

Manpower Update Report

Automobile Industry

2021



ACKNOWLEDGEMENT

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Introduction

Background

The Automobile Training Board (AUTB) of the Vocational Training Council (VTC) is responsible for determining manpower demand of the industry, assessing whether the manpower supply matches manpower demand, and recommending to the VTC the development of vocational and professional education and training (VPET) facilities to meet the assessed training needs.

A new approach for collecting manpower information is adopted to enhance the effectiveness and better reflect the dynamics of the manpower situation in the various industries.

Under the new approach, one full manpower survey is conducted every four years, and this is supplemented by two manpower updates. The AUTB completed its latest

manpower survey in 2019. Two manpower updates will be conducted in 2021 and 2022.

The 2021 manpower information update comprises:

(a) a focus group meeting getting the views of industry experts on the latest developments in the industry, manpower and training needs, and recruitment difficulties, and measures to tackle the challenges the industry faces; and

(b) desk research analysing job advertisements including qualifications, experience and skills required, and salaries offered by the principal jobs in the automobile industry.

Objectives

The objectives of the manpower update are:

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

Methodology

Overview

With reference to the 2019 full manpower survey of the automobile industry, this update report aims to provide qualitative descriptions of the recent development of the industry through a focus group meeting, supplemented by referring to some quantitative data of recruitment advertisements from desk research.

Focus Group Meeting

The focus group members are representatives from different industry sectors, including passenger and commercial vehicles dealers, bus company, garages, auto-parts suppliers, government departments and an education institute. All members are experienced and knowledgeable practitioners of the automobile industry.

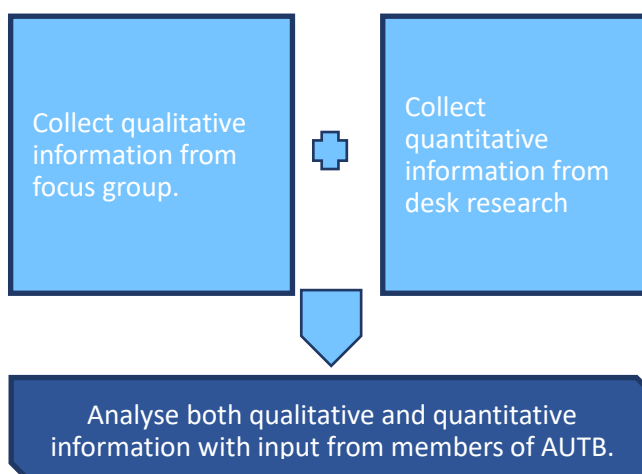
The focus group meeting was conducted on 20 July 2021. An experienced moderator led members to in-depth discussion on topics selected by the Working Party on Manpower Survey of the AUTB. The discussions at the meeting were recorded and transcribed to facilitate analysis.

Desk Research

Manpower information covering the period between Quarter 2 of 2020 and Quarter 1 of 2021 was collected through desk research. An employment information system was developed to capture the relevant recruitment data from major online recruitment portals. Some 809 recruitment records relevant to the automobile industry were collected during the research period and served as indicative information of the job market trend. The list of related companies under the Hong Kong Standard Industrial Classification was mapped to remove duplicated records.

Data Analysis

The analysis consists of the following three steps:



Limitations

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

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

Findings

Factors Affecting the Development of the Industry

Global Business Environment

The introduction of mass vaccinations and essential fiscal and monetary support in many major economies helped the global economy recover. Nevertheless, the more infectious delta coronavirus variant has been raging worldwide, posing a threat to the global economy.

Local Business Environment

Domestically, consumption and business sentiments turned more positive due to the boost by the Consumption Voucher Scheme in 2021. The business confidence levels across the automobile industry in Hong Kong has also been built up starting from Q2 of 2021.

Technology

Over the next 10 years, the global Automotive Industry is expected to face one of the most significant changes in its history – replacing internal combustion engine (ICE) vehicles with electric vehicles (EVs). As a result, modern vehicles are built with advanced electronics and information technology (IT) to meet the low emission requirements and provide state-of-the-art driver assistant functions to customers.

The era of connected vehicles has arrived with the powerful onboard computers in modern vehicles and the reliable 5G communication infrastructure.

To cope with the technology developments, vehicle servicing workers should equip themselves with basic knowledge of

electrical engineering, electronics and preferably IT as well, and traditional mechanical skills which will remain to be most important as disassembly and assembly are inevitable procedures in vehicle servicing. At the same time, in-service practitioners should engage in lifelong learning to catch up with the technology advancement.

Public Policy

The Hong Kong Special Administration Region (HKSAR) Government has implemented a plan to ban the sale of Internal Combustion Engine (ICE) vehicle registrations by 2035. In addition, it will stop the new registration of ICE vehicles, including plug-in hybrids and hybrids, in 2035 or earlier.

The Environmental Protection Department has also extended the existing first registration tax concessions on EV, from

March 2021 to March 2024. It will provide a clear medium-term road map conducive to EV adoption in Hong Kong.

These targets will prompt stakeholders to prepare for a better transition to EVs.

Infrastructure

To support the adoption of EVs, corresponding charging facilities would become part of the infrastructure in Hong Kong. According to the Environmental Protection Department, there were about 3300 EV charging stations open for public use as at end of March 2020.

The Government's target is to have at least 5000 public chargers provided by 2025 and plans to increase that number in the coming years. In this connection, it will increase the practicality of EV ownership, thus increasing demand.

Manpower Demand

Focus Group

Generally, the findings from desk research with most job advertisements matched the jobs with most vacancies from the 2019 Manpower Survey in both sectors. Out of some 800 entries of recruitment

advertisement captured in desk research, during the desk research period (Q2 of 2020 to Q1 of 2021), the respective top five principal jobs with the highest number of recruitment advertisements for vehicle servicing and auto/parts retail sectors were identified.

Desk Research Findings with Reference to the Last Manpower Survey

Below are the top five lists for the two sectors with reference to the principal jobs with the most vacancies reported in the 2019 Manpower Survey.

Vehicle Servicing Sector

	Top Five Principal Jobs with most job advertisements (2021 Desk Research)	Top Five Principal Jobs with most vacancies (2019 Manpower Survey)
1	Vehicle Mechanic (Craftsman Level) (31.1%)	Vehicle Mechanic (Craftsman Level) (61.5%)
2	General Worker/Cleaner (Unskilled Level) (17.2%)	Vehicle Painter (B2, B2(b)) (Craftsman Level) (6%)
3	Service Advisor (Technician Level) (12.9%)	Tyre Worker / Battery Worker (Specific Services) (5.4%)
4	Engineering Technician (Technician Level) (7.5%)	Vehicle Upholsterer (Specific Services) (5.3%)
5	Car Detailing Worker (Specific Services) (5.9%)	Service Supervisor (Technician Level) (4.3%)

Auto/Parts Retail Sector

	Top Five Principal Jobs with most job advertisements (2021 Desk Research)	Top Five Principal Jobs with most vacancies (2019 Manpower Survey)
1	Junior Sales Representative/Staff (Operation/Clerical Support) (31.4%)	Junior Sales Representative/Staff (Operation/Clerical Support) (29.5%)
2	Other Clerical/Supportive Staff (Operation/Clerical Support) (25.2%)	Other Clerical/Supportive Staff (Operation/Clerical Support) (23.2%)
3	Customer Services Supervisor (Supervisory Level) (12.6%)	Senior Sales Representative/Staff (Operation/Clerical Support) (16.1%)
4	Marketing Officer (Supervisory Level) (8%)	Stock Assistant (Operation/Clerical Support) (14.3%)
5	Stock Assistant (Operation/Clerical Support) (5.5%)	Sales/Service Staff (Part-time) (Operation/Clerical Support) (10.7%)

Principal Jobs of High Demand

Of the 809 relevant recruitment advertisements captured in desk research, the following 10 principal jobs had the most significant shares:

1. Junior Sales Rep. / Staff (31.4%)
2. Vehicle Mechanic (31.1%)
3. Other Clerical / Supportive Staff (25.2%)
4. General Worker / Cleaner (17.2%)
5. Services Adviser (12.9%)
6. Customer Services Supervisor (12.6%)
7. Marketing Officer (8%)
8. Engineering Technician (7.5%)
9. Car Detailing Worker (5.9%)
10. Stock Assistant (5.5%)

Compared with each principal job's manpower figures in the 2019 manpower survey, the number of vacancies was exceptionally high for General Worker/Cleaner, Service Advisor and

Customer Services Supervisor. This might be attributed to the higher turnover rates of these jobs. In general, jobs with most vacancies identified in the 2019 Manpower Survey have continued to be in demand in recent years.

Trends

The number of ICE on the road would be gradually replaced by EVs. So, the vehicle servicing workers equipped with the new skill sets, e.g. troubleshooting and repairing the electrical system in EVs and hybrid vehicles, will be in demand.

However, the new blood supply could not fully compensate for the natural wastage (e.g. retirement). Hence, there are many vacancies available across the whole spectrum of trades, particularly Vehicle Mechanic, Vehicle Body Repairer and Painter.

Training Needs

The Vocational Training Council (VTC) offers full-time training programmes relevant to automobile maintenance, including the Higher Diploma in Automotive Engineering and Diploma of Vocational Education (Automotive Technology). These programmes have embedded professional knowledge and EV maintenance skills in their curricula. They also include the latest technological development, safety standards, design, and operational principles. This structured pedagogical practice enables students to learn the latest EV technologies and standards directly from their real work experience in an authentic workplace.

EV and Hybrid Vehicles

As there are hazardous high voltages in the electrical system of EV and hybrid vehicles, most garages provided maintenance/repairing services for mechanical systems, e.g. brakes and suspension, only.

Therefore, they needed to learn: (i) how to identify the high voltage connections in EV and hybrid vehicles; and (ii) how to disconnect the battery and shut down the high voltage. Relevant safety training courses were available from VTC.

Globally, EV as a whole is still at the early stage of development. While technologies of e-private cars are getting more mature, models available in the market are less than that of fuel-propelled private cars at this stage.

Compared with the total number of licensed vehicles in Hong Kong (802 968 as in December 2020), the number of EVs on the roads (about 18,500) is still relatively small. Unless the volume reaches a certain level, few garages will invest in hardware and software to provide complete maintenance/repairing services to EV and hybrid vehicles. Hence, the training need will continue to grow slowly for the coming few years.

Petrol and Diesel Vehicles

Although there is no high voltage electrical system in petrol and diesel vehicles, electronics and computer technologies are equally advanced nowadays. Therefore, a vehicle service worker must understand the underlying working principles of these cars and the use of computerised diagnostic tools to provide effective maintenance/repairing services.

Workers employed by dealers received the necessary training and support from manufacturers. In contrast, workers of garages had to pick up the knowledge by other means, e.g. internet, technical documents published overseas, sharing among peer workers. Although VTC and government departments such as the Environmental Protection Department (EPD) and the Electrical and Mechanical Services Department (EMSD) regularly organised seminars and training workshops and invited manufacturers to share their technical information with the participants, in-depth training might not be readily accessible to all workers.

Given the sophisticated and proprietary technologies, nowadays garages probably need to focus their services on a few brands only. Otherwise, their equipment and training investment may become unmanageable.

Recruitment Challenges

Due to keen competition in the job market, some employers experienced challenges recruiting and retaining their technical trainees and staff. The difficulties encountered and possible factors are summarized below:

Vocational and Professional Education and Training (VPET) in Hong Kong

Under the existing education system in Hong Kong, very few secondary students will opt for vocational professional education and training (VPET) at the early stage of their secondary education. Given most students will pursue higher education, it is challenging for employers to recruit young trainees in particular, for those “blue-collar” positions. Given the situation of staff ageing, there is a tremendous demand for young blood to join the automobile industry as well.

Keen Competition among Industries and Employers

Some focus members expressed that automobile employers, especially garages in recent years, still found it challenging to attract and retain new staff. In addition, because of the better working environment, remuneration packages and more structured training programmes, most VTC graduates prefer to work in government departments, dealers and bus companies, leaving very few students willing to work in garages and vehicle workshops.

Long Training Period

Some focus group members commented that vehicle servicing trade’s training periods for 3 to 4 years are too long. They have expressed that the periods of apprenticeship for their trades were determined decades ago. With a modern teaching and learning pedagogy being used today, apprenticeship training could be done faster and completed within a shorter period of apprenticeship.

Difficult to Catch up with Technology Advancement

Unlike their peers in dealers, workers of garages often needed to acquire technical knowledge through self-learning, which imposed heavy stress on them, especially the middle-aged group. As a result, some found it too demanding and changed their job.

RECOMMENDATIONS

To attract talents and to meet the future development of the industry, the following measures involving the joint efforts of the training institutions, Government, employers, and graduates/employees are recommended:

Training Institution

Currently, VTC offers a full range of training programmes for the automobile industry, including a Higher Diploma in Automotive Engineering, a Diploma or Certificate of Vocational Education in Automotive Technology and Vehicle Body Repair, and skill upgrading courses for in-service practitioners. Furthermore, with the support of manufacturers and government departments, VTC would keep on organising seminars and training workshops to satisfy workers' training needs on new technologies, in particular those related to low emission, EV and hybrid vehicles.

Government

Launch Mandatory Registration Schemes

The HKSAR Government introduced the Voluntary Registration Scheme for Vehicle Mechanics and the Voluntary Registration Scheme for Vehicle Maintenance Workshops in 2007 and 2015, respectively. It aims to facilitate the public to identify registered vehicle mechanics easily and uplift the professional image of the vehicle maintenance trade. As at July 2021, there were around 8 116 (i.e. 79%) mechanics,

and 2 052 (i.e. 74%) workshops have registered in the schemes.

The Training Board shares the view of some focus group members that the introduction of **mandatory registration schemes for vehicle mechanics and vehicle maintenance workshops** will uplift the professionalism for the trade and hence attract more young people to join the automobile industry.

Employers

Broaden the Recruitment Targets

Employers of the automobile industry should broaden their recruitment targets to include ethnic minorities, females, middle-aged groups, and people looking for security and satisfaction in their jobs.

Measures to promote the Industry

Nowadays, nearly all industry sectors are competing for manpower. In addition to competitive remuneration packages, some focus group members suggested automobile employers to promote their trades proactively to students, parents and teachers, in order to attract new bloods and uplifting the image of the industry:

- promote the trade to secondary school

students through the Business-School Partnership Programme (BSPP) of Education Bureau;

- participate in the VTC Earn & Learn Scheme to recruit and retain more apprentices;
- support Workplace Learning and Assessment (WLA) by participating in the Pilot Incentive Scheme to Employers (PISE);
- support their employees to undertake/participate in upgrading courses, training programmes, workshops, and seminars to acquire advanced technologies to cope with the developing needs of the automobile industry.

Review the Apprenticeship Training Scheme

While some employers believed that four years were necessary to train a competent vehicle mechanic, some suggested that the duration should be reviewed, given the changes in technology and work practice over the years. In addition, for trainees of this generation, a shorter training period may help elevate their interests and aspirations.

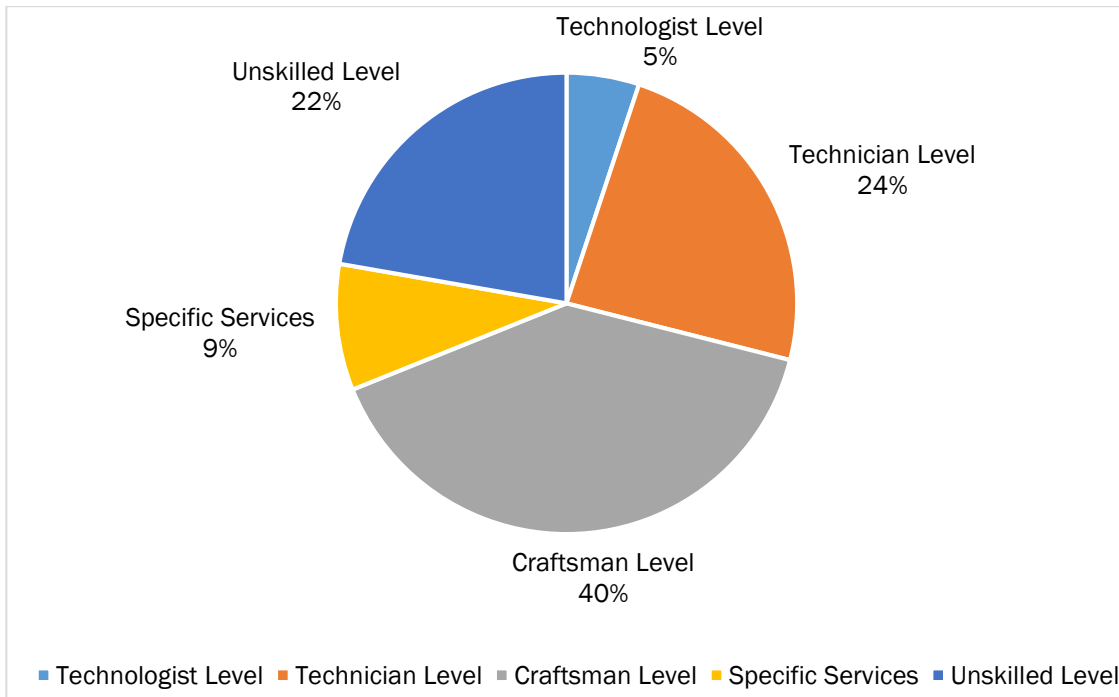
Further consultation about the training duration is required before a majority consent can be reached. Meanwhile, employers may consider adopting better job titles for their trainees.

Graduates and Employees

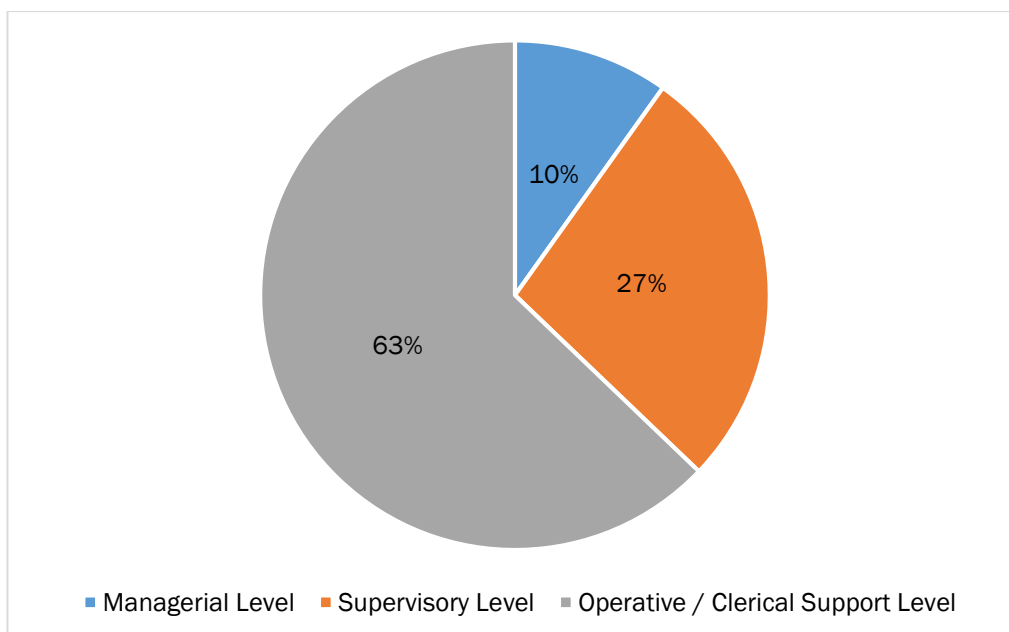
Lifelong Learning

To keep pace with the technology development, it is vital for practitioners of the automobile industry to embark on a life-long learning journey throughout their career by attending upgrading courses, workshops and seminars organised by the VTC, government departments and professional bodies. It is also of equal important that employers recognise such needs and support their employees to acquire knowledge and skills on advanced technologies.

Distribution of Advertisements from Popular Recruitment Media (Q2 2020 to Q1 2021) by Job Levels of the Vehicle Servicing Sector



Distribution of Advertisements from Popular Recruitment Media (Q2 2020 to Q1 2021) by Job Levels of the Auto/Parts Retail Sector



Distribution of Advertisements from Popular Recruitment Media
(Q2 2020 to Q1 2021) by Principal Job by Sector

	Principal Job	%
Vehicle Servicing Sector		
1	Vehicle Mechanic	31.1
2	General Worker / Cleaner	17.2
3	Services Adviser	12.9
4	Engineering Technician	7.5
5	Car Detailing Worker	5.9
6	Vehicle Body Repairer	5.1
7	Customer Services Ambassador / Assistant	5.1
8	Mechanical Engineer (Automotive)	2.9
9	Service Manager	2.1
10	Vehicle Painter	2.1
11	Motor Vehicle Examiner	1.9
12	Service Supervisor	1.6
13	Vehicle Electrician	1.6
14	Motorcycle Mechanic	1.6
15	Tyre Worker / Battery Worker	1.1
16	Car Accessories Worker	0.3
Auto/Parts Retail Sector		
1	Junior Sales Representative / Staff	31.4
2	Other Clerical / Supportive Staff	25.2
3	Customer Services Supervisor	12.6
4	Marketing Officer	8.0
5	Stock Assistant	5.5
6	Marketing Manager	3.9
7	Parts / Logistics / Distribution / Warehouse Supervisor	3.7
8	Sales Manager	2.5
9	Merchandiser	2.1
10	General Manager	1.6
11	Store Supervisor	0.9
12	Customer Services Manager	0.9
13	Senior Sales Representative / Staff	0.7
14	Parts Manager	0.5
15	Merchandising Manager	0.5

Number of Advertisements from Popular Recruitment Media
(Q2 2020 to Q1 2021) by Qualification Requirements

Job Level	Principal Job	University Degree	Sub-Degree / Higher Diploma / Higher Certificate	Diploma / Certificate / Apprenticeship	Upper Secondary (F.4 or above)	Lower Secondary (F.1 to F.3)	Primary	No Requirement	Unspecified	Grand Total
Managerial Level	Customer Services Manager	2	-	2	-	-	-	-	-	4
	General Manager	5	1	-	-	-	-	-	1	7
	Marketing Manager	13	1	1	-	-	-	-	2	17
	Merchandising Manager	2	-	-	-	-	-	-	-	2
	Owner / Sole Proprietor / Working Partner	-	-	-	-	-	-	-	-	-
	Parts Manager	1	-	-	-	-	-	-	1	2
	Sales Manager	6	1	1	3	-	-	-	-	11
Sub-total		29	3	4	3	-	-	-	4	43
Technologist Level	Mechanical Engineer (Automotive)	4	2	-	1	-	-	-	4	11
	Service Manager	6	1	-	-	-	-	-	1	8
Sub-total		10	3	-	1	-	-	-	5	19
Supervisory Level	Engineering Technician	3	14	4	1	-	1	-	5	28
	Motor Vehicle Examiner	-	-	-	-	4	-	-	3	7
	Service Instructor	-	-	-	-	-	-	-	-	-
	Service Supervisor	-	2	1	2	-	-	-	1	6
	Services Adviser	1	2	20	13	1	-	-	11	48
Sub-total		4	18	25	16	5	1	-	20	89
Technician Level	Customer Services Supervisor	14	1	7	16	-	-	5	12	55
	Marketing Officer	31	1	2	1	-	-	-	-	35
	Merchandiser	2	2	3	1	-	-	-	1	9
	Parts / Logistics / Distribution / Warehouse Supervisor	-	-	2	7	-	-	-	7	16
	Store Supervisor	1	-	-	1	-	-	-	2	4
Sub-total		48	4	14	26	-	-	5	22	119
Craftsman Level	Vehicle Body Repairer	-	-	-	-	4	6	2	7	19
	Vehicle Electrician	-	-	-	-	3	1	2	-	6
	Vehicle Mechanic	-	4	18	12	42	16	16	8	116
	Vehicle Painter	-	-	2	1	4	-	1	-	8
Sub-total		-	4	20	13	53	23	21	15	149
Operative/Clerical Support Level	Junior Sales Representative / Staff	20	23	51	20	-	-	-	25	139
	Other Clerical / Supportive Staff	28	21	21	31	2	-	-	5	108
	Part Time Sales / Service Staff	-	-	-	-	-	-	-	-	-
	Senior Sales Representative / Staff	-	-	1	-	-	-	-	2	3
	Stock Assistant	-	2	4	3	3	-	3	9	24
Sub-total		48	46	77	54	5	-	3	41	274

Job Level	Principal Job	University Degree	Sub-Degree / Higher Diploma / Higher Certificate	Diploma / Certificate / Apprenticeship	Upper Secondary (F.4 or above)	Lower Secondary (F.1 to F.3)	Primary	No Requirement	Unspecified	Grand Total
Specific Services	Car Accessories Worker	-	-	-	-	-	-	1	-	1
	Car Detailing Worker	-	-	-	4	3	4	9	2	22
	Industrial Vehicle Mechanic	-	-	-	-	-	-	-	-	-
	Lubrication Worker	-	-	-	-	-	-	-	-	-
	Motorcycle Mechanic	-	-	-	4	-	-	2	-	6
	Tyre Worker / Battery Worker	-	-	-	1	-	-	-	3	4
	Vehicle Air-Conditioning Mechanic	-	-	-	-	-	-	-	-	-
	Vehicle Body Builder	-	-	-	-	-	-	-	-	-
	Vehicle Upholsterer	-	-	-	-	-	-	-	-	-
Sub-total		-	-	-	9	3	4	12	5	33
Unskilled Level	Customer Services Ambassador / Assistant	-	2	5	10	-	-	-	2	19
	General Worker / Cleaner	-	-	-	8	19	10	13	14	64
Sub-total		-	2	5	18	19	10	13	16	83
Grand Total		139	80	145	140	85	38	54	128	809

**Number of Advertisements from Popular Recruitment Media
(Q2 2020 to Q1 2021) by Experience Requirements**

Job Level	Principal Job	0 Year / Less than 1 Year	1-2 Years	3-5 Years	6-9 Years	Over 9 Years	Unspecified	Grand Total
Managerial Level	Customer Services Manager	-	1	-	2	-	1	4
	General Manager	-	-	4	2	-	1	7
	Marketing Manager	-	-	10	4	-	3	17
	Merchandising Manager	-	-	-	2	-	-	2
	Owner / Sole Proprietor / Working Partner	-	-	-	-	-	-	-
	Parts Manager	-	-	-	-	1	1	2
	Sales Manager	-	-	8	3	-	-	11
Sub-total		-	1	22	13	1	6	43
Technologist Level	Mechanical Engineer (Automotive)	-	1	4	-	1	5	11
	Service Manager	1	-	6	-	-	1	8
Sub-total		1	1	10	-	1	6	19
Supervisory Level	Engineering Technician	1	13	10	2	-	2	28
	Motor Vehicle Examiner	-	2	4	-	-	1	7
	Service Instructor	-	-	-	-	-	-	-
	Service Supervisor	-	-	3	-	1	2	6
	Services Adviser	1	15	19	-	-	13	48
Sub-total		2	30	36	2	1	18	89
Technician Level	Customer Services Supervisor	2	25	6	4	-	18	55
	Marketing Officer	1	4	23	-	-	7	35
	Merchandiser	-	4	4	1	-	-	9
	Parts / Logistics / Distribution / Warehouse Supervisor	-	8	3	-	-	5	16
	Store Supervisor	-	1	1	-	-	2	4
Sub-total		3	42	37	5	-	32	119
Craftsman Level	Vehicle Body Repairer	3	1	9	-	-	6	19
	Vehicle Electrician	1	2	3	-	-	-	6
	Vehicle Mechanic	5	38	59	1	-	13	116
	Vehicle Painter	1	7	-	-	-	-	8
Sub-total		10	48	71	1	-	19	149
Operative/Clerical Support Level	Junior Sales Representative / Staff	7	85	17	-	-	30	139
	Other Clerical / Supportive Staff	2	51	37	4	-	14	108
	Part Time Sales / Service Staff	-	-	-	-	-	-	-
	Senior Sales Representative / Staff	-	-	3	-	-	-	3
	Stock Assistant	-	9	6	-	-	9	24
Sub-total		9	145	63	4	-	53	274

Job Level	Principal Job	0 Year / Less than 1 Year	1-2 Years	3-5 Years	6-9 Years	Over 9 Years	Unspecified	Grand Total
Specific Services	Car Accessories Worker	-	-	1	-	-	-	1
	Car Detailing Worker	6	11	1	-	-	4	22
	Industrial Vehicle Mechanic	-	-	-	-	-	-	-
	Lubrication Worker	-	-	-	-	-	-	-
	Motorcycle Mechanic	2	2	-	1	-	1	6
	Tyre Worker / Battery Worker	1	-	-	-	-	3	4
	Vehicle Air-Conditioning Mechanic	-	-	-	-	-	-	-
	Vehicle Body Builder	-	-	-	-	-	-	-
	Vehicle Upholsterer	-	-	-	-	-	-	-
	Sub-total	9	13	2	1	-	8	33
Unskilled Level	Customer Services Ambassador / Assistant	1	13	-	-	-	5	19
	General Worker / Cleaner	10	28	17	-	-	9	64
	Sub-total	11	41	17	-	-	14	83
	Grand Total	45	321	258	26	3	156	809