Manpower Update Report

Media and Communications Industry

2019

ACKNOWLEDGEMENT

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Introduction

Background

The Media and Communications Training Board (MCTB) of the Vocational Training Council (VTC) was appointed by the Government of Hong Kong Special Administrative Region to be responsible for, among other duties, determining the manpower situation and training needs of the industry.   Following a rationalisation exercise in 2017, new approach for conducting manpower survey is adopted to enhance the effectiveness and better reflect the dynamic of the manpower situation.   The new approach is to conduct full manpower survey for each industry once every four years, supplemented by periodic information updates through focus group meeting and desk research.

The MCTB completed its latest full manpower survey in 2016.   Two manpower update reports would be prepared during the period between 2018 and 2019.   The MCTB conducted three focus group meetings of the media and communications industry on 22 February 2019, 15 April 2019 and 24 April 2019 to collect views about the latest manpower situation and training needs from industry practitioners.

Desk research had also been done to capture recruitment information including job vacancies of principal jobs, qualification requirements and salary offered in the industry for the period from 4th quarter of 2017 to the 3rd quarter of 2018.

This is the second manpower update report of the Media and Communications industries which mainly covers the findings obtained from the focus group meetings, supplemented by the information acquired from desk research for reference purpose.

Objectives

The objectives of the manpower update are as follows:

(i)   To examine the latest trends and development;
(ii)   To explore the job market and training needs;
(iii)   To recognise the recruitment challenges; and
(iv)   To identify the job requirements.

Methodology

Overview

To collect a holistic manpower information of the media and communications industry, a new approach is adopted by the MCTB through conducting full manpower survey, supplemented by periodic update through focus group meetings and desk research. For the purpose of this update report, only focus group discussions and desk research will be covered.

Focus Group Meeting

The focus group meetings are intended to collect industry's view on the latest trend of manpower development, training needs and recruitment difficulties, etc. The focus group members are representatives from the media and communications industry, including:

Journalism Sector

1. Newspaper
2. Magazine
3. News and Information department in radio / television (TV) stations
4. News agencies

Digital / new media Sector

5. Digital / new media

Advertising & PR Sector

6. Public relation (PR) service suppliers
7. Advertising companies, agencies and other advertising services
8. Corporate communications / PR / advertising / marketing department in companies / institutions

Media Production Sector

9. Production Companies

Three focus group meetings (1.5 hours each) were conducted on 22 February 2019, 15 April 2019 and 24 April 2019. 7 to 11 industry representatives participated in each meeting. Two of the meetings were attended by middle to management level practitioners and one meeting was attended by millennial employees. The first meeting was moderated by a research consultant while the other two meetings by the Secretariat staff who initiated the discussion with general questions and probed into more specific context to collect in-depth information on relevant topics.
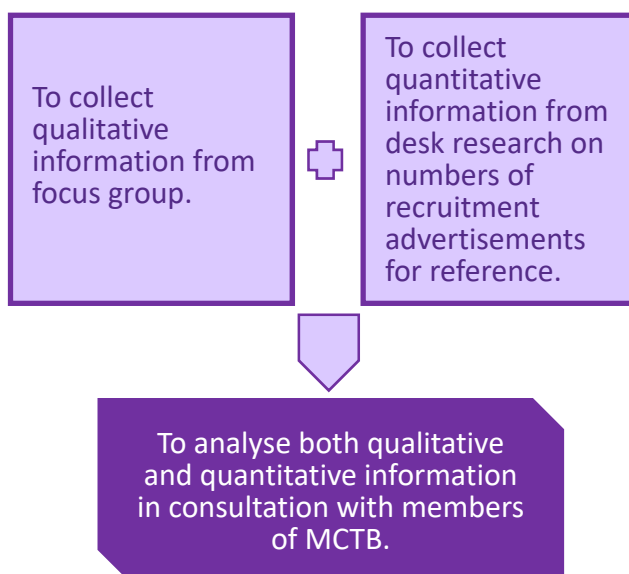
Desk Research

Manpower information covering the period between November 2017 and July 2018 was collected through desk research by quarter. The information includes the number of job advertisements, required competencies, qualification and experience, market remuneration, etc. An integrated database was developed to capture the relevant recruitment data from major online recruitment portals. Around 2,800 recruitment records were collected during the research period and served as indicative information of the job market trend. Information was mapped against the list of related companies under the Hong Kong Standard Industrial Classification and duplicated records were removed during the process.

Limitations

As this is not a full manpower survey, the findings and recommendations are more qualitative in nature. The report mainly focuses on the manpower trend. The desk research which focuses on online advertising from major recruitment websites and the Labour Department serves to reflect number of advertisement but not number of jobs. It does not cover occupations that might use other recruitment methods such as executive search companies, word-of-mouth or connection through social media. Since the data collected is a snapshot of a particular period without reference to any historical data, this can only serve as reference information supplementary to the findings of focus group meetings.

Data Analysis

The analysis consists mainly of the following three steps:

To collect qualitative information from focus group.

To collect quantitative information from desk research on numbers of recruitment advertisements for reference.

To analyse both qualitative and quantitative information in consultation with members of MCTB.

Findings

Factors Affecting the Development of the Media and Communications Industries

Discussions were invited in the focus groups to understand the factors affecting the development as well as the potential future changes of the industry.

5G Development

The industry foresees that 5G development and implementation would bring challenges and opportunities.

The high speed mobile network would facilitate data transmission, processing and analysis which allow the industry to offer more personalised messages through digital means to the target audiences at the right time.   While more augmented and virtual reality (AR and VR) applications would be unlocked by 5G, the new development of media interface would also be facilitated.   Media in the era of 5G would be able to provide audience with user journey by accurately predicting their needs such as traffic and weather conditions via AR, VR and live programmes.It is expected that the consumption of video, AR and VR contents would greatly expand.

Organisations that do not possess relevant talents would face the challenge of losing their competitiveness in the market if they are unable to produce high quality contents to meet consumers' expectation in the 5G era.

Technology

The development of technology has enabled virtual YouTubers with appealing facial expression and tactics to attract people as followers.   The trend is gaining momentum in Japan and Korea and might be the direction for Hong Kong media to develop in the future. User-friendly videography equipment and the growth of digital platforms also attracted more individuals to become freelancers and play their roles as key opinion leaders (KOLs).

China Market and the Greater Bay Area

The development of the Greater Bay Area would have great influence on Hong Kong's transformation.   The growth of Mainland enterprises and the expanding China market would continue to bring opportunities to the industry.

Acceptance on mobile technology innovation is high in China which nurtures a flourishing market of new media, online platform and e-payment system.   Keen competition with the media in the Mainland is foreseen. However, business exchange with Mainland companies would be more frequent and more interaction with Mainland audiences is expected.

Big Data

Most conventional print media was digitalised to become online media so as to embrace a wider prospective audience. Big data collected from the activities of online audience provides vast amount of consumer information.   Based on the insights from big data, journalists could identify their niches and appeal to the social communities or minorities by offering relevant contents to gain more influence.

In PR and advertising sector, big data enables businesses to gather insights from consumer behaviour and interactions. It helps to engage potential consumers and market the products more effectively. It is foreseen that the amount of data would be poured in as more devices can be connected under the 5G technology.

The accelerated pace of the industry, the digitisation of media and the need for creating more engaging content would impact on the skills and competencies required to cope with industry changes.

Future Manpower Demand

In the Desk Research conducted in 2016-17, 2,098 MC industry related job advertisements was recorded while most of them were from the sector of advertising and public relations. In 2017-18, a total of 2,866 job advertisements were recorded which accounts for an increase of 36%.   Similar to 2016-17, advertising and PR sector contributed to most of the manpower demand.   It is noted that there was a significant increase of job recruitment in the journalism, from 307 in 2016-17 to 735 in 2017-18.   The chart below shows the comparison of job advertisement in two periods of time.

Comparison of job advertisement by sector, 2016-17 vs 2017-18
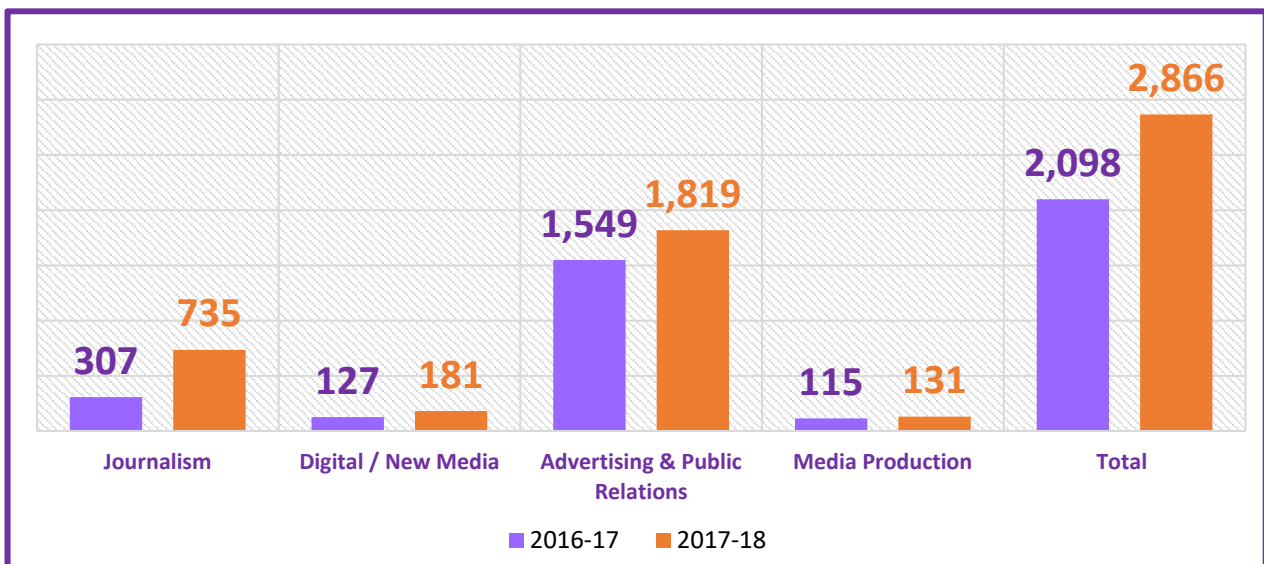
Comparison of job advertisement by job level, 2016-17 vs 2017-18
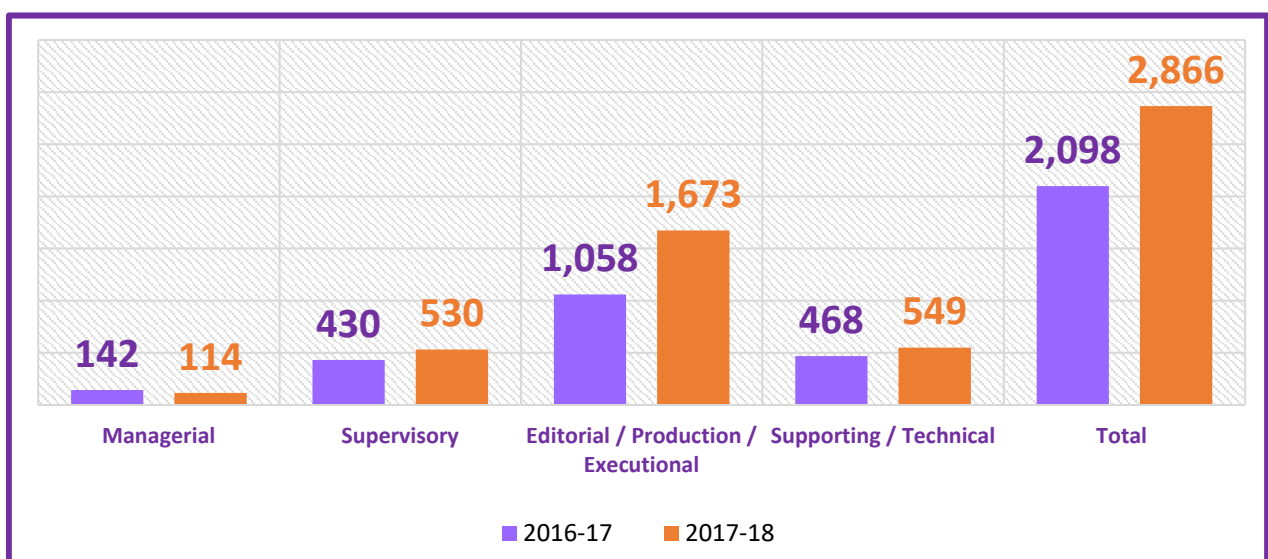
Top 5 recruiting positions in the MC industry, 2017-18

Journalism	Digital/New Media	Advertising & PR	Media Production
Reporter	Sales Assistant / Account Executive	Account Executive	Floor Manager / Video Editor / Engineer & Technician / Subtitling Operator
Advertising Sales Assistant / Account Executive	Marketing Executive	Account Manager	Producer / Production Assistant
Marketing Executive	Account Manager	Designer	Motion Graphic Designer / Visual Effects Designer / Animator
Editor	Marketing Manager	PR Officer	Content Writer / Script Writer
Advertising / Account Manager	Project Executive	Marketing Executive	Marketing Executive

The positive local and China economic environment and low unemployment rate (3.4% in 2016; 3.1% in 2017; 2.8% in 2018, the lowest in 20 years) are the key factors affecting the manpower situation in the industry.   Tight labour market and high turnover rate in the industry contributes to more recruitment activities in different sectors.

With reference to the discussed trends and development of the industries, views of the focus group on the new manpower requirements, emerging jobs and skills of the industry in the next 3 to 5 years were collected.

Emerging Jobs

KOL, YouTube creators and KOL agencies – With the rise of social media, active social media influencers with large fan bases provide new product recommendations through videos or live broadcasting, photos and articles on social media platforms.   They are Key Opinion Leaders (KOLs) among their followers in various fields, including food, travel, fashion, beauty, electronic products, kitchenware, electronic games, luxury goods, etc.   As it becomes increasing popular for brands to partner with social media influencers to promote products, there are similar influencers who produce video contents for YouTube platform known as YouTube creators.   They cover wide variety of product categories and produce videos viewed by thousands to millions of subscribers.   The KOL agencies emerged in the industry to help business find suitable KOLs, run a KOL campaign on suitable social media platforms, reach target customers, track and report on influencer marketing campaigns.

Emerging Skills and New Requirements

Analysing data retrieved from digital or social marketing campaign is becoming one of the skills sought after by industry practitioners.   Despite the fact that technology will continue to provide greater support in data analysis, it is always the practitioners' expertise to accurately interpret the meaning of data, present the effectiveness of campaign to clients in an understandable way and recommend further action or solution based on specialised market insight. The interpretation and presentation skills backed up by industry expertise are the essence which cannot be simply replaced by any technology

Multiple skill sets to perform different job roles become common as organisations evolve in the industry. For example, in some advertising firms, there used to be individual personnel responsible for account servicing, strategy planning and media buying.   However, in the digital era, to ensure fast response and cope with the shortened turnaround time of project-based campaigns, the above job roles are integrated to become one position.   Instead of creating a brand new job, the job scope of existing jobs might be widened and becomes more flexible.   Practitioners would require a combination of several skill sets to be competent for the job.   For instance,

creative designers nowadays possess skills sets of graphic design, motion graphic and videographer in the industry.

Social media marketing skill in Mainland context is highly sought after by the industry.   Mainland social media is dynamic, unique and greatly different from that of Hong Kong and rest of the world.   While international brands and businesses are eager to gain a share in the significant Chinese market, the massive number of social media users represents the great opportunity to reach potential customers.   The industry, especially the PR and advertising sector, expects employees to have a deep understanding on various Mainland social media platforms like WeChat, Douyin (TikTok), Weibo, Xiaohongshu, Meituan-Dianping, etc.   Mobile users rely on the platforms to access to other users' recommendations, product or service reviews and interact around various topics.   It requires specialists to track and analyse their discussions and generate insight for clients' social media strategy.

Training Needs

Skill Gaps

Based on the afore-mentioned trends and development of the industry as well as the expected manpower requirement, the focus groups identified the lack of some in-demand knowledge or skills among practitioners.

Junior Level Staff

Writing skill is considered the fundamental and necessary skill to be improved especially for entry level staff in the journalism, PR and advertising sector.

Employers generally agree that junior PR and advertising staff are proficient in presenting ideas verbally.   However, they are encouraged to further polish their skills in writing emails and reports for internal and external clients, as well as developing quality contents and messages.

AR, VR production skill will be sought after when the industry enters into the 5G era.   With increasing demand for the creation of AR and VR contents by brands and media to engage consumer and

audience through new experience, junior staff in the industry should develop relevant skills in using equipment and software to produce quality AR and VR contents

Middle Level Staff

Up-to-date market knowledge is the foundation for middle level practitioners to make accurate judgement and decisions.   Middle level staff should also keep abreast of the popular community forums and KOLs to ensure clients' resources are put in the right place.   They should also get familiar with various social media platforms in order to understand the specific nature of different platforms.

Video technique has become a general skill required by most practitioners in the PR and advertising sector.   Most staff, including supervisory level is expected to perform simple touch-up for videos to be released on social media or in presentation under tight timeline.

Knowledge of China is necessary for middle level practitioners to communicate with clients from Mainland or recommend effective solutions to businesses entering the China market.   The China market is huge and its demographics and culture vary by regions.   It is vital for practitioners to possess relevant knowledge including its

political, social and economic development as well as its industry practices.

Critical thinking and strong analytical skills are required for middle level staff to come up with findings and strategic insights from social listening.   Social listening refers to monitoring social media channels to understand how the public perceives the brand, product or a particular issue.   Middle level staff should develop the expertise to interpret the data, understand its implication to the organisation, discover opportunity and recommend suitable action to the management.   Practitioners should be able to provide relevant data insights that directs future campaign planning in line with the organisation's strategies.

Millennial Workforce

Millennials are the major workforce in the industry.   The focus groups identified their strengths as well as the skills and qualities to be developed, from the perspectives of millennials and their employers.

Characteristics and Strengths

Millennials (post-90s, age close to 30) constitute 10% to 50% of the workforce in those companies where focus groups participants work for.   Millennials are digital natives and are highly proficient in using digital tools.   They are energetic, full of curiosity and are always willing to try. They are fast learners and are able to learn proactively on skills or topics that interest them.   They are good team players and especially contributive in offering new ideas as they understand the latest trends and are familiar with KOLs.   All these attributes enable them to fuel the dynamic industry.

Qualities to be Developed

To grow further in the industry, the following qualities are in-demand for millennials:

Employers' view	Millennials' view
• Business sense – The most important quality for development from junior to middle level. Young practitioners should understand the organisation's business model and its position from a macro perspective e.g. Greater Bay Area, in order to obtain a picture of his/her career environment. Moreover, juniors who can expand their perspective and put themselves in clients' shoes will be more able to communicate with clients and see the value of his/her job.	• Adaptability – New technologies, new rules and regulations emerge in organisations and industry. It is necessary for practitioners to adjust smoothly and quickly to such changes with very little difficulties.

Employers' view	Millennials' view
• Writing skills – Millennials generally speak good English and Mandarin but need to enhance their written Chinese and English. Writing skill is the basis of the communications industry, for both social media and press channels.	• Express ideas – Be proactive in expressing ideas in meetings or discussions. It is the way to make oneself stand out from others.
• Stress-handling – Practitioners have to work in a fast-paced environment. The line between work-life and personal-life becomes thin due to the fact that practitioners have to cope with tight project timeline or have to respond quickly in the social media community. Young practitioners might be easily stressed out if they are not equipped with effective stress management skills.	• Be a fast, self-learner – Learn proactively and always keep up- to-date on the trends affecting the industry so to keep pace with the up and downs of the industry.
• Multi-tasking and positive work attitude – The basis for career growth.	• Sense of responsibility – Be accountable and trustworthy.

Training Needs of Millennials

The following knowledge and skills training is expected for the millennials:

	Employers' view	Millennials' view
Journalism, New Media/Digital Media	• Infographics • Video techniques	• Report and presentation practices in overseas media organisations
PR & Advertising	• Social listening data analysis • Video techniques (for middle level) • Privacy ordinance • Data ethics	• Big data analytics • Design software application • Infographic design • Video techniques
Media Production	• Real-time graphics	• EQ training, stress management

Workplace Diversity

The focus groups notice that there is a trend of increasing Mainland graduates joining the industry.   They completed degree education in local institutions and try to develop their career in Hong Kong.   Whether the Mainland graduates would form a stable supply of talent for the industry is yet to know.   However, it is considered that workplace diversity would facilitate generation of new ideas and a workforce of multi-generation brings more diverse perspectives.   It is agreed that mutual respect and professional communications are the key to maintain a harmonious workplace.

Recruitment Challenges

The industry has encountered difficulties in the recruitment process or staff retention.   This was probably due to the fact that the technologically-savvy millennials had their work values and expectations, making "work-life balance" a high priority.   They are in favour of flexible work environments and arrangements including working holidays and freelance jobs.

Practitioners with 5 to 8 years of industry experience tend to be more stable in the industry.   However, middle level experienced professionals with strong capability to drive results are still sought-after by the industry, especially in sectors of corporate communications, advertising, PR or marketing departments of different industries and public organisations.

RECOMMENDATIONS
Measures to Meet the Training Needs

To meet the development needs of the industry, it is considered essential for the education institutions and industry to formulate effective strategies in training and upskilling talents.

Employers to Facilitate Learning

Create a learning culture in the workplace facilitates the growth of employees and the organisation. New digital skills like software applications and social media tools can be obtained through self-learning, knowledge sharing or workshop conducted by colleagues.
Training workshops on trade-specific knowledge or skills such as data analytics, social listening, data ethics etc. can be conducted by industry associations or institutions and financially supported by employers.

Good coaching skills would help build employees' competence and confidence. To retain and develop younger generation, good mutual communications and coaching by senior staff are essential, so as to motivate the youngsters to have self-reflection for further improvements.

Strengthen Training for New Talent and Collaboration between Industry and Institutions

Long term collaboration should be developed between tertiary institutions and industry associations.

Industry organisations can work with institutions to formulate programmes that would provide internships for students to acquire new knowledge and techniques. Graduates who prefer to pursue further study might continue to work as part-time staff or freelancer to ease manpower shortage.

Programme content should be reviewed regularly together with industry experts so as to equip students with updated technological skills as well as a broad foundation covering business knowledge as well as trade specific knowledge like social listening analysis, privacy ordinance, data ethics, etc. As media and communication practitioners might have to face situations of pressing ethical issues that influence stakeholders and the society, emphasis should be placed on integrity, code of ethics and professional business practice to ensure ethical conduct and uphold professionalism of the industry.

On-the-job training course, mentorship programmes or seminars/workshops should be provided by institutions for existing staff to upgrade their knowledge and skills.

To arouse young people's interest in joining the industry, information such as structured progression pathways and career prospects could be made available to help them have a better understanding of the future opportunities of the industry. Office visit would also allow them to have a realistic expectation of what it is like to work in the industry.

Lifelong Learning

The fast-paced industry and increasing job-based projects require practitioners, including freelancers to develop competencies that are in-demand to maintain competitiveness.

With development of 5G and application of new technologies, upskilling and lifelong learning become increasingly important for industry practitioners and organisations at large.

To cope with the hectic schedule of practitioners, bite-size training of shorter duration should be offered to enrich their professional skills and knowledge that can be applied to work immediately.

The approach of microlearning should also be considered by training providers and industry practitioners. It allows learning contents to be delivered in small and specific pieces through mobile devices, while its formats can vary from

articles, interactive contents to videos. Practitioners would be able to learn at their own pace regardless of place and time or even in short periods available during commuting.   The flexibility of microlearning enables practitioners to learn with great autonomy.