

*2018 Manpower Survey of
the Transport and Logistics Industry*

Survey Report

2018 年運輸及物流業

人力調查報告

(Transport and Logistics Training Board)

(運輸及物流業訓練委員會)

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DEFINITION OF TERMS

| | |
|-----------------------|---|
| Employees | refer to all those working full-time and receiving regular pay from the establishment, including proprietors and partners working full-time. Those people who work on part-time basis or engaged in non-principal jobs of the Transport and Logistics Industry are excluded. |
| Establishment | is selected from 2 037 companies in the specified frame of about 18 156 companies under the transport and logistics industry in the Central Register of Establishments (CRE) maintained by the C&SD. |
| Manpower | refers to the total number of employees and the number of vacancies. |
| Principal Jobs | are defined by the training board in terms of five scopes of responsibilities in three job levels across 6 sectors (for details of principal jobs, please refer to Appendix 5). |
| Vacancy rate | is defined as the percentage of vacancies out of the total manpower (i.e. the total number of employees and the number of vacancies). “Vacancies” refer to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel at the survey reference date. |
| Wastage/turnover rate | is defined as the percentage of employees leaving their current jobs out of the total number of Transport and Logistics employees. “Wastage” refers to employees leaving the Transport and Logistics Industry and taking up positions of other industries, or leaving the industry for other reasons. |

詞彙釋義

| | |
|--------|--|
| 僱員 | 「僱員」是在機構內全職工作及定期支薪的人士，包括全職東主及合伙人。從事兼職工作或運輸及物流業非主要職務的人士不包括在內。 |
| 機構 | 「機構」指調查涵蓋的2 037間公司，選自機構單位記錄庫內約18 156間從事特定運輸及物流業務的企業。機構單位記錄庫由政府統計處負責管理。 |
| 人力 | 「人力」指僱員人數與空缺額之和。 |
| 主要職務 | 「主要職務」的定義由本會按六個業務界別內三個職級中五大職責範疇而訂立(主要職務詳見附錄5)。 |
| 空缺率 | 「空缺率」指空缺在總人力(即僱員人數與空缺額之和)所佔的百分比。「空缺」指在統計日期當天已懸空的職位，同時機構正積極招聘人手填補。 |
| 流失／流動率 | 「流失率／流動率」指運輸及物流業離職者在同業僱員總數中所佔的百分比。因轉行或其他原因而不再從事運輸及物流業者視為「流失」。 |

EXECUTIVE SUMMARY

Background

1. The Transport and Logistics Training Board of the Vocational Training Council conducts manpower surveys (MPS) regularly to collect up-to-date manpower information with a view to assessing the industry's manpower requirements and training needs. This report presents the findings of the MPS conducted between **September and December 2018**.

Survey Coverage

2. The survey covered principal jobs at Managerial, Executive/Supervisory, and Clerical/Craftsman/Operative levels. Comparing with the 2016 survey which only covered three sectors of Freight Transport, coverage of this survey was expanded to Passenger Transport. Please find the six sectors¹ covered in this survey below:

- (i) Freight Transport – Land (including Warehouse)
- (ii) Freight Transport – Sea (excluding Warehouse)
- (iii) Freight Transport – Air
- (iv) Passenger Transport – Land
- (v) Passenger Transport – Sea
- (vi) Passenger Transport – Air

3. The number of branches covered in this survey increased to 14 resulting from the extended scope. Branches 1 – 10 related to Freight Transport were covered in the 2016 survey while Branches 11 – 14 regarding Passenger Transport were newly added.

- Branch 1: Warehouse & Cold Storage
- Branch 2: Cargo Handling Terminals
- Branch 3: Trucking & Container Haulage
- Branch 4: Air Freight Transport
- Branch 5: Forwarding Agent
- Branch 6: Stevedoring Services
- Branch 7: Couriers (International)
- Branch 8: Sea Freight Transport
- Branch 9: Ship Management & Chartering
- Branch 10: Other Transport Logistics Service Providers
- Branch 11: Vehicle and Rail Operators
- Branch 12: Vessel Transport Operators
- Branch 13: Aviation Service Operators
- Branch 14: Taxi and Public Light Bus Drivers

¹ Readers should take note that seafarers are not included in this survey and the corresponding manpower information of seafarers are collected separately in the manpower surveys conducted by the Maritime Services Training Board.

Survey Methodology

4. A total of 2 037 establishments were selected and invited to take part in the survey by completing a structured questionnaire through face-to face or telephone interviews. Specific to Branch 14 “Taxi and Public Light Bus Drivers”, since most of them are employed on individual basis, information on the corresponding number of employees was directly obtained from the Motor Transport Workers General Union.

5. The data collection was carried out between September and December 2018. Among the valid samples, 881 were successfully enumerated and 264 refused, giving an effective response rate of 77%. Taking into account (i) the satisfactory response rate of individual branches, (ii) the fact that majority of prominent and sizeable establishments had responded to the survey, and (iii) the grossing-up of sample results basing on statistically-grounded method, it could be concluded that the survey findings presented in this report contributed to a significant level of representativeness of the industry.

6. The questionnaire was divided into Parts I and II. Part I was the major part of the questionnaire collecting manpower information (e.g. number of employees, vacancies) by three levels of principal jobs while Part II collected supplementary information related to manpower (e.g. staff turnover, preferred competency). The list of principal jobs in Part I of the questionnaire was defined by the Training Board with detailed job descriptions given for each job. While it was understood that some employees needed to perform multiple job functions at the same time, respondents were requested to report manpower information based on the major job function of respective employees.

7. To ensure the accuracy of survey findings, stringent quality assurance measures were applied at various stages of the survey, including thorough training of fieldwork staff, collection of data using an effective interactive online interviewing system, validation of collected data through built-in computer logical checks and programming, 100% vetting of questionnaires by a dedicated team of VTC, and so on.

Manpower Projection

8. The manpower requirement of Freight Transport was projected for 2019-2022 using “Labour Market Analysis (LMA)” (Please refer to Appendix 12 for more details). The LMA model has been applied to the Transport and Logistics Industry since 2002. It makes use of some relevant and reliable economic indicators to project manpower demand in the short and medium term.

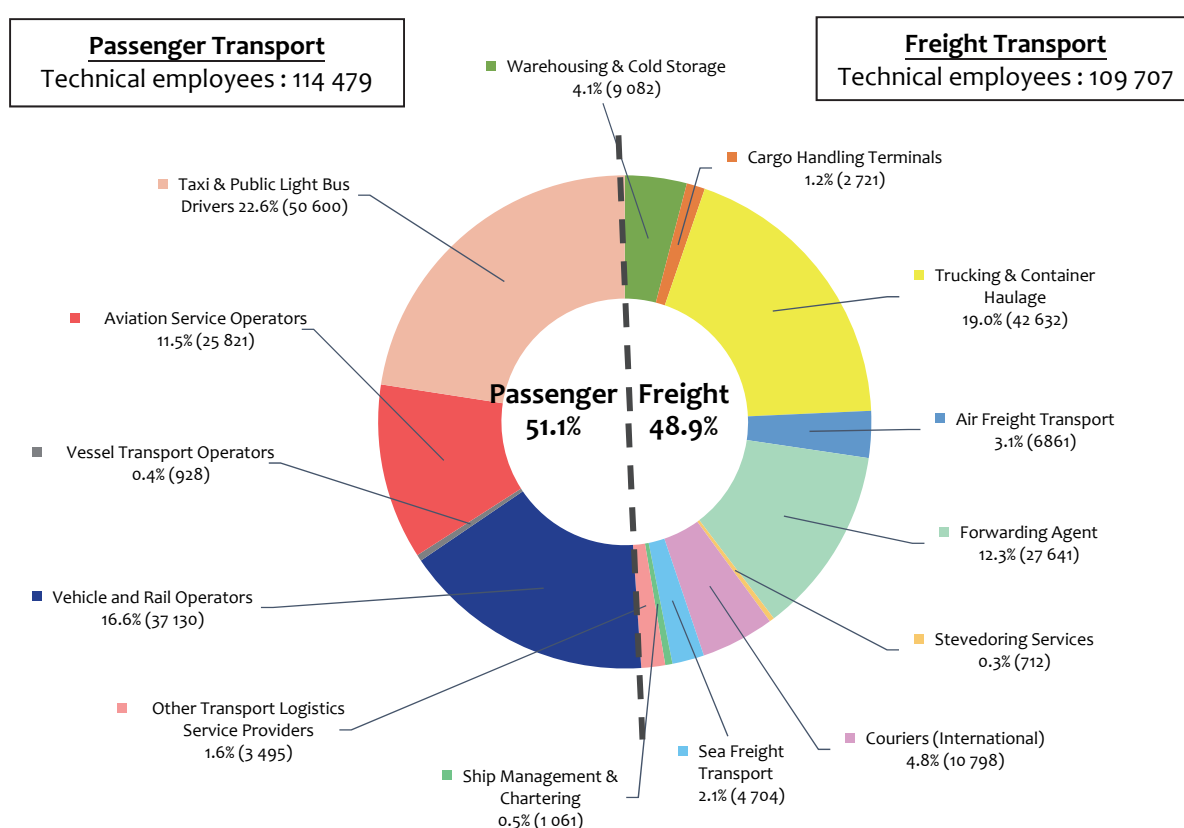
9. As for Passenger Transport, since it was the first time to include it in this periodic survey, historical data was not available for application of the LMA approach. Thus, forecast by employers for 2019 and 2020 was adopted for manpower projection of Passenger Transport.

Summary of Survey Findings

Overview of Transport and Logistics Industry

10. Overall speaking, there were 224 186 employees engaging in the Transport and Logistics Industry in September 2018, of which 51.1% (or 114 479 employees) were employed in Passenger Transport and the other 48.9% (or 109 707 employees) were working in Freight Transport. (Figure 1)

Figure 1: Distribution of Employees by Branch



11. Among different branches, “Taxi and Public Light Bus Drivers”² had the largest number of employees totaling 50 600 which made up 22.6% of the Transport and Logistics workforce, followed by “Trucking & Container Haulage” with 42 632 employees (19%) and “Vehicle and Rail Operators” with 37 130 employees (16.6%).

12. The majority of employees (72.7%) were at “Clerical/Craftsman/Operative” level, followed by 17.2% at “Executive/Supervisory” level and 10.1% at “Managerial” level. (Table 1)

² The total number of employees is the only available information of taxi and public light bus drivers in this survey. Unless otherwise stated, the manpower information/analysis presented below does not include these 50 600 taxi and public light bus drivers.

Table 1: Number of Employees by Job Level

| Job Level | No. of Employees | % of Total Number of Employees |
|------------------------------|-------------------------|---------------------------------------|
| Managerial | 17 585 | 10.1% |
| Executive/Supervisory | 29 834 | 17.2% |
| Clerical/Craftsman/Operative | 126 167 | 72.7% |
| Total | 173 586 | 100% |

(* Excluding 50 600 Taxi and Public Light Bus Drivers)

13. At the time of survey, employers reported 6 875 vacancies, representing a vacancy rate of 3.8%. Passenger Transport was noted to have a higher vacancy rate (4.6%) over Freight Transport (3.3%). By job level, “Clerical/Craftsman/Operative” level was observed with the highest number of vacancies of 5 488. By scopes of responsibilities, the highest number of vacancies was observed in the scope related to “Frontline Cargo Operation” (3 355) and “Frontline Passenger Operation” (2 341).

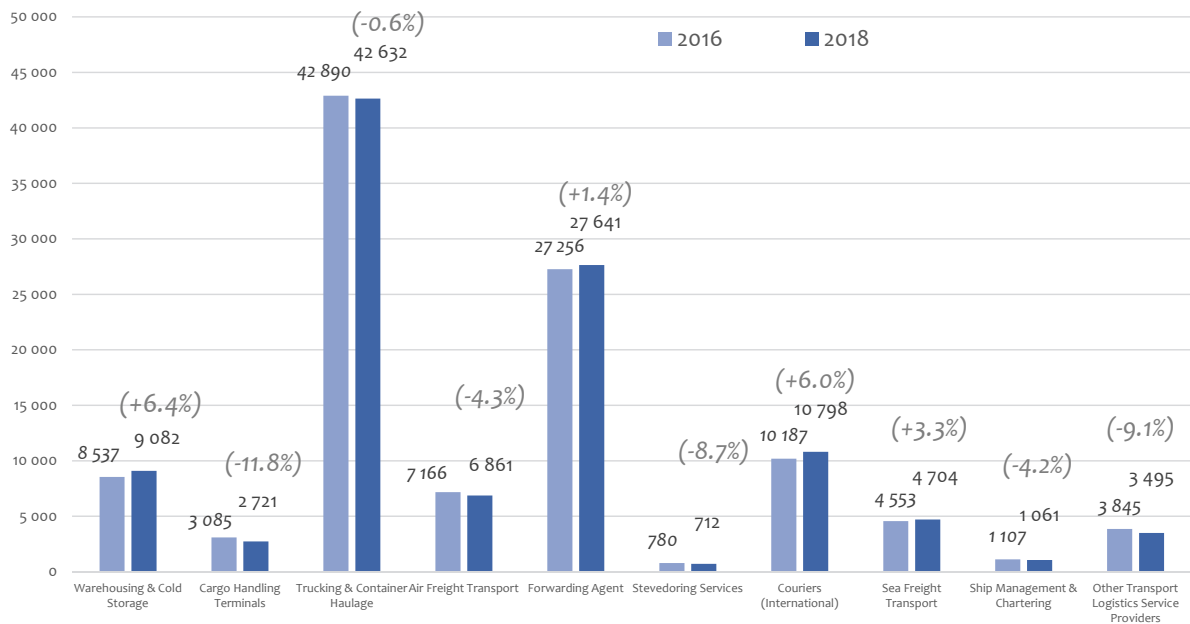
14. Employers were asked to provide the age distribution of their employees at “Clerical/Craftsman/Operative” level at the time of survey. It was observed that ageing problem of Passenger Transport was more serious than that of Freight Transport. 49.4% of the employees of Passenger Transport were aged 51 or above while only 22.1% of the employees of Freight Transport were at that age range. “Passenger Transport – Land” seemed to encounter the most acute ageing problem with 18.3% employees reaching the age of 61 or above.

Freight Transport

15. The survey revealed that a total of 109 707 employees were engaged in Freight Transport in September 2018 with most employees from “Trucking & Container Haulage (42 632 employees) and “Forwarding Agent” (27 641 employees).

16. When compared to the survey results in 2016, the number of Freight Transport employees was more or less the same, with a slight increase of only 0.3%. Specifically, while “Warehousing & Cold Storage” and “Couriers (International)” were recorded with a moderate growth of 6.4% and 6.0% respectively, noticeable decline was observed in “Cargo Handling Terminals” (-11.8%), “Other Transport Logistics Service Providers” (-9.1%) and “Stevedoring Services” (-8.7%). (Figure 2)

Figure 2: Change in Number of Employees (Freight Transport) by Branch



17. It was also noted that the number of employees at “Managerial” level increased by 3.5% while the number of employees at other two job levels remained stable over the past two years.

18. A total of 3 802 Freight Transport related vacancies were reported in this survey, representing a vacancy rate of 3.3%. Comparing with the 2016 survey, there was an increase in the number of vacancies by 961. In terms of branch, “Trucking & Container Haulage” was observed with the highest number of vacancies at 1 893. Among the three job levels, “Clerical/Craftsman/Operative” level had the highest number of vacancies at 3 473.

19. In the survey, employers were asked to forecast the number of Freight Transport employees in 2019 and 2020. The forecast indicated a very mild year-on-year growth in the manpower of Freight Transport, with a growth rate of 0.75% from 2018 to 2019, and a further growth of 0.23% from 2019 to 2020. (Table 2)

Table 2: Employers’ Manpower Forecast (Freight Transport) by Job Level

| Job Level | Manpower 2018 [^] | Manpower Forecast (growth rate) | |
|------------------------------|----------------------------|---------------------------------|------------------------|
| | | 2019 | 2020 |
| Managerial | 9 926 | 10 006 (0.81%) | 10 033 (0.27%) |
| Executive/Supervisory | 14 799 | 14 904 (0.71%) | 14 986 (0.55%) |
| Clerical/Craftsman/Operative | 88 784 | 89 447 (0.75%) | 89 604 (0.18%) |
| Total | 113 509 | 114 357 (0.75%) | 114 623 (0.23%) |

([^] Manpower refers to the total number of employees and the number of vacancies)

20. Regarding employers' preferred education level of employees, while most employers (64.7%) preferred their "Managerial" staff to have a first degree, nearly one-fourth employers (24.6%) accepted them to have a lower level of education (i.e. below Secondary 7).

21. As for employers' preferred competency of their employees, most employers would like their employees to be trained in the following functional areas:

- (i) Cargo Safety and Security
- (ii) Sales, Marketing and Customer Services
- (iii) Operation Management

Passenger Transport

22. The survey revealed that 114 479 employees were working in Passenger Transport in September 2018. Most of them were "Taxi and Public Light Bus Drivers" (i.e. 50 600). Excluding them, "Vehicle and Rail Operators" was the branch with the largest number of employees (i.e. 37 130). Since the number of employees was the only available information for taxi and public light bus drivers in this survey, please be reminded that other manpower information presented below does not include their corresponding information.

23. At the time of survey, a total of 3 073 vacancies, representing an overall vacancy rate of 4.6% was reported for Passenger Transport, of which "Vehicle and Rail Operator" was the branch with both the highest vacancy rate (4.9%) and the actual number of vacancies (1 914 vacancies). In terms of job level, "Clerical/Craftsman/Operative" level had the highest number of vacancies at 2 015.

24. Employers were asked to forecast the number of employees in Passenger Transport in 2019 and 2020. Similar to Freight Transport, the forecast indicated a very slight year-on-year growth in the manpower of Passenger Transport, with a growth rate of 0.55% from 2018 to 2019, and a further growth of 0.23% from 2019 to 2020. (*Table 3*)

Table 3: Employers' Manpower Forecast (Passenger Transport) by Job Level

| Job Level* | Manpower 2018 [^] | Manpower Forecast (growth rate) | |
|------------------------------|----------------------------|---------------------------------|-----------------------|
| | | 2019 | 2020 |
| Managerial | 8 040 | 8 042 (0.02%) | 8 041 (-0.01%) |
| Executive/Supervisory | 16 041 | 16 068 (0.17%) | 16 102 (0.21%) |
| Clerical/Craftsman/Operative | 42 871 | 43 209 (0.79%) | 43 328 (0.28%) |
| Total | 66 952 | 67 319 (0.55%) | 67 471 (0.23%) |

([^] Manpower refers to the total number of employees and the number of vacancies)

(* Excluding 50,600 taxi and public light bus drivers)

25. Regarding employers' preferred education level of employees, it was observed that the majority of employers preferred having holders of first degree as "Managerial" staff (96.2%) and "Executive/Supervisory" staff (80.6%). Comparing with Freight Transport, employers of Passenger Transport in general preferred their employees to have a higher level of education.

26. Regarding preferred competency of their employees, employers considered that training on the following areas was most required by their employees:

- (i) Customer Relationship/Complaints Handling
- (ii) Managerial/Supervisory/Coaching Skills/Strategic Management
- (iii) Sales and Marketing
- (iv) Handling of Emergency Incidents

Annual Training Requirement

27. Based on the projected annual growth rate and the wastage rate, the training requirements projected by the Training Board for Freight Transport and Passenger Transport are given in the tables below. (Tables 4A and 4B)

Table 4A: Average Annual Training Requirement (Freight Transport)
for the Next 4 Years (2019 – 2022)

| Job Level | Recommended Annual Requirement | Preferred Education Level |
|----------------------------------|--------------------------------|--|
| Managerial | 128 – 156 | First Degree or above (65.5%) |
| Executive/Supervisory | 330 – 404 | Sub-degree to First Degree (43.5%) Secondary 4 to Diploma/Certificate (54.8%) |
| Clerical/Craftsman/ Operative | 3 827 – 4 677 | Secondary 4 – 7 (49.8%) Secondary 3 or below (41.4%) |

Table 4B: Average Annual Training Requirement (Passenger Transport)
for the Next 2 Years (2019 – 2020)

| Job Level* | Recommended Annual Requirement | Preferred Education Level |
|------------------------------|---------------------------------------|----------------------------------|
| Managerial | 74 – 90 | First Degree (96.2%) |
| Executive/Supervisory | 324 – 396 | First Degree (80.6%) |
| Clerical/Craftsman/Operative | 1 890 – 2 310 | Secondary 7 or below (75.1%) |

(* Excluding 50,600 taxi and public light bus drivers)

Recommendations

28. Based on the survey findings and the business outlook of the industry, the Training Board has furnished the following recommendations:

New Business Opportunities

- (i) Industry practitioners should keep abreast of the latest development of the Greater Bay Area (GBA) and be more proactive in exploring new business opportunities there;
- (ii) Training providers may arrange exchange or workplace attachment opportunities in GBA to their students;
- (iii) Industry associations and the Training Board may join hands to organise seminars and forums to provide platforms for industrial practitioners to share their insights in new markets.

Embracing Innovative Technology

- (iv) Employers should take a proactive role to integrate new technology (e.g. Big Data, AI, robotic) into their business since the boom in e-commerce drives drastic changes to logistics arrangement. They may consider partnering with companies that offer technological solutions if they do not have relevant expertise themselves.

Attracting Young People into the Industry

- (v) The industry should step up promotion efforts to uplift the image of the industry and remove the dated misconception on its job nature which deters new blood from joining. Possible platforms could be used include the Education Bureau’s Business-School Partnership Programme (BSPP) which offers career exploration activities to secondary school students and teachers.

- (vi) Employers are encouraged to help their employees to obtain recognised qualifications (e.g. QF-recognised qualifications) to foster a higher level of professionalism of the industry.
- (vii) Employers are recommended to make good use of the Maritime and Aviation Internship Network under the Maritime and Aviation Training Fund to offer the younger generation the opportunities to have an early exposure to the career opportunities in the Transport and Logistics Industry.

Training Needs of Employees

- (viii) Training providers are encouraged to make use of the subsidised schemes available to offer suitable training to in-service practitioners, especially new technology applicable to the industry and the most required competencies identified in the survey.
- (ix) Employers should also encourage/help their employees to enhance digital literacy to cope with the technological innovations of the industry.

Alleviation of Manpower Shortage

- (x) Employers should employ new operation mode/technology to reduce manual work and enhance efficiency.
- (xi) Employers are advised to offer more competitive remuneration packages as well as progression paths to attract talent. For jobs with limited room for promotion, employers should try to establish a better working environment and working relationship with employees to help retain talent.
- (xii) Both the Government and employers should introduce measures to support re-engagement of older workers, and encourage participation of women and other less privileged groups into the labour market.

報告摘要

背景

1. 運輸及物流業訓練委員會（下稱「本會」）隸屬職業訓練局[VTC]，定期進行調查蒐集最新人力資料，據此評估業內人力需求及培訓需要。本報告載述 **2018年9月至12月**期間進行人力調查所得的結果。

調查範圍

2. 調查涵蓋「經理」、「行政／主任」、「文員／技工／操作工」三個職級的主要職務。2016年調查只涵蓋三個貨運業務界別，而是次調查則延伸至客運業，共覆蓋以下六大類別³：

- (i) 貨運－陸運（包括倉庫）
- (ii) 貨運－海運（不包括倉庫）
- (iii) 貨運－空運
- (iv) 客運－陸運
- (v) 客運－海運
- (vi) 客運－空運

3. 是次調查擴大了覆蓋範圍，所涵蓋的門類增至 14 個。門類 1 至 10 與貨運相關，屬 2016 年調查的範圍；門類 11 至 14 則與客運相關，屬本調查新涵蓋的門類。

- 門類 1： 貨倉及冷藏庫
- 門類 2： 貨運站
- 門類 3： 貨車及貨櫃運輸
- 門類 4： 空運承運
- 門類 5： 貨運代理
- 門類 6： 船上／碼頭裝卸貨物
- 門類 7： 國際速遞
- 門類 8： 海運承運
- 門類 9： 船舶管理及租賃
- 門類 10： 其他物流服務經營者
- 門類 11： 車輛及鐵路客運經營者
- 門類 12： 水上客運經營者
- 門類 13： 航空客運經營者
- 門類 14： 的士及公共小巴司機

³ 海員並未納入是次調查，因為相關人力數據過往是由海事服務業訓練委員會進行的調查蒐集所得。

調查方法

4. 本會共抽選並邀請 2 037 間機構參與調查，透過面對面或電話訪問填寫妥善設計的問卷。至於門類 14「的士及公共小巴司機」，由於大部分屬自僱人士，相關僱員人數直接取自汽車交通運輸業總工會。

5. 是次人力調查於 2018 年 9 月至 12 月期間蒐集數據。在有效的樣本機構中，共有 881 間順利取得統計資料，另有 264 間不允提供資料，有效回應率為 77%。本會觀察到以下幾點：(i) 各門類的回應率令人滿意；(ii) 公眾熟識和具規模的機構大多回應了調查；(iii) 從樣本機構調查所得的結果可運用統計學方法倍大。本會總結所得，認為本報告書所載的調查結果足以反映本業的人力情況。

6. 問卷分為兩部分，第一部分蒐集主要職務三個職級的人力資料（如僱員人數及空缺額）；第二部分蒐集人力補充資料（如僱員流動情況及宜有能力）。問卷第一部分所列的「主要職務工作說明」由本會編製，詳述每個職務的工作。由於有些僱員需要同時負責多項職務，僱主需根據個別僱員的主要職責，填報其人力資料。

7. 為確保得出準確的調查結果，本會於調查各階段採取嚴格的質素保證措施，包括為調查人員提供充足培訓、運用有效的網上互動訪問系統蒐集數據、透過內置電腦邏輯檢查及編程核對蒐集所得的數據、由 VTC 專責組別對問卷進行百分百檢查等。

人力預測

8. 本會採用人力市場分析法 [LMA]，預測 2019 年至 2022 年貨運僱員人力需求（詳見附錄 12）。運輸及物流業自 2002 年起已採用 LMA，透過一系列可靠的相關經濟指標，預測中短期人力需求。

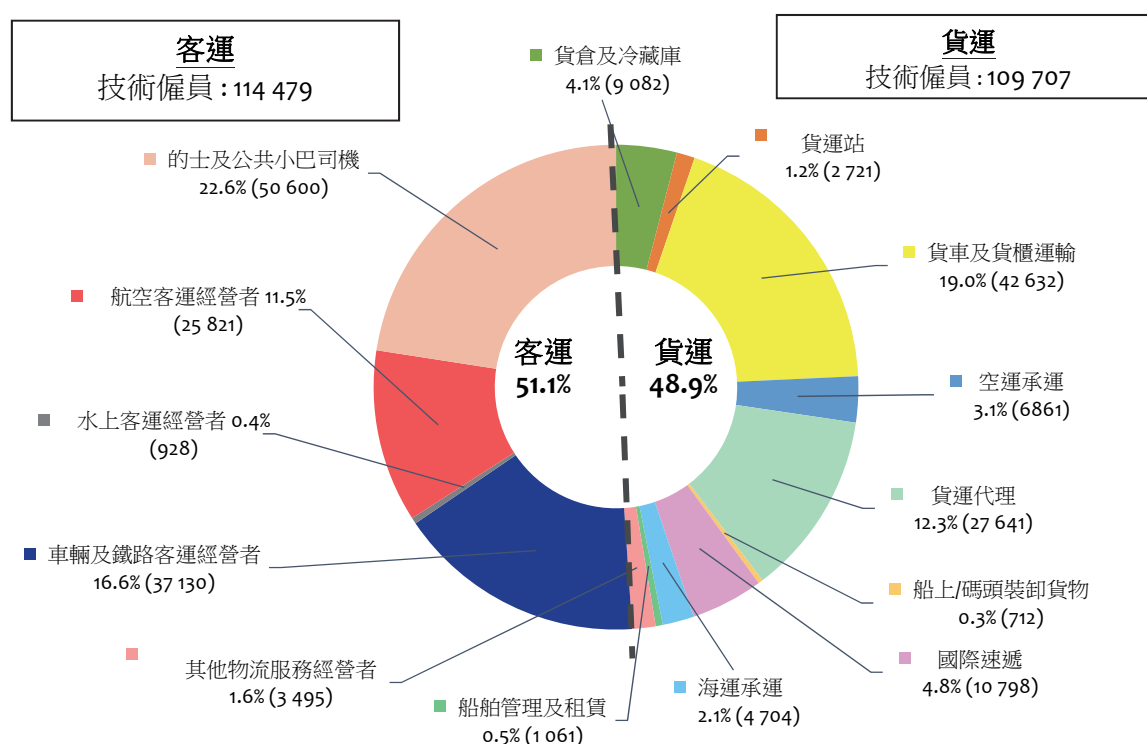
9. 是次定期調查首次涵蓋客運業，因此沒有過往數據可用於人力市場分析。客運業的人力估算僅根據僱主對 2019 及 2020 年的人力預測而定。

調查結果摘要

運輸及物流業概況

10. 整體而言，2018年9月運輸及物流業共有224 186名僱員。其中，114 479人(51.1%)來自客運業；109 707人(48.9%)來自貨運業。(圖1)

圖1：各門類僱員分布情況



11. 在不同門類當中，「的士及公共小巴司機」⁴的僱員人數最多，共有50 600人，佔運輸及物流業僱員22.6%，其次為「貨車及貨櫃運輸」及「車輛及鐵路客運經營者」，分別有42 632(19%)及37 130(16.6%)名僱員。

12. 大多數僱員(72.7%)屬「文員／技工／操作工級」，其次有17.2%屬「行政／主任級」，10.1%屬「經理級」。(表1)

⁴ 是次調查僅錄得的士及公共小巴司機的僱員總數。除非另有註明，否則下文所述之人力資料／分析並不包括在此提及的50 600名的士及公共小巴司機。

表 1：各職級僱員人數

| 職級 | 僱員人數 | 佔僱員總數百分比 |
|-----------|---------|----------|
| 經理 | 17 585 | 10.1% |
| 行政／主任 | 29 834 | 17.2% |
| 文員／技工／操作工 | 126 167 | 72.7% |
| 總數 | 173 586 | 100% |

(*不包括 50 600 名的士及公共小巴司機)

13. 調查期間，僱主填報共有 6 875 個空缺，相等於 3.8% 空缺率。客運的空缺率有 4.6%，較貨運(3.3%) 為高。按職級劃分，「文員／技工／操作工級」的空缺額最多，有 5 488 個。以職責範疇而言，「貨物調度、前線操作」及「乘客運輸、前線操作」的空缺額最多，分別為 3 355 個及 2 341 個。

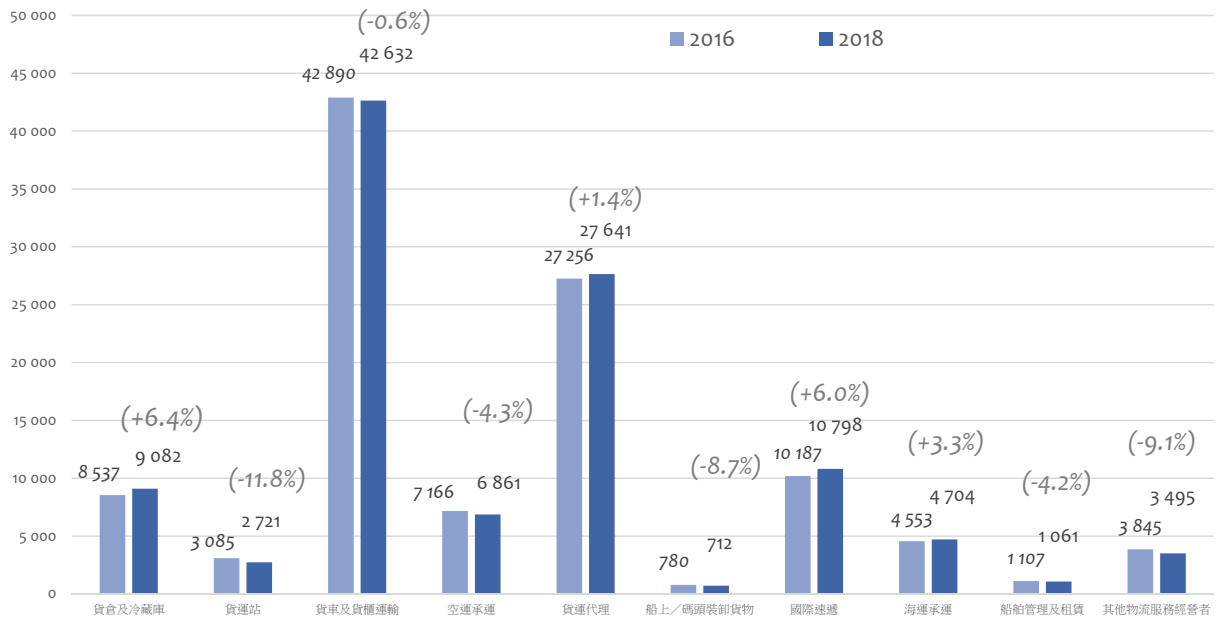
14. 本會請僱主提供「文員／技工／操作工級」員工在調查期間的年齡分布情況。據所得資料，客運僱員老化問題比貨運業更嚴重。49.4% 的客運僱員年齡在 51 歲或以上，而貨運僱員當中只有 22.1% 處於該年齡組別。「客運 – 陸運」業務界別的僱員老化問題似乎最為嚴峻，18.3% 的僱員年齡達到 61 歲或以上。

貨運

15. 調查顯示，2018 年 9 月共有 109 707 名僱員任職貨運業。其中，「貨車及貨櫃運輸」的僱員人數最多，有 42 632 人，其次為「貨運代理」，有 27 641 人。

16. 與 2016 年調查結果相比，「貨運」僱員人數相若，僅微增 0.3%。當中，「貨倉及冷藏庫」及「國際速遞」的僱員人數錄得溫和增長，增幅分別為 6.4% 和 6.0%；而「貨運站」、「其他物流服務經營者」及「船上／碼頭裝卸貨物」的僱員人數則顯著減少，減幅分別為 -11.8%、-9.1%及 -8.7% (圖 2)

圖 2：貨運 - 各門類僱員人數變化



17. 另外，「經理級」的僱員數目增加了 3.5%，而其他兩個職級的僱員數目在過去兩年維持穩定。

18. 調查顯示，貨運業共有 3 802 個職位空缺，空缺率為 3.3%。與 2016 年調查相比，空缺數目增加了 961 個。按門類劃分，「貨車及貨櫃運輸」的空缺額最多，共有 1 893 個空缺。在三個職級當中，空缺最多的是「文員／技工／操作工級」，共有 3 473 個。

19. 是次調查請僱主預測貨運業於 2019 年及 2020 年的僱員人數。結果顯示，貨運業的按年人力增長非常溫和，2018 至 2019 年料微增 0.75%，2019 至 2020 年僅增加 0.23%。（表 2）

表 2：貨運 - 僱主預測各職級人力

| 職級 | 2018 年人力 [^] | 人力預測（增長率） | |
|-----------|-----------------------|------------------------|------------------------|
| | | 2019 年 | 2020 年 |
| 經理 | 9 926 | 10 006 (0.81%) | 10 033 (0.27%) |
| 行政／主任 | 14 799 | 14 904 (0.71%) | 14 986 (0.55%) |
| 文員／技工／操作工 | 88 784 | 89 447 (0.75%) | 89 604 (0.18%) |
| 總數 | 113 509 | 114 357 (0.75%) | 114 623 (0.23%) |

([^] 人力指僱員總數及空缺額之和)

20. 僱員宜有教育程度方面，大部分僱主 (64.7%) 要求「經理級」員工持有大學學位；另一方面，有近四分之一僱主 (24.6%) 接受此職級的員工具備較低教育程度（即中七以下）。

21. 至於僱員宜有能力，僱主認為僱員最需要以下職能範疇的訓練：

- (i) 貨物安全及保安
- (ii) 營銷、市場推廣及客戶服務
- (iii) 營運管理

客運

22. 調查顯示，在 2018 年 9 月，共有 114 479 名僱員任職客運業，當中大部分為的士及公共小巴司機，共 50 600 人。除此以外，「車輛及鐵路客運經營者」的僱員人數最多，共 37 130 人。需留意的是，是次調查只提供的士及公共小巴司機的僱員人數，其他相關人力情況並不包括在下述的資料內。

23. 據受訪機構填覆，調查時客運業共有 3 073 個空缺，相等於 4.6% 整體空缺率。其中，「車輛及鐵路客運經營者」的空缺率最高 (4.9%)，實際空缺額亦最多，共 1 914 個。就職級而言，「文員／技工／操作工級」的空缺額最多，共 2 015 個。

24. 本會請僱主預測客運業於 2019 年及 2020 年的僱員人數。與貨運業相若，客運業僱主預期 2019 年及 2020 年的按年人力增長非常輕微，2018 至 2019 年料微增 0.55%，2019 至 2020 年僅增加 0.23%。（表 3）

表 3：客運 - 僱主預測各職級人力

| 職級* | 2018 年人力 [^] | 人力預測 (增長率) | |
|-----------|-----------------------|-----------------------|-----------------------|
| | | 2019 年 | 2020 年 |
| 經理 | 8 040 | 8 042 (0.02%) | 8 041 (-0.01%) |
| 行政／主任 | 16 041 | 16 068 (0.17%) | 16 102 (0.21%) |
| 文員／技工／操作工 | 42 871 | 43 209 (0.79%) | 43 328 (0.28%) |
| 總數 | 66 952 | 67 319 (0.55%) | 67 471 (0.23%) |

([^] 人力指僱員總數及空缺額之和)

(*不包括 56,000 名的士及公共小巴司機)

25. 僱員宜有教育程度方面，據本會觀察，大部分僱主要求「經理級」員工 (96.2%) 及「行政／主任級」員工 (80.6%) 持有大學學位。與貨運業相比，客運業僱主一般要求員工具備較高教育程度。

26. 至於僱員宜有能力，僱主認為僱員最需要以下範疇的訓練：

- (i) 客戶關係／投訴處理
- (ii) 管理／督導／訓練技巧／策略管理
- (iii) 銷售及市務推廣
- (iv) 突發事情應變

每年培訓需求

27. 本會根據每年預測增長率和流失率，估計貨運業和客運業的培訓需求；詳見下表（表 4A 及表 4B）。

表 4A：貨運 - 未來四年平均每年培訓需求（2019 年至 2022 年）

| 職級 | 建議每年需求 | 宜有教育程度 |
|------------|---------------|--------------------------------------|
| 經理級 | 128 – 156 | 學士學位或以上 (65.5%) |
| 行政／主任級 | 330 – 404 | 副學位至學士學位 (43.5%) 中四至文憑／證書 (54.8%) |
| 文員／技工／操作工級 | 3 827 – 4 677 | 中四至中七 (49.8%) 中三或以下 (41.4%) |

表 4B：客運 - 未來兩年平均每年培訓需求（2019 年至 2020 年）

| 職級* | 建議每年需求 | 宜有教育程度 |
|------------|---------------|---------------|
| 經理級 | 74 – 90 | 學士學位 (96.2%) |
| 行政／主任級 | 324 – 396 | 學士學位(80.6%) |
| 文員／技工／操作工級 | 1 890 – 2 310 | 中七或以下 (75.1%) |

(不包括 56,000 名的士及公共小巴司機)

建議

28. 因應調查結果和行業未來的業務展望，本會有以下建議：

開發新機遇

- (i) 從業員宜密切留意大灣區的最新發展，更積極在區內探索新商機；
- (ii) 培訓機構宜為學生提供大灣區的交流及工作實習機會；
- (iii) 行業協會及本會可攜手舉辦研討會和論壇，讓從業員透過這些平台，分享對開拓新市場的灼見。

支援創新科技應用

- (iv) 因應電子商務蓬勃發展，令物流操作流程大幅改變，僱主宜積極應用科技（例如大數據、人工智能及機械人等）到日常業務中。如公司內部未有相關專才，他們亦可考慮與提供技術解決方案的機構合作。

吸引年輕新血

- (v) 業界宜加強宣傳以提升行業形象，消除社會對業內工作性質的過時誤解，否則會令新人卻步。教育局的商校合作計劃是其中一個可行的平台，可為中學生及教師提供職業探索活動。
- (vi) 僱主可考慮協助其僱員獲取認可資歷（例如資歷架構認可的資歷），進一步提升業界專業性。
- (vii) 僱主亦宜善用「海運及空運人才培訓基金」[MATF] 的海運和航空業實習計劃，為年輕一代提供實習機會，讓他們儘早認識相關行業。

從業員的培訓需要

- (viii) 培訓機構應宜善用現有的各項資助計劃，為從業員提供適切培訓，特別是適用於運輸及物流業的新科技，以及調查所顯示僱員最需要具備的能力。
- (ix) 僱主亦宜鼓勵／協助僱員提高數碼素養，緊貼行業採用的創新科技。

紓緩人力短缺

- (x) 僱主宜應用新的營運模式或科技，以減少體力勞動工作和提升工作效率。
- (xi) 僱主亦宜提供更具競爭力的聘用條件及晉升階梯，以吸引人才入行。對於晉升空間有限的工作，僱主可嘗試營造更佳的工作環境，並與僱員建立良好工作關係，以挽留人才。
- (xii) 政府和僱主均應推行措施，支援較年長人士重投職場，以及協助婦女及其他弱勢社群投入勞工市場。

I. INTRODUCTION

Background

1.1 The Transport and Logistics Training Board of the Vocational Training Council is required by its terms of reference to determine the manpower demand of the industry and to make recommendations to the Council for the development of training facilities to meet the demand. The Training Board comprises members nominated by major trade associations, labour unions, professional bodies, educational/training institutions and government department. The Training Board's membership and terms of reference are listed in *Appendices 1 and 2* respectively.

1.2 In pursuance of its terms of reference, the Training Board conducted the Manpower Survey (the survey) of the Transport and Logistics Industry from **September to December 2018** to collect up-to-date manpower information with a view to assessing the industry's manpower requirements and training needs. This report presents the findings of the survey concerned.

Survey Objective

1.3 The objective of the survey is to collect the latest manpower information of the Transport and Logistics Industry. Specifically, the survey aims –

- (a) to assess the manpower situation of the industry at the time of survey;
- (b) to forecast the numbers of employees in 2019 and 2020;
- (c) to estimate the training needs of the employees; and
- (d) to recommend to the Council the development of training strategies to meet such needs.

Survey Coverage

1.4 The sampling frame of this survey covered transport and logistics firms and other companies which have business in transport and logistics sector. Comparing with the 2016 survey which only covered three sectors of Freight Transport, coverage of this survey was expanded to Passenger Transport. Please find the six sectors covered in this survey below:

- (i) **Freight Transport – Land (including Warehouse)**
- (ii) **Freight Transport – Sea (excluding Warehouse)**
- (iii) **Freight Transport – Air**
- (iv) **Passenger Transport – Land**

(v) **Passenger Transport – Sea**

(vi) **Passenger Transport – Air**

1.5 The number of branches covered in this survey increased to 14 resulting from the extended scope. Branches 1 – 10 related to Freight Transport were covered in the 2016 survey while Branches 11 – 14 regarding Passenger Transport were newly added.

Branch 1: Warehouse & Cold Storage

(i) General Cargo Warehouses & Other Storage Services (HSIC⁵ 5212)

(ii) Cold Storage (HSIC 5211)

(iii) Packing and Crating Services & Cargo Inspection, Sampling and Other Storage Services (HSIC 522904, 522905)

Branch 2: Cargo Handling Terminals

(iv) Cargo Handling Terminals (HSIC 522201)

Branch 3: Trucking & Container Haulage

(v) Land Freight Transport by Good Vehicles and Land Freight Transport, n.e.c. (HSIC 4927, 522103, 522903)

(vi) Haulage of Containers & Container Leasing (HSIC 4928, 522204)

(vii) Supplementary Samples - Large Vehicle Fleet Owner Companies

Branch 4: Air Freight Transport

(viii) Airline Companies and Supporting Services to Air Transport (HSIC 5223, 510202)

Branch 5: Forwarding Agent

(ix) Air Cargo Forwarding Services (HSIC 522901)

(x) Sea Cargo Forwarding Services (HSIC 522902)

Branch 6: Stevedoring Services

(xi) Stevedore and Supporting Services to Water Transport, n.e.c. (HSIC 522202)

Branch 7: Couriers (International)

(xii) Couriers (International) (HSIC 5321)

Branch 8: Sea Freight Transport

(xiii) Ship Agents & Managers (HSIC 5011, 5012)

(xiv) Operators of Sea-going Vessels (HSIC 501402)

⁵ HSIC denotes Hong Kong Standard Industrial Classification.

Branch 9: Ship Management & Chartering

- (xv) Ship Owners of Sea-going Vessels (HSIC 501302, 501502)
- (xvi) Shipbrokers (HSIC 522906)
- (xvii) Inland Water Freight Transport (HSIC 5022)

Branch 10: Other Transport Logistics Service Providers

- (xviii) Supplementary Samples

Branch 11: Vehicle and Rail Operators

- (xix) Public Bus (HSIC 492100)
- (xx) School Bus (HSIC 492500)
- (xxi) Railway and Cable Transport (HSIC 491000)
- (xxii) Rental of Passenger Vehicles with Drivers (HSIC 492601, 492602)

Branch 12: Vessel Transport Operators

- (xxiii) Sea Transport Services (including Pearl River Delta) (HSIC 501301, 501401, 501501, 502101, 502199)

Branch 13: Aviation Service Operators

- (xxiv) Hong Kong-based Airline and Helicopter Companies (HSIC 5101)
- (xxv) Local Representative Offices of Overseas Airline Companies (Passenger) (HSIC 510201)

Branch 14: Taxi and Public Light Bus Drivers

- (xxvi) Supplementary data collected through labour union

Sample Design

1.6 The sample design and selection were done by the Census & Statistics Department (C&SD) of the HKSAR in collaboration with the VTC. To ensure the selection of a representative sample and to facilitate subgroup analysis, a total of 2 037 establishments were invited for survey. Out of these 2 037 establishments, 2 009 were selected by C&SD from the Central Register of Establishments (CRE)⁶ using a statistically scientific method of stratified random sampling (comprising strata of establishments stratified by three levels which were sector, branch and employment size). 26 companies (supplementary sample) was

⁶ The Census and Statistics Department maintains a computerised Central Register of Establishments which contains information relating to some 400 000 active establishments in Hong Kong. Information kept in the Register is updated on a quarterly basis through feedback from various surveys of the department and administrative returns from relevant government departments.

recommended for inclusion in the survey by the Training Board. These companies were prominent companies of other business natures which also employed transport and logistics employees, such as trading companies operating their own vehicle fleet for transportation of goods. The remaining 2 companies were newly identified during the fieldwork.

Questionnaire Design

1.7 Survey data were collected through the use of a structured questionnaire. Eight separate questionnaires were designed to cater for the establishments engaged in different sectors:

- (a) Freight Transport – Land (FL)
- (b) Freight Transport – Sea (FS)
- (c) Freight Transport – Air (FA)
- (d) Passenger Transport – Land (PL)
- (e) Passenger Transport – Sea (PS)
- (f) Passenger Transport – Air (PA)
- (g) Freight Transport – Land/Sea/Air (F3) (*for establishments with business across land, sea and air freight sectors*)
- (h) Freight/Passenger Transport – Air (PF) (*for establishment with business in both freight and passenger transport*)

1.8 Sample of questionnaire, explanatory notes and job descriptions for principal jobs are given in *Appendix 5*.

Data Collection Method

1.9 A survey pack, containing a notification letter and a survey questionnaire, together with the explanatory notes and a list of principal jobs with job descriptions, was mailed to each of the invited establishments one week before the fieldwork. Responsible persons of the establishments were asked to provide information regarding the manpower situation in their establishments on the survey reference date (i.e. 1 September 2018).

1.10 In respect of manpower information, 5 Scopes of Responsibilities and 3 Job Levels were classified for the Transport and Logistics Industry:

5 Scopes of Responsibilities:

- (a) Business Management, Strategic Planning
- (b) Fleet Operation and Management
- (c) Sales and Customer Service
- (d) Frontline Cargo/Passenger Operation
- (e) Technical/Engineering Support

3 Job Levels:

- (i) Managerial Level
- (ii) Executive/Supervisory Level
- (iii) Clerical/Craftsman/Operative Level

1.11 The list of principal jobs in Part I of the questionnaire was defined by the Training Board with detailed job descriptions given for each job. While it was understood that some employees needed to perform multiple job functions at the same time, respondents were requested to report manpower information based on the major job function of respective employees.

1.12 During the fieldwork period, enumerators made telephone contacts with or visited individual establishments to assist respondents in completing questionnaires or to collect the completed ones.

Quality Control Measures

1.13 Various measures were taken to assure the quality of the survey data collected. These included prior fieldwork preparation, thorough training of fieldwork staff, monitoring of the fieldwork execution, measures to increase the response rate, checking of the completed questionnaires, double data entry and validation of the collected data.

Fieldwork Period and Enumeration Results

1.14 Data collection was carried out between September and December 2018. Among the valid samples, 881 were successfully enumerated and 264 refused, giving an effective response rate of 77%.⁷ Taking into account (i) the satisfactory response rate of individual branches, (ii) the fact that majority of prominent and sizeable establishments had responded to the survey, and (iii) the grossing-up of sample results basing on statistically-grounded method, it could be concluded that the survey findings presented in this report contributed to a significant level of representativeness of the industry.

Rounding of Figures

1.15 Figures presented in this report may not add up to their totals due to rounding.

⁷ *Invalid samples include establishments which suspended operation, engaged in irrelevant trade or had not employed any transport and logistics staff and so on. Effective response rate is calculated by the sum of "Response" and "Partial Response" divided by this sum plus "Refusal".*

Limitations

1.16 The HSIC relies on the declaration by the companies on their business nature. The manpower information collected in this survey could not reflect that of the sub-contractors which were not registered as transport and logistics companies.

1.17 For “Passenger Transport – Land”, the majority of taxi and public light bus drivers are self-employed. Estimated number of taxi and public light bus drivers was obtained from the Motor Transport Workers General Union. Other manpower information such as preferred education level, staff turnover, preferred competencies and manpower projection was not available in this case.

1.18 Since it was the first time to cover Passenger Transport in the survey, no historical figures were available for comparison and adoption for use in the Labour Market Analysis. Thus, the manpower projection for Passenger Transport was solely based on employers’ forecast.

1.19 Seafarers are out of the scope of this survey since relevant manpower data used to be collected through the surveys conducted by the Maritime Services Training Board. When referring to the data relevant to sea transport, it should be noted that manpower information of seafarers is not included.

II. SURVEY FINDINGS

A. Overview of the Transport and Logistics Industry

Establishment in the industry

2.1 The distribution of establishments of the industry, including both Freight Transport and Passenger Transport, is shown in Table 2.1. Comparing with the 2016 survey, the number of Freight Transport establishments decreased by 362. Among different branches, “Trucking & Container Haulage” recorded the most significant decrease in the number of establishments (i.e. from 8 531 establishments in 2016 to 7 845 in 2018).

Table 2.1: Distribution of Establishments

| Branch* | No. of Establishments |
|---|-----------------------|
| <i>Freight Transport</i> | |
| Warehousing & Cold Storage | 793 |
| Cargo Handling Terminals | 7 |
| Trucking & Container Haulage | 7 845 |
| Air Freight Transport | 71 |
| Forwarding Agent | 3 166 |
| Stevedoring Services | 80 |
| Couriers (International) | 157 |
| Sea Freight Transport | 248 |
| Ship Management & Chartering | 150 |
| Other Transport Logistics Service Providers | 13 |
| Sub-total | 12 530 |
| <i>Passenger Transport</i> | |
| Vehicle and Rail Operators | 1 183 |
| Vessel Transport Operators | 57 |
| Aviation Service Operators | 94 |
| Sub-total | 1 334 |
| Total | 13 864 |

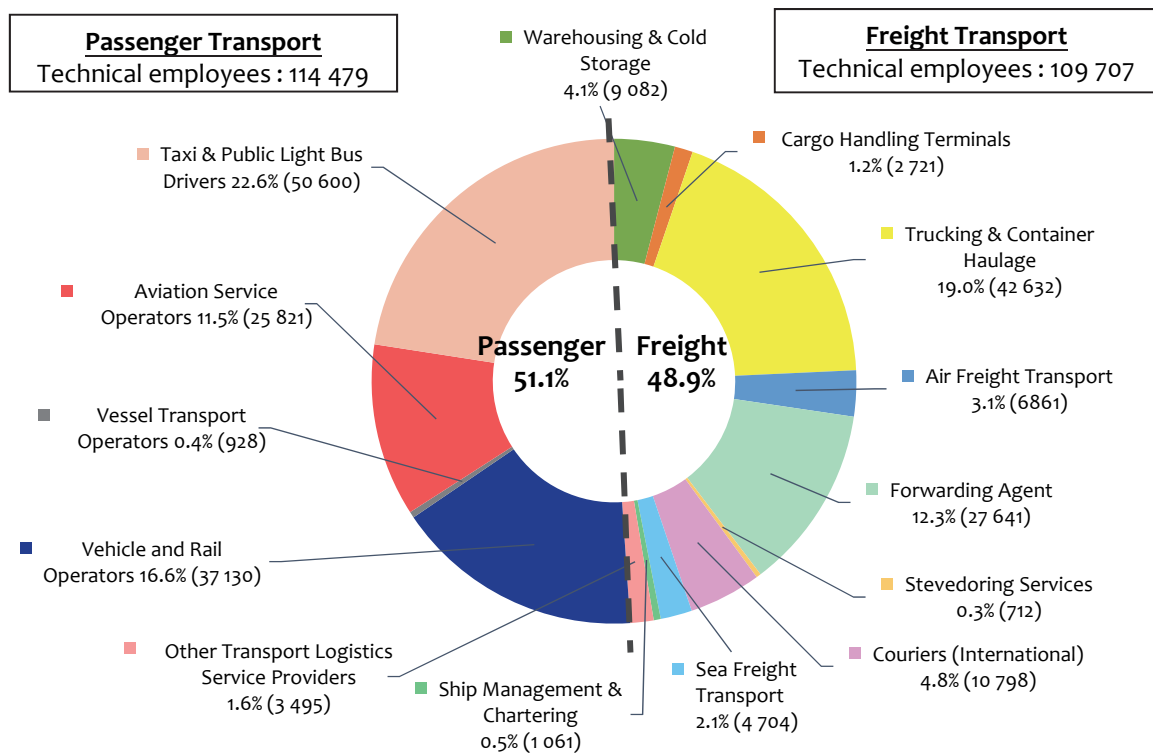
(* Excluding Taxi and Public Light Bus drivers who are mostly self-employed)

Number of Employees

2.2 The survey revealed that in September 2018, there were 224 186 employees serving in the Transport and Logistics Industry, which accounted for about 5.6% of the total working population in Hong Kong⁸. Among them, 109 707 (48.9%) were from Freight Transport and the remaining 114 479 (51.1%) were from Passenger Transport.

2.3 Among different branches, “Taxi and Public Light Bus Drivers” had the largest number of employees totaling 50 600 which made up 22.6% of the Transport and Logistics workforce, followed by “Trucking & Container Haulage” with 42 632 employees (19%) and “Vehicle and Rail Operators” with 37 130 employees (16.6%).

Figure 2.1: Distribution of Employees by Branch



2.4 The total number of employees is the only available information of taxi and public light bus drivers in this survey. Unless otherwise stated, the manpower information/analysis presented below does not include these 50 600 taxi and public light bus drivers.

2.5 With taxi and public light bus drivers excluded, “Freight Transport – Land” was the sector that employed most people (i.e. 64 591 employees). “Passenger Transport - Land” (37 130 employees) and “Passenger Transport – Air” (25 821 employees) came second and third respectively.

⁸ According to C&SD, a labour force of around 3 978 000 was recorded during the period from Sep to Nov 2018.

2.6 The majority of employees (72.7%) were at “Clerical/Craftsman/Operative” level, followed by 17.2% at “Executive/Supervisory” level and 10.1% at “Managerial” level. For details of the distribution across sectors, please refer to Table 2.2.

Table 2.2: Number of Employees by Sector and by Job Level

| Sector | Job Level | | | Overall |
|-------------------------------------|-----------------------|---------------------------|----------------------------------|-----------------------|
| | Managerial | Executive/ Supervisory | Clerical/Craftsman/ Operative | |
| <i>Freight Transport</i> | | | | |
| Land | 2 598 | 5 932 | 56 061 | 64 591 |
| Sea | 3 790 | 3 432 | 12 308 | 19 530 |
| Air | 3 460 | 5 184 | 16 942 | 25 586 |
| Sub-total | 9 848 | 14 548 | 85 311 | 109 707 |
| <i>Passenger Transport *</i> | | | | |
| Land | 1 611 | 7 484 | 28 035 | 37 130 |
| Sea | 167 | 194 | 567 | 928 |
| Air | 5 959 | 7 608 | 12 254 | 25 821 |
| Sub-total | 7 737 | 15 286 | 40 856 | 63 879 |
| Total | 17 585 (10.1%) | 29 834 (17.2%) | 126 167 (72.7%) | 173 586 (100%) |

(* Excluding 50 600 Taxi and Public Light Bus Drivers)

Number of Vacancies

2.7 Employers reported a total of 6 875 vacancies at the time of survey, representing a vacancy rate of 3.8%. Passenger Transport was noted to have a higher vacancy rate (4.6%) over Freight Transport (3.3%). Distribution of vacancies by sector is given in Table 2.3 below:

Table 2.3: Distribution of Vacancies by Sector

| Sector | Freight Transport | | Passenger Transport * | |
|--------------------|-------------------|---------------------------------|-----------------------|---------------------------------|
| | No. of Employees | No. of Vacancies (Vacancy Rate) | No. of Employees | No. of Vacancies (Vacancy Rate) |
| Land | 64 591 | 2 837 (4.2%) | 37 130 | 1 914 (4.9%) |
| Sea | 19 530 | 192 (1.0%) | 928 | 24 (2.5%) |
| Air | 25 586 | 773 (2.9%) | 25 821 | 1 135 (4.2%) |
| All Sectors | 109 707 | 3 802 (3.3%) | 63 879 | 3 073 (4.6%) |

(* Excluding Taxi and Public Light Bus Drivers)

Age Distribution of Employees at Clerical/Craftsman/Operative Level

2.8 As revealed in the survey, ageing problem of Passenger Transport was more acute than that of Freight Transport. 49.4% of the employees of Passenger Transport were aged 51 or above while only 22.1% of the employees of Freight Transport were at that age range. Among the six sectors, “Passenger Transport – Land” seemed to encounter a tough succession problem with 18.3% employees reaching the age of 61 or above.

Table 2.4: Age Distribution of Employees at Clerical/Craftsman/Operative Level

| Sector | | Age 40 or Below (%) | Age 41-50 (%) | Age 51-55 (%) | Age 56-60 (%) | Age 61 or Above (%) |
|--------------------------------------|-------------|---------------------|---------------|---------------|---------------|---------------------|
| <i>Freight Transport</i> | <i>Land</i> | 30.4% | 44.0% | 14.0% | 9.3% | 2.2% |
| | <i>Sea</i> | 47.0% | 28.6% | 8.1% | 4.3% | 12.0% |
| | <i>Air</i> | 48.9% | 41.2% | 5.0% | 3.8% | 1.1% |
| Freight Transport Sub-total | | 36.8% | 41.1% | 11.2% | 7.4% | 3.5% |
| <i>Passenger Transport*</i> | <i>Land</i> | 17.6% | 21.3% | 18.3% | 24.5% | 18.3% |
| | <i>Sea</i> | 45.7% | 16.2% | 12.7% | 16.4% | 9.0% |
| | <i>Air</i> | 61.5% | 22.6% | 8.7% | 4.8% | 2.3% |
| Passenger Transport Sub-total | | 29.0% | 21.6% | 15.8% | 19.4% | 14.2% |
| All Sectors | | 34.3% | 34.7% | 12.7% | 11.3% | 7.0% |

(* Excluding 50 600 Taxi and Public Light Bus Drivers)

B. Freight Transport

Number of Employees

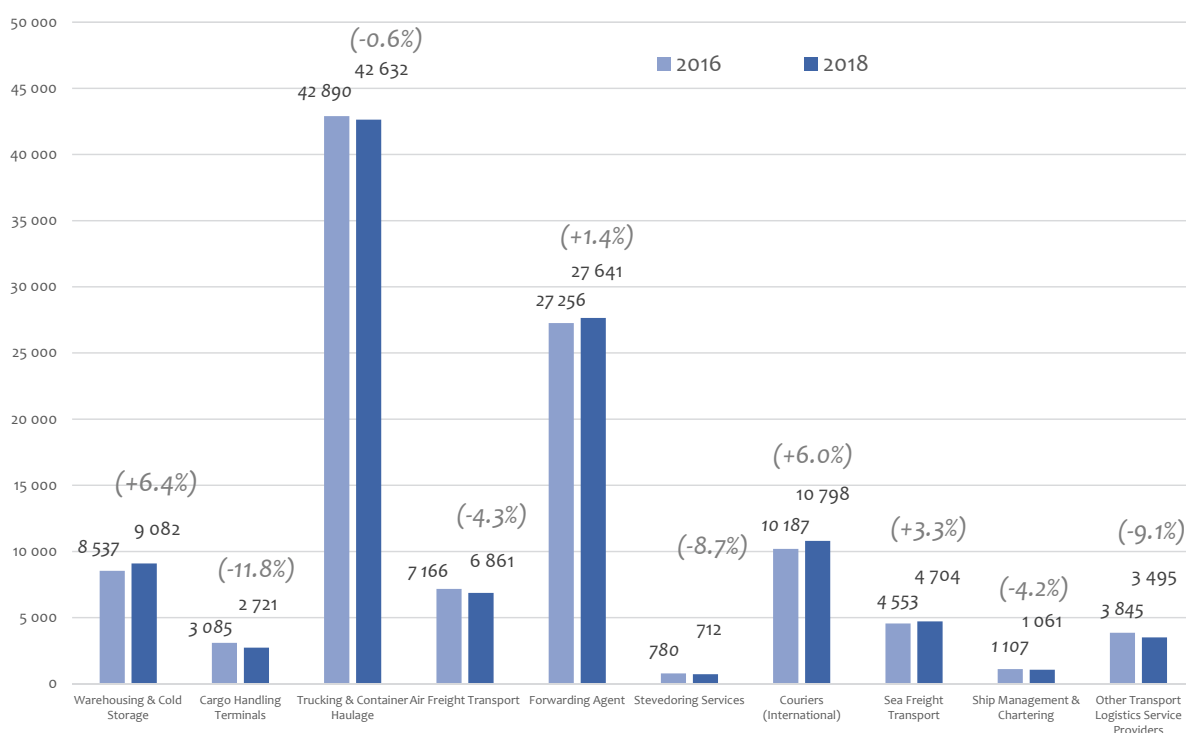
2.9 In September 2018, 109,707 employees were working in Freight Transport whereas the figure in 2016 was 109,406, showing a slight increase at 0.3%.

2.10 Among the ten branches of Freight Transport, “Trucking and Container Haulage” had the largest employment size (i.e. 42 632 employees). “Forwarding Agent” and “Couriers (International)” came second and third with 27 641 and 10 798 employees respectively.

2.11 “Warehousing & Cold Storage” and “Couriers (International)” showed the highest growth rate in the number of employees over 2016 (i.e. 6.4% and 6.0% respectively). Decline in the number of employees was observed for “Cargo Handling Terminals” (-11.8%), “Other Transport Logistics Service Providers” (-9.1%), “Stevedoring Services” (-8.7%), “Airfreight Transport” (-4.3%), “Ship Management & Chartering” (-4.2%) and “Trucking & Container Haulage” (-0.6%).

2.12 Due to keen competition from other ports as well as the weakening of Hong Kong’s position as Mainland’s entrepot due to liberalisation of the latter’s trade and shipping policies, Hong Kong’s container throughput has been declining in recent years, leading to the decrease in manpower engaging in “Cargo Handling Terminals” and “Stevedoring Services”. “Other Transport Logistics Service Providers” comprised retail, trading and manufacturing companies. Comparing with 2016, more companies reported that they had no transport and logistics manpower at all. It is likely that the decrease in manpower of this branch was resulted from out-sourcing services and may not represent shrinking demand on logistics services. For “Air Freight Transport”, since some air transport operators offer both freight and passenger transport services, the employers might report some headcounts under Passenger Transport, leading to the decrease in the number of employees reported in Freight Transport. It may not reflect a diminishing manpower demand.

Figure 2.2: Change in Number of Employees (Freight Transport) by Branch



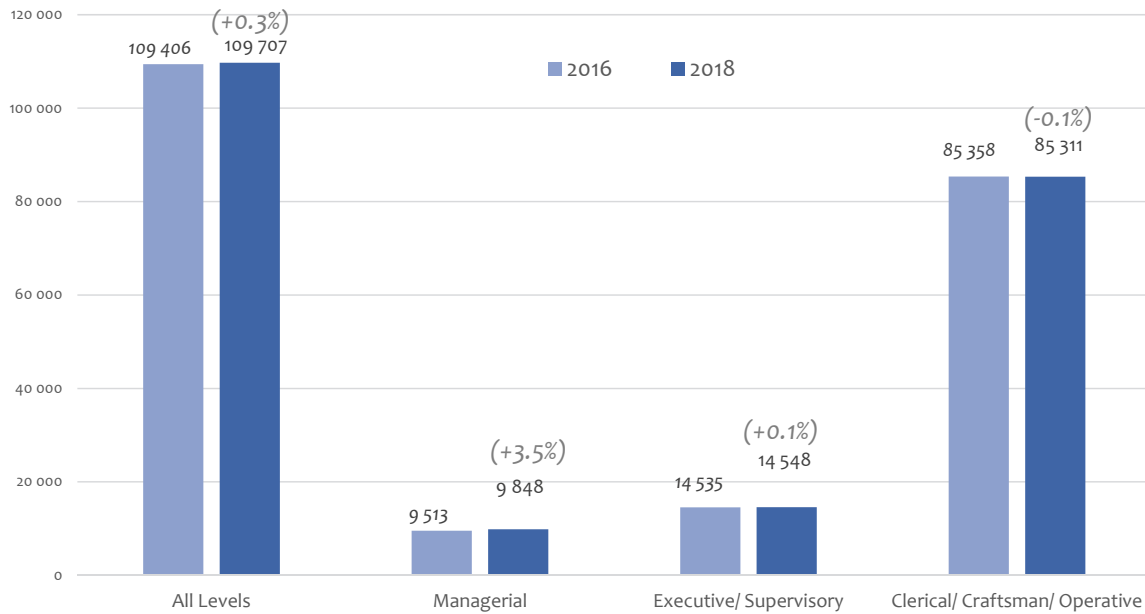
2.13 In terms of job level, 77.8% of employees were “Clerical/Craftsman/Operative” staff, 13.3% were “Executive/Supervisory” staff and the remaining 9.0% were staff at “Managerial” level. The distribution of employees across job levels was similar to that of the previous survey in 2016. Number of employees by branch and by job level is shown in Table 2.5.

Table 2.5: Number of Employees (Freight Transport) by Branch and by Job Level

| Branch | Managerial Level | Executive/Supervisory Level | Clerical/Craftsman/Operative Level | All Levels |
|---|-------------------------|------------------------------------|---|-----------------------|
| Warehousing & Cold Storage | 685 | 1 311 | 7 086 | 9 082 |
| Cargo Handling Terminals | 255 | 411 | 2 055 | 2 721 |
| Trucking & Container Haulage | 1 330 | 3 581 | 37 721 | 42 632 |
| Air Freight Transport | 652 | 1 691 | 4 518 | 6 861 |
| Forwarding Agent | 4 755 | 4 829 | 18 057 | 27 641 |
| Stevedoring Services | 102 | 110 | 500 | 712 |
| Couriers (International) | 544 | 1 154 | 9 100 | 10 798 |
| Sea Freight Transport | 1 160 | 1 120 | 2 424 | 4 704 |
| Ship Management & Chartering | 290 | 190 | 581 | 1 061 |
| Other Transport Logistics Service Providers | 75 | 151 | 3 269 | 3 495 |
| All Branches | 9 848 (9.0%) | 14 548 (13.3%) | 85 311 (77.8%) | 109 707 (100%) |

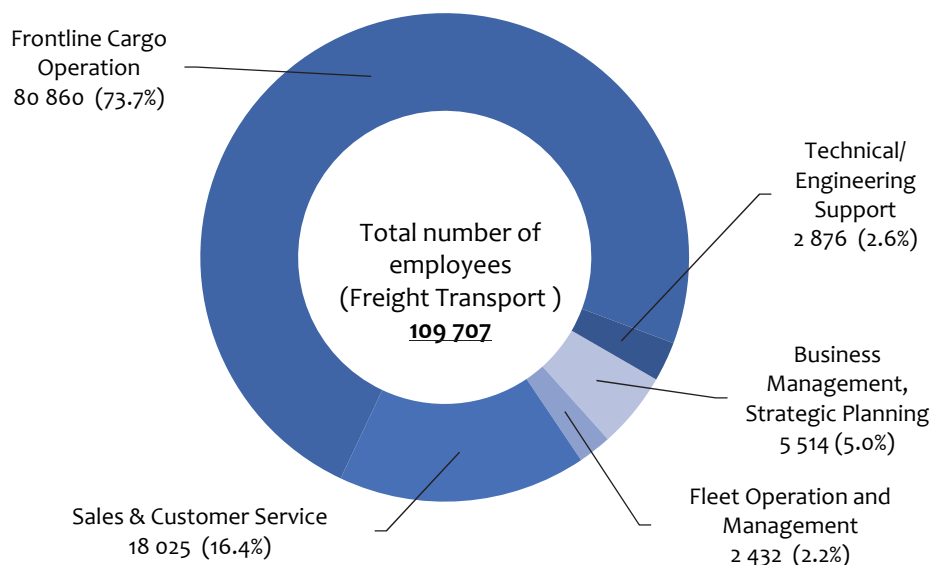
2.14 It was also noted that the number of employees at “Managerial” level increased by 3.5% while the number of employees at other two job levels remained stable over the past two years. Change in the number of employees by job level from 2016 to 2018 is given in Figure 2.3.

Figure 2.3: Change in Number of Employees (Freight Transport) by Job Level



2.15 Distribution of employees across scopes of responsibilities is given in Figure 2.4. “Frontline Cargo Operation” accounted for the biggest portion (73.7%) of the Freight Transport workforce, followed by “Sales and Customer Service” (16.4%), “Business Management, Strategic Planning” (5.0%) and “Technical/Engineering Support” (2.6%). “Fleet Operation and Management” had the least employees (2.2%) among the five scopes of responsibilities. Although the pattern was the same as the 2016 survey, the proportion of employees engaged in “Business Management, Strategic Planning” increased from 3.7% in 2016 to 5.0% in 2018.

Figure 2.4: Distribution of Employees (Freight Transport) by Scope of Responsibilities



Number of Vacancies

2.16 A total of 3 802 job vacancies were reported in this survey, representing a vacancy rate of 3.3%. Comparing with the 2016 survey, there was an increase in the number of vacancies by 961. The marked increase in the number of vacancies amid the slight increase in the number of employees (i.e. 301 employees) over the past two years, to a certain extent, reflected the difficulties for the industry to fill up the vacant posts. “Trucking & Container Haulage”, “Warehousing & Cold Storage”, “Air Freight Transport” and “Couriers (International)” were the top four branches with the largest number of vacancies. “Trucking & Container Haulage” with 1 893 vacancies accounted for nearly half of the total vacancies of Freight Transport. In terms of job level, most vacancies were from “Clerical/Craftsman/Operative” level.

Table 2.6: Number of Vacancies (Freight Transport) by Branch and by Job Level

| Branch | Managerial Level | Executive/ Supervisory Level | Clerical/ Craftsman/ Operative Level | All Levels |
|---|----------------------------|-------------------------------------|---|-------------------------------|
| Warehousing & Cold Storage | 2 (0.3%) | 89 (6.4%) | 435 (5.8%) | 526 (5.5%) |
| Cargo Handling Terminals | 0 (0%) | 1 (0.2%) | 22 (1.1%) | 23 (0.8%) |
| Trucking & Container Haulage | 31 (2.3%) | 30 (0.8%) | 1 832 (4.6%) | 1 893 (4.3%) |
| Air Freight Transport | 3 (0.5%) | 63 (3.6%) | 360 (7.4%) | 426 (5.8%) |
| Forwarding Agent | 26 (0.5%) | 32 (0.7%) | 205 (1.1%) | 263 (0.9%) |
| Stevedoring Services | 0 (0%) | 0 (0%) | 3 (0.6%) | 3 (0.4%) |
| Couriers (International) | 4 (0.7%) | 20 (1.7%) | 377 (4.0%) | 401 (3.6%) |
| Sea Freight Transport | 1 (0.1%) | 6 (0.5%) | 49 (2.0%) | 56 (1.2%) |
| Ship Management & Chartering | 8 (2.7%) | 10 (5.0%) | 16 (2.7%) | 34 (3.1%) |
| Other Transport Logistics Service Providers | 3 (3.8%) | 0 (0%) | 174 (5.1%) | 177 (4.8%) |
| All Branches | 78 (0.8%) | 251 (1.7%) | 3 473 (3.9%) | 3 802 (3.3%) |

(Figures in brackets denote the vacancy rates)

Employers' Manpower Forecast

2.17 Employers were asked to forecast the manpower of their establishments in September 2019 and September 2020. Slight annual growth rates of 0.75% and 0.23% were forecasted for 2019 and 2020 respectively. Employers' forecast (EF) of manpower by job level is shown in Table 2.7.

Table 2.7: Employers' Manpower Forecast (Freight Transport) by Job Level

| Job Level | Manpower 2018 [^] | Manpower Forecast (growth rate) | |
|------------------------------|----------------------------|---------------------------------|------------------------|
| | | 2019 | 2020 |
| Managerial | 9 926 | 10 006 (0.81%) | 10 033 (0.27%) |
| Executive/Supervisory | 14 799 | 14 904 (0.71%) | 14 986 (0.55%) |
| Clerical/Craftsman/Operative | 88 784 | 89 447 (0.75%) | 89 604 (0.18%) |
| Total | 113 509 | 114 357 (0.75%) | 114 623 (0.23%) |

([^] Manpower refers to the total number of employees and the number of vacancies)

2.18 The distribution of forecasted manpower by branch is shown in Table 2.8. No significant manpower change was found in any branch. From the employers' perspective, "Warehousing & Cold Storage" was expected to have a relatively noticeable manpower growth among all branches.

Table 2.8: Employers' Manpower Forecast (Freight Transport) by Branch

| Branch | Manpower 2018 | Manpower Forecast (growth rate) | |
|---|----------------|---------------------------------|------------------------|
| | | 2019 | 2020 |
| Warehousing & Cold Storage | 9 608 | 9 668 (0.62%) | 9 799 (1.35%) |
| Cargo Handling Terminals | 2 744 | 2 793 (1.79%) | 2 767 (-0.93%) |
| Trucking & Container Haulage | 44 525 | 45 021 (1.11%) | 45 111 (0.20%) |
| Air Freight Transport | 7 287 | 7 348 (0.84%) | 7 351 (0.04%) |
| Forwarding Agent | 27 904 | 28 042 (0.49%) | 28 101 (0.21%) |
| Stevedoring Services | 715 | 712 (-0.42%) | 712 (0%) |
| Couriers (International) | 11 199 | 11 205 (0.05%) | 11 208 (0.03%) |
| Sea Freight Transport | 4 760 | 4 803 (0.90%) | 4 805 (0.04%) |
| Ship Management & Chartering | 1 095 | 1 093 (-0.18%) | 1 097 (0.37%) |
| Other Transport Logistics Service Providers | 3 672 | 3 672 (0%) | 3 672 (0%) |
| Total | 113 509 | 114 357 (0.75%) | 114 623 (0.23%) |

Employers' Preferred Education Level of Employees

2.19 For “Managerial” staff, while most employers (64.7%) preferred them to have a First Degree, nearly one-fourth employers (24.6%) accepted them to have a lower level of education (i.e. Secondary 7 or below). For “Executive/Supervisory” staff, the respondents had diverse views on the preferred education level. Over 50% of them preferred “Executive/Supervisory” staff to have post-secondary qualifications (i.e. from Diploma/Certificate to First Degree) but 43.7% of them considered that Secondary 4 to 7 was fine for this job level. For staff at “Clerical/Craftsman/Operative” level, over 90% employers only expected them to have Secondary 7 or below qualifications.

Table 2.9: Preferred Education Level of Employees (Freight Transport) by Job Level

| Level of Education | Managerial Level | Executive/ Supervisory Level | Clerical/ Craftsman/ Operative Level |
|-------------------------------------|-------------------------|---|---|
| Postgraduate Degree | 0.8% | 0.3% | 0.0% |
| First Degree | 64.7% | 16.0% | 1.0% |
| Sub-degree (e.g. Higher Diploma) | 6.7% | 27.4% | 3.3% |
| Diploma/Certificate | 3.2% | 11.1% | 4.5% |
| Secondary 4 to 7 | 18.4% | 43.7% | 49.8% |
| Secondary 3 or below | 6.2% | 1.5% | 41.4% |
| Total | 100% | 100% | 100% |

Preferred Competency of Employees

2.20 Respondents were asked to indicate those functional areas that their employees would require training in the next 12 months. The top three functional areas mentioned by respondents for employees at different job levels are shown in Tables 2.10A – 2.10C. Among the 10 functional areas, “Cargo Safety and Security”, “Sales, Marketing and Customer Services” and “Operation Management” were widely mentioned by employers across sectors.

Table 2.10A: Preferred Competencies of Employees (Air Freight & Express) by Job Level

| Functional Area | Air Freight & Express | | |
|--|-----------------------|------------------------------|--------------------------------------|
| | Managerial Level | Executive/ Supervisory Level | Clerical/ Craftsman/ Operative Level |
| Operation Management | | | Δ |
| Planning and Design of Logistics Solutions | | | |
| Sales, Marketing and Customer Services | Δ | Δ | |
| Cargo Transport and Handling | Δ | | Δ |
| Cargo Safety and Security | Δ | Δ | Δ |
| E-Logistics | | | |
| Quality Management | | | |
| Import / Export Documentation and Procedures | | Δ | |
| Insurance and Legal Matters | | | |
| Occupational Safety & Health | | | |

Table 2.10B: Preferred Competencies of Employees (Shipping) by Job Level

| Functional Area | Shipping | | |
|--|------------------|------------------------------|--------------------------------------|
| | Managerial Level | Executive/ Supervisory Level | Clerical/ Craftsman/ Operative Level |
| Operation Management | Δ | | Δ |
| Planning and Design of Logistics Solutions | | | |
| Sales, Marketing and Customer Services | Δ | Δ | Δ |
| Cargo Transport and Handling | | | Δ |
| Cargo Safety and Security | | | |
| E-Logistics | | | |
| Quality Management | | | |
| Import / Export Documentation and Procedures | Δ | Δ | |
| Insurance and Legal Matters | | | |
| Occupational Safety & Health | | Δ | |

(Δ denotes the three most widely chosen functional areas at particular job level in particular sector)

Table 2.10C: Preferred Competencies of Employees (Land Transport & Distribution/Terminals, Warehouse, and Logistics Centre/Supporting and Ancillary Services) by Job Level

| Functional Area | Land Transport & Distribution/ Terminals, Warehouse, and Logistics Centre/ Supporting and Ancillary Services | | |
|--|--|---------------------------------|--|
| | Managerial Level | Executive/ Supervisory Level | Clerical/ Craftsman/ Operative Level |
| Operation Management | Δ | Δ | |
| Planning and Design of Logistics Solutions | | | |
| Sales, Marketing and Customer Services | | | |
| Cargo Transport and Handling | | | Δ |
| Cargo Safety and Security | | Δ | Δ |
| E-Logistics | | | Δ |
| Quality Management | | | |
| Import / Export Documentation | Δ | | |
| Insurance, Legal Matters & Compliance | Δ | Δ | |
| Environmental Protection | | | |

(Δ denotes the three most widely chosen functional areas at particular job level in particular sector)

C. Passenger Transport

Number of Employees

2.21 The survey revealed that 114 479 employees, including 50 600 taxi and public light bus drivers, were working in Passenger Transport in September 2018. Apart from this total number of employees, other manpower information presented below is solely based on the findings collated from sample establishments, and the corresponding manpower situation of taxi and public light bus drivers is not reflected.

2.22 Excluding taxi and public light bus drivers, there were 63 879 employees engaged in Passenger Transport, of which “Vehicle and Rail Operators” employed most people (i.e. 37 130) while “Vessel Transport Operators” had the least number of employees (i.e. 928).

2.23 Regarding job levels, most employees (64%) were Clerical/Craftsman/Operative” staff. “Executive/Supervisory” and “Managerial” staff made up 23.9% and 12.1% of the workforce respectively.

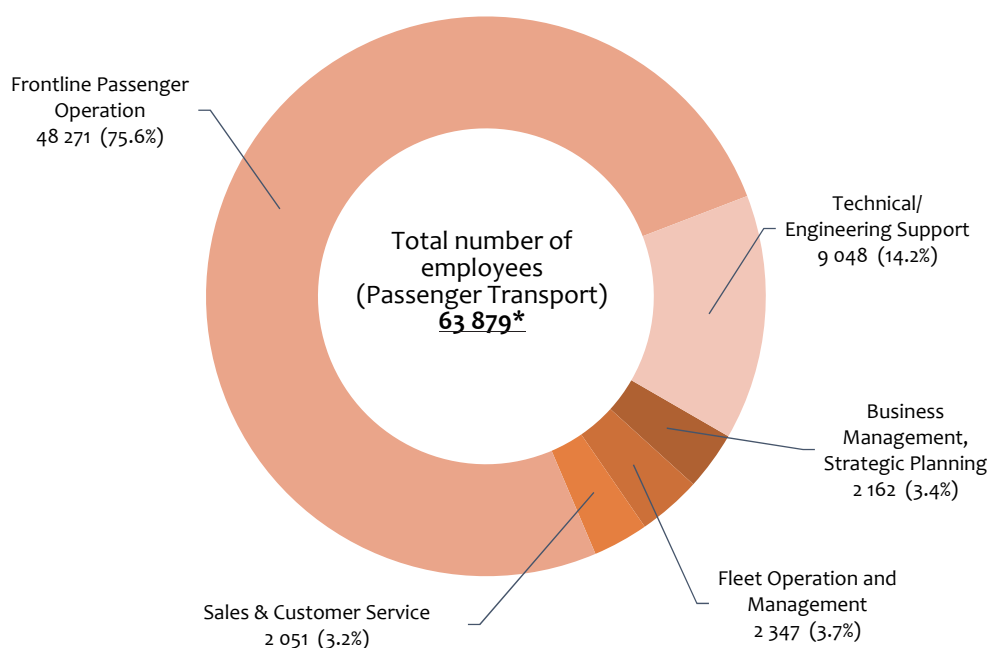
Table 2.11: Number of Employees (Passenger Transport) by Branch by Job Level

| Branch* | Managerial Level | Executive/ Supervisory Level | Clerical/ Craftsman/ Operative Level | All Levels |
|----------------------------|----------------------|------------------------------|--------------------------------------|----------------------|
| Vehicle and Rail Operators | 1 611 | 7 484 | 28 035 | 37 130 |
| Vessel Transport Operators | 167 | 194 | 567 | 928 |
| Aviation Service Operators | 5 959 | 7 608 | 12 254 | 25 821 |
| All Branches | 7 737 (12.1%) | 15 286 (23.9%) | 40 856 (64.0%) | 63 879 (100%) |

(* Excluding 50,600 taxi and public light bus drivers)

2.24 The number of employees across scopes of responsibilities is shown in Figure 2.5. “Frontline Passenger Operation” had the biggest share (i.e. 75.6%), followed by “Technical/Engineering Support” (14.2%), “Fleet Operation and Management” (3.7%) and “Business Management, Strategic Planning” (3.4%). “Sales & Customer Service” had the smallest portion of employees (3.2%). Comparing with Freight Transport, Passenger Transport required more “Technical/Engineering Support” staff but far less “Sales & Customer Service” staff.

Figure 2.5: Distribution of Employees (Passenger Transport) by Scope of Responsibilities



(* Excluding 50,600 taxi and public light bus drivers)

Number of Vacancies

2.25 At the time of the survey, a total of 3 073 vacancies, representing an overall vacancy rate of 4.6% was reported for Passenger Transport, of which “Vehicle and Rail Operators” was the branch with both the highest vacancy rate (4.9%) and the actual number of vacancies (1 914 vacancies). In terms of job level, “Executive/Supervisory” and “Clerical/Craftsman/Operative” levels had a higher vacancy rate (both 4.7%) over “Managerial” level (3.8%).

Table 2.12: Number of Vacancies (Passenger Transport) by Branch and by Job Level

| Branch* | Managerial Level | Executive/Supervisory Level | Clerical/Craftsman/Operative Level | All Levels |
|----------------------------|-----------------------------|------------------------------------|---|-------------------------------|
| Vehicle and Rail Operators | 85 (5.0%) | 389 (4.9%) | 1 440 (4.9%) | 1 914 (4.9%) |
| Vessel Transport Operators | 1 (0.6%) | 10 (4.9%) | 13 (2.2%) | 24 (2.5%) |
| Aviation Service Operators | 217 (3.5%) | 356 (4.5%) | 562 (4.4%) | 1 135 (4.2%) |
| All Branches | 303 (3.8%) | 755 (4.7%) | 2 015 (4.7%) | 3 073 (4.6%) |

(* Excluding taxi and public light bus drivers)

2.26 Statistics related to “Vessel Transport Operators” should be interpreted with caution. As seafarers were excluded from the study, the vacancies for “Vessel Transport Operators”, in particular those at Clerical/Craftsman/Operative level, might have been underestimated.

Employers’ Manpower Forecast

2.27 Similar to Freight Transport, employers only expected very slight increase in manpower in 2019 and 2020, i.e. an annual growth rate of 0.55% and 0.23% respectively. Employers’ forecast of manpower by job level and by branch is shown in Tables 2.13 and 2.14.

Table 2.13: Employers' Manpower Forecast (Passenger Transport) by Job Level

| Job Level* | Manpower 2018 [^] | Manpower Forecast (growth rate) | |
|------------------------------|----------------------------|---------------------------------|-----------------------|
| | | 2019 | 2020 |
| Managerial | 8 040 | 8 042 (0.02%) | 8 041 (-0.01%) |
| Executive/Supervisory | 16 041 | 16 068 (0.17%) | 16 102 (0.21%) |
| Clerical/Craftsman/Operative | 42 871 | 43 209 (0.79%) | 43 328 (0.28%) |
| Total | 66 952 | 67 319 (0.55%) | 67 471 (0.23%) |

Table 2.14: Employers' Manpower Forecast (Passenger Transport) by Branch

| Branch* | Manpower 2018 [^] | Manpower Forecast (growth rate) | |
|----------------------------|----------------------------|---------------------------------|-----------------------|
| | | 2019 | 2020 |
| Vehicle and Rail Operators | 39 044 | 39 321 (0.71%) | 39 471 (0.38%) |
| Vessel Transport Operators | 952 | 956 (0.42%) | 962 (0.63%) |
| Aviation Service Operators | 26 956 | 27 042 (0.32%) | 27 038 (-0.01%) |
| Total | 66 952 | 67 319 (0.55%) | 67 471 (0.23%) |

([^] Manpower refers to the total number of employees and the number of vacancies)

(* Excluding 50,600 taxi and public light bus drivers)

Employers' Preferred Education Level of Employees

2.28 For both “Managerial” and “Executive/Supervisory” staff, most employers preferred them to have a First Degree. For staff at “Clerical/Craftsman/Operative” level, while over 70% of employers only required them to have Secondary 7 or below qualifications, nearly 20% of employers preferred them to have a Sub-degree.

2.29 Comparing with Freight Transport, employers of Passenger Transport in general preferred their employees to have a higher level of education. Preferred education level of employees by job level is given in Table 2.15.

Table 2.15: Preferred Education Level of Employees (Passenger Transport) by Job Level

| Level of Education | Managerial Level | Executive/ Supervisory Level | Clerical/ Craftsman/ Operative Level |
|-------------------------------------|------------------|---------------------------------|--|
| Postgraduate Degree | 0.0% | 0.0% | 0.0% |
| First Degree | 96.2% | 80.6% | 1.8% |
| Sub-degree (e.g. Higher Diploma) | 1.0% | 10.7% | 19.3% |
| Diploma/Certificate | 0.5% | 1.7% | 3.9% |
| Secondary 4 to 7 | 1.8% | 6.6% | 21.9% |
| Secondary 3 or below | 0.4% | 0.4% | 53.2% |
| Total | 100.0% | 100.0% | 100.0% |

Preferred Competency of Employees

2.30 Respondents were asked to indicate those skills that their employees would require training in the next 12 months. The top three skills mentioned by respondents for employees at different job levels are shown in Table 2.16. Employers considered that training on “Customer Relationship/Complaints Handling”, “Managerial/Supervisory/Coaching Skills/Strategic Management”, “Sales and Marketing” and “Handling of Emergency Incidents” were most required by their employees across different job levels.

Table 2.16: Preferred Competencies of Employees (Passenger Transport) by Job Level

| Area | Job Level | | |
|---|------------------|---------------------------------|--|
| | Managerial Level | Executive/ Supervisory Level | Clerical/ Craftsman/ Operative Level |
| Managerial/Supervisory/Coaching Skills/ Strategic Management | Δ | Δ | |
| Customer Relationship/Complaints Handling | Δ | Δ | Δ |
| Sales and Marketing | Δ | | Δ |
| Merchandising and Purchasing | | | |
| Financing and Accounting | | | |
| Operating Special Vehicles/Equipment | | | |
| Law & Regulatory of Transport | | | |
| Crowd Control | | | |
| First Aid | | | |
| Handling of Emergency Incidents | | Δ | Δ |
| Repair and Maintenance | | | |

(Δ denotes the three most widely chosen skills at particular job level)

D. Staff Turnover

Turnover

2.31 A total of 22 913 employees of the Transport and Logistics Industry, including both Freight and Passenger Transport, left their organisations within 12 months before the survey, representing a turnover rate of 13.2% out of a total of 173 586 employees (not including 50 600 taxi and public light bus drivers whose corresponding manpower information was not available).

2.32 A summary on the whereabouts of the employees who left the establishments is given in Table 2.17.

Table 2.17: Whereabouts of Employees who Left the Establishments by Job Level

| Whereabouts | Job Level | | | Overall |
|--|--------------------|-----------------------------------|---|----------------------|
| | Managerial | Executive/ Supervisory | Clerical/ Craftsman/ Operative | |
| Taking up/starting own business on freight/passenger transport related job | 144 (0.63%) | 211 (0.92%) | 3 637 (15.87%) | 3 992 (17.42%) |
| Not taking up freight/passenger transport related jobs (e.g. Taking up/starting own business in non-transport logistics related jobs, emigration, retirement or further studies) | 41 (0.18%) | 131 (0.57%) | 1 323 (5.77%) | 1 495 (6.52%) |
| Unknown | 616 (2.69%) | 1 257 (5.49%) | 15 553 (67.88%) | 17 426 (76.05%) |
| Total | 801 (3.50%) | 1 599 (6.98%) | 20 513 (89.53%) | 22 913 (100%) |

(Figures in brackets denote the percentage share of the overall total)

Wastage

2.33 Wastage refers to the percentage of employees leaving the industry permanently, including those who took up non-transport and logistics related jobs, retired, emigrated or for other reasons left the industry. For analysis purpose, the number of employees leaving with “unknown” destination was distributed proportionally to the other two destinations as shown in Table 2.18. After the adjustment, it was estimated that 6 262 employees had left the industry permanently.

Table 2.18: Number of Employees Leaving the Industry by Job Level

| Whereabouts | Job Level | | | Overall |
|---|--------------------|---------------------------|--------------------------------------|----------------------|
| | Managerial | Executive/ Supervisory | Clerical/ Craftsman/ Operative | |
| Taking up/starting own business on freight/passenger transport related job | 623 (2.72%) | 987 (4.31%) | 15 041 (65.65%) | 16 652 (72.67%) |
| Not taking up freight/passenger transport related jobs (e.g. Taking up/starting own business in non-transport logistics related jobs, emigration, retirement or further studies) | 178 (0.77%) | 612 (2.67%) | 5 472 (23.88%) | 6 262 (27.33%) |
| Total | 801 (3.50%) | 1 599 (6.98%) | 20 513 (89.53%) | 22 913 (100%) |

(Figures in brackets denote the percentage share of the overall total)

Wastage Rate

2.34 The overall wastage rate of the industry was 3.61% and the wastage rate of the three job levels ranged from 1.01% to 4.34%.

Table 2.19: Wastage Rate Across Job Levels

| | Job Level | | | Overall |
|--|--------------|---------------------------|--------------------------------------|--------------|
| | Managerial | Executive/ Supervisory | Clerical/ Craftsman/ Operative | |
| Total number of employees | 17 585 | 29 834 | 126 167 | 173 586 |
| Number of employees leaving the industry permanently | 178 | 612 | 5 472 | 6 262 |
| Wastage rate | 1.01% | 2.05% | 4.34% | 3.61% |

New Recruits

2.35 During the 12 months before the survey, 20 226 employees of the Transport and Logistics Industry were newly recruited. Over 60% of them were recruited from other transport and logistics establishments. Fresh graduates of transport and logistics programmes only made up 1.4% of the new recruits.

Table 2.20: Source/Origin of New Recruits by Job Level

| Source/Origin | Job Level | | | Overall |
|---|--------------------|---------------------------|--------------------------------------|----------------------|
| | Managerial | Executive/ Supervisory | Clerical/ Craftsman/ Operative | |
| From other transport and logistics establishments | 359 (1.77%) | 508 (2.51%) | 11 644 (57.57%) | 12 511 (61.86%) |
| From non-transport and logistics establishments | 52 (0.26%) | 134 (0.66%) | 3 831 (18.94%) | 4 017 (19.86%) |
| New graduates studied transport and logistics programmes at education/training institutions | 2 (0.01%) | 14 (0.07%) | 268 (1.33%) | 284 (1.40%) |
| Others | 137 (0.68%) | 259 (1.28%) | 3 018 (14.92%) | 3 414 (16.88%) |
| Total | 550 (2.72%) | 915 (4.52%) | 18 761 (92.76%) | 20 226 (100%) |

(Figures in brackets denote the percentage share of the overall total)

III. CONCLUSIONS AND RECOMMENDATIONS

A. Trend of Manpower Changes

3.1 The Training Board has carefully examined the survey findings and considers that they generally reflect the manpower situation of the transport and logistics industry at the time of survey.

3.2 The Transport and Logistics Industry recorded a manpower of 231 061 headcounts (including 224 186 employees and 6 875 vacancies to be filled) in September 2018. Of these, Freight Transport had a manpower of 113 509 people (including 109 707 employees and 3 802 vacancies), and the remaining manpower of 117 552 (comprising 114 479 employees and 3 073 vacancies) were from Passenger Transport. Since it was the first time to cover Passenger Transport in the survey and no previous data are available for comparison, the manpower changes highlighted below are confined to Freight Transport.

3.3 Manpower changes across branches from 2008 to 2018 are shown in Table 3.1. While noticeable growing trend was observed from “Warehousing & Cold Storage” over the years, moderate downward trend was noticed from “Cargo Handling Terminals”, “Stevedoring Services” and “Ship Management & Chartering” since 2014.

Table 3.1: Manpower Changes (Freight Transport) by Branch from 2008 to 2018

| Branch | 2008 | 2010 | 2012 | 2014 | 2016 | 2018 |
|---|----------------|----------------|----------------|----------------|----------------|----------------|
| Warehousing & Cold Storage | 6 535 | 6 559 | 6 835 | 7 850 | 8 813 | 9 608 |
| Cargo Handling Terminals | 5 403 | 2 852 | 3 058 | 3 164 | 3 149 | 2 744 |
| Trucking & Container Haulage | 43 517 | 43 628 | 43 873 | 44 655 | 44 230 | 44 525 |
| Air Freight Transport | 4 230 | 7 309 | 8 231 | 6 914 | 7 474 | 7 287 |
| Forwarding Agent | 30 102 | 28 397 | 30 763 | 28 229 | 27 793 | 27 904 |
| Stevedoring Services | 1 846 | 1 230 | 944 | 810 | 780 | 715 |
| Couriers (International) | 3 662 | 8 893 | 10 322 | 10 613 | 10 324 | 11 199 |
| Sea Freight Transport | 4 090 | 2 288 | 2 930 | 4 218 | 4 589 | 4 760 |
| Ship Management & Chartering | N.A. | 1 719 | 1 171 | 1 163 | 1 116 | 1 095 |
| Other Transport Logistics Service Providers | 1 284 | 1 430 | 1 396 | 3 660 | 3 979 | 3 672 |
| Total | 100 669 | 104 305 | 109 523 | 111 276 | 112 247 | 113 509 |

Note: “Ship Management & Chartering” was grouped under “Sea Freight Transport” in 2008; numbers of employees were used in 2010.

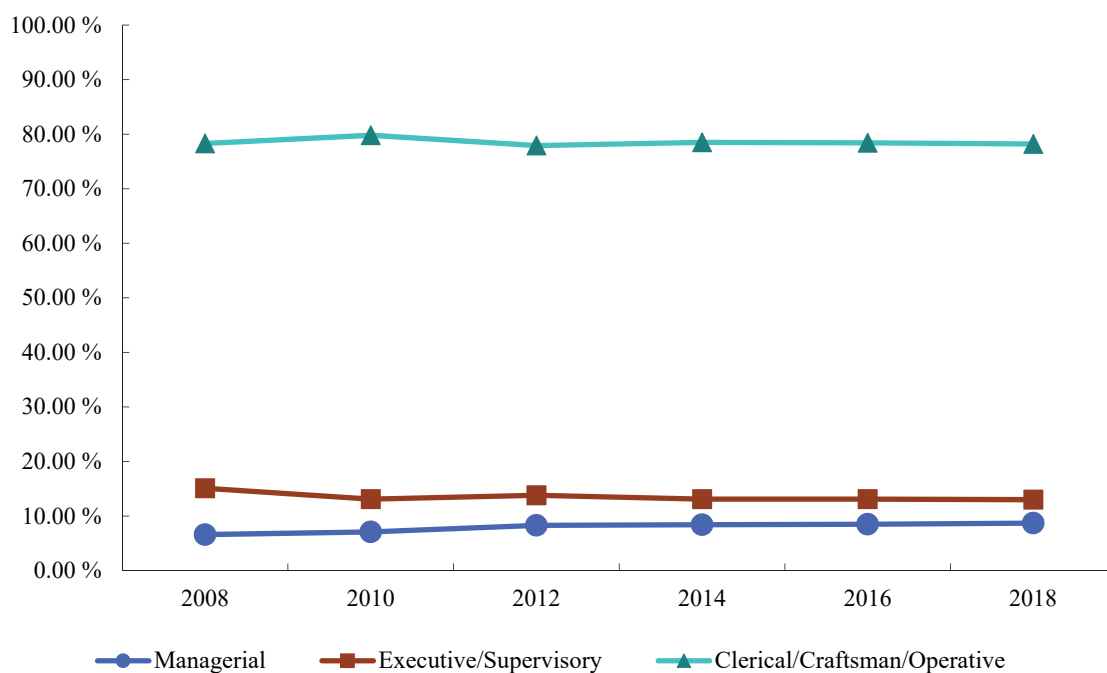
3.4 Changes of manpower by job level are given in Table 3.2 and Figure 3.1. A growing proportion of “Managerial” staff was noted over the past 10 years. Since uncertain global economy, keen regional competitions and growing client demands have posed great challenges to the Transport and Logistics Industry, companies might require more managerial staff for strategic planning to help them stay competitive in the complex operating environment.

Table 3.2: Manpower Changes (Freight Transport) by Job Level from 2008 to 2018

| Job Level | 2008 | 2010 | 2012 | 2014 | 2016 | 2018 |
|------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Managerial | 6 614 (6.6%) | 7 435 (7.1%) | 9 038 (8.3%) | 9 312 (8.4%) | 9 546 (8.5%) | 9 926 (8.7%) |
| Executive/Supervisory | 15 204 (15.1%) | 13 677 (13.1%) | 15 127 (13.8%) | 14 564 (13.1%) | 14 680 (13.1%) | 14 799 (13.0%) |
| Clerical/Craftsman/Operative | 78 851 (78.3%) | 83 193 (79.8%) | 85 358 (77.9%) | 87 400 (78.5%) | 88 021 (78.4%) | 88 784 (78.2%) |
| Total | 100 669 | 104 305 | 109 523 | 111 276 | 112 247 | 113 509 |

(Figures in brackets denote the percentage share of the total manpower by a particular job level in respective year)

Figure 3.1: Manpower Changes (Freight Transport) by Job Level



B. Business Outlook

3.5 The Training Board is cautiously optimistic for the prospects of the transport and logistics industry. If in-service practitioners could make good use of Hong Kong's competitive edges, grasp new business opportunities and keep upgrading themselves, it is expected that the industry will sustain a stable development and have mild manpower growth in the years ahead.

3.6 To stay competitive amidst the increasingly complex operating environment, in-service practitioners are advised to pay attention to the following challenges and opportunities which are considered as major factors affecting the growth of the industry.

Challenges

3.7 Freight transport is vulnerable to changes in the external economic environment since most companies serve the international market. Besides, Hong Kong is a re-export hub. Domestic exports accounted for merely 1% of the value of the total exports in 2017, the remaining 99% was contributed by re-exports⁹. Uncertain global economic development, especially trade tensions between US and China will affect Hong Kong's re-export trade and thus the demand for logistics services.

3.8 Owing to continuous liberalisation of trade and port policies of the Mainland China, Hong Kong's position as an entrepot has been weakening in recent years. Shift of manufacturing activities in the Mainland China to emerging economies in South Asia also lessens the demand for Hong Kong's logistics service. Ranking of Hong Kong Port in cargo throughput has further dropped to the seventh place in 2018¹⁰.

3.9 Keen regional competitions from the Mainland China, Singapore and other Asian countries, together with high operating costs and insufficient land, continue to worsen the operating environment of freight transport service providers and reduce their profit margins.

3.10 Stringent regulatory requirements also impose additional pressure on the industry. For example, new requirement of the International Civil Aviation Organization for 100% security screening on air cargo, to be effective in June 2021¹¹, will inevitably increase the operating costs of logistics companies.

3.11 The opening of the Hong Kong-Zhuhai-Macao Bridge has affected the business of river passenger transport, although the full impact of which remains to be seen.

⁹ Source from *Hong Kong Merchandise Trade Statistics, C&SD*

¹⁰ Source from *Marine Department*

¹¹ Source from *Civil Aviation Department*

3.12 Recruitment and retention of talent, in particular those at frontline or operative level, has been a big challenge for both freight and passenger transport in recent years. The ageing problem is especially noticeable for frontline operation staff of passenger transport, most of which are drivers. While seafarers are not included in the survey, as reflected by the sea transport sector, vessel crews also encounter a serious ageing problem.

Opportunities

3.13 Despite the challenges mentioned above, Hong Kong still has traditional advantages to sustain the development of the Transport and Logistics Industry. These strengths include excellent geographical location, talent with international vision, free economy, customs efficiency, simple taxation system, as well as a well-developed infrastructure and multi-modal connectivity. The industry may leverage on these established advantages to explore new business opportunities/markets.

3.14 There has been a continuous increase in Hong Kong's air cargo and passenger throughput in recent years. The Hong Kong International Airport (HKIA) was ranked the first and the fourth respectively for cargo and passenger throughput in 2018¹². With the introduction of a three-runway system which is targeted to be completed in 2024, HKIA will be capable of handling about 100 million passengers and about 9 million tonnes of cargo each year¹³. The construction of a premium logistics centre at Kwo Lo Wan in the South Cargo Precinct of HKIA is also in the pipeline. Scheduled to commence operation in 2023, this logistics centre will become the smart hub in Asia serving the fast-going global e-commerce business including the handling of temperature-controlled products such as pharmaceuticals. These enhanced facilities will further strengthen Hong Kong's position as a regional aviation hub.

3.15 Although the cargo throughput of the Kwai Chung Container Port has been declining in recent years, both the Government and the port operators have implemented measures to improve the port's handling capacity with a view to enhance its overall competitiveness across the region. For example, the Rambler Channel into the Container Port has been deepened to provide adequate depth of water to enable the new generation of ultra-large container ships to call at the port. More back-up land for container stacking will also be provided by the Government in phases. In January 2019, four port operators announced the formation of the Hong Kong Seaport Alliance¹⁴, a joint operating agreement designed to create additional capacity by increasing the flexibility in the overall berth and yard planning with the use of a common terminal operating system.

¹² Source from HKIA

¹³ Source from HKIA

¹⁴ Source from Hongkong International Terminals Limited

3.16 “Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area (GBA)” positioned Hong Kong as an international financial, transportation and trade centre as well as an international aviation hub. With government support at a national level, it is believed that Hong Kong and other cities in the GBA can complement each other with their strengths, and develop in a coordinated and integrated way. Enhanced connectivity with the GBA, through the Hong Kong-Zhuhai-Macao Bridge and the Hong Kong section of the Guangzhou-Shenzhen-Hong Kong Express Rail Link, also offers new business opportunities to Hong Kong since the GBA is an enormous market with a population of 70 million and a gross domestic product of US\$1.5 trillion¹⁵.

3.17 In line with the development focus stated in the Outline Development Plan, the HKSAR Government is committed in strengthening Hong Kong’s position as an international logistics hub and supporting the development of high value maritime services (e.g. maritime law, insurance, finance and arbitration). It is putting in place a package of initiatives to strengthen the maritime industry. For example, profits tax concession will be provided to boost ship marine insurance businesses. The Hong Kong Maritime and Port Board has been commissioned to work out tax or other measures to attract ship finance companies to establish their offices in Hong Kong and developing Hong Kong into a ship leasing centre in the Asia-Pacific region¹⁶. The 2018 Policy Address also announced the injection of \$200 million into the Maritime and Aviation Training Fund for talent development.

3.18 E-commerce business is still growing and is believed to have huge room for further development. To meet customers’ expectation, the need for faster small-parcel shipments will keep rising. It will boost the demand for air cargo transport, warehousing and last mile delivery services.

3.19 Unlike freight transport, demand for passenger transport service is largely local driven, making it more stable and resilient to global economic change. In December 2017, about 12.7 million passenger journeys were made on a public transport system which includes railways, trams, buses, minibuses, taxis and ferries daily¹⁷. In 2021, the overall passenger demand for public transport is expected to rise, with the number of passenger trips reaching around 13.2 million per day¹⁸.

3.20 The railway system, which carried 5.5 million passengers per day in 2017, is the largest passenger carrying mode. In view that the MTR will have new railway lines, extensions and stations during the period from 2021 to 2031, additional manpower will be required upon completion of these projects.

¹⁵ Source from the Constitutional and Mainland Affairs Bureau.

¹⁶ Source from “The 2019-20 Budget”

¹⁷ Source from “2018 Annual Transport Digest”, Transport Department

¹⁸ Source from “Public Transport Strategic Study 2017”, Transport and Housing Bureau

3.21 While railways will continue to be the backbone of Hong Kong's passenger transport system, by 2021, the shares of other modes in local public transport will roughly equal to the existing levels, with franchised buses around 30%, public light buses close to 15%, non-franchised buses nearly 2%, taxis close to 8%, trams nearly 1%, and ferries almost 1%¹⁹. This means other modes of transport services are likely to have stable manpower demand in the next few years.

3.22 In 2018, HKIA handled 74.7 million passengers, marking an annual increase of 2.5%. The growth in passenger traffic was mainly driven by the increase of Hong Kong resident travel²⁰. With the introduction of new routes by different airlines and the additional resources allocated by the Government to step up promotion of Hong Kong as a premier tourism destination, it is believed that the demand for air passenger transport will continue to grow steadily.

3.23 Owing to closer social and economic ties of the HKSAR with the Mainland and the improved cross-boundary transport infrastructure (e.g. the new boundary control point at Liantang/Heung Yuen Wai), the cross-boundary passenger traffic demand is also expected to continue to grow in the next few years.

3.24 The Government also has some measures in place/in the pipeline to improve the business environment of the Transport and Logistics Industry. For example, the number of seats of minibus has been increased to 19 in response to the request of the industry. To attract new blood to join the industry as drivers, the Government proposes to relax the current requirement for applications of driving licenses for commercial vehicles from holding a valid driving license of private car or light goods vehicle for a period of at least three years to at least one year.

¹⁹ Source from "Railway Development Strategy 2014", Transport and Housing Bureau

²⁰ Source from HKIA

C. Forecast of Future Manpower

Manpower Forecast for Freight Transport

3.25 Labour Market Analysis (LMA) approach was adopted for projecting the annual manpower requirement of the Transport and Logistics Industry by examining a group of key statistical data/economic indicators collected to reflect the important changes in local economy, demography and labour market.

3.26 A variable reduction method called the Principal Component Analysis was used to select and create variables/components from the sets of economic indicators for use in building and maintaining the statistical model. The detailed description of the LMA is given in *Appendix 12*. Manpower projection of Freight Transport using Employers' forecast (EF) and LMA approach is shown in Table 3.3.

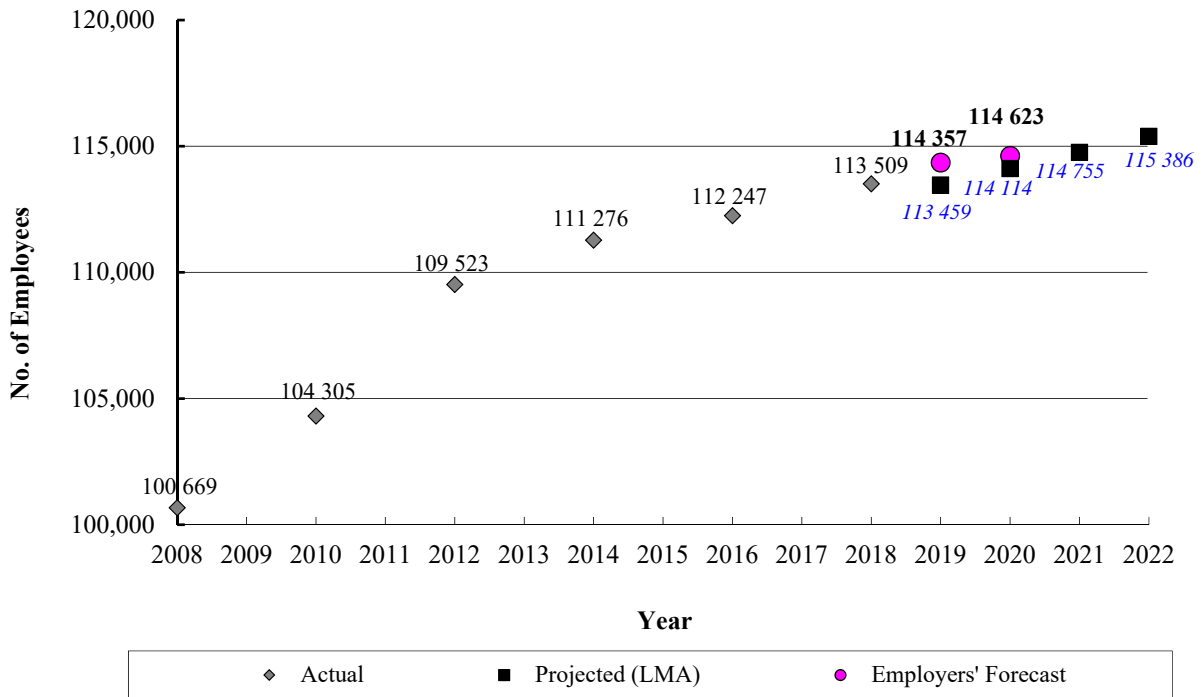
Table 3.3: Manpower Projection (Freight Transport) for 2019 – 2022

| Year | Actual Manpower | Projected Manpower (Annual growth rate) | |
|------|-----------------|---|------------------|
| | | EF | LMA |
| 2018 | 113 509 | - | - |
| 2019 | - | 114 357 (0.75%) | 113 459 (-0.04%) |
| 2020 | - | 114 623 (0.23%) | 114 114 (0.58%) |
| 2021 | - | - | 114 755 (0.56%) |
| 2022 | - | - | 115 386 (0.55%) |

Trend of Manpower Change of Freight Transport

3.27 There has been a growing trend in the manpower of Freight Transport since 2008 but the growth has become stagnant in recent years. At the time of survey, the respondents only anticipated a very slight growth rate of their manpower for the next two years. The LMA approach also indicated nominal growth of manpower from 2019 to 2022. Please find the trend of manpower growth of Freight Transport since 2008 below. As the projection by LMA is very close to Employers' forecast, LMA projection is adopted by the Training Board for estimation of annual training requirement for Freight Transport.

Figure 3.2: Manpower Trend (Freight Transport) from 2008 to 2022



Manpower Forecast for Passenger Transport

3.28 Since it was the first time to include Passenger Transport in this periodic survey, historical data was not available for application of the LMA approach for manpower projection. Thus, forecast by employers for 2019 – 2020 was adopted for Passenger Transport.

Table 3.4: Manpower Projection (Passenger Transport) for 2019 – 2020

| Year | Actual Manpower* | Projected Manpower (Annual growth rate) |
|------|------------------|---|
| | | EF |
| 2018 | 66 952 | - |
| 2019 | - | 67 319 (0.55%) |
| 2020 | - | 67 471 (0.23%) |

(* Excluding 50,600 taxi and public light bus drivers)

Annual Training Requirement

3.29 Based on the projected annual growth rate and the wastage rate, the training requirements projected by the Training Board for Freight Transport and Passenger Transport are given in Tables 3.5A & 3.5B.

Table 3.5A: Average Annual Training Requirement (Freight Transport)
for the Next 4 Years (2019 – 2022)

| Job Level | Recommended Annual Requirement | Preferred Education Level |
|----------------------------------|---------------------------------------|--|
| Managerial | 128 – 156 | First Degree or above (65.5%) |
| Executive/Supervisory | 330 – 404 | Sub-degree to First Degree (43.5%) Secondary 4 to Diploma/Certificate (54.8%) |
| Clerical/Craftsman/ Operative | 3 827 – 4 677 | Secondary 4 – 7 (49.8%) Secondary 3 or below (41.4%) |

Table 3.5B: Average Annual Training Requirement (Passenger Transport)
for the Next 2 Years (2019 – 2020)

| Job Level* | Recommended Annual Requirement | Preferred Education Level |
|----------------------------------|---------------------------------------|----------------------------------|
| Managerial | 74 – 90 | First Degree (96.2%) |
| Executive/Supervisory | 324 – 396 | First Degree (80.6%) |
| Clerical/Craftsman/ Operative | 1 890 – 2 310 | Secondary 7 or below (75.1%) |

(* Excluding 50,600 taxi and public light bus drivers)

Manpower Supply at Degree and Sub-degree Levels for 2019 – 2020

3.30 According to the information provided by University Grants Committee (UGC) and the Hong Kong Institute of Vocational Education (IVE), the projected number of graduates of transport and logistics related degree in 2019 and 2020 is 513 and 461 respectively, and the projected number of graduates of related higher diploma programmes in 2019 and 2020 is 343 and 209 respectively.

3.31 Since many higher diploma graduates would pursue further studies before entering the job market, the actual number of graduates entering Executive/Supervisory level jobs should be less than the number shown in Table 3.6 below. However, the estimated manpower supply is not exhaustive as there are other relevant self-financing post-secondary programmes. The industry may also consider graduates of other disciplines since jobs of some nature do not necessarily require the candidates to have formal training in transport and logistics, e.g. those related to customer service.

Table 3.6: Supply of Graduates at Managerial Level and Executive/Supervisory Level

| Training Institution | Programme | Estimated Number of Graduates | |
|------------------------|----------------|-------------------------------|------------|
| | | 2019 | 2020 |
| UGC Universities & IVE | Degree | 513 | 461 |
| | Higher Diploma | 343 | 209 |
| Total | | 856 | 670 |

3.32 More information on transport and logistics related programmes is given in *Appendix 7*.

D. Recommendations

3.33 Based on the survey findings and the business outlook of the industry, the Training Board has furnished the following recommendations.

New Business Opportunities

3.34 Industry practitioners should keep abreast of the latest development of the Greater Bay Area (GBA) and be more proactive in exploring new business opportunities and business models.

3.35 Training providers may arrange exchange or workplace attachment opportunities in GBA to their students to allow them to have an earlier exposure to these cities and be prepared to work there.

3.36 Industry associations and the Training Board may join hands to organise seminars and forums to provide platforms for industrial practitioners to share their expertise and insight in new markets or new business opportunities. Hot topics like cross-border e-commerce, the Belt and Road Initiative, GBA and industry-related technology may be considered.

Embracing Innovative Technology

3.37 While the boom in e-commerce provides a lot of business opportunities to the industry, it also drives drastic changes to logistics arrangement. Unlike traditional logistics, e-commerce logistics are characterised by smaller shipments, widespread delivery destinations and customers' expectation for real-time tracking and fast delivery of products. The use of technology like Big Data, Artificial Intelligence, robotic, Internet of Things would help

logistics service providers to anticipate shipments, automise warehouse operation, optimise delivery route, provide real-time parcel tracking, and even more. It is suggested that employers should take a proactive role to integrate new technology into their businesses. They may consider partnering with companies that offer technological solutions if they do not have relevant expertise themselves.

Attracting Young People into the Industry

3.38 The transport and logistics industry is usually perceived by the public as an industry offering low-skilled, low-technology and low-wage jobs. However, many of the current perceptions have not kept pace with advances in the industry. As new technology is transforming the industry, many in-service practitioners are using high-tech devices and are less involved in manual work in their daily routines. The industry also offers a number of jobs which are well paid and secured. The industry should step up promotion efforts to uplift the image of the industry and remove the dated misconception which deters new blood from joining.

3.39 One of the possible means is to make use of the Education Bureau's Business-School Partnership Programme (BSPP) to offer career exploration activities or career talks to secondary students to allow them to have a better understanding on the diversity of the jobs available in the industry, the career prospects as well as the actual working condition.

3.40 To foster a higher level of professionalism of the industry, employers are encouraged to help their employees to obtain recognised qualifications. For example, employers may encourage or subsidise their employees to obtain Qualifications Framework (QF) recognised qualifications by taking QF-recognised courses or through the Recognition of Prior Learning Mechanism.

3.41 Employers are recommended to make good use of the Maritime and Aviation Internship Network under the Maritime and Aviation Training Fund (MATF) to offer the younger generation the opportunities to have an early exposure to the career opportunities in the aviation and maritime sectors so as to encourage them to join the two sectors after graduation. Participating employers can reimburse the monthly honorarium paid to interns up to 75% or \$7,000 (with effect from 1 May 2019) (whichever is lower) for an internship period up to three months.

Training Needs of Employees

3.42 Training providers are encouraged to make use of the subsidised schemes available, e.g. MATF and the Out-Centre Course Scheme operated by the Training Board to offer suitable training to in-service practitioners, especially new technology applicable to the logistics industry and the most required competencies identified in the survey (e.g. cargo safety & security, customer relationship, handling of emergencies). Although some competencies are identified by employers as required by employees across various job levels, it is suggested that the content of training, in terms of width and depth, should be tailored to participants at different job levels.

3.43 To cope with the technological innovations of the industry, employers should encourage/help their employees to enhance digital literacy. For example, employers may consider organising training to their staff members making use of the Reindustrialisation and Technology Training Programme (RTTP), which is a funding scheme under the Innovation and Technology Fund that subsidises local companies to train their staff in advanced technologies. Or they may refer their colleagues to registered public courses of the RTTP.

Alleviation of Manpower Shortage

3.44 Employers should employ new operation mode or technology to reduce manual work and enhance operation efficiency so as to alleviate manpower pressure.

3.45 However, there are still a lot of job functions which cannot be replaced by machine or artificial intelligence, e.g. drivers or couriers. To compete talent with other industries, employers should offer more attractive remuneration package as well as progression paths to the employees. For jobs with limited room for promotion, employers should try to establish a better working environment and working relationship with employees to help retain talent.

3.46 Both the Government and employers should introduce measures to support re-engagement of older workers and participation of women into the labour market. For example, the Government should keep review the effectiveness of the “Employment Programme for the Elderly and Middle-aged” and consider expanding its scope when appropriate. Employers may also consider offering flexible working hours or more part-time posts which are less demanding to attract the elderly and women. The Government should also encourage employment of ethnic minorities and rehabilitated offenders and provide support services to both the employers and the employees.

Future Survey

3.47 To give a full picture on the manpower situation of the industry and to allow meaningful comparison of manpower across sectors, it is suggested that manpower information of seafarers should be included in the next survey.

3.48 Considering the Transport and Logistics Industry covers a wide spectrum of businesses and industry players, subject to availability of resources, qualitative studies may be conducted in future to obtain more in-depth manpower information of selected business operations, e.g. to explore the reasons for employment difficulties in different sectors and reasons for employees leaving the industry.

I. 緒論

背景

1.1 運輸及物流業訓練委員會（下稱「本會」）隸屬職業訓練局 [VTC]，職權範圍包括確定業界的人力需求，並就發展培訓設施應付人力需求，向 VTC 提供建議。本會成員來自各大行業商會、職工會、專業團體、教育與培訓機構及政府部門；成員名單及職權範圍分別載於附錄 1 及 2。

1.2 本會依據職權範圍，於 **2018 年 9 月至 12 月** 進行運輸及物流業人力調查，蒐集最新人力資料，以評估業內的人力需求及培訓需要。本報告載述 2018 年人力調查所得結果。

調查目的

1.3 是次人力調查旨在蒐集運輸及物流業的最新人力資料，調查重點包括以下幾方面：

- (a) 評估調查期間業界的人力情況；
- (b) 預測 2019 及 2020 年僱員人數；
- (c) 估計僱員的培訓需要；以及
- (d) 向 VTC 提出制訂培訓策略的建議，以配合業界需要。

調查範圍

1.4 抽樣調查對象涵蓋運輸及物流業公司，以及經營相關業務的公司。2016 年調查只涵蓋三個貨運業務界別，而是次調查則延伸至客運業，共覆蓋以下六大界別：

- (i) 貨運－陸運（包括倉庫）
- (ii) 貨運－海運（不包括倉庫）
- (iii) 貨運－空運
- (iv) 客運－陸運
- (v) 客運－海運
- (vi) 客運－空運

1.5 是次調查擴大了覆蓋範圍，所涵蓋的門類增至 14 個。門類 1 至 10 與貨運相關，屬 2016 年調查的範圍；門類 11 至 14 則與客運相關，屬本調查新涵蓋的門類。

門類 1：貨倉及冷藏庫

- (i) 通用貨倉及其他倉庫服務 (HSIC²¹ 5212)
- (ii) 冷藏庫 (HSIC 5211)
- (iii) 包裝及裝箱服務；驗貨、抽樣檢驗及其他倉庫服務 (HSIC 522904, 522905)

門類 2：貨運站

- (iv) 貨運站 (HSIC 522201)

門類 3：貨車及貨櫃運輸

- (v) 貨車運輸服務及其他陸路貨運服務 (HSIC 4927, 522103, 522903)
- (vi) 貨櫃拖運及貨櫃租賃服務 (HSIC 4928, 522204)
- (vii) 補充樣本－擁有大型車隊的公司

門類 4：空運承運

- (viii) 航空公司及空運輔助服務 (HSIC 5223, 510202)

門類 5：貨運代理

- (ix) 航空貨運代理服務 (HSIC 522901)
- (x) 海上貨運代理服務 (HSIC 522902)

門類 6：船上／碼頭裝卸貨物

- (xi) 貨物裝卸服務及其他海上運輸輔助服務 (HSIC 522202)

門類 7：國際速遞

- (xii) 國際速遞 (HSIC 5321)

門類 8：海運承運

- (xiii) 船務代理及管理人 (HSIC 5011, 5012)
- (xiv) 遠洋輪船營運者 (HSIC 501402)

²¹ HSIC為「Hong Kong Standard Industrial Classification 香港標準行業分類」英文簡稱。

門類 9：船舶管理及租賃

- (xv) 遠洋輪船船東 (HSIC 501302, 501502)
- (xvi) 船隻經紀 (HSIC 522906)
- (xvii) 港內水上貨運服務 (HSIC 5022)

門類 10：其他物流服務經營者

- (xviii) 補充樣本

門類 11：車輛及鐵路客運經營者

- (xix) 公共巴士 (HSIC 492100)
- (xx) 校車 (HSIC 492500)
- (xxi) 鐵路及纜索運輸 (HSIC 491000)
- (xxii) 配備司機的載客車輛出租服務 (HSIC 492601, 492602)

門類 12：水上客運經營者

- (xxiii) 海上運輸服務（包括珠江三角洲）(HSIC 501301, 501401, 501501, 502101, 502199)

門類 13：航空客運經營者

- (xxiv) 以香港作基地的航空公司及直升機公司 (HSIC 5101)
- (xxv) 海外航空公司的駐港辦事處（客運）(HSIC 510201)

門類 14：的士及公共小巴司機

- (xxvi) 透過職工會蒐集補充數據

選取樣本

1.6 抽樣方案的設計與選取樣本由香港特區政府統計處與 VTC 合作完成。為確保樣本具代表性及方便進行細項分析，是次調查共邀請 2 037 間機構參與，其中 2 009 間取自機構單位記錄庫²²，由統計處使用分層隨機抽樣的科學統計方法得出（包括三個機構層級：業務界別、門類、僱員數目）；另有 26 間機構（補充樣本）則是由本會建議納入，這些都是從事其他業務而聘用了運輸及物流員工的大公司，包括自設車隊運送貨物的貿易公司；餘下兩間機構是在調查期間新增的。

²² 統計處的「機構單位記錄庫」是一套電子資料庫，包含大約 40 萬間在港活躍從事業務的公司。記錄庫內的資料透過統計處不同調查及相關政府部門各項行政資料收集所得，每季更新。

問卷設計

1.7 本會透過有系統的問題蒐集數據，共設計了八份問卷，供不同業務界別的機構填寫。

- (a) 貨運－陸運 (FL)
- (b) 貨運－海運 (FS)
- (c) 貨運－空運 (FA)
- (d) 客運－陸運 (PL)
- (e) 客運－海運 (PS)
- (f) 客運－空運 (PA)
- (g) 貨運－陸／海／空運 (F3) (供業務涵蓋陸、海、空三個業務界別的機構填寫)
- (h) 貨運／客運－空運 (PF) (供業務涵蓋貨運及客運的機構填寫)

1.8 調查問卷樣本、附註及主要職務工作說明載於附錄 5。

數據蒐集方法

1.9 本會於進行調查前一周將整套調查文件（包括邀請信、調查問卷、附註、主要職務工作說明）郵遞／電郵至每間獲邀機構，並籲請機構負責人提供在統計資料截算日（即 2018 年 9 月 1 日）當天的人力資料。

1.10 本會將運輸及物流業職務分為以下五個職責範疇及三個職級，以便分析人力資料：

五個職責範疇：

- (a) 業務管理、計劃策略
- (b) 機隊、航隊、車隊營運及管理
- (c) 市場銷售及顧客服務
- (d) 貨物調度／乘客運輸、前線操作
- (e) 機械／技術支援

三個職級：

- (i) 經理級
- (ii) 行政／主任級
- (iii) 文員／技工／操作工級

1.11 問卷第一部分所列的「主要職務工作說明」由本會編製，詳述每個職務的工作。由於有些僱員需要同時負責多項職務，僱主需根據個別僱員的主要職責，填報其人力資料。

1.12 調查期間，統計員致電或造訪個別機構，協助機構人員填妥問卷，或收集已填妥的問卷。

質素管理措施

1.13 本會採取各種措施以確保調查蒐集數據的質素，包括調查前的準備、為調查人員提供充足培訓、監察調查的進行情況、採取措施提高回應率、核對填妥的問卷、雙重輸入資料以求準確、驗證所蒐集的數據等。

調查期及統計結果

1.14 是次人力調查於 2018 年 9 月至 12 月期間蒐集數據。在有效的樣本機構中，共有 881 間順利集得統計資料，另有 264 間不允提供資料，有效回應率為 77%²³。本會觀察到以下幾點：(i) 各門類的回應率令人滿意；(ii) 公眾熟識和具規模的機構大多回應了調查；(iii) 從樣本機構調查所得的結果可運用統計學方法倍大。本會總結認為，本報告書所載的調查結果足以反映本業的人力情況。

簡化數值

1.15 由於四捨五入關係，本報告內個別數字的總和未必等於總數。

局限

1.16 HSIC 根據公司所報稱的業務性質進行分類，因此對於並非註冊為運輸及物流公司的分包商，本調查蒐集的人力資料無法反映其人力情況。

²³ 無效樣本包括：機構暫停經營、不再從事運輸及物流業，又或沒有聘請任何運輸及物流員工等。有效回應率的計算方法是：「完整回覆」加「不完整回覆」，再除以回覆總數與「不予回覆」之和。

1.17 「客運－陸」業務界別中，大多數的士及公共小巴司機屬自僱人士。本報告所載的士及公共小巴司機的估計人數取自汽車交通運輸業總工會。至於宜有教育程度、員工流動情況、僱員宜有能力及人力預測等其他人力資料，是次調查並未能取得相關數據。

1.18 本調查首次涵蓋「客運」行業，因此沒有過往數據可用作比較或用於人力市場分析。「客運」行業的人力估算僅根據僱主預測而定。

1.19 海員並未納入在是次調查，因為相關人力數據過往是由海事服務業訓練委員會進行的調查蒐集所得。因此，參考海上運輸的數據時，宜注意海員的人力資料並未包括在內。

II. 調查結果

A. 運輸及物流業概覽

機構數目

2.1 表 2.1 顯示包括貨運及客運的行業機構分布。與 2016 年調查比較，貨運機構數目減少了 362 間。在不同的門類當中，「貨車及貨櫃運輸」的機構數目錄得最大跌幅（由 2016 年的 8 531 間減少至 2018 年的 7 845 間）。

表 2.1：機構分布

| 門類* | 機構數目 |
|------------|---------------|
| 貨運 | |
| 貨倉及冷藏庫 | 793 |
| 貨運站 | 7 |
| 貨車及貨櫃運輸 | 7 845 |
| 空運承運 | 71 |
| 貨運代理 | 3 166 |
| 船上／碼頭裝卸貨物 | 80 |
| 國際速遞 | 157 |
| 海運承運 | 248 |
| 船舶管理及租賃 | 150 |
| 其他物流服務經營者 | 13 |
| 小計 | 12 530 |
| 客運 | |
| 車輛及鐵路客運經營者 | 1 183 |
| 水上客運經營者 | 57 |
| 航空客運經營者 | 94 |
| 小計 | 1 334 |
| 總數 | 13 864 |

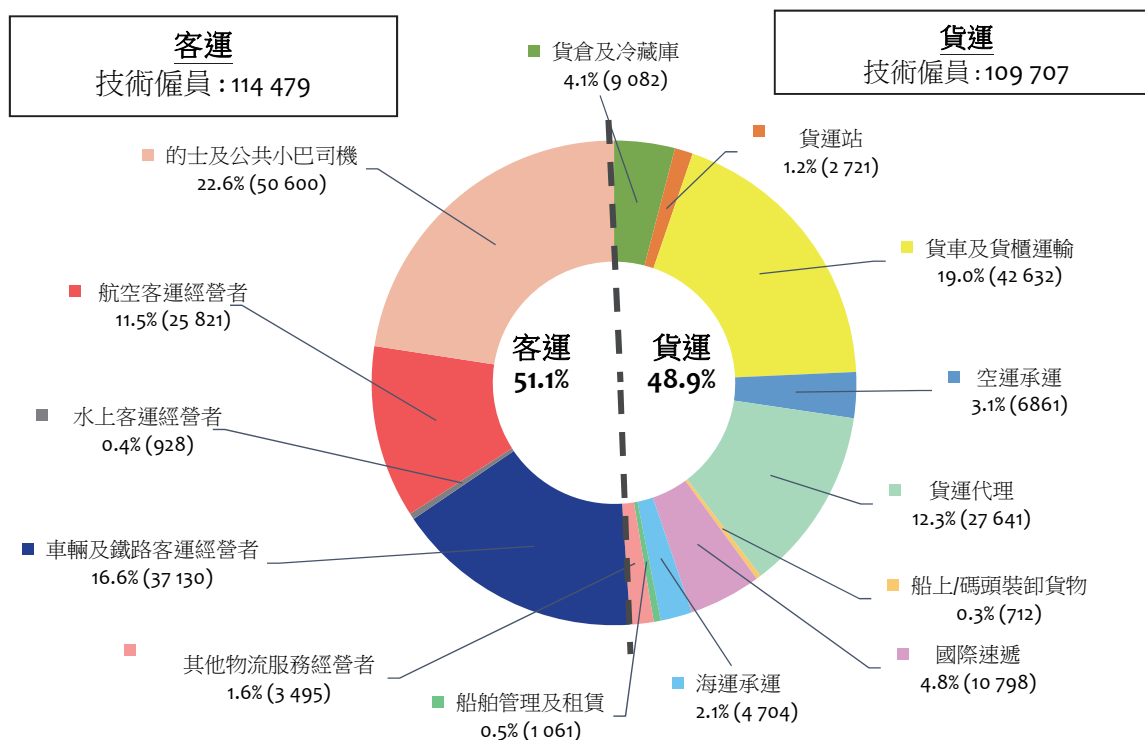
(*不包括的士及公共小巴司機。他們多數為自僱人士。)

僱員數目

2.2 調查顯示，在 2018 年 9 月，運輸及物流業共有 224 186 名僱員，約佔香港總就業人口 5.6%²⁴。其中，109 707 人（48.9%）來自貨運行業，其餘 114 479 人（51.1%）來自客運行業。

2.3 在不同門類當中，「的士及公共小巴司機」僱員人數最多，共 50 600 人，佔運輸及物流業僱員 22.6%。其次為「貨車及貨櫃運輸」，僱員人數為 42 632 人（19%）及「車輛及鐵路客運經營者」，僱員人數為 37 130 人（16.6%）。

圖 2.1：各門類僱員分布情況



2.4 有關的士及公共小巴司機，是次調查僅錄得其僱員人數。除非另有說明，否則下文所示的人力資訊／分析並不包括這 50 600 名的士及公共小巴司機。

2.5 扣除的士及公共小巴司機，「貨運 - 陸運」是僱員人數最多的業務界別（有 64 591 名僱員）。「客運 - 陸運」有 37 130 名僱員，「客運 - 空運」有 25 821 名僱員，分別為第二和第三僱員人數最多的界別。

²⁴ 根據政府統計處，2018年9月至11月期間錄得的勞動人口約為3 978 000人。

2.6 大多數僱員（72.7%）屬「文員／技工／操作工級」。其餘 17.2% 屬「行政／主任級」，10.1%屬「經理級」。各業務界別僱員分布的詳情，請參閱表 2.2。

表 2.2：僱員數目（按業務界別及職級劃分）

| 業務界別 | 職級 | | | 所有職級 |
|-------------|-----------------------|-----------------------|------------------------|-----------------------|
| | 經理級 | 行政／主任級 | 文員／技工／操作工級 | |
| 貨運 | | | | |
| 陸運 | 2 598 | 5 932 | 56 061 | 64 591 |
| 海運 | 3 790 | 3 432 | 12 308 | 19 530 |
| 空運 | 3 460 | 5 184 | 16 942 | 25 586 |
| 小計 | 9 848 | 14 548 | 85 311 | 109 707 |
| 客運 * | | | | |
| 陸運 | 1 611 | 7 484 | 28 035 | 37 130 |
| 海運 | 167 | 194 | 567 | 928 |
| 空運 | 5 959 | 7 608 | 12 254 | 25 821 |
| 小計 | 7 737 | 15 286 | 40 856 | 63 879 |
| 總數 | 17 585 (10.1%) | 29 834 (17.2%) | 126 167 (72.7%) | 173 586 (100%) |

(* 不包括 50 600 名的士及公共小巴司機)

空缺數目

2.7 調查期間僱主填報空缺共 6 875 個，相等於 3.8% 空缺率。客運的空缺率為 4.6%，較貨運（3.3%）為高。按業務界別劃分的空缺分布，載於表 2.3。

表 2.3：空缺分布（按業務界別劃分）

| 業務界別 | 貨運 | | 客運 * | |
|---------------|----------------|-------------------------|---------------|-------------------------|
| | 僱員數目 | 空缺數目 (空缺率) | 僱員數目 | 空缺數目 (空缺率) |
| 陸運 | 64 591 | 2 837 (4.2%) | 37 130 | 1 914 (4.9%) |
| 海運 | 19 530 | 192 (1.0%) | 928 | 24 (2.5%) |
| 空運 | 25 586 | 773 (2.9%) | 25 821 | 1 135 (4.2%) |
| 所有業務界別 | 109 707 | 3 802 (3.3%) | 63 879 | 3 073 (4.6%) |

(* 不包括的士及公共小巴司機)

文員／技工／操作工級僱員的年齡分布

2.8 調查顯示，客運僱員老化問題比貨運更嚴重。49.4% 的客運僱員年齡在 51 歲或以上，而貨運僱員當中只有 22.1% 處於該年齡組別。在六個業務界別中，「客運 – 陸運」似乎面對嚴峻的接班問題，當中 18.3% 的僱員年齡達到 61 歲或以上。

表 2.4：文員／技工／操作工級僱員的年齡分布

| 業務界別 | | 40 歲或以下 (%) | 41-50 歲 (%) | 51-55 歲 (%) | 56-60 歲 (%) | 61 歲或以上 (%) |
|--------|----|-------------|-------------|-------------|-------------|-------------|
| 貨運 | 陸運 | 30.4% | 44.0% | 14.0% | 9.3% | 2.2% |
| | 海運 | 47.0% | 28.6% | 8.1% | 4.3% | 12.0% |
| | 空運 | 48.9% | 41.2% | 5.0% | 3.8% | 1.1% |
| 貨運小計 | | 36.8% | 41.1% | 11.2% | 7.4% | 3.5% |
| 客運 * | 陸運 | 17.6% | 21.3% | 18.3% | 24.5% | 18.3% |
| | 海運 | 45.7% | 16.2% | 12.7% | 16.4% | 9.0% |
| | 空運 | 61.5% | 22.6% | 8.7% | 4.8% | 2.3% |
| 客運小計 | | 29.0% | 21.6% | 15.8% | 19.4% | 14.2% |
| 所有業務界別 | | 34.3% | 34.7% | 12.7% | 11.3% | 7.0% |

(* 不包括 50 600 名的士及公共小巴司機)

B. 貨運

僱員數目

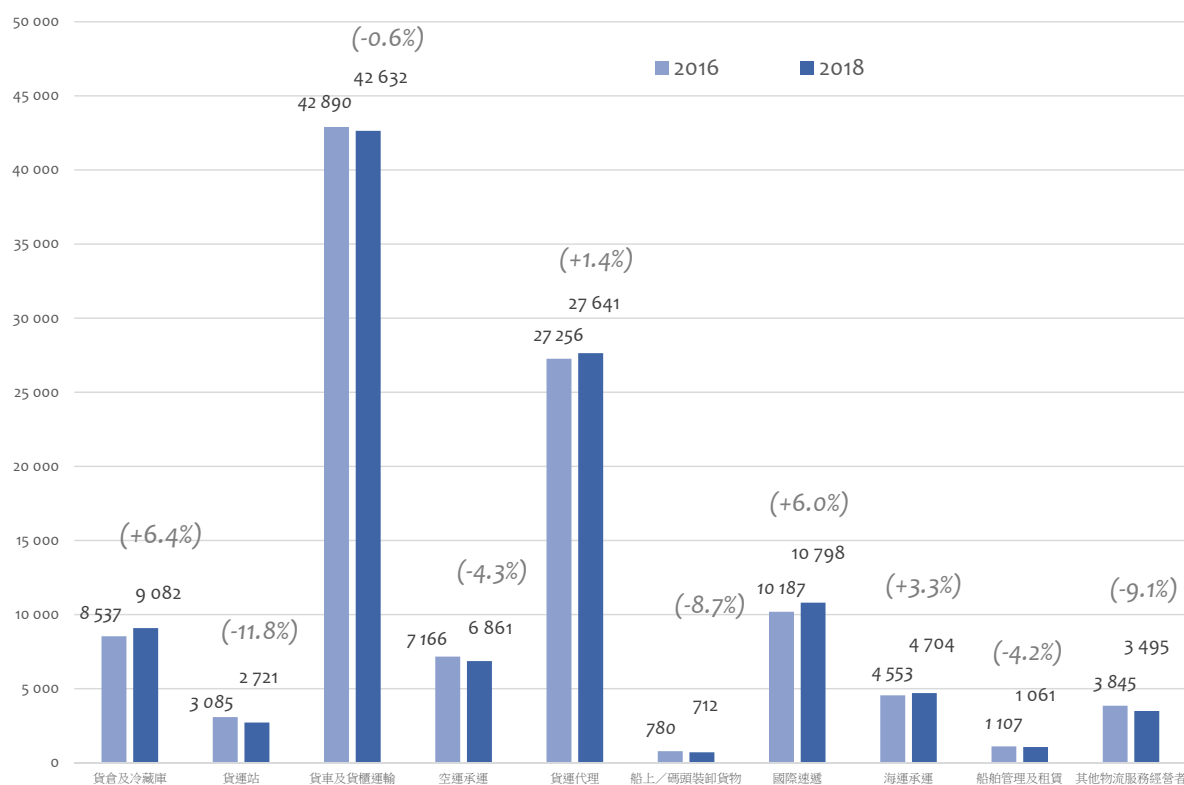
2.9 在 2018 年 9 月，共有 109 707 名僱員任職於貨運業，與 2016 年 109 406 名僱員比較，輕微增加了 0.3%。

2.10 在十個貨運門類中，「貨車及貨櫃運輸」的就業人數最多（有 42 632 名僱員）。排名第二及第三的是「貨運代理」和「國際速遞」，分別有 27 641 名和 10 798 名僱員。

2.11 與 2016 年相比，「貨倉及冷藏庫」和「國際速遞」的僱員數目增長率最高（分別為 6.4% 和 6.0%）。而「貨運站」（-11.8%）、「其他物流服務經營者」（-9.1%）、「船上／碼頭裝卸貨物」（-8.7%）、「空運承運」（-4.3%）、「船舶管理及租賃」（-4.2%）和「貨車及貨櫃運輸」（-0.6%）的僱員數目均減少了。

2.12 受到來自其他港口的激烈競爭，以及內地放寬貿易及航運政策的影響，香港作為內地轉口港的地位已逐步被削弱。香港的貨櫃吞吐量近年來持續下滑，導致「貨運站」和「船上／碼頭裝卸貨物」人力需求減少。「其他物流服務經營者」包括零售、貿易和製造業公司。與 2016 年相比，更多這類公司報稱他們並無運輸和物流人力。然而，該門類人力減少很大機會是由外判服務造成，未必代表該門類對物流服務的需求萎縮。至於「空運承運」，由於某些航空服務營運商同時提供貨運與客運服務，僱主有可能會將一部分僱員撥歸客運服務，導致填報的貨運僱員數目減少，這未必反映「空運承運」的人力需求縮減。

圖 2.2：貨運 - 僱員數目變化（按門類劃分）



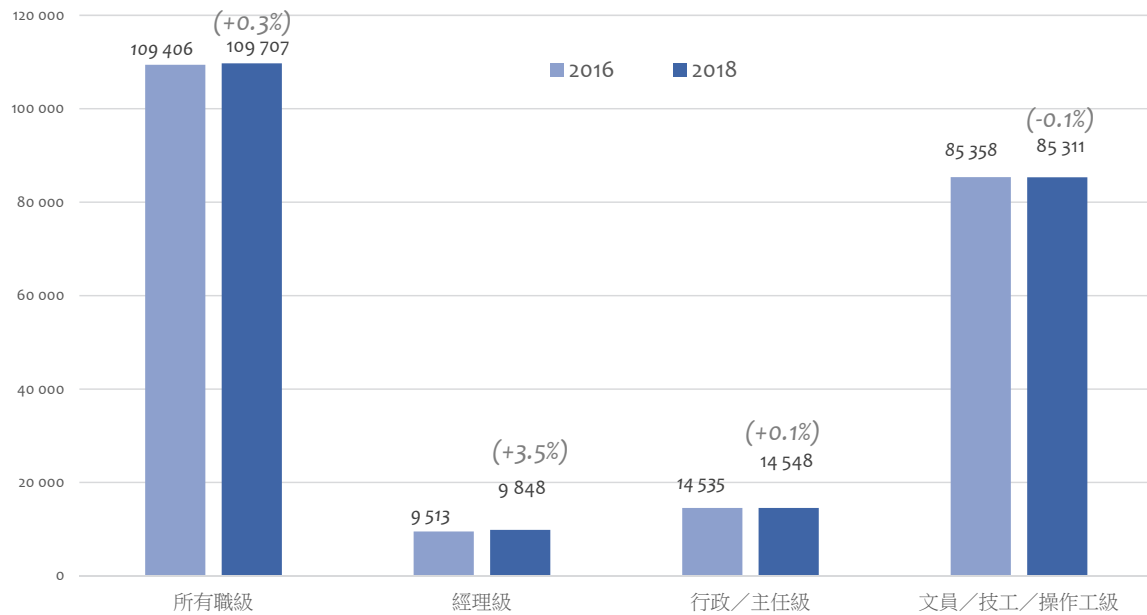
2.13 就職級而言，77.8% 的僱員為「文員／技工／操作工級」員工，13.3% 為「行政／主任級」人員，其餘 9.0% 則為「經理級」。僱員於不同職級的分布與上次 2016 年的調查類近。表 2.5 顯示按門類及職級劃分的僱員數目。

表 2.5：貨運 - 僱員數目（按門類及職級劃分）

| 門類 | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 | 所有職級 |
|---------------|---------------------|-----------------------|-----------------------|-----------------------|
| 貨倉及冷藏庫 | 685 | 1 311 | 7 086 | 9 082 |
| 貨運站 | 255 | 411 | 2 055 | 2 721 |
| 貨車及貨櫃運輸 | 1 330 | 3 581 | 37 721 | 42 632 |
| 空運承運 | 652 | 1 691 | 4 518 | 6 861 |
| 貨運代理 | 4 755 | 4 829 | 18 057 | 27 641 |
| 船上／碼頭裝卸 貨物 | 102 | 110 | 500 | 712 |
| 國際速遞 | 544 | 1 154 | 9 100 | 10 798 |
| 海運承運 | 1 160 | 1 120 | 2 424 | 4 704 |
| 船舶管理及租賃 | 290 | 190 | 581 | 1 061 |
| 其他物流服務 經營者 | 75 | 151 | 3 269 | 3 495 |
| 所有門類 | 9 848 (9.0%) | 14 548 (13.3%) | 85 311 (77.8%) | 109 707 (100%) |

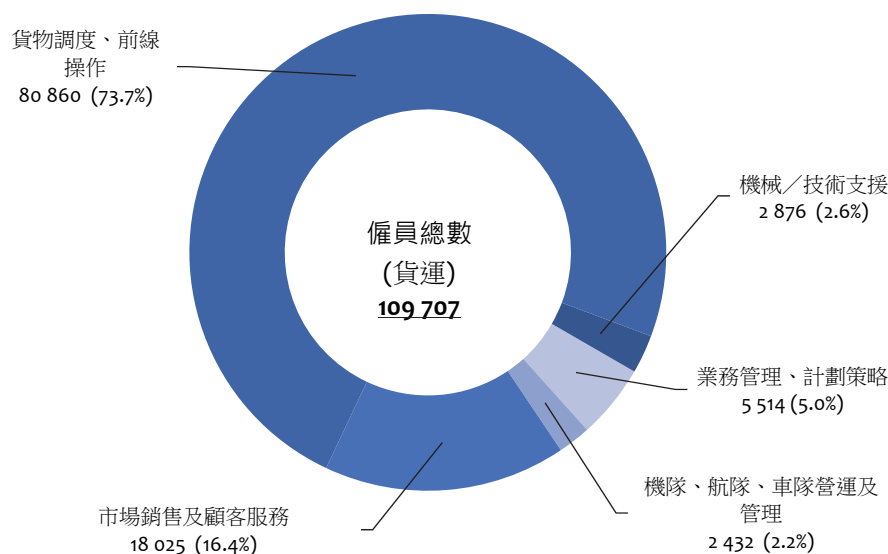
2.14 另外，「經理級」的僱員數目增加了 3.5%，而其他兩個職級的僱員數目在過去兩年保持穩定。圖 2.3 顯示 2016 至 2018 年間按職級劃分的僱員數目變化情況。

圖 2.3：貨運 - 僱員數目變化（按職級劃分）



2.15 圖 2.4 顯示不同職責範疇的僱員分布。最大部分的貨運僱員（73.7%）負責「貨物調度、前線操作」，其餘依次為「市場銷售及顧客服務」（16.4%）、「業務管理、計劃策略」（5.0%）和「機械／技術支援」（2.6%）。在五個職責範疇中，「機隊、航隊、車隊營運及管理」的僱員所佔比率最小（2.2%）。雖然分布模式與 2016 年的調查大致相同，但從事「業務管理、計劃策略」的僱員比例有所增加，從 2016 年的 3.7% 上升至 2018 年的 5.0%。

圖 2.4：貨運 - 僱員分布（按職責範疇劃分）



空缺數目

2.16 是次調查共錄得 3 802 個職位空缺，空缺率為 3.3%。與 2016 年的調查相比，空缺數目增加了 961 個。過去兩年，僱員人數僅輕微增加 301 名，而空缺數目則顯著增加，某程度上反映了行業難於填補空缺。「貨車及貨櫃運輸」、「貨倉及冷藏庫」、「空運承運」和「國際速遞」是四大空缺額最多的門類。「貨車及貨櫃運輸」共有 1 893 個空缺，佔貨運總空缺額近一半。就職級而言，大部分空缺來自「文員／技工／操作工級」。

表 2.6：貨運 - 空缺數目（按門類及職級劃分）

| 門類 | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 | 所有職級 |
|---------------|----------------------------|-----------------------------|-------------------------------|-------------------------------|
| 貨倉及冷藏庫 | 2 (0.3%) | 89 (6.4%) | 435 (5.8%) | 526 (5.5%) |
| 貨運站 | 0 (0%) | 1 (0.2%) | 22 (1.1%) | 23 (0.8%) |
| 貨車及貨櫃運輸 | 31 (2.3%) | 30 (0.8%) | 1 832 (4.6%) | 1 893 (4.3%) |
| 空運承運 | 3 (0.5%) | 63 (3.6%) | 360 (7.4%) | 426 (5.8%) |
| 貨運代理 | 26 (0.5%) | 32 (0.7%) | 205 (1.1%) | 263 (0.9%) |
| 船上／碼頭裝卸 貨物 | 0 (0%) | 0 (0%) | 3 (0.6%) | 3 (0.4%) |
| 國際速遞 | 4 (0.7%) | 20 (1.7%) | 377 (4.0%) | 401 (3.6%) |
| 海運承運 | 1 (0.1%) | 6 (0.5%) | 49 (2.0%) | 56 (1.2%) |
| 船舶管理及租賃 | 8 (2.7%) | 10 (5.0%) | 16 (2.7%) | 34 (3.1%) |
| 其他物流服務 經營者 | 3 (3.8%) | 0 (0%) | 174 (5.1%) | 177 (4.8%) |
| 所有門類 | 78 (0.8%) | 251 (1.7%) | 3 473 (3.9%) | 3 802 (3.3%) |

(括號內的數字代表空缺率)

僱主的人力預測

2.17 調查請僱主預測所屬機構在 2019 年 9 月和 2020 年 9 月的人力，結果顯示人力將輕微增加，年增長率分別為 0.75% 和 0.23%。僱主對各職級的人力預測 [EF] 見表 2.7。

表 2.7：貨運 - 僱主的人力預測（按職級劃分）

| 職級 | 2018 年人力 [^] | 人力預測 (增長率) | |
|------------|-----------------------|------------------------|------------------------|
| | | 2019 年 | 2020 年 |
| 經理級 | 9 926 | 10 006 (0.81%) | 10 033 (0.27%) |
| 行政／主任級 | 14 799 | 14 904 (0.71%) | 14 986 (0.55%) |
| 文員／技工／操作工級 | 88 784 | 89 447 (0.75%) | 89 604 (0.18%) |
| 總數 | 113 509 | 114 357 (0.75%) | 114 623 (0.23%) |

([^] 人力指僱員總數加空缺數目)

2.18 表 2.8 顯示按門類劃分的預測人力分布。所有門類均無重大的人力變動。根據僱主的預測，在所有門類中，「貨倉及冷藏庫」將有相對明顯的人力增長。

表 2.8：貨運 - 僱主的人力預測（按門類劃分）

| 門類 | 2018 年人力 | 人力預測 (增長率) | |
|-----------|----------------|------------------------|------------------------|
| | | 2019 年 | 2020 年 |
| 貨倉及冷藏庫 | 9 608 | 9 668 (0.62%) | 9 799 (1.35%) |
| 貨運站 | 2 744 | 2 793 (1.79%) | 2 767 (-0.93%) |
| 貨車及貨櫃運輸 | 44 525 | 45 021 (1.11%) | 45 111 (0.20%) |
| 空運承運 | 7 287 | 7 348 (0.84%) | 7 351 (0.04%) |
| 貨運代理 | 27 904 | 28 042 (0.49%) | 28 101 (0.21%) |
| 船上／碼頭裝卸貨物 | 715 | 712 (-0.42%) | 712 (0%) |
| 國際速遞 | 11 199 | 11 205 (0.05%) | 11 208 (0.03%) |
| 海運承運 | 4 760 | 4 803 (0.90%) | 4 805 (0.04%) |
| 船舶管理及租賃 | 1 095 | 1 093 (-0.18%) | 1 097 (0.37%) |
| 其他物流服務經營者 | 3 672 | 3 672 (0%) | 3 672 (0%) |
| 總數 | 113 509 | 114 357 (0.75%) | 114 623 (0.23%) |

僱主認為僱員宜有的教育程度

2.19 對於「經理級」人員，雖然大多數僱主（64.7%）屬意他們擁有學士學位，但近四分之一的僱主（24.6%）能接受他們的教育程度較低（即中七或以下）。而對「行政／主任級」人員，受訪僱主對他們宜有的教育程度看法不一。超過 50% 受訪僱主屬意「行政／主任級」人員具專上學歷（包括文憑／證書至學士學位），但 43.7% 受訪僱主認為中四至中七學歷亦足以勝任。至於「文員／技工／操作工級」人員，超過 90% 僱主只期望他們具有中七或以下學歷。

表 2.9：貨運 - 僱員宜有的教育程度（按職級劃分）

| 教育程度 | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 |
|-----------------|-------------|-------------|----------------|
| 研究生學位 | 0.8% | 0.3% | 0.0% |
| 學士學位 | 64.7% | 16.0% | 1.0% |
| 副學位 (例如高級文憑) | 6.7% | 27.4% | 3.3% |
| 文憑／證書 | 3.2% | 11.1% | 4.5% |
| 中四至中七 | 18.4% | 43.7% | 49.8% |
| 中三或以下 | 6.2% | 1.5% | 41.4% |
| 總數 | 100% | 100% | 100% |

僱員宜有能力

2.20 調查請受訪者指出在未來 12 個月內僱員需接受培訓的職能範疇。首三項適用於不同職級僱員的職能範疇見表 2.10A 至 2.10C。在十個職能範疇中，不同業務界別的僱主普遍選擇「貨物安全及保安」、「營銷、市場推廣及客戶服務」、「營運管理」三個範疇。

表 2.10A：空運及快遞 - 僱員宜有能力（按職級劃分）

| 職能範疇 | 空運及快遞 | | |
|--------------|-------|--------|----------------|
| | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 |
| 營運管理 | | | △ |
| 物流方案規劃及設計 | | | |
| 營銷、市場推廣及客戶服務 | △ | △ | |
| 貨物運輸及處理 | △ | | △ |
| 貨物安全及保安 | △ | △ | △ |
| 電子物流 | | | |
| 品質管理 | | | |
| 出入口文件處理 | | △ | |
| 保險及法律事務 | | | |
| 職業安全及健康 | | | |

表 2.10B：海運 - 僱員宜有能力（按職級劃分）

| 職能範疇 | 海運 | | |
|--------------|-----|--------|----------------|
| | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 |
| 營運管理 | △ | | △ |
| 物流方案規劃及設計 | | | |
| 營銷、市場推廣及客戶服務 | △ | △ | △ |
| 貨物運輸及處理 | | | △ |
| 貨物安全及保安 | | | |
| 電子物流 | | | |
| 品質管理 | | | |
| 出入口文件處理 | △ | △ | |
| 保險及法律事務 | | | |
| 職業安全及健康 | | △ | |

(△ 表示在某一業務界別中，不同職級最普遍被選取的首三項職能範疇)

表 2.10C：陸路運輸及分發／貨運站、倉庫及物流中心／支援及輔助服務 -
僱員宜有能力（按職級劃分）

| 職能範疇 | 陸路運輸及分發／ 貨運站、倉庫及物流中心／ 支援及輔助服務 | | |
|--------------|-------------------------------------|--------|----------------|
| | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 |
| 營運管理 | △ | △ | |
| 物流方案規劃及設計 | | | |
| 營銷、市場推廣及客戶服務 | | | |
| 貨物運輸及處理 | | | △ |
| 貨物安全及保安 | | △ | △ |
| 電子物流 | | | △ |
| 品質管理 | | | |
| 出入口文件處理 | △ | | |
| 保險、法律事務及遵守法規 | △ | △ | |
| 環境保護 | | | |

(△ 表示在某一業務界別中，不同職級最普遍被選取的首三項職能範疇)

C. 客運

僱員數目

2.21 調查顯示，在 2018 年 9 月，共有 114 479 名僱員任職於客運業，包括 50 600 名的士及公共小巴司機。除了僱員總數以外，以下所示的其餘人力資料只是基於抽樣調查機構整合得出的結果，未有反映的士及公共小巴司機相應的人力情況。

2.22 扣除的士及公共小巴司機，客運業共有 63 879 名僱員。其中，「車輛及鐵路客運經營者」聘用最多人員（37 130 人）。「水上客運經營者」僱員數目則最少（928 人）。

2.23 至於職級方面，大部分僱員（64%）為「文員／技工／操作工級」人員。「行政／主任級」及「經理級」人員分別佔僱員總數的 23.9% 及 12.1%。

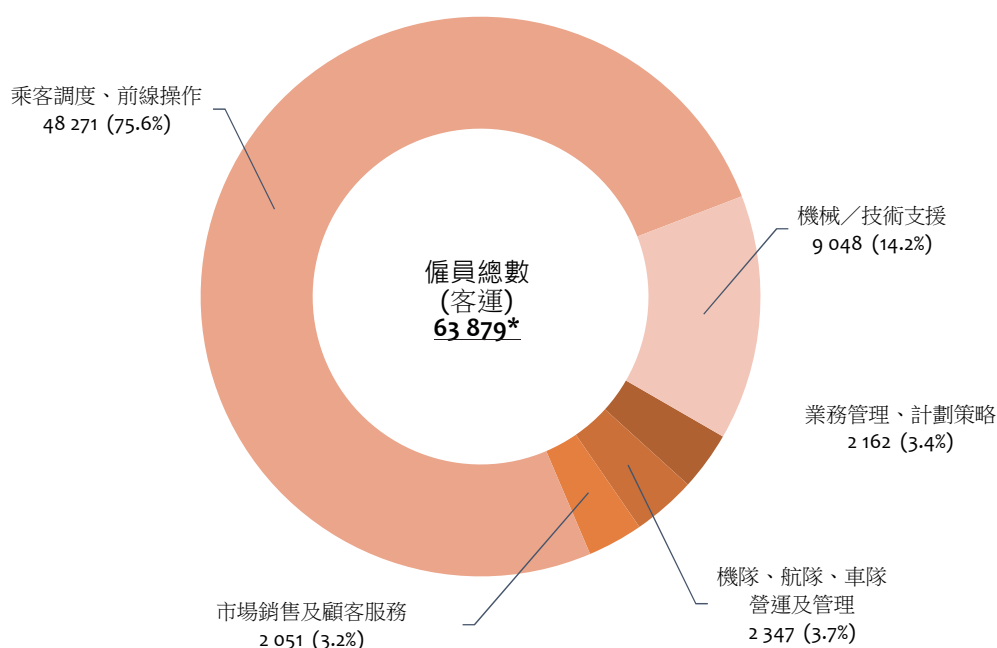
表 2.11：客運 - 僱員數目（按門類及職級劃分）

| 門類* | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 | 所有職級 |
|-------------|----------------------|-----------------------|-----------------------|----------------------|
| 車輛及鐵路客運經營者 | 1 611 | 7 484 | 28 035 | 37 130 |
| 水上客運經營者 | 167 | 194 | 567 | 928 |
| 航空客運經營者 | 5 959 | 7 608 | 12 254 | 25 821 |
| 所有門類 | 7 737 (12.1%) | 15 286 (23.9%) | 40 856 (64.0%) | 63 879 (100%) |

(* 不包括 50 600 名的士及公共小巴司機)

2.24 圖 2.5 顯示不同職責範疇的僱員分布。「乘客調度、前線操作」佔整體僱員人數最大部分（即 75.6%），其餘依次是「機械／技術支援」（14.2%）、「機隊、航隊、車隊營運及管理」（3.7%）及「業務管理、計劃策略」（3.4%）。負責「市場銷售及顧客服務」的僱員最少（3.2%）。與貨運相比，客運需要更多「機械／技術支援」人員，但「市場銷售及顧客服務」人員卻明顯較少。

圖 2.5：客運 - 僱員分布（按職責範疇劃分）



(* 不包括 50 600 名的士及公共小巴司機)

空缺數目

2.25 據受訪機構填覆，調查時客運業共有 3 073 個空缺，相等於 4.6% 整體空缺率。各個門類中，「車輛及鐵路客運經營者」的空缺率最高(4.9%)，實際空缺額亦最多(1 914 個空缺)。就職級而言，「行政／主任級」及「文員／技工／操作工級」的空缺率均為 4.7%，較「經理級」的空缺率(3.8%) 為高。

表 2.12：客運 - 空缺數目（按門類及職級劃分）

| 門類* | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 | 所有職級 |
|----------------|-----------------------------|-----------------------------|-------------------------------|-------------------------------|
| 車輛及鐵路客運 經營者 | 85 (5.0%) | 389 (4.9%) | 1 440 (4.9%) | 1 914 (4.9%) |
| 水上客運經營者 | 1 (0.6%) | 10 (4.9%) | 13 (2.2%) | 24 (2.5%) |
| 航空客運經營者 | 217 (3.5%) | 356 (4.5%) | 562 (4.4%) | 1 135 (4.2%) |
| 所有門類 | 303 (3.8%) | 755 (4.7%) | 2 015 (4.7%) | 3 073 (4.6%) |

(* 不包括的士及公共小巴司機)

2.26 有關「水上客運經營者」的數字需要謹慎詮釋。由於調查不包括海員，「水上客運經營者」的空缺數字，尤其是「文員／技工／操作工級」的空缺額，有可能被低估。

僱主的人力預測

2.27 與貨運業相似，客運業僱主預期 2019 年及 2020 年的人力增長非常輕微，年增長率分別為 0.55% 及 0.23%。僱主的人力預測（按職級、門類劃分）見表 2.13 及 2.14。

表 2.13：客運 - 僱主的人力預測（按職級劃分）

| 職級* | 2018 年人力 [^] | 人力預測 (增長率) | |
|------------|-----------------------|-----------------------|-----------------------|
| | | 2019 年 | 2020 年 |
| 經理級 | 8 040 | 8 042 (0.02%) | 8 041 (-0.01%) |
| 行政／主任級 | 16 041 | 16 068 (0.17%) | 16 102 (0.21%) |
| 文員／技工／操作工級 | 42 871 | 43 209 (0.79%) | 43 328 (0.28%) |
| 總數 | 66 952 | 67 319 (0.55%) | 67 471 (0.23%) |

表 2.14：客運 - 僱主的人力預測（按門類劃分）

| 門類* | 2018 年人力 [^] | 人力預測 (增長率) | |
|------------|-----------------------|-----------------------|-----------------------|
| | | 2019 年 | 2020 年 |
| 車輛及鐵路客運經營者 | 39 044 | 39 321 (0.71%) | 39 471 (0.38%) |
| 水上客運經營者 | 952 | 956 (0.42%) | 962 (0.63%) |
| 航空客運經營者 | 26 956 | 27 042 (0.32%) | 27 038 (-0.01%) |
| 總數 | 66 952 | 67 319 (0.55%) | 67 471 (0.23%) |

([^] 人力指僱員總數加空缺數目)

(* 不包括 50 600 名的士及公共小巴司機)

僱主認為僱員宜有的教育程度

2.28 對於「經理級」及「行政／主任級」人員，大多數僱主屬意他們擁有學士學位。而就「文員／技工／操作工級」人員，超過 70% 僱主只要求他們具有中七或以下學歷，另有近 20% 僱主屬意他們擁有副學位。

2.29 與貨運比較，客運業的僱主普遍要求他們的僱員擁有較高學歷。按職級劃分的僱員宜有教育程度見表 2.15。

表 2.15：客運 - 僱員宜有的教育程度（按職級劃分）

| 教育程度 | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 |
|-----------------|---------------|---------------|----------------|
| 研究生學位 | 0.0% | 0.0% | 0.0% |
| 學士學位 | 96.2% | 80.6% | 1.8% |
| 副學位 （例如高級文憑） | 1.0% | 10.7% | 19.3% |
| 文憑／證書 | 0.5% | 1.7% | 3.9% |
| 中四至中七 | 1.8% | 6.6% | 21.9% |
| 中三或以下 | 0.4% | 0.4% | 53.2% |
| 總數 | 100.0% | 100.0% | 100.0% |

僱員宜有能力

2.30 調查請受訪者指出在未來 12 個月內僱員需接受培訓的職能範疇。首三項適用於不同職級僱員的職能範疇見表 2.16。僱主認為不同職級的僱員均最需要「客戶關係／投訴處理」、「管理／督導／訓練技巧／策略管理」、「銷售及市務推廣」及「突發事情應變」的培訓。

表 2.16：客運 - 僱員宜有能力（按職級劃分）

| 職能範疇 | 職級 | | |
|-----------------|-----|--------|----------------|
| | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 |
| 管理／督導／訓練技巧／策略管理 | △ | △ | |
| 客戶關係／投訴處理 | △ | △ | △ |
| 銷售及市務推廣 | △ | | △ |
| 採購 | | | |
| 財務及會計 | | | |
| 操作特別用途車輛／工具 | | | |
| 交通法律和法規 | | | |
| 人群控制 | | | |
| 急救 | | | |
| 突發事情應變 | | △ | △ |
| 機械維修及保養 | | | |

(△ 表示某一職級首三項最普遍被選取的職能範疇)

D. 人力流動情況

流動情況

2.31 在調查前 12 個月內，共有 22 913 名運輸及物流業僱員（包括貨運及客運）離職。流動率佔整體 173 586 名僱員的 13.2%（不包括 50 600 的士及公共小巴司機，因未能取得相關人力資料）。

2.32 離職僱員的去向摘錄於表 2.17。

表 2.17：離職僱員去向（按職級劃分）

| 去向 | 職級 | | | 所有職級 |
|---|--------------------|----------------------|------------------------|----------------------|
| | 經理級 | 行政／主任級 | 文員／技工／操作工級 | |
| 繼續於運輸及物流業任職／創業 | 144 (0.63%) | 211 (0.92%) | 3 637 (15.87%) | 3 992 (17.42%) |
| 並無繼續於運輸及物流業任職 (例如，於其他行業任職／創業、移民、退休或進修) | 41 (0.18%) | 131 (0.57%) | 1 323 (5.77%) | 1 495 (6.52%) |
| 去向未明 | 616 (2.69%) | 1 257 (5.49%) | 15 553 (67.88%) | 17 426 (76.05%) |
| 總數 | 801 (3.50%) | 1 599 (6.98%) | 20 513 (89.53%) | 22 913 (100%) |

(括號內的數字代表佔整體數字的百分率)

流失情況

2.33 流失是指永久離開本業的僱員百分率，包括轉職至非運輸及物流業相關工作、退休、移民或其他原因離開本業。為了進行分析，「去向未明」的僱員數目按比例歸入表 2.18 所示的兩類去向。經統計方法調整後，估算 6 262 名僱員永久離開本業。

表 2.18：離開本業的僱員數目（按職級劃分）

| 去向 | 職級 | | | 所有職級 |
|--|--------------------|----------------------|------------------------|----------------------|
| | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 | |
| 繼續於運輸及物流業任職／ 創業 | 623 (2.72%) | 987 (4.31%) | 15 041 (65.65%) | 16 652 (72.67%) |
| 並無繼續於運輸及物流業 任職 (例如，於其他行業任職／ 創業、退休或進修) | 178 (0.77%) | 612 (2.67%) | 5 472 (23.88%) | 6 262 (27.33%) |
| 總數 | 801 (3.50%) | 1 599 (6.98%) | 20 513 (89.53%) | 22 913 (100%) |

(括號內的數字代表佔整體數字的百分率)

流失率

2.34 運輸及物流業整體流失率為 3.61%。三個職級的流失率介乎 1.01% 至 4.34%。

表 2.19：各職級的流失率

| | 職級 | | | 所有職級 |
|-------------|--------------|--------------|----------------|--------------|
| | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 | |
| 僱員總數 | 17 585 | 29 834 | 126 167 | 173 586 |
| 永久離開本業的僱員數目 | 178 | 612 | 5 472 | 6 262 |
| 流失率 | 1.01% | 2.05% | 4.34% | 3.61% |

新聘僱員

2.35 在調查前 12 個月內，運輸及物流業新聘用了 20 226 名僱員。超過 60% 受聘者來自其他運輸及物流機構，運輸及物流課程應屆畢業生只佔新聘僱員 1.4%。

表 2.20：新聘僱員來源（按職級劃分）

| 來源 | 職級 | | | 所有職級 |
|-------------------------|--------------------|--------------------|------------------------|----------------------|
| | 經理級 | 行政／主任級 | 文員／技工／ 操作工級 | |
| 來自其他運輸及物流業機構 | 359 (1.77%) | 508 (2.51%) | 11 644 (57.57%) | 12 511 (61.86%) |
| 來自其他行業 | 52 (0.26%) | 134 (0.66%) | 3 831 (18.94%) | 4 017 (19.86%) |
| 於院校／培訓機構修畢運輸及物流課程的應屆畢業生 | 2 (0.01%) | 14 (0.07%) | 268 (1.33%) | 284 (1.40%) |
| 其他 | 137 (0.68%) | 259 (1.28%) | 3 018 (14.92%) | 3 414 (16.88%) |
| 總數 | 550 (2.72%) | 915 (4.52%) | 18 761 (92.76%) | 20 226 (100%) |

（括號內的數字代表佔整體數字的百分率）

III. 結論與建議

A. 人力變化趨勢

3.1 本會仔細審視調查結果後，認為結果可大致反映運輸及物流業在調查期間的人力情況。

3.2 2018年9月，運輸及物流業的總人力為231 061人（包括224 186名僱員及6 875個有待填補的空缺）。其中，貨運業人力為113 509人（包括109 707名僱員及3 802個空缺），客運業人力為117 552（包括114 479名僱員及3 073個空缺）。由於調查首次涵蓋客運業，並無相關的過往資料可供比較，故以下所述的人力變化只限於貨運業。

3.3 2008年至2018年期間各門類的人力變化見表3.1。「貨倉及冷藏庫」的人力過去呈明顯增長的趨勢。然而，「貨運站」、「船上／碼頭裝卸貨物」及「船舶管理及租賃」的人力則自2014年起呈溫和下降的趨勢。

表3.1：貨運 - 2008年至2018年期間人力變化（按門類劃分）

| 門類 | 2008 | 2010 | 2012 | 2014 | 2016 | 2018 |
|-----------|----------------|----------------|----------------|----------------|----------------|----------------|
| 貨倉及冷藏庫 | 6 535 | 6 559 | 6 835 | 7 850 | 8 813 | 9 608 |
| 貨運站 | 5 403 | 2 852 | 3 058 | 3 164 | 3 149 | 2 744 |
| 貨車及貨櫃運輸 | 43 517 | 43 628 | 43 873 | 44 655 | 44 230 | 44 525 |
| 空運承運 | 4 230 | 7 309 | 8 231 | 6 914 | 7 474 | 7 287 |
| 貨運代理 | 30 102 | 28 397 | 30 763 | 28 229 | 27 793 | 27 904 |
| 船上／碼頭裝卸貨物 | 1 846 | 1 230 | 944 | 810 | 780 | 715 |
| 國際速遞 | 3 662 | 8 893 | 10 322 | 10 613 | 10 324 | 11 199 |
| 海運承運 | 4 090 | 2 288 | 2 930 | 4 218 | 4 589 | 4 760 |
| 船舶管理及租賃 | 不適用 | 1 719 | 1 171 | 1 163 | 1 116 | 1 095 |
| 其他物流服務經營者 | 1 284 | 1 430 | 1 396 | 3 660 | 3 979 | 3 672 |
| 總數 | 100 669 | 104 305 | 109 523 | 111 276 | 112 247 | 113 509 |

註：「船舶管理及租賃」於2008年納入「海運承運」門類；2010年所載資料為僱員數目。

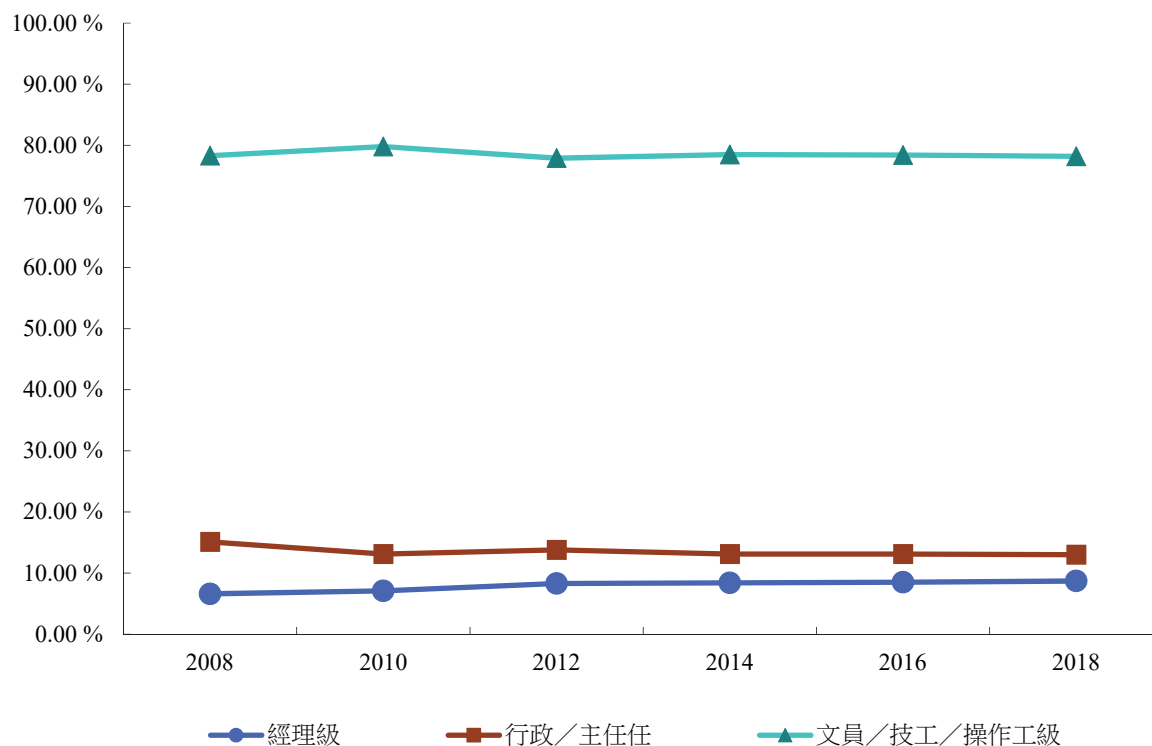
3.4 各職級人力變化見表 3.2 及圖 3.1。「經理級」人員在過往十年所佔比例持續上升。全球經濟不穩、區內競爭激烈，加上客戶要求日增，令運輸及物流業面對巨大挑戰，公司或需要更多經理級人員負責制訂策略，協助機構在複雜的經營環境中保持競爭力。

表 3.2：貨運 - 2008 年至 2018 年期間各職級人力變化

| 職級 | 2008 | 2010 | 2012 | 2014 | 2016 | 2018 |
|------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| 經理級 | 6 614 (6.6%) | 7 435 (7.1%) | 9 038 (8.3%) | 9 312 (8.4%) | 9 546 (8.5%) | 9 926 (8.7%) |
| 行政／主任級 | 15 204 (15.1%) | 13 677 (13.1%) | 15 127 (13.8%) | 14 564 (13.1%) | 14 680 (13.1%) | 14 799 (13.0%) |
| 文員／技工／操作工級 | 78 851 (78.3%) | 83 193 (79.8%) | 85 358 (77.9%) | 87 400 (78.5%) | 88 021 (78.4%) | 88 784 (78.2%) |
| 總數 | 100 669 | 104 305 | 109 523 | 111 276 | 112 247 | 113 509 |

(括號內數字代表各職級佔該年總人力的百分比)

圖 3.1：貨運 - 各職級人力變化



B. 業務展望

3.5 本會對運輸及物流業前景審慎樂觀。本會預期，只要從業員能善用香港的競爭優勢，把握新的商機，不斷自我增值，業界在未來數年將能保持穩定發展，人力亦會錄得溫和增長。

3.6 營商環境愈趨複雜，要保持競爭力，本會建議從業員應關注下列挑戰及機遇，了解這些影響行業增長的主要因素。

挑戰

3.7 大部分貨運公司以國際市場為服務對象，故此貨運業容易受到外圍經濟環境影響。此外，香港是再出口貿易樞紐。2017年，本地出口僅佔出口貨物總值1%，其餘99%來自再出口貨物²⁵。全球經濟發展存在很多不穩定因素，尤其是美國與中國之間的貿易關係緊張，將影響香港再出口貿易及對物流服務的需求。

3.8 中國內地持續推行開放貿易及港口政策，香港的轉口港地位已日漸被削弱。另外，製造業務由中國內地遷往南亞的新興經濟體，對香港物流服務的需求亦隨之減少。香港港口的貨運吞吐量已於2018年進一步跌至全球第七名²⁶。

3.9 面對區內其他地方(包括中國內地、新加坡及其他亞洲國家)的激烈競爭，加上營運成本高、土地不足，令貨運服務供應商的經營環境持續惡化，利潤亦因而減少。

3.10 嚴格的規管要求亦為業界增添壓力。舉例說，國際民航組織將由2021年6月起實施新政策，把空運貨物的安檢百分比提高至100%²⁷，物流公司的營運成本難免增加。

3.11 港珠澳大橋開通亦影響了內河客運業務，惟全面影響仍有待觀察。

3.12 近年，貨運及客運業在招聘及挽留人才方面均面對重大挑戰，前線或操作工級人員的情況尤甚。客運業前線操作人員的老化問題尤其顯著，其中司機佔大多數。另外，雖然本調查並無涵蓋海員，海運界別也反映，船舶人員的老化問題同樣嚴重。

²⁵ 資料來源：政府統計處《香港商品貿易統計》

²⁶ 資料來源：海事處

²⁷ 資料來源：民航處

機遇

3.13 儘管面臨上述種種挑戰，香港仍有傳統優勢，支持運輸及物流業持續發展，當中包括：優越地理位置、具國際視野的人才、自由經濟、海關效率、簡單稅制、完善基建和多式聯運。業界或可善用這些既有優勢發掘新的機遇和市場。

3.14 香港的空運貨物及客運吞吐量近年持續增長。2018年，香港國際機場的空運貨物吞吐量位居全球榜首，客運吞吐量亦排名第四²⁸。隨著引入三跑道系統（目標完工日期為2024年），香港國際機場將有能力每年接待約一億人次乘客及處理900萬噸貨物²⁹。於香港國際機場南貨運專區的過路灣現正興建高端物流中心，預計2023年投入運作，屆時將成為亞洲的智能物流樞紐，支援發展迅速的全球電子商貿業務，包括處理藥品等溫控產品。這些改善設施將進一步鞏固香港在區內航空樞紐的地位。

3.15 儘管葵涌貨櫃碼頭近年來的貨運吞吐量一直下降，政府及碼頭營運商為了提升碼頭在區內的整體競爭力，已採取措施提高碼頭處理量。舉例說，通往貨櫃碼頭的藍巴勒海峽已完成挖深工程，提供足夠水深供新一代特大貨櫃輪於港口停泊。政府亦將會分階段提供更多後勤用地供堆放貨櫃。2019年1月，四個碼頭營運商公布成立香港海港聯盟³⁰，達成聯合操作協議，透過共用同一碼頭操作系統，促使整體泊位和堆場規劃更具彈性，務求提升處理能力。

3.16 《粵港澳大灣區發展規劃綱要》將香港定位為國際金融、航運、貿易中心和國際航空樞紐。在國家層面的支持下，相信香港與其他大灣區城市能達致優勢互補，並以綜合協調的方式推動發展。大灣區是一個龐大的市場，人口達7 000萬，本地生產總值達1.5萬億美元³¹。港珠澳大橋及廣深港高速鐵路香港段使香港與大灣區更為緊密聯繫，亦為香港帶來新的商機。

3.17 根據規劃綱要所載的發展重點，香港特區政府致力加強本港作為國際物流樞紐的地位，並支持發展高增值海運服務（例如海事法律、保險、融資及仲裁）。政府現正落實一系列措施，加強海運業發展，例如：提供利得稅減免，以推動船舶海運保險業務。香港海運港口局亦受託制訂稅務或其他措施，吸引船舶融資公司在香港設立辦事處，並將香港發展為亞太地區

²⁸ 資料來源：香港國際機場

²⁹ 資料來源：香港國際機場

³⁰ 資料來源：香港國際貨櫃碼頭有限公司

³¹ 資料來源：政制及內地事務局

的船舶租賃中心³²。2018年《施政報告》亦宣布向「海運及空運人才培訓基金」注資二億元，培育行業專才。

3.19 電子商貿業務持續增長，相信還有大量發展空間。為了滿足顧客的期望，加快運送小包裹的需求將不斷增加，亦會刺激航空貨運、倉務及「最後一哩運送」服務的需求。

3.19 與貨運不同，客運服務的需求大多由本地主導，故其需求較穩定，較少受到全球經濟變化的影響。2017年12月，公共交通系統（包括鐵路、電車、巴士、小巴、的士和渡輪）每日約接載1 270萬人次³³。預計到2021年，整體公共交通乘客需求將會上升，每日客量將達約1 320萬人次³⁴。

3.20 2017年，鐵路系統每日載客550萬人次，是載客量最多的交通工具。鑑於港鐵在2021年至2031年間會新增鐵路線、延線及車站，這些工程完成後將需要額外人手。

3.21 鐵路未來仍會是香港客運系統的骨幹。到2021年，本地其他公共交通工具的市場佔有率將與現時水平大致相若：專營巴士約佔30%，公共小巴接近15%，非專營巴士近乎2%，的士接近8%，電車約1%，渡輪約1%³⁵，故其他交通工具服務在未來數年內大概會維持穩定的人力需求。

3.22 2018年，香港國際機場客運量達7 470萬人次，按年增長2.5%，主要受惠於香港居民外遊人數增加所帶動³⁶。隨著不同航空公司推出新航線，加上政府撥出額外資源，加強推廣香港作為首選旅遊目的地，相信航空客運的需求會繼續穩步增長。

3.23 香港特區與內地的社會和經濟聯繫日趨緊密，加上跨境交通基建有所改善（例如位於蓮塘／香園圍的新邊境管制站），預計跨境客運需求在未來幾年內亦會持續增長。

3.24 政府亦已推行或正籌備措施，改善運輸及物流業的營商環境。例如，因應業界訴求，小巴座位數目已增至19個。而為了吸引新血成為司機，政府建議放寬現時商用車輛駕駛執照的申請資格，由持有有效私家車或輕型貨車的駕駛執照最少三年減至一年。

³² 資料來源：2019-20年度《財政預算案》

³³ 資料來源：運輸署2018年《運輸資料年報》

³⁴ 資料來源：運輸及房屋局—2017年《公共交通策略研究》

³⁵ 資料來源：運輸及房屋局《鐵路發展策略2014》

³⁶ 資料來源：香港國際機場

C. 未來人力預測

貨運業人力預測

3.25 本會採用人力市場分析法 [LMA]，透過分析一系列反映本地經濟、人口結構及人力市場重大變化的關鍵統計數據／經濟指標，推算運輸及物流業的年度人力需求。

3.26 本會採用「主要組成部分分析法」精減變數，從多項經濟指標篩選歸納變數／組成部分，再建構並維持統計模型。LMA 的詳細說明載於附錄 12。以僱主預測及 LMA 推算的貨運業人力預測載於表 3.3。

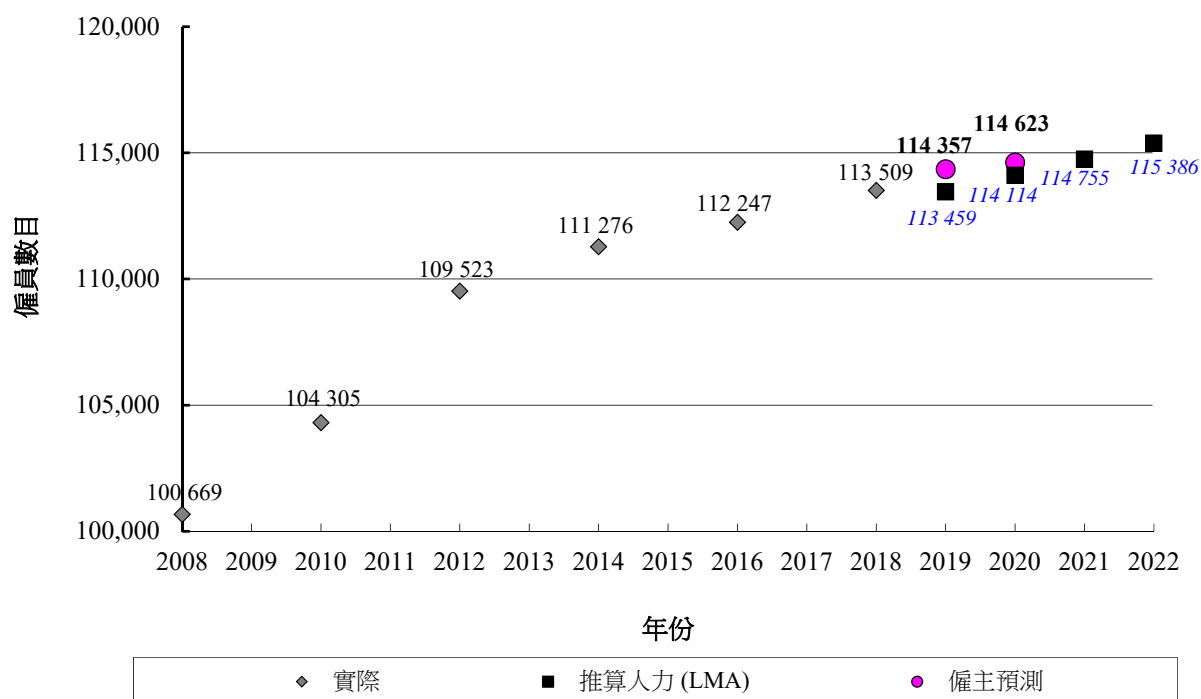
表 3.3：貨運 - 2019 年至 2022 年人力預測

| 年份 | 實際人力 | 推算人力（每年增長率） | |
|------|---------|-----------------|------------------|
| | | 僱主預測 | 人力市場分析法 |
| 2018 | 113 509 | - | - |
| 2019 | - | 114 357 (0.75%) | 113 459 (-0.04%) |
| 2020 | - | 114 623 (0.23%) | 114 114 (0.58%) |
| 2021 | - | - | 114 755 (0.56%) |
| 2022 | - | - | 115 386 (0.55%) |

貨運業人力變化趨勢

3.27 自 2008 年以來，貨運業人力一直呈增長趨勢，但近年來增長停滯不前。調查期間，受訪者預測未來兩年的人力只有輕微增幅。LMA 亦顯示，2019 年至 2022 年間的人力增長微乎其微。下圖顯示貨運業自 2008 年以來的人力增長趨勢。由於 LMA 與僱主的預測非常接近，本會採用 LMA 預測來估算貨運業每年的培訓需求。

圖 3.2：貨運 - 2008 年至 2022 年人力趨勢



客運業人力變化

3.28 是次定期調查首次納入客運業界別，故並無過往數據可用作 LMA 人力預測。因此，本會根據僱主的預測推算客運業 2019 年至 2020 年的人力。

表 3.4：客運 - 2019 年至 2020 年人力預測

| 年份 | 實際人力* | 推算人力（每年增長率） |
|------|--------|----------------|
| | | 僱主預測 |
| 2018 | 66 952 | - |
| 2019 | - | 67 319 (0.55%) |
| 2020 | - | 67 471 (0.23%) |

(*不包括 50 600 名的士及公共小巴司機)

每年培訓需求

3.29 本會根據每年預測增長率和流失率，估計貨運業和客運業的培訓需求；詳見表 3.5A 和 3.5B。

表 3.5A：貨運 - 未來四年平均每年培訓需求（2019 年至 2022 年）

| 職級 | 建議每年需求 | 宜有教育程度 |
|------------|---------------|--------------------------------------|
| 經理級 | 128 – 156 | 學士學位或以上 (65.5%) |
| 行政／主任級 | 330 – 404 | 副學位至學士學位 (43.5%) 中四至文憑／證書 (54.8%) |
| 文員／技工／操作工級 | 3 827 – 4 677 | 中四至中七 (49.8%) 中三或以下 (41.4%) |

表 3.5B：客運 - 未來兩年平均每年培訓需求（2019 年至 2020 年）

| 職級* | 建議每年需求 | 宜有教育程度 |
|------------|---------------|---------------|
| 經理級 | 74 – 90 | 學士學位 (96.2%) |
| 行政／主任級 | 324 – 396 | 學士學位 (80.6%) |
| 文員／技工／操作工級 | 1 890 – 2 310 | 中七或以下 (75.1%) |

(*不包括 50 600 名的士及公共小巴司機)

2019 年至 2020 年學士學位及副學位畢業生人數

3.30 根據大學教育資助委員會（下稱「教資會」）及香港專業教育學院 [IVE] 提供的資料，2019 年及 2020 年運輸及物流業相關學士學位課程畢業生估計分別有 513 名及 461 名；2019 年及 2020 年相關高級文憑畢業生人數則估計分別有 343 人及 209 人。

3.31 許多高級文憑畢業生在投身就業市場前會選擇繼續升學，因此擔任行政／主任級職位的畢業生實際人數應少於表 3.6 所載數字。不過，由於市場上還有其他相關的自資專上課程，估計畢業生數字未能涵蓋全面人力供應情況。再者運輸及物流業內某些性質的工作（例如客戶服務），未必需要求職者具備運輸及物流的正規訓練，因此業界也可考慮聘請其他學科的畢業生。

表 3.6：經理級及行政／主任級畢業生供應人數

| 培訓機構 | 課程 | 估計畢業生人數 | |
|--------------|------|------------|------------|
| | | 2019 年 | 2020 年 |
| 教資會資助大學及 IVE | 學士學位 | 513 | 461 |
| | 高級文憑 | 343 | 209 |
| 總數 | | 856 | 670 |

3.32 更多運輸及物流業相關課程的資料見附錄 7。

D. 建議

3.33 因應調查結果和未來業務展望，本會有以下建議。

開發新機遇

3.34 從業員宜密切留意大灣區的最新發展，更積極探索新的商機和商業模式。

3.35 培訓機構可安排學生到大灣區交流或參與工作實習，讓他們儘早接觸這些城市，做好在大灣區工作的準備。

3.36 行業協會和本會可攜手舉辦研討會和論壇，讓從業員透過這些平台，分享對開拓新市場或新商機的專業知識和灼見。可考慮的主題包括：跨境電子商務、「一帶一路」倡議、大灣區和行業相關科技。

支持創新科技應用

3.37 電子商務蓬勃發展，為業界帶來大量商機，同時令物流操作須要大幅改變。有別於傳統物流，電子商務物流的特點是出貨量較小，送貨目的地範圍廣泛，顧客亦期望能實時追蹤運送過程和迅速送達。運用大數據、人工智能、機械人及物聯網等技術，將有助物流服務供應商預測貨運情況、實施倉庫營運自動化、優化送遞路線、實時追蹤包裹等等。僱主宜積極將新科技融入業務中。如公司內部未有相關專才，可考慮與提供技術解決方案的機構合作。

吸引年輕新血

3.38 公眾經常視運輸及物流業職務為低技能、低技術和低工資的工作。然而，現時社會許多看法並未跟上行業的發展步伐。新科技正為行業帶來變革，許多從業員正使用高科技設備執行職務，日常工作亦較少涉及體力勞動；業內更有不少高薪而穩定的工種。業界宜加強宣傳，提升行業形象，消除過時誤解，否則會令新人卻步。

3.39 教育局的商校合作計劃是其中一個可善用的平台，透過舉辦職業探索活動或職業講座，讓中學生更了解本業多元化的工種、事業前景及實際工作情況。

3.40 為提高行業專業性，僱主可考慮協助僱員取得認可資歷。例如，僱主可鼓勵或資助僱員報讀資歷架構 [QF] 認可課程，又或透過「過往資歷認可」機制取得 QF 認可資歷。

3.41 僱主亦宜善用「海運及空運人才培訓基金」[MATF]的海運和航空業實習計劃，為年輕一代提供機會，讓他們儘早認識航空和海運界別的事業機遇，鼓勵他們畢業後投身這些界別。參與計劃的僱主可獲發還支付予實習生的酬金，每月上限為 75% 或 7,000 元（2019 年 5 月 1 日起生效）（以較低者為準），資助期最長三個月。

從業員的培訓需要

3.42 培訓機構宜善用現有的各項資助計劃，例如：MATF 及由本會負責的外間課程計劃，為從業員提供適切培訓，特別是適用於物流業的新科技，以及調查所顯示僱員最需要具備的能力（例如：貨物安全及保安、客戶關係、突發事情處理）。儘管僱主認為某些能力是各職級僱員均需具備的，本會建議應按不同職級僱員的需要調整培訓內容的廣度和深度。

3.43 因應行業採用創新科技的趨勢，僱主宜鼓勵／協助僱員提高數碼素養。例如，僱主可透過「再工業化及科技培訓計劃」[RTTP] 為員工安排培訓。RTTP 是創新及科技基金下的資助計劃，資助本地公司培訓員工學習先進科技。僱主亦可推薦同事參加 RTTP 下的公開課程。

紓緩人力短缺

3.44 僱主宜應用新的營運模式或科技，協助減少體力勞動工作和提高工作效率，紓緩人手壓力。

3.45 然而，仍有許多職務無法由機器或人工智能取代，例如：司機或速遞員。為了與其他行業競逐人才，僱主應為僱員提供更具吸引力的薪酬待遇及晉升階梯。對於晉升空間有限的工作，僱主應嘗試營造更佳的工作環境，並與僱員建立良好工作關係，以挽留人才。

3.46 政府和僱主都應該推出措施，支援較年長人士及婦女重新投入或參與勞動市場。例如，政府應繼續檢討「中高齡就業計劃」的成效，並在適當情況下考慮擴闊服務範疇。僱主亦可考慮提供靈活工時或開設更多工作要求相對不高的兼職職位，吸引年長人士和婦女。政府也應鼓勵少數族裔和更生人士就業，並為僱主和僱員提供支援服務。

未來調查

3.47 為全面了解運輸及物流業的人力情況，並有效比較各業務界別的人力，建議下次調查納入海員的人力資料。

3.48 運輸及物流業涵蓋廣泛業務和業界人士，如資源許可，日後可進行質性研究，更深入蒐集有關特定業務營運的人力資料，例如：探討不同業務界別招聘困難的原因，以及僱員離職原因。

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VOCATIONAL TRAINING COUNCIL

**Membership of the Transport and Logistics Training Board
(1 April 2018 to 31 March 2019)**

| | Nominated by |
|---|--|
| Chairman | |
| Ir Dr HO Chi-shing, David, JP | Ad personam |
| Members | |
| Ms CHENG Yuen-chi, Lily | The Hong Kong Shipowners Association |
| Dr CHEUNG Ting-on, Lewis | A local tertiary institution |
| Mr CHO Chi-cheong, Eddie | The Goods Vehicle Fleet Owners Association Limited |
| Mr FENG Jia-pei, Gilbert | The Institute of Seatransport |
| Ms KONG Sau-han, Donna | The Hong Kong International Courier Association |
| Mr KUO Wen-jung (up to 31 May 2018) | The Hong Kong Godown Association Limited |
| Mr LAU Yi-sau, Frosti | The Carrier Liaison Group |
| Dr LEUNG Kit-nam, Francis | A local tertiary institution |
| Mr LEUNG Tak-hing (up to 10 July 2018) | A ferry company |
| Ms LUI Yuen-nga, Alice | The Hongkong Association of Freight Forwarding and Logistics Limited |
| Dr NG Ka-Chui, Isaac | The Chartered Institute of Logistics and Transport in Hong Kong |
| Ms Kelly TAM | The Hong Kong Container Terminal Operators Association Limited |
| Dr TANG Wai-chung, Alex | The Hong Kong Logistics Association |
| Mr WONG Ho-leung, Lu | A railway company |
| Mr WONG Man-sum, Eric | The Hong Kong Sea Transport and Logistics Association Limited |

Mr WONG Shun-ye, M.H.
(up to 8 April 2018)

A local airline company

Mr YAP Thian-chai, Simon

An air cargo terminal

Mr YEUNG Lin-pik

The Harbour Transportation Workers General Union

Mr KWONG Ka-yin
(up to 3 October 2018)

Representing the Commissioner for Transport

Mr HO Kwan-hang, Albert
(since 4 October 2018)

Dr LAM Wai-keung, Wallace

Representing the Executive Director of the
Vocational Training Council

Secretary

Mr HO Wai-man, Homer
(up to 10 July 2018)

Vocational Training Council

Ms CHOW Pik-shan, Aristo
(since 11 July 2018)

職業訓練局
運輸及物流業訓練委員會
委員名單
(二零一八年四月一日至二零一九年三月三十一日)

提名機構

主席

何志盛 博士工程師，JP

獨立人士

委員

鄭婉芝 女士

香港船東會

張定安 博士

本地教育／訓練機構

曹志昌 先生

貨車車隊聯會有限公司

馮佳培 先生

海運學會

江秀嫻 女士

香港國際速遞協會

郭文榮 先生

香港貨倉聯合會有限公司

(截至 2018 年 5 月 31 日)

劉爾修 先生

航空公司貨運聯絡小組

梁傑南 博士

本地教育／訓練機構

梁德興 先生

渡輪公司

(截至 2018 年 7 月 10 日)

呂院雅 女士

香港貨運物流業協會有限公司

吳家鎚 博士

香港運輸物流學會

譚群娣 女士

香港貨櫃碼頭商會有限公司

鄧惠忠 博士

香港物流協會

黃浩樑 先生

鐵路公司

黃文森 先生

香港航運物流協會有限公司

王舜義 先生，M.H.

本地航空公司

(截至 2018 年 4 月 8 日)

葉天財 先生

空運貨站公司

楊連碧 先生

海港運輸業總工會

鄭家彥先生

(截至 2018 年 10 月 3 日)

何均衡先生

(自 2018 年 10 月 4 日起)

林偉強博士

運輸署署長代表

職業訓練局執行幹事代表

秘書

何維文先生

(截至 2018 年 7 月 10 日)

周碧珊女士

(自 2018 年 7 月 11 日起)

職業訓練局

VOCATIONAL TRAINING COUNCIL

Terms of Reference of Training Board

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

職業訓練局

訓練委員會職權範圍

1. 確定業內的人力需求，包括收集、分析相關的人力和學生／學員統計數字，以及關於社會經濟、科技及人力市場發展的資料。
2. 評估及研究本業的人力供求是否平衡。
3. 就發展業內職業專才教育及訓練設施應付人力需求，向職業訓練局（下稱「局方」）提供意見。
4. 就相關學科的課程發展策略及質素保證，向局方提出建議。
5. 擬訂本業主要職務的工作範圍，界定所需的技能及知識，審議訓練方案，包括訂定每種技能所需的訓練期。
6. 對技術評估、技能測驗及認證制度提供意見，以確定從業員、學徒及見習員的技能水平。
7. 就本業主要行業舉辦技能比賽提供意見，以推廣職業專才教育和派員參加國際賽事。
8. 與僱主、僱主聯會、工會、專業團體、訓練及教育機構、政府部門等聯絡，共商本業職業專才教育的發展與推廣事宜。
9. 為本業舉辦有關職業專才教育的研討會和會議。
10. 就訓練委員會工作和相關職業專才教育課程之推廣宣傳，向局方提供意見。
11. 每年向局方呈交訓練委員會工作報告，以及相關學科課程發展策略建議。
12. 根據《職業訓練局條例》第 7 條，負責局方所委派的其他工作。

VOCATIONAL TRAINING COUNCIL
Transport and Logistics Training Board
Working Party on 2018 Manpower Survey

| | |
|---------------------------|-------------|
| Dr CHEUNG Ting-on, Lewis | (Convenor) |
| Ms KWOK Chui-man, Jodi | (Member) |
| Mr LAM Tin-fu | (Member) |
| Mr WONG Man-sum, Eric | (Member) |
| Mr WONG Tak-kwong, Thomas | (Member) |
| Mr YEUNG Lin-pik | (Member) |
| Ms LAM Shui-kwan, Karen | (Member) |
| Ms CHOW Pik-shan, Aristo | (Secretary) |

職業訓練局

運輸及物流業訓練委員會

二零一八年人力調查工作小組委員名單

| | |
|-------|-------|
| 張定安博士 | (召集人) |
| 郭翠雯女士 | (委員) |
| 林天賦先生 | (委員) |
| 黃文森先生 | (委員) |
| 王德光先生 | (委員) |
| 楊連碧先生 | (委員) |
| 林瑞君女士 | (委員) |
| 周碧珊女士 | (秘書) |

VOCATIONAL TRAINING COUNCIL

**Transport and Logistics Training Board
External Industry Experts for 2018 Manpower Survey**

| | |
|---------------------------|--------------------------------------|
| Mr LEUNG Yiu-fai, David | MTR Academy |
| Mr CHEUNG Kwok-wai, Demen | New World First Ferry Services Ltd |
| Ms Wing YIM | The Kowloon Motor Bus Co. (1933) Ltd |
| Ms Emily CHOW | Forward Transportation Co. Ltd |
| Ms Nancy FAN | Pacific Basin Shipping (HK) Ltd |

職業訓練局

運輸及物流業訓練委員會
二零一八年人力調查焦點小組名單

| | |
|-------|----------------|
| 梁耀輝先生 | 港鐵學院 |
| 張國偉先生 | 新世界第一渡輪服務有限公司 |
| 嚴詠嫻女士 | 九龍巴士(一九三三)有限公司 |
| 周漸珍女士 | 進明貨運有限公司 |
| 范蘭絲女士 | 太平洋航運集團有限公司 |

Headquarters (Industry Partnership) 總辦事處(行業合作)
 30F, Billion Plaza II, 10 Cheung Yue Street, Cheung Sha Wan, Kowloon, Hong Kong
 香港九龍長沙灣長裕街10號億京廣場2期30樓
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Our Reference 本局檔號

Your Reference 來函檔號

NAME OF ESTABLISHMENT:

機構名稱

ADDRESS:

地址

SERIAL NO.:

(PRE - PRINTED)

1st September 2018

Dear Sir/Madam,

**The 2018 Manpower Survey of the
Transport and Logistics Industry**

The Transport and Logistics Training Board (the Training Board) of the Vocational Training Council (VTC), appointed by the Chief Executive of the Hong Kong Special Administrative Region (HKSAR), is responsible for matters pertaining to manpower training in the industry. In order to collect the latest manpower information for formulating recommendations on future manpower training, the Training Board will conduct the captioned survey from September to October 2018. I am writing to enlist your help by providing the relevant information by **mid-October 2018** and your co-operation would be much appreciated.

I enclose the following documents for your reference and completion:

- (a) The Questionnaire;
- (b) Explanatory Notes (Appendix A);
- (c) Job Descriptions for Principal Jobs (Appendix B)

The VTC has appointed **Consumer Search Group (CSG)** to assist in conducting the above survey. During the survey period, the enumerator of CSG will contact your establishment for the survey and answer the questions you may have. If necessary, visit will be made to your establishment to assist in completing and collecting the questionnaire. Alternatively, you may return the copy of the completed questionnaire to CSG via fax (2833 6771) or email (vtc_mps18tl@csg-worldwide.com).

I wish to assure you that the information provided will be handled **in strict confidence** and published on aggregate basis without reference to individual establishments.

The Manpower Survey Report will be uploaded onto the VTC website after completion of the survey. Should you have any queries, please do not hesitate to contact the following hotline during 9:30 a.m. to 6:00 p.m. from Monday to Friday.

- ✧ For matters regarding completion and return of questionnaire(s) or if you would like to make an appointment for the visit, please contact Ms Rebecca WAN of CSG at 2257 3769.
- ✧ In case you want to approach VTC directly, please contact Mr. Alpha LEE of VTC Manpower Survey (Statistical Team) at 3907 6613.

Yours faithfully,

(Ir Dr HO Chi-shing, David, JP)
 Chairman
 Transport and Logistics Training Board

Encl.

Headquarters (Industry Partnership) 總辦事處(行業合作)
30F, Billion Plaza II, 10 Cheung Yue Street, Cheung Sha Wan, Kowloon, Hong Kong
香港九龍長沙灣長裕街10號億京廣場2期30樓
www.vtc.edu.hk

Telephone No 電話

Facsimile No 傳真

3748 9400

Our Reference 本局檔號

Your Reference 來函檔號

執事先生／女士：



運輸及物流業
二〇一八年人力調查

職業訓練局（VTC）屬下運輸及物流業訓練委員會（訓練委員會）由香港特別行政區行政長官委任，負責就業內人力訓練事宜提供意見。本會將於二〇一八年九月至十月期間進行調查，蒐集業內人力情況的最新資料，並按此為未來人力訓練制訂適當建議。謹代表訓練委員會致函，懇請 貴機構惠予合作，於二〇一八年十月中或之前提供相關資料，以便進行上述人力調查。

茲夾附下述文件，供 貴機構參閱及填寫：

- (1) 調查問卷；
- (2) 附註（附錄 A）；
- (3) 主要職務工作說明（附錄 B）

VTC已委託**精確市場研究集團（精確市場研究）**協助進行是次人力調查。調查期間，精確市場研究的統計員將聯絡 貴機構進行訪問及解答相關問題。如有需要，統計員會造訪 貴機構協助填寫並收回已填妥的問卷。貴機構亦可將完成的問卷，以傳真（2833 6771）或電郵（vtc_mps18tl@csg-worldwide.com）方式交回精確市場研究。

調查所得的資料將**絕對保密**，局方在發表報告時，只會公布合計數字，不會提及個別機構情況。

人力調查報告將於調查完結後上載本局網頁。如對調查有任何查詢，請於星期一至五上午九時半至下午六時聯絡以下人士：

- ✧ 如查詢有關填寫及寄回問卷事宜或需預約到訪時間，請與精確市場研究溫頌詩女士聯絡（電話：2257 3769）。
- ✧ 如希望直接與 VTC 聯絡，請致電 VTC 人力調查（統計組）李漢明先生（電話：3907 6613）。

運輸及物流業訓練委員會主席
何志盛博士工程師，JP

二〇一八年九月一日
附件

**CONFIDENTIAL**

WHEN ENTERED WITH DATA

填入數據後即成

機密文件**VOCATIONAL TRAINING COUNCIL****職業訓練局****THE 2018 MANPOWER SURVEY OF THE TRANSPORT AND LOGISTICS INDUSTRY****運輸及物流業 2018 年人力調查**

The 2018 Manpower Survey of the Transport and Logistics (TL) Industry aims at collecting manpower information of the sector concerned for formulating recommendations on future manpower training. Please kindly provide the information of your establishment as at **1st September 2018** by answering the questionnaire. Thank you.

運輸及物流業2018年人力調查旨在蒐集業內人力情況的最新資料，並按此為未來人力訓練制訂適當建議。懇請 貴機構根據**2018年9月1日**的人力情況填寫此問卷。多謝合作。

Establishment Information**機構資料**

NAME OF COMPANY: _____

公司名稱

ADDRESS: _____

地址

PRINCIPAL LINE OF BUSINESS:

主要業務

Freight Transport 物流運輸

Others (Please Specify) 其他（請註明）: _____

TOTAL NO. OF PERSONS ENGAGED: _____

僱員總人數

(For official use)

Industry Code _____

Details of Contact Person***聯絡人資料***

NAME OF PERSON TO CONTACT: _____

聯絡人姓名

POSITION: _____

職位

TEL. NO.: _____ - _____

電話

FAX NO.: _____

圖文傳真

E-MAIL: _____

電郵

* The information provided will be used for the purpose of this and subsequent manpower surveys.
所提供資料將用作是次及日後人力調查之用。

Part I – Manpower Information
第一部份 – 人力情況

Survey Reference Date: 1st September 2018
統計日期：2018年9月1日

Please complete columns 'B' to 'F' of the questionnaire according to the list of principal jobs by referring to Appendix B for job description of individual job.

請根據列表中的主要職務，並參考附錄B有關各種職務的工作說明來填寫表內各欄 'B' 至 'F'。

(A) Principal Jobs 主要職務

| Please refer to Appendix A for column explanations. 請參考附錄A內各欄的說明。 | | | | | | |
|--|--|---|--|--|--|---|
| (A) Principal Job 主要職務 (See Appendix B) (參閱附錄 B) | (A1) Examples of Job Titles 職位例子 | (B) No. of Employees as at 1st September 2018 在2018年9月1日 的僱員人數 | (C) No. of Vacancies as at 1st September 2018 在2018年9月1日 的空缺額 | (D) Forecast of No. of Employees as at September 2019 預計在 2019年9月的 僱員人數 | (E) Forecast of No. of Employees as at September 2020 預計在 2020年9月的 僱員人數 | (F) Preferred Level of Education 僱員宜有教育程度 Code 編號 1. Postgraduate Degree 研究生學位 2. First Degree 學士學位 3. Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) 4. Diploma/Certificate 文憑/證書 5. Secondary 4 to 7 中四至中七 6. Secondary 3 or below 中三或以下 |
| e.g. 例子: Job Title A (3 employees and 2 vacancies) 職位甲 (3名僱員及2個空缺) | | 3 | 2 | 5 | 6 | 3 |
| AIR TRANSPORT BUSINESS & OPERATION (EXCLUDING WAREHOUSE AND DEPOT) 空運業務及有關操作 (不包括倉庫及碼頭) | | | | | | |
| 1. Business Management, Strategic Planning 業務管理、計劃策略 | | | | | | |
| 111 Job Code 職位 編號 | Managerial Level 經理級 | e.g. Business Manager, Operations Controller 例如：業務經理、營運總監 | | | | |
| 112 | Executive/Supervisory Level 行政/主任級 | e.g. Business Support Supervisor, Operations Supervisor 例如：業務支援主任、營運主任 | | | | |
| 113 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Business Support Assistant, Operation Officer 例如：業務支援助理、營運人員 | | | | |
| 2. Fleet Operation and Management 機隊營運及管理 | | | | | | |
| 121 | Managerial Level 經理級 | e.g. Cargo Services Manager, Airport Operations Manager 例如：空運服務經理、機場營運經理 | | | | |
| 122 | Executive/Supervisory Level 行政/主任級 | e.g. Cargo Services Supervisor, Flight Operations Support Supervisor 例如：空運服務主任、航運支援主任 | | | | |
| 123 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Cargo Services Officer, Flight Operations Support Assistant 例如：空運服務人員、航運支援助理 | | | | |
| 3. Sales & Customer Service 市場銷售及顧客服務 | | | | | | |
| 131 | Managerial Level 經理級 | e.g. Sales Manager, Business Development Manager 例如：銷售經理、業務拓展經理 | | | | |
| 132 | Executive/Supervisory Level 行政/主任級 | e.g. Sales Executive, Customer Services Supervisor 例如：銷售主任、客戶服務主任 | | | | |
| 133 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Sales Officer, Customer Services Officer 例如：銷售員、客戶服務員 | | | | |
| 4. Frontline Cargo Operation 貨物調度、前線操作 | | | | | | |
| 141 | Managerial Level 經理級 | e.g. Logistics Manager, Pilot 例如：物流經理、機長 | | | | |
| 142 | Executive/Supervisory Level 行政/主任級 | e.g. Logistics Executive, Aircraft Service Coordinator 例如：物流主任、空運服務主任 | | | | |
| 143 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Airport Services Support Assistant, Ground Handling Services Support 例如：停機坪助理、貨運裝卸員 | | | | |
| 5. Technical/Engineering Support 機械/技術支援 | | | | | | |
| 151 | Managerial Level 經理級 | e.g. Aircraft Maintenance Engineer, Engineering Manager 例如：飛機保養工程師、工程經理 | | | | |
| 152 | Executive/Supervisory Level 行政/主任級 | e.g. Maintenance Supervisor, Engineer Supervisor 例如：保養主任、工程主任 | | | | |
| 153 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Maintenance Trainee, Mechanics 例如：維修見習、機械技工 | | | | |

Please refer to Appendix A for column explanations. 請參考附錄A內各欄的說明。

| Job Code 職位 編號 | (A) Principal Job 主要職務 (See Appendix B) (參閱附錄 B) | (A1) Examples of Job Titles 職位例子 | (B) No. of Employees as at 1st September 2018 在2018年9月1日 的僱員人數 | (C) No. of Vacancies as at 1st September 2018 在2018年9月1日 的空缺額 | (D) Forecast of No. of Employees as at September 2019 預計在 2019年9月的 僱員人數 | (E) Forecast of No. of Employees as at September 2020 預計在 2020年9月的 僱員人數 | (F) Preferred Level of Education 僱員宜有教育程度 Code 編號 1. Postgraduate Degree 研究生學位 2. First Degree 學士學位 3. Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) 4. Diploma/Certificate 文憑/證書 5. Secondary 4 to 7 中四至中七 6. Secondary 3 or below 中三或以下 |
|---|---|--|---|--|--|--|---|
| | Please enter a zero '0' in the box if no employee/vacancy. 如沒有僱員/空缺，請在方格內填入 '0'。 | | | | | | |
| SEA TRANSPORT BUSINESS & OPERATION (EXCLUDING WAREHOUSE) [NOT INCLUDING SEAFARERS] 海運業務及有關操作 (不包括倉庫) [不包括船員] | | | | | | | |
| 1. Business Management, Strategic Planning 業務管理、計劃策略 | | | | | | | |
| 211 | Managerial Level 經理級 | e.g. Business Manager, Operations Controller 例如：業務經理、營運總監 | | | | | |
| 212 | Executive/Supervisory Level 行政/主任級 | e.g. Business Support Officer, Operations Officer 例如：業務支援主任、營運主任 | | | | | |
| 213 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Business Support Assistant, Operation Clerk 例如：業務支援助理、營運文員 | | | | | |
| 2. Fleet Operation and Management 航隊營運及管理 | | | | | | | |
| 221 | Managerial Level 經理級 | e.g. Seafreight Operations Manager, Fleet Manager 例如：海運營運經理、航隊經理 | | | | | |
| 222 | Executive/Supervisory Level 行政/主任級 | e.g. Seafreight Officer, Shipment Officer 例如：海運主任、裝運主任 | | | | | |
| 223 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Seafreight Logistics Assistant, Operation Support Assistant 例如：海運物流助理、貨運支援助理 | | | | | |
| 3. Sales & Customer Service 市場銷售及顧客服務 | | | | | | | |
| 231 | Managerial Level 經理級 | e.g. Sales Manager, Business Development Manager 例如：銷售經理、業務拓展經理 | | | | | |
| 232 | Executive/Supervisory Level 行政/主任級 | e.g. Sales Executive, Customer Services Officer 例如：銷售主任、客戶服務主任 | | | | | |
| 233 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Sales Clerk, Customer Services Clerk 例如：銷售文員、客戶服務員 | | | | | |
| 4. Frontline Cargo Operation 貨物調度、前線操作 | | | | | | | |
| 241 | Managerial Level 經理級 | e.g. Logistics Manager, Seafreight Manager 例如：物流經理、海運經理 | | | | | |
| 242 | Executive/Supervisory Level 行政/主任級 | e.g. Logistics Executive, Seafreight Service Coordinator 例如：物流主任、海運服務主任 | | | | | |
| 243 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Logistics Assistant, Equipment Operator 例如：物流助理、機械操作員 | | | | | |
| 5. Technical/Engineering Support 機械/技術支援 | | | | | | | |
| 251 | Managerial Level 經理級 | e.g. Maintenance Engineer, Engineering Manager 例如：保養工程師、工程經理 | | | | | |
| 252 | Executive/Supervisory Level 行政/主任級 | e.g. Maintenance Officer, Engineer Officer 例如：保養主任、工程主任 | | | | | |
| 253 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Maintenance Trainee, Mechanics 例如：維修見習、機械技工 | | | | | |

Please refer to Appendix A for column explanations. 請參考附錄A內各欄的說明。

| Job Code 職位 編號 | (A) Principal Job 主要職務 (See Appendix B) (參閱附錄 B) | (A1) Examples of Job Titles 職位例子 | (B) No. of Employees as at 1st September 2018 在2018年9月1日 的僱員人數 | (C) No. of Vacancies as at 1st September 2018 在2018年9月1日 的空缺額 | (D) Forecast of No. of Employees as at September 2019 預計在 2019年9月的 僱員人數 | (E) Forecast of No. of Employees as at September 2020 預計在 2020年9月的 僱員人數 | (F) Preferred Level of Education 僱員宜有教育程度 Code 編號 1. Postgraduate Degree 研究生學位 2. First Degree 學士學位 3. Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) 4. Diploma/Certificate 文憑/證書 5. Secondary 4 to 7 中四至中七 6. Secondary 3 or below 中三或以下 |
|---|--|--|---|--|--|--|---|
| | Please enter a zero '0' in the box if no employee/vacancy. 如沒有僱員/空缺, 請在方格內填入 '0'。 | | | | | | |
| LAND TRANSPORT BUSINESS & OPERATION (INCLUDING WAREHOUSE) 陸運業務及有關操作 (包括倉庫) | | | | | | | |
| 1. Business Management, Strategic Planning 業務管理、計劃策略 | | | | | | | |
| 311 | Managerial Level 經理級 | e.g. Business Manager, Operations Controller 例如: 業務經理、營運總監 | | | | | |
| 312 | Executive/Supervisory Level 行政/主任級 | e.g. Business Support Officer, Operations Officer 例如: 業務支援主任、營運主任 | | | | | |
| 313 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Business Support Assistant, Operation Clerk 例如: 業務支援助理、營運文員 | | | | | |
| 2. Fleet Operation and Management 車隊營運及管理 | | | | | | | |
| 321 | Managerial Level 經理級 | e.g. Fleet Manager, Fleet Operations Manager 例如: 車隊經理、車隊營運經理 | | | | | |
| 322 | Executive/Supervisory Level 行政/主任級 | e.g. Operations Support Officer, Fleet Operations Officer 例如: 貨運支援主任、車隊營運主任 | | | | | |
| 323 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Operations Support Assistant, Operations Support Clerk 例如: 貨運支援助理、貨運支援文員 | | | | | |
| 3. Sales & Customer Service 市場銷售及顧客服務 | | | | | | | |
| 331 | Managerial Level 經理級 | e.g. Sales Manager, Business Development Manager 例如: 銷售經理、業務拓展經理 | | | | | |
| 332 | Executive/Supervisory Level 行政/主任級 | e.g. Sales Executive, Customer Services Officer 例如: 銷售主任、客戶服務主任 | | | | | |
| 333 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Sales Clerk, Customer Services Clerk 例如: 銷售文員、客戶服務員 | | | | | |
| 4. Frontline Cargo Operation 貨物調度、前線操作 | | | | | | | |
| 341 | Managerial Level 經理級 | e.g. Logistics Manager, Warehouse Manager 例如: 物流經理、倉務經理 | | | | | |
| 342 | Executive/Supervisory Level 行政/主任級 | e.g. Logistics Executive, Warehouse Supervisor/Coordinator 例如: 物流主任、倉庫主管/主任 | | | | | |
| 343 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Logistics Assistant, Driver 例如: 物流助理、車長 | | | | | |
| 5. Technical/Engineering Support 機械/技術支援 | | | | | | | |
| 351 | Managerial Level 經理級 | e.g. Maintenance Engineer, Engineering Manager 例如: 保養工程師、工程經理 | | | | | |
| 352 | Executive/Supervisory Level 行政/主任級 | e.g. Maintenance Officer, Engineer Officer 例如: 保養主任、工程主任 | | | | | |
| 353 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Maintenance Trainee, Mechanics 例如: 維修見習、機械技工 | | | | | |
| For Official Use | | | | | | | |

(B) Number of Seafarers and staff of other Supporting Services (Such as finance, accounting, Human resources, information technology)

船員及其他行政支援, 如財務會計、人力資源、資訊科技的員工數目

000

PART II
第二部份

1. Please state the number of freight transport staff recruited in the past 12 months by source/origin
請列出過去十二個月內招聘的物流運輸業僱員人數（按來向／來源分類）

| | <u>Managerial Level</u> 經理級 | <u>Executive/ Supervisory Level</u> 行政／主任級 | <u>Clerical/Craftsman/ Operative Level</u> 文員／技工／ 操作工級人員 |
|---|--------------------------------|---|--|
| (a) Recruited from other transport and logistics establishments 受聘者來自物流／乘客運輸業 | | | |
| (b) Recruited from non-transport and logistics establishments 受聘者來自其他行業 | | | |
| (c) Recruited new graduates studied transport and logistics programmes at education/training institutions 受聘者剛畢業於專上院校的物流課程 | | | |
| (d) Others, please specify: 其他，請註明：_____ | | | |

2. Please state the number of freight transport staff left in the Past 12 Months by whereabouts
請列出過去十二個月內離職的物流運輸業僱員人數（按去向分類）

| | <u>Managerial Level</u> 經理級 | <u>Executive/ Supervisory Level</u> 行政／主任級 | <u>Clerical/Craftsman/ Operative Level</u> 文員／技工／ 操作工級人員 |
|---|--------------------------------|---|--|
| (a) Taking up/starting own business in freight/passenger transport related jobs 繼續於物流／乘客運輸業任職／創業 | | | |
| (b) Not taking up freight/passenger transport related jobs (e.g. Taking up/starting own business in non-transport logistics related jobs, emigration, retirement or further studies) 不繼續於物流／乘客運輸業任職（如：於其他行業任職／創業、移民、退休或進修） | | | |
| (c) Unknown 不知道去向 | | | |

3. **Percentage of Employees According to Age Group**
受僱的員工按年齡分佈

Please provide the percentage distribution of Clerical/Craftsman/Operative Level staff according to age group
請提供文員／技工／操作工級人員的年齡分佈百分比

| | |
|----------------------------|---|
| (a) 40 or below 40 歲或以下 | % |
| (b) 41 – 50 41 至 50 歲 | % |
| (c) 51 – 55 51 至 55 歲 | % |
| (d) 56 – 60 56 至 60 歲 | % |
| (e) 61 or above 61 歲或以上 | % |

Total 總數 100%

4. Preferred Competency 僱員宜有能力

Please indicate the Functional Areas in which the Freight Transport staff of your organization will require training in the coming 12 months.
(You may wish to tick “√” more than 1 functional area for each industry.)

請選出未來十二個月內，貴機構需要培訓之物流貨運業僱員所在的職能範疇。（每行業可剔“√”選多於一種職能範疇）

I. Air Freight & Express / Shipping

空運及快遞／海運

| Functional Areas 職能範疇 | Job Level 職級 | Industry 行業 | |
|---|--|--------------------------------|--------------------------|
| | | Air Freight & Express 空運及快遞 | Shipping 海運 |
| (a) Operation Management 營運管理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (b) Planning and Design of Logistics Solutions 物流方案規劃及設計 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (c) Sales, Marketing and Customer Services 營銷、市場推廣及客戶服務 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (d) Cargo Transport and Handling 貨物運輸及處理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (e) Cargo Safety and Security 貨物安全及保安 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (f) E-Logistics 電子物流 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (g) Quality Management 品質管理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (h) Import / Export Documentation and Procedures 出入口文件處理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (i) Insurance and Legal Matters 保險及法律事務 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (j) Occupational Safety & Health 職業安全及健康 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |

II. Land Transport and Distribution / Terminals, Warehouse, and Logistics Centre/ Supporting and Ancillary Services
 陸路運輸及分發／貨運站、倉庫及物流中心／支援及輔助服務

| Functional Areas 職能範疇 | Job Level 職級 | Industry 行業 | | |
|--|--|---|---|--|
| | | Land Transport and Distribution 陸路運輸及 分發 | Terminals, Warehouse, and Logistics Centre 貨運站、倉庫及 物流中心 | Supporting and Ancillary Services 支援及輔助 服務 |
| (a) Operation Management 營運管理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (b) Planning and Design of Logistics Solutions 物流方案規劃及設計 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (c) Sales, Marketing and Customer Services 營銷、市場推廣及客戶服務 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (d) Cargo Transport and Handling 貨物運輸及處理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (e) Cargo Safety and Security 貨物安全及保安 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (f) E-Logistics 電子物流 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (g) Quality Management 品質管理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (h) Import / Export Documentation 出入口文件處理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (i) Insurance, Legal Matters & Compliance 保險、法律事務及遵守法規 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (j) Environmental Protection 環境保護 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

End of questionnaire. Thank you for your co-operation.
問卷完，多謝合作。

The 2018 Manpower Survey of the Transport and Logistics Industry
運輸及物流業二零一八年人力調查
Explanatory Notes
附註

1. Definition of the Jobs Engaged in Transport and Logistics
從事運輸及物流的職位定義

- (a) Jobs in **‘Air Transport Business & Operation’** (excluding warehouse and depot operation) refer to jobs mainly engaged in air cargo operation.
「空運業務及有關操作」(不包括倉庫及碼頭)職位是指主要從事處理空運貨物的營運。
- (b) Jobs in **‘Sea Transport Business & Operation’** (excluding warehouse operation) refer to jobs mainly engaged in sea cargo logistics operation.
「海運業務及有關操作」(不包括倉庫)職位是指主要從事處理海運物流的營運。
- (c) Jobs in **‘Land Transport Business & Operation’** (including Warehouse) refer to jobs mainly engaged in land cargo operation.
「陸運業務及有關操作」(包括倉庫)職位是指主要從事處理陸上物流的營運。

Remarks:

If the employee in your establishment is taking up jobs in more than one transport business and operation, please classify according to the heavier responsible area.
如 貴機構的僱員有同時兼顧兩個或以上的業務範疇，則按其負責業務範疇較重的歸類。

2. Principal Jobs - Column ‘A’
主要職務 —— ‘A’ 欄

- (a) Please go through column ‘A’ and mark those principal jobs applicable to your establishment. For detailed job descriptions, please refer to Appendix B.
請瀏覽 ‘A’ 欄，選取適用於 貴機構的主要職務。有關詳細的工作說明，請參閱附錄 B。
- (b) All jobs for scope of other supporting services not directly involved in the business, operation and technical services (such as finance, accounting, human resources, information technology), please fill in the number of employees in Question (B) of part I.
公司業務、營運及技術支援以外所有一般行政支援員工，如財務會計、人力資源、資訊科技範疇的僱員人數請填報於第一部份問題(B)之方格內。

3. Number of Employees as at 1.9.2018 - Column ‘B’
在 2018 年 9 月 1 日的僱員人數 —— ‘B’ 欄

For each principal job, please fill in the total number of employees as at 1.9.2018.
請填寫 貴機構於 2018 年 9 月 1 日僱用的每個主要職務的僱員總數。

‘Employees’ refer to those working full-time (i.e. at least consecutive 4 weeks a month, and not less than 18 hours in each week) and receiving regular pay from your firm. These include proprietors and partners working full-time for company but exclude those working part-time. This definition also applies to ‘employee(s)’ appearing in other parts of the questionnaire.

「僱員」指於 貴機構內全職工作（即每月工作最少連續四週、每週不少於十八小時）及定期支取薪金的人士，其中包括在公司內全職工作的東主及合夥人，但不包括兼職僱員。調查表他處出現的「僱員」一詞，定義亦同。

4. Number of Vacancies as at 1.9.2018 - Column 'C'
在 2018 年 9 月 1 日的空缺數目 —— 'C' 欄

Please fill in the number of existing vacancies as at 1.9.2018. 'Existing Vacancies' refer to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel as at 1.9.2018.

請填上在 2018 年 9 月 1 日每一主要職務的空缺額。「空缺額」是指該職位於當日仍懸空，須立刻填補，而正積極招聘人員填補。

5. Forecast of No. of Employees as at September 2019 - Column 'D'
預計在 2019 年 9 月的僱員人數 —— 'D' 欄

The forecast number of employees means the number of employees you will be employing as at September 2019. The number given could be less than existing employees if a contraction is expected. 指貴公司在 2019 年 9 月的預計僱員人數。如估計業務可能收縮，此欄所填人數可能少於現有僱員人數。

6. Forecast of No. of Employees as at September 2020 - Column 'E'
預計在 2020 年 9 月的僱員人數 —— 'E' 欄

The forecast number of employees means the number of employees you will be employing as at September 2020. The number given could be less than existing employees if a contraction is expected. 指貴公司在 2020 年 9 月的預計僱員人數。如估計業務可能收縮，此欄所填人數可能少於現有僱員人數。

7. Preferred Level of Education - Column 'F'
僱員宜有教育程度 —— 'F' 欄

Please enter the code showing basic education which an employee should have.
請按適當類別編號，將僱員宜有的基本教育程度填入 'F' 欄內。

Definition of Preferred Level of Education:
宜有教育程度的定義：

- ◆ “Postgraduate Degree” refers to higher degrees (e.g. master degrees) offered by local or non-local education institutions, or equivalent.
「研究生學位」是指本地或非本地教育機構提供的高等學位（如碩士學位），或同等教育程度。
- ◆ “First Degree” refers to first degrees offered by local or non-local education institutions, or equivalent.
「學士學位」是指本地或非本地教育機構提供的學士學位，或同等教育程度。
- ◆ “Sub-degree” refers to Associate Degrees, Higher Diplomas, Professional Diplomas, Higher Certificates, Endorsement Certificates, Associateship or equivalent programmes offered by local or non-local education institutions.
「副學位」是指本地或非本地教育機構提供的副學士、高級文憑、專業文憑、高級證書、增修證書、院士銜或同等課程。
- ◆ “Diploma/Certificate” refers to technical and vocational education programmes including Diploma/Certificate courses, Diploma of Foundation Studies, Diploma of Vocational Education and programmes at the craft level, or equivalent.
「文憑／證書」是指技術及職業教育課程之文憑／證書、基礎課程文憑、職專文憑及技工程度的課程，或同等教育程度。
- ◆ “Secondary 4 to 7” refers to Secondary 4-7, covering the education programmes in relation to the Hong Kong Certificate of Education Examination (HKCEE), the Hong Kong Diploma of Secondary Education (HKDSE) Examination, Diploma Yi Ji, or equivalent.
「中四至中七」是指中四至中七（包括與香港中學會考、香港中學文憑考試、毅進文憑等相關的教育課程）或同等教育程度。
- ◆ “Secondary 3 or below” refers to Secondary 3 or below, or equivalent.
「中三或以下」是指中三或以下，或同等教育程度。

**Job Descriptions for Principal Jobs in the
Transport and Logistics Industry**
運輸及物流業
主要職務工作說明

Descriptions of Job Level
職級簡介

| Job Level 職級 | Description 簡介 |
|--|--|
| Managerial Level 經理級人員 | Head (deputy included) of a department or section of an establishment responsible for getting jobs done of the prescribed area of responsibilities by sub-ordinates according to the company policy, goals and objectives. 部門主管(包括副主管), 根據公司政策、目的及目標, 及通過屬下員工完成、達到有關職責範圍。 |
| Executive/Supervisory Level 行政 / 主任級人員 | Mainly assist the managerial level in carrying out the prescribed area of responsibilities. Usually are involved in supervision of the work of the junior level on the spot. 主要協助經理級人員去完成、達到有關職責範圍。通常於辦公室或操作場地督導初級員工的工作。 |
| Clerical/Craftsman/Operative Level 文員 / 技工 / 操作工級人員 | Work under supervision and characterised by office job duties or physical job duties with technical requirements, or to receive/handle/distribute document/cargo. 通常於督導下進行辦公室文書、操作場地技術工作或接收、處理、運送文件 / 貨物。 |

Descriptions of Scope and Area of Responsibilities

範疇及職責範圍簡介

1. Business Management, Strategic Planning

業務管理、計劃策略

Area of Responsibilities

職責範圍

The upper level of an establishment in charge of the formulation of strategies, setting of guidelines, targets and steering of performance of the overall business of the establishment. Specifically:

公司內最高管理層，負責制訂公司策略、方針、目標、監控公司業務進度。具體職務有：

- Business management - Assess the business potential and resources required for developing the business. Ensure the establishment, its business partners and contractors work together and in line with the company goal. Formulate performance indices for the establishment and monitor the progress of the establishment in reaching the target; adjust the policy/strategy if necessary.
業務管理 — 評估業務發展潛力，調撥資源開拓公司業務，確保公司內部及以外的其合作伙伴共同達致制定目標。制定評估公司表現的方式，監察公司每項政策／策略推行進度，並適時作出修改。
- Strategy planning - Establish the local/regional/global operating strategy (such as strategic alliance) for the establishment. Design and develop strategy for logistics solutions that can be offered by the establishment.
計劃策略 — 負責制定公司在本地、所屬地區以至全球的營運策略（如：戰略性合作伙伴），設計及開發公司策略性物流方案。
- Technology & technique - Assess the current technology and technique in operating the establishment and set policy for introduction/enhancement of new(er) technology and technique.
科技及技術 — 評估公司現有科技及技術水平，制定政策引進及改良公司的科技及技術。

Descriptions of Scope and Area of Responsibilities (Continued)

範疇及職責範圍簡介(續)

2. Fleet Operation and Management

機隊、航隊、車隊營運及管理

Area of Responsibilities

職責範圍

The operating arm of an establishment in charge of maximising the asset/fleet of the establishment. Specifically:

公司內負責營運公司資產／航隊。具體職務有：

- Fleet management - Manage a fleet to offer a regular/scheduled/liner or irregular/chartered/tramp service; and design/develop the routing pattern according to senior management's decision. Decide on the timing and (sub-)contractors for maintaining the fleet.
航隊管理 — 根據管理層制定的營運策略編制航線及管理航線的整體服務。
- Fleet acquisition & utilisation - Order/purchase/charter-in/ leasing arrangement for the fleet. Also deal with sales/ charter-out/leasing out/disposal/suspension/laid up of the fleet when applicable. Control/allocate space of the fleet where applicable.
航隊調度及配置 — 適當調度航隊，適時為航隊準備配置／保養方案。
- Contractors & suppliers - Select and supervise the services provided by (sub-)contractors & suppliers (such as through tendering mechanisms) for maintaining the fleet.
服務招標及外判 — 擬訂以投標形式甄選服務承包商及供應商的細節，並監管其服務表現。

3. Sales & Customer Service

市場銷售及顧客服務

Area of Responsibilities

職責範圍

The operating arm of an establishment in charge of finding out needs of customers, securing the business and serving customers. Specifically:

公司內負責發掘客戶需要，跟進客戶要求並提供服務，以拓展公司業務。具體職務有：

- Sales & marketing - Assess the market/customers demand/ needs and competition environment; recommend and implement sales target, customer relationship strategy, marketing strategy and pricing strategy etc.
銷售及市場拓展 — 分析市場／客戶的需要及市場競爭環境，建議及推行銷售目標、客戶服務策略、市場策略及定價策略等。
- Customer service - The business process from initial enquiry, booking, baggage services to arrangement of shipments / tickets, and the related procedure and documentation.
客戶服務 — 處理詢問、預訂、行李服務及運送、票務有關手續及所需文件。

Descriptions of Scope and Area of Responsibilities (Continued) 範疇及職責範圍簡介(續)

4. Frontline Cargo / Passenger Operation 貨物調度／乘客運輸、前線操作

Area of Responsibilities 職責範圍

The operating arm of an establishment in charge of arranging cargo shipments/passenger transportation according to the needs of customers, specifically:

公司內負責按客戶需求安排有關貨運。具體職務有：

- Space - Schedule cargo/fleet movements according to space/traffic allocated/conditions.
艙／客位調度 — 按艙位／交通分配，安排貨運／客運日期／班次。
- Logistics arrangement - Operation processes in receiving, storing, distributing, releasing of cargoes/tickets and related processes where applicable.
流程安排 — 處理貨物／票務交收、存倉、分發、運送 的一切事宜及有關手續。
- Contractors & suppliers - Select and supervise the services provided by (sub-)contractors & suppliers for cargo operation/passenger service.
服務招標及外判 — 甄選及監管貨運／客運服務承包商及供應商。
- Safety & security - Ensure the operation is in compliance with mandatory and internal/external requirements.
安全及保安 — 確保貨運過程在符合有關法例與內／外部指引的情況下運作。

5. Technical/Engineering Support 機械／技術支援

Area of Responsibilities 職責範圍

The operating arm of an establishment in charge of technical service. Specifically:

公司內負責提供技術支援之單位。具體職務有：

- Machinery & equipment - Establish technical indicators and management system for the operation of machinery and equipment.
機械及設備 — 建立使用機械及有關設備的技術指標及管理制度。
- Contractors & suppliers - Select and supervise the services provided by (sub-)contractors & suppliers for machinery and equipment.
服務招標及外判 — 甄選及監管機械及設備承包商及供應商。
- Safety & security - Ensure the operation of machinery and equipment is in compliance with mandatory and inhouse requirements.
安全及保安 — 確保機械及設備符合有關法例與內部指引的情況下運作。

**CONFIDENTIAL**

WHEN ENTERED WITH DATA

填入數據後即成

機密文件**VOCATIONAL TRAINING COUNCIL****職業訓練局****THE 2018 MANPOWER SURVEY OF THE TRANSPORT AND LOGISTICS INDUSTRY****運輸及物流業 2018 年人力調查**

The 2018 Manpower Survey of the Transport and Logistics (TL) Industry aims at collecting manpower information of the sector concerned for formulating recommendations on future manpower training. Please kindly provide the information of your establishment as at **1st September 2018** by answering the questionnaire. Thank you.

運輸及物流業2018年人力調查旨在蒐集業內人力情況的最新資料，並按此為未來人力訓練制訂適當建議。懇請貴機構根據**2018年9月1日**的人力情況填寫此問卷。多謝合作。

Establishment Information**機構資料**

NAME OF COMPANY: _____

公司名稱

ADDRESS: _____

地址

PRINCIPAL LINE OF BUSINESS:

主要業務

Air Transport (Passenger/Freight)

空運運輸(乘客/物流)

 Others (Please Specify) 其他 (請註明): _____

TOTAL NO. OF PERSONS ENGAGED: _____

僱員總人數

(For official use)

Industry Code _____

Details of Contact Person***聯絡人資料***

NAME OF PERSON TO CONTACT: _____

聯絡人姓名

POSITION: _____

職位

TEL. NO.: _____ - _____

電話

FAX NO.: _____

圖文傳真

E-MAIL: _____

電郵

* The information provided will be used for the purpose of this and subsequent manpower surveys.
所提供資料將用作是次及日後人力調查之用。

Part I – Manpower Information
第一部份 – 人力情況

Survey Reference Date: 1st September 2018
統計日期：2018年9月1日

Please complete columns 'B' to 'F' of the questionnaire according to the list of principal jobs by referring to Appendix B for job description of individual job.

請根據列表中的主要職務，並參考附錄B有關各種職務的工作說明來填寫表內各欄 'B' 至 'F'。

(A) Principal Jobs 主要職務

| Please refer to Appendix A for column explanations. 請參考附錄A內各欄的說明。 | | | | | | |
|---|--|---|--|--|--|---|
| (A) Principal Job 主要職務 (See Appendix B) (參閱附錄 B) | (A1) Examples of Job Titles 職位例子 | (B) No. of Employees as at 1st September 2018 在2018年9月1日 的僱員人數 | (C) No. of Vacancies as at 1st September 2018 在2018年9月1日 的空缺額 | (D) Forecast of No. of Employees as at September 2019 預計在 2019年9月的 僱員人數 | (E) Forecast of No. of Employees as at September 2020 預計在 2020年9月的 僱員人數 | (F) Preferred Level of Education 僱員宜有教育程度 Code 編號 1. Postgraduate Degree 研究生學位 2. First Degree 學士學位 3. Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) 4. Diploma/Certificate 文憑/證書 5. Secondary 4 to 7 中四至中七 6. Secondary 3 or below 中三或以下 |
| e.g. Job Title A (3 employees and 2 vacancies) 例子: 職位甲 (3名僱員及2個空缺) | | 3 | 2 | 5 | 4 | 3 |
| AVIATION SERVICE (INCLUDING HELICOPTER SERVICE) 航空服務 (包括直升機客運) | | | | | | |
| 1. Business Management, Strategic Planning 業務管理、計劃策略 | | | | | | |
| 411 Managerial Level 經理級 | e.g. Business Manager, Operations Controller 例如：業務經理、營運總監 | | | | | |
| 412 Executive/Supervisory Level 行政/主任級 | e.g. Business Support Supervisor, Operations Supervisor 例如：業務支援主任、營運主任 | | | | | |
| 413 Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Business Support Assistant, Operation Officer 例如：業務支援助理、營運人員 | | | | | |
| 2. Fleet Operation and Management 機隊營運及管理 | | | | | | |
| 421 Managerial Level 經理級 | e.g. Fleet Manager, Fleet Operations Manager 例如：機隊經理、機隊營運經理 | | | | | |
| 422 Executive/Supervisory Level 行政/主任級 | e.g. Operations Support Supervisor, Fleet Operations Supervisor 例如：客運支援主任、機隊營運主任 | | | | | |
| 423 Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Operations Support Assistant, Operations Support Officer 例如：客運支援助理、客運支援人員 | | | | | |
| 3. Sales & Customer Service 市場銷售及顧客服務 | | | | | | |
| 431 Managerial Level 經理級 | e.g. Sales Manager, Business Development Manager 例如：銷售經理、業務拓展經理 | | | | | |
| 432 Executive/Supervisory Level 行政/主任級 | e.g. Sales Executive, Customer Services Supervisor 例如：銷售主任、客戶服務主任 | | | | | |
| 433 Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Sales Officer, Customer Services Officer 例如：銷售員、客戶服務員 | | | | | |
| 4. Frontline Passenger Operation 乘客運輸、前線操作 | | | | | | |
| 441 Managerial Level 經理級 | e.g. Crew Manager, Pilot 例如：機組經理、機長 | | | | | |
| 442 Executive/Supervisory Level 行政/主任級 | e.g. Flight Purser, Passenger Services Supervisor 例如：機艙事務長、客運服務主任 | | | | | |
| 443 Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Flight Attendant/Ground Handling Staff, Airport Services Support Assistant 例如：機艙服務員/地勤人員、停機坪助理 | | | | | |
| 5. Technical/Engineering Support 機械/技術支援 | | | | | | |
| 451 Managerial Level 經理級 | e.g. Aircraft Maintenance Engineer, Engineering Manager 例如：飛機保養工程師、工程經理 | | | | | |
| 452 Executive/Supervisory Level 行政/主任級 | e.g. Maintenance Supervisor, Engineer Supervisor 例如：保養主任、工程主任 | | | | | |
| 453 Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Maintenance Trainee, Mechanics 例如：維修見習、機械技工 | | | | | |

Please refer to Appendix A for column explanations. 請參考附錄A內各欄的說明。

| Job Code 職位 編號 | (A) Principal Job 主要職務 (See Appendix B) (參閱附錄 B) | (A1) Examples of Job Titles 職位例子 | (B) No. of Employees as at 1st September 2018 在2018年9月1日 的僱員人數 | (C) No. of Vacancies as at 1st September 2018 在2018年9月1日 的空缺額 | (D) Forecast of No. of Employees as at September 2019 預計在 2019年9月的 僱員人數 | (E) Forecast of No. of Employees as at September 2020 預計在 2020年9月的 僱員人數 | (F) Preferred Level of Education 僱員宜有教育程度 Code 編號 1. Postgraduate Degree 研究生學位 2. First Degree 學士學位 3. Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) 4. Diploma/Certificate 文憑/證書 5. Secondary 4 to 7 中四至中七 6. Secondary 3 or below 中三或以下 |
|--|--|--|---|--|--|--|---|
| | | | | Please enter a zero '0' in the box if no employee/vacancy. 如沒有僱員/空缺, 請在方格內填入 '0'。 | | | |
| AIR TRANSPORT BUSINESS & OPERATION (EXCLUDING WAREHOUSE AND DEPOT) 空運業務及有關操作 (不包括倉庫及碼頭) | | | | | | | |
| 1. Business Management, Strategic Planning 業務管理、計劃策略 | | | | | | | |
| 111 | Managerial Level 經理級 | e.g. Business Manager, Operations Controller 例如: 業務經理、營運總監 | | | | | |
| 112 | Executive/Supervisory Level 行政/主任級 | e.g. Business Support Supervisor, Operations Supervisor 例如: 業務支援主任、營運主任 | | | | | |
| 113 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Business Support Assistant, Operation Officer 例如: 業務支援助理、營運人員 | | | | | |
| 2. Fleet Operation and Management 機隊營運及管理 | | | | | | | |
| 121 | Managerial Level 經理級 | e.g. Cargo Services Manager, Airport Operations Manager 例如: 空運服務經理、機場營運經理 | | | | | |
| 122 | Executive/Supervisory Level 行政/主任級 | e.g. Cargo Services Supervisor, Flight Operations Support Supervisor 例如: 空運服務主任、航運支援主任 | | | | | |
| 123 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Cargo Services Officer, Flight Operations Support Assistant 例如: 空運服務人員、航運支援助理 | | | | | |
| 3. Sales & Customer Service 市場銷售及顧客服務 | | | | | | | |
| 131 | Managerial Level 經理級 | e.g. Sales Manager, Business Development Manager 例如: 銷售經理、業務拓展經理 | | | | | |
| 132 | Executive/Supervisory Level 行政/主任級 | e.g. Sales Executive, Customer Services Supervisor 例如: 銷售主任、客戶服務主任 | | | | | |
| 133 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Sales Officer, Customer Services Officer 例如: 銷售員、客戶服務員 | | | | | |
| 4. Frontline Cargo Operation 貨物調度、前線操作 | | | | | | | |
| 141 | Managerial Level 經理級 | e.g. Logistics Manager, Pilot 例如: 物流經理、機長 | | | | | |
| 142 | Executive/Supervisory Level 行政/主任級 | e.g. Logistics Executive, Aircraft Service Coordinator 例如: 物流主任、空運服務主任 | | | | | |
| 143 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Airport Services Support Assistant, Ground Handling Services Support 例如: 停機坪助理、貨運裝卸員 | | | | | |
| 5. Technical/Engineering Support 機械/技術支援 | | | | | | | |
| 151 | Managerial Level 經理級 | e.g. Aircraft Maintenance Engineer, Engineering Manager 例如: 飛機保養工程師、工程經理 | | | | | |
| 152 | Executive/Supervisory Level 行政/主任級 | e.g. Maintenance Supervisor, Engineer Supervisor 例如: 保養主任、工程主任 | | | | | |
| 153 | Clerical/Craftsman/Operative Level 文員/技工/操作工級人員 | e.g. Maintenance Trainee, Mechanics 例如: 維修見習、機械技工 | | | | | |
| For Official Use | | | | | | | |

(B) Number of staff of other Supporting Services (Such as finance, accounting, Human resources, information technology)

其他行政支援, 如財務會計、人力資源、資訊科技的員工數目

000

PART II
第二部份

1. Please state the number of passenger transport / freight transport staff recruited in the past 12 months by source/origin
請列出過去十二個月內招聘的乘客運輸／物流運輸業僱員人數（按來向／來源分類）

| | <u>Managerial Level</u> 經理級 | <u>Executive/ Supervisory Level</u> 行政／主任級 | <u>Clerical/Craftsman/ Operative Level</u> 文員／技工／ 操作工級人員 |
|---|--------------------------------|---|--|
| (a) Recruited from other transport and logistics establishments 受聘者來自物流／乘客運輸業 | | | |
| (b) Recruited from non-transport and logistics establishments 受聘者來自其他行業 | | | |
| (c) Recruited new graduates studied transport and logistics programmes at education/training institutions 受聘者剛畢業於專上院校的物流課程 | | | |
| (d) Others, please specify: 其他，請註明：_____ | | | |

2. Please state the number of passenger transport / freight transport staff left in the past 12 months by whereabouts
請列出過去十二個月內離職的乘客運輸／物流運輸業僱員人數（按去向分類）

| | <u>Managerial Level</u> 經理級 | <u>Executive/ Supervisory Level</u> 行政／主任級 | <u>Clerical/Craftsman/ Operative Level</u> 文員／技工／ 操作工級人員 |
|---|--------------------------------|---|--|
| (a) Taking up/starting own business in freight/passenger transport related jobs 繼續於物流／乘客運輸業任職／創業 | | | |
| (b) Not taking up freight/passenger transport related jobs (e.g. Taking up/starting own business in non-transport logistics related jobs, emigration, retirement or further studies) 不繼續於物流／乘客運輸業任職（如：於其他行業任職／創業、移民、退休或進修） | | | |
| (c) Unknown 不知道去向 | | | |

3. **Percentage of Employees According to Age Group**
受僱的員工按年齡分佈

Please provide the percentage distribution of Clerical/Craftsman/Operative Level staff according to age group
請提供文員／技工／操作工級人員的年齡分佈百分比

| | | |
|----------------------------|--|---|
| (a) 40 or below 40 歲或以下 | | % |
| (b) 41 – 50 41 至 50 歲 | | % |
| (c) 51 – 55 51 至 55 歲 | | % |
| (d) 56 – 60 56 至 60 歲 | | % |
| (e) 61 or above 61 歲或以上 | | % |

Total 總數

100%

4. **Preferred Competency**
僱員宜有能力

- (a) Please indicate the training (either internal or external) needed for **Passenger Transport employees** in the coming 12 months (You may wish to tick “√” more than 1 type of skill for each job level)
請選出在未來十二個月內，貴機構需要給**乘客運輸業僱員**的培訓（包括內部及外間）（每職級可剔“√”選多於一種技能類別）

| Training needed for Passenger Transport employees 乘客運輸業僱員 所需培訓 | Managerial Level 經理級 | Executive/ Supervisory Level 行政／主任級 | Clerical/Craftsman/ Operative Level 文員／技工／ 操作工級人員 |
|--|----------------------------|---|--|
| I. Trade Specific Skills 業內專業技能 | | | |
| (a) Managerial / Supervisory / Coaching Skills / Strategic Management 管理／督導／訓練技巧／策略管理 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (b) Customer Relationship / Complaints Handling 客戶關係／投訴處理 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (c) Sales and Marketing 銷售及市務推廣 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (d) Merchandising and Purchasing 採購 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (e) Financing and Accounting 財務及會計 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (f) Operating Special Vehicles / Equipment 操作特別用途運輸／工具 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (g) Law & Regulatory of Transport 交通法律和法規 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| II. Generic & Other Skills 一般及其他技巧 | | | |
| (a) Crowd Control 人羣控制 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (b) First Aid 急救 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (c) Handling of Emergency Incidents 特發事情應變 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (d) Repair and Maintenance 機械維修及保養 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (e) Others (Please Specify) 其他（請註明）_____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

(b) Please indicate the Functional Areas in which the **Freight Transport staff** of your organization will require training in the coming 12 months. (You may wish to tick “✓” more than 1 functional area for each industry.)

請選出未來十二個月內，貴機構需要培訓之**物流貨運業僱員**所在的職能範疇。（每行業可剔“✓”選多於一種職能範疇）

I. Air Freight & Express / Shipping

空運及快遞／海運

| Require training of Freight Transport staff 物流貨運業僱員 所需培訓 | Job Level 職級 | Industry 行業 | |
|--|--|--------------------------------|--------------------------|
| | | Air Freight & Express 空運及快遞 | Shipping 海運 |
| Functional Areas 職能範疇 | | | |
| (a) Operation Management 營運管理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (b) Planning and Design of Logistics Solutions 物流方案規劃及設計 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (c) Sales, Marketing and Customer Services 營銷、市場推廣及客戶服務 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (d) Cargo Transport and Handling 貨物運輸及處理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (e) Cargo Safety and Security 貨物安全及保安 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (f) E-Logistics 電子物流 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (g) Quality Management 品質管理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (h) Import / Export Documentation and Procedures 出入口文件處理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (i) Insurance and Legal Matters 保險及法律事務 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |
| (j) Occupational Safety & Health 職業安全及健康 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> |

II. Land Transport and Distribution / Terminals, Warehouse, and Logistics Centre/ Supporting and Ancillary Services
陸路運輸及分發／貨運站、倉庫及物流中心／支援及輔助服務

| Require training of Freight Transport staff 物流貨運業僱員 所需培訓 | <u>Job Level</u> 職級 | <u>Industry</u> 行業 | | |
|--|--|---|--|---|
| | | <u>Land Transport and Distribution</u> 陸路運輸及分發 | <u>Terminals, Warehouse, and Logistics Centre</u> 貨運站、倉庫及物流中心 | <u>Supporting and Ancillary Services</u> 支援及輔助服務 |
| <u>Functional Areas</u> 職能範疇 | | | | |
| (a) Operation Management 營運管理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (b) Planning and Design of Logistics Solutions 物流方案規劃及設計 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (c) Sales, Marketing and Customer Services 營銷、市場推廣及客戶服務 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (d) Cargo Transport and Handling 貨物運輸及處理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (e) Cargo Safety and Security 貨物安全及保安 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (f) E-Logistics 電子物流 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (g) Quality Management 品質管理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (h) Import / Export Documentation 出入口文件處理 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (i) Insurance, Legal Matters & Compliance 保險、法律事務及遵守法規 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (j) Environmental Protection 環境保護 | Managerial Level 經理級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Executive/ Supervisory Level 行政／主任級 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Clerical/Craftsman/Operative Level 文員／技工／操作工級人員 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

End of questionnaire. Thank you for your co-operation.
問卷完，多謝合作。

The 2018 Manpower Survey of the Transport and Logistics Industry
運輸及物流業二零一八年人力調查

Explanatory Notes

附註

1. Definition of the Jobs Engaged in Transport and Logistics

從事運輸及物流的職位定義

(a) Jobs in '**Aviation Service**' (including helicopter service) refer to jobs mainly engaged in air passenger operation.

「航空服務」(包括直升機客運)職位是指主要從事處理航空客務的營運。

(b) Jobs in '**Air Transport Business & Operation**' (excluding warehouse and depot operation) refer to jobs mainly engaged in air cargo operation.

「空運業務及有關操作」(不包括倉庫及碼頭)職位是指主要從事處理空運貨物的營運。

Remarks:

If the employee in your establishment is taking up jobs in more than one transport business and operation, please classify according to the heavier responsible area.

如 貴機構的僱員有同時兼顧兩個或以上的業務範疇，則按其負責業務範疇較重的歸類。

2. Principal Jobs - Column 'A'

主要職務 —— 'A' 欄

(a) Please go through column 'A' and mark those principal jobs applicable to your establishment. For detailed job descriptions, please refer to Appendix B.

請瀏覽 'A' 欄，選取適用於 貴機構的主要職務。有關詳細的工作說明，請參閱附錄 B。

(b) All jobs for scope of other supporting services not directly involved in the business, operation and technical services (such as finance, accounting, human resources, information technology), please fill in the number of employees in Question (B) of part I.

公司業務、營運及技術支援以外所有一般行政支援員工，如財務會計、人力資源、資訊科技範疇的僱員人數請填報於第一部份問題(B)之方格內。

3. Number of Employees as at 1.9.2018 - Column 'B'

在 2018 年 9 月 1 日的僱員人數 —— 'B' 欄

For each principal job, please fill in the total number of employees as at 1.9.2018.

請填寫 貴機構於 2018 年 9 月 1 日僱用的每個主要職務的僱員總數。

'Employees' refer to those working full-time (i.e. at least consecutive 4 weeks a month, and not less than 18 hours in each week) and receiving regular pay from your firm. These include proprietors and partners working full-time for company but exclude those working part-time. This definition also applies to 'employee(s)' appearing in other parts of the questionnaire.

「僱員」指於 貴機構內全職工作(即每月工作最少連續四週、每週不少於十八小時)及定期支取薪金的人士，其中包括在公司內全職工作的東主及合夥人，但不包括兼職僱員。調查表他處出現的「僱員」一詞，定義亦同。

4. Number of Vacancies as at 1.9.2018 - Column 'C'
在 2018 年 9 月 1 日的空缺數目 —— 'C' 欄

Please fill in the number of existing vacancies as at 1.9.2018. 'Existing Vacancies' refer to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel as at 1.9.2018.

請填上在 2018 年 9 月 1 日每一主要職務的空缺額。「空缺額」是指該職位於當日仍懸空，須立刻填補，而正積極招聘人員填補。

5. Forecast of No. of Employees as at September 2019 - Column 'D'
預計在 2019 年 9 月的僱員人數 —— 'D' 欄

The forecast number of employees means the number of employees you will be employing as at September 2019. The number given could be less than existing employees if a contraction is expected. 指貴公司在 2019 年 9 月的預計僱員人數。如估計業務可能收縮，此欄所填人數可能少於現有僱員人數。

6. Forecast of No. of Employees as at September 2020 - Column 'E'
預計在 2020 年 9 月的僱員人數 —— 'E' 欄

The forecast number of employees means the number of employees you will be employing as at September 2020. The number given could be less than existing employees if a contraction is expected. 指貴公司在 2020 年 9 月的預計僱員人數。如估計業務可能收縮，此欄所填人數可能少於現有僱員人數。

7. Preferred Level of Education - Column 'F'
僱員宜有教育程度 —— 'F' 欄

Please enter the code showing basic education which an employee should have.
請按適當類別編號，將僱員宜有的基本教育程度填入 'F' 欄內。

Definition of Preferred Level of Education:
宜有教育程度的定義：

- ◆ “Postgraduate Degree” refers to higher degrees (e.g. master degrees) offered by local or non-local education institutions, or equivalent.
「研究生學位」是指本地或非本地教育機構提供的高等學位（如碩士學位），或同等教育程度。
- ◆ “First Degree” refers to first degrees offered by local or non-local education institutions, or equivalent.
「學士學位」是指本地或非本地教育機構提供的學士學位，或同等教育程度。
- ◆ “Sub-degree” refers to Associate Degrees, Higher Diplomas, Professional Diplomas, Higher Certificates, Endorsement Certificates, Associateship or equivalent programmes offered by local or non-local education institutions.
「副學位」是指本地或非本地教育機構提供的副學士、高級文憑、專業文憑、高級證書、增修證書、院士銜或同等課程。
- ◆ “Diploma/Certificate” refers to technical and vocational education programmes including Diploma/Certificate courses, Diploma of Foundation Studies, Diploma of Vocational Education and programmes at the craft level, or equivalent.
「文憑／證書」是指技術及職業教育課程之文憑／證書、基礎課程文憑、職專文憑及技工程度的課程，或同等教育程度。
- ◆ “Secondary 4 to 7” refers to Secondary 4-7, covering the education programmes in relation to the Hong Kong Certificate of Education Examination (HKCEE), the Hong Kong Diploma of Secondary Education (HKDSE) Examination, Diploma Yi Ji, or equivalent.
「中四至中七」是指中四至中七（包括與香港中學會考、香港中學文憑考試、毅進文憑等相關的教育課程）或同等教育程度。
- ◆ “Secondary 3 or below” refers to Secondary 3 or below, or equivalent.
「中三或以下」是指中三或以下，或同等教育程度。

**Job Descriptions for Principal Jobs in the
Transport and Logistics Industry**
運輸及物流業
主要職務工作說明

Descriptions of Job Level
職級簡介

| Job Level 職級 | Description 簡介 |
|--|--|
| Managerial Level 經理級人員 | Head (deputy included) of a department or section of an establishment responsible for getting jobs done of the prescribed area of responsibilities by sub-ordinates according to the company policy, goals and objectives. 部門主管(包括副主管), 根據公司政策、目的及目標, 及通過屬下員工完成、達到有關職責範圍。 |
| Executive/Supervisory Level 行政 / 主任級人員 | Mainly assist the managerial level in carrying out the prescribed area of responsibilities. Usually are involved in supervision of the work of the junior level on the spot. 主要協助經理級人員去完成、達到有關職責範圍。通常於辦公室或操作場地督導初級員工的工作。 |
| Clerical/Craftsman/Operative Level 文員 / 技工 / 操作工級人員 | Work under supervision and characterised by office job duties or physical job duties with technical requirements, or to receive/handle/distribute document/cargo. 通常於督導下進行辦公室文書、操作場地技術工作或接收、處理、運送文件 / 貨物。 |

Descriptions of Scope and Area of Responsibilities

範疇及職責範圍簡介

1. Business Management, Strategic Planning

業務管理、計劃策略

Area of Responsibilities

職責範圍

The upper level of an establishment in charge of the formulation of strategies, setting of guidelines, targets and steering of performance of the overall business of the establishment. Specifically:

公司內最高管理層，負責制訂公司策略、方針、目標、監控公司業務進度。具體職務有：

- Business management - Assess the business potential and resources required for developing the business. Ensure the establishment, its business partners and contractors work together and in line with the company goal. Formulate performance indices for the establishment and monitor the progress of the establishment in reaching the target; adjust the policy/strategy if necessary.
業務管理 — 評估業務發展潛力，調撥資源開拓公司業務，確保公司內部及以外的其合作伙伴共同達致制定目標。制定評估公司表現的方式，監察公司每項政策／策略推行進度，並適時作出修改。
- Strategy planning - Establish the local/regional/global operating strategy (such as strategic alliance) for the establishment. Design and develop strategy for logistics solutions that can be offered by the establishment.
計劃策略 — 負責制定公司在本地、所屬地區以至全球的營運策略（如：戰略性合作伙伴），設計及開發公司策略性物流方案。
- Technology & technique - Assess the current technology and technique in operating the establishment and set policy for introduction/enhancement of new(er) technology and technique.
科技及技術 — 評估公司現有科技及技術水平，制定政策引進及改良公司的科技及技術。

Descriptions of Scope and Area of Responsibilities (Continued)

範疇及職責範圍簡介(續)

2. Fleet Operation and Management

機隊、航隊、車隊營運及管理

Area of Responsibilities

職責範圍

The operating arm of an establishment in charge of maximising the asset/fleet of the establishment. Specifically:

公司內負責營運公司資產／航隊。具體職務有：

- Fleet management - Manage a fleet to offer a regular/scheduled/liner or irregular/chartered/tramp service; and design/develop the routing pattern according to senior management's decision. Decide on the timing and (sub-)contractors for maintaining the fleet.
航隊管理 — 根據管理層制定的營運策略編制航線及管理航線的整體服務。
- Fleet acquisition & utilisation - Order/purchase/charter-in/ leasing arrangement for the fleet. Also deal with sales/ charter-out/leasing out/disposal/suspension/laid up of the fleet when applicable. Control/allocate space of the fleet where applicable.
航隊調度及配置 — 適當調度航隊，適時為航隊準備配置／保養方案。
- Contractors & suppliers - Select and supervise the services provided by (sub-)contractors & suppliers (such as through tendering mechanisms) for maintaining the fleet.
服務招標及外判 — 擬訂以投標形式甄選服務承包商及供應商的細節，並監管其服務表現。

3. Sales & Customer Service

市場銷售及顧客服務

Area of Responsibilities

職責範圍

The operating arm of an establishment in charge of finding out needs of customers, securing the business and serving customers. Specifically:

公司內負責發掘客戶需要，跟進客戶要求並提供服務，以拓展公司業務。具體職務有：

- Sales & marketing - Assess the market/customers demand/ needs and competition environment; recommend and implement sales target, customer relationship strategy, marketing strategy and pricing strategy etc.
銷售及市場拓展 — 分析市場／客戶的需要及市場競爭環境，建議及推行銷售目標、客戶服務策略、市場策略及定價策略等。
- Customer service - The business process from initial enquiry, booking, baggage services to arrangement of shipments / tickets, and the related procedure and documentation.
顧客服務 — 處理詢問、預訂、行李服務及運送、票務有關手續及所需文件。

Descriptions of Scope and Area of Responsibilities (Continued) 範疇及職責範圍簡介(續)

4. Frontline Cargo / Passenger Operation 貨物調度／乘客運輸、前線操作

Area of Responsibilities 職責範圍

The operating arm of an establishment in charge of arranging cargo shipments/passenger transportation according to the needs of customers, specifically:

公司內負責按客戶需求安排有關貨運。具體職務有：

- Space - Schedule cargo/fleet movements according to space/traffic allocated/conditions.
艙／客位調度 — 按艙位／交通分配，安排貨運／客運日期／班次。
- Logistics arrangement - Operation processes in receiving, storing, distributing, releasing of cargoes/tickets and related processes where applicable.
流程安排 — 處理貨物／票務交收、存倉、分發、運送 的一切事宜及有關手續。
- Contractors & suppliers - Select and supervise the services provided by (sub-)contractors & suppliers for cargo operation/passenger service.
服務招標及外判 — 甄選及監管貨運／客運服務承包商及供應商。
- Safety & security - Ensure the operation is in compliance with mandatory and internal/external requirements.
安全及保安 — 確保貨運過程在符合有關法例與內／外部指引的情況下運作。

5. Technical/Engineering Support 機械／技術支援

Area of Responsibilities 職責範圍

The operating arm of an establishment in charge of technical service. Specifically:

公司內負責提供技術支援之單位。具體職務有：

- Machinery & equipment - Establish technical indicators and management system for the operation of machinery and equipment.
機械及設備 — 建立使用機械及有關設備的技術指標及管理制度。
- Contractors & suppliers - Select and supervise the services provided by (sub-)contractors & suppliers for machinery and equipment.
服務招標及外判 — 甄選及監管機械及設備承包商及供應商。
- Safety & security - Ensure the operation of machinery and equipment is in compliance with mandatory and inhouse requirements.
安全及保安 — 確保機械及設備符合有關法例與內部指引的情況下運作。

Estimated Number of Taxi and Public Light Bus Drivers
的士及公共小巴司機估計人數

| Category 分類 | Estimated number of practitioners 估計從業員人數 |
|----------------------------------|---|
| Taxi Driver 的士司機 | 40,000 ¹ |
| Green Minibus Driver 綠色專線小巴司機 | 8,000 ² |
| Red Minibus Driver 紅色公共小巴司機 | 2,600 ³ |
| Total 總計 | 50,600 |

Source of information 資料來源:

- Motor Transport Workers General Union (Taxi Driver Branch and Public Light Bus Branch) 汽車交通運輸業總工會 (的士司機分會及公共小巴分會)

Assumptions for estimation (only include full-time practitioners who work at least 18 hours per week)

估計之假設 (只包括每周工作不少於 18 小時的全職從業員):

¹ Number of taxi (i.e. 18,163) x 2 rosters + around 10% leave relief

的士數目 (即 18,163) x 兩更 + 約百分之十替更人手

² Number of green minibus (i.e. 3,293) x 2 rosters + around 20% leave relief

綠色專線小巴數目 (即 3,293) x 兩更 + 約百分之二十替更人手

³ Number of red minibus (i.e. 1,057) x 2 rosters + around 20% leave relief

紅色公共小巴數目 (即 1,057) x 兩更 + 約百分之二十替更人手

Transport and Logistics related Post-secondary Programmes
運輸及物流相關專上課程

Numbers of Graduates of UGC-funded Degree Courses and VTC Courses
大學教育資助委員會資助學士學位課程及職業訓練局課程畢業生人數

| Course Name 課程名稱 | *Course Provider 開辦院校 | Level 程度 | Projected Number of Graduates 推算畢業人數 | |
|--|--------------------------|------------------------|---|------|
| | | | 2019 | 2020 |
| BEng (Hons) in e-Logistics and Technology Management 電子物流及科技管理學（榮譽）工學士學位 | CityU 城大 | Degree 學士學位 | 27 | - |
| BBA (Hons) Aviation Management & Logistics 航空管理及物流（榮譽）工商管理學士學位 | PolyU 理大 | Degree 學士學位 | 40 | 40 |
| BBA (Hons) Global Supply Chain Management 全球供應鏈管理（榮譽）工商管理學士學位 | PolyU 理大 | Degree 學士學位 | 102 | 88 |
| BBA (Hons) International Shipping and Transport Logistics 國際航運及物流管理（榮譽）工商管理學士學位 | PolyU 理大 | Degree 學士學位 | 111 | 110 |
| BEng (Hons) Transportation Systems Engineering 運輸系統工程學（榮譽）工學士學位 | PolyU 理大 | Degree 學士學位 | 51 | 51 |
| BEng(Hons) Air Transport Engineering 民航工程學（榮譽）工學士學位 | PolyU 理大 | Degree 學士學位 | 44 | 44 |
| BSc (Hons) Aviation Operations and Systems 航空營運及系統學（榮譽）理學士學位 | PolyU 理大 | Degree 學士學位 | 40 | 40 |
| BSc (Hons) Logistics Engineering with Management 物流工程兼管理（榮譽）理學士學位 | PolyU 理大 | Degree 學士學位 | 23 | 21 |
| BSc (Hons) Scheme in Logistics & Enterprise Engineering 物流及企業工程（榮譽）理學士學位組合課程 | PolyU 理大 | Degree 學士學位 | 30 | 30 |
| BEng Logistics Management and Engineering 物流管理及工程學工學士 | HKUST 科大 | Degree 學士學位 | 40 | 37 |
| BEng Logistics Management and Engineering and BBA General Business Management 物流管理及工程學工學士及綜合商業管理學工商管理學士 | HKUST 科大 | Degree 學士學位 | 5 | - |
| Higher Diploma in International Transport Logistics 國際物流管理高級文憑 | PolyU 理大 | Higher Diploma 高級文憑 | 24 | 2 |
| Higher Diploma in Airport Operations Management 機場營運管理高級文憑 | IVE | Higher Diploma 高級文憑 | 112 | 69 |
| Higher Diploma in Aviation 航空學高級文憑 | IVE | Higher Diploma 高級文憑 | 59 | 56 |

| Course Name 課程名稱 | *Course Provider 開辦院校 | Level 程度 | Projected Number of Graduates 推算畢業人數 | |
|---|--------------------------|------------------------|---|------|
| | | | 2019 | 2020 |
| Higher Diploma in Airfreight Management and Global Logistics 航空及環球物流高級文憑 | IVE | Higher Diploma 高級文憑 | 74 | - |
| Higher Diploma in Aviation Management and Global Logistics 航空及環球物流高級文憑 | IVE | Higher Diploma 高級文憑 | - | 16 |
| Higher Diploma in Customer Services for Aviation and Passenger Transport 航空與客運服務高級文憑 | IVE | Higher Diploma 高級文憑 | 74 | 66 |
| Total 總數 | | | 856 | 670 |

Note 註：

| | |
|---------------------------|---|
| * Course Provider 開辦院校 | Full Name 院校全名 |
| CityU 城大 | City University of Hong Kong 香港城市大學 |
| PolyU 理大 | The Hong Kong Polytechnic University 香港理工大學 |
| HKUST 科大 | Hong Kong University of Science and Technology 香港科技大學 |
| IVE | The Hong Kong Institute of Vocational Education 香港專業教育學院 |

Transport and Logistics related Post-secondary Programmes
運輸及物流相關專上課程

Other relevant Self-financing Post-Secondary Programmes
其他相關自資專上課程

| Course Name 課程名稱 | ^Course Provider 開辦院校 | Level 程度 |
|---|--|-------------------------|
| Associate of Business Administration in Global Logistics and Supply Chain Management 工商管理副學士（環球物流及供應鏈管理） | CityU CCCU 城大專上學院 | Associate Degree 副學士 |
| Associate of Science in Aviation and Pilot Studies 理學副學士（航空及飛行） | CityU CCCU 城大專上學院 | Associate Degree 副學士 |
| Associate of Science in Airport Operations and Aviation Logistics 理學副學士（機場營運及航空物流） | CityU CCCU 城大專上學院 | Associate Degree 副學士 |
| BSc (Hons) in Aviation Management 航空管理榮譽理學士課程 | CityU SCOPE (with Coventry University) 城大專業進修學院 (with Coventry University) | Degree 學士學位 |
| BA (Hons) International Tourism and Airline Management 國際旅遊及航空管理榮譽文學士 | CityU SCOPE (with Edinburgh Napier University) 城大專業進修學院 (with Edinburgh Napier University) | Degree 學士學位 |
| Bachelor of Aviation (Management) 航空管理學士 | HKBU SCE (with University of South Australia) 浸大持續教育學院 (with University of South Australia) | Degree 學士學位 |
| Higher Diploma in Management (Aviation Administration) 管理學高級文憑（航空行政管理） | HKBU SCE 浸大持續教育學院 | Higher Diploma 高級文憑 |
| Higher Diploma in Airline Service and Management 航空服務及管理高級文憑 | Lingnan LIFE 嶺大持續進修學院 | Higher Diploma 高級文憑 |
| BBA (Hons) in Supply Chain Management 供應鏈管理工商管理（榮譽）學士 | HSU 恒大 | Degree 學士學位 |
| BA (Honours) in Business (Operations and Supply Chain Management) 商業（榮譽）文學士（營運及供應鏈管理） | PolyU SPEED 理大專業進修學院 | Degree 學士學位 |
| Associate in Business (Logistics and Supply Chain Management) 工商業副學士（物流及供應鏈管理） | PolyU HKCC 理大香港專上學院 | Associate Degree 副學士 |
| BBA with Honours in Global Marketing and Supply Chain Management 環球市場及供應鏈榮譽工商管理學士 | OUHK 香港公開大學 | Degree 學士學位 |
| Higher Diploma in Aviation and Ramp Management 航空及停機坪管理高級文憑 | OUHK LKS 香港公開大學李嘉誠專業進修學院 | Higher Diploma 高級文憑 |

| Course Name 課程名稱 | ^Course Provider 開辦院校 | Level 程度 |
|---|-----------------------------|------------------------|
| Higher Diploma in Tourism and Airline Studies 旅遊及航空業高級文憑 | OUHK LKS 香港公開大學李嘉誠專業進修學院 | Higher Diploma 高級文憑 |
| Higher Diploma in Global Supply Chain Management 環球供應鏈管理高級文憑 | HKU SPACE 港大專業進修學院 | Higher Diploma 高級文憑 |
| Higher Diploma in Aviation and Piloting 航空及飛行高級文憑 | HKU SPACE 港大專業進修學院 | Higher Diploma 高級文憑 |
| Higher Diploma in Aviation Studies 航空學高級文憑 | HKU SPACE 港大專業進修學院 | Higher Diploma 高級文憑 |
| Higher Diploma in Airline and Airport Services 航空公司及機場服務高級文憑 | HKU SPACE 港大專業進修學院 | Higher Diploma 高級文憑 |

Note 註:

| ^ Course Provider 開辦院校 | Full Name 院校全名 |
|-----------------------------|--|
| CityU CCCU 城大專上學院 | City University of Hong Kong - Community College of City University/UOW College Hong Kong 香港城市大學專上學院 |
| CityU SCOPE 城大專業進修學院 | City University of Hong Kong - School of Continuing and Professional Education 香港城市大學專業進修學院 |
| HKBU SCE 浸大持續教育學院 | Hong Kong Baptist University - School of Continuing Education 香港浸會大學持續教育學院 |
| Lingnan LIFE 嶺大持續進修學院 | Lingnan University - Lingnan Institute of Further Education 嶺南大學持續進修學院 |
| HSU 恒大 | The Hang Seng University of Hong Kong 香港恒生大學 |
| PolyU SPEED 理大專業進修學院 | The Hong Kong Polytechnic University - School of Professional Education and Executive Development 香港理工大學專業進修學院 |
| PolyU HKCC 理大香港專上學院 | The Hong Kong Polytechnic University - Hong Kong Community College 香港理工大學香港專上學院 |
| OUHK 香港公開大學 | The Open University of Hong Kong 香港公開大學 |
| OUHK LKS 香港公開大學李嘉誠專業進修學院 | The Open University of Hong Kong - Li Ka Shing Institute of Professional and Continuing Education 香港公開大學李嘉誠專業進修學院 |
| HKU SPACE 港大專業進修學院 | The University of Hong Kong - HKU SPACE Community College 香港大學專業進修學院 |

Remarks 備註:

Programme information is provided for reference and may not be exhaustive.

上述資料只供參考，或未能盡錄所有課程。

Reindustrialisation and Technology Training Programme (RTTP)

The Innovation and Technology Commission (ITC) launched the RTTP in August 2018 under the Technology Talent Scheme. It aims at subsidising local companies on a 2:1 matching basis to train their staff in advanced technology, especially those related to “Industry 4.0”. Each company is subject to a funding ceiling of HK\$500,000 in each financial year.

Eligibility:

- registered in Hong Kong under the Business Registration Ordinance
- non-government and non-subvented organisation
- the employee nominated is a Hong Kong permanent resident with the necessary background/experience relevant to the advanced technology

Types of Training Courses Supported:

- Public Courses - open to the public for enrolment
- Tailor-made Courses - designed for a particular company
- The technologies covered by the training courses should be advanced in nature and not yet widely adopted in Hong Kong. The adoption of such technologies should also benefit the economy of Hong Kong.
- Both relevant local and non-local courses can be supported.

Source: rttp.vtc.edu.hk

再工業化及科技培訓計劃

創新科技署於 2018 年 8 月在科技專才培訓計劃下推出再工業化及科技培訓計劃，旨在以 2：1 配對形式資助本地企業人員接受高端科技培訓，尤其是與「工業 4.0」有關的培訓。每一間公司每一個財政年度的資助上限為 50 萬港元。

申請資格：

- 按商業登記條例在香港登記
- 非政府及非受資助機構
- 被推薦的僱員為香港永久居民並具備該高端科技所需的相關背景／經驗

支持的培訓課程類型：

- 公眾課程 - 接受公眾申請
- 專門設計的課程 - 為特定公司設計
- 培訓課程所涵蓋的科技必須是高端技術及未在香港廣泛採用，而採用該科技對本港經濟會有所裨益
- 本地及非本地的課程均獲支持

資料來源：rttp.vtc.edu.hk

Maritime and Aviation Training Fund (MATF)

The \$100 million Maritime and Aviation Training Fund (MATF) approved by the Legislative Council in January 2014 came into operation on 1 April 2014. In May 2019, \$200 million was approved to be injected into the MATF to sustain and enhance existing training schemes and scholarships, as well for launching new initiatives for the maritime and aviation sectors. The aim is to build up in due course a vibrant, diversified and competitive pool of professionals and technical personnel to support Hong Kong's future development in the two sectors.

There are a number of schemes operating under the MATF. One of them is the **Maritime and Aviation Internship Scheme** which contributes up to 75% or \$7,000 (with effect from 1 May 2019) (whichever is lower) towards each student's monthly honorarium for an internship period up to three months. The arrangement of the scheme is as follows:

Partnership arrangement

Government's support

- To reimburse the participating companies of the monthly honorarium paid to interns up to 75% or \$7,000 (with effect from 1 May 2019) (whichever is lower) for an internship period up to three months.

Company's role

- To register and offer internship places under the MATF for a minimum of 4 weeks (for maritime, the internship should be offered during summer vacation, i.e. from May to September);
- To pay the monthly honorarium to student interns during the internship period, and then claim for reimbursement from the MATF regarding the sum sponsored by the Government, together with an evaluation of the scheme, after completion of internship;
- To give a fruitful and rewarding experience to the interns; and
- To release the interns for a few activities organised by the MATF (if any).

Source: www.matf.gov.hk

海運及空運人才培訓基金

立法會於 2014 年 1 月通過成立 1 億元的「海運及空運人才培訓基金」（「基金」），在同年 4 月 1 日開始運作。「基金」於 2019 年 5 月再獲注資 2 億元，以持續和優化現行的培訓和獎學金計劃，以及在海運和航空業界推行新措施。「基金」旨在逐漸建立一個有活力、多元化和具競爭力的專業及技術人才庫，支持香港海運和航空業的長遠發展。

目前有多項培訓和獎學金計劃在基金支持下推行，當中包括**海運和航空業實習計劃**，資助實習學生每月酬金的 75% 或 7,000 元（由 2019 年 5 月 1 日起生效）（以較低者為準），資助期最長三個月。計劃詳情如下：

伙伴安排

政府的支持

- 向提供實習職位的公司津貼實習生每月酬金的 75% 或 7,000 元（由 2019 年 5 月 1 日起生效）（兩者以較低者為準），上限為三個月。

公司的角色

- 在「基金」登記並一年內提供為期最少 4 星期的實習職位（如為海運，實習需安排於暑期內（即 5 月至 9 月））；
- 向實習生支付薪酬。在實習完結後，向「基金」提交薪酬退款申請及對計劃的評估；
- 為實習生提供有意義及有裨益的實習經驗；及
- 批准實習生參與由「基金」舉辦的一些活動（如有）。

資料來源：www.matf.gov.hk

Out-Centre Course (OCC) Scheme

One of the aims of the Transport and Logistics Training Board is to promote training of people employed in the transport and logistics industry so that their skills and knowledge are established and/or improved. The Training Board operates an Out-Centre Course Scheme which provides subsidies to participants of endorsed courses and programmes and also subsidises non-profit making organisers in organising seminars.

For courses, the subsidy is in the form of partial reimbursement of the course fee to participants/trainees upon completion of the approved course/programme. The rate of reimbursement is currently fixed at \$33 per contact hour of the course/programme until further notice. For seminars, the subsidy is in the form of partial reimbursement of the organising expenses to the organiser upon completion of an approved seminar. Vocational Training Council (VTC) will allocate up to 50% of the total cost as subsidy to the organiser, providing that the nature of the proposed seminar is non-profit making and that all expenses are genuinely and reasonably charged.

For detailed requirements, application procedures and list of approved courses, please visit VTC website: <http://www.vtc.edu.hk>

外間課程計劃

運輸及物流業訓練委員會之設立目的之一是鼓勵及促使運輸及貨運業(空運、海運、陸運、倉儲、物流等行業)從業員提高業務知識及技術水平。運輸及物流業訓練委員會撥款資助本行業從業員參加一些指定而與貨運及物流有關的課程，同時亦會資助非牟利機構舉辦講座。

課程方面，從業員完成指定課程後，可獲發還部份課程費用。現時資助水平為每課時\$33(直至另行通知)。講座方面，主辦機構完成指定講座後，可申請發還部份舉辦講座的開支，上限為總開支的百分之五十，惟講座必須為非牟利性質，以及所有支出須真確及合理。

有關計劃詳細要求、申請程序及已批核課程可參考職業訓練局網頁：

<http://www.vtc.edu.hk>。

Statistical Tables
資料統計表

**Table 11.1A: Employer's Preferred Educational Level of Employees by Sector
(Freight Transport)**
表 11.1A：貨運 - 僱員宜有教育程度（按業務界別劃分）

| Level of Education 教育程度 | Sector 業務界別 | | |
|---|----------------|-----------|------------|
| | Air 空運 | Sea 海運 | Land 陸運 |
| Postgraduate Degree 研究生學位 | 0.0% | 0.5% | 0.0% |
| First Degree 學士學位 | 12.6% | 21.3% | 2.8% |
| Sub-degree (e.g. Higher Diploma) 副學位（例如高級文憑） | 12.1% | 17.0% | 1.5% |
| Diploma/Certificate 文憑／證書 | 7.6% | 12.1% | 2.3% |
| Secondary 4 to 7 中四至中七 | 50.1% | 36.0% | 47.7% |
| Secondary 3 or below 中三或以下 | 17.6% | 13.1% | 45.7% |
| Total 總數 | 100.0% | 100.0% | 100.0% |

**Table 11.1B: Employer's Preferred Educational Level of Employees by Sector
(Passenger Transport)**
表 11.1B：客運 - 僱員宜有教育程度（按業務界別劃分）

| Level of Education 教育程度 | Sector 業務界別 | | |
|---|----------------|-----------|------------|
| | Air 空運 | Sea 海運 | Land 陸運 |
| Postgraduate Degree 研究生學位 | 0.0% | 0.0% | 0.0% |
| First Degree 學士學位 | 50.4% | 11.8% | 21.3% |
| Sub-degree (e.g. Higher Diploma) 副學位（例如高級文憑） | 38.5% | 10.0% | 0.6% |
| Diploma/Certificate 文憑／證書 | 3.6% | 19.1% | 2.2% |
| Secondary 4 to 7 中四至中七 | 7.6% | 47.3% | 20.1% |
| Secondary 3 or below 中三或以下 | 0.0% | 11.8% | 55.8% |
| Total 總數 | 100.0% | 100.0% | 100.0% |

Table 11.2: Distribution of Employees' Preferred Level of Education by Branch by Sector by Job Level
表 11.2：僱員宜有教育程度分布情況（按門類、業務界別及職級劃分）

| Branch 門類 | Sector 業務界別 | Job Level 職級 | Preferred Level of Education 宜有教育程度 | | | | | | | Overall 所有教育 程度總數 |
|---|----------------------|--|--|-------------------------|---|----------------------------------|------------------------------|----------------------------------|---------------------|-------------------------|
| | | | Postgraduate Degree 研究生學位 | First Degree 學士學位 | Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) | Diploma/ Certificate 文憑/證書 | Secondary 4 to 7 中四至中七 | Secondary 3 or below 中三或以下 | Unspecified 未有註明 | |
| Freight Transport 貨運 | | | | | | | | | | |
| Warehousing & Cold Storage 貨倉及冷藏庫 | Land Transport 陸運 | Managerial 經理級 | 9 | 272 | 67 | 44 | 113 | 34 | 146 | 685 |
| | | Executive/Supervisory 行政/主任級 | 0 | 68 | 143 | 116 | 381 | 52 | 551 | 1 311 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 6 | 23 | 159 | 2 256 | 3 680 | 962 | 7 086 |
| | | Sub-total 小計 | 9 | 346 | 233 | 319 | 2 750 | 3 766 | 1 659 | 9 082 |
| Cargo Handling Terminals 貨運站 | Sea Transport 海運 | Managerial 經理級 | 0 | 247 | 0 | 0 | 5 | 0 | 3 | 255 |
| | | Executive/Supervisory 行政/主任級 | 0 | 305 | 23 | 31 | 52 | 0 | 0 | 411 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 34 | 1 064 | 102 | 847 | 7 | 1 | 2 055 |
| | | Sub-total 小計 | 0 | 586 | 1 087 | 133 | 904 | 7 | 4 | 2 721 |
| Trucking & Container Haulage 貨車及貨櫃運輸 | Land Transport 陸運 | Managerial 經理級 | 13 | 591 | 55 | 61 | 547 | 16 | 47 | 1 330 |
| | | Executive/Supervisory 行政/主任級 | 0 | 321 | 164 | 246 | 2 751 | 88 | 11 | 3 581 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 0 | 3 | 347 | 14 496 | 20 215 | 2 660 | 37 721 |
| | | Sub-total 小計 | 13 | 912 | 222 | 654 | 17 794 | 20 319 | 2 718 | 42 632 |

Table 11.2: Distribution of Employees' Preferred Level of Education by Branch by Sector by Job Level
表 11.2：僱員宜有教育程度分布情況（按門類、業務界別及職級劃分）

| Branch 門類 | Sector 業務界別 | Job Level 職級 | Preferred Level of Education 宜有教育程度 | | | | | | | Overall 所有教育 程度總數 |
|----------------------------------|----------------------|--|--|-------------------------|---|----------------------------------|------------------------------|----------------------------------|---------------------|-------------------------|
| | | | Postgraduate Degree 研究生學位 | First Degree 學士學位 | Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) | Diploma/ Certificate 文憑/證書 | Secondary 4 to 7 中四至中七 | Secondary 3 or below 中三或以下 | Unspecified 未有註明 | |
| Air Freight Transport 空運承運 | Air Transport 空運 | Managerial 經理級 | 0 | 368 | 31 | 33 | 6 | 0 | 214 | 652 |
| | | Executive/Supervisory 行政/主任級 | 0 | 322 | 736 | 259 | 374 | 0 | 0 | 1 691 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 66 | 523 | 675 | 567 | 2 687 | 0 | 4 518 |
| | | Sub-total 小計 | 0 | 756 | 1 290 | 967 | 947 | 2 687 | 214 | 6 861 |
| Forwarding Agent 貨運代理 | Air Transport 空運 | Managerial 經理級 | 3 | 1 693 | 141 | 57 | 375 | 89 | 88 | 2 446 |
| | | Executive/Supervisory 行政/主任級 | 0 | 66 | 1 305 | 133 | 1 142 | 0 | 86 | 2 732 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 109 | 18 | 544 | 6 353 | 1 558 | 81 | 8 663 |
| | | Sub-total 小計 | 0 | 728 | 99 | 35 | 181 | 340 | 605 | 1 988 |
| Sea Transport 海運 | Sea Transport 海運 | Managerial 經理級 | 0 | 312 | 460 | 156 | 186 | 0 | 488 | 1 602 |
| | | Executive/Supervisory 行政/主任級 | 0 | 113 | 293 | 570 | 3 771 | 1 266 | 761 | 6 774 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 143 | 14 | 6 | 133 | 0 | 25 | 321 |
| | | Sub-total 小計 | 0 | 35 | 102 | 104 | 234 | 0 | 20 | 495 |
| Land Transport 陸運 | Land Transport 陸運 | Managerial 經理級 | 0 | 12 | 0 | 252 | 2 050 | 194 | 112 | 2 620 |
| | | Executive/Supervisory 行政/主任級 | 0 | 3 211 | 2 432 | 1 857 | 14 425 | 3 447 | 2 266 | 27 641 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 3 | | | | | | | |
| | | Sub-total 小計 | 3 | 3 211 | 2 432 | 1 857 | 14 425 | 3 447 | 2 266 | 27 641 |

Table 11.2: Distribution of Employees' Preferred Level of Education by Branch by Sector by Job Level
表 11.2：僱員宜有教育程度分布情況（按門類、業務界別及職級劃分）

| Branch 門類 | Sector 業務界別 | Job Level 職級 | Preferred Level of Education 宜有教育程度 | | | | | | | Overall 所有教育 程度總數 |
|--|----------------------|--|--|-------------------------|---|----------------------------------|------------------------------|----------------------------------|---------------------|-------------------------|
| | | | Postgraduate Degree 研究生學位 | First Degree 學士學位 | Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) | Diploma/ Certificate 文憑/證書 | Secondary 4 to 7 中四至中七 | Secondary 3 or below 中三或以下 | Unspecified 未有註明 | |
| Stevedoring Services 船上/碼頭裝卸 貨物 | Sea Transport 海運 | Managerial 經理級 | 0 | 12 | 15 | 1 | 14 | 53 | 2 | 97 |
| | | Executive/Supervisory 行政/主任級 | 0 | 1 | 10 | 0 | 43 | 55 | 0 | 109 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 0 | 3 | 0 | 113 | 351 | 4 | 471 |
| | Land Transport 陸運 | Managerial 經理級 | 0 | 0 | 0 | 3 | 2 | 0 | 0 | 5 |
| | | Executive/Supervisory 行政/主任級 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 1 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 0 | 0 | 0 | 18 | 10 | 1 | 29 |
| Sub-total 小計 | | | 0 | 13 | 28 | 4 | 191 | 469 | 7 | 712 |
| Couriers (International) 國際速遞 | Air Transport 空運 | Managerial 經理級 | 1 | 336 | 18 | 0 | 6 | 0 | 1 | 362 |
| | | Executive/Supervisory 行政/主任級 | 0 | 85 | 277 | 204 | 195 | 0 | 0 | 761 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 127 | 1 | 4 | 3 553 | 74 | 2 | 3 761 |
| | Sea Transport 海運 | Managerial 經理級 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | Executive/Supervisory 行政/主任級 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 0 | 0 | 0 | 1 | 0 | 2 | 3 |

Table 11.2: Distribution of Employees' Preferred Level of Education by Branch by Sector by Job Level
表 11.2：僱員宜有教育程度分布情況（按門類、業務界別及職級劃分）

| Branch 門類 | Sector 業務界別 | Job Level 職級 | Preferred Level of Education 宜有教育程度 | | | | | | | Overall 所有教育 程度總數 |
|--|----------------------|--|--|-------------------------|---|----------------------------------|------------------------------|----------------------------------|---------------------|-------------------------|
| | | | Postgraduate Degree 研究生學位 | First Degree 學士學位 | Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) | Diploma/ Certificate 文憑/證書 | Secondary 4 to 7 中四至中七 | Secondary 3 or below 中三或以下 | Unspecified 未有註明 | |
| Couriers (International) 國際速遞 | Land Transport 陸運 | Managerial 經理級 | 0 | 131 | 34 | 0 | 17 | 0 | 0 | 182 |
| | | Executive/Supervisory 行政/主任級 | 0 | 49 | 237 | 4 | 102 | 0 | 1 | 393 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 0 | 0 | 14 | 4 838 | 435 | 49 | 5 336 |
| | | Sub-total 小計 | 1 | 728 | 567 | 226 | 8 712 | 509 | 55 | 10 798 |
| Sea Freight Transport 海運承運 | Sea Transport 海運 | Managerial 經理級 | 34 | 836 | 55 | 17 | 102 | 0 | 116 | 1 160 |
| | | Executive/Supervisory 行政/主任級 | 35 | 466 | 145 | 176 | 132 | 0 | 166 | 1 120 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 6 | 279 | 601 | 897 | 298 | 59 | 284 | 2 424 |
| | | Sub-total 小計 | 75 | 1 581 | 801 | 1 090 | 532 | 59 | 566 | 4 704 |
| Ship Management & Chartering 船舶管理及租賃 | Sea Transport 海運 | Managerial 經理級 | 5 | 168 | 11 | 15 | 79 | 2 | 10 | 290 |
| | | Executive/Supervisory 行政/主任級 | 0 | 88 | 4 | 36 | 60 | 0 | 2 | 190 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 40 | 128 | 35 | 269 | 97 | 12 | 581 |
| | | Sub-total 小計 | 5 | 296 | 143 | 86 | 408 | 99 | 24 | 1 061 |
| Other Transport Logistics Service Providers 其他物流服務經 營者 | Land Transport 陸運 | Managerial 經理級 | 0 | 35 | 34 | 3 | 3 | 0 | 0 | 75 |
| | | Executive/Supervisory 行政/主任級 | 0 | 0 | 23 | 2 | 126 | 0 | 0 | 151 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 0 | 10 | 15 | 575 | 2 669 | 0 | 3 269 |
| | | Sub-total 小計 | 0 | 35 | 67 | 20 | 704 | 2 669 | 0 | 3 495 |

Table 11.2: Distribution of Employees' Preferred Level of Education by Branch by Sector by Job Level
表 11.2：僱員宜有教育程度分布情況（按門類、業務界別及職級劃分）

| Branch 門類 | Sector 業務界別 | Job Level 職級 | Preferred Level of Education 宜有教育程度 | | | | | | | Overall 所有教育 程度總數 |
|--|---------------------|--|--|-------------------------|---|----------------------------------|------------------------------|----------------------------------|---------------------|-------------------------|
| | | | Postgraduate Degree 研究生學位 | First Degree 學士學位 | Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) | Diploma/ Certificate 文憑/證書 | Secondary 4 to 7 中四至中七 | Secondary 3 or below 中三或以下 | Unspecified 未有註明 | |
| All branches of Freight Transport 所有貨運類別 | Air Transport 空運 | Managerial 經理級 | 4 | 2 397 | 190 | 90 | 387 | 89 | 303 | 3 460 |
| | | Executive/Supervisory 行政/主任級 | 0 | 473 | 2 318 | 596 | 1 711 | 0 | 86 | 5 184 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 302 | 542 | 1 223 | 10 473 | 4 319 | 83 | 16 942 |
| | | Sub-total 小計 | 4 | 3 172 | 3 050 | 1 909 | 12 571 | 4 408 | 472 | 25 586 |
| Sea Transport 海運 | Managerial 經理級 | Executive/Supervisory 行政/主任級 | 39 | 1 991 | 180 | 68 | 381 | 395 | 736 | 3 790 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 35 | 1 172 | 642 | 399 | 473 | 55 | 656 | 3 432 |
| | | Sub-total 小計 | 6 | 466 | 2 089 | 1 604 | 5 299 | 1 780 | 1 064 | 12 308 |
| | | Sub-total 小計 | 80 | 3 629 | 2 911 | 2 071 | 6 153 | 2 230 | 2 456 | 19 530 |
| Land Transport 陸運 | Managerial 經理級 | Executive/Supervisory 行政/主任級 | 22 | 1 172 | 204 | 117 | 815 | 50 | 218 | 2 598 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 473 | 669 | 472 | 3 595 | 140 | 583 | 5 932 |
| | | Sub-total 小計 | 0 | 18 | 36 | 787 | 24 233 | 27 203 | 3 784 | 56 061 |
| | | Sub-total 小計 | 22 | 1 663 | 909 | 1 376 | 28 643 | 27 393 | 4 585 | 64 591 |

Table 11.2: Distribution of Employees' Preferred Level of Education by Branch by Sector by Job Level
表 11.2 : 僱員宜有教育程度分布情況 (按門類、業務界別及職級劃分)

| Branch 門類 | Sector 業務界別 | Job Level 職級 | Preferred Level of Education 宜有教育程度 | | | | | | | Overall 所有教育 程度總數 |
|---|----------------------|--|--|-------------------------|---|----------------------------------|------------------------------|----------------------------------|---------------------|-------------------------|
| | | | Postgraduate Degree 研究生學位 | First Degree 學士學位 | Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑) | Diploma/ Certificate 文憑/證書 | Secondary 4 to 7 中四至中七 | Secondary 3 or below 中三或以下 | Unspecified 未有註明 | |
| Passenger Transport 客運 | | | | | | | | | | |
| Vehicle and Rail Operators 車輛及鐵路客運 經營者 | Land Transport 陸運 | Managerial 經理級 | 2 | 1 443 | 60 | 23 | 47 | 28 | 8 | 1 611 |
| | | Executive/Supervisory 行政/主任級 | 0 | 6 360 | 134 | 197 | 723 | 52 | 18 | 7 484 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 32 | 20 | 597 | 6 648 | 20 483 | 255 | 28 035 |
| | | Sub-total 小計 | 2 | 7 835 | 214 | 817 | 7 418 | 20 563 | 281 | 37 130 |
| Vessel Transport Operators 水上客運經營者 | Sea Transport 海運 | Managerial 經理級 | 0 | 83 | 6 | 4 | 71 | 0 | 3 | 167 |
| | | Executive/Supervisory 行政/主任級 | 0 | 14 | 56 | 17 | 98 | 0 | 9 | 194 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 5 | 24 | 144 | 240 | 102 | 52 | 567 |
| | | Sub-total 小計 | 0 | 102 | 86 | 165 | 409 | 102 | 64 | 928 |
| Aviation Service Operators 航空客運經營者 | Air Transport 空運 | Managerial 經理級 | 0 | 5 336 | 8 | 12 | 12 | 0 | 591 | 5 959 |
| | | Executive/Supervisory 行政/主任級 | 0 | 5 556 | 1 397 | 37 | 152 | 0 | 466 | 7 608 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 0 | 645 | 7 409 | 772 | 1 569 | 0 | 1 859 | 12 254 |
| | | Sub-total 小計 | 0 | 11 537 | 8 814 | 821 | 1 733 | 0 | 2 916 | 25 821 |

Table 11.3A: Preferred Competency of Employees by Job Level (Freight Transport)
表 11.3A : 貨運 - 僱員宜有能力 (按職級劃分)

| Functional Area 職能範疇 | Industry 行業 | | | | | |
|---|--------------------------------|-------------------------------------|--|-------------------|-------------------------------------|--|
| | Air Freight & Express 空運及快遞 | | | Shipping 海運 | | |
| | Managerial 經理級 | Executive/ Supervisory 行政/主任級 | Clerical/ Craftsman/ Operative 文員/技工/ 操作工級 | Managerial 經理級 | Executive/ Supervisory 行政/主任級 | Clerical/ Craftsman/ Operative 文員/技工/ 操作工級 |
| Operation Management 營運管理 | 85 | 50 | 143 | 59 | 47 | 201 |
| Planning and Design of Logistics Solutions 物流方案規劃及設計 | 62 | 33 | 107 | 54 | 31 | 117 |
| Sales, Marketing and Customer Services 營銷、市場推廣及客戶 服務 | 88 | 64 | 70 | 71 | 58 | 118 |
| Cargo Transport and Handling 貨物運輸及處理 | 244 | 59 | 300 | 26 | 43 | 119 |
| Cargo Safety and Security 貨物安全及保安 | 316 | 123 | 411 | 36 | 38 | 99 |
| E-Logistics 電子物流 | 31 | 41 | 42 | 24 | 20 | 30 |
| Quality Management 品質管理 | 31 | 44 | 36 | 28 | 29 | 91 |
| Import / Export Documentation and Procedures 進出口文件處理 | 65 | 65 | 81 | 67 | 60 | 74 |
| Insurance and Legal Matters 保險及法律事務 | 30 | 17 | 15 | 35 | 14 | 24 |
| Occupational Safety & Health 職業安全及健康 | 40 | 41 | 43 | 47 | 52 | 104 |

Note : Figures in number of Establishments
 註：數字為機構數目

Table 11.3A: Preferred Competency of Employees by Job Level (Freight Transport) – continued
表 11.3A：貨運 - 僱員宜有能力（按職級劃分） - 續

| Functional Area 職能範疇 | Industry 行業 | | | | | | | | |
|---|--|---|--|--|---|--|--|---|--|
| | Land Transport and Distribution 陸路運輸及分發 | | | Terminals, Warehouse, and Logistics Centre 貨運站、倉庫及物流中心 | | | Supporting and Ancillary Services 支援及輔助服務 | | |
| | Managerial 經理級 | Executive/ Supervisory 行政/ 主任級 | Clerical/ Craftsman/ Operative 文員/技工 /操作工級 | Managerial 經理級 | Executive/ Supervisory 行政/ 主任級 | Clerical/ Craftsman/ Operative 文員/技工 /操作工級 | Managerial 經理級 | Executive/ Supervisory 行政/ 主任級 | Clerical/ Craftsman/ Operative 文員/技工 /操作工級 |
| Operation Management 營運管理 | 80 | 173 | 49 | 108 | 184 | 129 | 9 | 4 | 5 |
| Planning and Design of Logistics Solutions 物流方案規劃及設計 | 33 | 155 | 13 | 47 | 141 | 23 | 4 | 4 | 3 |
| Sales, Marketing and Customer Services 營銷、市場推廣及客戶服務 | 25 | 101 | 28 | 37 | 104 | 33 | 8 | 2 | 7 |
| Cargo Transport and Handling 貨物運輸及處理 | 19 | 83 | 414 | 47 | 66 | 123 | 5 | 4 | 13 |
| Cargo Safety and Security 貨物安全及保安 | 30 | 166 | 560 | 46 | 187 | 199 | 4 | 5 | 12 |
| E-Logistics 電子物流 | 17 | 132 | 412 | 45 | 114 | 127 | 2 | 1 | 7 |
| Quality Management 品質管理 | 17 | 109 | 387 | 26 | 138 | 28 | 6 | 6 | 8 |
| Import / Export Documentation 出入口文件處理 | 53 | 63 | 65 | 80 | 97 | 74 | 3 | 4 | 13 |
| Insurance, Legal Matters & Compliance 保險、法律事務及遵守法規 | 66 | 150 | 135 | 83 | 152 | 133 | 5 | 4 | 6 |
| Environment Protection 環境保護 | 23 | 137 | 331 | 34 | 105 | 11 | 7 | 1 | 5 |

Note : Figures in number of Establishments
 註：數字為機構數目

Table 11.3B: Preferred Competency of Employees by Job Level (Passenger Transport)
表 11.3B：客運 - 僱員宜有能力（按職級劃分）

| Functional Area 職能範疇 | Job Level 職級 | | |
|---|-------------------|-------------------------------------|--|
| | Managerial 經理級 | Executive/ Supervisory 行政／主任級 | Clerical/ Craftsman/ Operative 文員／技工／ 操作工級 |
| Trade Specific Skills 業內專業技能 | | | |
| Managerial / Supervisory / Coaching Skills / Strategic Management 管理／督導／訓練技巧／策略管理 | 83 | 57 | 26 |
| Customer Relationship / Complaints Handling 客戶關係／投訴處理 | 62 | 119 | 116 |
| Sales and Marketing 銷售及市務推廣 | 57 | 42 | 83 |
| Merchandising and Purchasing 採購 | 11 | 11 | 6 |
| Financing and Accounting 財務及會計 | 24 | 21 | 16 |
| Operating Special Vehicles / Equipment 操作特別用途車輛／工具 | 14 | 23 | 52 |
| Law & Regulatory of Transport 交通法律和法規 | 44 | 40 | 47 |
| Generic & Other Skills 一般及其他技巧 | | | |
| Crowd Control 人羣控制 | 24 | 37 | 70 |
| First Aid 急救 | 22 | 40 | 39 |
| Handling of Emergency Incidents 突發事情應變 | 54 | 66 | 95 |
| Repair and Maintenance 機械維修及保養 | 16 | 31 | 45 |
| Others 其他 | 4 | 3 | 6 |

Note : Figures in number of Establishments
 註：數字為機構數目

Table 11.4A: Summary of Manpower Information by Sector by Scope by Job Level (Freight Transport)

表 11.4A：貨運 - 人力資料摘要（按業務界別、範疇及職級劃分）

| Sector 界別 | Scope 職責範疇 | Job Level 職級 | No. of Employees 僱員人數 (A) | No. of Vacancies 空缺額 (B) | Manpower in 2018 2018年總人力 (A+B) | Manpower Forecast in 2019 2019年人力預測 | Manpower Forecast in 2020 2020年人力預測 |
|---|---|--|---------------------------------|--------------------------------|---------------------------------------|---|---|
| Air Transport 空運 | Business Management, Strategic Planning 業務管理、計劃策略 | Managerial 經理級 | 901 | 11 | 912 | 926 | 928 |
| | | Executive/Supervisory 行政/主任級 | 239 | 9 | 248 | 249 | 250 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 545 | 10 | 555 | 557 | 557 |
| | Fleet Operation and Management 機隊營運及管理 | Managerial 經理級 | 133 | 2 | 135 | 139 | 134 |
| | | Executive/Supervisory 行政/主任級 | 223 | 7 | 230 | 235 | 235 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 409 | 48 | 457 | 459 | 467 |
| | Sales & Customer Service 市場銷售及顧客服務 | Managerial 經理級 | 1 525 | 10 | 1 535 | 1 549 | 1 547 |
| | | Executive/Supervisory 行政/主任級 | 1 715 | 15 | 1 730 | 1 738 | 1 746 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 4 373 | 73 | 4 446 | 4 452 | 4 456 |
| | Frontline Cargo Operation 貨物調度、前線操作 | Managerial 經理級 | 860 | 3 | 863 | 871 | 863 |
| | | Executive/Supervisory 行政/主任級 | 2 787 | 42 | 2 829 | 2 853 | 2 884 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 11 463 | 513 | 11 976 | 11 997 | 11 994 |
| Technical/Engineering Support 機械/技術支援 | Managerial 經理級 | 41 | 1 | 42 | 42 | 42 | |
| | Executive/Supervisory 行政/主任級 | 220 | 9 | 229 | 238 | 238 | |
| | Clerical/Craftsman/Operative 文員/技工/操作工級 | 152 | 20 | 172 | 186 | 186 | |

Table 11.4A: Summary of Manpower Information by Sector by Scope by Job Level (Freight Transport)
表 11.4A：貨運 - 人力資料摘要（按業務界別、範疇及職級劃分）

| Sector 界別 | Scope 職責範疇 | Job Level 職級 | No. of Employees 僱員人數 (A) | No. of Vacancies 空缺額 (B) | Manpower in 2018 2018 年總人力 (A+B) | Manpower Forecast in 2019 2019 年人力預測 | Manpower Forecast in 2020 2020 年人力預測 |
|--|---|--|---------------------------------|--------------------------------|--|--|--|
| Air Transport 空運 | Sub-total 小計 | Managerial 經理級 | 3 460 | 27 | 3 487 | 3 527 | 3 514 |
| | | Executive/Supervisory 行政/主任級 | 5 184 | 82 | 5 266 | 5 313 | 5 353 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 16 942 | 664 | 17 606 | 17 651 | 17 660 |
| Sea Transport 海運 | Business Management, Strategic Planning 業務管理、計劃策略 | Managerial 經理級 | 1 097 | 2 | 1 099 | 1 100 | 1 099 |
| | | Executive/Supervisory 行政/主任級 | 536 | 16 | 552 | 557 | 557 |
| | Fleet Operation and Management 航隊營運及管理 | Clerical/Craftsman/Operative 文員/技工/操作工級 | 746 | 13 | 759 | 761 | 760 |
| | | Managerial 經理級 | 261 | 3 | 264 | 262 | 262 |
| | Sales & Customer Service 市場銷售及顧客服務 | Executive/Supervisory 行政/主任級 | 346 | 4 | 350 | 355 | 355 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 448 | 14 | 462 | 467 | 467 |
| | Frontline Cargo Operation 貨物調度、前線操作 | Managerial 經理級 | 1 502 | 5 | 1 507 | 1 517 | 1 535 |
| | | Executive/Supervisory 行政/主任級 | 1 197 | 8 | 1 205 | 1 213 | 1 215 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 2 598 | 25 | 2 623 | 2 620 | 2 624 |
| | | | Managerial 經理級 | 776 | 4 | 780 | 792 |
| Executive/Supervisory 行政/主任級 | | | 1 130 | 5 | 1 135 | 1 137 | 1 140 |
| Clerical/Craftsman/Operative 文員/技工/操作工級 | | | 7 659 | 51 | 7 710 | 7 752 | 7 724 |

Table 11.4A: Summary of Manpower Information by Sector by Scope by Job Level (Freight Transport)
表 11.4A：貨運 - 人力資料摘要（按業務界別、範疇及職級劃分）

| Sector 界別 | Scope 職責範疇 | Job Level 職級 | No. of Employees 僱員人數 (A) | No. of Vacancies 空缺額 (B) | Manpower in 2018 2018年總人力 (A+B) | Manpower Forecast in 2019 2019年人力預測 | Manpower Forecast in 2020 2020年人力預測 |
|-------------------------|---|---|---------------------------------|--------------------------------|---------------------------------------|---|---|
| Sea Transport 海運 | Technical/Engineering Support 機械/技術支援 | Managerial 經理級 | 154 | 1 | 155 | 157 | 157 |
| | | Executive/Supervisory 行政/主任級 | 223 | 0 | 223 | 231 | 231 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 857 | 41 | 898 | 926 | 931 |
| | | Managerial 經理級 | 3 790 | 15 | 3 805 | 3 828 | 3 847 |
| | | Executive/Supervisory 行政/主任級 | 3 432 | 33 | 3 465 | 3 493 | 3 498 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 12 308 | 144 | 12 452 | 12 526 | 12 506 |
| | | Managerial 經理級 | 634 | 3 | 637 | 626 | 642 |
| | | Executive/Supervisory 行政/主任級 | 311 | 10 | 321 | 313 | 319 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 505 | 2 | 507 | 517 | 523 |
| | | Managerial 經理級 | 108 | 6 | 114 | 117 | 118 |
| Land Transport 陸運 | Business Management, Strategic Planning 業務管理、計劃策略 | Executive/Supervisory 行政/主任級 | 153 | 3 | 156 | 161 | 162 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 351 | 23 | 374 | 375 | 374 |
| | | Managerial 經理級 | 612 | 1 | 613 | 615 | 617 |
| | | Executive/Supervisory 行政/主任級 | 605 | 4 | 609 | 622 | 633 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 3 898 | 35 | 3 933 | 3 938 | 3 940 |
| | | Sales & Customer Service 市場銷售及顧客服務 | | | | | |
| | | Fleet Operation and Management 車隊營運及管理 | | | | | |
| | | Sub-total 小計 | | | | | |
| | | Technical/Engineering Support 機械/技術支援 | | | | | |
| | | Business Management, Strategic Planning 業務管理、計劃策略 | | | | | |
| | Fleet Operation and Management 車隊營運及管理 | | | | | | |
| | Sales & Customer Service 市場銷售及顧客服務 | | | | | | |

Table 11.4A: Summary of Manpower Information by Sector by Scope by Job Level (Freight Transport)
表 11.4A：貨運 - 人力資料摘要（按業務界別、範疇及職級劃分）

| Sector 界別 | Scope 職責範疇 | Job Level 職級 | No. of Employees 僱員人數 (A) | No. of Vacancies 空缺額 (B) | Manpower in 2018 2018 年總人力 (A+B) | Manpower Forecast in 2019 2019 年人力預測 | Manpower Forecast in 2020 2020 年人力預測 |
|-------------------------|---|--|---------------------------------|--------------------------------|--|--|--|
| Land Transport 陸運 | Frontline Cargo Operation 貨物調度、前線操作 | Managerial 經理級 | 1 224 | 26 | 1 250 | 1 272 | 1 274 |
| | | Executive/Supervisory 行政/主任級 | 4 783 | 119 | 4 902 | 4 922 | 4 941 |
| | Technical/Engineering Support 機械/技術支援 | Clerical/Craftsman/Operative 文員/技工/操作工級 | 50 178 | 2 592 | 52 770 | 53 302 | 53 463 |
| | | Managerial 經理級 | 20 | 0 | 20 | 21 | 21 |
| Overall 總數 | Sub-total 小計 | Executive/Supervisory 行政/主任級 | 80 | 0 | 80 | 80 | 80 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 1 129 | 13 | 1 142 | 1 138 | 1 138 |
| | Sub-total 小計 | Managerial 經理級 | 2 598 | 36 | 2 634 | 2 651 | 2 672 |
| | | Executive/Supervisory 行政/主任級 | 5 932 | 136 | 6 068 | 6 098 | 6 135 |
| Overall 總數 | Sub-total 小計 | Clerical/Craftsman/Operative 文員/技工/操作工級 | 56 061 | 2 665 | 58 726 | 59 270 | 59 438 |
| | | Managerial 經理級 | 9 848 | 78 | 9 926 | 10 006 | 10 033 |
| | Sub-total 小計 | Executive/Supervisory 行政/主任級 | 14 548 | 251 | 14 799 | 14 904 | 14 986 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 85 311 | 3 473 | 88 784 | 89 447 | 89 604 |
| Total | | | 109 707 | 3 802 | 113 509 | 114 357 | 114 623 |

Table 11.4B: Summary of Manpower Information by Sector by Scope by Job Level (Passenger Transport)
表 11.4B：客運 - 人力資料摘要（按業務界別、範疇及職級劃分）

| Sector 界別 | Scope 職責範疇 | Job Level 工作職級 | No. of Employees 僱員人數 (A) | No. of Vacancies 空缺額 (B) | Manpower in 2018 2018年總人力 (A+B) | Manpower Forecast in 2019 2019年人力預測 | Manpower Forecast in 2020 2020年人力預測 | |
|---------------------|---|--|--|--------------------------------|---------------------------------------|---|---|--------|
| Air Transport 空運 | Business Management, Strategic Planning 業務管理、計劃策略 | Managerial 經理級 | 136 | 7 | 143 | 140 | 142 | |
| | | Executive/Supervisory 行政/主任級 | 152 | 23 | 175 | 175 | 175 | |
| | Fleet Operation and Management 機隊營運及管理 | Clerical/Craftsman/Operative 文員/技工/操作工級 | 140 | 2 | 142 | 142 | 142 | |
| | | Managerial 經理級 | 269 | 6 | 275 | 274 | 274 | |
| | Sales & Customer Service 市場銷售及顧客服務 | Executive/Supervisory 行政/主任級 | 549 | 20 | 569 | 568 | 568 | |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 854 | 105 | 959 | 953 | 953 | |
| | Frontline Passenger Operation 乘客運輸、前線操作 | Managerial 經理級 | 148 | 0 | 148 | 148 | 149 | |
| | | Executive/Supervisory 行政/主任級 | 181 | 8 | 189 | 189 | 189 | |
| | Technical/Engineering Support 機械/技術支援 | Clerical/Craftsman/Operative 文員/技工/操作工級 | 715 | 11 | 726 | 723 | 723 | |
| | | Managerial 經理級 | 5 252 | 201 | 5 453 | 5 458 | 5 450 | |
| | | | Executive/Supervisory 行政/主任級 | 6 465 | 288 | 6 753 | 6 751 | 6 752 |
| | | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 10 428 | 441 | 10 869 | 10 976 | 10 976 |
| | | Managerial 經理級 | 154 | 3 | 157 | 154 | 154 | |
| | | Executive/Supervisory 行政/主任級 | 261 | 17 | 278 | 281 | 281 | |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 117 | 3 | 120 | 110 | 110 | |

Table 11.4B: Summary of Manpower Information by Sector by Scope by Job Level (Passenger Transport)
表 11.4B：客運 - 人力資料摘要（按業務界別、範疇及職級劃分）

| Sector 界別 | Scope 職責範疇 | Job Level 工作職級 | No. of Employees 僱員人數 (A) | No. of Vacancies 空缺額 (B) | Manpower in 2018 2018年總人力 (A+B) | Manpower Forecast in 2019 2019年人力預測 | Manpower Forecast in 2020 2020年人力預測 |
|---|---|--|---------------------------------|--------------------------------|---------------------------------------|---|---|
| Air Transport 空運 | Sub-total 小計 | Managerial 經理級 | 5 959 | 217 | 6 176 | 6 174 | 6 169 |
| | | Executive/Supervisory 行政/主任級 | 7 608 | 356 | 7 964 | 7 964 | 7 965 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 12 254 | 562 | 12 816 | 12 904 | 12 904 |
| Sea Transport 海運 | Business Management, Strategic Planning 業務管理、計劃策略 | Managerial 經理級 | 52 | 1 | 53 | 53 | 53 |
| | | Executive/Supervisory 行政/主任級 | 37 | 2 | 39 | 39 | 39 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 43 | 2 | 45 | 45 | 45 |
| | Fleet Operation and Management 航隊營運及管理 | Managerial 經理級 | 19 | 0 | 19 | 19 | 19 |
| | | Executive/Supervisory 行政/主任級 | 39 | 6 | 45 | 45 | 45 |
| | Sales & Customer Service 市場銷售及顧客服務 | Clerical/Craftsman/Operative 文員/技工/操作工級 | 62 | 3 | 65 | 67 | 67 |
| | | | 70 | 0 | 70 | 70 | 70 |
| | | Executive/Supervisory 行政/主任級 | 44 | 0 | 44 | 44 | 44 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 16 | 2 | 18 | 18 | 18 |
| | | Managerial 經理級 | 8 | 0 | 8 | 8 | 8 |
| Frontline Passenger Operation 乘客運輸、前線操作 | Executive/Supervisory 行政/主任級 | 51 | 2 | 53 | 53 | 53 | |
| | | 242 | 4 | 246 | 249 | 254 | |

Table 11.4B: Summary of Manpower Information by Sector by Scope by Job Level (Passenger Transport)
表 11.4B：客運 - 人力資料摘要（按業務界別、範疇及職級劃分）

| Sector 界別 | Scope 職責範疇 | Job Level 工作職級 | No. of Employees 僱員人數 (A) | No. of Vacancies 空缺額 (B) | Manpower in 2018 2018年總人力 (A+B) | Manpower Forecast in 2019 2019年人力預測 | Manpower Forecast in 2020 2020年人力預測 | |
|-------------------------|---|--|--|--------------------------------|---------------------------------------|---|---|-----|
| Sea Transport 海運 | Technical/Engineering Support 機械/技術支援 | Managerial 經理級 | 18 | 0 | 18 | 18 | 18 | |
| | | Executive/Supervisory 行政/主任級 | 23 | 0 | 23 | 23 | 23 | |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 204 | 2 | 206 | 205 | 206 | |
| | | Managerial 經理級 | 167 | 1 | 168 | 168 | 168 | |
| Land Transport 陸運 | Sub-total 小計 | Executive/Supervisory 行政/主任級 | 194 | 10 | 204 | 204 | 204 | |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 567 | 13 | 580 | 584 | 590 | |
| | Business Management, Strategic Planning 業務管理、計劃策略 | Managerial 經理級 | 271 | 12 | 283 | 290 | 293 | |
| | | Executive/Supervisory 行政/主任級 | 647 | 31 | 678 | 682 | 685 | |
| | Fleet Operation and Management 車隊營運及管理 | Clerical/Craftsman/Operative 文員/技工/操作工級 | 684 | 16 | 700 | 706 | 711 | |
| | | Managerial 經理級 | 80 | 6 | 86 | 84 | 84 | |
| | Sales & Customer Service 市場銷售及顧客服務 | | Executive/Supervisory 行政/主任級 | 125 | 10 | 135 | 145 | 146 |
| | | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 350 | 55 | 405 | 415 | 420 |
| | | | Managerial 經理級 | 73 | 6 | 79 | 78 | 78 |
| | | | Executive/Supervisory 行政/主任級 | 311 | 19 | 330 | 329 | 344 |
| | | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 493 | 30 | 523 | 524 | 535 |

Table 11.4B: Summary of Manpower Information by Sector by Scope by Job Level (Passenger Transport)
表 11.4B：客運 - 人力資料摘要（按業務界別、範疇及職級劃分）

| Sector 界別 | Scope 職責範疇 | Job Level 工作職級 | No. of Employees 僱員人數 (A) | No. of Vacancies 空缺額 (B) | Manpower in 2018 2018年總人力 (A+B) | Manpower Forecast in 2019 2019年人力預測 | Manpower Forecast in 2020 2020年人力預測 |
|-------------------------|---|--|---------------------------------|--------------------------------|---------------------------------------|---|---|
| Land Transport 陸運 | Passenger Frontline Operation 乘客運輸、前線操作 | Managerial 經理級 | 603 | 31 | 634 | 634 | 635 |
| | | Executive/Supervisory 行政/主任級 | 3 369 | 181 | 3 550 | 3 568 | 3 580 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 21 853 | 1 193 | 23 046 | 23 272 | 23 362 |
| | Technical/Engineering Support 機械/技術支援 | Managerial 經理級 | 584 | 30 | 614 | 614 | 614 |
| | | Executive/Supervisory 行政/主任級 | 3 032 | 148 | 3 180 | 3 176 | 3 178 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 4 655 | 146 | 4 801 | 4 804 | 4 806 |
| Overall 總數 | Sub-total 小計 | Managerial 經理級 | 1 611 | 85 | 1 696 | 1 700 | 1 704 |
| | | Executive/Supervisory 行政/主任級 | 7 484 | 389 | 7 873 | 7 900 | 7 933 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 28 035 | 1 440 | 29 475 | 29 721 | 29 834 |
| Overall 總數 | Total 總計 | Managerial 經理級 | 7 737 | 303 | 8 040 | 8 042 | 8 041 |
| | | Executive/Supervisory 行政/主任級 | 15 286 | 755 | 16 041 | 16 068 | 16 102 |
| | | Clerical/Craftsman/Operative 文員/技工/操作工級 | 40 856 | 2 015 | 42 871 | 43 209 | 43 328 |
| | | | 63 879 | 3 073 | 66 952 | 67 319 | 67 471 |

Note: The number of employees presented in the above table does not include the 40,000 taxi drivers and 10,600 Public Light Bus drivers (information obtained through the Motor Transport Workers General Union)

註：40,000 名的士司機及 10,600 名公共小巴司機（資料由汽車交通運輸業總工會提供）不包括在上表的僱員人數內

Table 11.5: Number of Employees Left in the Past 12 Months by Branch
表 11.5：過去 12 個月離職僱員人數（按門類劃分）

| Branch 門類 | Whereabouts 去向 | | | Overall 所有去向 總數 |
|---|---|---|------------------|-----------------------|
| | Taking up/starting own business in freight/passenger transport related jobs 繼續於運輸及物流業任職/ 創業 | Not taking up freight/ passenger transport related jobs (e.g. Taking up/starting own business in non- transport logistics related jobs, emigration, retirement or further studies) 並無繼續於運輸及物流業任職 (例如：於其他行業任職/創業、移民、 退休或進修) | Unknown 不知道去向 | |
| Freight Transport 貨運 | | | | |
| Warehousing & Cold Storage 貨倉及冷藏庫 | 951 | 67 | 598 | 1 616 |
| Cargo Handling Terminals 貨運站 | 22 | 77 | 70 | 169 |
| Trucking & Container Haulage 貨車及貨櫃運輸 | 1 470 | 454 | 7 594 | 9 518 |
| Air Freight Transport 空運承運 | 170 | 88 | 2 243 | 2 501 |
| Forwarding Agent 貨運代理 | 513 | 275 | 2 816 | 3 604 |
| Stevedoring Services 船上/碼頭裝卸貨物 | 6 | 2 | 23 | 31 |
| Couriers (International) 國際速遞 | 108 | 52 | 515 | 675 |
| Sea Freight Transport 海運承運 | 128 | 46 | 340 | 514 |

Table 11.5: Number of Employees Left in the Past 12 Months by Branch
表 11.5：過去 12 個月離職僱員人數（按門類劃分）

| Branch 門類 | Whereabouts 去向 | | | Overall 所有去向 總數 |
|--|---|---|------------------|-----------------------|
| | Taking up/starting own business in freight/passenger transport related jobs 繼續於運輸及物流業任職/ 創業 | Not taking up freight/ passenger transport related jobs (e.g. Taking up/starting own business in non- transport logistics related jobs, emigration, retirement or further studies) 並無繼續於運輸及物流業任職 (例如：於其他行業任職/創業、移民、 退休或進修) | Unknown 不知道去向 | |
| Ship Management & Chartering 船舶管理及租賃 | 6 | 13 | 51 | 70 |
| Other Transport Logistics Service Providers 其他物流服務經營者 | 36 | 21 | 16 | 73 |
| Passenger Transport 客運 | | | | |
| Vehicle and Rail Operators 車輛及鐵路客運經營者 | 403 | 264 | 2 059 | 2 726 |
| Vessel Transport Operators 水上客運經營者 | 36 | 34 | 28 | 98 |
| Aviation Service Operators 航空客運經營者 | 143 | 102 | 1 073 | 1 318 |
| Total 總計 | 3 992 | 1 495 | 17 426 | 22 913 |

Table 11.6: Employees Recruited in the Past 12 Months by Branch
表 11.6：過去 12 個月招聘僱員人數（按門類劃分）

| Branch 門類 | Source/Origin 來源 | | | | Overall 所有來源總數 |
|---|---|---|--|--------------|-------------------|
| | Recruited from other transport and logistics establishments 受聘者來自其他運輸及物流機 構 | Recruited from non- transport and logistics establishments 受聘者來自非運輸及物 流機構 | Recruited new graduates studied transport and logistics programmes at education/training institutions 受聘者剛於院校或培訓機構修畢運輸及物 流課程 | Others 其他 | |
| Freight Transport 貨運 | | | | | |
| Warehousing & Cold Storage 貨倉及冷藏庫 | 1 062 | 102 | 31 | 151 | 1 346 |
| Cargo Handling Terminals 貨運站 | 36 | 30 | 22 | 3 | 91 |
| Trucking & Container Haulage 貨車及貨櫃運輸 | 6 622 | 913 | 17 | 50 | 7 602 |
| Air Freight Transport 空運承運 | 946 | 244 | 34 | 983 | 2 207 |
| Forwarding Agent 貨運代理 | 1 506 | 844 | 46 | 109 | 2 505 |
| Stevedoring Services 船上／碼頭裝卸貨物 | 6 | 1 | 0 | 10 | 17 |
| Couriers (International) 國際速遞 | 215 | 327 | 36 | 23 | 601 |
| Sea Freight Transport 海運承運 | 146 | 245 | 28 | 64 | 483 |
| Ship Management & Chartering 船舶管理及租賃 | 42 | 9 | 8 | 0 | 59 |

| Branch 門類 | Source/Origin 來源 | | | | Overall 所有來源總數 |
|---|---|---|--|--------------|-------------------|
| | Recruited from other transport and logistics establishments 受聘者來自其他運輸及物流機 構 | Recruited from non- transport and logistics establishments 受聘者來自非運輸及物 流機構 | Recruited new graduates studied transport and logistics programmes at education/training institutions 受聘者剛於院校或培訓機構修畢運輸及物 流課程 | Others 其他 | |
| Other Transport Logistics Service Providers 其他物流服務經營者 | 44 | 30 | 0 | 10 | 84 |
| Passenger Transport 客運 | | | | | |
| Vehicle and Rail Operators 車輛及鐵路客運經營者 | 1 520 | 1 224 | 41 | 1 200 | 3 985 |
| Vessel Transport Operators 水上客運經營者 | 32 | 32 | 14 | 0 | 78 |
| Aviation Service Operators 航空客運經營者 | 334 | 16 | 7 | 811 | 1 168 |
| Total 總數 | 12 511 | 4 017 | 284 | 3 414 | 20 226 |

Methodology of Labour Market Analysis

Methodology

1. The Labour Market Analysis (LMA) approach first examines a group of key statistical data collected by a reliable and independent authority that reflect important changes in the local economy, demography and labour market. It then selects some of the data as independent variables and builds a statistical model that can be used to project manpower demand in the economic sector under study. In other words, the model makes use of some relevant and reliable economic indicators to project manpower demand in the short and medium term.

2. The LMA approach has been applied to the Transport and Logistics Industry since 2002. The building of a statistical model comprises two main steps. The first step is called 'Diagnostic' as two sets of statistical data are tested to select determinants. Set I comprises 9 core statistics in National Accounts (e.g. Gross Domestic Products (GDP) and its components) of Hong Kong. These statistics provide information about the key economic activities. Set II comprises 42 economic indicators with more disaggregate information about the economy. Such information includes consumption, investment, trade, tourism, property and related activities, and information about the labour market, etc. From these two sets of data, some determinants can be found. To minimize Types I & II errors, these determinants are statistically tested for multi-collinearity before they are grouped into Principal Components (PCs). The second step of statistical modelling is called 'Prognostic' as these principal components are used to build and maintain the statistical models for manpower projection.

Manpower Projection in the Transport and Logistics Industry

3. In the Transport and Logistics industry, 7 determinants have been identified from the pool of economic indicators. The manpower requirements in the Transport and Logistics industry can thus be explained by grouping these determinants into Principal Components (PC).

- 1) Exports of Services (Transportation) [*XERT*],
- 2) Total exports of services (HK\$ millions) [*XSER*],
- 3) Re-exports of goods in value index [*VREX*],
- 4) Re-exports of goods in unit value index [*UVREX*],
- 5) Imports of goods in value index [*VM*],
- 6) Imports of goods in unit value index [*UVM*],
- 7) Imports of goods in quantum index [*QM*],

4. At the ‘Diagnostic’ step, Principal Component Analysis (PCA) has been used to select determinants, called Principal Components (PCs), from the two original sets of economic indicators. It is found that about 95% of the total variation can be explained by these PCs and thus they can be safely used to project the manpower requirements in the near future. For the Transport and Logistics industry, the PCs comprise *XERT*, *XSER*, *VREX*, *UVREX*, *VM*, *UVM* and *QM*. At the ‘Prognostic’ step, linear regression technique is then applied to build the statistical model. The model indicates that there is a strong positive correlation between manpower and the PCs. The adjusted R-square worked out to be 0.9873, indicating that about 99% of the variation of the manpower requirements can be explained by the PCs at the 95% confidence level.

5. The manpower demand of freight transport for Transport and Logistics Industry in 2019-2022 is projected using two methods, namely Labour Market Analysis (LMA) and Employers’ Forecast (EF). A summary table is provided as below.

| Year | Actual Manpower | Projected Manpower (LMA) | Employer’s Forecast (EF) |
|--------------|---|---------------------------------|---------------------------------|
| 2018 | 113,509 | - | - |
| 2019F | - | 113,459 (-0.04%)* | 114,357 (0.75%)* |
| 2020F | - | 114,114 (0.58%)** | 114,623 (0.23%)** |
| 2021F | - | 114,755 (0.56%)** | - |
| 2022F | - | 115,386 (0.55%)** | - |
| * | as percentage change vs actual manpower in 2018 | | |
| ** | as percentage change vs projected manpower in previous year | | |

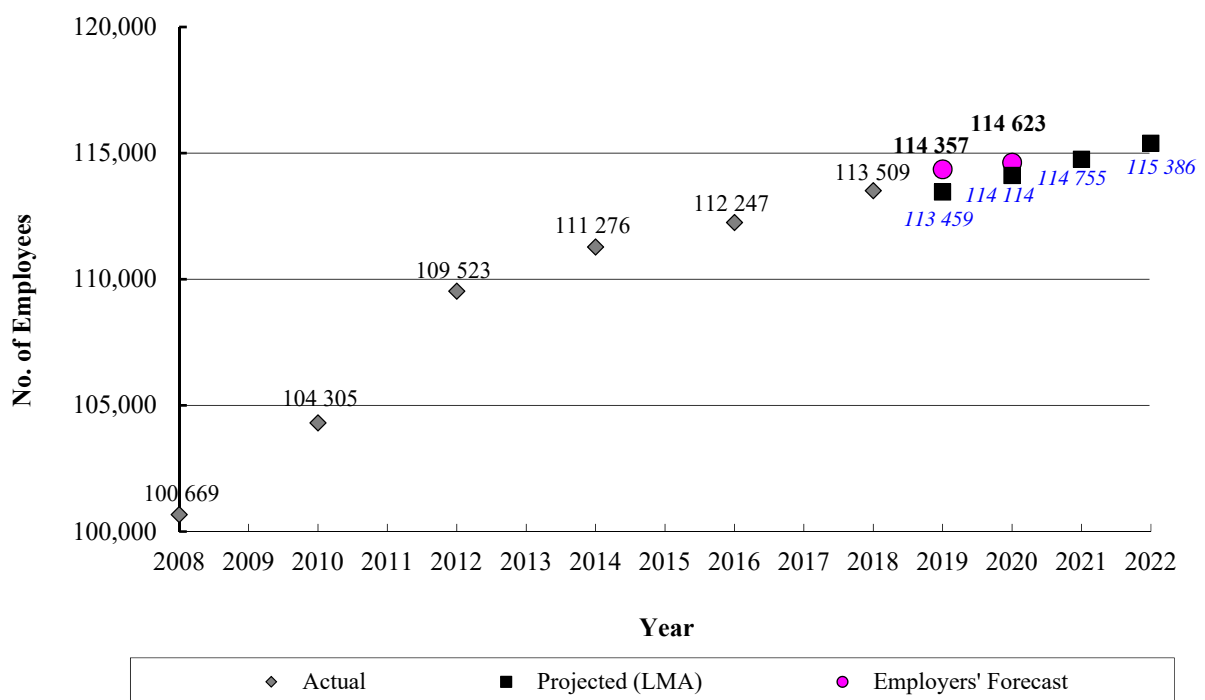
6. The manpower demand of passenger transport for Transport and Logistics Industry in 2019-2020 is projected based on Employers’ Forecast (EF) due to the lack of historical data. A summary table is provided as below.

| Year | Actual Manpower | Employer’s Forecast (EF) | Annual Growth |
|--------------|------------------------|---------------------------------|----------------------|
| 2018 | 66,952 | - | - |
| 2019F | - | 67,319 | 0.55% |
| 2020F | - | 67,471 | 0.23% |

Remark: Figures exclude 50,600 taxi & public light bus drivers

7. Figure below summarises the manpower projection of freight transport. LMA illustrates that the manpower will remain stable from 2018 to 2019 and then there will be a slightly upward trend from 2019 to 2022. The LMA approach has the advantages of objectivity and allows interim updates when economic indicators become available. The Employers' Forecast which is based on the respondents' industry experience and personal perception also shows a slightly upward trend from 2018 to 2019, which is very close to the projection by LMA. For estimation of annual training requirement, projection by LMA is adopted for freight transport in this survey. LMA is not applicable to passenger transport due to unavailability of historical data.

Figure: Summary of Manpower Projection of Freight Transport



人力市場分析推算方法

推算方法

根據「人力市場分析法」[Labour Market Analysis, 簡稱 LMA], 調查員首先研究一組由獨立可靠機構所收集得來的主要統計數據。這些數據可反映本地經濟、人口分布和人力市場的狀況, 其中部分數據經分析後選作獨立變數, 以便建立統計模型, 推算所研究經濟範疇的人力需求。換言之, 統計模型能運用可靠的相關主要經濟指標, 推算出中短期人力需求。

2. 運輸及物流業自 2002 年起一直採用人力市場分析法。建立統計模型包括兩個步驟。第一個步驟稱為「審斷」, 透過測試兩組統計數據, 挑選出獨立變數, 作為決定因子。第一組包括香港國民經濟核算中九個核心統計數字, 例如本地生產總值 [GDP] 及其組成數據, 提供有關香港主要經濟活動的資料。第二組包括 42 個經濟指標, 包括消費、投資、貿易、旅遊、房地產及相關活動, 以及勞動市場等不同經濟界別的相關資料。從這兩組數據中, 可找出一些決定因子。為減少第一、二組數據的誤差, 這些決定因子會經過統計測試, 找出它們的多重共線性, 再歸類為不同的「主要組成部分」[Principal Components, 簡稱 PCs]。第二個步驟稱為「預斷」, 即利用第一個步驟找出的 PCs 建立統計模型, 以推算人力。

運輸及物流業人力推算

3. 運輸及物流業已從一籃子經濟指標中選定 7 個決定因子, 並歸類為下列 PCs, 以便闡明人力需求:

- 1) 服務輸出 (運輸業) [XERT];
- 2) 服務出口總值 (港幣百萬元) [XSER];
- 3) 轉口貨值指數 [VREX];
- 4) 轉口貨物單位價格指數 [UVREX];
- 5) 進口貨物價格指數 [VM];
- 6) 進口貨物單位價格指數 [UVM];
- 7) 進口貨物貨量指數 [QM]。

4. 在「審斷」階段，本會採用「主要組成部分分析法」[Principal Component Analysis，簡稱 PCA]，從原先兩組經濟指標選出決定因子組成 PCs，結果發現，這些 PCs 可以解釋約 95% 的所有差異，故適用於推算未來數年的人力需求。運輸及物流業的 PCs 包括：服務輸出（運輸業）[XERT]、服務出口總值（港幣百萬元）[XSER]、轉口貨值指數 [VREX]、轉口貨物單位價格指數 [UVREX]、進口貨物價格指數 [VM]、進口貨物單位價格指數 [UVM] 以及進口貨物貨量指數 [QM]。在「預斷」階段，本會運用「線性迴歸法」[Linear Regression] 建立統計模型，結果顯示，實際人力數字與 PCs 之間存在明顯的「正向相關」關係。調整後的 R-平方值是 0.9873，顯示這些 PCs 可以解釋約 99% 的人力需求變化，可信程度為 95%。

5. 本會採用 LMA 以及僱主預測 [Employers' Forecast，簡稱 EF] 兩種方法，推算 2019 年至 2022 年間運輸及物流業在貨運方面的人力需求。摘要如下：

| 年份 | 實際人力 | 人力推算 [LMA] | 僱主預測 [EF] |
|---------|----------------------|----------------------|----------------------|
| 2018 | 113,509 | - | - |
| 2019 預測 | - | 113,459 (-0.04%)* | 114,357 (0.75%)* |
| 2020 預測 | - | 114,114 (0.58%)** | 114,623 (0.23%)** |
| 2021 預測 | - | 114,755 (0.56%)** | - |
| 2022 預測 | - | 115,386 (0.55%)** | - |
| * | 相對於 2018 年實際人力的百分率變化 | | |
| ** | 相對於上一年推算人力的百分率變化 | | |

6. 由於未有過往的數據，本會採用僱主預測 [Employers' Forecast，簡稱 EF] 的方法，推算 2019 年至 2020 年運輸及物流業在客運方面的人力需求。摘要如下：

| 年份 | 實際人力 | 僱主預測 (EF) | 每年增長 |
|---------|--------|-----------|-------|
| 2018 | 66,952 | - | - |
| 2019 預測 | - | 67,319 | 0.55% |
| 2020 預測 | - | 67,471 | 0.23% |

註：50,600 名的士及公共小巴司機不包括在數據之內

7. 下圖總結了貨運的人力預測。LMA 顯示從 2018 年到 2019 年的人力將保持穩定，然後從 2019 年到 2022 年將略有上升的趨勢。LMA 方法具有客觀性的優勢，並容許在經濟指標適用時進行中期更新。而根據受訪者的行業經驗和個人看法的僱主預測方法，也顯示 2018 年至 2019 年略有上升的趨勢，這與 LMA 的預測非常接近。為估算年度培訓需求，本次調查採用了 LMA 預測貨運人力，而由於客運欠缺相關歷史數據，所以 LMA 不適用於客運方面的人力預測。

圖：貨運人力推算摘要

