



Manpower Update Report

Media and Communications Industry

2018

Media and Communications Training Board

ACKNOWLEDGEMENT

The Media and Communications Training Board (MCTB) would like to express thanks and gratitude to industry experts who participated as members of the focus group and contributed their time and offered valuable views on the manpower situation in the discussion meeting of the focus group for the media and communications industry. The opinions they made have formed an integral part of this update report.

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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(s) 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 30 January 2018, 1 February 2018 and 24 April 2018 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 the 4th quarter of 2016 to the 3rd quarter of 2017.

This is the first manpower update report of the media and communications (MC) industry 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 difficulties;
- (iv) To identify the job requirements; and
- (v) To review the market remuneration.

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 experts' view on the latest trend and development of the industry's manpower, training needs and recruitment challenges, etc. The focus group members are representatives from four sectors of 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) services 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 between January and April 2018. 7 to 9 industry representatives participated in each meeting. Two of the meetings were moderated by an experienced consultant and one meeting 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 in the discussion guide. The discussions at the meetings were transcribed to facilitate analysis.

Desk Research

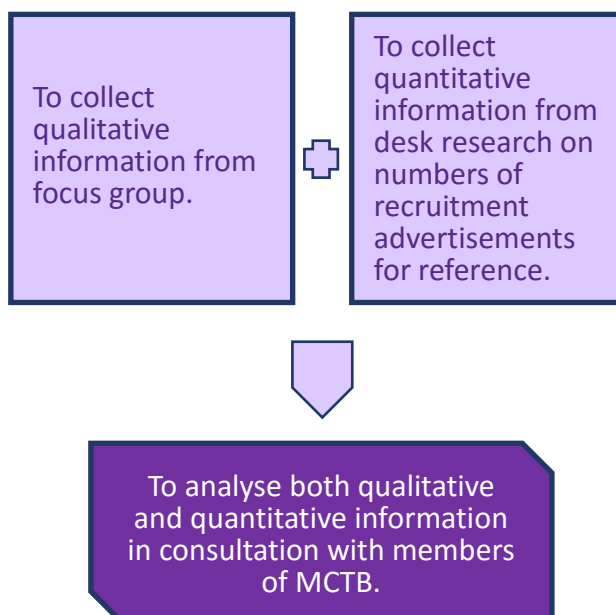
Manpower information covering the period between November 2016 and July 2017 was collected through desk research by quarter. The information includes the number of job advertisements, posts' required competency, qualification and experience, market remuneration, etc. An integrated database was developed to capture the relevant recruitment data from major online recruitment portals. Around 2,000 recruitment records were collected during the research period and served as indicative information of the job market trend. Mapping was made with the list of related companies under the Hong Kong Standard Industrial Classification for removal of duplicated records.

Limitations

As this is not a full manpower survey, the findings and recommendations of the focus group meetings are more qualitative in nature and the report mainly focuses on the manpower trend. The information of job advertisements was collected from major recruitment websites and the Labour Department, while other channels such as head hunting for managerial positions or referral and recruitment via LinkedIn were not covered. 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:



Findings

Factors Affecting the Development of the Media and Communications Industry

Several factors affecting the development of the industry were first identified by the MCTB. Questions in relation to the factors were raised and discussion were invited in the focus group to understand how the factors contributed to the recent development or changes in the industry.

Technology

Dissolved media boundaries and audience fragmentation

Technological advancement had greatly impacted the Media and Communications Industry. Transformation took place in the industry to match with the digital development. The flexibility of digital platform dissolved the boundaries of conventional media (newspaper, magazine, TV, radio, etc) leading to convergence of different communication channels. It increased job mobility of practitioners among sectors in the industry. Audiences' expectation and clients' request had changed. The time spent on media by the audience had become fragmented and scattered over various media on the digital platform. Advertisers preferred lower production budget, smaller campaigns with higher frequency instead of big campaigns.

Media Production Getting Easier

Benefited from the availability of low cost production gear with professional functions and user-friendly interface, media production companies could operate with much less investment. As people are now getting information from different tools, quick turnaround time was observed in all sectors.

Artificial Intelligence

Artificial Intelligence (AI) enabled more efficient use of manpower in organisations and might replace part of the manpower. AI was adopted in some media organisations for automated news writing and in PR & advertising services organisations for news monitoring or customer service. Media production companies also applied AI in video editing by converting the face of a person into someone else. Face recognition would also be used for electronic payment in the future.

Public Policy

Regulation on indirect advertising

The Communications Authority's proposal on relaxation of the regulation of indirect advertising and sponsorship in free TV services were welcomed by the media organisations. It is expected that more business opportunities would be brought by the relaxation of existing rules. The relaxation would also enhance the competitiveness of free TV services and bring positive influence to the overall development of the industry.

worked there to enrich their portfolio. Hong Kong production companies had shifted to a supportive role in China-based projects by participating in small parts of the whole process.

Mainland Development

New initiatives

Greater Bay Area development and the 'Belt and Road' initiative would bring more business opportunities to media organisations and the PR & advertising sector. However, different practices would be needed to cater for the local cultures.

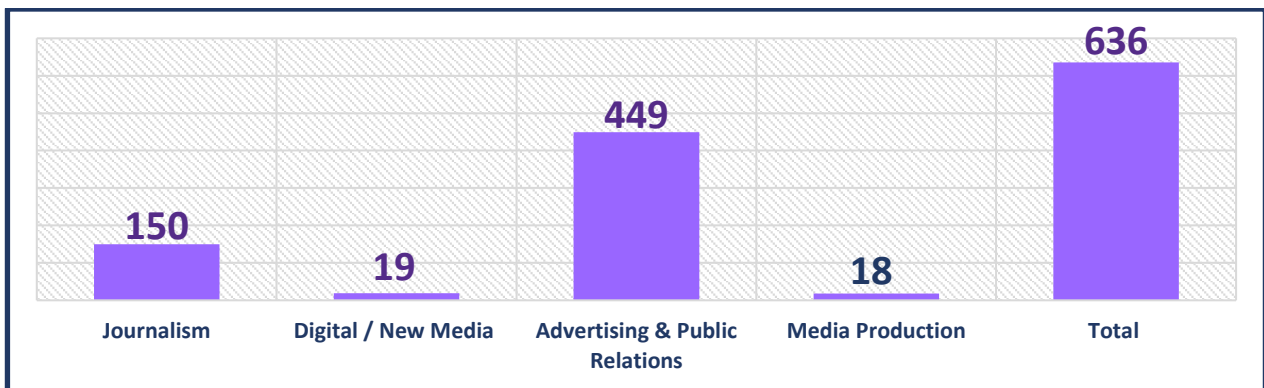
China-based projects

The media and entertainment industry in China maintained rapid growth and provided tremendous job opportunities. Many Hong Kong media production practitioners had moved to China and

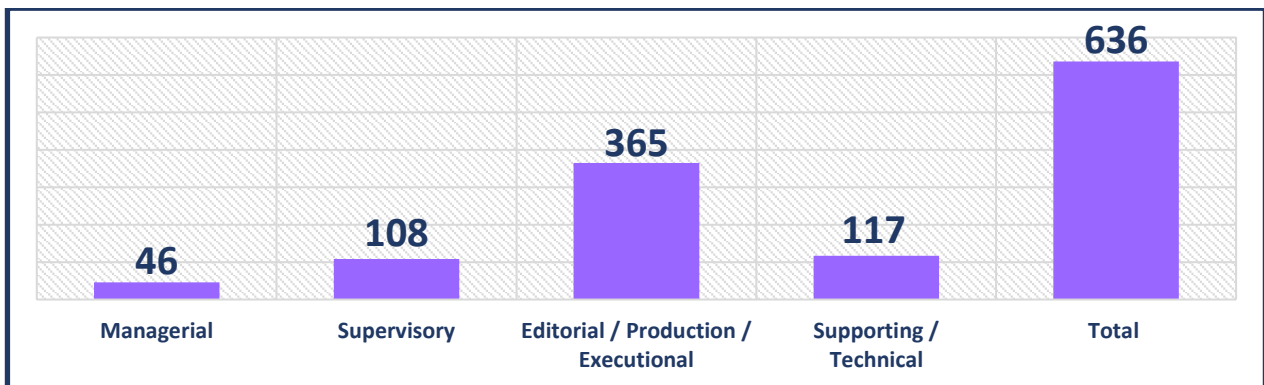
Future Manpower Demand

In the 2016 Manpower Survey of Media and Communications Industry, employers expected the manpower situation would remain constant in 2017, while a tiny proportion of companies expected contraction in manpower. The chart below shows the vacancy situation of the industry in 2016.

Number of job vacancy in the 2016 manpower survey of the MC industry (by sector)

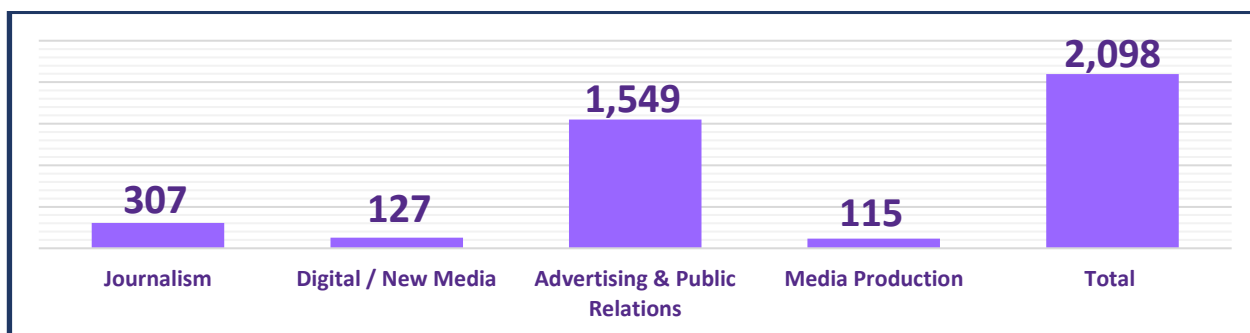


Number of job vacancy in the 2016 manpower survey of the MC industry (by job level)



The positive local and China economic environment and low unemployment rate (3.4% in 2016; 3.1% in 2017; 2.8% during Feb to Apr in 2018, the lowest in 20 years) are the key factors affecting the manpower situation in the industry. The turnover rate of the industry maintains high, resulting in the continuous demand of manpower in different sectors. This can be reflected in the number of MC industry related job advertisements captured by the desk research during November 2016 and July 2017.

**Number of job advertisements of the MC
for the period between November 2016 and July 2017 (by sector)**



**Number of job advertisements of the MC industry
for the period between November 2016 and July 2017 (by level)**



With reference to the discussed trends and development of the industry, views of the focus group on the anticipated changes in manpower demand of various sectors were collected.

Journalism Sector

The overall manpower demand in the sector would remain stable in the coming years.

Manpower for online and video-driven business

As most of the media organisations had branched out the digital arm, manpower demand would be affected in the following three aspects:

- (i) Further deployment of existing manpower from conventional business to online business is anticipated in newspaper and magazine organisations.
- (ii) Video plays a key role in the digital platform. The sector would demand more competent video production or video editing manpower.
- (iii) More IT professionals for apps development and maintenance would be required by Media organisations.

Videography equipment had been made more handy and easy to use. As a result, fewer engineering technicians were needed to support live broadcasting by TV stations.

High turnover positions

Due to the high turnover and expansion of business in some media organisations, the sector would continue to recruit reporters, editors, visual directors and producers for replenishment. It was common for some experienced reporters or editors to leave the sector for joining the PR sector, the Government, or setting up their own business. On the supply side, a portion of journalism fresh graduates would not enter the sector due to better job opportunities offered elsewhere.

Slight increase in manpower was expected in the sector as contributed by the demand for talents with video production and video editing skills.

Advertising & PR Sector

Subject to the economic development, manpower demand in the advertising & PR sector would increase, or at least maintain.

Traditional roles affected by technology

Technologies such as AI and chatbot would save manpower for news monitoring and handling enquiries. Besides, the change in media consumption pattern and automation would also reduce manpower responsible for handling statistics of print advertisements as consumers' viewing habit have shifted to online media and relevant statistics is gathered automatically.

Workforce for the adjusted operation mode

On the other hand, it is observed that clients had been changing their tactics to running campaigns more flexible in scale and higher in frequency to keep visibility and prominence in the market.

Companies were needed to adjust the operation mode to match with clients' expectation. Additional manpower would then be anticipated for providing timely service. In addition, the demand for User Experience (UX) specialist was also expected to increase in response to clients' request for the smooth integration of online and offline user experience to facilitate customers' purchasing action.

Demand for young blood

Young talents were strongly demanded in the sector, due to the high turnover of junior staff and their ability to adapt to the rapid changes in the sector.

Digital / New Media Sector & Media Production Sector

freelancers as well as different parties.

The manpower demand of both sectors might decrease as supported by technology in the coming years.

Streamlined manpower under digitalisation

The application of AI technology and automation would facilitate streamlining of manpower in the digital / new media sector to increase productivity.

There would be fewer full-time positions in the sector and some positions had even phased out (for example the assistant camera person who was primarily responsible for loading the new rolls of film) as most of the shootings were saved on digital storages rather than films nowadays.

Demand for project coordinators

Freelancers, in cooperation with other companies, or on-job basis would be more common in the media production sector to cope with jobs that were small parts of the whole process. Nevertheless, overseeing the whole workflow would become more crucial in successfully managing production projects participated by various collaborators. Talents with professional knowledge, good project management skills and familiar with industry's technical standards would be most sought after in the job market, especially for positions such as post-production coordinators. They should also possess good communication skills to manage file exchange and coordinate

Training Needs

Prominent competencies required by the industry

The job advertisements collected from major recruitment websites were analysed with focus on the competencies stated in the job requirements. The prominent competencies required by the industry are summarised in the following table.

Prominent competencies required by the MC industry according to the job advertisements (November 2016 – July 2017)

	Journalism	Digital / new media	Advertising & PR	Media production
Webpage Development	*	*	*	
Social Media Advertising	*	*	*	
User Interface Design	*	*	*	*
Graphic Design	*	*	*	*
Media Marketing / Sales	*	*	*	*
Internet Marketing	*			*
Marketing sales			*	
Video pre-production				*
Video shooting				*
Video editing		*		*
3D Graphic design				*
Digital entertainment				*
Photography				*
Mobile application				*

Based on the fore-mentioned trends and development of the industry as well as the expected manpower changes, the focus group identified further details on the skill sets as required by the industry.

Multi-skilled manpower

The industry demanded manpower to have a combination of skill sets of multiple disciplines. To cater for the video news reporting on the digital platform, the journalism sector expected reporters to possess skills in news writing, instant news reporting, photography, videography and hosting.

To cope with the tight turnaround time and clients' request for frequent campaigns, the advertising and PR sector requested practitioners to be proficient in videography, video editing and graphic design, apart from the practical marketing, advertising and PR skills.

It is also noted that apart from the common graphics design software and multimedia editing tools, most companies required graphic or multimedia designers to possess knowledge in webpage development.

Data Visualisation and Videography Skills

Owing to the growing popularity of video viewing via digital devices, more manpower with expertise in video shooting and editing will be required by the journalism and advertising & PR sector. Effectively presenting facts or news story

through infographics, motion graphics or interactive graphics is one of the sought after skills in both sectors. Most young journalists graduated in recent years, are digital natives and have already received relevant training in school. But the training demand for data visualisation and videography still exists for experienced journalists.

Social Media Skills

With the phenomenal growth of social media platforms like Facebook, Instagram, Twitter, Snapchat etc, it has enabled people from all over the world to share their story and essentially changed the way of communication to become more instant, creative and visual. Both the journalism sector and advertising & PR sector required practitioners to understand the characteristics of different social media platforms and the audience behaviour, to create content that can interact with audience, to complement creative visuals with engaging written content and to optimise content with technology.

Self-learning Ability

Due to the rapid technological development, what had been once the latest and greatest applications might become irrelevant today. All three sectors expected practitioners to have the capability to continuous learning and stay current with technology. For example,

journalists are requested to learn about how the technological updates can be applied to deliver news faster and in better quality.

Advertising & PR sector would require practitioners to learn about the latest tools of Google or Facebook to assist in customer profiling and targeting. Through self-learning, employees are encouraged to proactively offer proposal on how the organisational goal can be achieved through the effective use of technology.

Soft Skills

The advertising & PR sector and the media production sector expected new recruits are able to integrate, either media campaigns from online to offline or media production project collaborated by different parties. The advertising & PR practitioner should possess soft skills including cognitive ability, problem solving, judgement and campaign planning. Good communication, coordination and project management skills would be required by media production practitioners.

Recruitment Challenges

Most sectors have encountered challenges in hiring right talents with expertise in video production, data analysing, programming and apps development.

Remuneration and working hours

In the advertising & PR sector, there are fewer youngsters joining the sector compared to the past due to the demanding job nature and less competitive remuneration package. The same difficult situation exists in the journalism sector. Some positions in media organisations require on-shift or overnight work. Overnight work and working on public holidays are the factors that deter fresh graduates from joining the sector. Some of them will quit after working in the sector for only a short period of time due to the undesirable working hours.

Preference of young generation

Young generation has different preferences, expectations, and values in the workplace. They emphasis work-life balance, some prefer freelance or slash career. Even fresh graduates prefer to work as freelancers to enjoy greater flexibility in their work time arrangement.

The growing trend for practitioners to switch to freelancers also makes the journalism, advertising & PR sector difficult to recruit in-house staff.

Extra workload caused by manpower shortage

In the journalism sector, the existing staff have to share the extra workload caused by the high turnover rate and shortage of new replacement. This has in turn posed additional pressure on employees' work.

Competition for talents

Another factor that causes challenges in hiring is the keen competition among sectors in the industry. Employee mobility of the industry is high, especially among junior staff. Experienced professionals in the industry are most sought-after personnel by corporate communications, advertising, PR or marketing departments of sizeable companies of different industries and public organisations. Recruiting and retaining talent thus become difficult. It is not uncommon for journalists to look for opportunities in the communications or PR departments of other industries in view of the attractive remuneration offered.

RECOMMENDATIONS

Measures to Meet the Training Needs

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

Government

As the millennials are more eager to explore different work patterns and pursue self-actualisation through career, they may need more time and support before engaging to a profession. Career and life planning education and support for students and young working adults should be strengthened. Information on further training, advice and guidance on career development can be offered to help young practitioners to make decisions on learning, training and work.

Education Institutions

Training for young people

To cater for the increasing demand on visual experience via mobile devices, training on graphics, photography and video production should be emphasised in media and

communications programmes to prepare young people for joining the industry.

Knowledge support for practitioners

For in-service practitioners who have been serving in the industry for a period of time, part-time short courses on graphics design, infographics, motion graphics, interactive graphics, videography and video editing are required to keep them relevant to the industry development.

Owing to the hectic schedule and long working hours of media practitioners, workshop or sharing sessions on the latest trend on new technology application such as digital platform, video production or social media can be regularly arranged at practitioners' workplace or in the form of webinars.

Exchange between academics and the industry

Knowledge and experience exchange between industry practitioners and students can be strengthened. Practitioners from the industry can be invited to be guest lecturers or speakers in school lectures in order to train up students with industry's knowledge and practical skills on top of academic learning.

Advertising and PR graduates from different institutions possess different skills and knowledge. Some institutions place greater focus on the academic foundation while some focus more on students' ability to contribute instantly at work. It will be worth for institutions to take industry's advice into consideration during curriculum development.

Institution-employer partnership

It is agreed by the industry that curriculum comprised of practical elements such as internship and workplace attachment programme is effective in training up suitable talents and can ease the situation of manpower shortage. Education institutions may consider developing structured work-integrated learning programmes that involve partnership between institution and employer, in which both work together to help young people attain the educational goal through academic study and structured vocational training in the workplace. The work-integrated learning will better prepare young people for the school-to-work transition and improve the work-readiness of new entrants.

Employers

Engage young talents

The MC industry demands young manpower to fuel the development that matches with new technology.

To attract and retain the technologically-savvy millennials, employers should be aware of their work values and expectations and personalize each employment situation. More flexible appointment contracts can be offered to meet the career aspirations of prospective candidates. Freelancers will also ease part of the manpower shortage. Offering no-pay leave during working holidays is one of the ways to retain young talents. If resources are adequate, employers may recruit one or two extra frontline staff to ease workload and allow greater flexibility in staff deployment.

Organisations have to stay current with the remuneration packages to meet industry standard. Salary and benefits are fundamental to attract and retain talents. Building the company culture like a healthy work/life balance, autonomy to deliver, and defined ownership can also help engaging staff.

Incorporate interns into the workforce

In the age of talent shortage, employers take part in the internship programmes will gain more benefits. Internship enables employers a scope to try out different candidates before determining to get the right one. Intern students can also offer extra manpower support to the regular team. They are able to learn more about the industry through real work experience and join the team after graduation.

Take part in the industry's manpower development

In the long term, employers are also asked to support manpower development of the industry by

- (i) conducting more collaboration projects with training institutions to nurture young blood;
- (ii) providing advice to institutions on curriculum development for training more work-ready graduates; and
- (iii) participating in the VTC's manpower survey and focus groups where valuable insights are collected from the industry.

Employers are also encouraged to make good use of Government's funding and apply new technology for achieving better manpower cost-efficiency.

Support staff learning

Employers generally acknowledge that investment in talent development is part of their outlay to human capital. However, due to many competing interests and tight budgets, many employers may encounter difficulties in investing in employee professional development. While the long term personal development still rests on individual's responsibility, company commitment for the continuous professional development of

employees is essential for organisation growth. Employers are encouraged to support continuous learning amongst their staff particularly in face of the rapid development in technology.

Employees

An open mind to learn

Employees should have the capability to self-learn through various channels on the Internet and maintain an open mind to collaborate with and learn from people all over the world. They should be able to catch up with new technologies, and be aware of how AI affects the industry and the job opportunities.

Freelancers' career and development plan

Freelancing and slash career may be a new mode of working and open up vast opportunities for individuals. However, young freelancers should still develop a career and development plan to facilitate continuous upgrading of skills and new competencies in order to maintain their competitiveness in the industry.

Make use of Government's subsidy

Employees are encouraged to make use of the subsidies provided by the Government such as the Continuing Education Fund for lifelong learning.