



Manpower Update Report

Print Media and Publishing Industries

2020

Print Media and Publishing Training Board

ACKNOWLEDGEMENT

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Introduction

Background

The Print Media and Publishing Training Board (PPTB) of the Vocational Training Council (VTC) is appointed by the Government of the HKSAR. According

to its Terms of Reference, the PPTB is responsible for determining manpower demand of the industry, 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 in the various industries.

Under the new approach, one full manpower survey is conducted every four years, and this is supplemented by two manpower updates. The PPTB completed its latest manpower survey in 2016. Two manpower updates were conducted in 2019 and 2020.

The 2020 manpower information update comprises:

(a) a focus group meeting getting the views of industry experts on the latest developments in the industries, manpower and training needs, and recruitment

difficulties, and measures to tackle the challenges the industries faces; and

(b) desk research analysing job advisements including qualifications, experience and skills required, and salaries offered by the principal jobs in the Print Media and Publishing (PP) industries.

Objectives

The objectives of the manpower update are:

- (i) to examine the latest trends and developments of the industry;
- (ii) to explore the job market situation and training needs;
- (iii) to identify the recruitment challenges; and
- (iv) to recommend measures to meet the training needs and to ease the problem of manpower shortage.

Methodology

Overview

With reference to the 2016 full manpower survey of the PP industries, this update report aims to provide qualitative descriptions of the recent development of the industries through focus group meeting, supplemented by making reference to some quantitative data of recruitment advertisements from desk research.

Focus Group Meeting

The focus group members are representatives from three sectors of the Printing industry, including 1. Newspaper printing, 2. Job printing, 3. Packaging printing, and three sectors of the Publishing industry, including 1. Trade book publishing, 2. Textbook publishing, and 3. Publishing enterprise involved in digital publishing.

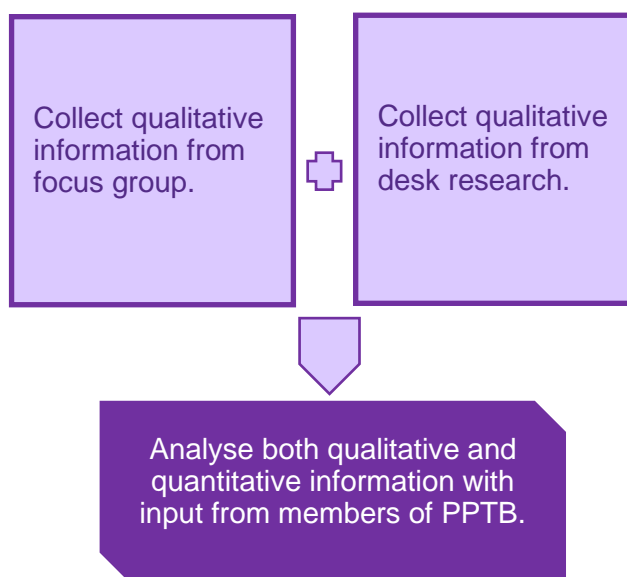
The focus group meeting was conducted on 21 November 2019. The Secretariat staff as the moderator led members to in-depth discussion on topics selected by the Working Party on Manpower Survey of the PPTB. The discussions at the meeting were recorded and transcribed to facilitate analysis.

Desk Research

Manpower information covering the period between Quarter 3 of 2018 and Quarter 2 of 2019 was collected through desk research by quarter. An employment information system was developed to capture the relevant recruitment data from major online recruitment portals. Some 2,000 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:



Limitations

As this is not a full manpower survey, the findings and recommendations of the focus group meeting are more qualitative in nature and the report focuses mainly on the manpower trends. The information of job advertisements was collected from

major recruitment websites and the Labour Department. Other channels, such as head hunting for managerial positions, were not covered. Since the data collected is a snapshot of a particular period without reference to any historical data, this can serve as reference information supplementary to the findings of focus group meeting.

Findings

Factors Affecting the Development of the Industry

Global Business Environment

The global business environment of print media industry is mostly affected by the growth of electronic alternatives in publishing products, newspapers and magazines, and the shift of advertising spending to online and social media. While printing of directories and catalogues declines, packaging and label printing remain the major growth sector of the industry.

Print customers, such as publishers and packaging buyers source globally for high-quality products. Hong Kong as one of the world's major printing centres, exports or re-exports print products from China, to key markets in the United States and Europe. Most Hong Kong printers relocated production to Mainland China

and maintains Hong Kong offices to receive local and overseas orders.

Production cost has been increased for Hong Kong printers in the past two years as caused by fluctuations in Renminbi, rise in paper price as well as tax and duties. The wage growth in China also increases labour cost which is one of the factors that forces some print manufacturers to consider moving factories to other countries.

Changes in global trade policy especially affected the print media industry in recent years. The business sentiment oscillated back and forth according to the latest Sino-US trade-related news in 2019. US print buyers and Hong Kong printers looked for contingencies and prepared for the uncertainties incurred by the trade negotiations. Moreover, the impact of Brexit on global economy and the

post-Brexit Sino-UK trade deal remain causes of concern.

Prospects in China market is positive in the long term. Its fast-growing consumer market demands products such as high quality packaging solutions for toys, cosmetics, and other consumer products.

Similar to the print media industry, the publishing market is also affected by the readers' increased acceptance in receiving information or learning through electronic devices.

In the US where reader was launched a decade ago, readers are shifting their interest from ebook to audio books which caused the sales of former flattened off in recent few years.

While education publishing houses invested on developing e-learning materials which incorporated AI technology to improve students' learning effectiveness. Readers prefer to buy trade books in print version especially in genres such as nature, cookery and children's books.

In China, the publishing market continues to expand. The children's book market contributes significantly to the growth. Parents in China are more aware of the importance of reading to children's development and more willing spend on children's book. Moreover, the liberalisation of one child policy will continue to fuel the demand for quality children's book and learning materials.

Other uncertainties that affect the global business environment of the print media

and publishing industries include the economic ramifications of social unrest and the outbreak of epidemic in China and other countries.

Local Business Environment

The competition in the print media industry is keen. The local print run for books has dropped as readers changed their reading habits in the past few years. The domestic unrest and local economic downturn also reduced frequency of advertising campaigns which in turn affected the order for posters, flyers, brochures and marketing materials.

To cope with the trend of small print runs, some printers invested in digital printing machines which enables more print-on-demand jobs and more customised products. Printers which diversified business in markets of the US, Europe, China and countries in Asia Pacific, continuously evaluate the potential opportunities and challenges brought by the implementation of tariff. Some printers also enriched their business portfolio by expanding to marketing and publishing.

On the other hand, the publishing industry expanded in 2014 and 2015 while the small-size and independent publishing start-ups grew to a peak. However, in view of the weakened consumer spending in 2019 and 2020 and the diminishing demand for trade book, it is expected that there will be consolidation especially for small-sized trade book publishing houses

in the next two to three years.

Despite the demand for physical books has been decreased in the past years, the demand for e-learning products and value-added products such as themed talks and seminar are becoming more popular.

Technology

Migration into Industry 4.0

Upgrade of equipment to facilitate the migration into industry 4.0 in printing factories becomes the trend in China. Apart from print manufacturers' concern on the investment on finance and human resources associated with industry 4.0, the limited space of Hong Kong factories is also one of the difficulties faced by printers to re-organise the production system for industry 4.0.

Instead of re-organising the whole production system, some printers renew post-print machines that require less manual operation so that less skillful manpower such as part-time workers can be used.

Enhancing E-commerce system

Printers also invested on enhancing the e-commerce system that customers interact with. The simplified online order placing platform is made more user-friendly and easy to understand. Customers receive quotations, status of print order and shipping information via the platform easily. The simplified and automated system reduces the manpower

required to handle customers' phone enquiry and improves customers' confidence.

In the publishing industry, as more consumers develop habit of online shopping, publishing houses have to include online sales channels in the distribution strategy. There are also more promotion and marketing campaigns conducted through digital and social media to engage readers.

Policy

Impact of free trade dispute

The Sino-US trade war had impacted print exports in the past year and its effect is expected to prolong in the industry. An additional 15% tariffs on printed books, maps and pictures were effective from 1 September 2019, which imposed extra cost to print manufacturers and affected the quantity and size of orders from US clients. Some clients requested manufacturers to lower the product price or to consider relocating their manufacturing plant from China to other countries in order to diverse risks associated with the trade war.

To cope with the extra cost caused by the tariffs imposed, some printers considered moving print production back to Hong Kong. However, the contingency plan seemed impossible given the high manufacturing cost and insufficient production manpower and expertise in Hong Kong.

Manpower Demand

Focus Group

With reference to the trends and development of the industries, views of the focus group on the anticipated changes in manpower demand were collected. Principal jobs in high demand related to e-publishing, e-learning and color management were identified.

Desk Research

Out of the relevant recruitment advertisements captured in desk research, the percentages of recruitment advertisements and their respective job levels were identified:

Print media industry	
Technological/Managerial	7.4%
Technician/Supervisory	70.3%
Craftsman	20%
Unskilled	2.4%
Publishing industry	
Managerial	9.7%
Supervisory	34.7%
Technical Staff	55.6%

Comparison with previous manpower survey / update

Mixed skillset

Compared with the results of full manpower survey in 2016, it is observed that both the print media and publishing industries require employees to have multiple skills as technology advances and work process consolidates. For instance, a prepress technician has to equip with skills of digital printing. Some offset printing machine operators also learn about digital printing machine through on-the-job training.

Holistic approach

Employers emphasised on employees' ability to handle projects or solve problems from a holistic point of view. In print media industry, the ability to consider holistically is especially needed in middle management, sales and customer service staff while the latter connects customer and production team and managers are the key decision makers. In publishing industry, the editor is responsible for executing the publishing project. As publishing products varies from physical book to e-book, e-learning products, the editor has to be familiar with workflows of developing different products. Good knowledge and a holistic view would be essential for the editor to work with teams efficiently.

Training Needs

Trade Specific Skills

The trade specific emerging skills identified are summarised in the table below.

Emerging Skills	Related Job Titles
E-publishing skills	<ul style="list-style-type: none">• Editor• Designer
Apps development workflow	<ul style="list-style-type: none">• Editor• E-publishing technician
E-learning product development	<ul style="list-style-type: none">• Editor• E-publishing technician• Designer
Digital marketing and social media marketing	<ul style="list-style-type: none">• Editor• Publishing customer service and sales representative
Data analysis	<ul style="list-style-type: none">• Publishing sales and marketing manager• Printing sales and customer services manager
Problem solving skills	<ul style="list-style-type: none">• Printing customer service and sales• Printing middle management
Color management knowledge	<ul style="list-style-type: none">• Printing customer service, sales and marketing representative
Security printing and privacy handling in print job processing	<ul style="list-style-type: none">• Printing machine operator• Production manager, production planner

Recruitment Challenges

Due to the keen competition of the market, some employers have experienced challenges in the recruitment process. The difficulties encountered and possible factors are summarised below:

Preference of the young generation

Print media industry, especially offset printers found it difficult to recruit young people to join. Working in the factory environment might not be appealing to young people. Moreover, the requirements of working on Saturdays and shift work do not match young generation's expectation of work-life balance while developing their career. Some companies turned to recruit retired employee to support the night shift production instead.

Limited manpower supply in the market

Supply of manpower is especially limited for positions such as print machine operator. Most experienced operators are at retirement age and have to continue to work as new blood for replenishment is limited. Young generation who received training in design and print media prefers positions of pre-press, sales and marketing when joining the industry.

Keen market competition

Most education publishing house requires editors to possess University degree or above. It becomes more difficult to attract fresh graduates to join the publishing industry when schools offer more attractive remuneration package and career opportunities for teachers. Young generation's limited understanding on the publishing industry and its related jobs also contributes to the problem of manpower succession. Experienced editors might continue to work after retirement age in some publishing companies.

RECOMMENDATIONS

To meet the future development of the industries, it is considered essential for the government, education institutions and industry employers to provide suitable training opportunities to the employees and students in the following areas:

Government

Image of a professional career

The Qualifications Framework (QF) offers an excellent platform to encourage lifelong learning. Its clearly defined standards allows the public to understand the qualifications required in the industries. It is recommended that QF promotion in print media and publishing industries can be further strengthened in the industries and the public, especially young generation. Better understanding of the industries' requirement and its professionalism facilitates young people's informed choice of career development.

Support for recruiting middle-aged manpower

The shortage of print machine operator existed for years in the print media industry. To ease manpower shortage, the Employees Retraining Board (ERB) might collaborate with print enterprises and invite course providers to offer training programmes on print machine operation targeting middle-aged or unemployed manpower.

Education Institutions

Offering professional training for potential editors

Professional and systematic training is currently not available in the market and it is needed by young people who are interested in being an editor. The training should adopt a holistic approach to introduce the work process of a publishing project, including an introduction of the publishing business, the editor's main duties, the core skills required by the editor as well as basic knowledge of pre-press and post-press. The professional training would allow new entrants to have better understanding and reasonable expectation on jobs in the publishing industry.

Collaboration project

The print media industry is currently actively supporting collaboration projects with students. The publishing industry also welcomes education institutions to conduct collaboration project on book or publication editing and production so that students could learn step-by-step through the whole process.

Enhancing knowledge on print workflow and production

The focus group reflected that most print media and publication design students are capable in generating design ideas but need more exposure especially on step-by-step print production workflow to realise the design into a real product. It would be beneficial for education institutions to collaborate with the industry to strengthen students' knowledge in printing workflow and production.

Training pattern for in-service practitioners

Both the print media and publishing industry employers reflected that most young employees do not prefer attending training course after work. Part of the reason is probably their technological capabilities enable them to work remotely and seamlessly, which make them found it hard to achieve work-life balance if they do not reserve time for their family or spouse (who probably also works full time) or other life experiences. Education institutions should provide part-time day release training or training during office hour to help young practitioners keep up with the latest skills needed in the industry.

Employers

Training at workplace

Providing on-the-job training is necessary for publishing houses and printers to hire a new junior staff member in order to

furnish them with the essential knowledge of various types of order and products. The form of training ranges from regular workshops led by colleagues or in-house training programmes. Some companies carried out trainee programmes to train up new staff. Similar to the apprenticeship system, trainees were assigned a mentor to learn from the everyday decision making in real work environment. Focus group members agreed that on-the-job training is effective in helping getting new staff on track.

Supporting employees training

Both the print media and publishing industries require employees to possess skills of various disciplines, it is time for employers to offer greater support to encourage cross-function learning through in-house or external training programmes. For instance, some printers encouraged sales and marketing staff to obtain color management professional certification as better trust from customers is gained by offering expert advice. There are also employers offered comprehensive in-house training covering the whole process from design, product development, production to delivery, with an aim to equip all staff members a holistic view of the operation.

Employment flexibility

Young generation treasures their autonomy on time management, some of them are more willing to work part-time to enjoy greater flexibility. There are more printers started to incorporate part-time staff in the workforce, which also include

middle aged parents or carers who wish to re-enter the job market after a career break.

Employees

Proactive to learn

Employees should keep themselves updated with the latest development of technology and trends in the industry. They should also proactively offer suggestions to employers on training that would facilitate team performance.

Making use of Government's subsidy

With effect from 1 April 2019, the Government has increased the Continuing Education Fund (CEF) subsidy ceiling from \$10,000 to \$20,000 per applicant. Employees should make good use of the subsidies provided by the Government for lifelong learning.

Number of Advertisements from Popular Recruitment Media
(Q3 2018 to Q2 2019) by Job Levels and Sectors (Print Media Industry)

Job Levels Sectors	Technologist / Managerial		Technician		Craftsman		Unskilled		Total	
	Newspaper Printing	-	-	5	0.71%	-	-	-	-	5
Job Printing	33	4.67%	293	41.50%	120	17.00%	15	2.12%	461	65.30%
Printing and allied Industries	4	0.57%	21	2.97%	3	0.42%	1	0.14%	29	4.11%
Manufacture of Containers and Boxes of Paper and Paperboard ¹	-	-	-	-	1	0.14%	-	-	1	0.14%
Printing Agents	11	1.56%	151	21.39%	7	0.99%	1	0.14%	170	24.08%
Selected Organisations ²	3	0.42%	16	2.27%	10	1.42%	-	-	29	4.11%
Advertisement from publishing companies	1	0.14%	10	1.41%	-	-	-	-	11	1.55%
Total	52	7.37%	496	70.25%	141	19.97%	17	2.41%	706	100%

¹ only Printing and related activities

² For example, print suppliers and printing department of academic institutions

Number of Advertisements from Popular Recruitment Media
(Q3 2018 to Q2 2019) by Job Levels and Sectors (Publishing Industry)

Sectors	Job Levels		Managerial		Supervisory		Technical Staff		Total	
Publishing of newspapers	16	2.58%	41	6.62%	69	11.15%	126	20.36%		
Publishing and Allied Industries	36	5.82%	160	25.85%	233	37.64%	429	69.31%		
Wholesales of Books, Periodicals and Newspapers	-	-	2	0.32%	3	0.48%	5	0.81%		
Import and Export of Books, Periodicals and Newspaper	1	0.16%	6	0.97%	4	0.65%	11	1.78%		
Selected Organisations ³	3	0.48%	3	0.48%	4	0.65%	10	1.62%		
Advertisement from printing companies	4	0.65%	3	0.48%	31	5.01%	38	6.14%		
Total	60	9.69%	215	34.73%	344	55.57%	619	100%		

³ For example, publishing department of academic institutions

Number of Advertisements from Popular Recruitment Media
(Q3 2018 to Q2 2019) by Monthly Salary Ranges by Job Level
(Print Media Industry)

Salary Ranges \ Job Level	<\$10K	\$10K - \$15K	\$15K - \$20K	\$20K - \$30K	Unspecified	Total
Technologist / Managerial	0	0	2	1	49	52
Technician / Supervisory	6	130	33	3	324	496
Craftsman	3	78	6	1	53	141
Unskilled	3	11	1	0	2	17
Total	12	219	42	5	428	706

Number of Advertisements from Popular Recruitment Media
(Q3 2018 to Q2 2019) by Monthly Salary Ranges by Job Level
(Publishing Industry)

Salary Ranges \ Job Level	<\$10K	\$10K - \$15K	\$15K - \$20K	\$20K - \$30K	Unspecified	Total
Managerial	-	1	-	-	59	60
Supervisory	-	17	1	-	197	215
Technical	3	42	3	-	296	344
Total	3	60	4	-	552	619

Number of Advertisements from Popular Recruitment Media
(Q3 2018 to Q2 2019) by Qualification Requirements
(Print Media Industry)

Job Level \ Qualification	First Degree or above		Sub-Degree, Prof. Diploma or Certificate		Upper or lower Secondary		Primary, no requirement or unspecified	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Technologist / Managerial	23	44.23%	17	32.69%	2	3.85%	10	19.23%
Technician / Supervisory	79	15.93%	180	36.29%	195	39.31%	42	8.47%
Craftsman	2	1.42%	5	3.55%	70	49.65%	64	45.39%
Unskilled	0	-	0	-	5	29.41%	12	70.59%
Total	104	14.73%	202	28.61%	272	38.53%	128	18.13%

Number of Advertisements from Popular Recruitment Media
(Q3 2018 to Q2 2019) by Qualification Requirements
(Publishing Industry)

Qualification Job Level	First Degree or above		Sub-Degree, Prof. Diploma or Certificate		Upper or lower Secondary		Primary, no requirement or unspecified	
	Managerial	39	65.00%	10	1.67%	2	3.33%	9
Supervisory	105	48.84%	75	34.88%	16	7.44%	19	8.84%
Technical	175	50.87%	95	27.62%	42	12.21%	32	9.30%
Total	319	51.53%	180	29.08%	60	9.69%	60	9.69%