

**2023 Manpower Survey Report
Automobile Industry**

Automobile Training Board

Vocational Training Council

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Acknowledgement

The Automobile Training Board would like to express its gratitude to all respondents of the sampled establishments for providing information required by the survey.

1 Executive Summary

Background

1.1 The Automobile Training Board (Training Board) of the Vocational Training Council (VTC) conducted a manpower survey for the automobile industry from March to May 2023, with the data reference date on 1 March 2023. This report presents the survey findings of the latest manpower situation of the industry and proposes recommendations on the manpower demand and training needs to different stakeholders of the industry, including employers, employees, and training providers by making reference to the business outlook.

Survey Coverage and Methodology

1.2 The survey covered around 4 406 establishments in different branches of the industry. By adopting a stratified random sampling method for selecting establishments from the Central Register of Establishments of the Census and Statistics Department, and the inclusion of supplementary samples recommended by the Training Board, a total of 575 establishments were selected for the survey.

1.3 A pack of survey documents was given to each sampled establishment. The selected establishments were asked to complete a questionnaire, which comprised two parts. Part I collected quantitative manpower information by job levels and by principal jobs, and Part II collected supplementary information relating to the industry's manpower situation. The respondents were asked to provide manpower information of their establishments based on a list of principal jobs, which were defined by the Training Board with detailed job descriptions.

1.4 During the fieldwork period between March and May 2023, enumerators assisted the respondents in completing the questionnaire through phone calls or on-site visits. The data collection and enumeration processes were closely monitored and data was verified to ensure quality and accuracy. Among the 375 valid sampled establishments, 371 were successfully enumerated which contributed to an effective response rate of 98.9%¹.

¹ Sampled establishments which had ceased operation, not employed any automobile staff, etc. were classified as invalid samples.

Manpower Projection Methodology

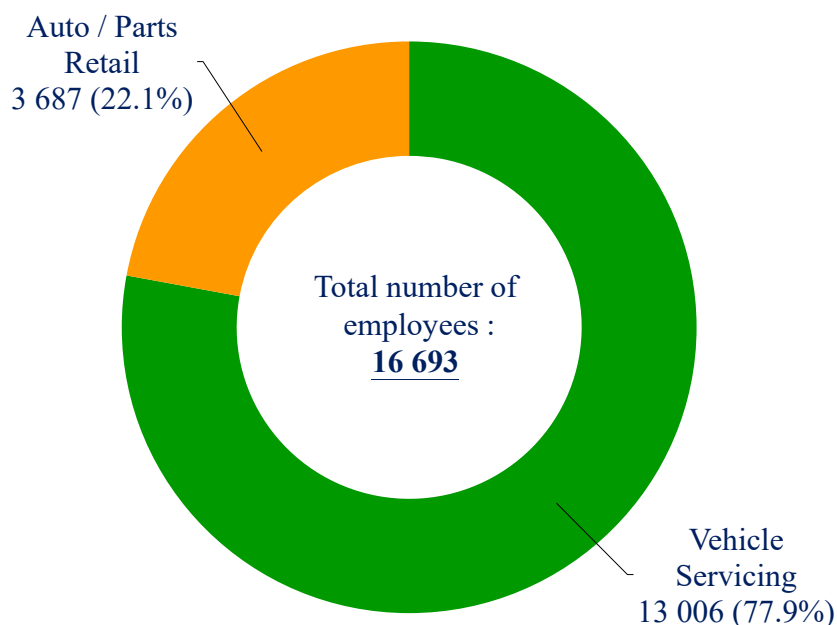
1.5 The Training Board adopts the approach of Adaptive Filtering Method (AFM) for projecting the manpower trend of the automobile industry for the period from 2024 to 2027. The method is compiled by taking into account the historical survey data. The details of methodology are shown in *Appendix 8*.

Findings

Overview of Manpower Situation

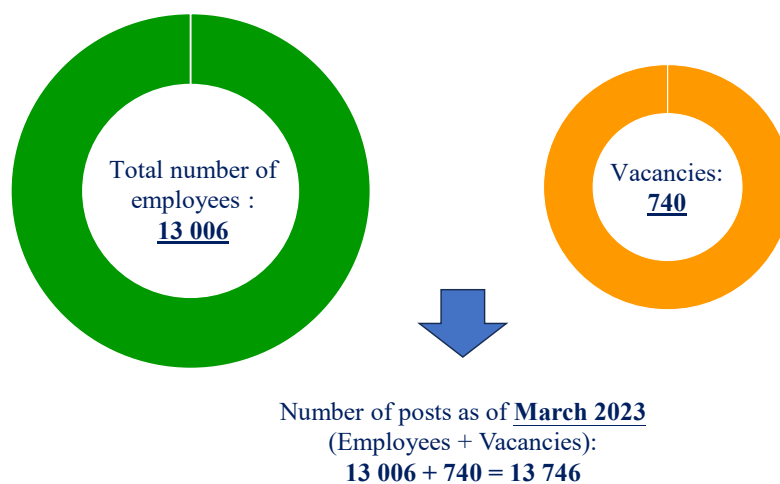
1.6 As at 1 March 2023 (i.e. the reference date of the survey), a total of 16 693 employees were engaged in the automobile industry, with 77.9% (13 006 employees) being engaged in the vehicle servicing sector and 22.1% (3 687 employees) in the auto/parts retail sector. (*Chart 1.1*)

Chart 1.1 Automobile employees by sector



1.7 In addition to the 13 006 employees, there were 582 trainees and 740 vacancies reported in the vehicle servicing sector as at 1 March 2023. Aggregating the 13 006 employees and 740 vacancies, there were a total of 13 746 posts. (*Chart 1.2*)

Chart 1.2 Overview of manpower situation in the vehicle servicing sector

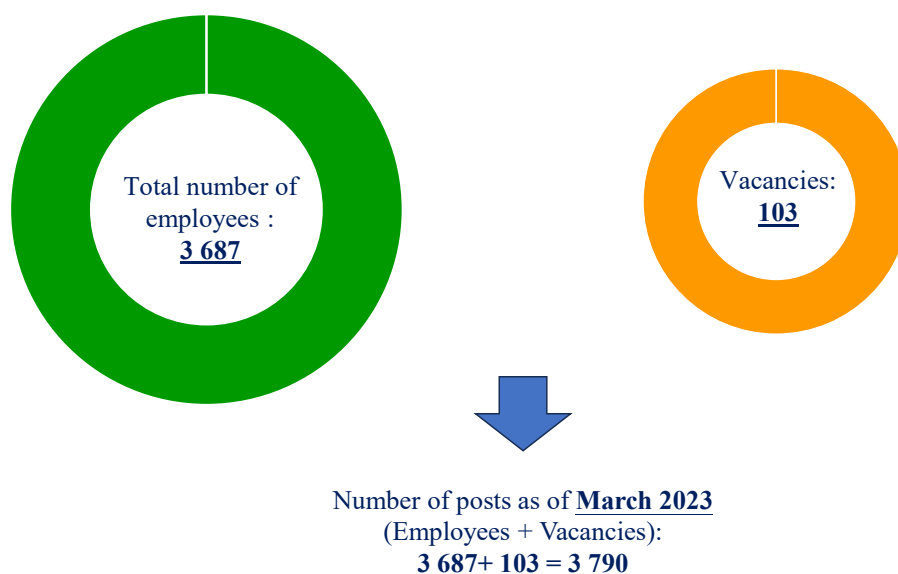


Number of trainees: 582

Note: “Vacancies” refer to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel as at survey reference date

1.8 As for the auto/parts retail sector, there were 103 vacancies reported as at 1 March 2023. Aggregating the 3 687 employees and 103 vacancies, there were a total of 3 790 posts. (Chart 1.3)

Chart 1.3 Overview of manpower situation in the auto/parts retail sector



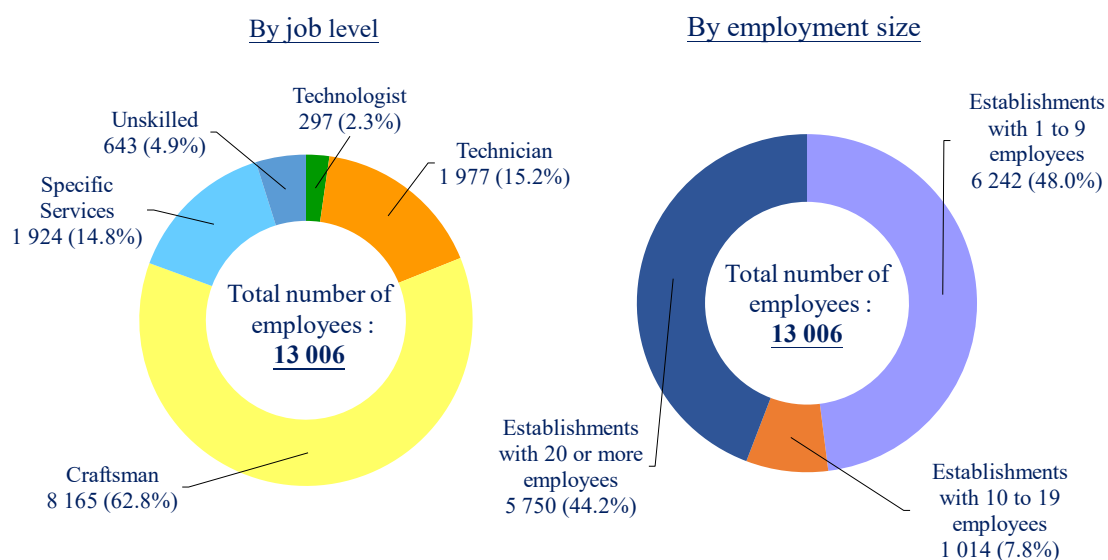
Note: “Vacancies” refer to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel as at survey reference date.

Employees

1.9 Among the 13 006 employees engaged in the vehicle servicing sector, over 60% were working at the craftsman level (62.8%; 8 165 employees), about 15% at the technician level (15.2%; 1 977 employees) or the specific services level (14.8%; 1 924 employees), and less than 5% at the unskilled level (4.9%; 643 employees) and the technologist level (2.3%; 297 employees) (*Chart 1.4*)

1.10 Analysed by employment size, over 40% of employees were working in establishments with 1 to 9 employees (48.0%; 6 242 employees) and establishments with 20 or more employees (44.2%; 5 750 employees). 7.8% of employees were working in establishments with 10 to 19 employees. (*Chart 1.4*)

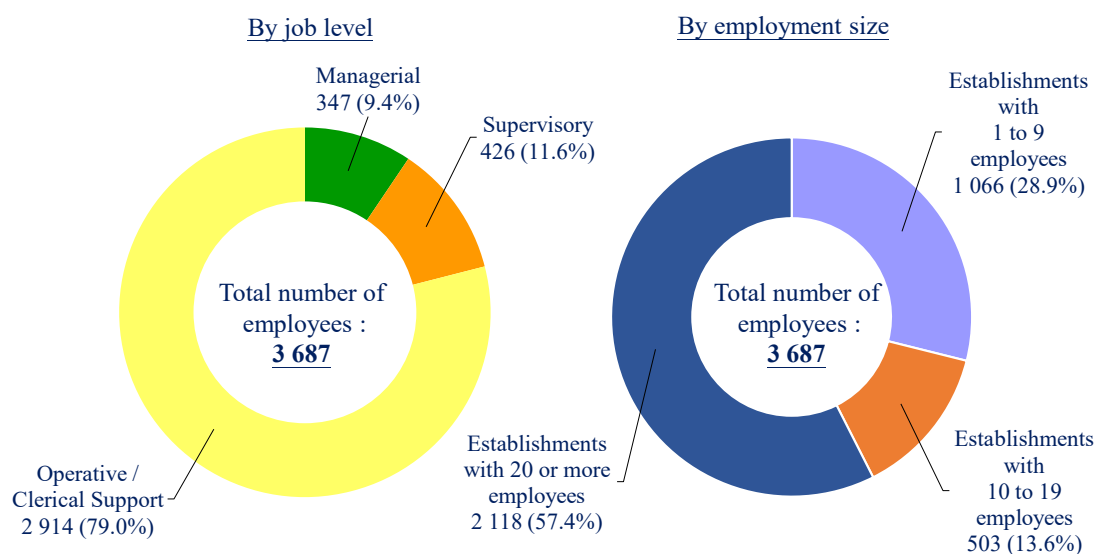
Chart 1.4 Employees by job level and employment size in the vehicle servicing sector



1.11 Among the 3 687 employees engaged in the auto/parts retail sector, nearly 80% of employees were working at the operative/clerical support level (79.0%; 2 914). 11.6% of employees (or 426 employees) were working at the supervisory level and 9.4% (or 347 employees) at the managerial level. (*Chart 1.5*)

1.12 Analysed by employment size, nearly 60% of employees were working in establishments with 20 or more employees (57.4%; 2 118 employees). Nearly 30% of employees were working in establishments with 1 to 9 employees (28.9%; 1 066 employees). 13.6% of employees were working in establishments with 10 to 19 employees. (*Chart 1.5*)

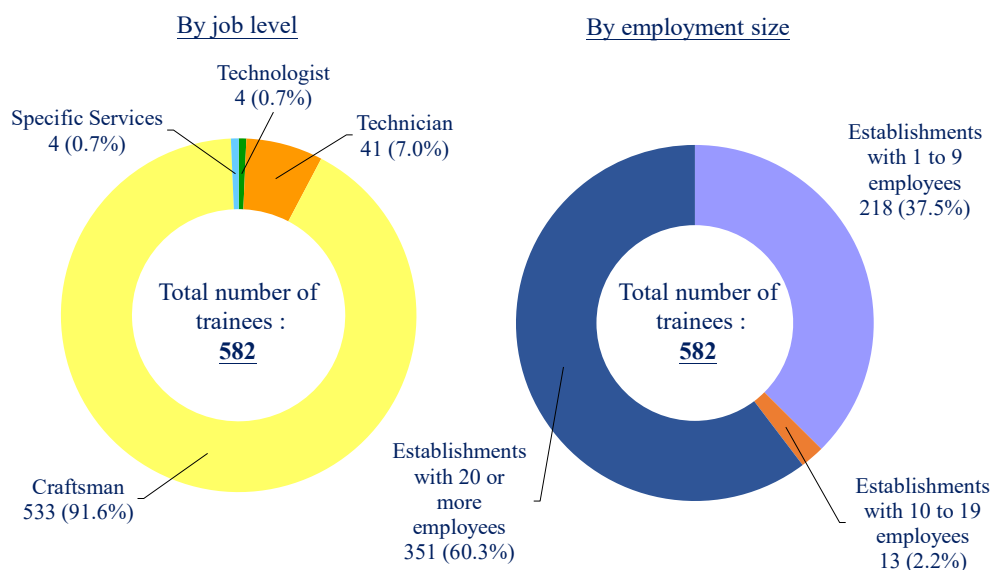
Chart 1.5 Employees by job level and employment size in the auto/parts retail sector



Trainees

1.13 As at 1 March 2023, there were 582 trainees in the vehicle servicing sector. Of these 582 trainees, over 90% were working at the craftsman level (91.6%; 533 trainees). Analysed by employment size, 60.3% were working in establishments with 20 or more employees whereas 37.5% in establishments with 1 to 9 employees. (Chart 1.6)

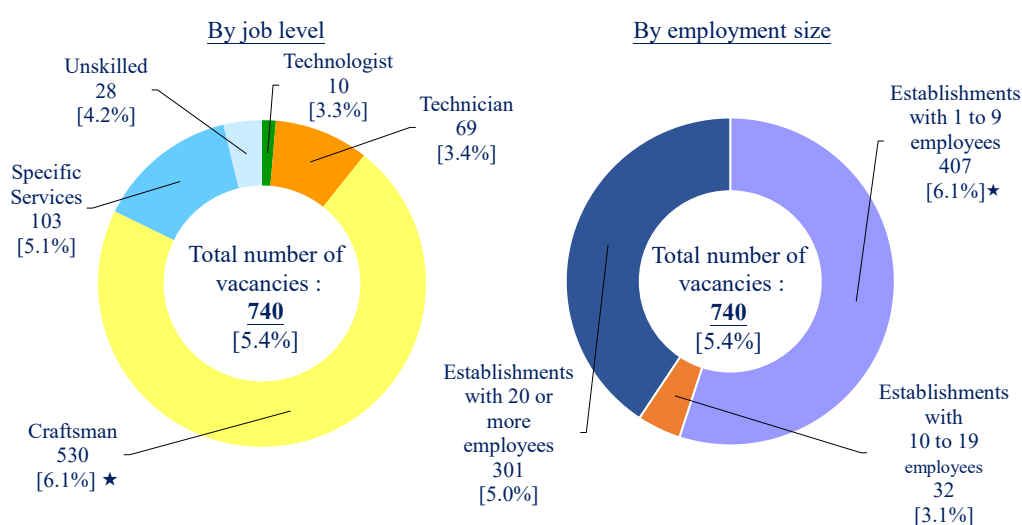
Chart 1.6 Trainees by job level and employment size in the vehicle servicing sector



Vacancies

1.14 As at 1 March 2023, a total of 740 vacancies were reported in the vehicle servicing sector, representing a vacancy rate of 5.4% (i.e. vacancies as a percentage of the total number of employees and vacancies). The majority of vacancies were jobs at the craftsman level (530 vacancies), followed by the specific services level (103 vacancies). Analysed by employment size, over half of vacancies were reported in establishments with 1 to 9 employees (407 vacancies), followed by establishments with 20 or more employees (301 vacancies). (Chart 1.7)

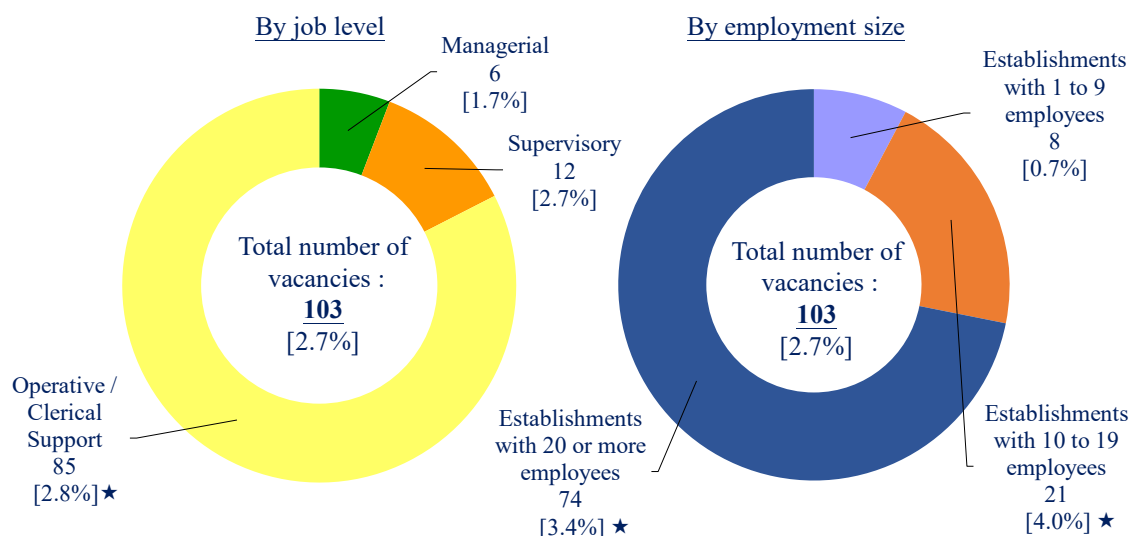
Chart 1.7 Vacancies by job level and employment size in the vehicle servicing sector



Notes: (1) Figures in [] brackets indicate the **Vacancy rate** = $\frac{\text{No. of vacancies}}{\text{No. of employees} + \text{No. of vacancies}}$
 (2) Figures marked with the symbol “★” refer to relatively higher vacancy rates than the overall rate.

1.15 As for the auto/parts retail sector, a total of 103 vacancies were reported as at 1 March 2023, representing a vacancy rate of 2.7%. The majority of vacancies were jobs at the operative/clerical support level (85 vacancies). Analysed by employment size, most of the vacancies were reported in establishments with 20 or more employees (74 vacancies). (Chart 1.8)

Chart 1.8 Vacancies by job level and employment size in the auto/parts retail sector



Notes: (1) Figures in [] brackets indicate the **Vacancy rate** = $\frac{\text{No. of vacancies}}{\text{No. of employees} + \text{No. of vacancies}}$
 (2) Figures marked with the symbol “★” refer to relatively higher vacancy rates than the overall rate.

Average Monthly income

1.16 The average monthly income for employees in the vehicle servicing sector at the technologist level was mainly in the range of \$35,001 or above (80.5%). It was followed by \$20,001 - \$35,000 for the technician level (73.4%), \$15,001 - \$25,000 for the craftsman level (94.8%), \$15,001 - \$25,000 for the specific services level (83.6%) and \$15,000 or below for the unskilled level (65.2%). (Table 1.1)

Table 1.1 Average monthly income by job level in the vehicle servicing sector

Job level	Prominent ranges of income
Technologist	\$35,001 - \$45,000 (38.4%)
	Above \$45,000 (42.1%)
Technician	\$20,001 - \$25,000 (30.2%)
	\$25,001 - \$35,000 (43.2%)
Craftsman	\$15,001 - \$20,000 (35.5%)
	\$20,001 - \$25,000 (59.3%)
Specific Services	\$15,001 - \$20,000 (50.5%)
	\$20,001 - \$25,000 (33.1%)
Unskilled	\$15,000 or below (65.2%)

1.17 In the auto/parts retail sector, the average monthly income for employees at the managerial level was mainly in the range of \$35,001 or above (75.3%). It was followed by \$20,001 - \$35,000 for the supervisory level (85.5%) and \$15,001 - \$25,000 for the operative/clerical support level (70.8%). (Table 1.2)

Table 1.2 Average monthly income by job level in the auto/parts retail sector

Job level	Prominent ranges of income
Managerial	\$35,001 - \$45,000 (44.4%)
	Above \$45,000 (30.9%)
Supervisory	\$20,001 - \$25,000 (53.7%)
	\$25,001 - \$35,000 (31.8%)
Operative / Clerical Support	\$15,001 - \$20,000 (34.7%)
	\$20,001 - \$25,000 (36.1%)

Manpower Projection and Annual Training Requirements

1.18 The annual additional manpower requirements have taken into account (i) projected manpower trend and (ii) wastage rate of the industry (i.e. percentage of employees leaving the industry permanently on an annual basis). A summary of estimated annual additional manpower requirements from 2024 to 2027 is shown in Table 1.3 below.

Table 1.3 Manpower Trend in 2024 – 2027

Vehicle Servicing

Job Level	Estimated Annual Additional Annual Manpower Requirement
Technologist ^	2
Technician ^	46
Craftsman and Specific Services	469

^ Based on the findings of the 2023 and previous rounds of manpower surveys, the business outlook of the sector, the impact of the COVID-19 pandemic, the Training Board decided to slightly adjust the weight factor (A) from the best-fitted curve of the AFM for the manpower projection at Technologist and Technician job levels for 2024 to 2027.

Auto / Parts Retail

Job Level	Estimated Annual Additional Annual Manpower Requirement
Managerial	5
Supervisory	55
Operative / Clerical Support	41

Business Outlook

1.19 The automobile industry in Hong Kong is characterised by unique challenges and a distinctive market landscape. The Training Board is cautiously optimistic about the prospect of the automobile industry. The following challenges and opportunities are worthy of note.

Challenges

Manpower Shortage

1.20 The labour force in Hong Kong has declined in recent years. According to the latest data published by the C&SD, the working population declined by 94 100 or 2.4% in 2022. As per the statistics² provided by the Transport Department, the total number of licensed vehicles in 2019 was 802 698 and the figure was increased to 820 882 as of March 2023. Regarding the manpower of the industry as mentioned in the section of findings, the total number of employees was 16 961 in 2019 and decreased to 16 693 in March 2023. Manpower shortage in the city means it will have a challenging time to support the continuous growth of the industry.

The Trend towards Decarbonisation

1.21 Carbon emissions from transport make up around 16% of the total emissions in Hong Kong. In order to aid in the reduction of waste and carbon emissions, the HKSAR Government has implemented various energy-saving and renewable energy measures, including the use of electric vehicles (EVs). On the other hand, the HKSAR Government has promulgated to cease new registrations of internal combustion engine (ICE) private cars, including hybrid vehicles by 2035, and set a timeline for the public to follow.

Advancement of Technology

1.22 For ICE vehicles, they have been equipped with advanced technologies, including complex electronic systems, sophisticated sensors, and connectivity features. This requires specialised knowledge and expertise to diagnose and repair these vehicles effectively. Automobile service centres need to invest in continuous training for technicians and upgrade diagnostic tools and equipment to meet the demands of newer ICE vehicle models. EVs, on the other hand, require some other skill sets. Maintaining a skilled workforce and staying up-to-date with evolving automotive technologies is a challenge for the vehicle servicing sector.

² Registration and Licensing of Vehicles by Class of Vehicles, Transport Department, 06/2023, https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.td.gov.hk%2Ffilemanager%2Fen%2Fcontent_4883%2Ftable41a.xls&wdOrigin=BROWSELINK

EV Infrastructure

1.23 According to the statistics³ of the Environmental Protection Department, the total number of EVs is 60 943, representing about 6.6% of the total number of vehicles as of June 2023. In March 2022, the number of newly registered EVs surpassed ICE private cars for the first time, and amounted to 5%⁴ of the total private cars registered. The growing popularity of EVs in Hong Kong presents infrastructure challenges. Establishing a robust charging infrastructure is essential to support widespread adoption of EVs. However, expanding the charging network across the city requires significant investment and coordination among various stakeholders. As soon as support facilities like charging stations for EVs could catch up, the public would actively consider replacing their vehicles with EVs.

Opportunities

A Period of Radical Change

1.24 There is a paradigm shift taking place in the automobile industry. In addition to electrification, vehicles in the future will be connected and autonomous. The industry will have to switch its focus from production and technical product to intelligent mobility and enhanced customer experience. There are a number of factors driving industry disruption, including time savings, increased efficiency, cost reductions, and reduced environmental impact.

Development of a Smart City

1.25 Increasing number of charging facilities, especially fast charging piles, would meet the growing needs of EV drivers and encourage the switch to EVs. It will also reduce the queues for charging EVs. Hong Kong is moving towards a smart city. Intelligent infrastructure and new communication technologies would enable people to enjoy a more convenient and safe travel experience. Hong Kong's emphasis on smart city initiatives opens opportunities for companies to develop and integrate connected car technologies. This includes features like vehicle-to-infrastructure communication, real-time data connectivity, and advanced navigation systems. Implementing these technologies can enhance the driving experience, improve efficiency, and provide value-added services to customers.

³ https://www.epd.gov.hk/epd/english/environmentinhk/air/promotion_ev/promotion_ev.html#Measure

⁴ Transport Department, First Registration of Private Cars by Make, First Registration Vehicle Status, Fuel Type and Body Type, March 2022
https://www.td.gov.hk/filemanager/en/content_5149/table41e.pdf

Autonomous Driving

1.26 While autonomous vehicles are still in the early stages of development, there is potential for local companies to explore autonomous driving technology and its applications in Hong Kong. This could involve partnerships with local research institutes, Government Departments, Mainland companies to test and deploy autonomous vehicles in controlled environments. Investing in research and development, collaborating with technology providers, and addressing regulatory challenges can be the key to unlocking the opportunities presented by autonomous vehicles.

Aftermarket Services and Maintenance

1.27 As the number of vehicles on the road increases, there is a corresponding demand for maintenance, repair, and customisation services. Companies can tap into this opportunity by providing customer-oriented aftermarket services such as vehicle servicing, spare parts supply, and vehicle customisation. Establishing service centers equipped with advanced diagnostics and repair technologies can ensure efficient and reliable services. Additionally, offering personalised customisation options can cater for the preferences of vehicle owners who seek unique and distinct features for their vehicles.

Charging Infrastructure Development

1.28 With the increasing popularity of electric vehicles, there is a need for a comprehensive and convenient charging infrastructure network. Previously, the HKSAR Government arranged a pilot subsidy scheme to promote installation of EV charging-enabling infrastructure (EVCEI) in car parks of existing private residential buildings. On the other hand, companies can seize the opportunity by investing in the development and installation of EV charging stations across the city. This includes both public charging stations in parking lots, shopping centers, and other public spaces, as well as private charging solutions for residential and commercial buildings. Offering fast-charging solutions and exploring innovative charging technologies can provide a competitive edge in the market.

New Energy Commercial Vehicles

1.29 With the growth of e-commerce and the increasing emphasis on sustainability, there is a need for green logistics solutions in Hong Kong. Companies can explore opportunities to provide electric or hydrogen fuel cell commercial vehicles for last-mile deliveries. For passenger transport, there are approximately 7,000 franchised public buses and 18,000 taxis in Hong Kong. Given land scarcity in Hong Kong and the long refueling time for the long-travelled vehicles, it is a challenge to locate sufficient and proper sites for charging facilities to

support commercial vehicles if they are all EVs. In addition, the charging time for commercial vehicles could take very long, not to mention the short running distance after charging. Hence, other energy sources are being explored, such as hydrogen fuel cell technology, that a refill can be completed in minutes.

Recommendations

Based on the business outlook, and manpower supply and demand situation derived from the survey findings, the Training Board recommends the following measures to all major stakeholders to meet the industry's manpower demand.

Government

1.30 The HKSAR Government should continue providing financial incentives, such as subsidies and tax credits, to promote the adoption of EVs. Additionally, the Government should continue encouraging fleet electrification of electric commercial vehicles. For charging infrastructure development, the Government can take the lead to invest in the expansion of charging infrastructure throughout the city. This includes increasing the number of public charging stations in strategic locations and collaboration with private entities to install charging stations in commercial buildings, hotels, and other high-traffic areas.

1.31 To allocate resources and funding for research and development in the automobile industry, particularly in areas such as EV technology, autonomous driving, and connected car solutions are worthy of consideration by the Government. The Government should also ensure that regulations are conducive to the development and growth of the automobile industry while maintaining safety and environmental standards. Public awareness campaigns can be arranged to educate citizens about the benefits of new energy vehicles, sustainable transportation, and the role of the automobile industry in reducing carbon emissions.

Training Institutions

1.32 Training institutes should provide students with industrial attachment opportunities during their studies in order to expose them to contemporary operations and practices in the automobile industry. Industry professionals should be encouraged to participate in guest lectures, workshops, and mentoring programmes to bridge the gap between the academia and industry.

1.33 Institutions should also provide different levels of pre-employment training programmes from which students with varying academic achievements can pick. Aside from

graduates of the Hong Kong Diploma of Secondary Education (HKDSE) Examination, who are likely to pursue higher diploma programs at Qualifications Framework (QF) level 4, some F.3 secondary school leavers may want to pursue a valuable pathway for continued studies and career development. In this regard, relevant QF level 3 programmes with adequate entry standards and curriculum should be strengthened to meet the needs. To continuously upskill automobile industry practitioners, training institutions should provide trainees with learning opportunities to satisfy various learning goals and in turn would support business growth of organisations. These programmes, including bite-sized ones, can focus on upskilling and reskilling practitioners in areas such as EV maintenance and repair, advanced diagnostics, and emerging automotive technologies.

Industry and Employers

1.34 The automobile industry is experiencing the influence of technology that are reshaping its landscape. To stay ahead of the competition, industry operators must keep an eye on the newest technological developments, including but not limited to AI, data analytics, IoT, EV technology, advanced diagnostics, etc. In order to promote apprenticeship training and enhance the skills in vehicle maintenance, repairing, and car painting, the AUTB has been organising the Best Apprentice Competition (BAC) since 1986. The BAC not only draws the interest of employers and apprentices in quality training, but it also assists in publicising the vehicle service trades through various channels such as press releases, media interviews, and highlight videos on YouTube.

1.35 Employer support plays a crucial role in facilitating students' transition from study to work by cultivating their collaboration spirit, problem-solving skills, practical skills, and appropriate work attitudes and values. Students can gain real-world exposure through industrial attachment opportunities. On the other hand, the Business-School Partnership Programme (BSPP) is a good channel to promote to secondary school students. Students will be able to learn about the various major duties in the automobile industry, understand the requirements of employers, improve soft skills, and build an appropriate work attitude and values through activities provided by the business sector, such as company tours and career talks. Employers can foster diversity and inclusion within their organisations by implementing policies that promote equal opportunities and representation. By creating an inclusive work environment with the participation of women, ethnic minority and individuals with diverse backgrounds, employers can attract a diverse talent pool and benefit from a variety of perspectives and ideas.

Employees

1.36 Employee competency and engagement increase as a result of upskilling. It can

also contribute to increased productivity, as well as a higher level of job satisfaction. As a result, practitioners in the automobile industry are highly encouraged to engage in active learning and skill development. This gives employees a sense of progression and development, making their jobs more fulfilling and challenging. This, in turn, will aid in the retention of industry talent.

1.37 To encourage young people to join the apprenticeship scheme for industries with strong manpower demand, the VTC Earn & Learn Scheme was introduced through tripartite collaborations among employers, the Government and the VTC. It provides clear academic and career pathways for youngsters such that they could earn an attractive salary while concurrently receiving on-the-job training. To further enhance the effectiveness of the VTC Earn & Learn Scheme, the VTC has launched the Pilot Incentive Scheme to Employers (PISE) with the support of the Government. PISE offers incentives for employers who provide trainees with workplace learning and assessment under the VTC Earn & Learn Scheme, through which trainees can hone their knowledge and professional skills to meet the specific needs and new opportunities of the industries.

2 Introduction

Background

2.1 The Automobile Training Board (Training Board) of the Vocational Training Council (VTC) is appointed by the Government of the Hong Kong Special Administrative Region (HKSAR) to analyse the manpower situation and training needs of the automobile industry. The Training Board comprises members nominated by major trade associations, trade unions, professional bodies, educational and training institutions, and Government Departments. The Working Party on Manpower Survey is formed by selected members of the Training Board. The membership and terms of reference of the Training Board, as well as the members in the Working Party are listed in **Appendices 1, 2 and 3**.

2.2 The manpower survey of the automobile industry is conducted every four years, followed by two periodic manpower updates supplemented with information collected from focus groups and desk research to better reflect the changing trends of the manpower situation. This manpower survey mainly focused on analysis of technical manpower, which refers to the personnel who are expected to apply the industrial knowledge and technical skills required to complete the work assigned.

2.3 Manpower data with respect to the survey reference date on 1 March 2023 was collected from March to May 2023. This report presents the survey findings and analysis of the latest manpower situation of the automobile industry and proposes recommendations on the manpower development to the different stakeholders of the industry, including employers, employees, and training providers by referring to the business outlook.

Objectives

2.4 The objectives of this manpower survey are:

- (a) To collect up-to-date manpower information by industry sectors, job levels and principal jobs in the industry;
- (b) To assess the technical manpower structure;
- (c) To forecast the training requirements in the near future; and
- (d) To recommend to the VTC and relevant stakeholders the talent development strategies to meet the manpower needs.

Survey Coverage

2.5 The survey covered the following sectors and branches in the industry:

- Vehicle Servicing Sector
 - Body assembly of motor vehicles
 - Servicing and repairing of motor vehicles and motorcycles
 - Supplementary samples (servicing and repairing of motor vehicles and motorcycles)

- Auto/Parts Retail Sector
 - Retail sale of motor vehicles
 - Retail sale of motorcycles
 - Retail sale of motor vehicle and motorcycle parts and accessories
 - Supplementary samples (retail sales of motor vehicles and motorcycles, parts and accessories of motor vehicles and motorcycles)

- Other Prominent or Relevant Organisations Employing Workers of Automobile Industry

3 Methodology

Sample Design

3.1 Based on the Hong Kong Standard Industrial Classification list from the Census and Statistics Department (C&SD) of the HKSAR Government, the survey covered around 4 406 establishments in different branches of the industry. By adopting the stratified random sampling method for selecting establishments from the Central Register of Establishment of the C&SD and the inclusion of supplementary samples recommended by the Training Board, a total of 575 establishments were selected for the survey.

Questionnaire Design

3.2 The questionnaire designed for the survey comprised two parts. Part I collected quantitative manpower information by job levels and by principal jobs, and Part II collected supplementary information related to the industry's manpower situation. The list of principal jobs was defined by the Training Board with detailed job descriptions given for each job, and was classified into different job levels as follows:

Vehicle Servicing Sector	Auto/Parts Retail Sector
(i) Technologist	(i) Managerial
(ii) Technician	(ii) Supervisory
(iii) Craftsman	(iii) Operative/Clerical Support
(iv) Specific Services	
(v) Unskilled	

3.3 While job titles adopted in the establishments might vary with the descriptions of the principal jobs, respondents were asked to provide manpower information corresponding to the job descriptions and the skill levels of the principal jobs. The definition of terms and the survey documents including a sample questionnaire, explanatory notes and job descriptions for the principal jobs are given in **Appendices 4 and 5**.

Data Collection

3.4 Data collection was carried out between March and May 2023. A pack of survey documents was given to each sampled establishment. The respondents of the establishments were asked to provide manpower information of their establishments at the time of the survey with the reference date on 1 March 2023. During the fieldwork period, enumerators assisted the respondents in completing the questionnaire through phone calls or on-site visits.

3.5 Various measures were taken to assure the quality of the data collection process. 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 and verification of the collected data. The list of quality control measures is shown in **Appendix 6**.

Data Analysis

3.6 Among the 375 valid sampled establishments, 371 were successfully enumerated which contributed to an effective response rate of 98.9%⁵. Considering the satisfactory response rate of individual branches, the satisfactory response rate from a majority of prominent and sizeable establishments, and the grossing-up of the sample results based on the statistically-grounded method, it could be concluded that the survey findings presented in this report contributed to a significant level of representativeness of the automobile industry. The response rate achieved for individual branches was also adequate to produce a meaningful breakdown by branch. The response profile is shown in **Appendix 7**.

Manpower Projection Methodology

3.7 The Training Board adopts the approach of Adaptive Filtering Method (AFM) for projecting the manpower trend of the automobile industry for the period from 2024 to 2027. The method is compiled by taking into account the historical survey data. The details of methodology are shown in **Appendix 8**.

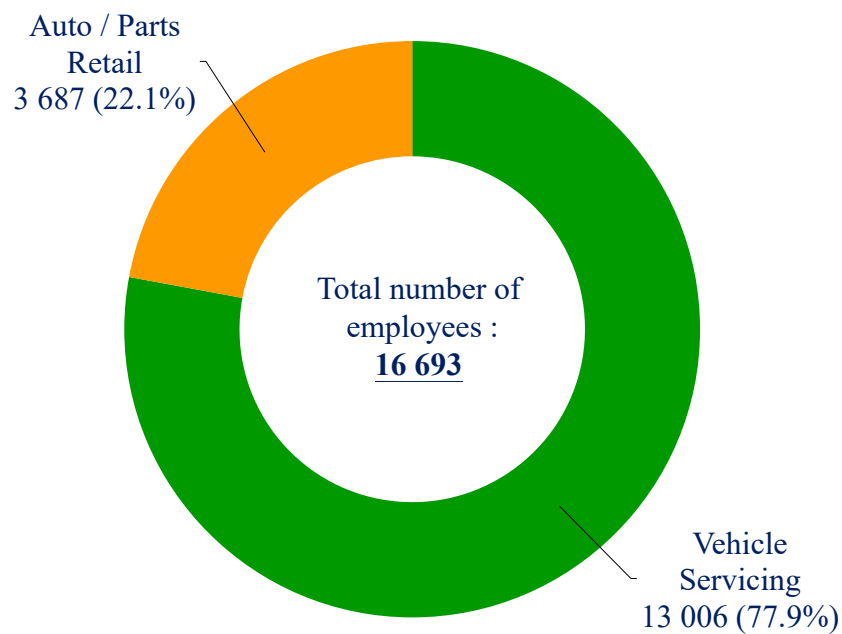
⁵ Sampled establishments which had ceased operation, not employed any automobile staff, etc. were classified as invalid samples.

4 Survey Findings

Overview of Automobile Industry

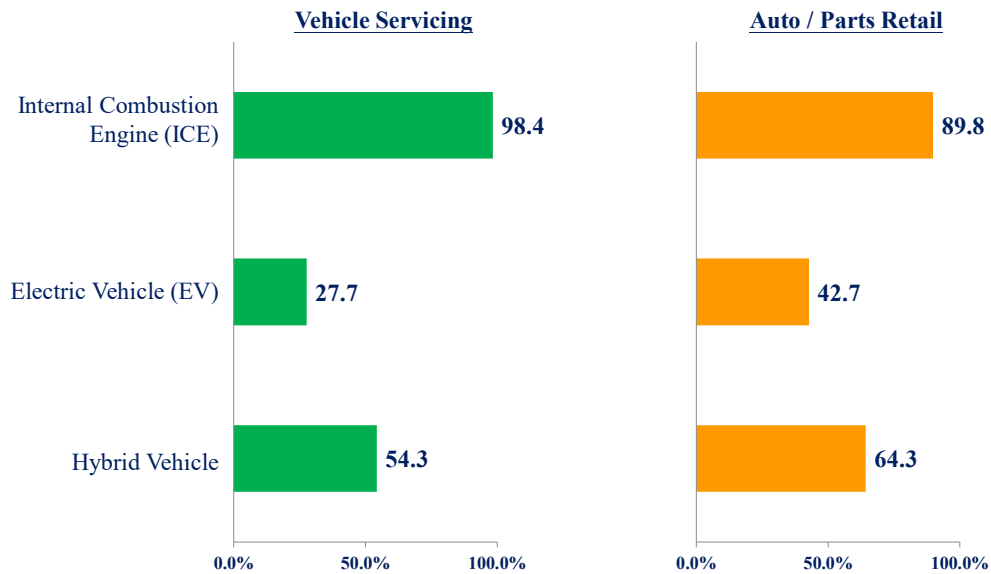
4.1 The survey revealed that as at 1 March 2023 (i.e. the reference date of the survey), a total of 16 693 employees were engaged in the automobile industry, with 77.9% (13 006 employees) being engaged in the vehicle servicing sector and 22.1% (3 687 employees) in the auto/parts retail sector. (Chart 4.1)

Chart 4.1 Automobile employees by sector



4.2 With respect to the business of vehicles types engaged, 98.4% of establishments in the vehicle servicing sector were engaged in internal combustion engine (ICE) vehicles, followed by hybrid vehicles (54.3%) and electric vehicles (EV) (27.7%). The corresponding proportions were 89.8%, 64.3% and 42.7% for establishments in the auto/parts retail sector. (Chart 4.2)

Chart 4.2 Types of vehicles engaged



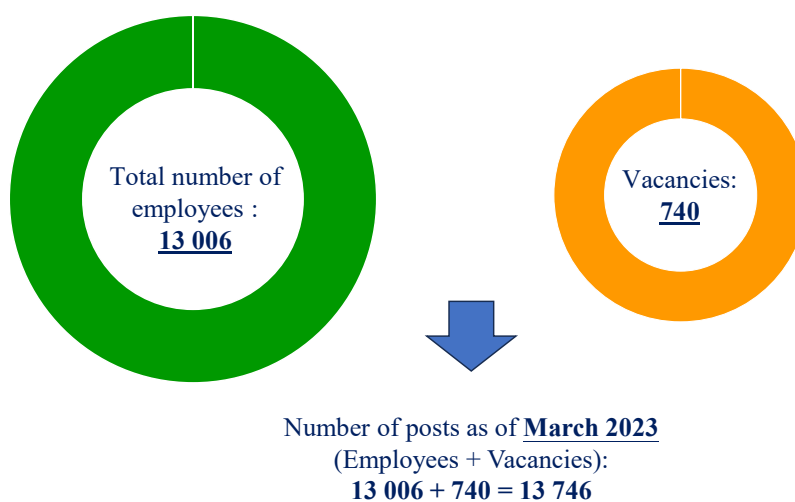
Notes: 1. The sum of % exceeds 100% as companies may engage in the business of more than one type of vehicle
 2. Percentages are calculated on the basis of total number of companies

Vehicle Servicing Sector

Overview of Manpower Situation

4.3 As at 1 March 2023, a total of 13 006 employees were engaged in the vehicle servicing sector, and 582 trainees were reported. Moreover, there were a total of 740 vacancies. Aggregating the total number of employees and vacancies, it was estimated that there were a total of 13 746 posts. (Chart 4.3)

Chart 4.3 Overview of manpower situation



Number of trainees: 582

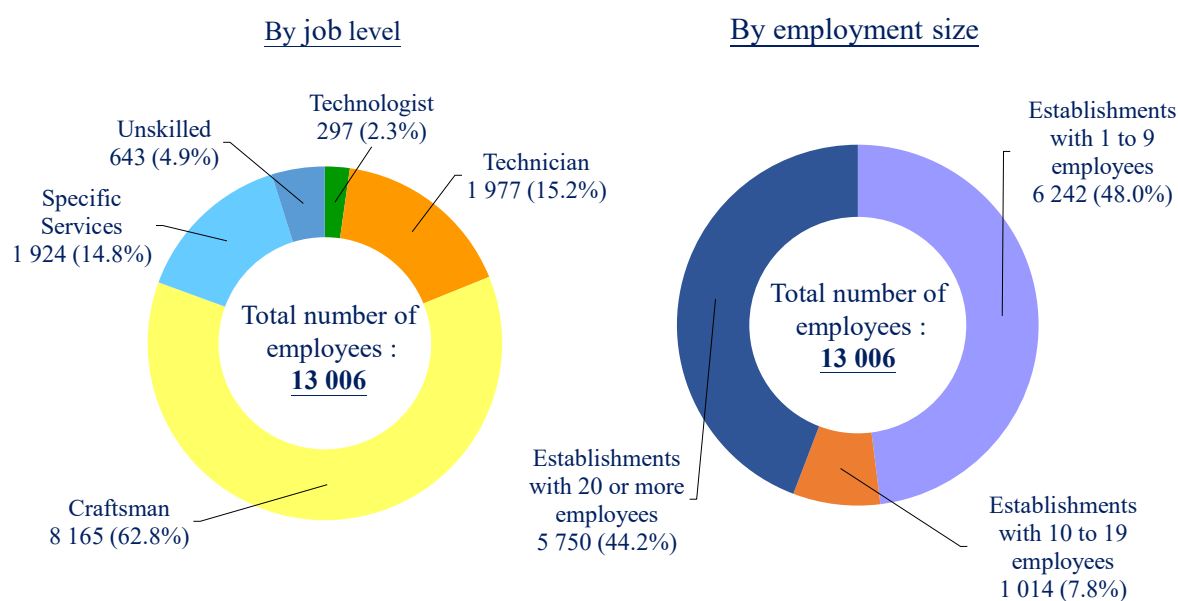
Note: “Vacancies” refer to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel as at survey reference date

Employees

4.4 Among the 13 006 employees engaged in the vehicle servicing sector, over 60% were working at the craftsman level (62.8%; 8 165 employees), about 15% at technician level (15.2%; 1 977 employees) or specific services level (14.8%; 1 924 employees), and less than 5% at unskilled level (4.9%; 643 employees) or technologist level (2.3%; 297 employees). (Chart 4.4)

4.5 Analysed by employment size, over 40% of employees worked in establishments with 1 to 9 employees (48.0%; 6 242 employees) and establishments with 20 or more employees (44.2%; 5 750 employees). 7.8% of employees worked in establishments with 10 to 19 employees. (Chart 4.4)

Chart 4.4 Employees by job level and employment size



Prominent Principal Jobs

4.6 In the vehicle servicing sector, the top 3 prominent principal jobs were “Vehicle Mechanic” (46.6%), “Service Supervisor” (6.9%) and “Vehicle Body Repairer” (6.6%).

Table 4.1 Top 3 prominent principal jobs by job level

Job level	Principal jobs	No. of employees	% of total number of employees
Technologist	Service Manager	194	1.5%
	Mechanical Engineer (Automotive)	101	0.8%
Technician	Service Supervisor	900	6.9%
	Motor Vehicle Examiner / Tester	349	2.7%
	Engineering Technician	329	2.5%
Craftsman	Vehicle Mechanic	6 064	46.6%
	Vehicle Body Repairer	854	6.6%
	Vehicle Electrician	641	4.9%
Specific Services	Car Detailing Worker	767	5.9%
	Tyre Worker / Battery Worker	296	2.3%
	Motocycle Mechanic	245	1.9%

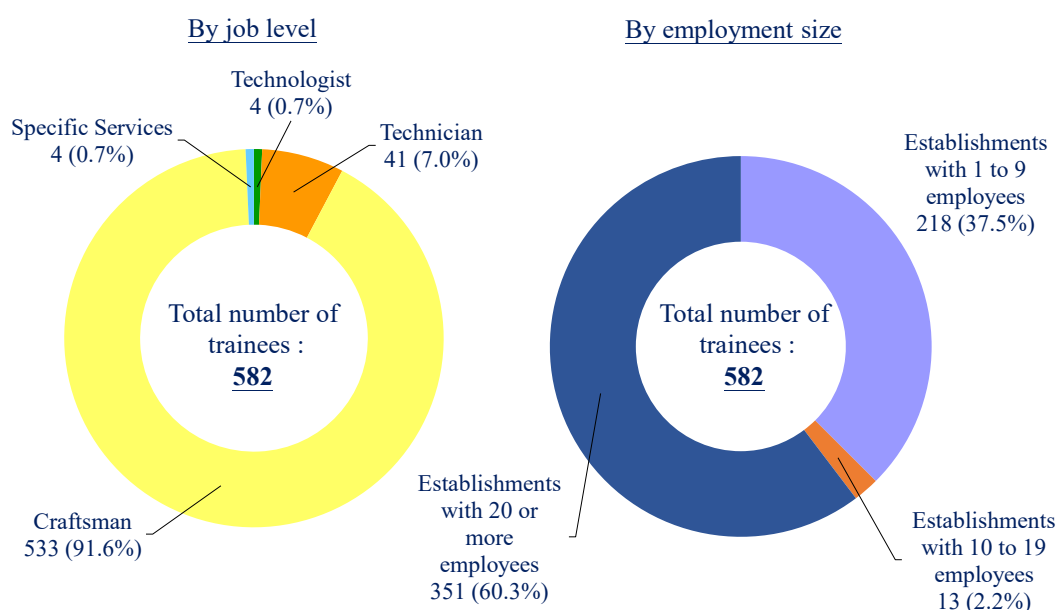
Note: Only the top 2 prominent principal jobs are highlighted for the technologist level because all other principal jobs accounted for less than 0.1%.

Trainees

4.7 As at 1 March 2023, there were 582 trainees in the vehicle servicing sector. Of these 582 trainees, over 90% worked at the craftsman level (91.6%; 533 trainees). (Chart 4.5)

4.8 Analysed by employment size, 60.3% were working in establishments with 20 or more employees whereas 37.5% in establishments with 1 to 9 employees. (Chart 4.5)

Chart 4.5 Trainees by job level and employment size

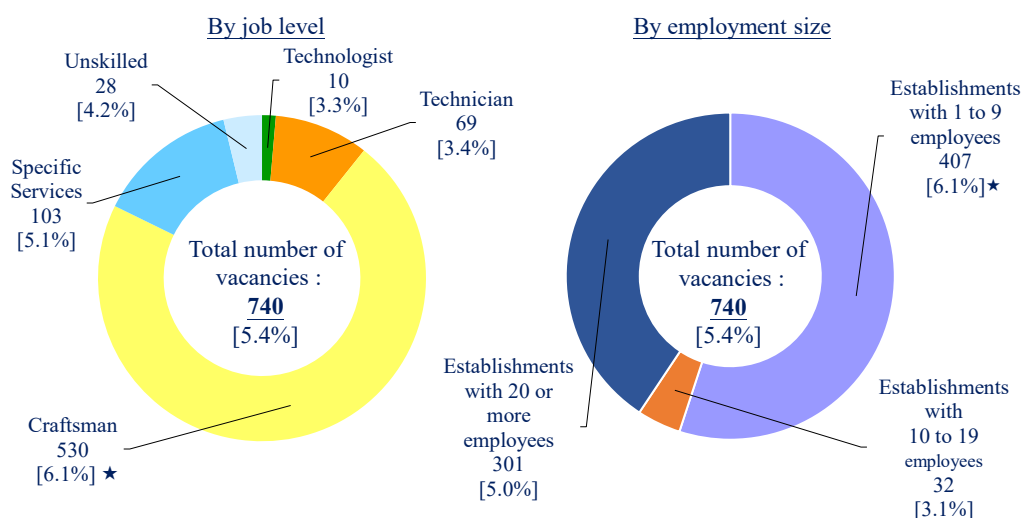


Vacancies

4.9 As at 1 March 2023, a total of 740 vacancies were reported in the vehicle servicing sector, representing a vacancy rate of 5.4% (i.e. vacancies as a percentage of the total number of employees and vacancies). The majority of vacancies were jobs at the craftsman level (530 vacancies), followed by the specific services level (103 vacancies). In terms of vacancy rate, a higher vacancy rate was found for the craftsman level (6.1%). (Chart 4.6)

4.10 Analysed by employment size, over half of vacancies were reported in establishments with 1 to 9 employees (407 vacancies), followed by establishments with 20 or more employees (301 vacancies). In terms of vacancy rate, a relatively higher vacancy rate was found for establishments with 1 to 9 employees (6.1%). (Chart 4.6)

Chart 4.6 Vacancies by job level and employment size



Notes: (1) Figures in [] brackets indicate the **Vacancy rate** = $\frac{\text{No. of vacancies}}{\text{No. of employees} + \text{No. of vacancies}}$
 (2) Figures marked with the symbol “★” refer to relatively higher vacancy rates than the overall rate.

Average Monthly Income

4.11 The average monthly income for employees in the vehicle servicing sector at the technologist level is mainly in the range of \$35,001 or above (80.5%). It was followed by \$20,001 - \$35,000 for the technician level (73.4%), \$15,001 - \$25,000 for the craftsman level (94.8%), \$15,001 - \$25,000 for the specific services level (83.6%) and \$15,000 or below for the unskilled level (65.2%). (Table 4.2)

Table 4.2 Average monthly income by job level

Job level	\$15,000 or below	\$15,001 - \$20,000	\$20,001 - \$25,000	\$25,001 - \$35,000	\$35,001 - \$45,000	Above \$45,000	No. of employees
Technologist	0.0%	0.0%	1.4%	18.2%	38.4%	42.1%	297
Technician	8.0%	8.6%	30.2%	43.2%	9.5%	0.5%	1 977
Craftsman	4.4%	35.5%	59.3%	0.8%	0.0%	0.0%	8 165
Specific Services	14.0%	50.5%	33.1%	2.3%	0.1%	0.0%	1 924
Unskilled	65.2%	31.3%	3.2%	0.3%	0.0%	0.0%	643

denotes prominent ranges of monthly income in the respective job level.

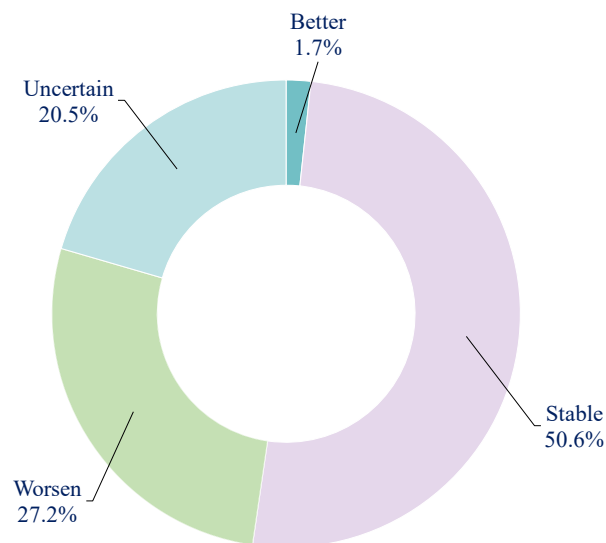
Employers' Views on Business Volume in the Next 12 Months

4.12 In the survey, employers were asked to indicate their views on the expected change in business volume of their establishments in the next 12 months. About half (50.6%) of the establishments in the vehicle servicing sector expected the business volume to remain stable while 27.2% to be worsen for the coming year. (Chart 4.7)

4.13 The major reasons for expecting worsen business volume cited included:

- Not optimistic in recovery of business after COVID-19 and/or mass emigration wave;
- Servicing and repairing business are expected to reduce due to an increasing supply in EV; and
- A lower repairing cost in the Mainland China.

Chart 4.7 Views on business volume for the coming year



Note : Percentage are calculated on the basis of total number of companies

Employees Left and Recruited in the Past 12 Months

4.14 In the vehicle servicing sector, employers reported that 626 employees had left their establishments in the past 12 months. The turnover rate (i.e. the number of employees left as a percentage of the total number of posts) was 4.8%. Analysed by job level, the craftsman level registered the largest number of employees left (384 employees) whereas the turnover rate was the highest at the technologist level (6.8%). (Table 4.3)

Table 4.3 Employees left by job level

Job level	Number of employees left	Turnover rate*
Technologist	21	6.8%
Technician	103	5.0%
Craftsman	384	4.4%
Specific Services	118	5.8%
Overall	626	4.8%

Note: * Turnover rate = no. of employees left in past 12 months / (no. of employees + no. of vacancies)

4.15 During the 12 months before enumeration, a total of 606 employees were recruited in the vehicle servicing sector. The number of new recruits was similar to the number of employees left. About two-thirds (62.7%) of the new recruits had relevant experience. Such percentage was relatively higher among the new recruits at the technologist level (86.2%) and the technician level (90.2%). (Table 4.4)

Table 4.4 Staff recruited by job level

Job level	Number of new recruits with relevant experience	Total number of new recruits
Technologist	25 (86.2%)	29
Technician	74 (90.2%)	82
Craftsman	233 (58.8%)	396
Specific Services	48 (48.5%)	99
Overall	380 (62.7%)	606


Note: () As a percentage of total no. of new recruits

Preferred Level of Education

4.16 As expected, the higher the job level, the higher is the preferred level of education of employees. Three quarters (75.7%) of the employees at the technologist level were preferred to have a first degree qualification. As for employees at the technician level, 43.8% were preferred to have a sub-degree and 42.9% were preferred to have a diploma/certificate qualification. Among the employees at the craftsman level, three quarters (74.6%) were preferred to have secondary or below qualification while a quarter (25.4%) were preferred to have a diploma/certificate qualification. Over 80% of the employees at the specific services level (80.2%) were preferred to have a secondary or below qualification. (Table 4.5)

Table 4.5 Preferred level of education

Job level	Secondary 3 or below	Secondary 4 to 7	Diploma/certificate	Sub-degree	First degree	Post-graduate degree	No. of employees
Technologist	0.0%	1.7%	2.4%	19.6%	75.7%	0.7%	297
Technician	0.0%	8.5%	42.9%	43.8%	4.8%	0.0%	1977
Craftsman	19.9%	54.7%	25.4%	0.0%	0.0%	0.0%	8165
Specific Services	23.7%	56.5%	19.8%	0.0%	0.0%	0.0%	1924


 denotes prominent preferred levels of education in the respective job level.

Preferred Years of Experience

4.17 Similar to the preferred level of education, the preferred years of experience correlated with job levels. Employers tended to prefer employees at the technologist level to have 6 years or more of experience (94.0%). As for employees at the technician level, 60.6% were preferred to have 3 years to less than 6 years and 36.4% of them were preferred to have 6 years or more of experience. Around 30% to 40% of the employees at the craftsman level and specific services level were preferred to have 1 year to less than 3 years (48.0% and 34.8% respectively) or 3 years to less than 6 years of experience (40.3% and 32.8% respectively). (Table 4.6)

Table 4.6 Preferred years of experience

Job level	Less than 1 year	1 year to less than 3 years	3 years to less than 6 years	6 years to less than 10 years	10 years or above	No. of employees
Technologist	6.0%	0.0%	0.0%	68.5%	25.6%	297
Technician	2.7%	0.4%	60.6%	34.2%	2.2%	1 977
Craftsman	5.3%	48.0%	40.3%	6.2%	0.2%	8 165
Specific Services	25.8%	34.8%	32.8%	6.4%	0.2%	1 924

 denotes prominent preferred years of experience in the respective job level

Recruitment Difficulties

4.18 A small number of establishments in the vehicle servicing sector engaged in recruitment exercises in the past 12 months. Among those establishments engaged in the recruitment exercises, the percentages of establishments encountering recruitment difficulties were relatively higher for those recruiting employees at the technician (87.5%), craftsman (75.4%) and specific services (89.3%) levels, as compared with that of the technologist level (62.5%). (Table 4.7)

4.19 The difficulties encountered varied among different job levels. When recruiting employees at the technologist level, the difficulties encountered were mainly “candidates had more choices in the market” (60.0%) and “candidates lacked the relevant academic qualification and credential” (60.0%). As for the technician level, the difficulties encountered were mainly “candidates found the remuneration package and fringe benefit not attractive” (64.3%), “candidates had more choices in the market” (42.9%) and “candidates lacked the relevant academic qualification and credential” (35.7%). The difficulties encountered for recruiting employees at the craftsman level were mainly “candidates lacked the relevant academic qualification and credential” (54.4%) and “candidates were unsatisfied with the working environment in the industry” (36.1%), whereas that for the specific services level were “candidates found the remuneration package and fringe benefit not attractive” (68.0%) and “candidates were unsatisfied with the working environment in the industry” (62.0%). (Table 4.7)

Table 4.7 Difficulties encountered in recruitment in the past 12 months

	Technologist	Technician	Craftsman	Specific Services
With recruitment difficulties	62.5%	87.5%	75.4%	89.3%
• Candidates had more choices in the market	60.0%	42.9%	21.3%	20.0%
• Candidates lacked the relevant academic qualification and credential	60.0%	35.7%	54.4%	6.0%
• Candidates found the remuneration package and fringe benefit not attractive	0.0%	64.3%	11.8%	68.0%
• Candidates were unsatisfied with the working environment in the industry	0.0%	21.4%	36.1%	62.0%
• Candidates lacked awareness of career opportunities & prospect in the industry	0.0%	21.4%	28.4%	24.0%
• Insufficient programmes available in the market to provide trained manpower in the industry	20.0%	21.4%	5.3%	10.0%
• Competition for manpower from the Mainland/Macao/other cities	0.0%	0.0%	1.2%	0.0%
Without recruitment difficulties	37.5%	12.5%	24.6%	10.7%
No. of establishments with recruitment exercise (% of establishments with recruitment exercise for the respective level of employees)	8 (0.2%)	16 (0.5%)	224 (6.9%)	56 (1.7%)

Note: Respondents might mention more than one recruitment difficulty.

Training Requirement

4.20 In the survey, employers were asked to indicate the training areas and urgency for their employees. “Vehicle mechanic (ICE)”, “vehicle electronics (ICE)”, “diagnosis using computers” and “safety for vehicle servicing” were the major areas cited for employees at the technologist level, technician level and craftsman level. On the other hand, employees at the specific services level tended to focus on “vehicle painting”, “vehicle body repairing” and “safety for vehicle servicing”. (Table 4.8)

Table 4.8 Top 3 training areas urgently required/required by job level

Rank	Technologist	Technician	Craftsman	Specific Services
1st	Vehicle Mechanic (ICE)			Vehicle Painting
<i>Urgently required</i>	14.0%	23.2%	16.9%	3.9%
<i>Required</i>	59.1%	51.2%	68.8%	59.6%
2nd	Vehicle Electronics (ICE)		Safety for vehicle servicing	Vehicle Body Repairing
<i>Urgently required</i>	11.8%	21.2%	30.9%	11.0%
<i>Required</i>	58.5%	52.7%	54.2%	46.9%
3rd	Diagnosis using computers		Vehicle Electronics (ICE)	Safety for vehicle servicing
<i>Urgently required</i>	16.2%	27.1%	15.8%	13.0%
<i>Required</i>	48.4%	44.0%	68.2%	42.2%

Note: Respondents were invited to indicate the training areas and urgency for employees at the respective levels of the Vehicle Servicing Sector. The top 3 training areas with the highest percentage of respondents regarded as “urgently required/required” are highlighted for each job level.

Qualified EV and Hybrid Vehicle Maintenance Workers at Present and in the Next Three Years

4.21 The number of qualified EV and hybrid vehicle maintenance workers at present and the expected number in the next three years were collected in the survey. As at 1 March 2023, employers reported that there were 772 qualified EV maintenance workers. It is expected that the number of qualified EV maintenance workers will significantly increase in the next three years from 772 to 1 714, representing a change of +122% over 2023. The increase will be mainly at the craftsman level (+668 employees). (Chart 4.8)

4.22 As for hybrid vehicle maintenance workers, 1 793 workers were reported as at 1 March 2023. The number of qualified hybrid vehicle maintenance workers will also significantly increase in the next three years from 1 793 to 2 271, representing a change of +26.7% over 2023. The increase will be mainly at the craftsman level (+376 employees) as well. (Chart 4.8)

Chart 4.8 Qualified EV and hybrid vehicle maintenance workers

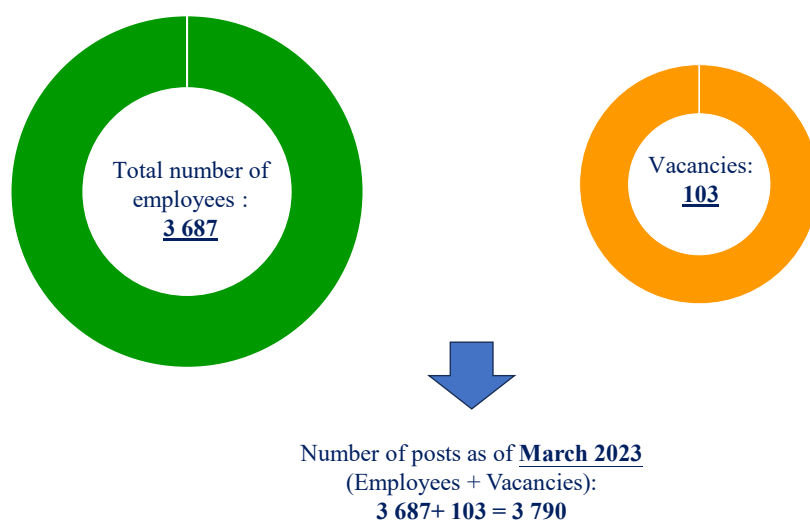


Auto/Parts Retail Sector

Overview of Manpower Situation

4.23 As at 1 March 2023, a total of 3 687 employees were engaged in the auto/parts retail sector. Moreover, there were a total of 103 vacancies. Aggregating the total number of employees and vacancies, it was estimated that there were 3 790 posts. (Chart 4.9)

Chart 4.9 Overview of manpower situation



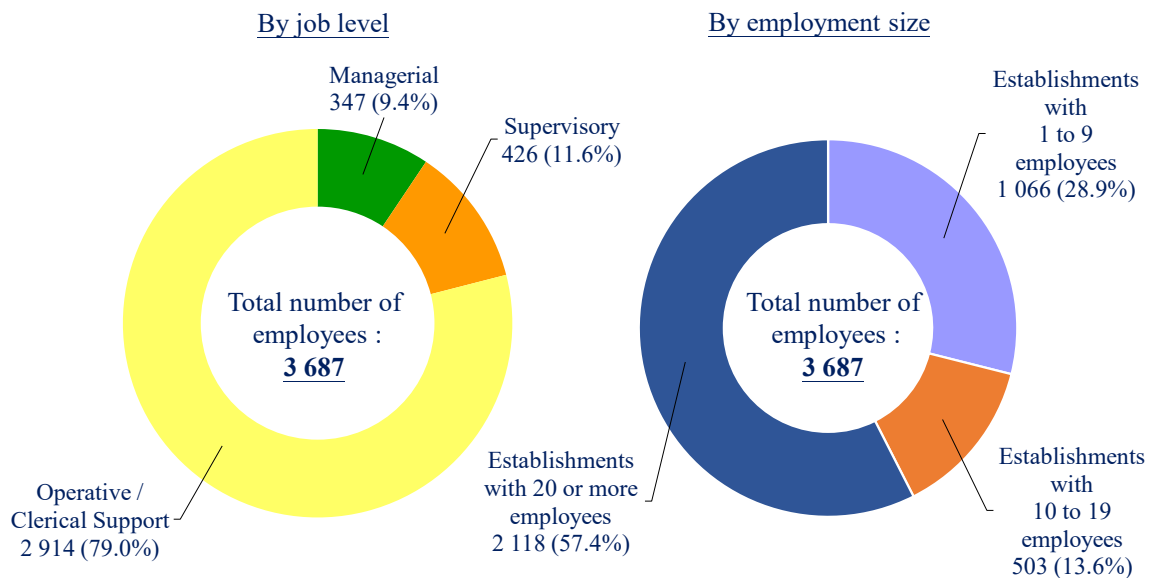
Note: “Vacancies” refer to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel as at the survey reference date.

Employees

4.24 Among 3 687 employees engaged in the auto/parts retail sector, the majority of employees worked at the operative/clerical support level (79.0%; 2 914 employees). About one-tenth of employees worked at the supervisory level (11.6%; 426 employees) and the managerial level (9.4%; 347 employees). (Chart 4.10)

4.25 Analysed by employment size, over half of employees worked in establishments with 20 or more employees (57.4%; 2 118 employees). Relatively fewer of employees worked in establishments with 1 to 9 employees (28.9%; 1 066 employees) and establishments with 10 to 19 employees (13.6%; 503 employees). (Chart 4.10)

Chart 4.10 Employees by job level and employment size



Prominent Principal Jobs

4.26 In the auto/parts retail sector, the most prominent principal job was “Senior Sales Representative/Staff” (37.3%), followed by “Other Clerks/Supporting Staff” (25.3%) and “Junior Sales Representative / Staff” (11.9%).

Table 4.9 Top 3 prominent principal jobs by job level

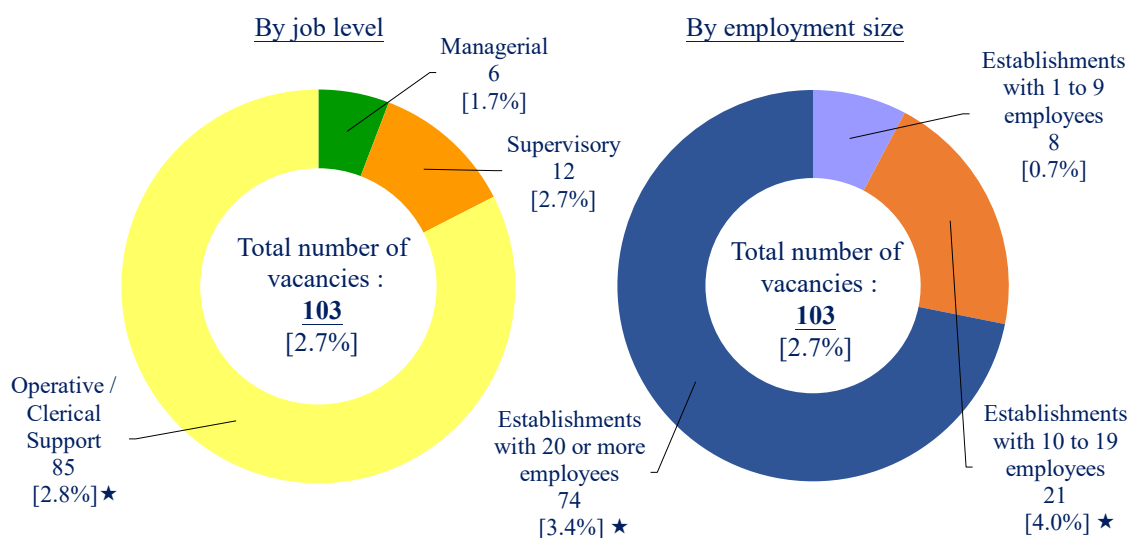
Job level	Principal jobs	No. of employees	% of total number of employees
Managerial	Sales Manager	113	3.1%
	General Manager	65	1.8%
	Owner / Sole Proprietor / Working Partner	54	1.5%
Supervisory	Store / Branch Supervisor	137	3.7%
	Parts / Logistics / Distribution / Warehouse Supervisor	119	3.2%
	Customer Services Supervisor	74	2.0%
Operative/ Clerical Support	Senior Sales Representative / Staff	1 374	37.3%
	Other Clerks / Supporting Staff	933	25.3%
	Junior Sales Representative / Staff	439	11.9%

Vacancies

4.27 As at 1 March 2023, a total of 103 vacancies were reported in the auto/parts retail sector, representing a vacancy rate of 2.7% (i.e. vacancies as a percentage of the total number of employees and vacancies). The majority of vacancies were jobs at the operative/clerical support level (85 vacancies). In terms of vacancy rate, a higher vacancy rate was also found for the operative/clerical support level (2.8%). (*Chart 4.11*)

4.28 Analysed by employment size, the majority of vacancies were reported in establishments with 20 or more employees (74 vacancies). In terms of vacancy rate, a relatively higher vacancy rate was found for establishments with 10 to 19 employees (4.0%) and establishments with 20 or more employees (3.4%). (*Chart 4.11*)

Chart 4.11 Vacancies by job level and employment size



Notes: (1) Figures in [] brackets indicate the **Vacancy rate** = $\frac{\text{No. of vacancies}}{\text{No. of employees} + \text{No. of vacancies}}$
 (2) Figures marked with the symbol “★” refer to relatively higher vacancy rates than the overall rate.

Average Monthly Income

4.29 The average monthly income for employees in the auto/parts retail sector at the managerial level is mainly in the range of \$35,001 or above (75.3%). It was followed by \$20,001 - \$35,000 for the supervisory level (85.5%) and \$15,001 - \$25,000 for the operative/clerical support level (70.8%). (Table 4.10)

Table 4.10 Average monthly income by job level

Job level	\$15,000 or below	\$15,001 - \$20,000	\$20,001 - \$25,000	\$25,001 - \$35,000	\$35,001 - \$45,000	Above \$45,000	No. of employees
Managerial	0.0%	0.0%	2.8%	21.9%	44.4%	30.9%	347
Supervisory	0.5%	4.5%	53.7%	31.8%	9.5%	0.0%	426
Operative / Clerical Support	16.7%	34.7%	36.1%	9.6%	0.3%	2.6%	2 914

denotes prominent ranges of monthly income in the respective job level.

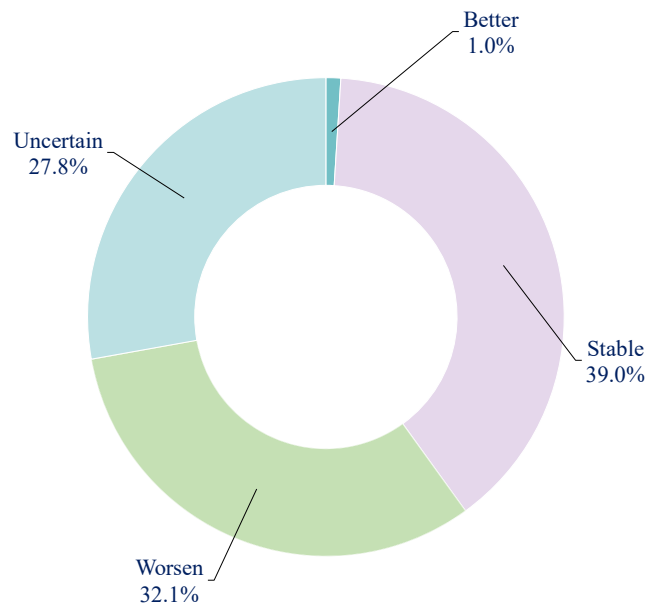
Employers' Views on Business Volume in the Next 12 Months

4.30 In the survey, employers were asked to indicate their views on the expected change in business volume of their establishments in the next 12 months. 39% of the establishments in the auto/parts retail sector expected the business volume to remain stable while 32.1% to be worsened for the coming year. (Chart 4.12)

4.31 The major reasons for expecting worsen business volume included:

- Not optimistic in recovery of business after COVID-19 and/or mass emigration wave;
- Business cost increased;
- Customers have other choices (e.g. online shopping); and
- Customers opt for buying a new EV instead of buying parts for repair.

Chart 4.12 Views on business volume for the coming year



Note: Percentages are calculated on the basis of total number of companies

Employees Left and Recruited in the Past 12 Months

4.32 In the auto/parts retail sector, employers reported that 336 employees had left their establishments in the past 12 months. The turnover rate (i.e. the number of employees left as a percentage of the total number of posts) was 8.9%. Analysed by job level, the operative/clerical support level registered the largest number of employees left (246 employees) whereas the turnover rate was relatively higher at the supervisory level (14.8%). (Table 4.11)

Table 4.11 Employees left by job level

Job level	Number of employees left	Turnover rate*
Managerial	25	7.1%
Supervisory	65	14.8%
Operative/ Clerical Support	246	8.2%
Overall	336	8.9%

Note: * Turnover rate = no. of employees left in past 12 months / (no. of employees + no. of vacancies)

4.33 During the 12 months before enumeration, a total of 310 employees were recruited in the auto/parts retail sector. The number of new recruits was similar to the number of employees left. About half (51.6%) of the new recruits had relevant experience. Such percentage was similar among the new recruits at different job levels (49.0% - 56.3%). (Table 4.12)

Table 4.12 Staff recruited by job level

Job level	Number of new recruits with relevant experience	Total number of new recruits
Managerial	18 (56.3%)	32
Supervisory	25 (49.0%)	51
Operative/ Clerical Support	117 (51.5%)	227
Overall	160 (51.6%)	310


Note: () As a percentage of total no. of new recruits

Preferred Level of Education

4.34 As expected, the higher the job level, the higher is the preferred level of education level of employees. 82.2% of the employees at the managerial level were preferred to have a first degree qualification. As for employees at the supervisory level, 57.7% were preferred to have a sub-degree qualification while 25.1% were preferred to have a first degree qualification. Among the employees at the operative/clerical support level, 34.6% were preferred to have a diploma/certificate qualification and 51.1% were preferred to have a secondary 4 to 7 qualification. (Table 4.13)

Table 4.13 Preferred level of education

Job level	Secondary 3 or below	Secondary 4 to 7	Diploma/certificate	Sub-degree	First degree	Post-graduate degree	No. of employees
Managerial	0.0%	0.3%	1.5%	16.0%	82.2%	0.0%	347
Supervisory	0.0%	4.0%	13.1%	57.7%	25.1%	0.0%	426
Operative / Clerical Support	0.7%	51.1%	34.6%	11.8%	1.8%	0.0%	2 914


 denotes prominent preferred level of education in the respective job level.

Preferred Years of Experience

4.35 Similar to the preferred level of education, the preferred years of experience correlated with job levels. Employers tended to prefer employees at the managerial level to have 6 years or more of experience (98.3%). Three quarters (75.1%) of the employees at the supervisory level were preferred to have 3 years to less than 6 years of experience. As for employees at the operative/clerical support level, 52.3% were preferred to have 1 year to less than 3 years of experience and 33.4% were preferred to have 3 years to less than 6 years of experience. (Table 4.14)

Table 4.14 Preferred years of experience

Job level	Less than 1 year	1 year to less than 3 years	3 years to less than 6 years	6 years to less than 10 years	10 years or above	No. of employees
Managerial	0.0%	1.7%	0.0%	57.1%	41.1%	347
Supervisory	0.0%	1.9%	75.1%	22.1%	0.9%	426
Operative / Clerical Support	8.6%	52.3%	33.4%	5.3%	0.3%	2 914

 denotes prominent preferred years of experience in the respective job level

Recruitment Difficulties

4.36 A small number of establishments in the auto/parts retail sector engaged in the recruitment exercises in the past 12 months. Among those establishments engaged in the recruitment exercises, the percentages of establishments encountering recruitment difficulties were relatively higher for those recruiting employees at the supervisory level (62.5%), as compared with the managerial level (37.5%) and the operative/clerical support level (31.3%). (Table 4.15)

4.37 The difficulties encountered varied among different job levels. When recruiting employees at the managerial level, “candidates had more choices in the market” (66.7%) was the main difficulty encountered. As for the supervisory level, the difficulties encountered were mainly “candidates found the remuneration package and fringe benefit not attractive” (100%), “candidates lacked the relevant academic qualification and credential” (60.0%) and “candidates lacked awareness of career opportunities and prospect in the industry” (60.0%). The difficulties encountered for recruiting employees at the operative/clerical support level were mainly “candidates had more choices in the market” (80.0%) and “candidates found the remuneration package and fringe benefit not attractive” (43.3%). (Table 4.15)

Table 4.15 Difficulties encountered in recruitment in the past 12 months

	Managerial	Supervisory	Operative / Clerical Support
With recruitment difficulties	37.5%	62.5%	31.3%
• Candidates had more choices in the market	66.7%	40.0%	80.0%
• Candidates lacked the relevant academic qualification and credential	33.3%	60.0%	3.3%
• Candidates found the remuneration package and fringe benefit not attractive	33.3%	100.0%	43.3%
• Candidates were unsatisfied with the working environment in the industry	0.0%	40.0%	3.3%
• Candidates lacked awareness of career opportunities & prospect in the industry	0.0%	60.0%	10.0%
• Insufficient programmes available in the market to provide trained manpower in the industry	0.0%	40.0%	6.7%
• Competition for manpower from the Mainland/Macao/other cities	0.0%	0.0%	0.0%
Without recruitment difficulties	62.5%	37.5%	68.8%
No. of establishments with recruitment exercise (% of establishments with recruitment exercise for the respective level of full-time employees)	8 (0.9%)	8 (0.9%)	96 (11.1%)

Note: Respondents might mention more than one recruitment difficulty.

Training Requirement

4.38 In the survey, employers were asked to indicate the training areas and urgency for their employees. “Selling skills” and “customer service” were the two major areas cited for employees at all levels. “English and Putonghua” was another major area of training required for employees at the managerial level and supervisory level whereas training on “automotive fundamentals” was required for the employees at the operative/clerical support level. (Table 4.16)

Table 4.16 Top 3 training areas urgently required/required by job level

Rank	Managerial	Supervisory	Operative / Clerical Support
1st	Selling skills		
<i>Urgently required</i>	20.7%	12.9%	40.8%
<i>Required</i>	67.7%	76.4%	50.1%
2nd	Customer service		
<i>Urgently required</i>	20.5%	20.3%	41.0%
<i>Required</i>	56.4%	57.8%	35.8%
3rd	English, Putonghua		Automotive fundamentals
<i>Urgently required</i>	9.2%	2.3%	13.7%
<i>Required</i>	57.8%	66.8%	50.5%

Note:

- (1) Respondents were invited to indicate the training areas and urgency for employees at the respective levels of the Auto/Parts Retails Sector. The top 3 training areas with the highest percentage of respondents regarded as “urgently required/required” are highlighted for each job level.
- (2) “Operative/Clerical Support” includes the following principal jobs: senior sales representative/staff; junior sales representative/staff; stock assistant; sales/service staff; other clerks/supporting staff

5 Manpower Analysis

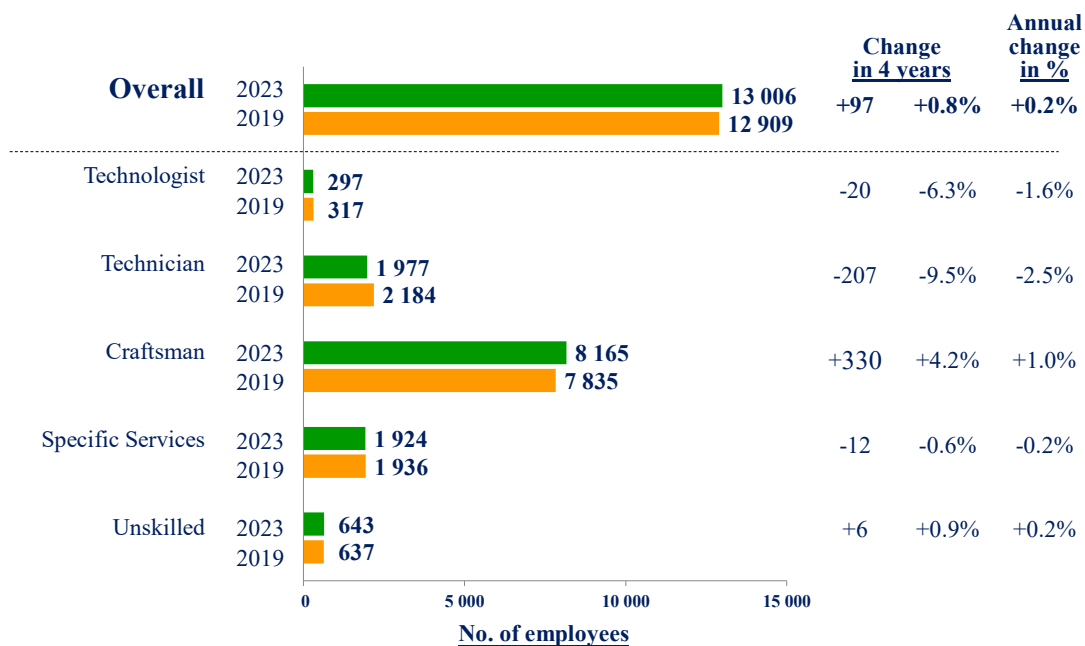
Manpower Changes between 2019 and 2023

Vehicle Servicing Sector

Changes in employees

5.1 The total number of employees in the vehicle servicing sector has slightly increased from 12 909 in 2019 to 13 006 in 2023, with an increase of 0.8% (+97 persons). When analysed by job level, there was an increase in the craftsman level (+330 persons; +4.2%) while a drop was observed for employees at the technician level (-207 persons; -9.5%).

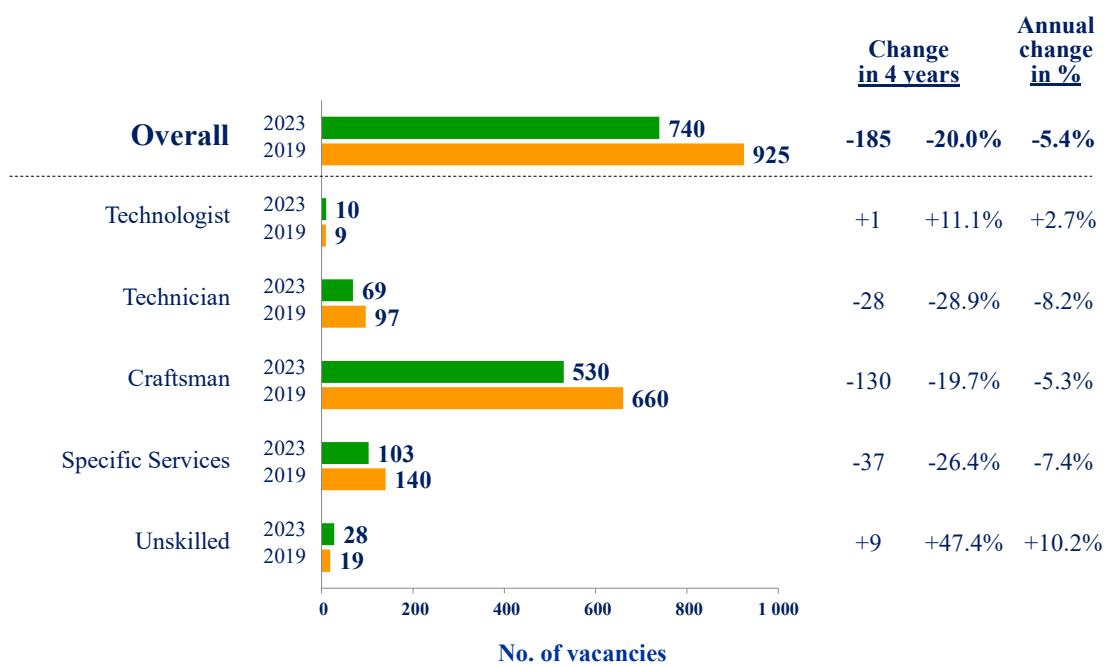
Chart 5.1 Changes in employees between 2019 and 2023



Changes in vacancies

5.2 The total number of vacancies in the vehicle servicing sector has decreased from 925 in 2019 to 740 in 2023, representing a decrease of 20.0% (-185 vacancies). The drop was mainly attributable to the decrease in vacancies at the craftsman level (-130 vacancies; -19.7%).

Chart 5.2 Changes in vacancies between 2019 and 2023

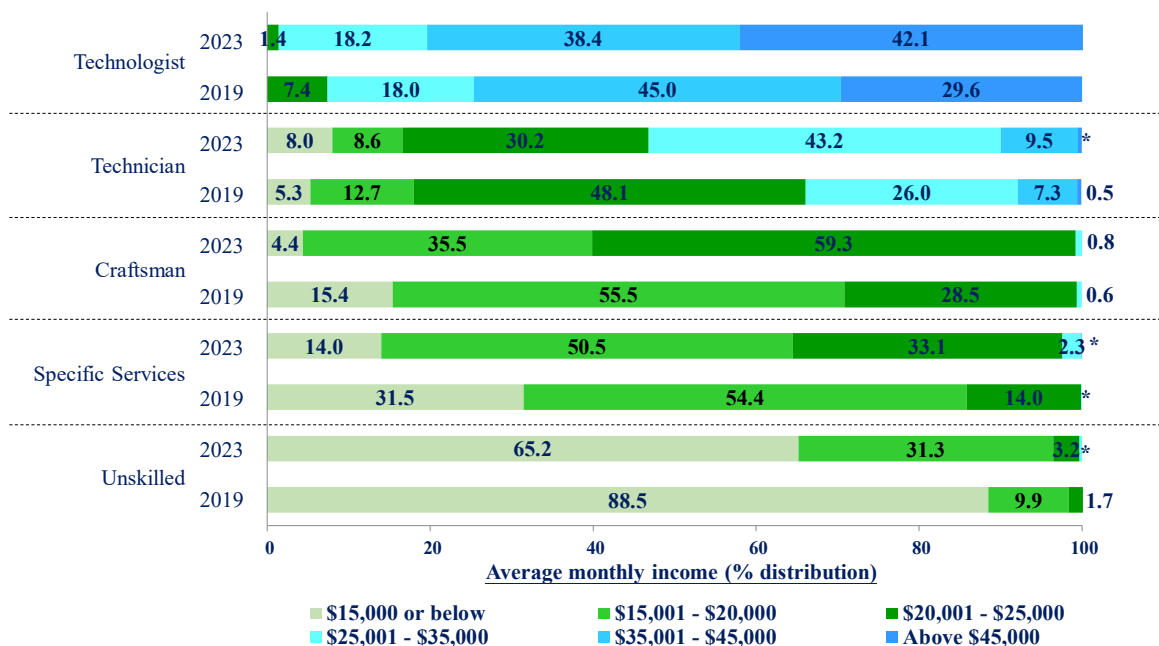


Changes in average monthly income

5.3 Compared with the results of the 2019 Survey, a general upward trend in the average monthly income was recorded across various job levels in the vehicle servicing sector:

- Technologist level: percentage of those ranged above \$45,000 increased from 29.6% to 42.1% while those ranged \$35,001 - \$45,000 decreased from 45.0% to 38.4%;
- Technician level: percentage of those ranged \$25,001 - \$35,000 and \$35,001 - \$45,000 increased from 26.0% to 43.2% and 7.3% to 9.5% respectively while those ranged \$20,001 - \$25,000 decreased from 48.1% to 30.2%;
- Craftsman level: percentage of those ranged \$20,001 - \$25,000 increased from 28.5% to 59.3% while those ranged \$15,000 or below and \$15,001 - \$20,000 decreased from 15.4% to 4.4% and 55.5% to 35.5% respectively;
- Specific services level: percentage of those ranged \$20,001 - \$25,000 increased from 14.0% to 33.1% while those ranged \$15,000 or below and \$15,001 - \$20,000 decreased from 31.5% to 14.0% and 54.4% to 50.5% respectively; and
- Unskilled level: percentage of those ranged \$15,001 - \$20,000 increased from 9.9% to 31.3% while those ranged \$15,000 or below decreased from 88.5% to 65.2%.

Chart 5.3 Changes in average monthly income between 2019 and 2023

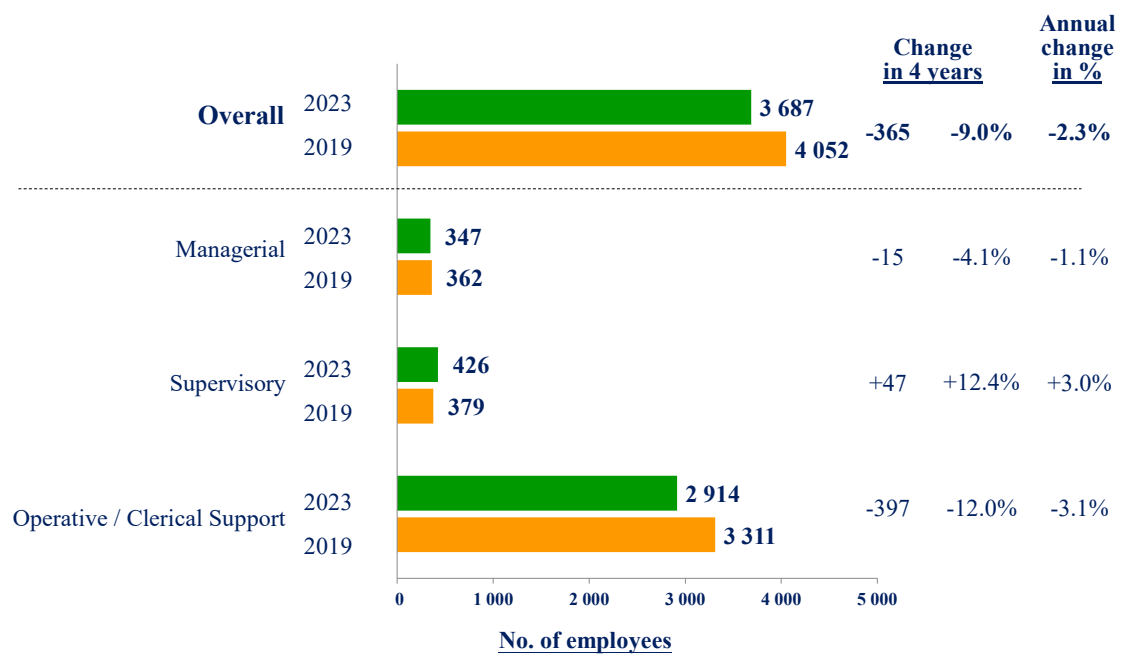


Auto/Parts Retail Sector

Changes in employees

5.4 The total number of employees in the auto/parts retail sector has decreased from 4 052 in 2019 to 3 687 in 2023, representing a decrease of 9.0% (-365 employees). The drop was mainly attributable to the decrease in employees at the operative/clerical support level (-397 employees; -12.0%).

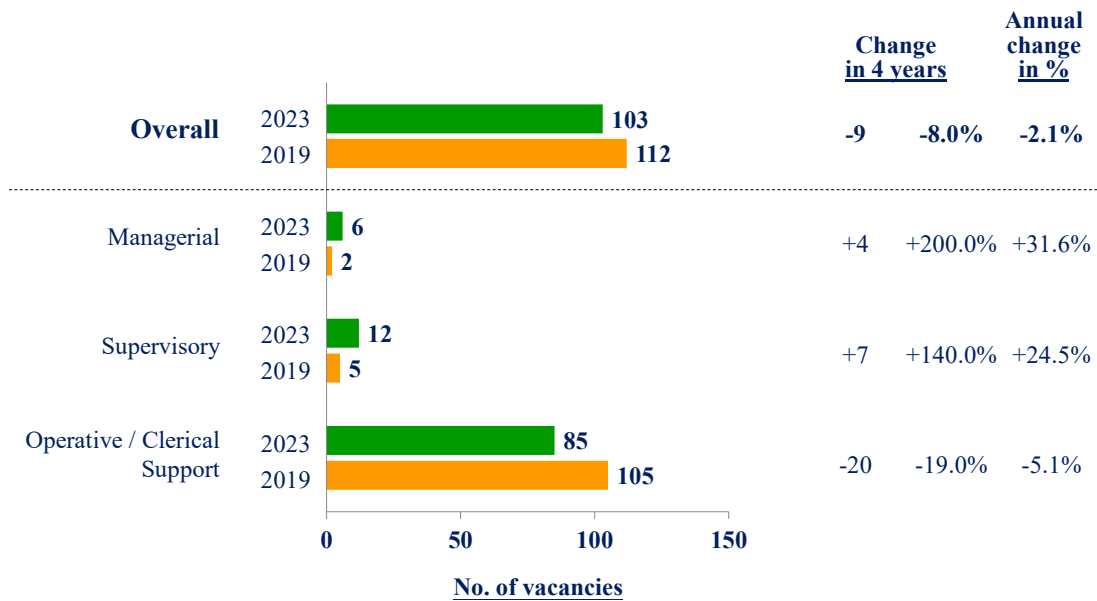
Chart 5.4 Changes in employees between 2019 and 2023



Changes in vacancies

5.5 The total number of vacancies in the auto/parts retail sector has decreased from 112 in 2019 to 103 in 2023, representing a decrease of 8.0% (-9 vacancies). The drop was mainly attributable to the decrease in vacancies at the operative/clerical support level (-20 vacancies; -19.0%).

Chart 5.5 Changes in vacancies between 2019 and 2023

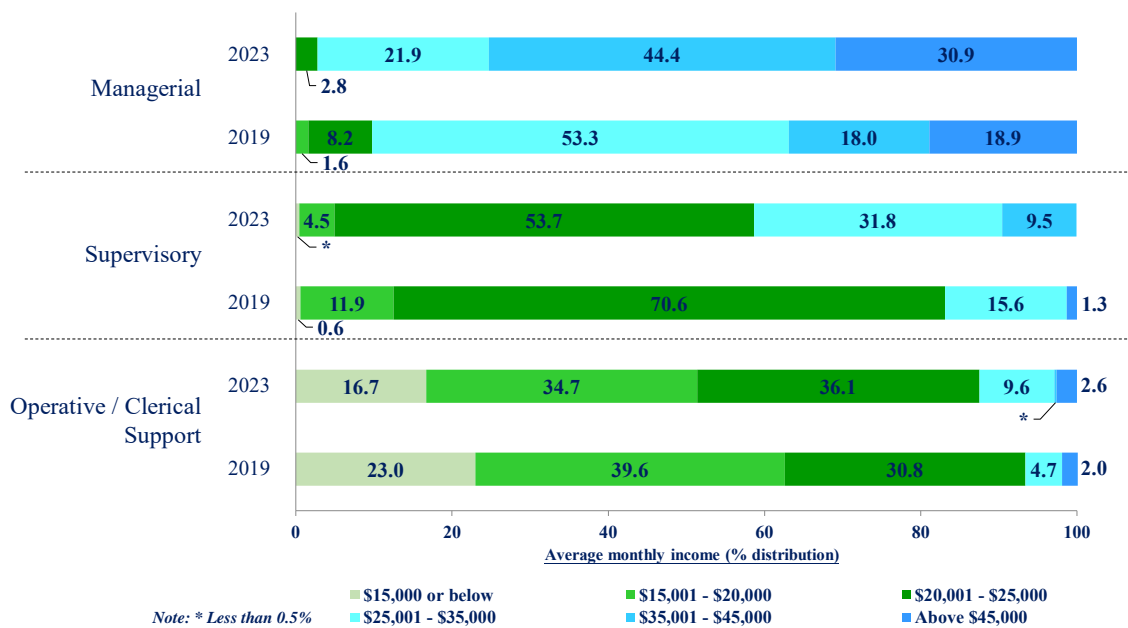


Changes in average monthly income

5.6 Compared with the results of the 2019 survey, a general upward trend in the average monthly income was recorded across various job levels in the auto/parts retail sector:

- Managerial level: percentage of those ranged \$35,001 - \$45,000 and above \$45,000 increased from 18.0% to 44.4% and 18.9% to 30.9% respectively while those ranged \$25,001 - \$35,000 decreased from 53.3% to 21.9%;
- Supervisory level: percentage of those ranged \$25,001 - \$35,000 and \$35,000 - \$45,000 increased from 15.6% to 31.8% and 1.3% to 9.5% respectively while those ranged \$15,001 - \$20,000 decreased from 70.6% to 53.7%; and
- Operative / clerical support level: percentage of those ranged \$20,001 - \$25,000 increased from 30.8% to 36.1% while those ranged \$15,001 - \$20,000 and \$15,000 or below decreased from 39.6% to 34.7% and 23.0% to 16.7% respectively.

Chart 5.6 Changes in average monthly income between 2019 and 2023



5.7 Business Outlook

5.7.1 The automobile industry in Hong Kong is characterised by unique challenges and a distinctive market landscape. As a highly urbanised and densely populated city, Hong Kong's well-developed public transportation system, including an extensive network of buses and an efficient Mass Transit Railway (MTR), provides an alternative to private car usage.

5.7.2 On the other hand, the HKSAR Government has been promoting the use of EVs as part of its efforts to reduce carbon emissions. Various incentives, such as tax exemptions, are provided to encourage EV adoption. This has led to a growing market for EVs in Hong Kong, though the pace of installing charging stations is progressing gently across the city. Hong Kong is currently moving along the path to normalcy, the Training Board is cautiously optimistic about the prospect of the automobile industry. The following challenges and opportunities are worthy of note.

Challenges

Manpower Shortage

5.7.3 The labour force in Hong Kong has declined in recent years. According to the latest data published by the C&SD, the working population declined by 94 100 or 2.4% in 2022, representing the largest drop since 1985 when the system of keeping records was introduced. As per the statistics⁶ provided by the Transport Department, the total number of licensed vehicles in 2019 was 802 698 and the figure was increased to 820 882 as of March 2023. Regarding the manpower of the industry as mentioned in the section of findings, the total number of employees was 16 961 in 2019 and decreased to 16 693 in March 2023. Manpower shortage in the city means it will have a challenging time to support the continuous growth of the industry.

The Trend towards Decarbonisation

5.7.4 Carbon emissions from transport make up around 16% of the total emissions in Hong Kong. Climate pledges have been made by different governments all over the world to cut global energy-related carbon dioxide emissions to net zero by 2050. In order to aid in the reduction of waste and carbon emissions, the HKSAR Government has implemented various energy-saving and renewable energy measures. The whole city is increasingly held responsible for the environmental and social impact of their operations and behaviour. To help achieve net zero by the automobile industry, the HKSAR Government has been promoting

⁶ Registration and Licensing of Vehicles by Class of Vehicles, Transport Department, 06/2023, https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.td.gov.hk%2Ffilemanager%2Fen%2Fcontent_4883%2Ftable41a.xls&wdOrigin=BROWSELINK

the use of EVs by offering first registration tax concessions for EVs, including both commercial and private vehicles. On the other hand, the HKSAR Government has promulgated to cease new registrations of ICE private cars, including hybrid vehicles by 2035, and set a timeline for the public to follow.

Advancement of Technology

5.7.5 For ICE vehicles, they have been equipped with advanced technologies, including complex electronic systems, sophisticated sensors, and connectivity features. This requires specialised knowledge and expertise to diagnose and repair these vehicles effectively. Automobile service centres need to invest in continuous training for technicians and upgrade diagnostic tools and equipment to meet the demands of newer ICE vehicle models. EVs, on the other hand, require some other skill sets. Maintaining a skilled workforce and staying up-to-date with evolving automotive technologies is a challenge for the vehicle servicing sector.

EV Infrastructure

5.7.6 According to the statistics⁷ of the Environmental Protection Department, the total number of EVs is 60 943, representing about 6.6% of the total number of vehicles as of June 2023. In March 2022, the number of newly registered EVs surpassed ICE private cars for the first time, and amounted to 5%⁸ of the total private cars registered. The growing popularity of EVs in Hong Kong presents infrastructure challenges. Establishing a robust charging infrastructure is essential to support widespread adoption of EVs. However, expanding the charging network across the city requires significant investment and coordination among various stakeholders, including government bureaus and departments, utility companies, and private enterprises. Fuel and maintenance costs and convenience are the key factors for consumers in choosing vehicles. As soon as support facilities like charging stations for EVs could catch up, the public would actively consider replacing their vehicles with EVs.

5.7.7 Overcoming the above challenges requires innovative strategies, collaboration among industry stakeholders, and adaptation to changing market dynamics. Diversifying business models, and investing in training and infrastructure development are some of the key steps to address these challenges and ensure the long-term success of the automobile industry in Hong Kong.

⁷ https://www.epd.gov.hk/epd/english/environmentinhk/air/promotion_ev/promotion_ev.html#Measure

⁸ Transport Department, First Registration of Private Cars by Make, First Registration Vehicle Status, Fuel Type and Body Type, March 2022
https://www.td.gov.hk/filemanager/en/content_5149/table41e.pdf

Opportunities

A Period of Radical Change

5.7.8 There is a paradigm shift taking place in the automobile industry. In addition to electrification, vehicles in the future will be connected and autonomous. The industry will have to switch its focus from production and technical product to intelligent mobility and enhanced customer experience. There are a number of factors driving industry disruption, including time savings, increased efficiency, cost reductions, and reduced environmental impact.

Development of a Smart City

5.7.9 Increasing number of charging facilities, especially fast charging piles, would meet the growing needs of EV drivers and encourage the switch to EVs. It will also reduce the queues for charging EVs. Hong Kong is moving towards a smart city. Intelligent infrastructure and new communication technologies would enable people to enjoy a more convenient and safe travel experience. Smart cities are a big topic for the future, and with new intelligent facilities and networks to come, it would benefit the EV development and drivers. Hong Kong's emphasis on smart city initiatives opens opportunities for companies to develop and integrate connected car technologies. This includes features like vehicle-to-infrastructure communication, real-time data connectivity, and advanced navigation systems. Implementing these technologies can enhance the driving experience, improve efficiency, and provide value-added services to customers. For example, integrating real-time traffic information and smart navigation systems can help drivers optimize their routes and reduce congestion.

Autonomous Driving

5.7.10 While autonomous vehicles are still in the early stages of development, there is potential for local companies to explore autonomous driving technology and its applications in Hong Kong. This could involve partnerships with local research institutes, Government Departments, Mainland companies to test and deploy autonomous vehicles in controlled environments. The development of autonomous taxis or shuttle services could also be explored as a future mobility solution. Investing in research and development, collaborating with technology providers, and addressing regulatory challenges can be the key to unlocking the opportunities presented by autonomous vehicles.

Aftermarket Services and Maintenance

5.7.11 As the number of vehicles on the road increases, there is a corresponding demand for maintenance, repair, and customisation services. Companies can tap into this opportunity by providing customer-oriented aftermarket services such as vehicle servicing, spare parts supply, and vehicle customisation. Establishing service centers equipped with advanced diagnostics and repair technologies can ensure efficient and reliable services. Additionally, offering personalised customisation options can cater for the preferences of vehicle owners who seek unique and distinct features for their vehicles.

Charging Infrastructure Development

5.7.12 With the increasing popularity of electric vehicles, there is a need for a comprehensive and convenient charging infrastructure network. Previously, the HKSAR Government arranged a \$2 billion pilot subsidy scheme to promote installation of EV charging-enabling infrastructure (EVCEI) in car parks of existing private residential buildings. The pilot subsidy scheme, namely the “EV-charging at Home Subsidy Scheme” (EHSS), is to help car parks of existing private residential buildings with multiple ownership resolve technical and financial difficulties that are encountered frequently when retrofitting EVCEI, and further facilitate car park owners to install EV chargers of their choice for charging EVs at home in the future in a simple and easy manner. The EHSS has been well received after its launch on 21 October 2020. In order to meet the public demand, the HKSAR Government has further injected an additional funding of \$1.5 billion to the EHSS in the 2022-23 Budget, to extend the EHSS for four more years to the 2027-28 financial year. It is anticipated that the entire \$3.5 billion EHSS will be able to support installation of EVCEI for some 140,000 parking spaces in about 700 car parks of the existing private residential buildings and estates, which is about half of the eligible parking spaces in Hong Kong.

5.7.13 On the other hand, companies can seize the opportunity by investing in the development and installation of EV charging stations across the city. This includes both public charging stations in parking lots, shopping centers, and other public spaces, as well as private charging solutions for residential and commercial buildings. Offering fast-charging solutions and exploring innovative charging technologies can provide a competitive edge in the market.

New Energy Commercial Vehicles

5.7.14 With the growth of e-commerce and the increasing emphasis on sustainability, there is a need for green logistics solutions in Hong Kong. Companies can explore opportunities

to provide electric or hydrogen fuel cell commercial vehicles for last-mile deliveries. This includes developing efficient route planning algorithms, optimising delivery schedules, and implementing alternative energy sources for logistics operations. Collaborating with e-commerce platforms, logistics providers, and Government Departments can help create a comprehensive and sustainable green logistics ecosystem. For passenger transport, there are approximately 7,000 franchised public buses and 18,000 taxis in Hong Kong. Given land scarcity in Hong Kong and the long refueling time for the long-travelled vehicles, it is a challenge to locate sufficient and proper sites for charging facilities to support commercial vehicles if they are all EVs. In addition, the charging time for commercial vehicles could take very long, not to mention the short running distance after charging. Hence, other energy sources are being explored, such as hydrogen fuel cell technology, that a refill can be completed in minutes. Town gas contains 46-50% hydrogen in its chemical composition, and the existing pipelines network are widely distributed in Hong Kong. Further studies could explore upgrading the existing liquefied petroleum gas refiling stations to cater for the service need, providing a viable alternative to battery-powered electric vehicles.

5.7.15 By capitalising on these opportunities in the automobile industry in Hong Kong, companies can position themselves at the forefront of emerging trends, contribute to sustainable transportation solutions, and cater to the evolving needs of consumers. It is essential to stay updated on market developments, technological advancements, and regulatory changes to make informed business decisions and establish a competitive edge in the industry.

5.8 Manpower Projection and Annual Additional Manpower Requirement

Manpower Projection

By taking into account the historical survey data, the manpower trend for 2024-2027 is shown in Table 5.1 below. Further details of method of the manpower projection are shown in **Appendix 8**.

Table 5.1 Manpower Trend for 2024-2027

Vehicle Servicing

	Number of posts (Annual change of manpower over preceding year)			
Job level	2024	2025	2026	2027
Technologist	313 (2.00%)	313 (0.05%)	313 (0.04%)	314 (0.03%)
Technician	2 112 (3.21%)	2 112 (0.02%)	2 112 (0.01%)	2 112 (0.01%)
Craftsman and Specific Services	10 760 (0.35%)	10 797 (0.35%)	10 834 (0.34%)	10 871 (0.34%)

Auto / Parts Retail

	Number of posts (Annual change of manpower over preceding year)			
Job level	2024	2025	2026	2027
Managerial	351 (-0.65%)	349 (-0.57%)	347 (-0.5%)	345 (-0.44%)
Supervisory	451 (3.06%)	465 (2.94%)	478 (2.83%)	491 (2.72%)
Operative / Clerical Support	2 906 (-3.09%)	2 822 (-2.89%)	2 746 (-2.70%)	2 677 (-2.53%)

Annual Additional Manpower Requirement

By taking into consideration (i) the projected manpower trend and (ii) the wastage rate of the industry (i.e. percentage of employees leaving the industry permanently on annual basis), the estimated additional annual requirement from 2024 to 2027 is shown in Table 5.2 below.

Table 5.2 Estimated Annual Additional Manpower Requirement from 2024 to 2027

Vehicle Servicing

Job Level	Wastage rate of the industry	Additional Annual Manpower Requirement		
		Average manpower change (a)	Industry leavers (b)	Total (a)+(b)
Technologist ^	0% #	2	0	2
Technician ^	1.4%	17	29	46
Craftsman and Specific Services	4%	37	432	469

For technologist level, the wastage rate is zero since the no. of new experienced recruits exceeds the no. of employees left in the past year.

^ Based on the findings of the 2023 and previous rounds of manpower surveys, the business outlook of the sector, the impact of the COVID-19 pandemic, the Training Board decided to slightly adjust the weight factor (A) from the best-fitted curve of the AFM for the manpower projection at Technologist and Technician job levels for 2024 to 2027.

Auto / Parts Retail

Job Level	Wastage rate of the industry	Additional Annual Manpower Requirement		
		Average manpower change (a)	Industry leavers (b)	Total (a)+(b)
Managerial	2.0%	- 2	7	5
Supervisory	9.1%	13	42	55
Operative / Clerical Support	4.3%	-81	122	41

6 Recommendations

Based on the business outlook, and manpower supply and demand situation derived from the survey findings, the Training Board recommends the following measures to all major stakeholders to meet the industry's manpower demand.

Government

6.1 The HKSAR Government should continue providing financial incentives, such as subsidies and tax credits, to promote the adoption of EVs. These incentives can help reduce the upfront cost of purchasing EVs and make them more accessible to consumers. Additionally, the Government should continue encouraging fleet electrification of electric commercial vehicles. For charging infrastructure development, the Government can take the lead to invest in the expansion of charging infrastructure throughout the city. This includes increasing the number of public charging stations in strategic locations and collaboration with private entities to install charging stations in commercial buildings, hotels, and other high-traffic areas.

6.2 To allocate resources and funding for research and development in the automobile industry, particularly in areas such as EV technology, autonomous driving, and connected car solutions are worthy of consideration by the Government. These could be accomplished by establishing partnerships with local universities, research institutions, and private companies to drive innovation and develop cutting-edge technologies that can be integrated into the local automotive industry. In terms of regulatory support, the Government may consider streamlining regulations and procedures relating to EV adoption, charging infrastructure installation, and autonomous vehicle testing. The Government should also ensure that regulations are conducive to the development and growth of the automobile industry while maintaining safety and environmental standards. Public awareness campaigns can be arranged to educate citizens about the benefits of new energy vehicles, sustainable transportation, and the role of the automobile industry in reducing carbon emissions. This can help dispel misconceptions, promote behavioral change, and enhance public acceptance of new automotive technologies.

Training Institutions

6.3 Training institutes should provide students with industrial attachment opportunities during their studies in order to expose them to contemporary operations and practices in the automobile industry. Because of the close linkages that exist between Hong Kong and other GBA cities, it is critical that students will get more exposure in the Mainland through short-term study, industrial attachment, and cross-cultural learning. These efforts will improve

students' learning, life skills, and prospects for employment in Hong Kong or other GBA cities. International exchange programmes should be organised in addition to attaching to enterprises to expand students' learning experience, respect diverse cultures, and meet individuals of different ethnicities. Obviously, it is imperative to establish partnerships with local automobile manufacturers, dealerships, and automotive service providers. These partnerships can provide opportunities for students to gain practical experience through internships, apprenticeships, and work-study programmes. Industry professionals should be encouraged to participate in guest lectures, workshops, and mentoring programmes to bridge the gap between the academia and industry.

6.4 Institutions should also provide different levels of pre-employment training programmes from which students with varying academic achievements can pick. Aside from graduates of the Hong Kong Diploma of Secondary Education (HKDSE) Examination, who are likely to pursue higher diploma programs at Qualifications Framework (QF) level 4, some F.3 secondary school leavers may want to pursue a valuable pathway for continued studies and career development. In this regard, relevant QF level 3 programmes with adequate entry standards and curriculum should be strengthened to meet the needs. To continuously upskill automobile industry practitioners, training institutions should provide trainees with learning opportunities to satisfy various learning goals and in turn would support business growth of organisations. These programmes, including bite-sized ones, can focus on upskilling and reskilling practitioners in areas such as EV maintenance and repair, advanced diagnostics, and emerging automotive technologies. Collaboration with industry associations and organisations to design relevant and industry-certified training programmes is always welcome.

Industry and Employers

6.5 The automobile industry is experiencing the influence of technology that are shaping its landscape. To stay ahead of the competition, industry operators must keep an eye on the newest technological developments, including but not limited to AI, data analytics, IoT, EV technology, advanced diagnostics, etc. With the increasing adoption of technologies, there will be emergence of new job posts requiring a new skill set. In fact, the industry can benefit from the Reindustrialisation and Technology Training Programme (RTTP). The RTTP aims to subsidise local enterprises on a 2(Government):1(enterprise) matching basis to train their staff in advanced technologies.

6.6 In order to promote apprenticeship training and enhance the skills in vehicle maintenance, repairing, and car painting, the AUTB has been organising the Best Apprentice Competition (BAC) since 1986. In 2023, 22 final year apprentices of vehicle mechanic, vehicle electrician, vehicle body repairer and vehicle painter trades were nominated by employers to enter the competition. The BAC not only draws the interest of employers and

apprentices in quality training, but it also assists in publicising the vehicle service trades through various channels such as press releases, media interviews, and highlight videos on YouTube. Photos and videos from the competition and study trip provide excellent promotional tools for programme events.

6.7 Employer support plays a crucial role in facilitating students' transition from study to work by cultivating their collaboration spirit, problem-solving skills, practical skills, and appropriate work attitudes and values. Students can gain real-world exposure through industrial attachment opportunities. Employers can rely on the attachment opportunity to identify people with the necessary abilities for future full-time positions as well as seasonal and part-time manpower needs. Employers can assist in establishing a positive image of the automobile industry at the secondary school level in addition to attachment opportunities. The Business-School Partnership Programme (BSPP) is a good channel to promote to secondary school students. The BSPP is administered by the Education Bureau with the aim of promoting better co-operation and closer alliances between the business sector and schools. Students will be able to learn about the various major duties in the automobile industry, understand the requirements of employers, improve soft skills, and build an appropriate work attitude and values through activities provided by the business sector, such as company tours and career talks. Employers, on the other hand, should work with training institutions to organise career and industrial seminars, which are a good way to get prospective new talent. A compelling message that helps attract applicants can be generated by providing insights and explaining about the outlook of the automobile industry. At the same time, the talks provide an opportunity to raise awareness about the industry and its potential for growth, which leads to more motivated newcomers.

6.8 Employers can foster diversity and inclusion within their organisations by implementing policies that promote equal opportunities and representation. By creating an inclusive work environment with the participation of women, ethnic minority and individuals with diverse backgrounds, employers can attract a diverse talent pool and benefit from a variety of perspectives and ideas. Embracing diversity contributes to a more innovative and creative workforce, which is essential for the advancement of the automobile industry.

Employees

6.9 Employee competency and engagement increase as a result of upskilling. It can also contribute to increased productivity, as well as a higher level of job satisfaction. As a result, practitioners in the automobile industry are highly encouraged to engage in active learning and skill development. This gives employees a sense of progression and development, making their jobs more fulfilling and challenging. This, in turn, will aid in the

retention of industry talent. In addition to RTTP mentioned in para. 6.5, employees can make good use of the Engineering Graduate Training Scheme (EGTS). The EGTS provides training opportunities for engineering graduates to attain professional status from the Hong Kong Institution of Engineers (HKIE). To further encourage continuing education, practitioners who are planning to pursue higher qualifications are encouraged to join the VPlus Engineering Subsidy Scheme so as to enhance their upward mobility.

6.10 To encourage young people to join the apprenticeship scheme for industries with strong manpower demand, the VTC Earn & Learn Scheme was introduced through tripartite collaborations among employers, the Government and the VTC. It provides clear academic and career pathways for youngsters such that they could earn an attractive salary while concurrently receiving on-the-job training. To further enhance the effectiveness of the VTC Earn & Learn Scheme, the VTC has launched the Pilot Incentive Scheme to Employers (PISE) with the support of the Government. PISE offers incentives for employers who provide trainees with workplace learning and assessment under the VTC Earn & Learn Scheme, through which trainees can hone their knowledge and professional skills to meet the specific needs and new opportunities of the industries.

Membership of the Automobile Training Board

as at 31 March 2023

Chairman

Mr Wilson LAM Kit

Members

Mr CHAN Koon-tong

Mr Randolph CHAN

Mr Billy CHUNG Man-kwong

Ir FUNG Man-keung

Mr LAM Wai-kong

Mr Johnson LAU Chi-wah

Mr Esmond LO Wing-cheong

Mr NG Chiu-man

Mr Simon WONG Cheuk-fan

Ms Tania WONG Lai-wa

Mr WONG Yiu-kwong

Mr CHAN Chi-ho

Mr Peter CHEUK Chak-wai

Ir Casey LEE Kin-chung

Ir Eric WONG Lui

Ir Jimmy TANG Sek-man

Secretary

Mr William CHOW Wing-nin

Terms of Reference of Automobile 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.

Membership of Working Party on Manpower Survey

as at 31 March 2023

Convenor

Mr Simon WONG Cheuk-fan

Members

Mr LAM Wai-kong

Mr Johnson LAU Chi-wah

Mr NG Chiu-man

Ms Tania WONG Lai-wa

Mr WONG Yiu-kwong

Ir Eric WONG Lui

Mr Peter CHEUK Chak-wai

Mr LEE Hong-yip

Ir Kenny WONG Chi-hang

Secretary

Mr William CHOW Wing-nin

Definition of Terms

Employees	“Employees” refers to persons who are under the payroll of the sampled establishment / company for the specified job, disregarding whether the employees are deployed to work in other places (including the mainland of China).
Trainees	“Trainees” includes all trainees receiving any form of training and apprentices under a contract of apprenticeship.
Vacancies	“Vacancies” refers to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel at the time of survey.
Vacancy rate	“Vacancy rate” refers to vacancies as a percentage of the total number of employees and vacancies.
Turnover Rate	“Turnover rate” refers to the number of employees left as a percentage of the total number of employees and vacancies.
Average monthly income	“Average monthly income” refers to the average monthly income during the past 12 months before enumeration, including basic wages, regular overtime pay, cost of living allowance, meal allowance, meal allowance, commission and bonus etc. (less employees’ contribution to MPF). It is an average figure among employees engaging in the same principal job.
Postgraduate degree	“Postgraduate degree” refers to a higher degree(s) (e.g. master degree) offered by local or non-local education institutions, or equivalent.
First Degree	“First degree” refers to the first degree(s) offered by local or non-local education institutions, or equivalent.
Sub-degree	“Sub-degree” refers to the Associate Degree, Higher Diploma, Professional Diploma, Higher Certificate, Endorsement Certificate, Associateship or equivalent programmes offered by local or non-local institutions.
Diploma / Certificate	“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.
Secondary 4 to 6/7	“Secondary 4 to 6/7” refers to the education programmes under the Hong Kong Certificate of Education Examination (HKCEE), the Hong Kong Diploma of Secondary Education (HKDSE) Examination, Diploma Yi Jin, or equivalent.

Appendix 5 Survey Documents

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 2023 MANPOWER SURVEY OF THE AUTOMOBILE INDUSTRY****汽車業2023年人力調查**

The 2023 Manpower Survey of the Automobile Industry (AU) aims at collecting manpower information of the industry concerned for formulating recommendations on future manpower training. Please kindly provide the information of your establishment as at **1 March 2023** by answering the questionnaire. Thank you.

汽車業2023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**2023年3月1日**的人力情況填寫此問卷。多謝合作。

Establishment Information**機構資料**

NATURE OF BUSINESS: _____

業務性質

(For official use)

Industry Code _____

TOTAL NO. OF PERSONS ENGAGED: _____

僱員總人數

Principal Line of Business: (Please tick "✓" **1 box**)主要業務性質 (請剔"✓" 選**一項**)

- | | |
|--|--|
| <input type="checkbox"/> Body assembly of motor vehicles
汽車的裝嵌 | <input type="checkbox"/> Servicing and repairing of motor vehicles and motorcycles
汽車及電單車維修服務 |
| <input type="checkbox"/> Retail sale of motor vehicles
汽車零售店 | <input type="checkbox"/> Retail sale of motorcycles
電單車零售店 |
| <input type="checkbox"/> Retail sale of motor vehicle and motorcycle parts and accessories
汽車及電單車配件及零件零售店 | <input type="checkbox"/> Others (Please specify)
其他 (請註明) _____ |

Types of Vehicle engaged: (May "✓" more than one box)

經營汽車種類 (可剔"✓" 選多於一項)

- | | |
|--|--|
| <input type="checkbox"/> Internal Combustion Engine (ICE) Vehicle
內燃機汽車 | <input type="checkbox"/> Electric Vehicle (EV)
電動汽車 |
| <input type="checkbox"/> Hybrid Vehicle
混能汽車 | |

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

Please complete columns 'B' to 'E' 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'B'至'E'欄。

Part IA - Vehicle Servicing Sector 汽車維修界別

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)	(B) No. of Employees as at Survey Reference Date (Excl. trainees#)	(C) No. of Vacancies as at Survey Reference Date (Excl. trainees#)	(D) No. of Trainees# as at Survey Reference Date	(E) Average Monthly Income 每月平均收入
Wherever appropriate, the Service Classes of Voluntary Registration Scheme for Vehicle Mechanics are appended to the job titles, e.g. Vehicle Electrician (E, E(b)). 如有適當配對，「車輛維修技工自願註冊計劃」下之服務類別會列在職稱後，例如：汽車電工(E, E(b))。	在統計日期的僱員人數 (受訓者#除外)	在統計日期的空缺額 (受訓者#除外)	在統計日期的受訓者#人數	Code 編號 1 \$12,000 or below 或以下 2 \$12,001 - \$15,000 3 \$15,001 - \$20,000 4 \$20,001 - \$25,000 5 \$25,001 - \$35,000 6 \$35,001 - \$45,000 7 Over \$45,000 以上
Job Code 職位 編號 e.g: 例子: Job Title A (3 employees, 1 trainee and 2 vacancies) 職位甲 (3名僱員, 1名受訓者及2個空缺)	Please enter a zero '0' in the box if there is no employee /vacancy/trainee. 如沒有僱員/空缺/受訓者，請在方格內填入'0'。			
	3	2	1	5
Technologist Level 技師級				
Technologists in the automobile industry are mostly engineers and service managers who have reached a level of professional competence in the discipline of mechanical or road transport engineering recognized by the appropriate professional institutions. 技師通常擔任工程師和維修部經理職務，具備機械工程或道路交通工程的專業才幹，獲專業學會認可。				
101 Mechanical Engineer (Automotive) 汽車機械工程師				
102 Service Manager 維修部經理				
103 Software Product Support Engineer 軟體產品支援工程師				
104 Field Support Engineer 外勤支援工程師				
Technician Level 技術員級				
Technicians are persons whose education, practical training and experience enable them to apply proven techniques and procedures and to carry a measure of technical responsibility, normally under the supervision of a technologist. 技術員有一定的教育水平及實務訓練，具備工作經驗，一般能夠在技師督導下，運用已確立的技術及程序執行技術任務。				
201 Service Instructor 維修教導員				
202 Motor Vehicle Examiner / Tester 汽車檢查員/測試員				
203 Service Supervisor 維修監督				
204 Service Adviser / Receptionist 維修服務員/款待員				
205 Engineering Technician 工程技術員				
206 Remanufacturing Engineering Technician 再製造工程技術員				
207 Field Service Technician - Energy Products 外勤服務技術員 - 能源產品				

The term "trainees" includes all trainees receiving any form of training and apprentices under a contract of apprenticeship.
「受訓者」包括正在接受各種訓練的人士，以及簽有學徒合約的登記學徒。

Part IA - Vehicle Servicing Sector (continued) 汽車維修界別 (續)

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)	(B) No. of Employees as at Survey Reference Date (Excl. trainees#) 在統計日期 的僱員人數 (受訓者#除外)	(C) No. of Vacancies as at Survey Reference Date (Excl. trainees#) 在統計日期的 空缺額 (受訓者#除外)	(D) No. of Trainees# as at Survey Reference Date 在統計日期的 受訓者#人數	(E) Average Monthly Income 每月平均收入 Code 編號 1 \$12,000 or below 或以下 2 \$12,001 - \$15,000 3 \$15,001 - \$20,000 4 \$20,001 - \$25,000 5 \$25,001 - \$35,000 6 \$35,001 - \$45,000 7 Over \$45,000 以上
Wherever appropriate, the Service Classes of Voluntary Registration Scheme for Vehicle Mechanics are appended to the job titles, e.g. Vehicle Electrician (E, E(b)). 如有適當配對，「車輛維修技工自願註冊計劃」下之服務類別會列在職稱後，例如：汽車電工(E, E(b))。	Please enter a zero '0' in the box if no employee /vacancy/trainee. 如沒有僱員/空缺/受訓者，請在方格內填入 '0'。			
Job Code 職位 編號	Craftsman Level 技工級			
Craftsmen require both a high degree of practical skills and sound technical knowledge if they are to venture into new skills resulting from technological advancement. They need to have a general education of at least completion of Secondary 3. 技工須精於實務，並具備相當的技術知識，方可學習新技能以配合最新的科技發展。技工最少需具備中三程度。				
301	Vehicle Mechanic 汽車機械工 (M, M(b))			
302	Vehicle Electrician 汽車電工 (E, E(b))			
303	Vehicle Body Repairer 車身修理工 (B1, B1(b))			
305	Vehicle Painter 汽車噴漆工 (B2, B2(b))			
Specific Services 專項服務				
304	Vehicle Body Builder 車身建造工 (S7)			
306	Vehicle Air-conditioning Mechanic 汽車冷氣工 (S6)			
307	Vehicle Upholsterer 車內裝飾工			
309	Industrial Vehicle Mechanic 工業機車技工			
310	Motocycle Mechanic 電單車機械工 (S1)			
401	Tyre Worker / Battery Worker 輪胎工 (S2) / 電池工 (S3)			
403	Lubrication Worker 更換機油工 (S4)			
404	Car Accessories Worker 車輛配件工 (S5)			
405	Car Detailing Worker 汽車美容工			
Unskilled Level 非技術工人級				
501	Customer Services Ambassador / Assistant 客戶服務大使/助理			
502	General Worker / Cleaner 雜工/清潔工			
Other Relevant Vehicle Servicing Staff 其他相關汽車維修人員				
For Official Use				

The term "trainees" includes all trainees receiving any form of training and apprentices under a contract of apprenticeship.
「受訓者」包括正在接受各種訓練的人士，以及簽有學徒合約的登記學徒。

Part IB - Auto / Parts Retailers Sector 汽車／零件零售界別

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。

Job Code 職位編號	(A) Principal Job 主要職務 (See Appendix B) (參閱附錄 B)	(B) No. of Employees as at Survey Reference Date 在統計日期 的僱員人數	(C) No. of Vacancies as at Survey Reference Date 在統計日期的 空缺額	(E) Average Monthly Income 每月平均收入
	Please enter a zero '0' in the box if there is no employee /vacancy. 如沒有僱員／受訓者，請在方格內填入 '0'。			Code 編號 1 \$12,000 or below 或以下 2 \$12,001 - \$15,000 3 \$15,001 - \$20,000 4 \$20,001 - \$25,000 5 \$25,001 - \$35,000 6 \$35,001 - \$45,000 7 Over \$45,000 以上
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
Managerial Level 經理級				
111	Owner / Sole Proprietor / Working Partner 東主／獨資經營者／執行合夥董事			
112	General Manager 總經理			
113	Sales Manager 營業經理			
114	Marketing Manager 市場推廣經理			
115	Customer Services Manager 客戶服務經理			
116	Merchandising Manager 採購經理			
117	Parts Manager 零件經理			
Supervisory Level 主任級				
211	Store / Branch Supervisor 店舖／分店營業主任			
212	Customer Services Supervisor 客戶服務主任			
213	Merchandiser / Buyer 採購主任			
214	Parts / Logistics / Distribution / Warehouse Supervisor 配件／物流／運輸／倉庫主任			
215	Marketing Officer 市場推廣主任			
Operative / Clerical Support Level 技術人員／文員級				
511	Senior Sales Representative / Staff 高級營業員／售貨員			
512	Junior Sales Representative / Staff 初級營業員／售貨員			
513	Stock Assistant 存貨助理			
514	Sales / Service Staff (Part Time) 售貨員／服務員(兼職)			
515	Other Clerks / Supporting Staff 其他文員／輔助人員			
For Official Use				

The term "trainees" includes all trainees receiving any form of training and apprentices under a contract of apprenticeship.
「受訓者」包括正在接受各種訓練的人士，以及簽有學徒合約的登記學徒。

Part II 第二部份

Business Environment 行業概況

1. Please indicate your views on the expected change in business volume of your establishment in the next 12 months (please tick in the box as appropriate) and indicate the reasons leading to a better or a worse business environment.
請指出 貴機構在未來十二個月業務額的預期變化 (請在適當的格內填上“✓”號)及引起較佳或較差的原因。

- Better (Please state reasons)
較佳 (請說明原因) _____
- Stable
穩定
- Worse (Please state reasons)
較差 (請說明原因) _____
- Uncertain
不肯定

Recruitment

招聘

2. Please state the number of Full Time employees who were newly recruited in the past 12 months.
請列出 貴機構在過去十二個月內新招聘的全職僱員人數。

	Vehicle Servicing Sector 汽車維修界別			
	<u>Technologist Level</u> 技師級	<u>Technician Level</u> 技術員級	<u>Craftsman Level</u> 技工級	<u>Specific Services</u> 專項服務
(a) Total number of recruits 總招聘人數				
(b) Number of recruits who have performed related duties in their last job 當中入職前是從事相關職務的人數				

	Auto / Parts Retail Sector 汽車/零件零售界別		
	<u>Managerial Level</u> 經理級	<u>Supervisory Level</u> 主任級	<u>Operative / Clerical Support Level</u> 技術人員/文員級
(a) Total number of recruits 總招聘人數			
(b) Number of recruits who have performed related duties in their last job 當中入職前是從事相關職務的人數			

Employees Left

離職人數

3. Please state the number of Full Time employees who left in the past 12 months.
請列出 貴機構在過去十二個月內全職僱員的離職人數。

	Vehicle Servicing Sector 汽車維修界別			
	<u>Technologist Level</u> 技師級	<u>Technician Level</u> 技術員級	<u>Craftsman Level</u> 技工級	<u>Specific Services</u> 專項服務
No. of employees left 離職僱員人數				

	Auto / Parts Retail Sector 汽車/零件零售界別		
	<u>Managerial Level</u> 經理級	<u>Supervisory Level</u> 主任級	<u>Operative / Clerical Support Level</u> 技術人員/文員級
No. of employees left 離職僱員人數			

Part III - For Vehicle Servicing Sector (Please answer questions 4 to 7 of this part if manpower exists in part IA)
第三部份 – 適用於汽車維修界別 (如IA部份有填報僱員，請回答第三部份問題4至7)

Major Difficulties Encountered in Recruitment
主要招聘困難

4. Please indicate the difficulties encountered in recruitment of full-time employees of your establishment in the past 12 months.
 請指出 貴機構在過去十二個月招聘全職僱員時所遇到的困難。

	<u>Reasons</u> 原因	Technologist Level 技師級	Technician Level 技術員級	Craftsman Level 技工級	Specific Services 專項服務
(a)	No recruitment was taken place 沒有招聘	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b)	Recruitment was taken place and did not encounter difficulties 有招聘，並沒有遇到招聘困難	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c)	Recruitment was taken place and the difficulties encountered were: (You may “√” one or more options) 有招聘及遇上以下招聘困難: (可剔“√”選多於一項)				
(i)	Candidates had more choices in the market 應徵者在市場上有很多選擇	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii)	Candidates lacked the relevant academic qualification and credential 應徵者缺乏相關學歷及專業資格	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iii)	Candidates found the remuneration package and fringe benefit not attractive 應徵者認為薪酬及附帶福利欠吸引	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iv)	Candidates were unsatisfied with the working environment in the industry 應徵者認為行業的工作環境不理想	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(v)	Candidates lacked awareness of career opportunities & prospect in the industry 應徵者不了解行業的就業及發展機會	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(vi)	Insufficient programmes available in the market to provide trained manpower in the industry 市場缺乏課程提供具相關訓練的人力資源	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(vii)	Competition for manpower from the Mainland/Macao/other cities 源自內地/澳門/其他城市之人手競爭	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(viii)	Others (please specify) 其他(請說明) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Preferred Level of Education and Years of Experience of Employees
僱員宜有的教育程度及訓練期

5. Please choose preferred Level of Education, Years of experience of employees (not as a trainee).
請選擇僱員 (非受訓者) 宜有的教育程度及年資。

Job level 職級	Technologist Level 技師級	Technician Level 技術員級	Craftsman Level 技工級	Specific Services 專項服務
(a) Level of Education (Please tick “√” 1 box for each job level) 教育程度 (每職級請別“√” 選一項)				
(i) Postgraduate Degree 研究生學位	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) First Degree 學士學位	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iii) Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iv) Diploma/Certificate 文憑/證書	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(v) Secondary 4 to 7 中四至中七	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(vi) Secondary 3 or below 中三或以下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Years of Experience (Please tick “√” 1 box for each job level) 年資 (每職級請別“√” 選一項)				
(i) 10 years or above 十年或以上	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) 6 to less than 10 years 六年至十年以下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iii) 3 to less than 6 years 三年至六年以下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iv) 1 year to less than 3 years 一年至三年以下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(v) Less than 1 year 一年以下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Training Requirements of Personnel of the Vehicle Servicing Sector
汽車維修界別人員的訓練需要

6. Please indicate the training areas and urgency (if applicable) for personnel of the vehicle servicing sector.
 請選出汽車維修界別人員所需要的訓練及其迫切性(如適用)。

Urgently required 迫切需要 – UR; Required 需要 – R; Not required 不需要 – NR

Training area 訓練範疇	Technologist Level 技師級			Technician Level 技術員級			Craftsman Level 技工級			Specific Services 專項服務		
	UR	R	NR	UR	R	NR	UR	R	NR	UR	R	NR
(a) Vehicle Mechanic 汽車機械 (ICE) (內燃機汽車)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Vehicle Electronics 汽車電器 (ICE) (內燃機汽車)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) Electrical and Electronic Systems (EV/ Hybrid) 電力及電子系統 (電動車/混能車)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d) Vehicle Body Repairing 車身維修	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(e) Vehicle Painting 汽車噴漆	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(f) Diagnosis using computers 使用電腦進行診斷	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(g) Safety for vehicle servicing 汽車維修工作安全	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(h) English 英語	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(i) Others (please specify) 其他 (請說明)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Supplementary Manpower information of EV and / or Hybrid Maintenance
電動車及/或混能車維修的附加人力資料

7. Please fill in the number of qualified EV and/ or hybrid vehicle maintenance workers (who have received training from manufacturer(s)) in your organisation.
 請填寫 貴機構內合資格(指曾接受廠方訓練)的電動車及/或混能車維修人員的人數。

	Technologist Level 技師級	Technician Level 技術員級	Craftsman Level 技工級
EV 電動車			
(a) Number of qualified workers as at survey reference date 統計日期時人員數量			
(b) Estimated number of qualified workers required in the next 3 years 預計未來3年所需人員數量			
Hybrid 混能車			
(c) Number of qualified workers as at survey reference date 統計日期時人員數量			
(d) Estimated number of qualified workers required in the next 3 years 預計未來3年所需人員數量			

Part IV - For Auto / Parts Retailers Sector (Please answer questions 8 to 10 of this part if manpower exists in part IB)
 第四部份 – 適用於汽車／零件零售界別 (如 IB 部份有填報僱員，請回答第四部份問題 8 至 10)

Major Difficulties Encountered in Recruitment
 主要招聘困難

8. Please indicate the difficulties encountered in recruitment of full-time employees of your establishment in the past 12 months.
 請指出 貴機構在過去十二個月招聘全職僱員時所遇到的困難。

<u>Reasons</u> 原因	Managerial Level 經理級	Supervisory Level 主任級	Operative / Clerical Support Level 技術人員/ 文員級
(a) No recruitment was taken place 沒有招聘	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Recruitment was taken place and did not encounter difficulties 有招聘，並 沒有遇到 招聘困難	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) Recruitment was taken place and the difficulties encountered were: (You may “√” one or more options) 有招聘及遇上以下招聘困難: (可剔“√”選多於一項)			
(i) Candidates had more choices in the market 應徵者在市場上有很多選擇	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Candidates lacked the relevant academic qualification and credential 應徵者缺乏相關學歷及專業資格	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iii) Candidates found the remuneration package and fringe benefit not attractive 應徵者認為薪酬及附帶福利欠吸引	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iv) Candidates were unsatisfied with the working environment in the industry 應徵者認為行業的工作環境不理想	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(v) Candidates lacked awareness of career opportunities & prospect in the industry 應徵者不了解行業的就業及發展機會	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(vi) Insufficient programmes available in the market to provide trained manpower in the industry 市場缺乏課程提供具相關訓練的人力資源	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(vii) Competition for manpower from the Mainland/Macao/other cities 源自內地／澳門／其他城市之人手競爭	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(viii) Others (please specify) 其他 (請說明) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Preferred Level of Education and Years of Experience of Employees
僱員宜有的教育程度及年資

9. Please choose preferred Level of Education and Years of Experience of employees.
 請選擇僱員宜有的教育程度及年資。

Job level 職級	Managerial Level 經理級	Supervisory Level 主任級	Operative / Clerical Support Level 技術人員／文員級
(a) Level of Education (Please tick “√” 1 box for each job level) 教育程度 (每職級請剔“√” 選一項)			
(i) Postgraduate Degree 研究生學位	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) First Degree 學士學位	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iii) Sub-degree (e.g. Higher Diploma) 副學位 (例如高級文憑)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iv) Diploma/Certificate 文憑／證書	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(v) Secondary 4 to 7 中四至中七	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(vi) Secondary 3 or below 中三或以下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Years of Experience (Please tick “√” 1 box for each job level) 年資 (每職級請剔“√” 選一項)			
(i) 10 years or more 十年或以上	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) 6 years to less than 10 years 六年至十年以下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iii) 3 years to less than 6 years 三年至六年以下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iv) 1 year to less than 3 years 一年至三年以下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(v) Less than 1 year 一年以下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Training Requirements of Personnel of the Auto / Parts Retail Sector
汽車／零件零售界別人員的訓練需要

10. Please indicate the training areas and urgency (if applicable) for personnel of the Auto / Parts Retail Sector.
 請選出汽車／零件零售界別人員所需要的訓練及其迫切性(如適用)。

Urgently required 迫切需要 – UR; Required 需要 – R; Not required 不需要 – NR

Training area 訓練範疇	Managerial Level 經理級			Supervisory Level 主任級			Operative / Clerical Support Level 技術人員／文員級		
	UR	R	NR	UR	R	NR	UR	R	NR
(a) Customer Service 客戶服務	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Selling Skills 銷售技巧	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) Automotive Fundamentals 基礎汽車原理	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d) Automotive Body Treatments 汽車車身處理	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(e) Finance and Insurance of Automotive Trade 汽車保險、財務	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(f) English , Putonghua 英語、普通話	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(g) Others (please specify) 其他(請說明)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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 2023 Manpower Survey of the Automobile Industry
汽車業 2023 年人力調查

Explanatory Notes
附註

Part I
第一部份

1. 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 for principal jobs, 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) Please add in column 'A' titles of any principal jobs not mentioned in job descriptions (Appendix B); briefly describe them in respect of the appropriate job categories.
如 貴機構另有技術性主要職務未載於工作說明（附錄 B），請一併填入 'A' 欄內，並簡述其所屬的職務類別及等級。
- (c) The job titles may not be the same as those adopted by your company, but if the description of a certain job in your company is the same or substantially the same as the job description of, for example, Vehicle Mechanic, then for the purpose of this survey you should regard the job holder as a Vehicle Mechanic regardless of his/her actual title in your company.
調查表所列的職稱可能與 貴公司所採用的有別，但如 貴公司某職務的工作性質與調查表所載職務（例如「汽車機械工」）相同或相近，則擔任該職務者不論在 貴公司的實際職稱為何，在是次調查中亦應歸類為「汽車機械工」。
- (d) In the event where an employee's duties in your company are split between two or more job titles, please use the job title that best describes his/her principal responsibility.
如 貴公司有員工身兼多項職責，請選用最能反映其主要職責的職稱。

2. Number of Employees as at Survey Reference Date (Excl. trainees) - Column 'B'
在統計日期的僱員人數（受訓者除外） —— 'B' 欄

For each principal job, please fill in the total number of employees (excluding trainees) as at survey reference date.
請填寫 貴機構於統計日期僱用的每個主要職務的僱員總數（受訓者除外）。

'Employees' include proprietors, partners and unpaid family members working for your company. This definition also applies to 'employee(s)' appearing in other parts of the questionnaire.

「僱員」包括在公司內工作的東主、合夥人及涉及業務的無薪家庭成員。調查表他處出現的「僱員」一詞，定義亦同。

3. Number of Vacancies at Survey Reference Date (Excl. trainees) - Column 'C'
在統計日期的空缺額（受訓者除外） —— 'C' 欄

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

請填上在統計日期每一主要職務的空缺額（受訓者除外）。「統計日期的空缺額」是指該職位於統計日期仍懸空，須立刻填補，而現正積極招聘人員填補。

4. Number of Trainees as at Survey Reference Date - Column 'D' (Vehicle Servicing Sector)

統計日期的受訓者人數—— 'D' 欄 (汽車維修界別)

Please fill in the number of employees undergoing training for each type of jobs as at survey reference date.
請填寫於統計日期正在接受訓練的僱員人數。

The term 'trainees' includes all trainees receiving any form of training and apprentices under a contract of apprenticeship.

「受訓者」包括正在接受各種訓練的人士以及簽有學徒合約的登記學徒。

5. Average Monthly Income Range of Employees - Column 'E'

僱員每月平均收入—— 'E' 欄

Please enter the code of average monthly income range during the past 12 months for each principal job of employees. This should include basic wages, regular overtime pay, cost of living allowance, meal allowance, commission and bonus etc. (less employees' contribution to MPF). If you have more than one employee doing the same job, please enter the average range.

請在 'E' 欄填入每個主要職務僱員 過去十二個月 每月平均收入幅度的編號，這包括底薪、恆常發放的超時工作補薪、生活津貼、膳食津貼、佣金及花紅等（扣除僱員所支付的強制性公積金供款）。若從事同類工作的僱員多於一名，則請取其平均收入。

Part III

第三部份

4. Question 7 – Preferred Level of Education, Mode of Training and Period of Training of Employees

問題 7 —— 僱員宜有的教育程度、訓練方式及訓練期

In question 7, please tick the boxes the preferred level of education, mode of training and period of training which an employee in each of the four job levels (i.e. technologist level, technician level, craftsman level and specific services) should have if he/she was to carry out his/her work competently. (Please tick 1 box for each job level).

請在問題 7 之方格內選擇技師級、技術員級、技工級及專項服務的僱員宜具備何種教育程度、訓練方式及訓練期，才能勝任其工作。（每職級請別選一項）

Part IV

第四部份

5. Question 11 – Preferred Level of Education and Year of Experience of Employees

問題 11 —— 僱員宜有的教育程度及年資

In question 11, please tick the boxes the preferred level of education and year of experience which an employee in each of the three job levels (i.e. managerial level, supervisory level and operative/clerical support level) should have if he/she was to carry out his/her work competently. (Please tick 1 box for each job level).

請在問題 11 之方格內選擇經理級、主任級及技術人員／文員級的僱員宜具備何種教育程度及年資，才能勝任其工作。（每職級請別選一項）

6. Definition of Preferred Level of Education

宜有的教育程度的定義

- ◆ “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 Jin, 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。

Code No. 編號	Job Title 職稱	Job Description 工作說明
TECHNOLOGIST LEVEL (Continued) 技師級 (續)		
		<p>(v) 進行檢查及測試，評估設備性能以及提供技術方面的意見；</p> <p>(vi) 為大型車隊訂定預防性維修計劃；</p> <p>(vii) 負責管理汽車維修機構內一切工程及有關事宜，包括工作安全及員工健康。</p>
102	<p>Service Manager</p> <p>維修部經理</p>	<p>Manages all commercial and technical activities of an organization engaged in motor vehicle repairs and servicing, including safety and health matters.</p> <p>負責管理汽車維修機構內一切業務及技術方面的工作，包括工作安全及員工健康。</p>
103	<p>Software Product Support Engineer</p> <p>軟體產品支援工程師</p>	<p>Diagnoses in depth complex software or hardware issues with the vehicle infotainment system (user interface, media, navigation, connectivity, software updates, and audio) and gather data to evaluate trends and potential impact.</p> <p>負責深入診斷車輛資訊娛樂系統（使用者介面、媒體、導航、連接、軟體更新和音訊）的複雜軟體或硬體問題，並收集資料以評估趨勢和潛在影響。</p>
104	<p>Field Support Engineer</p> <p>外勤支援工程師</p>	<p>Debugs systems and perform diagnostics on field failures both remotely and directly in the field. Provides technical support in order to minimize vehicle downtime.</p> <p>負責為系統進行調試及對現場故障進行遠端和直接診斷。提供技術支援，以盡量減少車輛停駛時間。</p>
TECHNICIAN LEVEL 技術員級		
201	<p>Service Instructor</p> <p>維修教導員</p>	<p>Instructs apprentices, trainees and other employees in motor vehicle servicing and repairs.</p> <p>教導學徒、受訓者及其他僱員有關汽車維修的知識及技能。</p>

Code No. 編號	Job Title 職稱	Job Description 工作說明
TECHNICIAN LEVEL (Continued) 技術員級 (續)		
202	Motor Vehicle Examiner/Tester 汽車檢查員／測試員	Inspects and tests motor vehicles for their conditions and road-worthiness compliance, including inspection before and after repairs, as well as testing in compliance with legal requirements. 檢查及測試汽車的狀況和路面行駛性能，包括維修前或維修後檢查或測試有關車輛是否符合法律的規定。
203	Service Supervisor 維修監督	Performs supervisory duties contributory to: (i) the planning and allocation of tasks to foremen and other employees, (ii) the inspection, servicing and repairs of motor vehicles, and (iii) the installation and maintenance of workshop equipment. 執行下列監督工作，以便協助： (i) 策劃及分配工作予管工及其他僱員； (ii) 檢查與維修汽車； (iii) 安裝與維修工場設備。
204	Services Adviser/ Receptionist 維修服務員／款待員	Records customers' requirements, recommends repairs and servicing, advises and liaises with customers regarding progress of work. 記錄顧客的要求，建議適當的維修服務，並與顧客聯絡，知會有關工作的進展。
205	Engineering Technician	Performs technical tasks contributory to the modification or improvement work on vehicles, the design, installation and maintenance of workshop facilities, and technical support for vehicle servicing, either independently or under the direction of a mechanical engineer (automotive) or a service manager.

Code No. 編號	Job Title 職稱	Job Description 工作說明
TECHNICIAN LEVEL (Continued) 技術員級 (續)		
	工程技術員	獨立或在汽車機械工程師／維修部經理的指導下執行技術職務，以協助進行：汽車的改裝或改良；工場設備的設計、安裝及維修；汽車維修方面的技術支援。
206	Remanufacturing Engineering Technician 再製造工程技術員	Performs diagnostics, field support, on-site high-voltage battery repair, and incident response. Responsible for determining the root failures of complex electromechanical assemblies 執行診斷、現場支援、現場高壓電池維修和事故應變。負責確定複雜機電元件的故障根源
207	Field Service Technician - Energy Products 外勤服務技術員 - 能源產品	Troubleshoots and repairs equipment as defined by the service engineering team and performs complex and precise electro-mechanical debug, rework and repair. 按照服務工程團隊的規定，對設備進行故障排除和維修，並進行複雜和精確的機電調試、修改和維修。
CRAFTSMAN LEVEL 技工級		
301	Vehicle Mechanic 汽車機械工 (M, M(b))	Services and repairs all types of vehicles. 維修各類型汽車。
302	Vehicle Electrician 汽車電工(E, E(b))	Services and repairs electrical and electronic systems and components of motor vehicles. 維修汽車電氣、電子系統和組件。
303	Vehicle Body Repairer 車身修理工 (B1, B1(b))	Repairs motor vehicle bodies. 修理汽車車身。
305	Vehicle Painter 汽車噴漆工 (B2, B2(b))	Prepares and paints vehicle bodies. 負責噴漆前的準備工作以及噴塗車身。
SPECIFIC SERVICES 專項服務		
304	Vehicle Body Builder 車身建造工 (S7)	Constructs and converts motor vehicle bodies. 建造與改裝汽車車身。

Code No. 編號	Job Title 職稱	Job Description 工作說明
SPECIFIC SERVICES (Continued) 專項服務 (續)		
306	Vehicle Air-Conditioning Mechanic 汽車冷氣工 (S6)	Installs, services and repairs vehicle air-conditioners. 安裝與維修汽車冷氣機。
307	Vehicle Upholsterer 車內裝飾工	Provides seats, seat covers, floor covers and interior trim in vehicles. 製造及裝設車椅、車椅面、車地板面及車內一切裝飾。
309	Industrial Vehicle Mechanic 工業機車技工	Services and repairs all types of industrial vehicles (e.g. fork lift truck, straddle carrier, shovel loader, etc.). 維修各類型工業機車（例如：叉式鏟車、貨櫃搬機車及鏟鬥式裝載車等）。
310	Motorcycle Mechanic 電單車機械工 (S1)	Services and repairs motorcycles. 維修電單車。
401	Tyre Worker / Battery Worker 輪胎工 (S2) / 電池工 (S3)	Replaces and repairs vehicle tyres, tests and replaces vehicle batteries. 更換及維修汽車輪胎，測試及更換汽車電池。
403	Lubrication Worker 更換機油工 (S4)	Replaces lubrication oils for vehicles. 更換汽車機油。
404	Car Accessories Worker 車輛配件工 (S5)	Installs and repairs vehicle accessories, e.g. audio, bugler alarm system, etc. 安裝及維修汽車配件，如音響、防盜系統等。
405	Car Detailing Worker 汽車美容工	Cleans, polishes and waxes vehicles. 為汽車清潔，拋光和打蠟。

Code No. 編號	Job Title 職稱	Job Description 工作說明
UNSKILLED LEVEL 非技術工人級		
501	Customer Services Ambassador / Assistant 客戶服務大使／助理	Welcomes customers and handles enquiries. Assists in customer services activities. 招待客戶和處理查詢。協助客戶服務工作。
502	General Worker/ Cleaner 雜工／清潔工	Performs duties of a general nature not requiring any training or skill, such as cleaning and polishing of motor vehicles after repairs and servicing, and tidying up garage. 擔任不需專門訓練或技能的一般性質工作，例如汽車維修後的清抹，以及車房的清潔工作。

B. Auto / Retails Sector

Code No. 編號	Job Title 職稱	Job Description 工作說明
MANAGERIAL LEVEL 經理級		
111	Owner / Sole Proprietor / Working Partner 東主／獨資經營者／執行合夥董事	Owns and runs the business. 擁有和經營業務。
112	General Manager 總經理	Assumes total responsibility for retail operations, merchandising, sales and marketing functions. 負責機構內零售業務、採購、銷售和市場推廣所有事宜。
113	Sales Manager 營業經理	Plans, directs and manages sales-related activities aiming at maximizing sales. Directly contacts clients to promote sales. 策劃、指導和管理有關銷售的工作，以盡量提升營業額。直接聯絡客戶，以推廣業務。
114	Marketing Manager 市場推廣經理	Plans, directs and manages marketing functions including advertising, public relations and corporate communications. 策劃、指導和管理市場推廣工作，包括廣告、公共關係及企業傳訊。
115	Customer Services Manager 客戶服務經理	Plans, organizes, directs and controls activities relating to customer services. Contacts customers, liaises with internal departments to ensure provision of high standard customer services. 策劃、組織、指導客戶服務工作。聯絡客戶及公司內部門，確保客戶服務達到理想水準。
116	Merchandising Manager 採購經理	Plans, organizes, directs and controls merchandising or buying activities. Assesses market demand by carrying out market surveys or studies. Contacts suppliers, coordinates with appropriate departments to ensure continuity and quality of merchandise supply. 策劃、組織、監管採購工作。調查和研究市場情況，以釐訂需求。聯絡供應商，協調有關部門工作，確保貨源充足，並符合品質要求。

Code No. 編號	Job Title 職稱	Job Description 工作說明
MANAGERIAL LEVEL (Continued) 經理級 (續)		
117	Parts Manager 零件經理	Manages spare parts business operation, inventory control and warehouse management to serve internal and external customers. 管理零部件業務操作，庫存控制和倉庫管理，以服務內部和外部客戶。
SUPERVISORY LEVEL 主任級		
211	Store / Branch Supervisor 店舖／分店營業主任	Responsible for the sale of a particular merchandise or a range of merchandises in a store/outlet. Checks and studies sales figures, stock and customers' preference and makes subsequent recommendations. Supervises a team of sales staff. 負責某種貨品或數種貨品在一間店舖／經銷店的銷售。查核和研究銷售數字、貨品存貨及顧客要求，然後提出建議。監督一組售貨員的工作。
212	Customer Services Supervisor 客戶服務主任	Supervises and implements activities relating to customer services. Provides services directly to customers. 監督、推行與客戶服務有關的工作。直接向客戶提供服務。
213	Merchandiser / Buyer 採購主任	Responsible for merchandising or buying functions. Liaises and negotiates with suppliers and appropriate departments to ensure continuity and quality of merchandise supply. 負責商品採購工作。與供應商及有關部門聯絡洽商，確保貨源充足，並符合品質要求。
214	Parts / Logistics / Distribution/ Warehouse Supervisor 配件／物流／運輸／倉庫主任	Engaged in promotion and effect of the sales of automotive parts and accessories. Supervises logistics, distribution and warehousing of merchandise to achieve planned levels of services to users and customers. 推銷、出售汽車零件及附件。監督貨品的物流、運輸及存倉工作，以便為使用者及顧客提供有系統服務。

Code No. 編號	Job Title 職稱	Job Description 工作說明
215	Marketing Officer 市場推廣主任	Implements marketing functions including advertising, public relations and corporate communications. 執行市場推廣工作，包括廣告、公共關係及企業傳訊。
OPERATIVE/CLERICAL SUPPORT LEVEL 技術人員／文員級		
511	Senior Sales Representative / Staff 高級營業員 / 售貨員	Sells merchandise, provides customer service, and / or operates cash register in retail store. Typically has more sales experiences and/or good sales records. (If companies do not have their own system of classification, sales staff having 5 years or more relevant experience in the industry will be classified as senior.) 在零售店／經銷店售賣貨品，提供顧客服務及／或負責收銀工作；具較多銷售經驗及／或良好銷售紀錄。（如公司沒有特別說明，具五年或以上相關經驗者為高級售貨員）
512	Junior Sales Representative / Staff 初級營業員 / 售貨員	Sells merchandise, provides customer service, and / or operates cash register in retail store. Usually has less sales experience. (If companies do not have their own system of classification, sales staff having less than 5 years of relevant experience in the industry will be classified as junior.) 在零售店／經銷店售賣貨品，提供顧客服務及／或負責收銀工作；通常銷售經驗較少。（如公司沒有特別說明，具少於五年相關經驗者為初級售貨員）
513	Stock Assistant 存貨助理	Delivers and receives merchandise, arranges storage, fills up shelves in warehouse and / or in stores. 收發貨品，安排儲存，添補貨倉及／或店舖貨架的存貨。
514	Sales / Service Staff (Part-time) 售貨員／服務員 (兼職)	Employed on part time basis. Sells merchandise, provides customer service, and / or operates cash register in retail store. 以兼職方式受僱。在零售店／經銷店售賣貨品，提供顧客服務及／或負責收銀工作。

Code No. 編號	Job Title 職稱	Job Description 工作說明
OPERATIVE/CLERICAL SUPPORT LEVEL (Continued) 技術人員／文員級（續）		
515	Other Clerks / Supporting Staff 其他文員／輔助人員	Clerks/Supporting Staff involve in secretarial, accounting, finance, IT or other administrative work. 參與秘書、人事、會計、財務、資訊科技或其他行政工作的文員。

- The End /完 -

Quality Control Measures

Prior to fieldwork preparation

- Collect contact information of the sampled establishments
- Group sampled establishments to the same business organisation

Thorough training of fieldwork staff

- Industry briefing workshop by VTC
- Intensive briefing and training sessions by MOV in consultation with VTC

Monitoring of the fieldwork execution

- Well-trained enumerators who are experienced in conducting establishment surveys
- Closely monitor fieldwork progress and work of enumerators
- Debriefing sessions twice a week

Measures to increase the response rate

- Strategic directions given by VTC
- Assistance from the Training Boards and trade associations, etc.

Checking of the completed questionnaires

- Sample check of completed questionnaires by an independent team of QC checkers
- 100% vetting of the completed questionnaires by VTC

Double data entry and data validation

- Double data entry system
- Validation of collected data via computer programming and systems

Data analysis by VTC

- Comparison of survey findings with last round
- Benchmarking with relevant manpower information (if deemed appropriate)

Response Profile

Sector	(a) No. of Valid Cases*	(b) No. of Establishments Successfully Enumerated	(b)/(a) Effective Response Rate
Vehicle Servicing Sector	235	233	99.1%
Auto / Parts Retail Sector	119	119	100.0%
Other Organisations e.g. Government departments, companies of public utility, transportation companies, and educational institutions employing workers of Automobile industry	21	19	90.5%
Overall	375	371	98.9%

Note: * Excluding establishments which had ceased operation, had not employed any automobile staff, etc. at the time of survey.

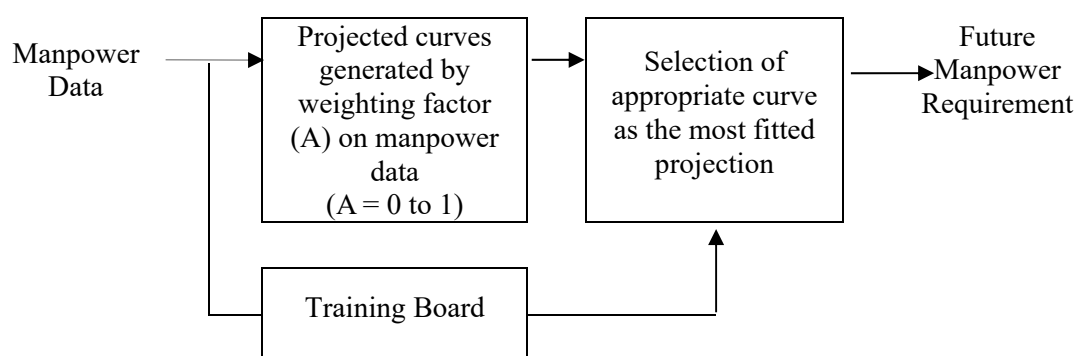
Manpower Projection Methodology

The 'Adaptive Filtering Method' (AFM) is a forecasting method which rested on the principle of "Weighted Exponential Smoothing". In this method, past manpower data are weighted. Heavier weightings are given to the data from more recent surveys.

Thus, the forecast is more dependent on the more recent manpower information. The degree of emphasis on the more recent survey data can however be varied by adjusting the weighting factor (A). The higher the value of 'A', the heavier the weightings of the more recent data are.

Finally, the forecast may also be optimised to suit decisions by training boards based on factors such as market trends, technological development, social-economical factors, future expectations and so on. The method is illustrated in *Figure 1 below*

Figure 1 Adaptive Filtering Method



Appendix 9 Statistical Tables

Table 1: Manpower statistics by principal job (Vehicle Servicing)

表一：按職級劃分的人力統計 (汽車維修)

Job Code 職務編號	Job Title 職稱	Number of Employees as at Survey Reference Date (Excl. trainee) 在統計日期的 僱員人數 (受訓者除外)	Number of Vacancies as at Survey Reference Date (Excl. trainee) 在統計日期的空缺額 (受訓者除外)	Number of Trainees as at Survey Reference Date 在統計日期的 受訓者人數
Technologist Level 技師級				
101	Mechanical Engineer (Automotive) 汽車機械工程師	101	4	4
102	Service Manager 維修部經理	194	4	0
103	Software Product Support Engineer 軟體產品支援工程師	1	1	0
104	Field Support Engineer 外勤支援工程師	1	1	0
Sub-Total 小計		297	10	4
Technician Level 技術員級				
201	Service Instructor 維修教導員	72	1	1
202	Motor Vehicle Examiner / Tester 汽車檢查員／測試員	349	27	7
203	Service Supervisor 維修監督	900	10	3
204	Service Adviser / Receptionist 維修服務員／款待員	318	10	3
205	Engineering Technician 工程技術員	329	21	27
206	Remanufacturing Engineering Technician 再製造工程技術員	9	0	0
Sub-Total 小計		1 977	69	41
Craftsman Level 技工級				
301	Vehicle Mechanic 汽車機械工 (M, M(b))	6 064	458	450
302	Vehicle Electrician 汽車電工 (E, E(b))	641	13	22
303	Vehicle Body Repairer 車身修理工 (B1, B1(b))	854	41	39
305	Vehicle Painter 汽車噴漆工 (B2, B2(b))	606	18	22
Sub-Total 小計		8 165	530	533
Specific Services 專項服務				
304	Vehicle Body Builder 車身建造工 (S7)	175	9	1
306	Vehicle Air-conditioning Mechanic 汽車冷氣工 (S6)	30	7	0
307	Vehicle Upholsterer 車內裝飾工	142	2	0
309	Industrial Vehicle Mechanic 工業機車技工	49	3	0
310	Motocycle Mechanic 電單車機械工 (S1)	245	6	3
401	Tyre Worker / Battery Worker 輪胎工 (S2) / 電池工 (S3)	296	12	0
403	Lubrication Worker 更換機油工 (S4)	28	0	0
404	Car Accessories Worker 車輛配件工 (S5)	192	2	0
405	Car Detailing Worker 汽車美容工	767	62	0
Sub-Total 小計		1 924	103	4

Job Code 職務編號	Job Title 職稱	Number of Employees as at Survey Reference Date (Excl. trainee) 在統計日期的僱員人數 (受訓者除外)	Number of Vacancies as at Survey Reference Date (Excl. trainee) 在統計日期的空缺額 (受訓者除外)	Number of Trainees as at Survey Reference Date 在統計日期的受訓者人數
Unskilled Level 非技術工人級				
501	Customer Services Ambassador / Assistant 客戶服務大使／助理	150	11	0
502	General Worker / Cleaner 雜工／清潔工	493	17	0
Sub-Total 小計		643	28	0
Total 總數		13 006	740	582

Table 2: Manpower statistics by principal job (Auto / Parts Retail)

表二：按職級劃分的人力統計 (汽車 / 零件零售)

Job Code 職務編號	Job Title 職稱	Number of Employees as at Survey Reference Date (Excl. trainee) 在統計日期的 僱員人數 (受訓者除外)	Number of Vacancies as at Survey Reference Date (Excl. trainee) 在統計日期的 空缺額 (受訓者除外)
Managerial Level 經理級			
111	Owner / Sole Proprietor / Working Partner 東主／獨資經營者／執行合夥董事	54	0
112	General Manager 總經理	65	0
113	Sales Manager 營業經理	113	1
114	Marketing Manager 市場推廣經理	43	2
115	Customer Services Manager 客戶服務經理	38	1
116	Merchandising Manager 採購經理	8	1
117	Parts Manager 零件經理	26	1
Sub-Total 小計		347	6
Supervisory Level 主任級			
211	Store / Branch Supervisor 店舖／分店營業主任	137	3
212	Customer Services Supervisor 客戶服務主任	74	1
213	Merchandiser / Buyer 採購主任	38	1
214	Parts / Logistics / Distribution / Warehouse Supervisor 配件／物流／運輸／倉庫主任	119	4
215	Marketing Officer 市場推廣主任	58	3
Sub-Total 小計		426	12
Operative / Clerical Support Level 技術人員／文員級			
511	Senior Sales Representative / Staff 高級營業員／售貨員	1 374	40
512	Junior Sales Representative / Staff 初級營業員／售貨員	439	26
513	Stock Assistant 存貨助理	133	3
514	Sales / Service Staff (Part Time) 售貨員／服務員 (兼職)	35	0
515	Other Clerks / Supporting Staff 其他文員／輔助人員	933	16
Sub-Total 小計		2 914	85
Total 總數		3 687	103

Table 3: Percentage distribution of average monthly income of employees by principal job (Vehicle Servicing)

表三：按每月平均收入幅度劃分的全職僱員分佈 (汽車維修)

Job Code 職務編號	Job Title 職稱	\$12,000 or below 或以下	\$12,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$25,000	\$25,001 - \$35,000	\$35,001 - \$45,000	\$45,000 or above 或以上	Total number of full-time employees 全職僱員 人數
Technologist Level 技師級									
101	Mechanical Engineer (Automotive) 汽車機械工程師	0.0%	0.0%	0.0%	1.0%	22.0%	43.0%	34.0%	101
102	Service Manager 維修部經理	0.0%	0.0%	0.0%	1.6%	15.3%	36.3%	46.8%	194
103	Software Product Support Engineer 軟體產品支援工程師	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	1
104	Field Support Engineer 外勤支援工程師	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	1
Sub-Total 小計		0.0%	0.0%	0.0%	1.4%	18.2%	38.4%	42.1%	297
Technician Level 技術員級									
201	Service Instructor 維修教導員	0.0%	0.0%	0.0%	8.3%	90.3%	1.4%	0.0%	72
202	Motor Vehicle Examiner / Tester 汽車檢查員／測試員	0.0%	0.0%	6.9%	12.0%	50.4%	28.1%	2.6%	349
203	Service Supervisor 維修監督	0.0%	0.0%	0.2%	51.9%	38.0%	9.8%	0.0%	900
204	Service Adviser / Receptionist 維修服務員／款待員	0.0%	24.4%	26.7%	7.6%	41.3%	0.0%	0.0%	318
205	Engineering Technician 工程技術員	0.0%	24.8%	18.0%	18.0%	39.3%	0.0%	0.0%	329
206	Remanufacturing Engineering Technician 再製造工程技術員	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	9
Sub-Total 小計		0.0%	8.0%	8.6%	30.2%	43.2%	9.5%	0.5%	1 977
Craftsman Level 技工級									
301	Vehicle Mechanic 汽車機械工 (M, M(b))	0.3%	2.5%	38.0%	58.2%	0.9%	0.0%	0.0%	6 064
302	Vehicle Electrician 汽車電工 (E, E(b))	0.0%	2.7%	12.8%	84.5%	0.0%	0.0%	0.0%	641
303	Vehicle Body Repairer 車身修理工 (B1, B1(b))	0.0%	2.1%	39.4%	58.4%	0.0%	0.0%	0.0%	854
305	Vehicle Painter 汽車噴漆工 (B2, B2(b))	22.5%	3.3%	29.3%	44.0%	0.8%	0.0%	0.0%	606
Sub-Total 小計		1.9%	2.5%	35.5%	59.3%	0.8%	0.0%	0.0%	8 165
Specific Services 專項服務									
304	Vehicle Body Builder 車身建造工 (S7)	0.0%	0.0%	24.6%	74.9%	0.6%	0.0%	0.0%	175
306	Vehicle Air-conditioning Mechanic 汽車冷氣工 (S6)	0.0%	0.0%	92.9%	3.6%	0.0%	3.6%	0.0%	30
307	Vehicle Upholsterer 車內裝飾工	0.0%	0.0%	92.3%	7.7%	0.0%	0.0%	0.0%	142
309	Industrial Vehicle Mechanic 工業機車技工	0.0%	0.0%	0.0%	94.4%	5.6%	0.0%	0.0%	49
310	Motorcycle Mechanic 電單車機械工 (S1)	0.0%	12.2%	27.8%	60.0%	0.0%	0.0%	0.0%	245
401	Tyre Worker / Battery Worker 輪胎工 (S2) / 電池工 (S3)	0.0%	10.7%	15.1%	60.5%	13.7%	0.0%	0.0%	296
403	Lubrication Worker 更換機油工 (S4)	0.0%	3.6%	78.6%	17.9%	0.0%	0.0%	0.0%	28
404	Car Accessories Worker 車輛配件工 (S5)	1.6%	1.6%	92.2%	4.7%	0.0%	0.0%	0.0%	192
405	Car Detailing Worker 汽車美容工	10.2%	15.8%	58.8%	15.2%	0.0%	0.0%	0.0%	767
Sub-Total 小計		4.3%	9.8%	50.5%	33.1%	2.3%	0.1%	0.0%	1 924

Job Code 職務編號	Job Title 職稱	\$12,000 or below 或以下	\$12,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$25,000	\$25,001 - \$35,000	\$35,001 - \$45,000	\$45,000 or above 或以上	Total number of full-time employees 全職僱員 人數
Unskilled Level 非技術工人級									
501	Customer Services Ambassador/ Assistant 客戶服務大使／助理	8.7%	18.1%	57.2%	14.5%	1.4%	0.0%	0.0%	150
502	General Worker / Cleaner 雜工／清潔工	6.1%	69.9%	24.0%	0.0%	0.0%	0.0%	0.0%	493
Sub-Total 小計		6.7%	58.5%	31.3%	3.2%	0.3%	0.0%	0.0%	643
Total 總數		2.2%	7.1%	32.7%	46.9%	7.8%	2.3%	1.0%	13 006

Table 4: Percentage distribution of average monthly income of employees by principal job (Auto / Parts Retails)

表四：按每月平均收入幅度劃分的全職僱員分佈 (汽車 / 零件零售)

Job Code 職務編號	Job Title 職稱	\$12,000 or below 或以下	\$12,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$25,000	\$25,001 - \$35,000	\$35,001 - \$45,000	\$45,000 or above 或以上	Total number of full-time employees 全職僱員 人數
Managerial Level 經理級									
111	Owner / Sole Proprietor / Working Partner 東主／獨資經營者／執行合夥董事	0.0%	0.0%	0.0%	4.2%	70.8%	10.4%	14.6%	54
112	General Manager 總經理	0.0%	0.0%	0.0%	0.0%	8.2%	13.1%	78.7%	65
113	Sales Manager 營業經理	0.0%	0.0%	0.0%	5.7%	19.0%	43.8%	31.4%	113
114	Marketing Manager 市場推廣經理	0.0%	0.0%	0.0%	0.0%	14.6%	70.7%	14.6%	43
115	Customer Services Manager 客戶服務經理	0.0%	0.0%	0.0%	0.0%	2.6%	94.7%	2.6%	38
116	Merchandising Manager 採購經理	0.0%	0.0%	0.0%	0.0%	50.0%	50.0%	0.0%	8
117	Parts Manager 零件經理	0.0%	0.0%	0.0%	4.0%	8.0%	68.0%	20.0%	26
Sub-Total 小計		0.0%	0.0%	0.0%	2.8%	21.9%	44.4%	30.9%	347
Supervisory Level 主任級									
211	Store / Branch Supervisor 店舖／分店營業主任	0.0%	0.0%	1.5%	45.6%	39.7%	13.2%	0.0%	137
212	Customer Services Supervisor 客戶服務主任	0.0%	0.0%	2.7%	14.9%	52.7%	29.7%	0.0%	74
213	Merchandiser / Buyer 採購主任	0.0%	0.0%	2.7%	67.6%	29.7%	0.0%	0.0%	38
214	Parts / Logistics / Distribution / Warehouse Supervisor 配件／物流／運輸／倉庫主任	0.0%	1.7%	5.9%	84.9%	7.6%	0.0%	0.0%	119
215	Marketing Officer 市場推廣主任	0.0%	0.0%	12.7%	49.1%	38.2%	0.0%	0.0%	58
Sub-Total 小計		0.0%	0.5%	4.5%	53.7%	31.8%	9.5%	0.0%	426
Operative / Clerical Support Level 技術人員／文員級									
511	Senior Sales Representative / Staff 高級營業員／售貨員	0.1%	6.7%	26.1%	57.1%	9.2%	0.6%	0.3%	1 374
512	Junior Sales Representative / Staff 初級營業員／售貨員	0.0%	30.8%	9.1%	40.0%	4.6%	0.0%	15.5%	439
513	Stock Assistant 存貨助理	0.0%	48.1%	36.6%	15.3%	0.0%	0.0%	0.0%	133
514	Sales / Service Staff (Part Time) 售貨員／服務員 (兼職)	21.2%	3.0%	18.2%	57.6%	0.0%	0.0%	0.0%	35
515	Other Clerks / Supporting Staff 其他文員／輔助人員	0.5%	18.6%	60.7%	5.8%	14.5%	0.0%	0.0%	933
Sub-Total 小計		0.4%	16.3%	34.7%	36.1%	9.6%	0.3%	2.6%	2 914
Total 總數		0.3%	12.8%	27.8%	35.1%	13.4%	5.5%	4.9%	3 687

Table 5: Preferred Years of Experience of Employees by sector by job level

表五：按界別劃分的僱員宜有的年資

Vehicle Servicing 汽車維修

Job Level 職級	Less than 1 year 一年以下	1 year to less than 3 years 一年至三年以下	3 years to less than 6 years 三年至六年以下	6 years to less than 10 years 六年至十年以下	10 years or above 十年或以上	Total number of full- time employees 全職僱員人數
Technologist Level 技師級	6.0%	0.0%	0.0%	68.5%	25.6%	297
Technician Level 技術員級	2.7%	0.4%	60.6%	34.2%	2.2%	1 977
Craftsman Level 技工級	5.3%	48.0%	40.3%	6.2%	0.2%	8 165
Specific Services 專項服務	25.8%	34.8%	32.8%	6.4%	0.2%	1 924

Auto / Parts Retailers 汽車 / 零件零售

Job Level 職級	Less than 1 year 一年以下	1 year to less than 3 years 一年至三年以下	3 years to less than 6 years 三年至六年以下	6 years to less than 10 years 六年至十年以下	10 years or above 十年或以上	Total number of full- time employees 全職僱員人數
Managerial Level 經理級	0.0%	1.7%	0.0%	57.1%	41.1%	347
Supervisory Level 主任級	0.0%	1.9%	75.1%	22.1%	0.9%	426
Operative / Clerical Support Level 技術人員 / 文員級	8.6%	52.3%	33.4%	5.3%	0.3%	2 914

Table 6: Preferred Level of Education of Employees by sector by job level
 表六：按界別劃分的僱員宜有的教育程度

Vehicle Servicing 汽車維修

Job Level 職級	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	Total number of full- time employees 全職僱員人數
Technologist Level 技師級	0.7%	75.7%	19.6%	2.4%	1.7%	0.0%	297
Technician Level 技術員級	0.0%	4.8%	43.8%	42.9%	8.5%	0.0%	1 977
Craftsman Level 技工級	0.0%	0.0%	0.0%	25.4%	54.7%	19.9%	8 165
Specific Services 專項服務	0.0%	0.0%	0.0%	19.8%	56.5%	23.7%	1 924

Auto / Parts Retailers 汽車 / 零件零售

Job Level 職級	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	Total number of full- time employees 全職僱員人數
Managerial Level 經理級	0.0%	82.2%	16.0%	1.5%	0.3%	0.0%	347
Supervisory Level 主任級	0.0%	25.1%	57.7%	13.1%	4.0%	0.0%	426
Operative / Clerical Support Level 技術人員/文員級	0.0%	1.8%	11.8%	34.6%	51.1%	0.7%	2 914