

2004 Manpower Survey Report

Retail Trade

零售業

二 四年人力調查報告

Retail Trade Training Board

Vocational Training Council

職業訓練局

零售業訓練委員會

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SECTION I

EXECUTIVE SUMMARY

About the Survey

1.1 The Retail Trade Manpower Survey is conducted every two years to collect data on the current manpower situation in order to project future manpower requirements and training needs of the industry. Out of the 45 034 registered companies in the retail industry, 640 companies were selected by a stratified random sampling method across 13 branches for the survey.

1.2 The current round survey was conducted in **September to October 2004**. In comparing the manpower demand for 2002 and 2004, readers are reminded to note the two surveys were conducted at different periods of the year. The 2002 survey was conducted in November to December, which is the typical peak trading season in the retail industry. Manpower level during this peak season is generally higher than other periods of the year.

Business Outlook

1.3 Hong Kong has experienced a broad-based economic recovery in 2004. With sustained strength in both external factors and domestic demand, the economy performed stronger than expected, growing by 12.1% and 7.2% in the second and third quarter respectively. GDP growth for the whole year of 2004 is estimated to be 8%.⁽¹⁾

1.4 Along the strong economic recovery, consumer confidence has gradually picked up. The retail industry has witnessed steady growth in 2004. Total **retail sales for 2004** was HK\$191 599 million⁽²⁾, **increased by 10.8% in value** or 9.1% in volume over 2003.

1.5 The Government has been vigorously promoting Hong Kong as Asia's World City and shoppers' paradise through the development of different market regions. The strong growth in inbound tourists also helps boost the retail recovery. Total **visitor arrivals for 2004** made new record to reach some 21.8 million. It represented an **increase of 40.4%** on last year, with all market regions showing double-digit growth⁽³⁾. Visitors from Mainland China have increased most significantly, with arrivals reaching 12.2 million, +44.6% on 2003. Mainland visitors accounted for 56% of total arrivals in 2004. The surge in Mainland visitors will continue with the opening up of more cities under the "Individual Visitor Scheme".

1.6 In 2005, the general business environment shows positive signs of continual improvement. The deflationary cycle appears to have come to an end when the Composite Consumer Price Index (CCPI) bottomed out with the CCPI rising 0.9% in July 2004. Labour market conditions improve with unemployment rate falling and wages moderately rising. An extended period of close-to-zero deposit rate coupled with returning inflation, though mild, will boost domestic consumption. With a much improved economic environment, it is expected that local consumption demand will continue to increase and retail sales continue to grow.

1.7 The opening of Hong Kong Disneyland in September 2005 and the completion of other tourist attractions in the coming years will add fuel to the retail sales rebound.

Manpower Situation in 2004

1.8 At the time of survey, a total of 202 888 (vs 205 592 in 2002) employees were engaged in the retail industry, of which 180 553 (89%) (vs 173 655 in 2002) made up the technical manpower and 22 335 (11%) (vs 31 937 in 2002) the non-technical manpower. Technical manpower refers to employees in principal jobs listed in Appendix 4 for which analysis is carried out in this report to show pertinent industrial needs. Non-technical manpower refers to employees in finance/accounting, human resources, IT, administrative and other supportive functions, which is not covered in this survey.

1.9 Of the 180 553 technical manpower engaged, 6 396 (3.5%) were managerial staff, 16 851 (9.3%) supervisory staff, 100 805 (55.8%) operative and clerical support staff, 25 007 (13.9%) part-time sales staff, and 31 494 (17.4%) owner/sole proprietor/working partner.

1.10 There were 4 083 vacancies reported at the time of the survey. **The total technical manpower, including vacancies, reached 184 636.**

Manpower Forecast for 2005 by Employers

1.11 Employers forecast the manpower demand in 2005 to be 188 324, representing an increase of 3 688 employees (+2%) over 2004.

1.12 Most of the 13 branches by company level forecast an increase of manpower in 2005. The branch of 'Consumer Goods' forecasts the biggest increase in terms of headcount, +1 556 employees (+3.6%). On the other hand, the 'Durable Goods' branch forecasts the biggest manpower growth by percentage, +6.2% (+559 employees) in 2005.

1.13 By job level, the demand for managerial staff increases by 3.8% (+247 employees), for supervisory staff increases by 2.5% (+426 employees) and for operative staff increases by 2.5% (+3 223 employees).

Manpower Forecast for 2005-07

Using the LMA Approach

1.14 The Labour Market Analysis (LMA) approach has been applied in forecasting manpower for the retail industry. Some 50 economic indicators have been tested in a statistical model to select the key determinants for their direct impact on the manpower of the industry. A description of the LMA approach and the key assumptions used are shown in paragraphs 2.17 – 2.18 of Section II. The projected manpower requirements for 2005 to 2007 are:

	<u>Actual Manpower</u>	<u>Manpower Projection</u>
2004	184 636	-
2005	-	186 361 (+1 725, +0.9% on 2004)
2006	-	192 055 (+5 694, +3.1% on 2005)
2007	-	197 577 (+5 522, +2.9% on 2006)

Training Needs

1.15 In face of the improving business environment and the rebounding retail sales, employers are investing more on staff training and development. As a continuous endeavour to upgrade the professionalism of employees and to provide high quality service, employers indicate that more training will be provided to their staff in 2005.

1.16 In 2004, a total of 138 213 training places were either provided or sponsored by employers. **The need for training places will further increase to 158 708 (+14.8%) in 2005.** While 53 145 places (33.5%) will be fulfilled by in-house training, 105 563 places (66.5%) will be required from external training bodies.

1.17 Of all training areas required, the top 3 most needed areas are ‘Customer Service’, ‘Selling Skills’ and ‘Store Operations’.

1.18 In addition to in-service training, more employers consider that pre-employment training for frontline sales staff is necessary or preferable. In 2004, 37.8% of employers rated pre-employment training as ‘Prerequisite’ or ‘Preferred’, up from 29.7% in 2002.

Source:

- (1) Hang Seng Economic Monthly, Nov/Dec 2004
- (2) Census and Statistics Department
- (3) Hong Kong Tourism Board

SECTION II

SUMMARY OF SURVEY FINDINGS

A. MANPOWER SITUATION IN 2004

Total Manpower

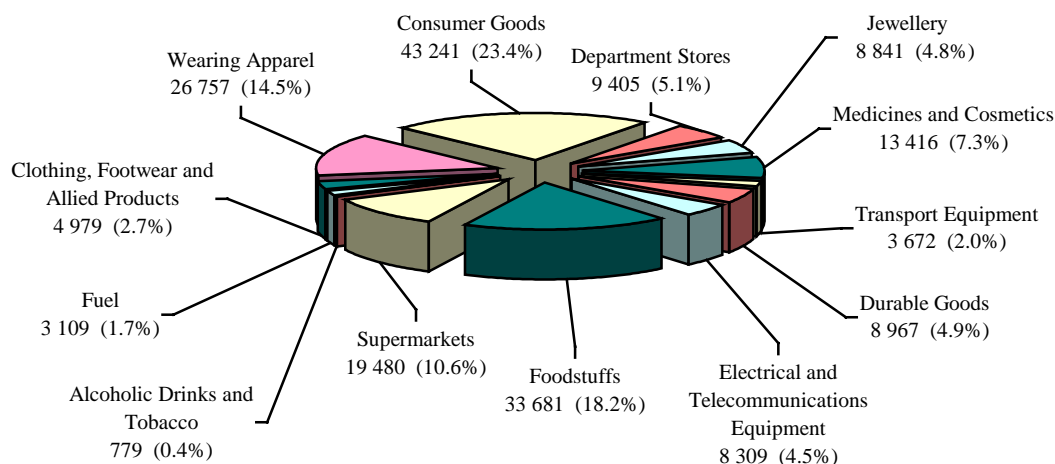
2.1 The survey revealed that a total of 202 888 persons were engaged in the retail industry, with 180 553 (89%) technical manpower and 22 335 (11%) non-technical manpower. Technical manpower refers to employees engaged in the principal jobs of the retail industry. A list of the principal jobs covered in the survey is attached as Appendix 4. Non-technical manpower, which refers to those working in the finance/accounting, human resources, IT, administrative and other supportive areas, is not covered in this survey. Hence, all employee numbers and vacancies appearing in this report refer to the technical manpower only. Detailed statistics are shown in Tables 1 to 5 of Section V.

Distribution of Manpower

2.2 The distribution of manpower by branch is shown below:

	Branch	Number Employed	Number of Vacancies	Total Manpower Demand
1.	Foodstuffs	33 088	593	33 681
2.	Supermarkets	19 238	242	19 480
3.	Alcoholic Drinks and Tobacco	759	20	779
4.	Fuel	3 106	3	3 109
5.	Clothing, Footwear and Allied Products	4 878	101	4 979
6.	Wearing Apparel	25 631	1 126	26 757
7.	Consumer Goods	42 086	1 155	43 241
8.	Department Stores	9 187	218	9 405
9.	Jewellery	8 710	131	8 841
10.	Medicines and Cosmetics	13 173	243	13 416
11.	Transport Equipment	3 625	47	3 672
12.	Durable Goods	8 864	103	8 967
13.	Electrical and Telecommunications Equipment	8 208	101	8 309
	Total	180 553	4 083	184 636

Figure 1: Manpower Demand by Branch

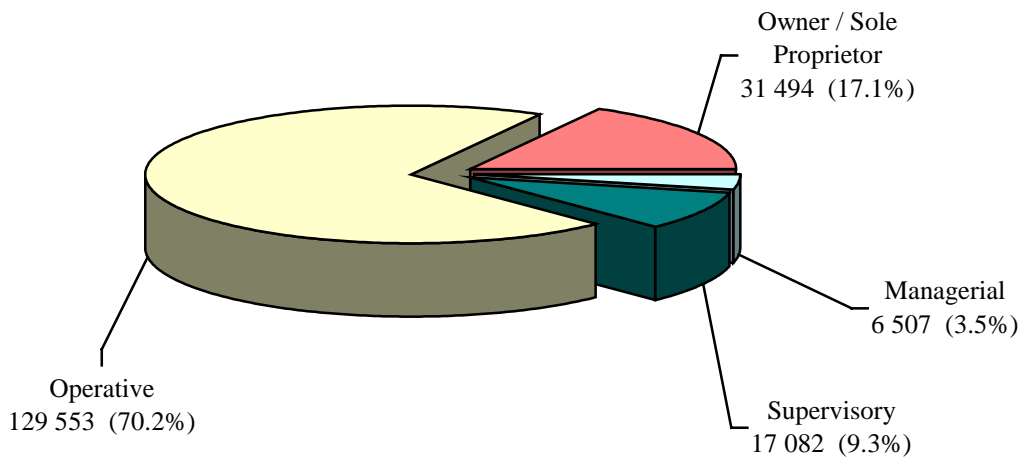


2.3 Of the 184 636 manpower demand, 6 507 (3.5%) were managerial staff, 17 082 (9.3%) supervisory staff, 129 553 (70.2%) operative & clerical support staff, and 31 494 (17.1%) owner / sole proprietor. The distribution of manpower by job level is shown below.

Manpower Distribution by Job Level

Job Level	Number Employed	Number of Vacancies	Total Manpower Demand
Managerial	6 396	111	6 507
Supervisory	16 851	231	17 082
Operative & Clerical Support	125 812	3 741	129 553
Owner / Sole Proprietor	31 494	0	31 494
Total	180 553	4 083	184 636

Figure 2: Manpower Demand by Job Level



2.4 The three principal jobs with the largest numbers of employees at each job level are shown below.

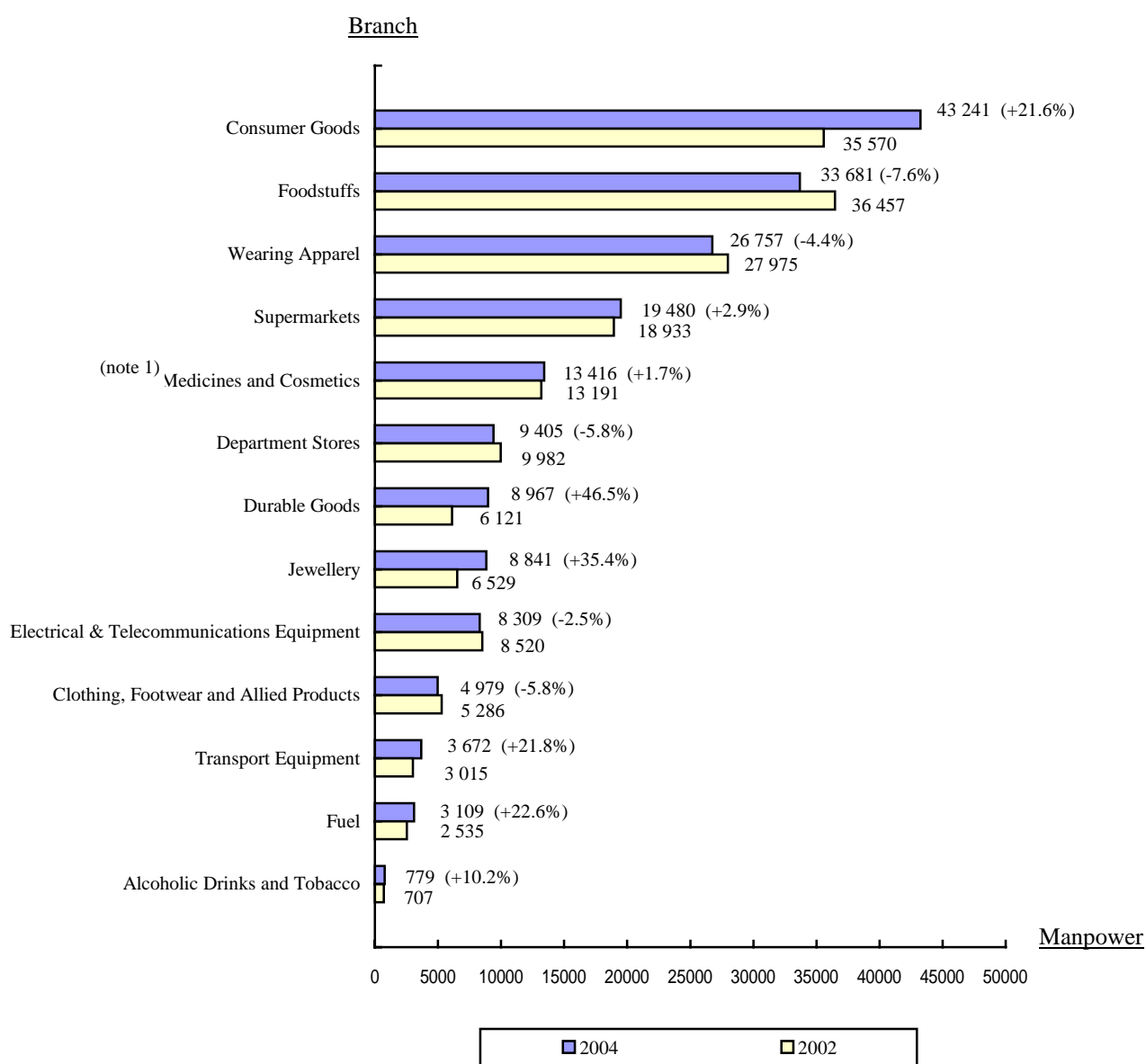
Job Level	Number of Employees	As % in the Respective Job Level
Managerial		
		<u>100%</u>
1. Store Manager	2 883	44.3%
2. Operations / Retail Manager	987	15.2%
3. District / Area Manager	705	10.8%
Supervisory		
		<u>100%</u>
1. Store Supervisor	14 676	85.9%
2. Merchandiser / Buyer	731	4.3%
3. Customer Services Supervisor	602	3.5%
Operative & Clerical Support		
		<u>100%</u>
1. Junior Sales Staff	61 674	47.6%
2. Senior Sales Staff	36 720	28.3%
3. Part Time Sales Staff	25 862	20%

Comparison of Manpower Demand in 2002 & 2004

2.5 In comparing the manpower demand for 2002 and 2004, it is important to note that the two surveys were conducted at different periods of the year. The 2002 survey was conducted in November to December, while the 2004 survey was conducted in September to October. November/December is the typical peak trading season in the retail industry. Hence, manpower level during this peak season is generally higher than other periods of the year. In 2003, the retail industry was badly hit by SARS. Employment numbers dropped as a result of the plunge of retail sales during the SARS period. Following the economic recovery in 2004, retail sales steadily increased and so did manpower demand.

2.6 In 2004, the total manpower demand increased to 184 636 (+5.6%, +9 815 employees) compared to 2002. Among the 13 branches, 8 branches registered an increase of manpower over 2002.

Figure 3: Manpower Comparison by Branch, 2002 & 2004

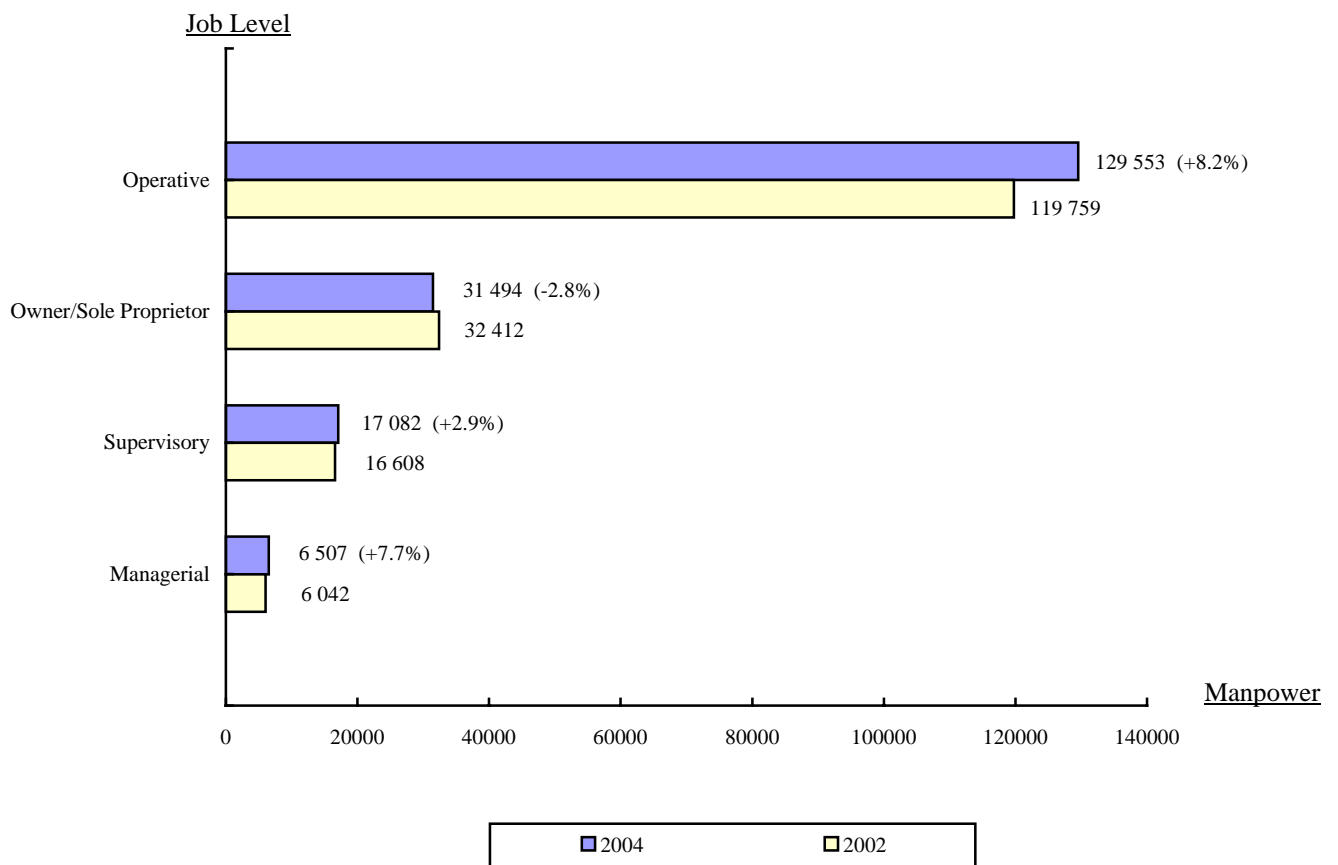


2.7 The progressive extension of the ‘Individual Travel Scheme’ and the subsequent influx of mainland tourists have benefited certain sectors of the retail industry. Branches which are more tourist-oriented, such as ‘Consumer Goods’, ‘Jewellery’, and ‘Medicines & Cosmetics’^(note 1), have recorded a double-digit manpower growth.

2.8 With the change of lifestyle, more consumers turn to supermarket shopping. Coupled with the fact that supermarkets take up an increasingly greater market share, the ‘Foodstuffs except Supermarkets’ branch registered a manpower decrease of 7.6%.

2.9 By job level, managerial, supervisory and operative levels all recorded manpower growth over 2002. The operative level exhibited the highest growth of 8.2% (+9 794 employees) when business improved and more frontline staff were required. It is worth to note that managerial level recorded a bigger growth of +7.7% than supervisory level +2.9%. The increase in employee numbers of the two levels stayed close at +465 for managers and +474 for supervisors. This might indicate that managerial staff was more needed to steer and drive the business during the retail sales recovery.

Figure 4: Manpower Comparison by Job Level, 2002 & 2004



Note 1 For the branch of ‘Medicines and Cosmetics’, in the 2002 survey due to significant changes in the employment size of some sample companies, which deviated from the original strata, the employee numbers had been overstated by around 2,000. If adjustment were made to the 2002 employee numbers, the 2004 manpower should be +19.9% over 2002.

B. FORECAST MANPOWER DEMAND

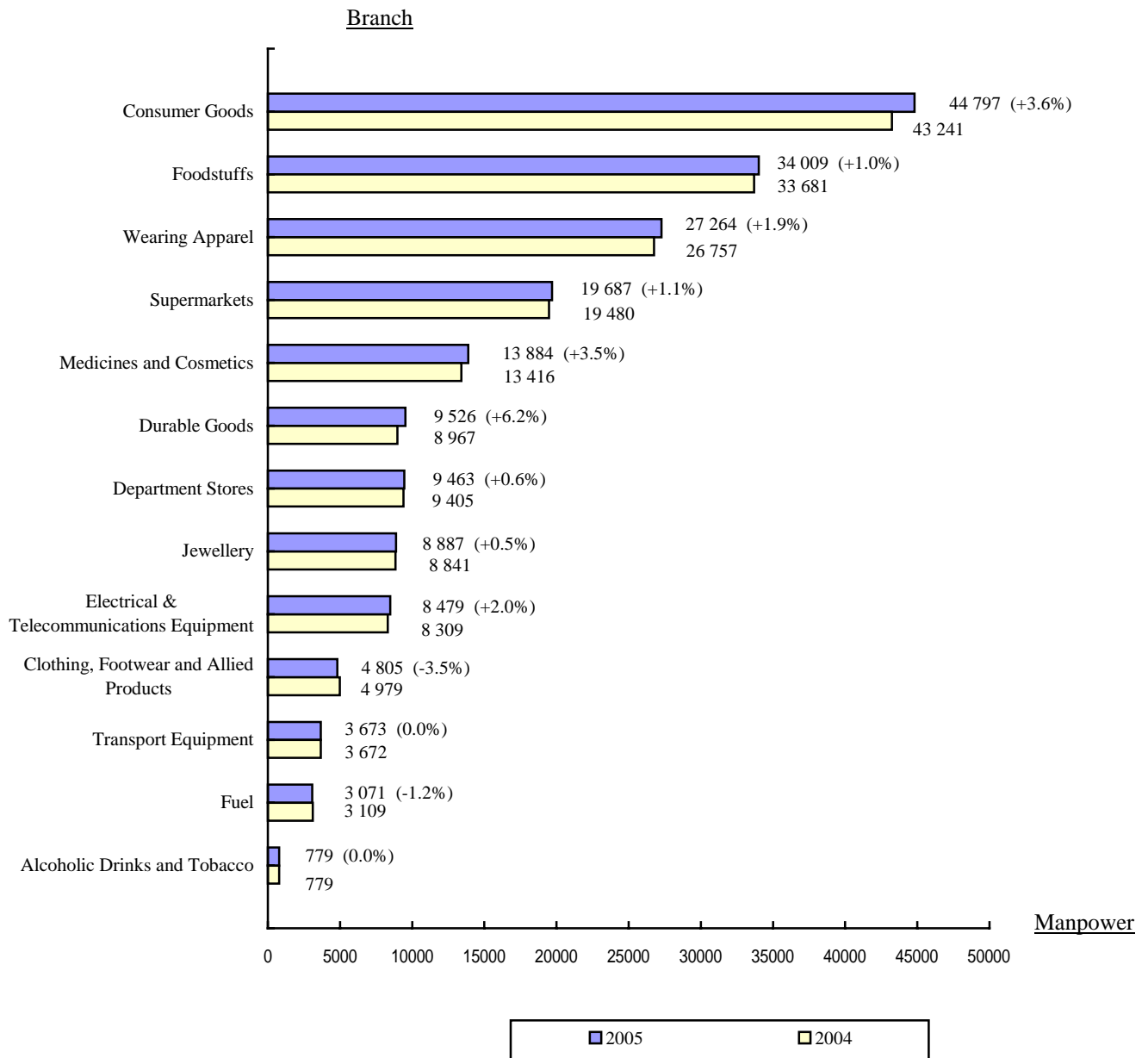
Employers' Forecast for 2005

2.10 The general business environment shows positive signs of continual improvement in 2005. The deflationary cycle comes to end and the Composite Consumer Price Index starts to rise. Labour market improves with unemployment rate falling and wages moderately rising. Retail sales steadily picks up as consumer confidence improves. For 2005, **employers forecast the manpower demand will grow by 2% to 188 324**, an increase of 3 688 employees over 2004.

Employers' Forecast Manpower for 2005

Branch	2004 Manpower Demand	2005 Forecast Demand	Changes
1. Foodstuffs	33 681	34 009	+328 (+1%)
2. Supermarkets	19 480	19 687	+207 (+1.1%)
3. Alcoholic Drinks and Tobacco	779	779	- (-)
4. Fuel	3 109	3 071	-38 (-1.2%)
5. Clothing, Footwear and Allied Products	4 979	4 805	-174 (-3.5%)
6. Wearing Apparel	26 757	27 264	+507 (+1.9%)
7. Consumer Goods	43 241	44 797	+1 556 (+3.6%)
8. Department Stores	9 405	9 463	+58 (+0.6%)
9. Jewellery	8 841	8 887	+46 (+0.5%)
10. Medicines and Cosmetics	13 416	13 884	+468 (+3.5%)
11. Transport Equipment	3 672	3 673	+1 (-)
12. Durable goods	8 967	9 526	+559 (+6.2%)
13. Electrical and Telecommunications Equipment	8 309	8 479	+170 (+2.0%)
Total	184 636	188 324	+3 688 (+2.0%)

Figure 5: Employers' Forecast Manpower for 2005 by Branch



2.11 As exhibited in Figure 5 above, 9 out of the 13 branches forecasted an increase of manpower in 2005. As consumer confidence picks up following the economic recovery, branches such as **‘Durable Goods’, ‘Consumer Goods’, ‘Medicines & Cosmetics’, and ‘Wearing Apparel’** forecasted a relatively higher manpower growth in terms of percentage increase or headcount compared to other branches.

2.12 For high valued products such as ‘Jewellery’ and ‘Transport Equipment’, their manpower had already increased by more than 20% in 2004 vs 2002. The manpower demand for these two branches appeared to be stabilized in 2005.

2.13 Employers' forecast manpower demand by job level is summarized below.

Job Level	2004 Manpower Demand	2005 Employers' Forecast Demand	Changes
Managerial	6 507	6 754	+247 (+3.8%)
Supervisory	17 082	17 508	+426 (+2.5%)
Operative	129 553	132 776	+3 223 (+2.5%)
Owner/Sole Proprietor	31 494	31 286	-208 (-0.7%)

2.14 Top 5 principal jobs with major increase in manpower demand are summarized below.

Principal Job	2004 Manpower Demand	2005 Employers' Forecast Demand	Increase
Store Manager	2 883	3 118	+235 (8.2%)
Store Supervisor	14 676	15 075	+399 (2.7%)
Senior Sales Staff	36 720	36 951	+231 (0.6%)
Junior Sales Staff	61 674	63 668	+1 994 (3.2%)
Part Time Sales Staff	25 862	26 827	+965 (3.7%)

2.15 At managerial level, 'Store Manager' remains the most sought-after job category, with demand increases by 8.2%, the highest growth rate amongst all the principal jobs.

2.16 Demand for full time 'Sales Staff' still tops the list with +2 225 employees forecasted in 2005. As a result of the manpower consolidation in recent years and the operational need to maintain flexible staffing, demand for 'Part Time Sales / Service Staff' continues to grow at a higher than overall rate (+3.7% for part time staff vs +2% for total manpower).

Manpower Forecast Using the LMA Approach

2.17 Apart from the employer's forecast, a labour market analysis (LMA) approach has been used to project manpower for the retail industry from 2005 to 2007. A description of the LMA approach is shown in Appendix 5. Some 50 economic indicators are tested in a statistical model to select the most important determinants for their direct impact on the manpower. Two Principal Components are identified and their assumptions are :

	Assumptions for		
	2005	2006	2007
Total Loans and Advances	+0.7%	+2%	+0.1%
Visitor Arrivals	+4.2%	+9.6%	+9.6%

2.18 Based on the statistical model, the manpower requirements for 2005 – 2007 are projected to be:

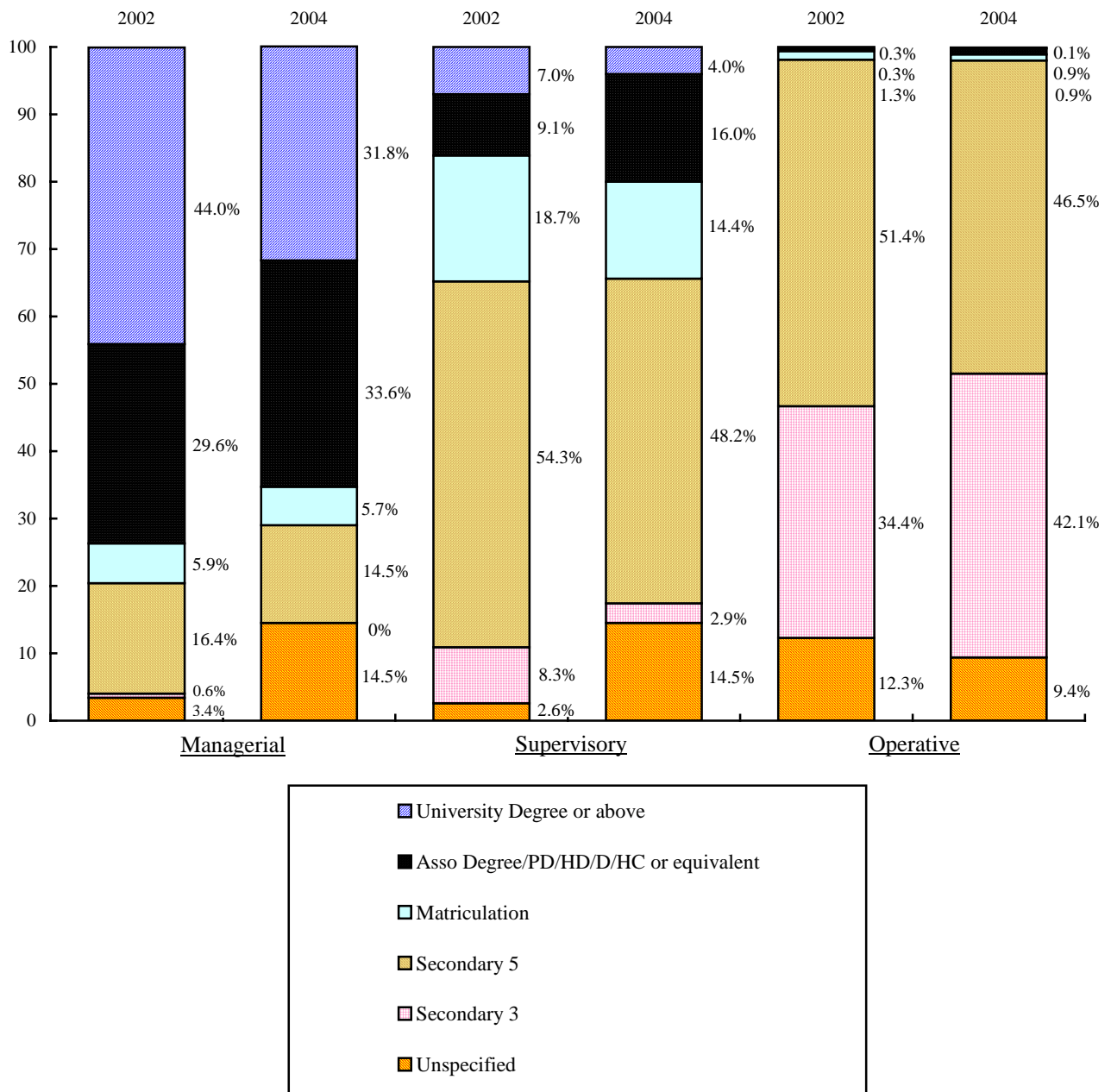
	Actual	Forecast
2004	184 636	-
2005	-	186 361 (+0.9% on 2004)
2006	-	192 055 (+3.1% on 2005)
2007	-	197 577 (+2.9% on 2006)

C. RECRUITMENT REQUIREMENTS

Preferred Level of Education of Employees

2.19 Employer's preferred education level of employees are summarized below. Detailed statistics are shown in Table 6 of Section V.

Figure 6: Preferred Education Level of Employees by Job Level



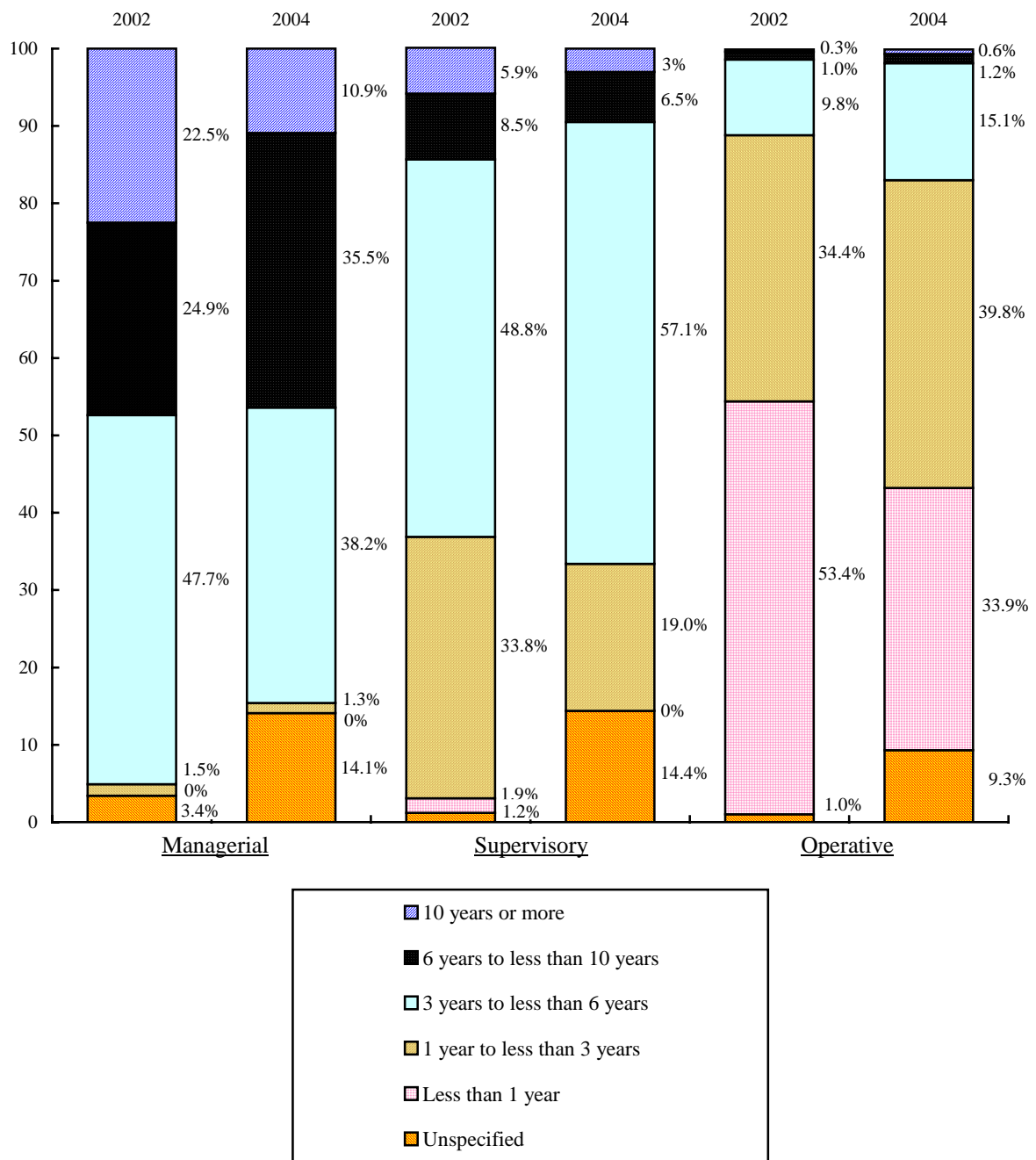
2.20 As shown in Figure 6 above, 31.8% of employers preferred managerial staff to have University or above education level, while 33.6% preferred sub-degree level, i.e. Associate Degree, Higher Diploma, Diploma. For supervisory staff, 4.0% of employers preferred University or above level, while 16% preferred sub-degree level.

2.21 Compared to 2002, there were more employers who preferred managerial and supervisory staff to have sub-degree level, and fewer employers preferred University level. For many retail companies, recruitment of managerial and supervisory staff has not been easy. When the overall economy improves and the retail sales rebound, recruitment difficulty might induce some employers to prefer sub-degree graduates. Employers also revealed in the survey that relevant retail experience carried more weight as a recruitment criteria.

Preferred Relevant Years of Experience

2.22 Employers' preferred relevant years of experience of employees are summarized below. Detailed statistics are shown in Table 7 of Section V.

Figure 7: Preferred Relevant Years of Experience by Job Level



2.23 Compared to 2002, less employers preferred managerial staff to have more than 10 years experience, but more employers preferred '6 to 10 years'.

2.24 The 2004 survey results might point to a gradual convergence towards the more commonly accepted requirement, i.e. '6 to 10 years' for managerial staff, and '3 to 6 years' for supervisory staff.

2.25 On the other hand, employers tended to raise their requirement on years of relevant experience for operative and part-time staff. More employers shifted from requiring 'less than 1 year experience' to '1 to 3 years' or '3 to 6 years' experience.

D. TRAINING REQUIREMENTS

Training Needs

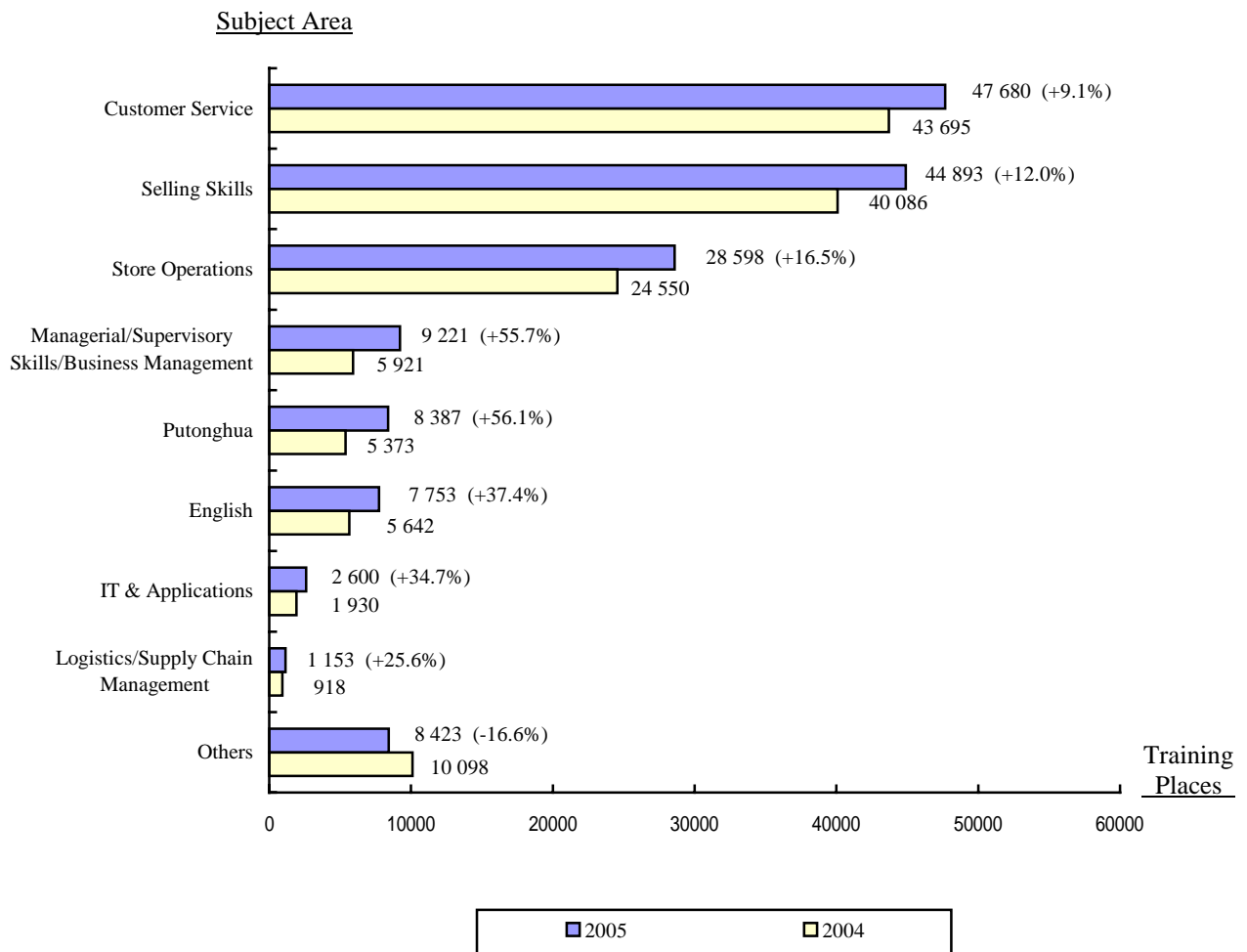
2.26 The survey revealed that a total of 138 213 training places were provided or sponsored by employers in 2004, an increase of 15.5% over 2002. As the retail sales rebounded, training for frontline competency such as 'Customer Service', 'Selling Skills', and 'Store Operations' registered the biggest increase in training places. Detailed statistics are shown in Tables 8 to 10 of Section V.

2.27 The **need for training places** would further **increase to 158 708 (+14.8%) in 2005**. While retail specific courses still stay on top of the list, demand for generic managerial and language training exhibits the highest increase by percentage. Need for managerial training increases by 55.7%, Putonghua training increases by 56.1%, and English training increases by 37.4%. This reveals that more employers see the needs to invest in human capital in order to upgrade the standard and professionalism of the retail workforce, and hence to stay ahead of the keen competition. Some companies also take 'training and development' as one of the staff retention measures.

Training Places Provided / Sponsored by Employers

Subject Area	2004	2005 Forecast	Changes
1. Managerial / Supervisory Skills / Business Management	5 921	9 221	+3 300 (+55.7%)
2. Customer Service	43 695	47 680	+3 985 (+9.1%)
3. Selling Skills	40 086	44 893	+4 807 (+12.0%)
4. Store Operations	24 550	28 598	+4 048 (+16.5%)
5. Logistics / Supply Chain Management	918	1 153	+235 (+25.6%)
6. IT & Applications	1 930	2 600	+670 (+34.7%)
7. Putonghua	5 373	8 387	+3 014 (+56.1%)
8. English	5 642	7 753	+2 111 (+37.4%)
9. Others	10 098	8 423	-1 675 (-16.6%)
Total	138 213	158 708	+20 495 (+14.8%)

Figure 8: Comparison of Training Needs by Subject Area

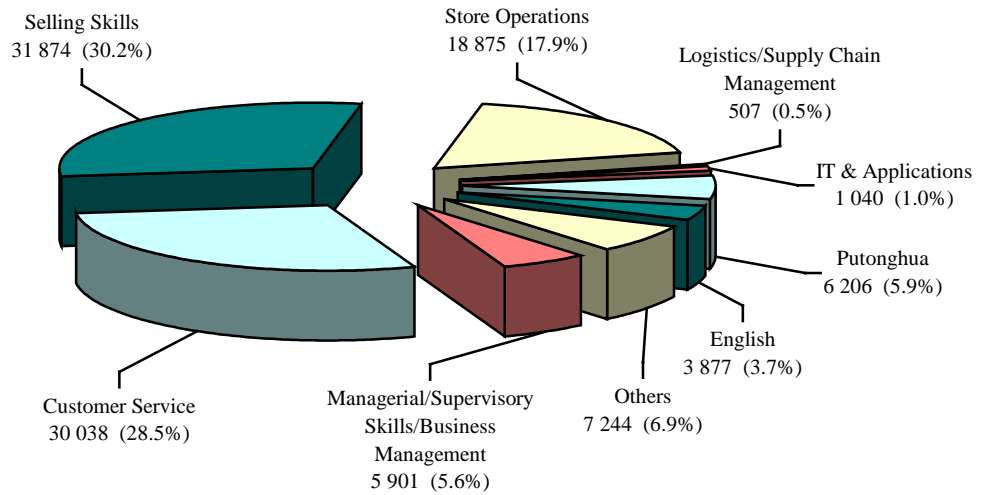


2.28 Of the 158 708 training places required in 2005, 53 145 places (33.5%) will be fulfilled by in-house training, 105 563 places (66.5%) will be required from external training bodies.

2.29 As for external training, the distribution of training places to be provided by external training bodies are:

Subject Areas	Training Places Needed
1. Selling Skills	31 874
2. Customer Service	30 038
3. Store Operations	18 875
4. Putonghua	6 206
5. Managerial / Supervisory Skills / Business Management	5 901
6. Others	12 669
Total	105 563

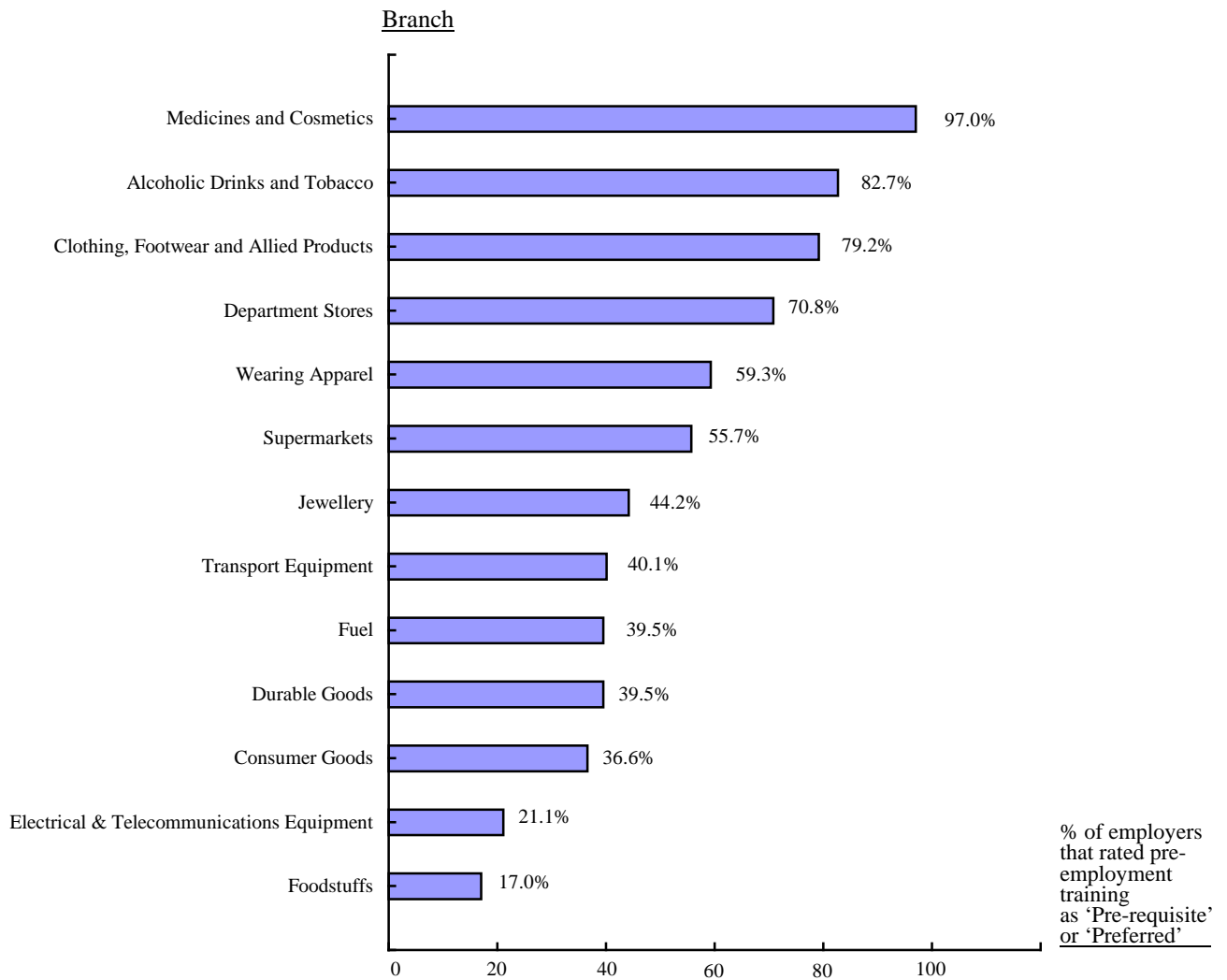
Figure 9 : Need for External Training Places by Subject Area



Pre-employment Training

2.30 Pre-employment training refers to training provided to people before they enter the workforce or before they are employed in a particular industry. As customer expectation is ever rising and the business competition getting increasingly tough, more employers (37.8% in 2004 vs 29.7% in 2002) believed that pre-employment training was either a ‘Pre-requisite’ or ‘Preferred’. Detailed statistics are shown in Tables 11 and 12 of Section V.

Figure 10: Needs for Pre-employment Training for Frontline Sales Staff by Branch, 2004



2.31 Pre-employment training is most needed in the following areas :

Subject Areas	Pre-employment Training Needed as either 'Pre-requisite' or 'Preferred'
1. Customer Service	96.2%
2. Selling Skills	94.5%
3. Interpersonal Skills	76.0%
4. Handling Complaints	71.8%

2.32 Consistent with the training needs for in-service employees, pre-employment training is most needed in the areas of 'Customer Service' and 'Selling Skills'. This again points to the growing requirement to upgrade the professionalism and service quality of frontline employees in order to sustain competitive edge in the industry.

SECTION III

RECOMMENDATIONS

A. TRAINING NEEDS

3.1 Based on the requirement of in-service training to be provided by external training bodies, the Retail Trade Training Board (Training Board) recommends the training places by subject area as follows:

Subject Areas	Training Places
Managerial / supervisory skills training	5 900
Retail specific skills training	80 000
Languages training	10 000
Total	95 900

3.2 To match with the training needs as indicated by employers, the Training Board recommends:

1. Training institutions and course providers to provide **generic courses** in areas such as customer service, selling skills, managerial/ supervisory skills, Putonghua and English to in-service employees in the industry.
2. Training institutions and course providers to review the specific training needs of different branches and provide **specialized courses** to meet their needs.
3. The Government continues to operate the **Skills Upgrading Scheme (SUS)** for retail industry since most of the training needs identified are being covered in the SUS courses.
4. **Pre-employment training at sub-degree level** to be provided to junior supervisory and sales staff to get them better equipped for taking up employment in the industry. This aligns with the survey findings that more employers prefer supervisory staff to have sub-degree education and more employers rate pre-employment training as preferred .

3.3 The Training Board also recommends employers to provide / sponsor more training to employees as a continuous endeavour to upgrade the professionalism of the retail industry.

B. FUTURE SURVEYS

3.4 The Training Board recommends that **manpower surveys** should continue to be **conducted once every two years**.

3.5 The Training Board also recommends the major enhancements introduced in the 2002 and 2004 surveys to serve as a benchmark for future surveys so that the manpower requirements and training needs of different branches, and the latest employment trend of the industry can be better identified.

SECTION IV

SCOPE AND METHODOLOGY OF SURVEY

A. RETAIL TRADE TRAINING BOARD

The Training Board

4.1 The Retail Trade Training Board of the Vocational Training Council is appointed by the HKSAR Government to be responsible for, among other duties, assessing the manpower situation and training needs in the retail trade and to recommend to the Vocational Training Council measures to meet these needs. Its terms of reference and membership are given in Appendices 1 & 2.

Working Group on the Manpower Survey

4.2 The Training Board has established a Working Group to manage and guide the survey. Membership of the Working Group is given in Appendix 3.

Benchmark

4.3 The 2004 survey has adopted as benchmark the major enhancements introduced in the 2002 survey, which were :

- (a) Sampling method and data collection process have been fine-tuned.
- (b) The survey was conducted by branch and major sub-branch levels with 13 specified branches.
- (c) The survey was conducted at company level.
- (d) The list of principal jobs has been updated and principal jobs classified more appropriately according to their main duties.
- (e) Full time and part time staff were differentiated, "Part Time Sales / Service Staff" was classified as one of the principal jobs.

4.4 The Training Board considers that the above enhancements better serve the purpose of identifying the manpower requirements and training needs of the retail industry.

B. SCOPE AND PROCEDURES

Scope of the Survey

4.5 Out of the 45 034 registered companies in the retail industry, 640 companies were selected by a stratified random sampling method. The survey was conducted by 13 branches at company level with the following coverage:

Branch	Sample Size
1. Foodstuffs	101
2. Supermarkets	23
3. Alcoholic Drinks and Tobacco	18
4. Fuel	40
5. Clothing, Footwear and Allied Products	41
6. Wearing Apparel	104
7. Consumer Goods	92
8. Department Stores	27
9. Jewellery	38
10. Medicines and Cosmetics	35
11. Transport Equipment	37
12. Durable Goods	43
13. Electrical and Telecommunications Equipment	41
Total	640

Procedures of the Survey

4.6 The fieldwork took place from 1st September to 5th October 2004 with follow-up cases completed on 15th November 2004.

4.7 Questionnaires with explanatory notes and job descriptions were sent to the sampled companies two weeks before the fieldwork. The survey documents are attached as Appendix 4.

4.8 Survey interviewing officers from the Census and Statistics Department (C&SD) visited the sampled companies to ensure proper collection of information. The completed questionnaires were checked, coded and where necessary verified with the respondents. The survey data were then processed and tabulated by the C&SD.

Response Rate

4.9 Of the 640 companies selected, 528 completed questionnaires were collected. While 16 companies refused to respond, the other 96 companies had either closed, moved, merged or changed business. The effective response rate was 97.1%.

SECTION V

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2004 Retail Trade Manpower Survey

Table 1 : Numbers of Companies, Employees, Vacancies and Total Manpower Demand by Branch

	Branch	Number of Companies	No. of Employees at Date of Survey	No. of Vacancies at Date of Survey	Total Manpower Demand (Numbers Employed + Vacancies)	Employers' Forecast for 2005	Changes on 2004	Changes (%)
1	Foodstuffs except Supermarkets	11 184	33 088	593	33 681	34 009	328	1.0%
2	Supermarkets	203	19 238	242	19 480	19 687	207	1.1%
3	Alcoholic Drinks and Tobacco	75	759	20	779	779	0	0.0%
4	Fuel	314	3 106	3	3 109	3 071	- 38	-1.2%
5	Clothing, Footwear and Allied Products except Wearing Apparel	1 085	4 878	101	4 979	4 805	- 174	-3.5%
6	Wearing Apparel	6 222	25 631	1 126	26 757	27 264	507	1.9%
7	Consumer Goods, n.e.c. except Department Stores, Jewellery, Medicines and Cosmetics	11 483	42 086	1 155	43 241	44 797	1 556	3.6%
8	Department Stores	24	9 187	218	9 405	9 463	58	0.6%
9	Jewellery (incl. Imitation Jewellery)	2 026	8 710	131	8 841	8 887	46	0.5%
10	Medicines and Cosmetics	1 050	13 173	243	13 416	13 884	468	3.5%
11	Transport Equipment	997	3 625	47	3 672	3 673	1	0.0%
12	Durable Goods, n.e.c. except Telecommunications Equipment other than Telephone System and Electrical Goods other than Machinery, Office Equipment and Appliances	2 189	8 864	103	8 967	9 526	559	6.2%
13	Telecommunications Equipment other than Telephone System and Electrical Goods other than Machinery, Office Equipment and Appliances	1 417	8 208	101	8 309	8 479	170	2.0%
	Total	38 269	180 553	4 083	184 636	188 324	3 688	2.0%

2004 Retail Trade Manpower Survey
Table 2 : Distribution of Employees by Branch and Job Level

	Branch	Managerial	Supervisory	Operative	Owner/Sole Proprietor	Branch Total	% to Total
1	Foodstuffs, except Supermarkets	297	1 462	22 834	8 495	33 088	18.3%
2	Supermarkets	956	2 431	15 645	206	19 238	10.7%
3	Alcoholic Drinks and Tobacco	53	88	585	33	759	0.4%
4	Fuel	98	304	2 566	138	3 106	1.7%
5	Clothing, Footwear & Allied Products, except Wearing Apparel	135	833	3 487	423	4 878	2.7%
6	Wearing Apparel	1 079	2 691	16 519	5 342	25 631	14.2%
7	Consumer Goods, except Department Stores, Jewellery, Medicines & Cosmetics	920	3 593	28 120	9 453	42 086	23.3%
8	Department Stores	489	1 432	7 265	1	9 187	5.1%
9	Jewellery	480	612	5 676	1 942	8 710	4.8%
10	Medicines and Cosmetics	930	1 434	9 650	1 159	13 173	7.3%
11	Transport Equipment	226	164	2 297	938	3 625	2.0%
12	Durable Goods, except Telecommunications Equipment other than Telephone System and Electrical Goods other than Machinery, Office Equipment and Appliances	300	767	5 753	2 044	8 864	4.9%
13	Telecommunications Equipment other than Telephone System and Electrical Goods other than Machinery, Office Equipment and Appliances	433	1 040	5 415	1 320	8 208	4.5%
	Total	6 396	16 851	125 812	31 494	180 553	100.0%

2004 Retail Trade Manpower Survey
Table 3 : 2002 and 2004 Manpower Comparison by Branch

	Branch	2002 Total Manpower Demand	2004 Total Manpower Demand	2004 vs 2002	2005 Forecast	2005 vs 2004
1	Foodstuffs except Supermarkets	36 457	33 681	-7.6%	34 009	1.0%
2	Supermarkets	18 933	19 480	2.9%	19 687	1.1%
3	Alcoholic Drinks and Tobacco	707	779	10.2%	779	0.0%
4	Fuel	2 535	3 109	22.6%	3 071	-1.2%
5	Clothing, Footwear and Allied Products except Wearing Apparel	5 286	4 979	-5.8%	4 805	-3.5%
6	Wearing Apparel	27 975	26 757	-4.4%	27 264	1.9%
7	Consumer Goods, n.e.c. except Department Stores, Jewellery, Medicines and Cosmetics	35 570	43 241	21.6%	44 797	3.6%
8	Department Stores	9 982	9 405	-5.8%	9 463	0.6%
9	Jewellery (incl. Imitation Jewellery)	6 529	8 841	35.4%	8 887	0.5%
10	Medicines and Cosmetics ^(Note)	13 191	13 416	1.7%	13 884	3.5%
11	Transport Equipment	3 015	3 672	21.8%	3 673	0.0%
12	Durable Goods, n.e.c. except Telecommunications Equipment other than Telephone System and Electrical Goods other than Machinery, Office Equipment and Appliances	6 121	8 967	46.5%	9 526	6.2%
13	Telecommunications Equipment other than Telephone System and Electrical Goods other than Machinery, Office Equipment and Appliances	8 520	8 309	-2.5%	8 479	2.0%
	Total	174 821	184 636	5.6%	188 324	2.0%

Note : For Branch 10, due to significant changes in the employment size of some sampled companies, which deviated from the original strata, the manpower had been overstated by around 2,000 in the 2002 survey. Hence, the 2004 manpower should be +19.9% on 2002, instead of +1.7%

2004 Retail Trade Manpower Survey

Table 4 : Number of Employees, Vacancies and Total Manpower Demand by Job

Job Code	Job	2004			Forecast for 2005		
		No. of Employees at Date of Survey	No. of Vacancies at Date of Survey	Total Manpower Demand (Numbers Employed + Vacancies)	Employers' Forecast for 2005	Changes on 2004	Changes (%)
Managerial							
111	General Manager	463	0	463	463	0	0.0%
112	Operations / Retail Manager	981	6	987	990	3	0.3%
113	District / Area Manager	688	17	705	690	- 15	-2.1%
114	Store Manager	2 822	61	2 883	3 118	235	8.2%
115	Marketing Manager	276	24	300	300	0	0.0%
116	Sales Manager	314	1	315	316	1	0.3%
117	Customer Services Manager	105	0	105	105	0	0.0%
118	Head of Merchandising / Buying Manager	513	1	514	536	22	4.3%
119	Logistics / Distribution / Warehouse Manager	168	1	169	170	1	0.6%
120	Training Manager	28	0	28	28	0	0.0%
199	Other Managers	38	0	38	38	0	0.0%
	Sub Total	6 396	111	6 507	6 754	247	3.8%
Supervisory							
211	Store Supervisor	14 484	192	14 676	15 075	399	2.7%
212	Visual Merchandising Supervisor	162	6	168	170	2	1.2%
213	Logistics / Distribution / Warehouse Supervisor	411	1	412	414	2	0.5%
214	Public Relations Officer / Advertising Officer	214	5	219	219	0	0.0%
215	Customer Services Supervisor	601	1	602	622	20	3.3%
216	Merchandiser / Buyer	705	26	731	733	2	0.3%
217	Training Officer	96	0	96	97	1	1.0%
299	Other Supervisors	178	0	178	178	0	0.0%
	Sub Total	16 851	231	17 082	17 508	426	2.5%
Operative							
311	Senior Sales Staff	36 557	163	36 720	36 951	231	0.6%
312	Junior Sales Staff	59 007	2 667	61 674	63 668	1 994	3.2%
313	Stock / Purchasing Clerk	1 400	9	1 409	1 406	- 3	-0.2%
314	Stock Assistant	3 288	39	3 327	3 363	36	1.1%
399	Other Clerks / Supportive Staff	553	8	561	561	0	0.0%
411	Part Time Sales / Service Staff	25 007	855	25 862	26 827	965	3.7%
	Sub Total	125 812	3 741	129 553	132 776	3 223	2.5%
198	Owner / Sole Proprietor / Working Partner	31 494	0	31 494	31 286	- 208	-0.7%
	Total	180 553	4 083	184 636	188 324	3 688	2.0%

2004 Retail Trade Manpower Survey
Table 5 : 2002 and 2004 Manpower Comparison by Job

Job Code	Job	2002 Total Manpower Demand	2004 Total Manpower Demand	2004 vs 2002	2005 Forecast	2005 vs 2004
Managerial						
111	General Manager	417	463	11.0%	463	0.0%
112	Operations / Retail Manager	954	987	3.5%	990	0.3%
113	District / Area Manager	464	705	51.9%	690	-2.1%
114	Store Manager	2 936	2 883	-1.8%	3118	8.2%
115	Marketing Manager	284	300	5.6%	300	0.0%
116	Sales Manager	361	315	-12.7%	316	0.3%
117	Customer Services Manager	70	105	50.0%	105	0.0%
118	Head of Merchandising / Buying Manager	388	514	32.5%	536	4.3%
119	Logistics / Distribution / Warehouse Manager	145	169	16.6%	170	0.6%
120	Training Manager	-	28	NA	28	0.0%
199	Other Managers	23	38	65.2%	38	0.0%
	Sub Total	6 042	6 507	7.7%	6 754	3.8%
Supervisory						
211	Store Supervisor	14 042	14 676	4.5%	15075	2.7%
212	Visual Merchandising Supervisor	179	168	-6.1%	170	1.2%
213	Logistics / Distribution / Warehouse Supervisor	433	412	-4.8%	414	0.5%
214	Public Relations Officer / Advertising Officer	579	219	-62.2%	219	0.0%
215	Customer Services Supervisor	357	602	68.6%	622	3.3%
216	Merchandiser / Buyer	920	731	-20.5%	733	0.3%
217	Training Officer	-	96	NA	97	1.0%
299	Other Supervisors	98	178	81.6%	178	0.0%
	Sub Total	16 608	17 082	2.9%	17 508	2.5%
Operative						
311	Senior Sales Staff	46 723	36 720	-21.4%	36951	0.6%
312	Junior Sales Staff	48 773	61 674	26.5%	63668	3.2%
313	Stock / Purchasing Clerk	1 886	1 409	-25.3%	1406	-0.2%
314	Stock Assistant	2 384	3 327	39.6%	3363	1.1%
399	Other Clerks / Supportive Staff	782	561	-28.3%	561	0.0%
411	Part Time Sales / Service Staff	19 211	25 862	34.6%	26827	3.7%
	Sub Total	119 759	129 553	8.2%	132 776	2.5%
198	Owner / Sole Proprietor / Working Partner	32 412	31 494	-2.8%	31286	-0.7%
	Total	174 821	184 636	5.6%	188 324	2.0%

2004 Retail Trade Manpower Survey
Table 6 : Preferred Education of Employees By Job

Job	University Degree or above	Associate Degree / Professional Diploma / Higher Diploma / Higher Certificate or equivalent	Diploma / Certificate or equivalent	Matriculation	Secondary 5	Secondary 3	Unspecified	Total
Managerial Level								
General Manager	303	91	5	3	27	0	34	463
Operations / Retail Manager	473	132	247	40	39	0	50	981
District / Area Manager	157	203	126	32	53	0	117	688
Store Manager	324	475	568	258	702	0	495	2 822
Marketing Manager	195	23	9	1	7	0	41	276
Sales Manager	192	49	22	9	25	0	17	314
Customer Services Manager	50	2	8	1	1	0	43	105
Head of Merchandising / Buying Manager	236	109	27	8	37	0	96	513
Logistics / Distribution / Warehouse Manager	66	17	22	10	28	0	25	168
Training Manager	23	2	0	1	0	0	2	28
Sub Total	2 019	1 103	1 034	363	919	0	920	6 358
Supervisory Level								
Store Supervisor	312	265	1 853	2 259	7 064	478	2 253	14 484
Visual Merchandising Supervisor	17	26	61	9	20	0	29	162
Logistics / Distribution / Warehouse Supervisor	39	23	84	28	206	3	28	411
Public Relations Officer / Advertising Officer	71	20	82	7	21	0	13	214
Customer Services Supervisor	28	3	29	35	463	0	43	601
Merchandiser / Buyer	156	71	148	47	229	7	47	705
Training Officer	41	7	1	12	27	1	7	96
Sub Total	664	415	2 258	2 397	8 030	489	2 420	16 673
Operative Level								
Senior Sales Staff	8	5	590	772	18 577	9 000	7 605	36 557
Junior Sales Staff	36	14	528	334	30 837	23 611	3 647	59 007
Part Time Sales Staff	0	0	15	0	6 661	17 979	352	25 007
Stock / Purchasing Clerk	20	0	23	30	1 220	66	41	1 400
Stock Assistant	0	0	0	0	1 007	2 111	170	3 288
Sub Total	64	19	1 156	1 136	58 302	52 767	11 815	125 259

2004 Retail Trade Manpower Survey

Table 7 : Preferred Relevant Years of Experience of Employees By Job

Job	More than 10 years	6 - 10 years	3 - 6 years	1 - 3 years	Less than 1 year	Unspecified	Total
Managerial Level							
General Manager	180	200	50	1	0	32	463
Operations / Retail Manager	157	410	363	8	0	43	981
District / Area Manager	109	226	230	6	0	117	688
Store Manager	126	803	1 378	31	0	484	2 822
Marketing Manager	31	108	90	6	0	41	276
Sales Manager	19	177	101	0	0	17	314
Customer Services Manager	4	39	18	1	0	43	105
Head of Merchandising / Buying Manager	42	218	130	28	0	95	513
Logistics / Distribution / Warehouse Manager	22	60	59	2	0	25	168
Training Manager	2	14	10	0	0	2	28
Sub Total	692	2 255	2 429	83	0	899	6 358
Supervisory Level							
Store Supervisor	443	815	8 597	2 395	0	2 234	14 484
Visual Merchandising Supervisor	1	15	75	42	0	29	162
Logistics / Distribution / Warehouse Supervisor	27	59	168	129	0	28	411
Public Relations Officer / Advertising Officer	3	14	122	62	0	13	214
Customer Services Supervisor	1	9	292	256	0	43	601
Merchandiser / Buyer	23	165	227	243	0	47	705
Training Officer	0	4	47	38	0	7	96
Sub Total	498	1 081	9 528	3 165	0	2 401	16 673
Operative Level							
Senior Sales Staff	780	1 235	17 581	7 022	2 380	7 559	36 557
Junior Sales Staff	0	298	1 011	33 984	20 196	3 518	59 007
Part Time Sales Staff	0	7	54	6 512	18 082	352	25 007
Stock / Purchasing Clerk	0	0	135	1 035	190	40	1 400
Stock Assistant	0	0	155	1 343	1 620	170	3 288
Sub Total	780	1 540	18 936	49 896	42 468	11 639	125 259

2004 Retail Trade Manpower Survey

Table 8 : Number of Training Places Provided / Sponsored by Employers in the Past 12 Months By Job Level

Subject Areas	Managerial & Supervisory	Operative	Total	Forecast for 2005	2005 vs 2004
Managerial Training					
Managerial / Supervisory Skills / Business Management	5 330	591	5 921	9 221	55.7%
Functional Training					
Customer Service	4 678	39 017	43 695	47 680	9.1%
Selling Skills	3 530	36 556	40 086	44 893	12.0%
Store Operations	4 225	20 325	24 550	28 598	16.5%
Logistics / Supply Chain Management	677	241	918	1 153	25.6%
IT & Applications	779	1 151	1 930	2 600	34.7%
Languages					
Putonghua	1 111	4 262	5 373	8 387	56.1%
English	1 469	4 173	5 642	7 753	37.4%
Others					
	2 982	7 116	10 098	8 423	-16.6%
Total	24 781	113 432	138 213	158 708	14.8%

2004 Retail Trade Manpower Survey

Table 9 : Forecast Number of Training Places to be Provided / Sponsored by Employers in the Next 12 Months by Job Level

Subject Areas	Managerial & Supervisory	Operative	Total	% of Training Places to be Provided Internally	% of Training Places to be Provided Externally	External Training Places Required
Managerial Training						
Managerial / Supervisory Skills / Business Management	6 636	2 585	9 221	36%	64%	5 901
Functional Training						
Customer Service	6 218	41 462	47 680	37%	63%	30 038
Selling Skills	4 456	40 437	44 893	29%	71%	31 874
Store Operations	5 653	22 945	28 598	34%	66%	18 875
Logistics / Supply Chain Management	875	278	1 153	56%	44%	507
IT & Applications	979	1 621	2 600	60%	40%	1 040
Languages						
Putonghua	1 444	6 943	8 387	26%	74%	6 206
English	1 573	6 180	7 753	50%	50%	3 877
Others						
	2 433	5 990	8 423	14%	86%	7 244
Total	30 267	128 441	158 708	33.5%	66.5%	105 563

2004 Retail Trade Manpower Survey

Table 10 : 2002 and 2004 Comparison of Training Places Provided / Sponsored by Employers

Subject Areas	2002	2004	2004 vs 2002	2005 Forecast	2005 vs 2004
Managerial Training					
Managerial / Supervisory Skills / Business Management	9 666	5 921	-38.7%	9 221	55.7%
Functional Training					
Customer Service	30 612	43 695	42.7%	47 680	9.1%
Selling Skills	23 911	40 086	67.6%	44 893	12.0%
Store Operations	19 291	24 550	27.3%	28 598	16.5%
Logistics / Supply Chain Management	1 129	918	-18.7%	1 153	25.6%
IT & Applications	3 385	1 930	-43.0%	2 600	34.7%
Languages					
Putonghua	5 895	5 373	-8.9%	8 387	56.1%
English	4 650	5 642	21.3%	7 753	37.4%
Others					
	21 129	10 098	-52.2%	8 423	-16.6%
Total	119 668	138 213	15.5%	158 708	14.8%

2004 Retail Trade Manpower Survey

Table 11 : Needs for Pre-employment Training for Frontline Sales Staff By Branch

	Branch	Pre-requisite	Preferred	No comment	Not necessary	Unspecified	Total
1	Foodstuffs except Supermarkets	11	1 893	3 846	5 181	253	11 184
2	Supermarkets	5	108	0	90	0	203
3	Alcoholic Drinks and Tobacco	24	38	13	0	0	75
4	Fuel	30	94	114	76	0	314
5	Clothing, Footwear and Allied Products except Wearing Apparel	9	850	214	7	5	1 085
6	Wearing Apparel	679	3 013	1 493	1 022	15	6 222
7	Consumer Goods, n.e.c. except Department Stores, Jewellery, Medicines and Cosmetics	1 817	2 387	4 008	3 266	5	11 483
8	Department Stores	7	10	3	1	3	24
9	Jewellery (incl. Imitation Jewellery)	15	880	706	424	1	2 026
10	Medicines and Cosmetics	388	631	8	22	1	1 050
11	Transport Equipment	3	397	583	13	1	997
12	Durable Goods, n.e.c. except Tele. Equipment other than Telephone System and Elec. Goods other than Machinery, Office Equipment and Appliances	65	799	521	794	10	2 189
13	Telecommunications Equipment other than Telephone System and Electrical Goods other than Machinery, Office Equipment and Appliances	12	287	882	229	7	1 417
	Total	3 065	11 387	12 391	11 125	301	38 269

2004 Retail Trade Manpower Survey

Table 12 : Needs for Pre-employment Training By Subject Area

	Subject Areas	Very Important	Important	Not Very Important	Not necessary	Total
1	Customer Service	6 587	7 313	300	252	14 452
2	Handling Complaints	1 921	8 449	3 645	437	14 452
3	Selling Skills	5 470	8 190	792	0	14 452
4	Interpersonal Skills	2 130	8 847	2 587	888	14 452
5	Putonghua	1 655	7 278	5 147	372	14 452
6	English	1 310	7 038	5 048	1 056	14 452
7	Others	507	212	0	0	719
	Total	19 580	47 327	17 519	3 005	

VOCATIONAL TRAINING COUNCIL

Terms of Reference of Training Boards

1. To determine the manpower demand of the industry, including the collection and analysis of relevant manpower and student/trainee statistics and information on socio-economic, technological and labour market developments.
2. To assess and review whether the manpower supply for the industry matches with the manpower demand.
3. To recommend to the Vocational Training Council the development of vocational education and training facilities to meet the assessed manpower demand.
4. To advise the Hong Kong Institute of Vocational Education (IVE) and training & development centres on the direction and strategic development of their programmes in the relevant disciplines.
5. To advise on the course planning, curriculum development and quality assurance systems of the IVE and training & development centres.
6. To prescribe job specifications for the principal jobs in the industry defining the skills, knowledge and training required.
7. To advise on training programmes for the principal jobs in the industry specifying the time a trainee needs to spend on each skill elements.
8. To tender advice in respect of skill assessments, trade tests and certification for in-service workers, apprentices and trainees, for the purpose of ascertaining that the specified skill standards have been attained.
9. To advise on the conduct of skill competitions in key trades in the industry for the promotion of vocational education and training as well as participation in international competitions.
10. To liaise with relevant bodies on matters pertaining to the development and promotion of vocational education and training in the industry, including employers, employers' associations, trade unions, professional institutions, training and educational institutions and government departments.
11. To organize seminars/conferences/symposia on vocational education and training for the industry.
12. To advise on the publicity relating to the activities of the Training Board and relevant vocational education and training programmes of the VTC.
13. To submit to the Council an annual report on the Training Board's work and its recommendations on the strategies for programmes in the relevant disciplines.
14. To undertake any other functions delegated by the Council in accordance with Section 7 of the Vocational Training Council Ordinance.

**Retail Trade Training Board
Membership List**

Chairman

Ms MAK Sui-king, Caroline (nominated by a major chain store)

Members

Miss Anita Bagaman (nominated by The Hong Kong Retail Management Association)

Mr CHENG Nai-yan (nominated by The Hong Kong Department Stores and Commercial Staff General Union)

Mr CHOW Lok-shing, Lawrence (nominated by a jewellery chain)

Mr JIM Tak-hing (nominated by a major chain store)

Mr KUNG Yue-fei, Philip (ad personam)

Mr YU Pang-chun, JP (nominated by The Hong Kong Retail Management Association)

Mr KWOK Kai-hing, Daniel (Representative of The Executive Director of the Vocational Training Council)

Secretary

Ms YAM Ying-sim, Gladys (The Vocational Training Council)

**Working Group on the
2004 Retail Trade Manpower Survey
Membership List**

Chairman

Mr. Philip Kung The Sincere Company Ltd.

Members

Ms. Grace Chow The Dairy Farm Company Ltd.

Ms. Winnie Chow ParknShop

Dr. Geoffrey Tso City University of Hong Kong

Mr. Chris Wu Li & Fung (Retailing) Ltd.

Mr. Andrew Tsang The Vocational Training Council

Secretary

Ms. Gladys Yam The Vocational Training Council

電話 Telephone No:
2957 5705

傳真 Facsimile No:
2591 1584

本局檔號 Our Reference:
(4) in RT/4/2 (2004)

來函檔號 Your Reference:

16th July 2004

Dear Sir/Madam,

2004 Manpower Survey of the Retail Trade

On behalf of the Vocational Training Council, I am writing to solicit your kind cooperation in the 2004 Manpower Survey to be conducted by the Retail Trade Training Board. The Training Board is a statutory body appointed by the Government to be responsible for matters pertaining to manpower training in the retail trade.

The purpose of the survey is to assess the latest manpower situation and training needs so as to enable the Training Board to formulate appropriate training plans for the Hong Kong retail industry. The survey will be conducted from 1st September to 5th October 2004. Your support in supplying the information will be much appreciated.

---- I enclose the following documents in both English and Chinese for your completion and reference :

1. The questionnaire,
2. Explanatory notes, and
3. Descriptions of principal jobs

During the survey period, an officer from the Census and Statistics Department will contact your office. The officer will answer any queries you may have, and collect the completed questionnaire.

I wish to assure you that the information collected will be handled in strict confidence and will be published only in the form of statistical summaries without reference to individual companies. Should you have any queries regarding the survey, please contact the Manpower Statistics Section of the Census and Statistics Department at 2887 5150.

Thank you for your cooperation.

Yours faithfully,



(Caroline Mak)
Chairman

Retail Trade Training Board