Manpower Update Report

Catering Industry

2021

Hotel, Catering and Tourism
Training Board

ACKNOWLEDGEMENT

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Introduction

Background

The Hotel, Catering and Tourism Training Board (HOTB) of the Vocational Training Council (VTC) is appointed by the Government of the Hong Kong Special Administrative Region (HKSAR) to be responsible for, among other duties, determining the manpower situation and training needs of the hospitality industry which encompasses the catering, hotel and tourism sub-sectors, assessing whether the manpower supply matches manpower demand, and recommending to the VTC the development of vocational and professional education and training (VPET) facilities to meet the assessed training needs.

A new approach for collecting manpower information is adopted to enhance the effectiveness and better reflect the dynamics of the manpower situation.

Under the new approach, one full manpower survey is conducted every four years, and is supplemented by two manpower updates. The HOTB completed its latest manpower survey on catering industry in 2018 while two manpower updates will be conducted in 2021 and 2022.

The 2021 manpower information update comprises:

(a) a focus group meeting of the catering industry was conducted on 19 February 2021 to collect the views of industry experts on the latest developments in the industry, manpower and training needs, recruitment difficulties, and measures to tackle the challenges the industry faces; and

(b) desk research performed throughout the year from December 2019 to November 2020 to capture recruitment information as well as analysing job advisements, including job vacancies in the industry and its principal jobs, salary offered and academic qualifications requirement in the catering industry.

Objectives

The objectives of this manpower update report of the catering industry are:

(i) to examine the latest trends and developments;
(ii) to identify the manpower demand and training needs;
(iii) to explore recruitment difficulties; and
(iv) to recommend measures to meet the training needs and to ease the problem of manpower shortage.

Methodology

Overview

With reference to the 2018 full manpower survey, this update report further constructs the qualitative descriptions of the recent developments of the industry through a focus group meeting, supplemented by making reference to some quantitative data of recruitment advertisements from desk research.

Focus Group Meeting

Focus group members were selected from the different sectors of the industry with trusted knowledge of manpower situation of their individual sectors and respective understanding of the industry. To enhance the efficiency in collecting views, the size of the focus group was limited to seven persons.

The target participants of the focus group represented the following branches of the catering industry:

(a) Chinese restaurants;
(b) Restaurants other than Chinese;
(c) Fast food shops and a staff canteen of a sports education institute;
(d) Beverage serving places; and
(e) Event catering and other meal / food service activities.

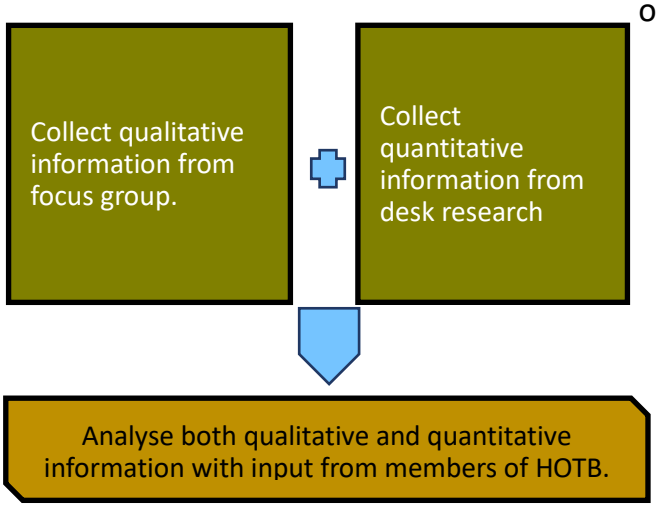
During the focus group meeting, participants discussed on topics supported by the HOTB via the Working Party on Manpower Survey of the Catering Industry under it. The discussions at the meeting were recorded and transcribed to facilitate analysis.

Desk Research

Manpower information of the desk research was obtained throughout the aforementioned period. An employment information system was developed to capture the relevant recruitment data consisting of vacancy advertisements, monthly salary ranges and academic qualifications required from major online recruitment portals and the Labour Department. Nearly 8,000 recruitment records were collected during the research period and served as indicative information of the job market trend. The list of related companies under the Hong Kong Standard Industrial Classification was mapped to remove duplicated records.

Data Analysis

The analysis consists of the following three steps:



After the above qualitative and quantitative analysis, the findings and recommendations were augmented and endorsed by the HOTB.

Limitations

Different from the extensive quantitative manpower survey performed in 2018, this update report aims to discover the emerging themes in the manpower development of the industry. The employment trends and behaviour, recruitment difficulties, insights and observations from the stakeholders' experience were captured through this focus group and desk research. While the update report has adopted the qualitative approach of focus group discussion which covered a controlled selection of stakeholders, it might not be generalised to the entire population. Desk research that gathered information of job vacancies from advertisements in major recruitment websites and the Labour Department, also might not be exhaustive without reference to any historical data, those were used as reference supplementary to the observations of the focus group.

Findings

Factors Affecting Development of the Industry

A Double Whammy

While the catering industry was panting from the social incident and the downfall of the local economy since mid-2019, the COVID-19 crisis took its toll on the sector just as severely as the other hospitality industry partners have been facing from early 2020. To curb the spreading of the virus, waves of shortening operational hours, responsible social-distancing requirements and customer capacity limit brought the catering industry to a standstill. The Government has already rolled out more than $300 billion in relief measures as part of an anti-epidemic fund and adopted budgetary measures to help the city to weather the storm, including offering wage subsidies for saving jobs, and one-off cash subsidies for eligible catering operators. As the pandemic situation remains volatile, room for full-scale lifting of social-distancing measures has to prudently considered. This in turn continue to affect livelihood and pressurise the catering business.

Plunging business volume and decreasing receipts of the restaurants sector, coupled with the inflexibility of some landlords in lowering commercial rent, shattered all sub-sectors of the industry but mostly the small and independent restaurants with plenty having to forgo staff, face bankruptcy and permanent closures. Larger scale establishments and those sheltered by hotels and catering groups may seem to be able to linger on; however, without sufficient patrons, dinner operations and banqueting, industry operators have to struggle arduously to cover the daily costs while trying to upkeep a bare minimum pool of staff.

Blazing New Trails

Industry personnel have displayed resilience over rough waters. While battling against the unprecedented storm, creativity, flexibility and agility come into play. The industry has been capitalising on the demand shift and incorporated new ways to stay afloat on likely opportunities.

The catering industry depends on both the locals and international arrivals. Travel restrictions, quarantine and lockdowns slashed international travel. Without incoming arrivals, the hotel plus Meetings, Incentives, Conventions and Exhibitions (MICE) sectors explored business from the domestic market. To recover partial business loss and keep the workforce intact, other than providing takeaway and delivery service to the neighbourhood and business communities, new food products and service extension across outlets were launched. Themed all-you-can-eat meal sets at tempting prices, wine and gourmet packages, speciality cakes and

festive delicacies riding on existing expertise and facilities were marketed through omni-channels. Semi buffets replaced full buffets to minimise food, utensils and people contact. Stringent hygiene and safety standards were complied with and publicised. Customers' confidence levels were raised and positive comments from patrons and bloggers drove more local customers.

With abrupt cancellations of dining reservations, restaurant owners shifted focus to takeaway and food delivery business. Competition increased sharply as on-demand food ordering apps became popular more than ever during the pandemic period and profit margins decreased while collaborating with food delivery platforms. To maintain the workforce and keep revenue rolling in, personal carpool food delivery service was established and the business was extended to preparing and serving cuisines on site by the owner-chef and staff. Other than being able to provide flexible delivery service, high standards of food safety, hygiene and quality can be maintained with professional expertise. Customised menus and attentive service strengthened business ties with customers for continuous business.

Events and outside catering business are put to a halt under gathering restrictions. Rather than idling the food production kitchens, festive foods and themed celebration food box sets with gimmicky designs are prepared in the facilities. Merchandising the food products via self-owned online shops and collaboration with food delivery platforms enabled a wider reach of customers. Some redundant employees took advantage of reduced rentals and ventured into small scale business including eateries of popular foods and drinks, patisseries, charcuteries and fine butcheries around the neighbourhood.

Weekend events and functions which used to fully utilise the catering facilities of an in-house canteen were zeroed out in the pandemic period. With high food and environmental safety and hygiene assurance, staff and athletes of a sports education institute consumed up to three meals daily at its canteen. As buffet style service was replaced by tailor-made meals served individually, the kitchen and service operations remained heavy during the pandemic period.

In response to social mobility restrictions and prolonged work-from-home periods, frequent dining out patterns are replaced by more home cooking. Amateurs aspire to cook like professionals and to share the "making of" and final products on social media platforms. Partially prepared "Cooking Packs for Amateurs" generate business from untapped market segments and "DIY Chef Kits" which final products resemble those as served in restaurants are well received.

Consolidation and Beyond

Hard times not merely brought challenges but served as a consolidation period to review quality, service and environment for capturing future opportunities. The slow business period provided a time gap to rethink business model, rebrand images,

redefine customers profile, and reframe operations to adjust cost ratios. While recovering loss painstakingly, operators strategised for the post-COVID period applying forward thinking and change management skills, stretching creativity and innovation limits. The relatively stagnant period enabled cross-departmental and multi-skill training which facilitate manpower scheduling and operational flexibility for future business development. Ready-minded entrepreneurs might ride on the lowered rental opportunity to start up their business.

Though unable to prognosticate the development of the pandemic and the economy, there is a tendency for economic activities and travelling to resume as the pandemic eases gradually. Venturing beyond the boundaries of Hong Kong, the development plan of the populous Greater Bay Area provides bountiful opportunities for employment and entrepreneurship. Locally, the loosening of gathering restrictions and extended dine-in hours seem to be shedding a glimpse of hope around the corner.

Technology

The pandemic accelerated contactless ways of doing business. Takeaway and food delivery provide lifeline to stricken businesses and restaurateurs co-operated more with online food delivery platforms for unlocking higher sales. Food ordering, queuing, pickup and payment via digital platforms and electronic means are gaining wide acceptance. Marketing, sales and public relations strategies are more actively driven on social media platforms and dedicated business websites. Comments from KOLs, influencers and customers are proactively managed to fortify customer engagement and enhance business outreach.

To align with the macro business environment of physical and mobile convergence, the industry is geared towards a wider adoption of technologies and automation in their business. In the short-term, full-scale adoption of automation and technologies in the industry may not be feasible due to physical and resources implications. Embedding technical intelligence is to create value enhancement for internal and external customers. In order to maximise favourable user experience without posing complications and frustrations, the “people element” and “spirit of hospitality” would always be cornerstones of technological and automation development and designs.

Manpower Demand

Focus Group

It is envisaged that streamlining of operations and workforce would be inevitable in view of economic slowdown and technological advancement. Yet, regional areas and overseas countries are entering a new phase in fighting the virus, while considering reviving economic activities and re-opening of respective

boarders. With various upcoming economic recovery measures and development initiatives spearheaded by the local Government, the tenacity of industry personnel to keep business buoyant, and with long suppressed dining out, gathering and entertainment, sentiments, respondents expressed optimism on the future of the industry in the middle to longer run.

Establishments are not just hiring "Waiters" for a Café or Chinese Restaurant or Bar but "F&B Servers". To support industry development and sustainability, employers would look for trained and multi-skilled staff possessing a wider spectrum of professional knowledge and skills for filling multi-tasked positions. The advantages are higher deployment flexibility, more in-depth professional staff development and better retention rate of quality staff. Furthermore, in a customer-centric industry, those with passion and the capabilities to empathise and solve complex problems with a human touch are highly valued.

Desk Research

Out of the relevant recruitment advertisements captured in desk research conducted throughout the year from December 2019 to November 2020, the comparison on the Desk Research data in the Manpower Update Report in 2018 are as follows:

Overall numbers of job vacancies advertisements

Comparing to the Manpower Update Report in 2018, the overall percentage of full-time job vacancies advertisements decreased by 53.7% while that of the part-time vacancies decreased significantly by 92.1%.

Among the decrease in the full-time vacancies by branch, only the Beverage Serving Places branch recorded growth, up by 20.2% in total; whereas the most obvious drop was recorded in the Chinese Restaurant branch with a decrease of 72.8% as compared to 2018.

For the number of full-time job vacancies advertisements by job levels, the Managerial / Professional level and the Supervisory level increased by 34.3% and 11.1% respectively while the Craft / Operative level has dropped by 69.5% comparing to those in 2018.

The observation might reflect that part-timers would not be required due to low business volume; the more senior and experienced employees have to be multi-tasked in assuming the operative duties as well.

For details, please refer to Appendices (a1) and (a2).

Principal Jobs

The top five principal jobs are noted to be the same in both 2018 and 2021. The highest number of full-time recruitment advertisements by descending order of percentages in 2021 is at follows:

	Principal Job	2021	2018
1	Waiter/Waitress; Dim Sum Sales; Receptionist; Hostess	21.6%	27.5%
2	Kitchen Helper; Cleaner; Dishwasher; Steward; Pantry Server/Helper; Washroom Attendant	10.8%	19.5%
3	Baker; Pastry Cook; Cook	7.8%	21.2%
4	Captain; Supervisor	6.5%	5.5%
5	Bartender; Barman; Barista; Mixologist; Soda Fountain Captain; Bar Helper	5.3%	8.9%

For details, please refer to Appendix (b).

Academic Qualification Requirements

Excluding the vacancies advertisements with unspecified requirements on employees' academic qualification, the qualification requirements are noted to have shifted to a higher end comparing to those in 2018. 41.2% of the advertisements in this research period specified 'Upper Secondary' education requirement, an increase of 26 percentage points as that of 2018. Over 33.3% of the advertisements required Diploma / Certificate / Apprenticeship or above levels in 2019-2020 while only 6.1% was noted in 2018.

Furthermore, only 6.2% of the job advertisements did not specify academic qualification requirements in this round of desk research, a drop of 41.9 percentage points comparing to that of 2018 (48.1%).

For details, please refer to Appendix (c).

Monthly Salary Ranges

Excluding the advertisements with the salary unspecified, the mean of salary range offered by the employers in the advertisements had also shifted to a higher end comparing to 2018. 50.8% of the advertisements offered monthly salary from $15k to $20k or above, an increase of 27.9 percentage points comparing to those of 2018.

For details, please refer to Appendix (d).

Training Needs

For in-service practitioners and educators

Under the new normal and increasingly competitive industry arena, it is considered necessary to update and upgrade industry knowledge and skills as follows:

a. Compliance and regulations –
   - Amplify relevant hygiene, health and safety regulations from top to operational levels with guidelines on best practices tailored for individual departments and properties.

b. Trade skills –
   - Hone global, regional and local culinary and catering expertise, developments and trends through upgrading training programmes and industry activities.

- Refresh trade knowledge and skills as well as generate fresh ideas from cross training and industrial attachments.
- Ideate menus, products and service that customers will expect in the future and to proceed with the necessary R&D and technological alignment.
- Customise traditional cooking methods and devise alternative use of ingredients to balance the needs of today's customers who are health and environmentally conscious while expecting refined senses with novelty.

c. Smart technologies –
- Manage social media platforms to boost revenue, grow the brand, engage customers, and create loyal followers.
- Master mobile devices and digital applications for effective management of business and delivery of customer service cycles. These include food ordering and POS via software systems for front-line supporters, especially for inexperienced and mature entrants; workforce scheduling system and strategic purchasing applications for supervisors and managers.
- Sharpen technical and presentation skills for engaging and influencing work and business associates via online meetings, training and sales pitches.

d. Generic Skills –
- Manage both online and offline complaints handling and problem solving riding upon professional trade knowledge and complaints handling skills.
- Agility to manage risk and unplanned changes under the framework of sustainable business planning.
- Strong self-management, interpersonal and communication skills.

For pre-employment students

a. Participants emphasised the importance to bridge the expectation gap between employers and the new entrants which contributes to better retention rates. While industry practitioners promote the positive aspects of the industry to attract new joiners, students should be made aware of the real working environment and the level of passion and determination required to succeed, whether as an employee or entrepreneur.

b. Other than equipping students with industry/profession-specific knowledge and skills, a user-friendly and practical curriculum embedded with industry digital expertise attracts young people.

c. To ease students into a multi-cultural society and globalised world, they should be enriched with cultural literacy, multi-lingual and the emerging skills prepared for employment, further studies and active global citizenship.

Recruitment Challenges

The industry used to lack manpower and in particular at the operative level. With the overall local unemployment rate at 7.2% and 14.1% for the catering industry for the period December 2020 to February 2021, it was expected that recruitment difficulties would be relaxed to a certain extent. While some employers could only retain a minimum number of full-time employees with mindful cost control, others have been hiring staff and facing recruitment challenges. Participants unanimously agreed that should the economy recover in the middle to longer term, recruitment challenges would continue. Recruitment difficulties encountered and possible factors are summarised below:

Limited talents

A plethora of post-secondary education opportunities is on offer locally or overseas. Nowadays parents in general would support their children to attain higher academic achievements rather than rushing them into the working world at an early age. Coupled with the overall declining birth rates, attracting young talents with higher academic qualifications to join the industry poses as a continuous challenge.

Life values

Work-life integration is the new work-life balance. People look for jobs that complement their lifestyles, family needs and aspirations. Being a slashie, part-timer, casual employee or riding on start-up support and incubation services for young people are taking over the traditional mindset of choosing a fixed employment route.

Keen market competition

Hiring operative level employees, whether full-time or part-time, is not easy. Some newcomers to the industry leave soon as they cannot adapt to the fast-paced industry with unsociable hours, less preferable working environment and non-competitive remuneration packages. Demand for employees with customer service mindset is strong within and across other service industries including hotel, tourism, retail, security and real estate management sectors.

Misconceived image

The catering business is a profession that requires robust mastery of trade knowledge and skills, with abundant opportunities to showcase creativity, innovation and other soft skills on local, regional and international platforms. Merely focusing on the service nature and working conditions of the industry overshadows the positive aspects of the industry.

Recommendations

To meet the future development of the industry, it is considered essential for the government, educators, business trainers, employers and employees to provide suitable manpower training and measures to ease manpower shortages in the following areas:

Government

a. Take a leading role to publicise and subsidise upgrading and reskilling training programmes and industry activities organised by reputable training institutions and organisations to boost continuous development culture.

b. Increase matching grant subsidies for employers to hire fresh graduates and job seekers from other industries.

c. Facilitate wider implementation of industry technological applications and automation with funding subsidies and technical support especially for the small- and medium-scale operators.

d. Collaborate with cross-industry stakeholders to showcase the achievements of young industry talents and winners of industry competitions for image building and attracting entrants.

Educators and Trainers

a. Design training curriculum by incorporating world skills standards, project-based-learning and digital-future-ready elements aiming at equipping students to tackle industry problems with practicable solutions riding on design thinking skills.

b. Internship programmes attached at dining establishments ease students into the real working world and provide taster opportunities on interesting jobs such as confectionery and patisserie chefs, baristas, tea masters, weddings and banquets co-ordinators. The industry and educational institutions should incorporate workplace learning and online assessment in the practical training programmes which timely feedback on the students' performance minimises expectation gaps between the industry practitioners and students.

c. Ride on the Greater Bay Area Development initiative to foster training, exchanges, industrial attachments and career development opportunities for students, instructors and industry personnel.

d. Other than pivoting vocational education and training on multi-skill and multi-task perspectives, it

would be necessary to train and retrain professionals and skilled employees to stay attuned to new industry requirements and evolving needs of customers with sophisticated global dining and wining exposures.

e. Learner-centric gamification enhances effective learning. Empower employees with mobile-friendly and fun-filled training content. Real-world business simulations and bite-sized training for tackling specific problems increase motivation and engagement.

Employers

a. An empathetic and caring employer-employee relation retains employees. Frank and open communications with teammates provide clear understanding of the business situation. Common goals and profits sharing assist to instil a sense of belonging and ownership among work associates.

b. Cultivate a company culture of lifelong learning to keep abreast of industry developments. Support staff to build up self-learning skills for acquiring emerging knowledge and skills and to attain professional qualifications through trade tests and Recognition of Prior Learning systems.

c. Storytelling moves and inspires people to consider entering the industry while experience sharing on the path to business success portraits realities. Coaching and supporting by dedicated mentors cement initial interest for new joiners and enhance staff retention.

d. Young people are gratified of their roles as change makers with ingenious contributions, especially using new technologies, to enhance workplace environment, service flow, kitchen management, sustainable purchasing and use of ingredients and culinary methods. Many have sharp senses in understanding customer behaviours, communication preferences and spending habits, in particular targets of similar age groups. Recognise their contributions and ride on their strengths to formulate business strategies will forge a mutually beneficial working partnership under a happy and harmonious working environment.

Employees

a. Different levels of practitioners, with or without industry experience, should take heed of rapid changes and new developments such as workplace technologies. Employees should ride on varied government funding schemes and employers' support and engage themselves with cross-training programmes for acquiring multi-skills and updated knowledge as well as certification of their working experience. Versatile skills not only benefit business needs but also contributes to individual's upward

progression and career mobility in the new economy.

b. Employees should participate in culinary and catering service competitions and trade tests to widen their exposure to innovative ideas and best practices.

Appendix (a1)

Number of Online Job Advertisements of Recruitment Sources from Dec 2019 to Nov 2020 by Branch

Full-time

Branch^	Managerial and Professional	Supervisory	Craft and Operative	Administrative and Others	**Comparing 2021 to 2018 (Total no. of ads by Branch)***
Chinese Restaurants	16.8%	22.5%	55.0%	5.8%	↓ 72.8%
Restaurants other than Chinese	15%	20.8%	57.8%	6.0%	↓ 62.7%
Fast Food Shops	27%	21.3%	45.4%	6.4%	↓ 63.9%
Beverage Serving Places	21.5%	20.7%	49.5%	8.3%	↑ 20.2%
Event Catering and Other Meal/Food Service Activities	20.4%	22.6%	47.2%	9.7%	↓ 45%
Private Clubs	14.1%	15.1%	65.3%	5.5%	↓ 37%
					↓53.7%

Part-time

Branch^	Managerial and Professional	Supervisory	Craft and Operative	Administrative and Others	**Comparing 2021 to 2018 (Total no. of ads by Branch)***
Chinese Restaurants	0	0	100%	0	↓ 97.4%
Restaurants other than Chinese	1.8%	2.8%	90.5%	4.9%	↓ 89.4%
Fast Food Shops	0	0	81.3%	19%	↓ 96%
Beverage Serving Places	0	2.8%	91.7%	5.6%	↓ 86.2%
Event Catering and Other Meal/Food Service Activities	6.8%	0	86.4%	7%	↓ 96.3%
Private Clubs	0	0	87.5%	12.5%	↓ 89.5%
					↓ 92.1%

Comparing to 2018 Full-time and Part-time %:	↓ 64%

Remark:

^ The calculation of percentage of advertisements in particular branches for 2021 :
(No. of advertisements of a branch against a job level/ Total no. of advertisements in the same branch) x 100%

*Method of comparing 2021 to 2018
- Period of data collection in 2018 : from 2nd Quarter of 2016 to 1st Quarter of 2017;
- Data in 2018 was collected from the selected online recruitment platforms by a random month in each quarter, whereas data in 2021 was collected once a month from December 2019 to November 2020. The data in 2018 was therefore grossed up for comparison purpose.

Appendix (a2)

Number of Online Job Advertisements of Recruitment Sources from Dec 2019 to Nov 2020 by Job Level

Full-time

Job Level #	Managerial and Professional	Supervisory	Craft and Operative	Administrative and Others	
Chinese Restaurants	4.8%	5.5%	5.1%	4.3%	
Restaurants other than Chinese	45.8%	52.7%	55.5%	46.3%	
Fast Food Shops	11.5%	7.7%	6.2%	7.0%	
Beverage Serving Places	12.0%	9.8%	8.9%	11.9%	
Event Catering and Other Meal/Food Service Activities	19.3%	18.2%	14.4%	23.8%	
Private Clubs	6.6%	6.0%	9.9%	6.6%	
Comparing to 2018 (Total no. of ads by Job Level)*	↑ 34.3%	↑ 11.1%	↓ 69.5%	↑ 48.4%	↓ 53.7%

Part-time

Job Level #	Managerial and Professional	Supervisory	Craft and Operative	Administrative and Others	
Chinese Restaurants	0	0	2.2%	0	
Restaurants other than Chinese	66.7%	90.0%	71.1%	55.2%	
Fast Food Shops	0	0	6.3%	20.7%	
Beverage Serving Places	0	10.0%	8.0%	6.9%	
Event Catering and Other Meal/Food Service Activities	33.3%	0	9.2%	10.3%	
Private Clubs	0	0	3.4%	6.9%	
Comparing to 2018 (Total no. of ads by Job Level)*	↓ 50%	↓ 88.5%	↓ 92.8%	↑ 7.4%	↓ 92.1%

Comparing to 2018 Full-time and Part-time %:	↓ 64%

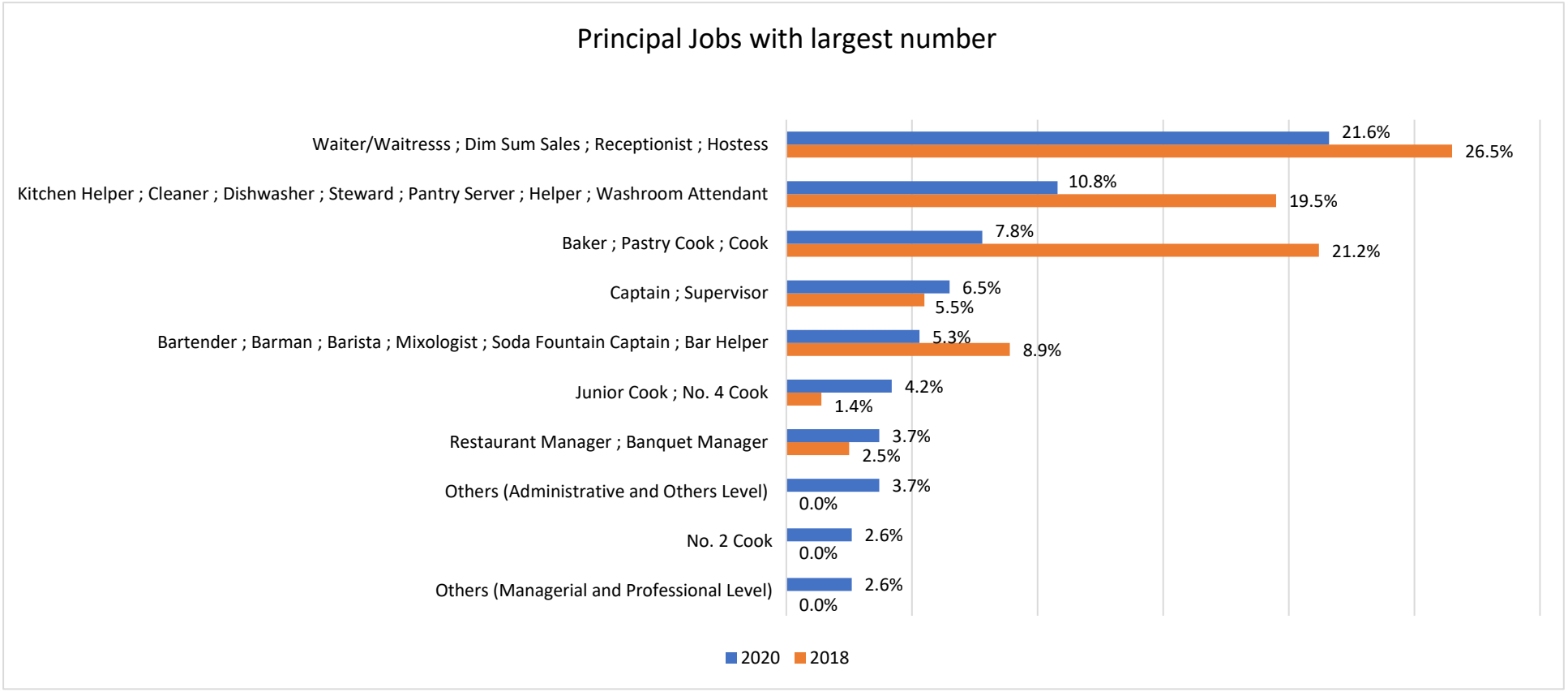
Remark:

The calculation of percentage of advertisements in particular job level for 2021 :
(No. of advertisements of a job level against a branch/ Total no. of advertisements in the same job level) x 100%

*Method of comparing 2021 to 2018
- Period of data collection in 2018 : from 2nd Quarter of 2016 to 1st Quarter of 2017;
- Data in 2018 was collected from the selected online recruitment platforms by a random month in each quarter, whereas data in 2021 was collected once a month from December 2019 to November 2020. The data in 2018 was therefore grossed up for comparison purpose.

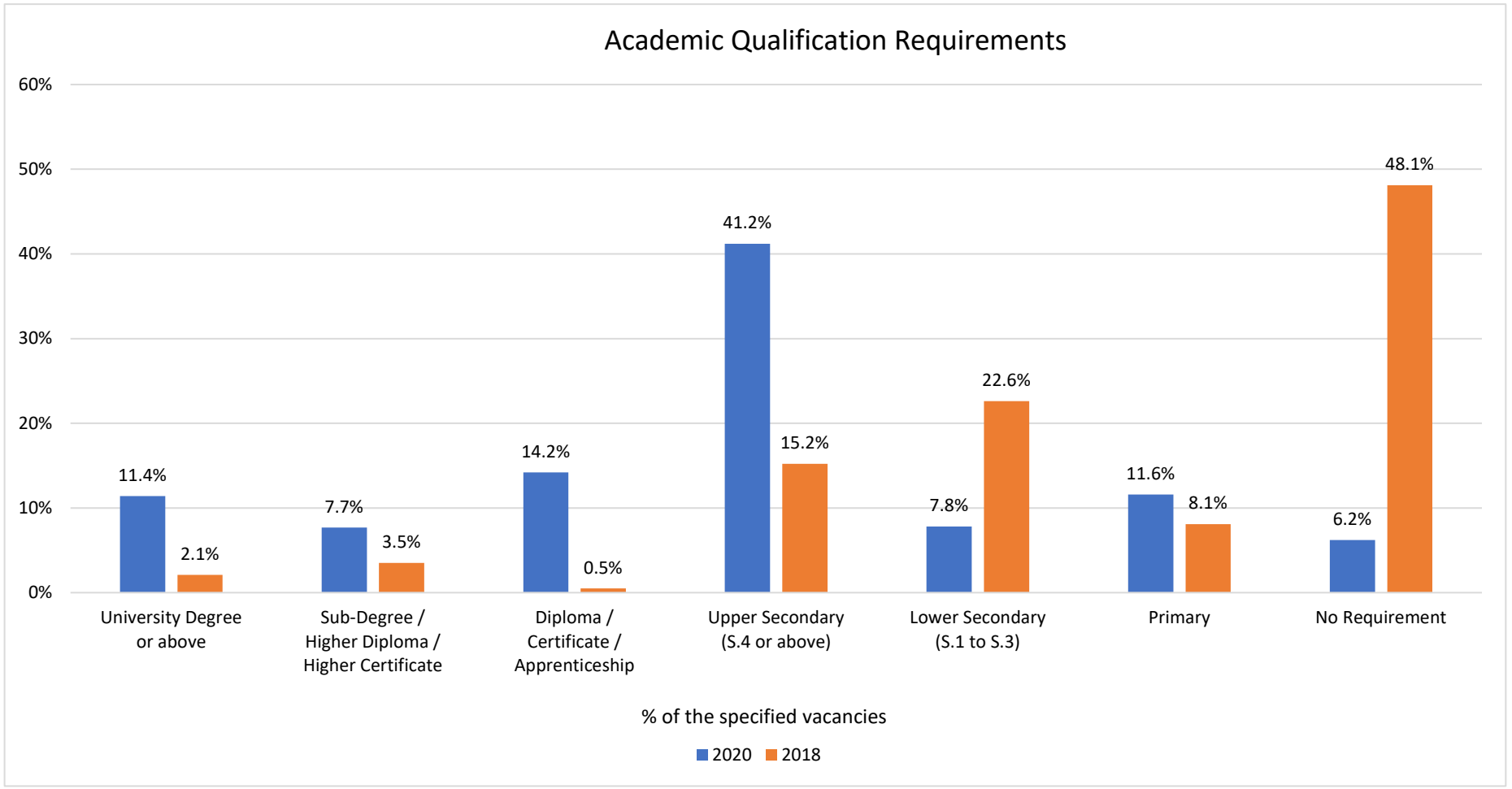
Appendix (b)

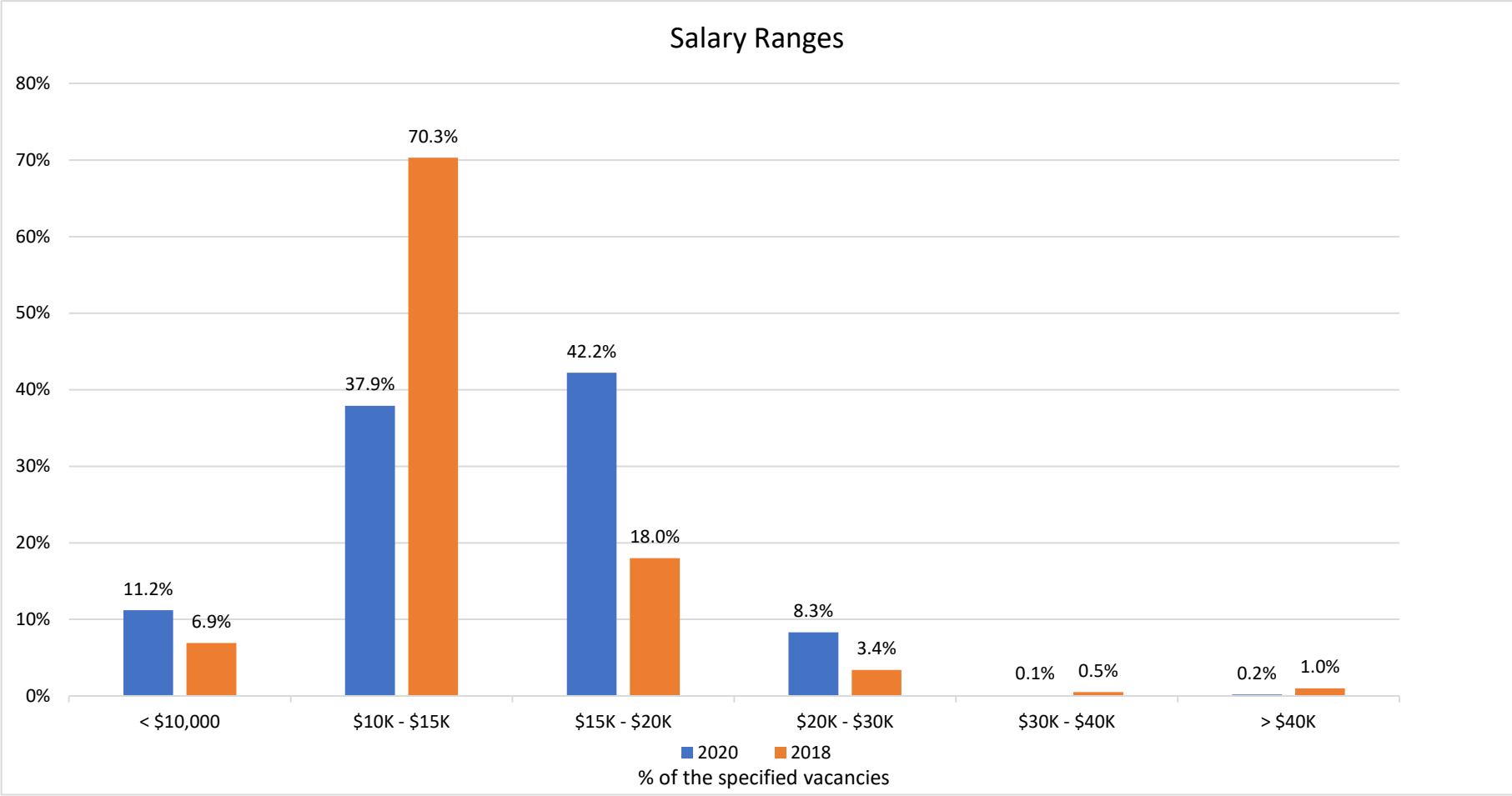
Number of Full-time Online Job Advertisements of Popular Recruitment Sources of Principal Jobs from Dec 2019 to Nov 2020



Appendix (c)

Number of Full-time Online Job Advertisements of Popular Recruitment Sources from Dec 2019 to Nov 2020 by Qualification Requirements



Appendix (d)

Number of Full-time Online Job Advertisements of Popular Recruitment Sources from Dec 2019 to Nov 2020 by Monthly Salary Ranges