

Executive Summary

2004 Manpower Survey Report of the Printing and Publishing Industries

Introduction

The Printing and Publishing Training Board conducted a survey of the printing and publishing industries in May/June 2004 to collect the up-to-date manpower information. This is the second joint manpower survey of the printing and publishing industries.

2. The fieldwork of the survey covered 735 establishments from a total of 5 493 establishments registered with the Census and Statistics Department. The survey data from the selected establishments were scaled up statistically to reflect the overall manpower situation of the industries.

Survey Findings

3. The survey revealed that in June 2004, a total of 21 222 and 7 716 technical workers were employed respectively in the printing and publishing industries. The distribution of employees according to the job level in the branches is as follows:

(A) *Printing Industry*

Job Level Branch	Technologist/ Managerial	Technician	Craftsman	Operative	Unskilled	Total	Percentage of Total Number of Employees
Newspaper Printing	13	136	497	23	37	706	3.3%
Job Printing	334	3 077	8 326	507	1 295	13 539	63.8%
Other Printing and Allied Industries	29	693	2 531	224	176	3 653	17.2%
Containers and Boxes of Paper and Paperboard	7	59	223	66	27	382	1.8%
Printing Agents	368	2 187	58	-	2	2 615	12.3%
Printing Sections of Academic and Training Institutions and the Agencies and Departments in the HKSAR Government	8	56	181	40	42	327	1.6%
Total	759	6 208	11 816	860	1 579	21 222	100%
Percentage of Total Number of Employees	3.6%	29.2%	55.7%	4.1%	7.4%	100%	

(B) *Publishing Industry*

Job Level Branch	Managerial	Supervisory	Technical Support	Total	Percentage of Total Number of Employees
Publishing and Allied Industries	671	1 858	4 006	6 535	84.7%
Wholesales of Books, Periodicals and Newspapers	21	117	100	238	3.1%
Import and Export of Books, Periodicals and Newspapers	36	195	387	618	8.0%
Selected Organizations	50	120	155	325	4.2%
Total	778	2 290	4 648	7 716	100%
Percentage of Total Number of Employees	10.1%	29.7%	60.2%	100%	

4. Employers reported a total 242 and 109 vacancies, representing about 1.1% and 1.4% of the total workforce in the printing and publishing industries respectively at the time of survey. Employers also reported a total of 101 trainees representing 0.5% of the total number employed in the printing industry. There were no trainees in the publishing industry. In addition, employers forecast that by June 2005, the two industries would have a total workforce of 21 614 in the printing industry and 7 842 in the publishing industry.

Manpower Changes

(A) *Printing Industry*

5. Compared with the findings of the 2002 survey on the printing industry, the annual decline in manpower was 0.8%.

6. The Training Board considers that in the printing industry, the modest manpower contraction over the past two years is attributable to the following:

- (a) The trend of moving towards higher end production and adoption of more advanced technology had been continuing, resulting in a moderate increase in manpower at the technologist/managerial and technician levels, but a decrease of workers at the craftsman and operative levels.

- (b) There had been an increase in the number of printing agents due to some small and medium printing companies converting their business activities to become sales or co-ordinating and supplies agents. There was also an increasing demand for technician level personnel for providing support services to the operations shifted to Mainland China by local printers.
- (c) The number of cost estimators/sales representatives as well as customer services co-ordinators had increased from 4 297 to 4 835 representing an annual increase of 6.1%. This might be contributed by the growing business activities generated by the continuous thriving of the Mainland's economy.
- (d) There had been a consistent demand for manpower skilled in desktop prepress and conversant in the application of computers in the past two years. The number of electronic prepress system craftsman had increased from 2 055 in year 2002 to 2 287 in year 2004, representing an annual increase of 5.5%.
- (e) The annual increase of 5.1% in the number of offset lithographic plate makers was due to the continuing adoption of traditional plate making method in parallel with modern computer-to-plate technology.
- (f) Due to fierce competition within Hong Kong, several of the local newspaper and magazine companies had contracted out their production or shifted their production to the Mainland, resulting in a reduction of manpower in the newspaper printing branch.

(B) *Publishing Industry*

7. Compared with the findings of the 2002 survey on the publishing industry, the annual increase in manpower was 2.3%. The Training Board considered that in the publishing industry, the manpower expansion over the past two years is attributable to the following:

- (a) There were 41 newly identified establishments during the survey period, representing 16.4% of the sample size of the publishing industry.
- (b) In order to increase the cost-effectiveness of operation, quite a number of organizations have reduced their employment size at the managerial and supervisory levels.
- (c) The substantial annual increase of 18.2% in the number of employees at the technical support level indicates that there is appreciable growth in the publishing business and more front-line workers have been engaged.

8. Over the past few years, there have been two major developments in the printing industry in Hong Kong. Firstly, the greater automation of printing processes and the widespread adoption of computer technologies in the prepress industry, in particular the popular use of computer to plate have resulted in the significant improvement in both quality and productivity as well as manpower saving. Secondly, with the opening up of Mainland's economy, the labour-intensive operations have been progressively relocated to the Pearl River Delta areas. Those processes remaining in Hong Kong are generally more sophisticated, technical and quick-responsive. Such developments have prompted the need for a major restructuring of the manpower resources. Traditional craft and operative jobs have either been phased out or have been diminishing in substantial numbers while the continuing demand for computer literate manpower would be sustained. In the light of many manufacturing firms becoming trading firms in the past two years, it is envisaged that more sales representatives, customer services co-ordinators and quality controllers at technician level would be needed to cater for the transforms of the industry. To meet the development needs of the industry, there should be an on-going demand for technologists and technicians, while at the craftsman level, the traditional prepress craft jobs will gradually become obsolete.

9. The Training Board is of the view that the practice of conducting manpower survey at a 2-year interval is useful in building up a series of historical data for comparison and for projecting future manpower requirements. Such a practice should continue so that the manpower and training situation of the printing and publishing employees will be closely monitored. Based on the information, the Training Board can recommend measures to meet the training needs.

10. The Training Board recommends that the overall additional number of workers required annually by the printing and publishing industries as a whole at these job levels are estimated to be as follows:

Job Level	Additional Manpower Required Annually	
	Printing	Publishing
Technologist/Managerial	30	26
Technician/Supervisory	323	79
Craftsman/Technical Support	287	252

11. The Training Board urges employers to make use of the part-time courses offered by the Department of Printing and Digital Media, the Hong Kong Institute of Vocational Education (Kwun Tong), the Printing Industry Training Centre and the Advanced Printing Technology Centre to upgrade their workforce. Employers are also encouraged to contact the Industrial Training Division of the Vocational Training Council to set up training schemes and to make use of the New Technology Training Scheme for training their employees in new technologies.