

Snapshot of Victoria's eLearning Industry – 2002-03¹

- Employ's 1,500 (FTE)
- Total revenue of \$150-175m
- Exports over \$5m annually
- R&D expenditure approximately \$10 m
- Characterised by many small companies
- Principally focused on content –related activities

The following table provides a summary statistical overview of the composition of the eLearning industry in Victoria²:

eLearning Industry Structure	% of eLearning companies
Private ownership	84%
Australian owned companies	96%
Head Quartered in Victoria	91%
Majority of company operations in Victoria	93%
Companies with Head Office in Metropolitan Melbourne	80%
Companies established more than 5 years ago	61%
Companies exporting eLearning products and services	59%
Avg eLearning revenue as share of total company revenue	58%
Companies with less than 10 staff	61%
Companies with less than 10 eLearning staff	80%
Companies that reported some eLearning R&D expenditure	55%

Company Profiles

Victoria's eLearning industry comprises a mixture of start ups (39%), emerging (25%) and long established companies (36%).

The majority of companies are private, Australian-owned, small and medium sized enterprises.

Employment³

Companies with less than 10 staff accounted for 61% of total eLearning companies in Victoria but only 6% of total eLearning employment in Victoria.

Companies with 10 or more staff accounted for 39% of total eLearning companies in Victoria, but 94% of total eLearning employment in Victoria.

Contractors accounted for 8.6% of total eLearning companies' workforce in Victoria in 2002/03, compared to 2.5% in the 'Top 250' ICT industry companies in Victoria.

74% of eLearning company employees focus on content related activities including content development and services, instructional design, multimedia design and development and publishing.

Exports

59% of Victoria's eLearning companies indicated that they exported goods or services during 2002/03, although at that stage only achieving low export sales revenues.

¹ Summary of findings – Survey of Victoria's eLearning Industry, conducted for the Victorian Government by Whitehorse Strategic Group Ltd, December 2003

² Private sector only – does not include public sector organisations

³ Private sector employment, and does not include any professionals employed in public learning institutions.

For those eLearning companies that export, respondents nominated Asia/Pacific (38%), North America/Canada (28%) and Europe (28%) as the most common export markets. This order was the same as that for the Top 250 ICT companies in Australia.

Research and Development

A high proportion of companies are undertaking research and development (55%), but only spending low amounts.

Total Victorian eLearning industry R&D expenditure for 2002-03 is estimated at \$10 million.

Target Market Sectors

The Private Sector was reported as the most common target sector by 30% of Victorian eLearning companies and is expected to remain as the leading market over the next 3 years.

Business Activity

61% of companies focus on content-related activities including content development and services, instructional design, multimedia design and development, and publishing.

The majority of companies did not anticipate a significant change in their business focus over the next 3 years.

Victorian eLearning companies target markets

