

Manpower Update Report Print Media and Publishing Industries

2023



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Introduction

Background

The Print Media and Publishing Training Board (PPTB) of the Vocational Training Council (VTC) is appointed by the Government of the HKSAR. According to its Terms of Reference, the PPTB 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 PPTB completed its latest manpower survey in 2020. Two manpower updates will be conducted in 2023 and 2024.

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The 2023 manpower information update comprises:

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

(b) desk research analysing jobadvisements in the Print Media andPublishing industries.

Objectives

The objectives of the manpower update are:

- (i) to examine the latest trends and developments of the industries;
- (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 2020 full manpower survey of the print media and publishing industries, this update report aims to provide qualitative descriptions of the recent development of the industries through focus group meetings, supplemented by making reference to some quantitative data of recruitment advertisements from desk research.

Focus Group Meeting

The focus group was formed through engagement of the industry experts to understand the latest trend and development of the manpower, training needs and recruitment difficulties in the print media and publishing industries. **Members** participating in the focus group are representatives from the following sectors:

Print Media Industry

- **Digital Printing** (i)
- (ii) Green Printing and Packaging

Publishing Industry

- (iii) Digital Publishing
- (iv) Children Books Publishing
- **General Books Publishing** (v)
- (vi) Textbook Publishing

The focus group meeting was conducted on 1 and 5 December 2022. The Secretariat staff of the PPTB and Manager-In-Charge of

Pro-Act Training and Development Centre (Printing) of VTC as the moderators led members through in-depth discussion on topics set out by the Working Party on Manpower Survey of PPTB. The discussion at the meeting was recorded and transcribed to facilitate the analysis.

Desk Research

Manpower information covering the period between November 2021 and October 2022 collected through desk research. was 2,592 recruitment records of print media and publishing industries were collected during the research period. Mapping was made with the list of related companies under the Hong Kong Standard Industrial Classification for removal of any duplicated records.

Data Analysis

steps: Collect Analyse both qualitative and quantitative information with input from Members of PPTB

The analysis consists of the following three

Limitations

As this is not a comprehensive 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.

In addition, the figures of job advertisements were collected from major recruitment websites and the Labour Department, while other channels, such as head hunting for managerial positions or referral via the social media recruitment platform 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 focus group meeting.

Findings

Factors Affecting the Development of the Print Media and Publishing Industries

Local Conditions in Hong Kong

A wide range of local economic activities in 2022 was hit hard by the fifth wave of COVID-19 epidemic and resultant anti-epidemic measures. According to the latest release¹ of Census and Statistics Department in February 2023, the Hong Kong economy in the fourth quarter of 2022 decreased by 4.2% on a year-on-year basis and shrank 3.5% for 2022 as a whole.

As the business environment of print media industry is tightly interwoven with other industries, the local economic downturn

¹ Source: <u>news.gov.hk - Economy shrinks 3.5% in 2022</u>

would reduce the frequency of advertising campaigns which in turn affected the order for posters, flyers, brochures and marketing materials. The performance of print media industry showed a widen contraction. Similarly, the performance of publishing industry was also hit hard as many book stores closed during the pandemic period. Due to the declining local birth rate and a wave of migration of local people, especially the group of middle-class families with strong spending power to buy books, in 2022, the publishing industry was adversely affected.

Looking ahead, in view of the re-opening of border crossings (i.e., the Mainland to Hong

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Kong borders as well as Hong Kong to international market), the relaxation of all pandemic measures as well as the launch of "Hello Hong Kong" promotional campaign to revive tourism industry in Hong Kong, it is that the local anticipated business environment would regain its momentum. The Government forecasts that the Hong Kong economy is expected to show a recovery in 2023¹. More business opportunities in the print media and publishing industries would then be brought.

Unstable Global Environments

Externally, the unstable global environment in 2022 has posed many uncertainties and further impacted the development of Such external factors² include industries. the Russian-Ukraine war which would drive up energy and commodities prices, tightened financial conditions resulting from the sharp interest rate hikes by major central banks, the economic slowdown of Mainland China, U.S. and European Union (EU) markets etc. The printing orders from local and overseas markets in 2022 has reduced almost 30-40%. During the period from January to October in 2022, the total exports of printed matters to the markets of Mainland China. U.S. and EU declined 56.3% 31.9% 31.3%. and respectively³.

Worldwide Geo-Political Tensions

The China-US trade disputes continue to impose uncertainties to the development of the print media and publishing industries. To diverge risks associated with the trade war, some clients looked for print media manufacturers in other Asian regions and / or local manufacturers would also consider relocating their manufacturing plants from Mainland China to other countries as well.

Additionally, the requirements on reviewing publications from Taiwan, Hong Kong and other parts of the world became more stringent. These have aggregated to extra challenges for the publishing industry.

² Source: <u>Third Quarter Economic Report 2022 (hkeconomy.gov.hk)</u>

³ Source: Hong Kong Census and Statistics Department

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Latest Development and Trends of Print Media and Publishing Industries

Print Media Industry Digital Technology to Support Packaging Sector

In the post-pandemic era, digital economy is considered as a crucial trend to achieve highquality development. It is anticipated that digital printing continues to grow in popularity in print media industry because such digital technology provides a convenient, affordable, and efficient way to print digital content directly to various media, especially in the packaging and label sector. As tech-savvy and social media friendly customers appeal to a unique shopping experience in recent years, craftily designed packaging could attract consumers' attention. With digital printing, there are more opportunities to create unique and limited-edition labels, personalised products for target consumers and experiment with new style / range, without the commitment of costly highvolume order⁴.

To expand more business opportunities in the future, print media industry could attempt to further explore related business (i.e. packaging and label market – gift and premium), increase accessibility for all sized businesses and provide more print options to brand owners.

Industry 4.0

In response to the increasing expectations of "fast" delivery and "high" quality raised by customers, print media industry should move forward to adopt Internet of Things (IoTs), smart manufacturing and big data to optimise productions. Industry 4.0 is an important component for enterprises to provide the technological infrastructure for standardisation. automation and smartification of production processes. By leveraging on smart technologies and processes, printing manufacturers could better manage not only production but also the entire supply chain, eventually. becoming more agile, flexible and responsive to their customers' needs.

Adoption of Information Technology System

For print media industry, printing companies continue to strengthen the application of information technology. For example, a user-friendly online order system would be adopted to automatically check files submitted, provide information on price and production time, update clients the status of the order and delivery information. An enhanced system could also simplify the

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⁴ Source: <u>How Digital Printing Changed The Packaging Industry (focuslabel.com)</u>

order placing process and improves clients' confidence.

Publishing Industry Rising Demand of Electronic Books

The demand for physical books has been decreased in the past years while the electronic books market in Hong Kong continues to grow dramatically. One of the major reasons is that consumers have changed the reading behaviour from physical books to electronic books during the pandemic. According to the 2022 survey of Hong Kong People's Reading Habits ⁵ conducted by Hong Kong Publishing Professionals Society, the results indicated that 70% of the respondents have habit of ereading, of which 70% of them would increase their reading time through digital devices whereas 35% of them would consume e-books.

Besides, in response to high demand for ebooks, Hong Kong Public Libraries (HKPL) has increased the number of e-books in the library collections from 340,000 items in 2019 before the pandemic to 490,000 items, representing an increase of over 44% ⁶. HKPL would continue to procure e-books on various subjects to address readers' needs.

Continuous Promotion of Reading Culture

Over the past years, the Education Bureau has actively promoted "Reading to Learn" to kindergartens, primary and secondary schools. "Promotion of Reading Grants" are introduced to kindergartens, public sector primary and secondary schools in order to strengthen the promotion of reading. Schools are encouraged to use the Grants to organise different types of school-based reading activities to create a favourable reading environment to nurture students' reading habits and enhance their reading and learning abilities. With the continuous supports by the Government, more and more schools would also develop their e-libraries in recent years, therefore, the demand for ebooks and audio books would be increased.

Grooming of Children Book Market

Despite the change of reading behaviour from physical books to digital device, the prospect of children book (including audio books) market remains positive as more and more parents would continue encourage their children to develop the reading habit and interest. The result from the survey conducted by the Hong Kong Trade Development Council at Hong Kong Book Fair 2022⁷ revealed that one of the most popular genres was children books.

⁵ Source: 「香港全民閱讀調查 2022」詳細調查報告及建議事項 (hkpps.org)

⁶ Source: <u>LCQ9: Promotion of reading for all (info.gov.hk)</u>

⁷ Source: <u>HKTDC Hong Kong Book Fair 2023</u>

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Growing Importance of E-Commerce System

During the pandemic, more consumers have developed the habit of online shopping. Under the new normal, publishing houses or publishers would increasingly rely on the use of e-commerce channels to engage more readers. According to the 2022 survey of Hong Kong People's Reading Habits⁴, the result reflected that the publishing industry had made good use of different social media channels in particular for production of video clips for further promotion. Such strategy helped achieve considerable sales of new books and old books.

With the migration wave in recent years, many Hong Kong readers in overseas buy books and/or other publications through ecommerce platforms. Additionally, in order to expand the Mainland market, publishers or publishing companies are encouraged to gain massive exposure through various Chinese social media platforms e.g., Tiktok, XiaoHungShu, Weibo, WeChat, etc. so as to further enhance their brands visibility rapidly in the Mainland market.

Sustainable Developments of Print Media and Publishing Industries

Digital Transformation

With technological development and advancement as well as information explosion, print media and publishing industries must renovate their business strategies. It is imperative for them to carry out digital transformation in order to grasp more business opportunities so as to enhance competitiveness its and sustainability.

In the 2023-24 Budget, the Government announced that the "Digital Transformation Support Pilot Programme" would be launched to assist small and medium enterprises (SMEs) in further expediting the pace of digital transformation. This initiative would subsidise SMEs in applying ready-to-use digital solutions to facilitate their business digitisation.

Inevitability of Green Printing

In recent years, consumers are increasing the environmental awareness of daily life including the expectations of eco-friendly printing and related products. Green printing, which helps reduce waste, eliminate harmful chemicals and protect the environment. and its sustainability is increasingly essential in print media industry worldwide.

i. Green International Standards:

To lead the print media industry towards a more sustainable future, printing companies should continue provide environmentally friendly printing services, i.e., using renewable energy resources and recycled materials as well as reducing the use of energy and green house emission, etc. To meet the requirements of green printing, printing companies are encouraged to obtain relevant international certifications such as Stewardship Council Forest (FSC). Sustainable Forest Initiative (SFI), Programme for the Endorsement of Forest Certification (PEFC), etc. as well as process / facility certifications (Sustainable Green Printer (SGP), EcoLogo ISO 14001, OHSAS 18001, etc.).

ii. Green Policies and Regulations from Local Government:

In order to construct a green city of Hong Kong. the Government has strongly committed to achieve carbon neutrality by 2050 and reduce its carbon emission by 50% before 2035 through engagement of decarbonisation initiatives, covering energy savings. green transportation, waste management, as well as air and water quality. Besides, the Government has also set out the Volatile Organic Compounds (VOCs) regulation and implemented a series of control measures (i.e., VOCs content limits for regulated printing inks). As the emissions of VOCs used in printing has negative consequences, printing companies are required to comply with the requirements of relevant government policies and regulations.

iii. Environment, Social, Governance Strategy

Environment, Social, Governance (ESG) strategy becomes a major international trend to evaluate the sustainability profile of printing companies in print media industry. In 2022, EU introduces new sustainability standards⁸ (i.e., reporting requirements on companies' impact on the environment, human rights and social standards) to all large multinational companies and listed small-medium enterprises (SMEs) to comply. These new rules will apply between 2024 and To meet the new requirements at 2028. global level, Hong Kong printing companies especially SMEs should consider develop their ESG frameworks.

Connectivity with Greater Bay Area

With the rapid development of digital publishing market in the Mainland, Hong Kong publishers or publishing enterprises could further enhance the collaborations with enterprises in the Greater Bay Area (GBA) so

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⁸ Sustainable economy: Parliament adopts new reporting rules for multinationals

Source: <u>https://www.europarl.europa.eu/news/en/press-room/20221107IPR49611/sustainable-economy-parliament-adopts-new-reporting-rules-for-multinationals</u>

that Hong Kong counterparts can learn and absorb their advanced digital publishing technology, knowledge and skills. Enterprises in the GBA can also share the best business practices of the publishing Ultimately, synergies could be industry. achieved. Additionally, Hong Kong publishers are also encouraged to expand the publishing market in the Mainland through importation and distribution of books published in Hong Kong.

Over the past years, the Government has also introduced various youth programs (i.e., Greater Bay Area Youth Employment Scheme, Funding Scheme for Youth Exchange in the Mainland, Thematic Youth Internship Programmes to the Mainland, etc.) to support Hong Kong youth to work in cities in the GBA. Print media and publishing enterprises should provide suitable internship and job opportunities for the youth in Hong Kong for sustainable manpower development.

Introduction of Public Lending Right

The provision of book lending services offered by Hong Kong Public Library would affect people's desire to buy books. Publishers suggest to introduce "Public Lending Right"⁹ (PLR) mechanism so that it can balance the social need for free public access to books against an author's right to be remunerated for the use of their work. PLR would also be viewed as a way to safeguard the rights and interests of authors as well as stimulate their incentives to continue creating. This could benefit the sustainable development of publishing industry in Hong Kong.

⁹ The public lending right is the legal right that allows authors and other right holders to receive payment from government to compensate for the free loan of their books by public and other libraries. Source: <u>https://www.wipo.int/wipo_magazine/en/2018/03/article_0007.html</u>

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Manpower Demand

Desk Research

The PPTB conducted the desk research between November 2021 and October 2022 to collect the job advertisements in the print media and publishing industries. A total of 2,592 recruitment advertisements were recorded. The top recruitment advertisement category (top jobs) is presented in Table 1.

Compared with the data collected for 2020 Manpower Survey Report of Print Media and Publishing industries, the 2021-22 desk research result is quite similar with the prominent vacancies in the print media and publishing industries recorded in 2020. Particularly, in view of growing popularity of online market, the focus group also supplemented that in the field of sales and marketing in both industries, the demand for personnel in digital marketing instead of traditional sales and marketing/ customers services is increasing in the coming future.

Table 1: Top Recruitment Advertisement Category (Top Jobs)

	Top Jobs (2021-22)		Top Vacancies (2020)	
Print Media Industry		Print Media Industry		
1.	Sales and marketing posts e.g.,	1.	Printing Machine Craftsman	
	Sales or Marketing/ Digital		(Offset Litho) (Sheet fed)	
	Marketing Manager or Executive	2.	Sales Representatives/	
2.	Printing posts e.g., Printing Sales		Customers Service Officer/ Job	
	Representatives, Print Media		Controller/ Marketing Staff	
	Sales Representatives and Sales Consultants etc.	3.	Pre-press Technician	
3.	Printing Craftsmen (Offset Litho; Sheet-fed; Web-fed)			

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	Top Jobs (2021-22)		Top Vacancies (2020)	
Publishing Industry		Publishing Industry		
1.	Editors related posts e.g., Editor,	1.	Editor/ Assistant Editors/ Art	
	Proof-reader, Feature Editor, etc.		Editor/ Proof-reader etc.	
2.	Sales and marketing posts e.g.,	2.	Sales Representative/ Sales	
	Sales or Marketing/ Digital		Executive	
	Marketing Manager or Executive,			
	etc.			
3.	Design related posts e.g.,			
	Publishing Designer, Book			
	Designer etc.			

As shown in Table 2, print media and publishing employers are eager to recruit practitioners with the following trade specific skills and emerging skills.

Table 2: Hot Skills on Demand

Trade Specific Skills					Emerging Skills	
Print Media Industry		Publishing Industry				
1.	Quality Assurance and Quality Control	1.	Translation	1.	Digital Marketing	
2.	Pre-press	2.	Editing	2.	E-commerce	
3.	Post press, Offset Printing	3.	Proof Reading	3.	Social Media Marketing Strategies	

The result indicated that the trade specific skills required by print media employers are more associated with the printing works whereas those skills required by publishing employers are mainly related to the requirements of editor posts.

Training Needs

Based on the trends and development of the industries coupled with the views from the focus group, the skill requirements of print media and publishing industries are listed as follows:

Trade Specific Skills

Digital Printing Techniques – In print media industry, practitioners are encouraged to keep abreast of the updated pre-press, printing and post-press techniques for printing operations. Some examples of digital printing techniques include:

- Pre-press processes: application of digital printing equipment, computer and software, i.e., Adobe Photoshop, Adobe InDesign, etc., troubleshooting etc.
- Post-press processes: finishing, i.e., laminating, embossing, debossing, hotstamping, different folding & binding, spot-UV, etc., cutting, i.e., digital/steel rule die cutting and laser cutting, application of software, e.g. computercontrolled CAD software, etc.

Quality Assurance & Quality Control – In print media industry, quality assurance and quality control are two of the most important elements of successful printing operations so as to boost the quality standards and practices. Printing personnel is required to be well equipped with the updated knowledge of quality assurance and quality control:

- Quality Assurance comprehensive planning and deployment for the whole process including raw materials, equipment, printing production, post processing, quality inspection and other technical consultation as well as quality management standards e.g., ISO standards
- Quality Control evaluation of the quality of performance through conducting test and inspection of products, services and processes.

Proof-reading Skills – In publishing industry, the editor is responsible for executing the publishing project. Proof reading remains one of the essential core skills which covers a number of professional knowledges and skills e.g., spelling and word choice, punctuation, stylistic consistency and formatting issues. It is recommended that editors should be well-equipped with the proof-reading skills.

Emerging Skills

Digital Marketing and Social Media Marketing Strategies Skills – For editors in publishing industry, apart from arranging publication's contents, they are also required to engage in more digital media works e.g., participate in online sales, live commerce to promote books/published works as well as produce short videos via social media platforms, etc. Therefore, it is recommended that editors should enhance the knowledge and skills in digital marketing and social media marketing strategies.

Generic Skills

Communication Skills – Frontline employees must possess good communication skills for providing good quality of services and professional advice to customers. **Project Management Skills** – Professional editors are the key persons in publishing industry, they need to play more complex role in a publishing company including the cross-team coordination with production, design and marketing departments. Apart from good understanding of trade-specific knowledge and skills, they should be able to possess good project management skills to ensure each part of the project is up to standard and within timeline.

Problem Solving Skills – Unexpected situation comes around in the post-pandemic era. Industry practitioners should be flexible and creative enough to come up with new solutions.

Challenges in Recruitment and Staff Retention

Public Perception of the Industries

The public often has the general misconception and labeled print media industry as "traditional craftmanship and oldfashioned" though its development has evolved and modernised over the past decades. Besides, young generation lacks the understanding about the development of industry such as market prospects, industries' requirements, articulation pathway, career development opportunities, etc. These reasons have adversely affected the desire of young people from entering the industry.

Expectation of Young Generation - Slashers

Young employees place great importance to "work-life balance". They appeal to shortterm benefits and immediate satisfaction. They also prefer to work as "slashers", i.e., people with multiple concurrent careers and identities rather than only a single career. They are unlikely to stay in the same company to acquire the knowledge and skills of the industries. Therefore, these younger generations are less loyal to long-term employment. Besides, these young people are more likely to pursue new experiences or run their own business, such as being a key opinion leader and running an online business, etc. All these factors have made it difficult for enterprises to nurture young employees to become talents with practical and technological skills.

Experienced Editors Leaving the Industry

The focus group observed that the wave of emigration impacted the publishing industry. For example, with an increasing number of teachers moved out from Hong Kong since western countries e.g., United Kingdom, Canada and Australia relaxed immigration pathways, many experienced editors would apply for the teaching posts and eventually change the field over the past years. Thus, the publishing industry suffers a lack of experienced professional editors.

Insufficient Information Technology and Digital Marketing Talents

To cope with the rapid technological development of print media and publishing industries, there is a high manpower demand for talents on information technology as well as digital marketing in the print media and publishing industries. In view of the above challenges in recruitment and staff retention, the industries face huge difficulties to recruit these talents to join the industries.

Attractive Remuneration Package Offered by Other Industries

The focus group reflected that the industries face extremely difficulties to attract new blood to join and retain staff in the print media and publishing industries in recent years. One of the major reasons is more attractive remuneration packages offered by other industries, e.g. security services as well as building and civil engineering.

RECOMMENDATIONS

To meet the development needs of the industries, it is considered essential for the Government, education/training institutions and employers to provide suitable training to the employees and students in the following areas:

Government

Continue Promote Reading Culture

To continue encourage children and young people to broaden and deepen their scope of reading, it is recommended that the Government and the Hong Kong Public Libraries could continue collaborate with the publishing industry and other stakeholders such as schools, community partners, etc. through organising different reading promotion activities e.g., inviting local authors to participate in major reading events.

Offer Support for Business Transformation

The Government should continue to step up support for developing information and technology infrastructure, pooling talent, assisting enterprises for undergoing reindustrialisation so as to enhance enterprises' productivity and upgrade / transform their business process as well as providing additional supports for enterprises to expand its business to overseas markets.

Education /

Training Institutions

Offer Academic Programmes for Potential Editors

Currently, there is no degree programme in publishing offered by education institutions in Hong Kong. Students who would enter the publishing industry would normally obtain relevant degree qualifications in journalism, communication or English related fields. To nurture more potential editors in future, it is recommended that education institutions could consider developing degree programmes in publishing.

Offer Professional Training for Proof-reading to Editors

In publishing industry, apart from editorial skills, editors should also be required to equip with good proof-reading skills. Education/training institutions should consider offering the professional and short training courses in proof-reading.

Strengthen Collaboration between Industries and Education / Training Institutions

To cope with the rapid development of the industries, education/training institutions should strengthen industry collaboration to design suitable training programmes with reference to the market requirements of print media and publishing industries as well as update its course contents in a timely manner (e.g. incorporating the updated knowledge and skills).

Employers

Rebrand the Image of Industries

To stay competitive, the industries should consider rebrand the image of print media and publishing targeting young people and relevant stakeholders. In order to attract more young generation to join the industries, employers should provide comprehensive information of industry prospects, career development pathways, opportunities for development, well offering attractive as as renumeration package to them.

Nurture Manpower for Print Media Industry

To cope with the latest digital trend of print media industry, printing companies would continue to diversify and offer different types of printed products (i.e., packaging and labels, cultural and creative products etc.), there is a need for printing talents. Printing enterprises are encouraged to actively engage and nurture manpower to support this development.

Enhance Communication Between Employers and Young Employees

To retain and nurture younger generation, more communications between employees management and young should be made. For examples, employers should listen young to employees so as to understand their thoughts and needs.

Make Good Use of Government Funding Schemes

Employers are encouraged to make use of different funding and subsidies schemes of Government i.e., SME Financing Guarantee Scheme and Digital Transformation Support Pilot Programme for meeting their business needs as well as helping them in business and digital transformation.

Employees

Keep Abreast of the Latest Knowledge of Industries

As the digital transformation of business process becomes an important trend, it requires a strong team to formulate the plan. Senior management of the publishing industry is encouraged to expand their horizon on the latest industry trend and development to facilitate the sustainable development of enterprises.

For employees in print media industry, recommended they are to keep themselves updated with the latest development of technology and trends in the industry, e.g. pre-press and postpress techniques in digital printing; international environmental standards e.g. FSC, ISO, etc. in green printing as well as ESG. They should also proactively offer suggestions to employers training on that would facilitate team performance.