



Retail Trade Training Board
零售業訓練委員會

2008

MANPOWER SURVEY REPORT • RETAIL TRADE

人力調查報告書 • 零售業

MANPOWER SURVEY REPORT 2008 RETAIL TRADE



零售業2008年度人力調查報告書

OPPORTUNITIES • ACTION • SUCCESS
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2008 Manpower Survey Report

Retail Trade

零售業

2008年人力調查報告

Retail Trade Training Board

Vocational Training Council

職業訓練局

零售業訓練委員會

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SECTION I

EXECUTIVE SUMMARY

The Survey

1.1 The Retail Trade Training Board conducts a manpower survey biennially with a view to assessing the manpower situation and identifying the manpower requirements and training needs of the retail trade.

1.2 The 2008 Retail Trade Manpower Survey fieldwork was conducted in October 2008 using 13th October 2008 as the time reference of data. Out of a total of 36 155* registered companies in the retail trade, 674 companies had been selected by the stratified random sampling method to receive the questionnaires.

1.3 A new job title “Order Assistant (Online Services)” was added in the survey. Details of the job are shown in the following table.

OPERATIVE/CLERICAL SUPPORT LEVEL		
Code No.	Job Title	Job Description
315	Order Assistant (Online Services)	Receives online orders, checks stocks, arranges distribution of commodities, and confirms the delivery of commodities to destinations.

1.4 To enhance the response rate, companies employing four persons or less were only requested to complete Part I (basic information) of the questionnaire without any training related questions asked. The 2006 data relating to training needs had been adjusted to facilitate direct comparison with the 2008 data. Attention should be paid to this change when interpreting and comparing such data.

1.5 The overall effective response rate for the current survey was 95.1% which is slightly higher than the 93.5% achieved in 2006.

Objective

1.6 The Survey aims at looking at the retail trade from a macro stance to identify short to medium term trends of the manpower demand and training needs in the trade. The resulting trends therefore point to the general direction the trade is heading for and the implications of the survey findings to individual branch or entity might vary.

Note:

* The figure of 36 155 refers to the number of registered companies at company level based on the record of Central Register of Establishments (CRE) excluding those inactive companies in the trade. The total number of companies at company level in 2008 was 42 695.

Limitations

1.7 From the time the Survey was conducted to its publication, the financial tsunami has done a substantial damage to the Hong Kong economy, in particular the retail trade, rendering deviations of the findings from actual scenarios.

1.8 Due to limited resources, sample companies were drawn by statistical method from the trade for this Survey. Hence, inherent statistical errors were inevitable and might affect the translation to survey findings.

Business Outlook

1.9 The global financial crisis had been lingering since August 2008, and deepened in the final quarter. According to the economic and social data from Census and Statistics Department, the year-on-year Gross Domestic Product (GDP) was 3.9% in 2008, down from 5.6% compared to 2007, and down from 14.5% in the final quarter of 2008 compared to same quarter of 2007. A significant drop was noted since the second half of the year 2008.

1.10 The inflationary pressure had been receding notably since the latter part of 2008, and is expected to decline further in 2009. The underlying Composite Consumer Price Index (CPI) is forecast to increase by 1.5% in 2009 as a whole which is down from the 5.6% increase in 2008.

1.11 The non-seasonally adjusted unemployment continues to rise, increasing from 3.1% in first quarter of 2008 to 3.4% of the second quarter of 2008. It further rose to 3.8% in the final quarter of 2008 and is expected to surge in the first half of 2009 to its highest level 7.3% since the 2003. As a result, both sales value and volume were forecast to fall in 2009 due to the heightened uncertainties, falling household wealth and rising unemployment.

1.12 Owing to the plunge in the economic indicators, the economic situation of 2009 is exceptionally uncertain. Business conditions for retailers are likely to be unstable. Rising unemployment and falling income would continue to undermine consumer sentiment. In this regard, the retail sales volume is expected to decline 8.0% for the whole of year 2009.

1.13 Uncertainty over the human swine flu outbreak has cast a shadow over the struggling global economy. Though the human swine flu may not be as severe as the SARS in 2003, it will inevitably discourage travelling and in turn undermine tourism and retail businesses.

1.14 However, with the further integration of the Mainland and Hong Kong, the efforts to expand Closer Economic Partnership Arrangement (CEPA), the supportive measures from the Central Government, and the initiatives to enhance greater cooperation with Guangdong and Shenzhen, it is expected such measures would generate some economy rebound in the final quarter of 2009 and benefit to the retail sector.

1.15 The total tourism expenditures associated with inbound tourism raise from HK\$140 517 million in 2007 to HK\$148 600 million in 2008 and accounted for approximately 55% of total visitor arrivals in 2008, up 4.7% over 2007 to more than 16.6 million, resulting from the higher visitors from China to Hong Kong via the Individual Visit Scheme (IVS).

1.16 The rising number of the inbound visitors would definitely boost the retail sales in Hong Kong. Hence, the Central Government announced two measures to facilitate Mainland residents to visit Hong Kong which included non-Guangdong resident living in Shenzhen applying for IVS endorsement in Shenzhen to visit Hong Kong; and eligible Shenzhen permanent residents applying for an one year multiple entry IVS endorsement to Hong Kong within one year.

1.17 In addition, the HKSAR introduced two measures in 2009 to lift the restriction of Taiwan visitors staying in Hong Kong, that is, two “iPermits” can be applied within 30 days to extend the period of stay, and multiple entry permit holders were allowed to stay in Hong Kong up to 30 days. These measures are expected to further increase the contribution of Taiwan visitors to the retail sector.

1.18 Whereas the Central Government was determined to maintain an 8% growth target, any shortfall in consumption growth might therefore be made up by increasing government spending and measures. The Mainland thus holds the best promise along all important markets for consumer goods even with slower economic growth. It is expected that private consumption in China is likely to remain strong. As a result, some wealthy mainland consumers may incline to purchase mid-end to high-end products both in China and Hong Kong.

1.19 With the announcement of 14 measures in seven fields to support Hong Kong's economy and efforts of the SAR Government and Hong Kong people from all walks of life, Hong Kong will definitely get through the crisis and rewrite a new and magnificent chapter.

1.20 The above-mentioned outlook forecast may vary from the actual situation in 2009 due to the numerous uncertainties linked to the global economic environment. In general, the Manpower Survey Working Group members and participants of the In-depth Interviews believed the business situation of retail sector in year 2009 would be modest.

Manpower Situation in 2008

1.21 At the time of survey, the total number of employees engaged in the retail trade was 231 229 (vs 218 915 in 2006), representing an increase of 5.6% over the previous survey. Of the total, technical manpower consisted of 205 806 (89%) (vs 192 425 in 2006) whilst non-technical manpower consisted of 25 423 (11%) (vs 26 490 in 2006).

1.22 Technical manpower refers to employees engaged in principal jobs of the retail trade as listed in **Appendix 5** for which analysis is carried out in this report to show the pertinent needs of this trade. Non-technical manpower, on the other hand, refers to employees engaged in the more generic jobs such as finance/accounting, human resources, IT, administrative and other supportive functions.

1.23 Among the total manpower of 231 229 engaged in 2008, 8 730 (3.8%) were managerial staff, 33 317 (14.4%) were supervisory staff, 145 264 (62.8%) were clerical/operative staff (including part-time sales staff), 18 495 (8%) were owner/sole proprietor/working partner and 25 423 (11%) were non-technical manpower. Comparison on the composition between the 2006 and 2008 surveys is shown in the following table.

Job Level	2006	2008
Owner/ Sole Proprietor/ Partner	13.5%	8%
Managerial staff	3.2%	3.8%
Supervisory staff	9.1%	14.4%
Clerical/ Operative staff	62.1%	62.8%
Non-technical manpower	12.1%	11%
Total	100.0%	100.0%

1.24 The total number of vacancies at the date of survey was 5 142 comprising 178 for the managerial level, 241 for the supervisory level, 4 594 for the clerical/operative level and 129 for non-technical staff. As a result, the total manpower demand, which has taken into account the vacancies, would have been 236 371 at the time reference of data.

Manpower Forecast for 2009 by Employers

1.25 Employers had forecast the manpower demand to be 237 874 in the next 12 months from the survey reference date, representing an overall increase of 1 503 (0.6%) over 2008.

1.26 The branches with the highest forecast increase in manpower demand are as follows:

- a. Telecommunications equipment & Electrical Products (+2.5%)
- b. Consumer Goods (+1.5%)
- c. Department Stores (+1.3%)

1.27 On the other hand, a drop in manpower demand is envisaged in the following branches:

- a. Durable Goods (-0.1%)
- b. Supermarkets (-0.1%)
- c. Fuel and transport equipment (-0.1%)

1.28 By job level, the forecast manpower increased by 31 (0.3%) for managerial staff; 186 (0.6%) for supervisory staff and 1 545 (1%) for clerical/operative staff.

Manpower Forecast for 2009 - 2011 Using the Labour Market Analysis Approach

1.29 As in the 2006 survey, the Labour Market Analysis (“LMA”) approach has been applied in projecting manpower for the retail trade in the next three years. In the process, seven principal components were selected from a pool of some 42 economic indicators which were then tested statistically to arrive at the projected figures. A description of the LMA approach and the key assumptions used are shown in paragraphs 2.24 – 2.25 of Section II. The projected manpower requirements for 2009 to 2011 are:

Year	Actual Manpower	Employers’ Forecast	Manpower Projection by LMA Approach
2008	236 371	-	-
2009	-	237 874 (+0.6%*)	215 560 (-8.8%*)
2010	-	-	220 526 (+2.3%**)
2011	-	-	221 867 (+0.6%**)

1.30 The manpower forecast of 2009 derived from the LMA Approach at -8.8% shows a big difference, in terms of both magnitude and direction, from the Employers’ Forecast at +0.6%. Such deviation might be caused by the survey being conducted in Oct 2008 while the LMA Approach has taken into account the most updated economic indicators that reflected the financial tsunami of the first quarter of 2009.

Training Needs[#]

1.31 In anticipation of the financial crisis, most employers find it pressing to upgrade their employees to cope with the mounting retail business as well as to stay competitive amongst others.

1.32 The number of forecast training places to be provided or sponsored by employers in 2009 was 119 950. As compared at 2008, 124 901 training places were provided or sponsored by employers, there was a slightly drop of about 4%. With a view of the uncertain economy in the year of 2009, the drop was infinitesimal and indicated that employers continued paying attention to staff training and development.

1.33 The ratio of the forecast training places to be provided internally and externally for 2009 by areas are:

Subject Areas	Training Places to be provided Internally	Training Places to be Provided Externally
Managerial Training	69%	31%
Trade Specific Training	82%	18%
Languages	47%	53%
Others	83%	17%

Note:

* As percentage change vs actual manpower in 2008.

** As percentage change vs projected manpower in previous year.

All figures related to the training needs excluded companies with employment size of 4 persons or less.

1.34 The top three areas that needed training most as reflected in the 2008 survey were:

- a. Customer Service
- b. Selling Skills
- c. Handling Complaints

1.35 The top three areas that growth of training needed most as reflected in the 2008 survey were:

- a. IT & Applications
- b. English Languages
- c. Logistics / Supply Chain Management

1.36 With a view to improving overall employee standard, about 50.8% of the respondents rated pre-employment training for frontline sales staff either a 'Pre-requisite' or 'Preferred' criteria, up from 47.5% in 2006. In consideration of the 'Pre-requisite' alone, the percentage of respondents apparently rose from 4.8% in 2006 to 12.1% in this round, and "Preferred" percentage of respondents increased from 42.7% in 2006 to 38.7% in 2008, indicating that, in general, employers were highly in favour of recruiting employees with pre-employment training.

Sources:

1. Hang Seng Economic Monthly
2. China Economic Monitor
3. The Hong Kong Monetary Authority
4. Census and Statistics Department
5. Hong Kong Tourism Board
6. Hong Kong Trade Development Council
7. 2008 Economic Background & 2009 Prospects

SECTION II

SUMMARY OF SURVEY FINDINGS

A. MANPOWER SITUATION IN 2008

Total Manpower

2.1 Based on the survey findings, the retail industry employed 231 229 persons in October 2008, the time reference of data for this survey. Out of this number, 205 806 (89%) were technical manpower and 25 423 (11%) were non-technical manpower, more or less in line with the situation in 2006 of which the percentages were 88% and 12% respectively.

2.2 A list of the principal jobs with brief descriptions broken down by job level used in this survey is shown in **Appendix 5**. In order to gain a holistic view of the total workforce engaged in the retail trade, both technical and non-technical manpower were under scrutiny for analysis in this survey and 'manpower demand' refers to the aggregate of these two categories, which also covers both the number employed and vacancies, throughout the report. Detailed statistics are shown in Tables 1 to 5 in Section V.

Distribution of Companies

2.3 The retail trade is classified into ten branches and the distribution of companies by employment size at company level is shown below:

	Branch	Employment Size of four or less persons	Employment Size of five or above persons	Total
1.	Foodstuffs, Alcoholic Drinks and Tobacco	7 798	1 532	9 330
2.	Supermarkets	50	67	117
3.	Fuel and Transport Equipment	701	246	947
4.	Clothing, Footwear and Allied Products	7 110	1 144	8 254
5.	Consumer Goods	10 024	1 344	11 368
6.	Department Stores	0	28	28
7.	Jewellery	1 044	304	1 348
8.	Medicines and Cosmetics	757	500	1 257
9.	Durable Goods	1 255	516	1 771
10.	Telecommunications Equipment and Electrical Products	1 441	294	1 735
	Total	30 180 (83.5%)	5 975 (16.5%)	36 155* (100%)

Note:

* The figure of 36 155 refers to the number of registered companies at company level based on the record of Central Register of Establishments (CRE) excluding those inactive companies in the trade. The total number of companies at company level in 2008 was 42 695.

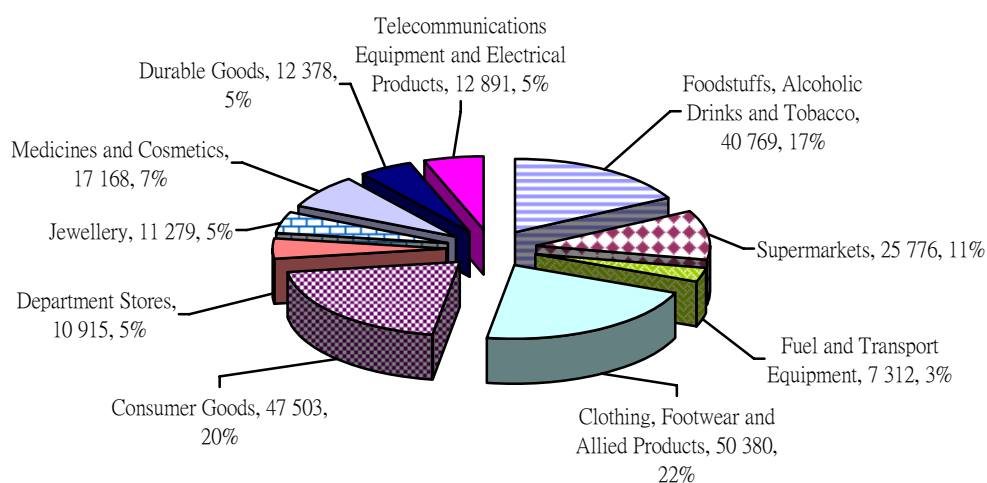
Distribution of Manpower

2.4 For ease of review and comparison, the retail trade is classified into ten branches and the distribution of manpower by branch is shown below:

Branch	Number Employed	Number of Vacancies	Manpower Demand
1. Foodstuffs, Alcoholic Drinks and Tobacco	40 287	482	40 769
2. Supermarkets	24 851	925	25 776
3. Fuel and Transport Equipment	7 283	29	7 312
4. Clothing, Footwear and Allied Products	49 146	1 234	50 380
5. Consumer Goods	46 467	1 036	47 503
6. Department Stores	10 659	256	10 915
7. Jewellery	11 086	193	11 279
8. Medicines and Cosmetics	16 813	355	17 168
9. Durable Goods	11 815	563	12 378
10. Telecommunications Equipment and Electrical Products	12 822	69	12 891
Total	231 229	5 142	236 371

Figure 1: Manpower Demand by Branch

(Total Manpower Demand: 236 371)



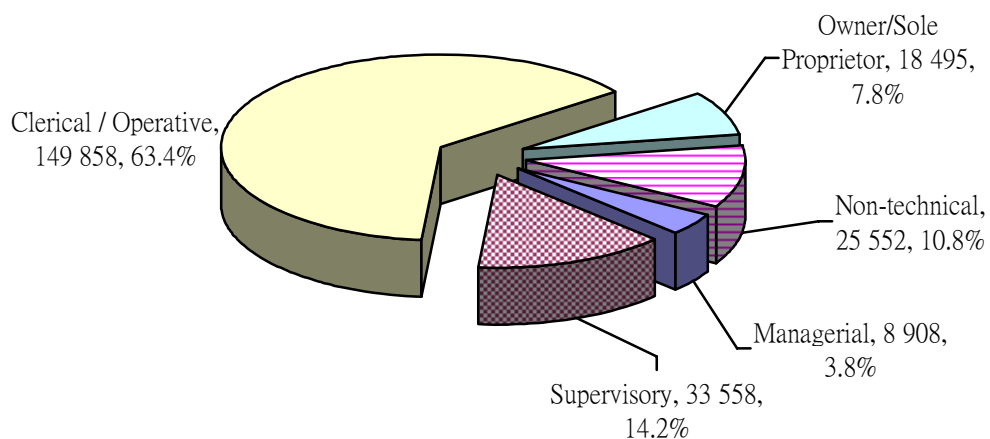
2.5 The total manpower demand of 236 371 was made up of 8 908 (3.8%) managerial staff, 33 558 (14.2%) supervisory staff, 149 858 (63.4%) clerical/operative staff, 18 495 (7.8%) owner/sole proprietor and 25 552 (10.8%) non-technical manpower. The distribution of total manpower demand by job level is shown below.

Manpower Distribution by Job Level

Job Level	Number Employed	Number of Vacancies	Manpower Demand
Managerial	8 730	178	8 908
Supervisory	33 317	241	33 558
Clerical / Operative	145 264	4 594	149 858
Owner / Sole Proprietor	18 495	-	18 495
Technical Manpower	205 806	5 013	210 819
Non-technical Manpower	25 423	129	25 552
Total	231 229	5 142	236 371

Figure 2: Manpower Demand by Job Level

(Total Manpower Demand: 236 371)



2.6 The three principal jobs with the largest number of employees under each of the managerial, the supervisory and the clerical / operative levels are shown below.

Job Level	Number of Employees	% at the Respective Job Level
Managerial		
1. Store Manager	3 952	44.4%
2. Operations / Retail Manager	1 569	17.6%
3. District / Area Manager	703	7.9%
Supervisory		
1. Store Supervisor	28 518	85.0%
2. Merchandiser / Buyer	2 687	8.0%
3. Logistics / Distribution / Warehouse Supervisor	700	2.1%
Clerical / Operative		
1. Junior Sales Staff	69 151	46.1%
2. Senior Sales Staff	42 239	28.2%
3. Part-Time Sales Staff	28 848	19.3%

Comparison of Manpower Demand in 2006 & 2008

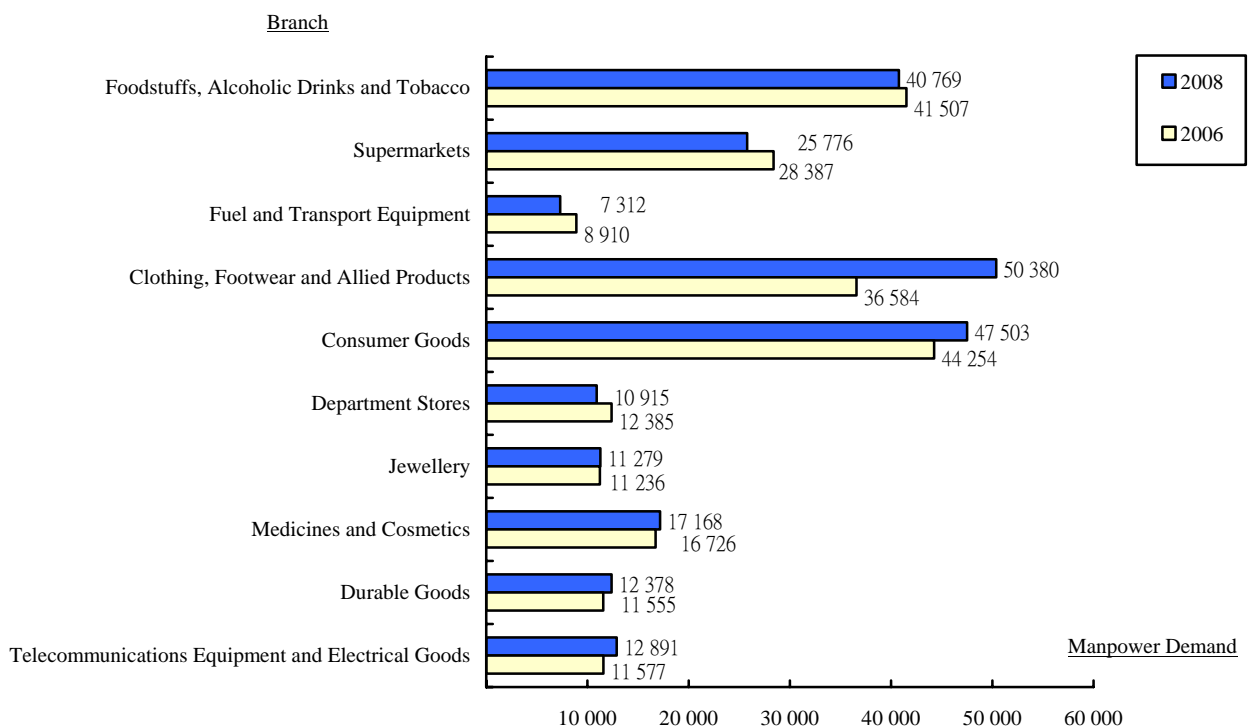
2.7 The 2008 survey was conducted in October, a period similar to the 2006 survey. Thus, the two sets of data are comparable without the need for seasonal adjustment. When interpreting the data, however, care must be taken that the overall economy in 2006, including the retail trade, was steadfastly booming while the global financial tsunami significantly restrain the growth of Hong Kong economy in the final quarter of 2008. The fluctuation in the economic situation would have a consequential impact on the manpower situation of the retail trade, as it is one of the industries that is most responsive to the economic trends.

2.8 In the 2008 survey, companies with employment size of four persons or less (83.5%) only needed to complete Part I (basic information) of the questionnaire for collecting core information without identifying their training needs. Thus, some 2006 figures related to training issues had been adjusted to facilitate direct comparison with that of 2008. Attention should be paid to this change when interpreting and comparing the data.

2.9 As compared with 2006, the 2008 total manpower demand, comprising both technical and non-technical manpower, increased to 236 371 (5.9% or 13 250 employees). A comparison of the manpower demand by branch between the two periods is shown in Table 3 in Section V.

2.10 Among 10 branches, Fuel and Transport Equipment (-17.9%), Department Stores (-11.9%), Supermarkets (-9.2%) and Foodstuffs, Alcoholic Drinks and Tobacco (-1.8%) recorded a drop in manpower in 2008 (7% or 6 417 employees), the remaining 6 branches revealed an increase, the highest being ‘Clothing, Footwear and Allied Products’ (37.7%), followed by ‘Telecommunications Equipment and Electrical Products’ (11.4%) and ‘Consumer Goods’ (7.3%).

Figure 3: Comparison of Manpower Demand by Branch, 2006 & 2008



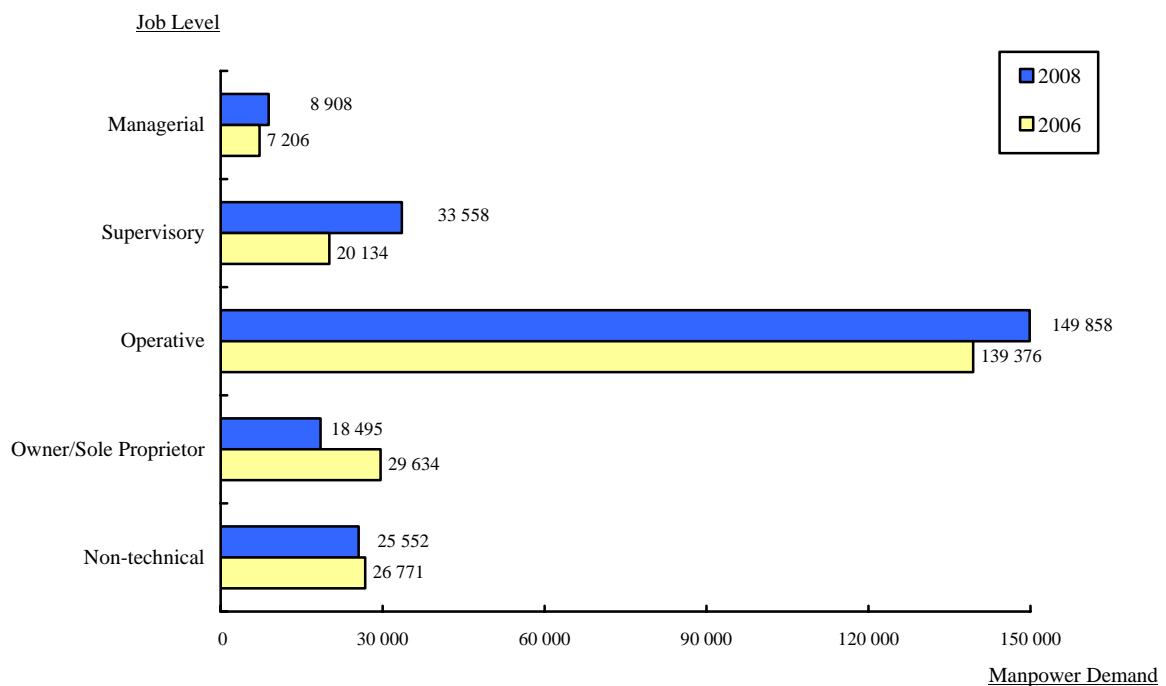
2.11 Owing to more cities in the Mainland were opened to the Individual Visitor Scheme, the higher demand for the mainland tourist favorite products, such as clothing, footwear and allied products, telecommunications / electrical products and consumer goods brought about increase in derived demand for practitioners in the related branches.

2.12 Of the 10 branches, ‘Fuel and Transport Equipment’ reported a significant decrease of -17.9% or 1 598 in manpower as compared with the 2006 survey, as the deteriorating external environment and the surging fuel prices could lead to the decrease in demand for transport equipment which in turn adversely affected the manpower demand in this branch.

2.13 Overall, the 2008 total manpower demand was up 5.9% or 13 250 employees as compared with the 2006 figures. If analyzed by job level, the managerial, the supervisory and the clerical / operative levels all recorded manpower growth over 2006. Among them, the supervisory level registered the highest growth of 66.7% or 13 424 employees (vs 17.9% or 3 052 employees in 2006), followed by the managerial level, which was 23.6% or 1 702 employees (vs 10.7% or 669 employees in 2006). The clerical/operative level also demonstrated an increase, 7.5% or 10 482 employees (vs 7.6% or 9 823 employees in 2006). The figures indicated that more employers tried to hire the supervisory level staff to handle the daily operations of retail outlets instead of managerial level staff to save the cost and they expected this level of employees would gradually take up duties that performed by managers. This phenomenon was also found in other trades.

2.14 The category of Owner/Sole Proprietor, being the only job level exhibiting a fall in manpower, experienced a sharp decrease of 37.6% or 11 139 persons as compared with 2006. This was an indication that, with the high rental rate and wages in the year of 2008, people preferred return to the working population for a better job security than ran their own business.

Figure 4: Comparison of Manpower Demand by Job Level, 2006 & 2008



B. FORECAST MANPOWER DEMAND

Employers' Forecast for 2009

2.15 The global financial crisis and the uncertain economic outlook have a recessionary effect on Hong Kong economy. Taking the major economic indicators, including the Real GDP, Composite CPI, Private Consumption and Unemployment Rate, into consideration, the economic performance of 2009 would probably uncertain and difficult. The two main drivers affecting the retail trade, namely internal spending by Hong Kong people and tourism expenditure associated to inbound tourism, displayed a downward momentum in the final quarter of 2008.

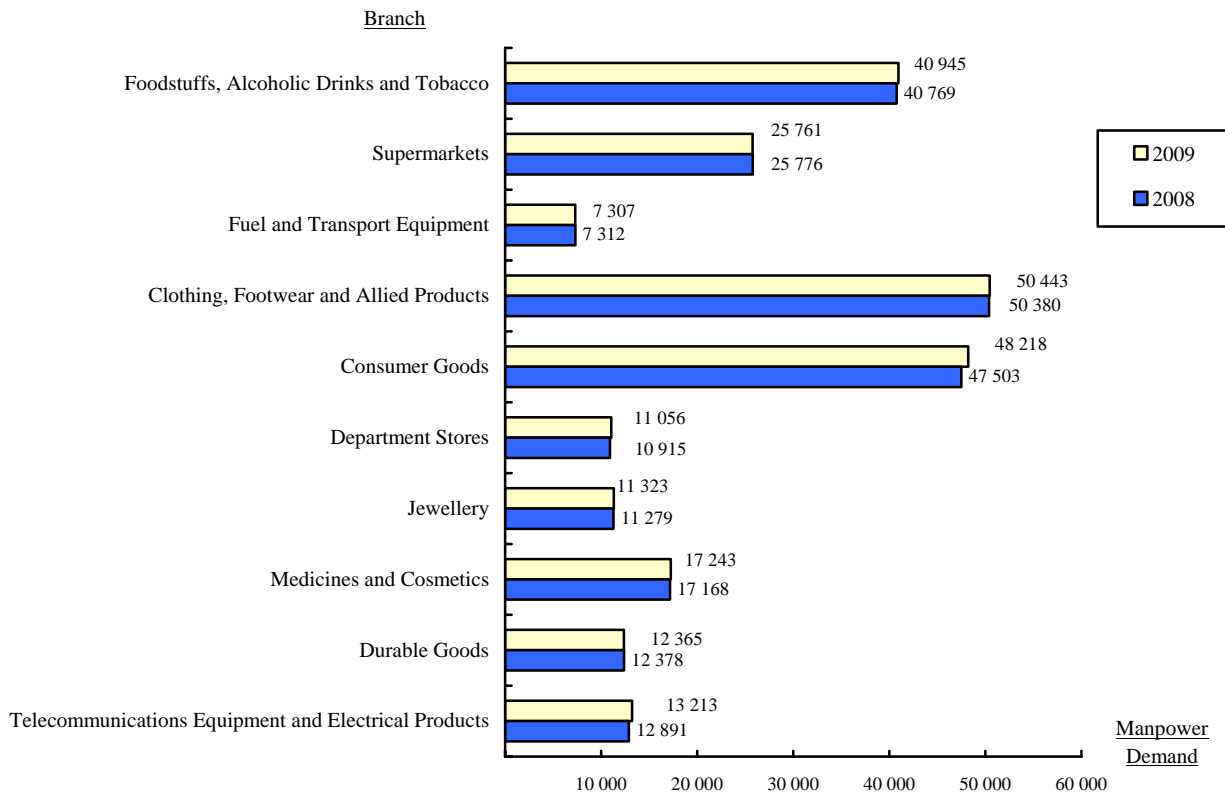
2.16 The number of inbound tourist demonstrated a reduction in the third quarter of 2008. Visitor arrivals from the United States and some European countries have plunged due to the global economic downturn. Fortunately, mainland visitor arrivals still recorded a moderate growth. China being relatively less affected by the crisis will continue to play an important role in supporting the performance of retail trade.

2.17 In anticipation of a steady growth of mainland visitors, employers predicted a further growth of manpower demand to 237 874 in the next 12 months, representing an increase of 0.6% in terms of percentage and 1 503 in terms of number.

Employers' Forecast Manpower Demand for 2009

Branch	2008 Manpower Demand	2009 Forecast Demand	Changes	
1. Foodstuffs, Alcoholic Drinks and Tobacco	40 769	40 945	+176	(+0.4%)
2. Supermarkets	25 776	25 761	-15	(-0.1%)
3. Fuel and Transport Equipment	7 312	7 307	-5	(-0.1%)
4. Clothing, Footwear and Allied Products	50 380	50 443	+63	(+0.1%)
5. Consumer Goods	47 503	48 218	+715	(+1.5%)
6. Department Stores	10 915	11 056	+141	(+1.3%)
7. Jewellery	11 279	11 323	+44	(+0.4%)
8. Medicines and Cosmetics	17 168	17 243	+75	(+0.4%)
9. Durable Goods	12 378	12 365	-13	(-0.1%)
10. Telecommunications Equipment and Electrical Products	12 891	13 213	+322	(+2.5%)
Total	236 371	237 874	+1 503	(+0.6%)

Figure 5: Employers' Forecast Manpower Demand by Branch, 2008 & 2009



2.18 Despite an overall forecast manpower growth of 0.6% in 2009, Figure 5 above reveals that 3 of the 10 branches, namely, 'Supermarkets' (-0.1%), 'Fuel and Transport Equipment' (-0.1%) and 'Durable Goods' (-0.1%) expected decreases in manpower demand in 2009. Among the branches with upside forecasts, employers of the 'Telecommunications Equipment and Electrical Products' sector were the most optimistic, but still the percentage was only +2.5%.

2.19 Employers' forecast manpower demand by job level is summarized below.

Job Level	2008 Manpower Demand	2009 Employers' Forecast Demand	Changes
Managerial	8 908	8 939	+31 (+0.3%)
Supervisory	33 558	33 744	+186 (+0.6%)
Clerical/Operative	149 858	151 403	+1 545 (+1.0%)
Owner/Sole Proprietor	18 495	-	- -
Technical Manpower	210 819	212 581	+1 762 (+0.75%)
Non-technical Manpower	25 552	25 293	-259 (-1.0%)

2.20 The top 5 principal jobs with the highest forecast increase in manpower demand are summarized below.

Principal Job	2008 Manpower Demand	2009 Employers' Forecast Demand	Changes
Junior Sales Staff	69 151	70 282	+1 131 (+1.6%)
Part-Time Sales/ Service Staff	28 848	29 114	+266 (+0.9%)
Store Supervisor	28 518	28 648	+130 (+0.5%)
Senior Sales Staff	42 239	42 356	+117 (+0.3%)
Store Manager	3 952	4 019	+67 (+1.7%)

2.21 Similar to the 2004 and 2006 surveys, frontline staff, especially 'Junior Sales Staff', still occupied a significant position in terms of headcount in forecast manpower demand, as the retail chains usually hired junior sales staff in preparation for business growth. It is notable that the number of part-time sales / service staff occupied the second largest forecast increase in manpower demand. As a result of the operational need to maintain the flexibility of manpower resources especially during peak season, demand for the 'Part-Time Sales/ Service Staff' would continue to grow.

2.22 At the supervisory level, 'Store Supervisor' with forecast growth of 0.5% from 2008 indicated that employers were ready to delegate their managerial duties to supervisory staff, resulting in an increasing demand for the job level.

2.23 'Store Manager' remained the most sought after job category in the managerial level, with demand expected to increase by 1.7%.

Manpower Forecast Using the Labour Market Analysis Approach

2.24 In addition to the forecast made by employers, a Labour Market Analysis ("LMA") approach, of which a detailed description of the mechanism involved is provided in **Appendix 6**, had been applied to project the next three years manpower demand for the retail trade from 2009 to 2011. Seven determinants had been identified and grouped into principal components:

- a. Total loans and advances [LAI]
- b. Composite consumer price index [CCPI]
- c. Property price index (private domestic) [PPI]
- d. Number of visitor arrivals [VAI]
- e. Export of services [XSER]
- f. Export of goods in quantum index [XGDS]
- g. Import of goods in quantum index [MGDS]

2.25 Based on the statistical model under the LMA approach, the manpower requirements for 2009 would drop 8.8% or 20 811 compared with 2008 figures. As in the 2008 survey, the employers' forecast manpower demand for 2009 showed a growth by 0.6% or 1 503. The contradictory results might be connected with the projection taken in the first quarter of 2009 while the economic indicators demonstrated a sharp fall, and the employers' forecast was made in October 2008. The projected manpower requirements for 2009 – 2011 are:

	Actual	LMA Forecast
2008	236 371	-
2009	-	215 560 (-8.8%)*
2010	-	220 526 (+2.3%)**
2011	-	221 867 (+0.6%)**

Note:

* As percentage change vs actual manpower in 2008.

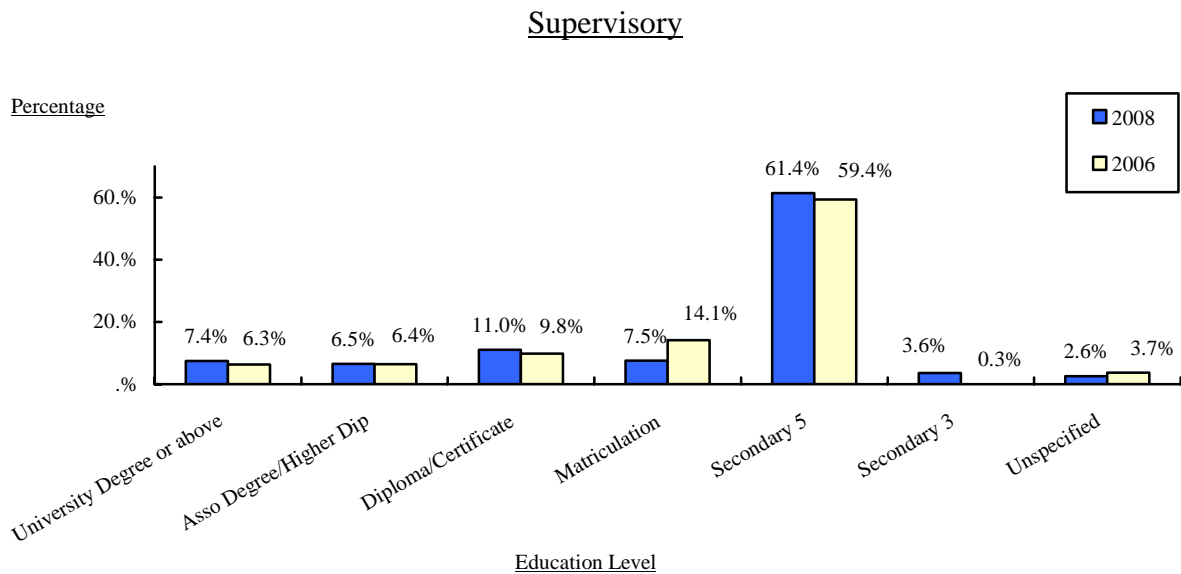
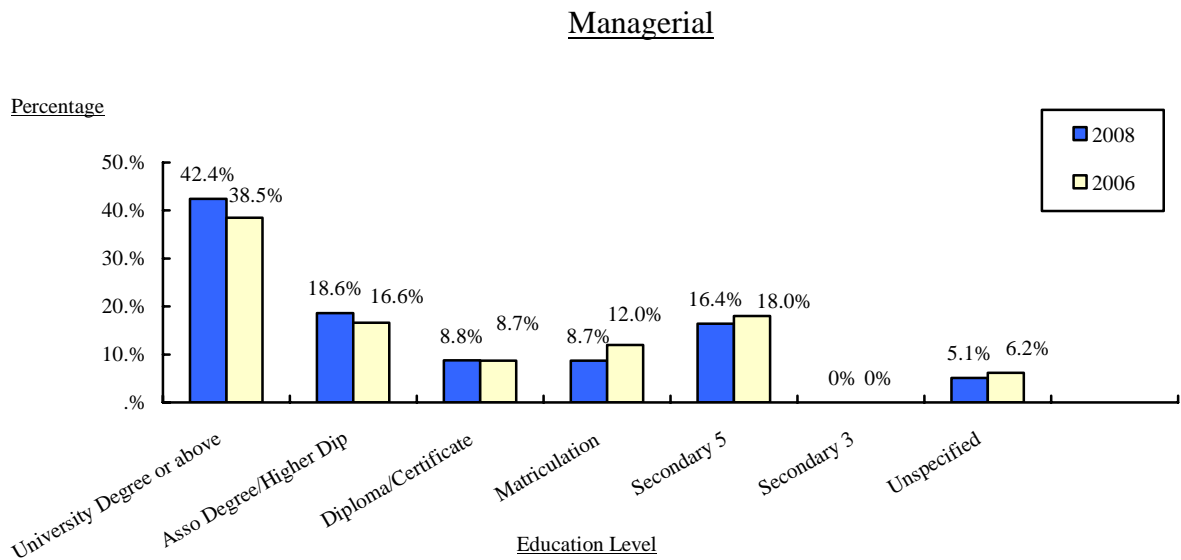
** As percentage change vs projected manpower in pervious year.

C. RECRUITMENT REQUIREMENTS

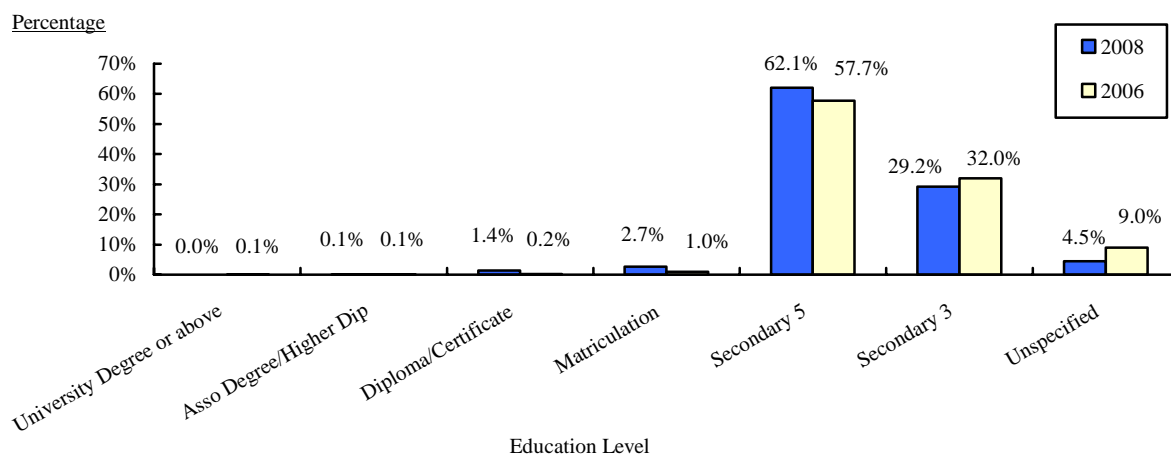
Preferred Level of Education of Employees

2.26 Employers' preferred education level of employees is summarized below. Detailed statistics are shown in Table 6 in Section V.

Figure 6: Preferred Education Level of Employees by Job Level, 2006 & 2008



Clerical/Operative



2.27 As shown in Figure 6 above, 42.4% of employers preferred managerial staff to have University or above education level, and 27.4% were satisfied with sub-degree level, i.e. Associate Degree, Higher Diploma and Diploma. For supervisory staff, only 7.4% of employers preferred University or above level, while 17.5% preferred sub-degree level and 68.9% were satisfied with Matriculation or Secondary 5 qualifications. Down to clerical/operative staff, a qualification of either Secondary 3 or Secondary 5, comprising 91.3% in total, was already acceptable to employers.

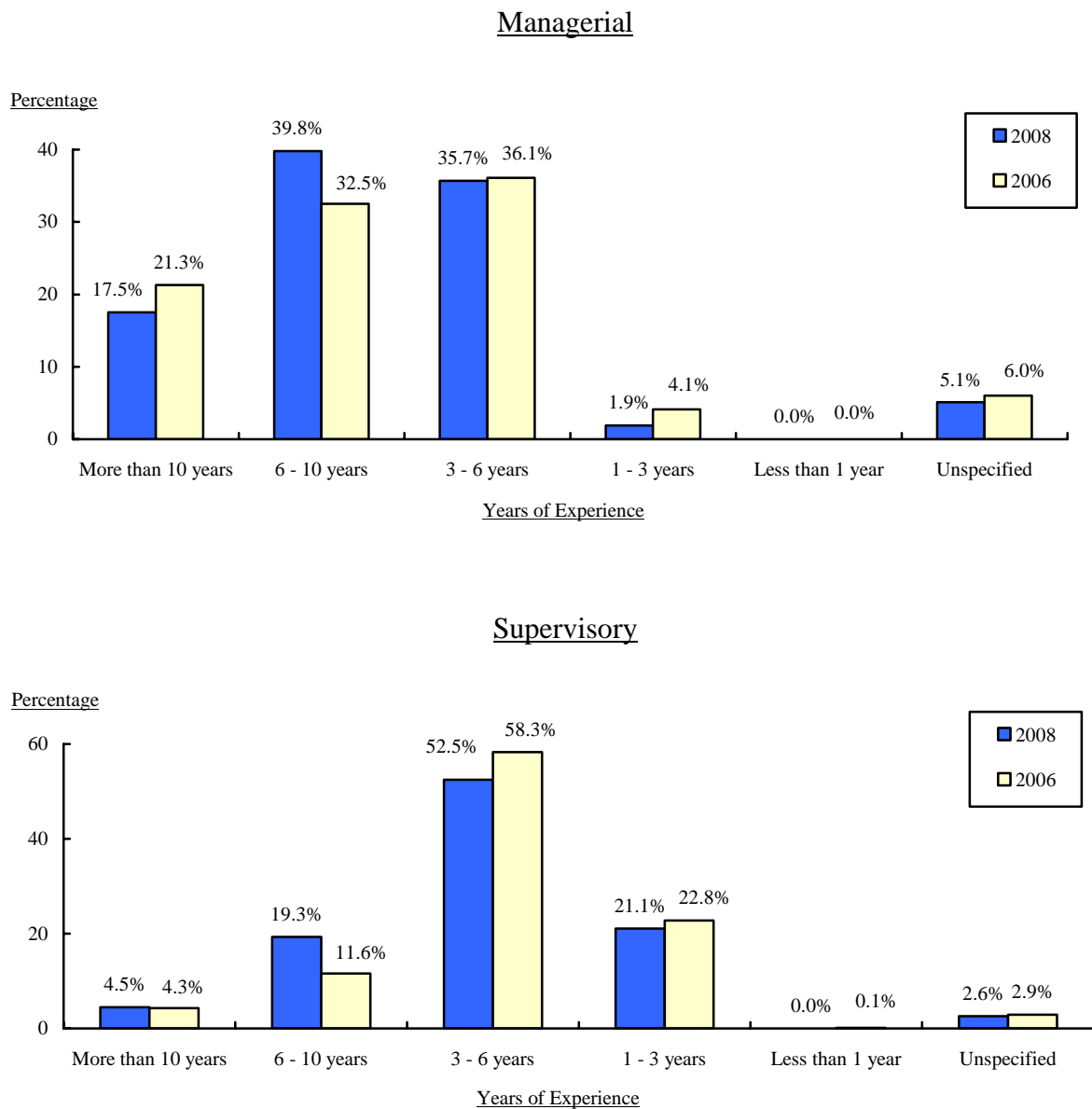
2.28 Compared with 2006, more employers in 2008 required their managerial and supervisory staff to be equipped with University or above qualifications, for the sake of upgrading the overall quality of service in the retail trade. The distinction among associate degree, diploma and matriculation, on the other hand, was blurred and did not make a big difference in the eyes of employers.

2.29 Another phenomenon which deserved attention was that the preference of employees with Secondary 5 education increased among supervisory or clerical/operative level. This was an indication that, employers preferred to employ candidates with higher qualifications in managerial level. On the whole, a qualification of Secondary 5 seemed to be the minimum requirement acceptable by most employers in retail trade.

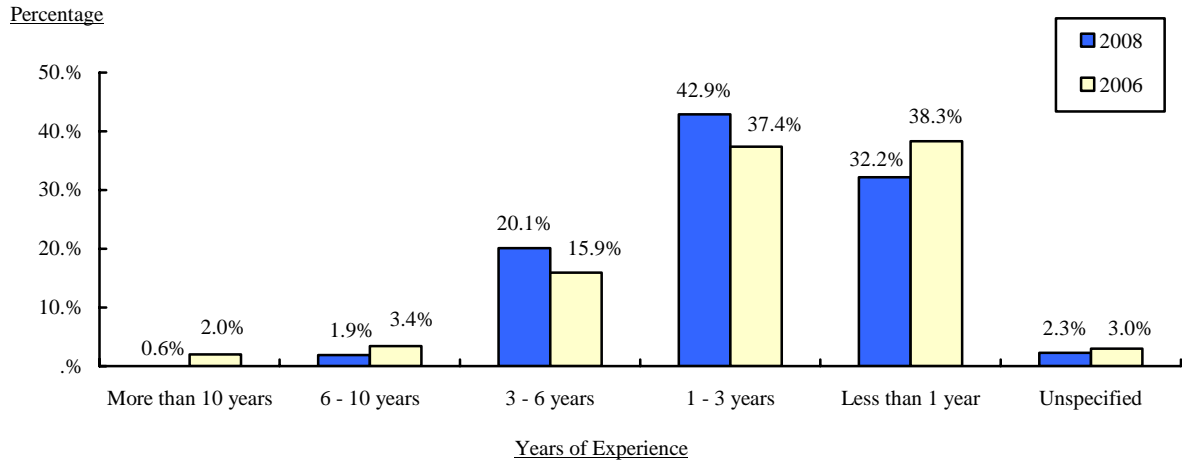
Preferred Relevant Years of Experience

2.30 Employers' preferred relevant years of experience of employees are summarized in Figure 7 below. Detailed statistics are shown in Table 7 in Section V.

Figure 7: Preferred Relevant Years of Experience by Job Level, 2006 & 2008



Clerical / Operative



2.31 As compared to the preferred level of education, employers in 2008 preferred their managerial staff to have more working experience but the percentage of employers preferring more than 10 years of experience recorded a slight decrease, indicating that more employers considered employees' education as a prime factor when they hired or promoted their managerial staff.

2.32 When compared with preferred education, the preference of clerical / operative staff with '1 - 3 years' and '3 - 6 years' working experience increased by 5.5% and 4.2% respectively. It indicated the significance of experience also set in when considering employing clerical / operative level staff, as upward trends appeared in this job level.

D. TRAINING REQUIREMENTS

2.33 Attention should be paid to the presented figures related to the training requirements as only companies with employment size of five persons or above (16.5%) were required to answer the questionnaires on training questions during the survey, and some 2006 figures had been adjusted to facilitate the direct comparison.

Training Needs

2.34 According to the survey, a total of 124 901 training places were either provided or sponsored by employers in 2008, representing a 12% drop as compared with 2006. Training place per person, contracted from 0.7 in 2006 to approximately 0.5 in 2008. Majority of training was for clerical /operative staff (79%), the provision of training to both managerial and supervisory levels and clerical / operative levels were on the decrease by 14.9% and 11.1% respectively.

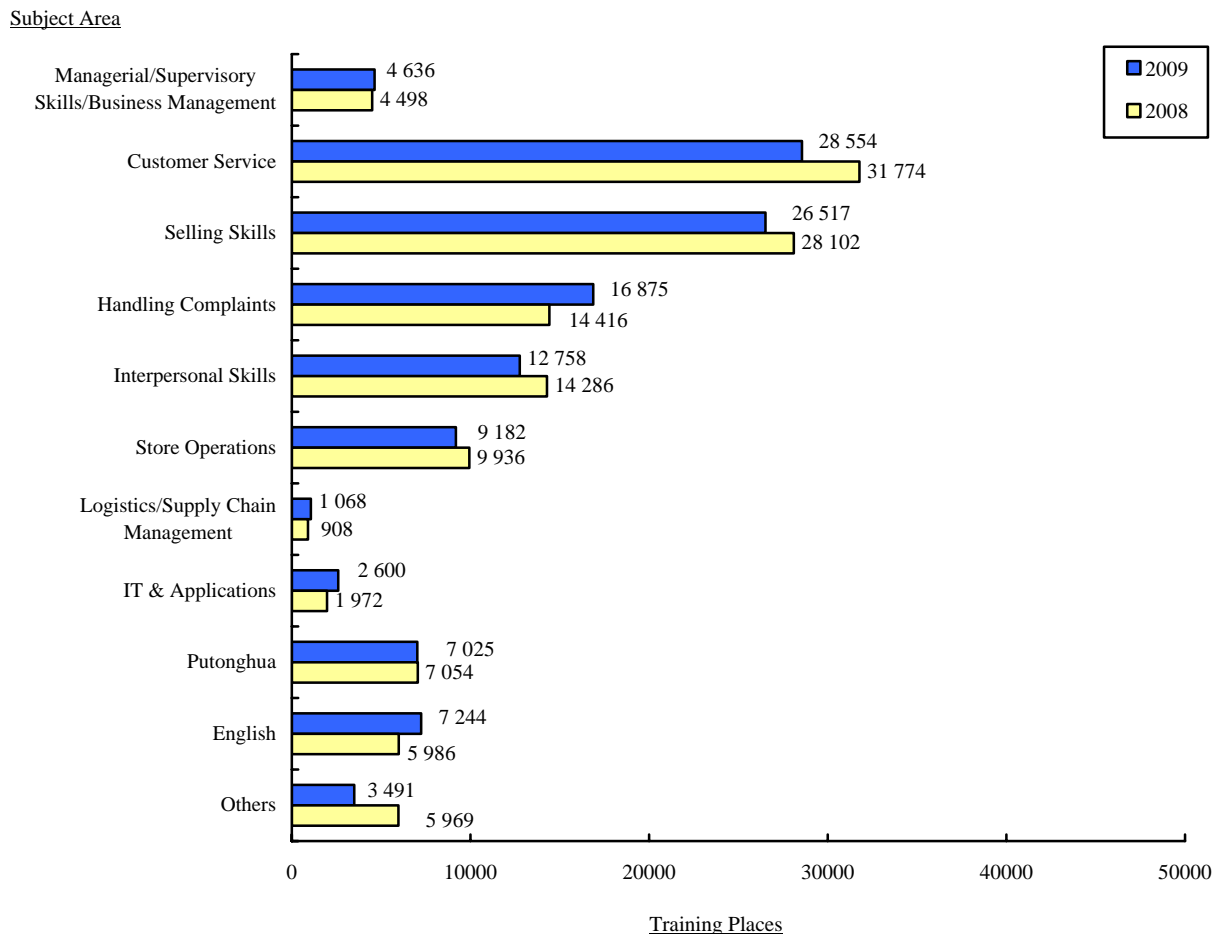
2.35 As revealed in the 2006 and 2008 surveys, the pattern in the areas of training provided also differed. In the 2006 survey, the figures showed that an increase of training places were seen only in 'Interpersonal Skills', 'Logistics ', and 'Supply Chain Management', all of which were targeted at frontline operational staff. However, training in all remaining areas showed a percentage drop in the 2008 survey irrespective of job level, meaning that basically employees had already received training in these areas before, revealing the decrease in training resources. Detailed statistics are shown in Tables 8 to 10 in Section V.

2.36 Figures also revealed that employers became more conservative on the provision of training in coming year. The forecast training places to be provided or sponsored by employers would decrease to 119 950 (4%) in 2009. Among the training areas, the biggest growth would be IT & Applications (31.8%) and English (21%), reflecting the attachment of greater importance to IT applications and effective communication to deal with business growth. Other areas where significant increases were expected included Logistics/Supply Chain Management (17.6%) and Handling Complaints (17.1%).

Training Places Provided / Sponsored by Employers

Subject Area	2008	2009 Forecast	Changes
1. Managerial / Supervisory Skills / Business Management	4 498	4 636	+138 (+3.1%)
2. Customer Service	31 774	28 554	-3 220 (-10.1%)
3. Selling Skills	28 102	26 517	-1 585 (-5.6%)
4. Handling Complaints	14 416	16 875	+2 459 (+17.1%)
5. Interpersonal Skills	14 286	12 758	-1 528 (-10.7%)
6. Store Operations	9 936	9 182	-754 (-7.6%)
7. Logistics / Supply Chain Management	908	1 068	+160 (+17.6%)
8. IT & Applications	1 972	2 600	+628 (+31.8%)
9. Putonghua	7 054	7 025	-29 (-0.4%)
10. English	5 986	7 244	+1 258 (+21.0%)
11. Others	5 969	3 491	-2 478 (-41.5%)
Total	124 901	119 950	-4 951 (-4.0%)

Figure 8: Comparison of Training Needs by Subject Area, 2008 & 2009



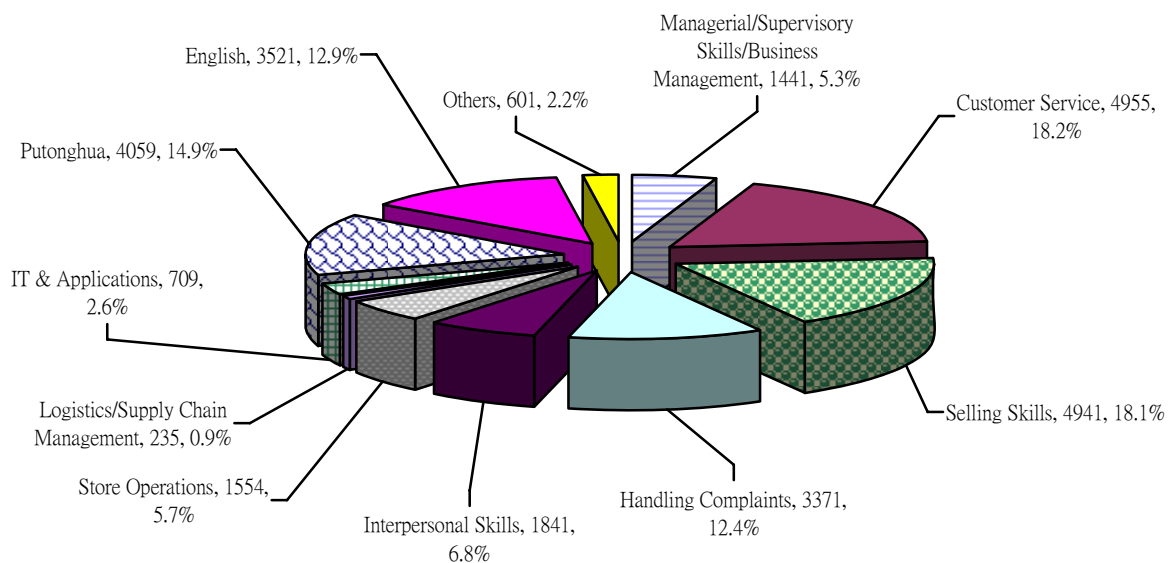
2.37 Of the 119 950 training places required in 2009, 92 722 places (77.3%) will be fulfilled by in-house training while external sources will be required to look after the remaining 27 228 (22.7%) training places.

2.38 Specifically, external training places required for the different subject areas in 2009 will be:

Subject Areas	Training Places Needed
1. Managerial / Supervisory Skills / Business Management	1 441
2. Customer Service	4 955
3. Selling Skills	4 941
4. Handling Complaints	3 371
5. Interpersonal Skills	1 841
6. Store Operations	1 554
7. Logistics / Supply Chain Management	235
8. IT & Applications	709
9. Putonghua	4 059
10. English	3 521
11. Others	601
Total	27 228

Figure 9 : Needs for External Training Places by Subject Area

(Total External Training Places Required: 27 228)



Pre-employment Training

2.39 Pre-employment training refers to training provided to people before they enter the workforce or before they are employed in a particular industry. In the 2008 survey, 50.8% (47.5% in 2006 vs 37.8% in 2004) indicated that pre-employment training was either a 'Pre-requisite' or 'Preferred', following the upward trend of past years. The figures indicated employers had a strong preference to hire already-trained employees. If analysed by branch, 'Department Stores', 'Telecommunications Equipment & Electrical Products' and 'Supermarkets' were at the top of the list. Detailed statistics are shown in Tables 11 and 12 in Section V.

Figure 10: Needs for Pre-employment Training for Frontline Sales Staff by Branch, 2006 & 2008

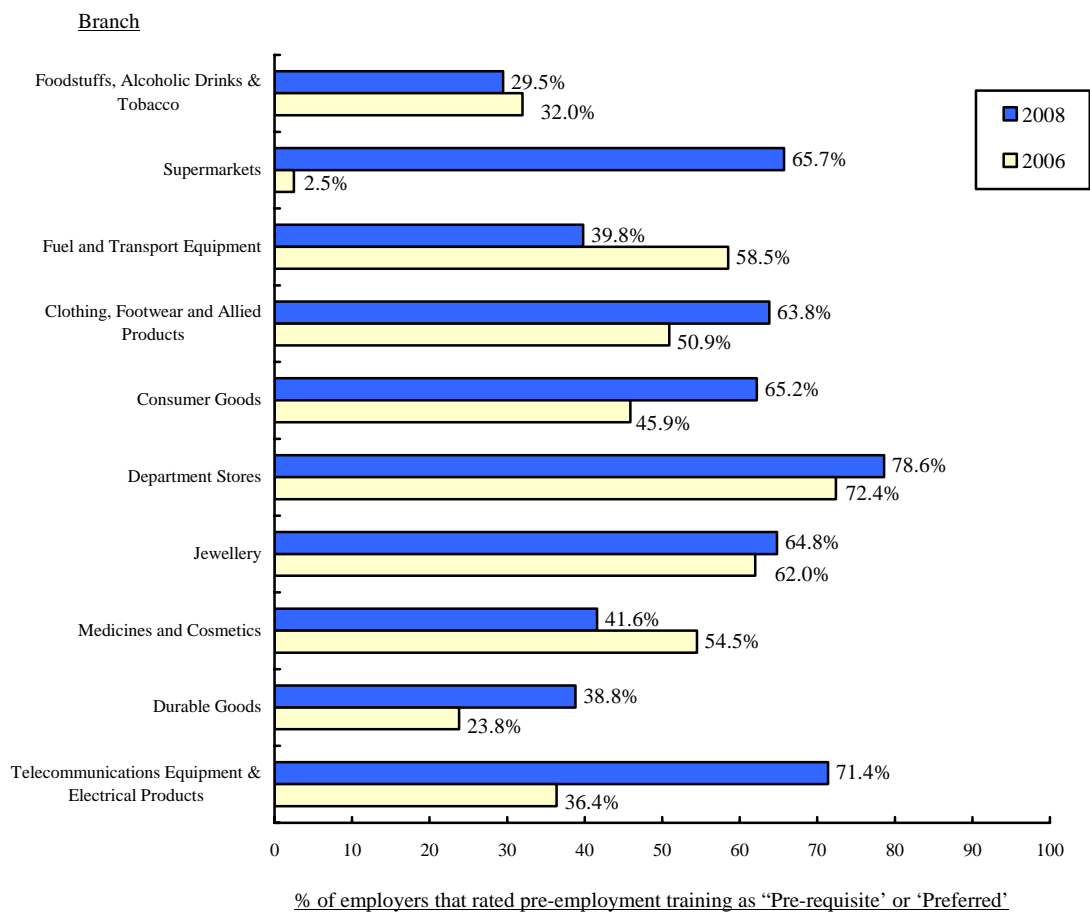
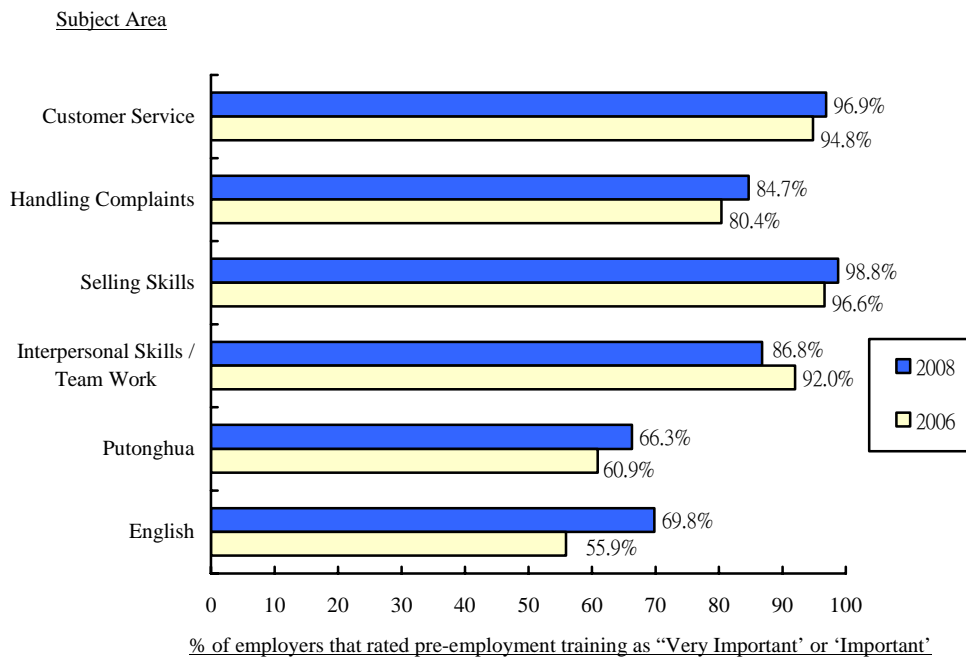


Figure 11: Needs for Pre-employment Training for Frontline Sales Staff by Subject Area, 2006 & 2008



2.40 Six subject areas were used to assess the need for pre-employment training and the top three areas where employers signified either 'Very Important' or 'Important' are shown in the following table. The results were in line with findings obtained in the 2006.

Subject Areas	Needs for Pre-employment Training either 'Very Important' or 'Important'
1. Selling Skills	98.8%
2. Customer Service	96.9%
3. Interpersonal Skills/ Team Work	86.8%

2.41 The greater emphasis on providing in-service training as well as the need for pre-employment training in 'Selling Skills', 'Customer Service' & 'Interpersonal Skills/Team Work' demonstrated the importance of selling techniques to facilitate the rise of sales volume in retail sector.

E. THE TRENDS

2.42 To coincide with the objective of the Survey in respect of the identification of the development of the overall manpower and training situation of the retail trade, trends over the past few years of several indicative parameters which warrant attention had been prepared and given below. The trends should, at the time of interpretation, be read in conjunction with the underlying economical environment then and direct comparison is not recommended.

2.43 Special attention should be paid to the trend of overall training needs because a sharp fall of 25.7% was not conclusive in overall presentation as only companies with employment size of five persons or above (16.5%) were required to answer the questionnaires on training questions. However, it was worth noting that such impact on the overall training needs was minimal as only 4 759 (3%) training places were provided or sponsored by employers of companies with size of four persons or less in 2006. It was believed that the trend still recorded a double-digit decrease. The result might be explained by the increasing importance of pre-employment training and the decreasing trend of staff turn-over rate.

(a) Total Manpower Demand of the Retail Trade

Year	Total Manpower Demand	
	In Number	Percentage Change (from previous survey)
2000	167 813	-
2002	206 758	+23.2%
2004	206 971	+0.1%
2006	223 121	+7.8%
2008	236 371	+5.9%

(b) Vacancies

Year	Vacancies	
	In Number	As a percentage of the total manpower demand
2000	3 121	1.9%
2002	1 166	0.6%
2004	4 083	2.0%
2006	4 206	1.9%
2008	5 142	2.2%

(c) Overall Training Needs

Year	Training Needs	
	Estimated Training Places Required in the next 12 months	Percentage Change (from previous survey)
2000	92 411	-
2002	133 308	+44.3%
2004	158 708	+19.1%
2006	161 479	+1.7%
2008	119 950 [#]	-25.7%

(d) Part-Time Sales Staff

Year	Part-Time Sales Staff*	
	In Number	Percentage Change (from previous survey)
2002	19 211	-
2004	25 862	+34.6%
2006	27 031	+4.5%
2008	28 848	+6.7%

Note:

* Including vacancies

Only companies with employment size of 5 persons or above (16.5%) indicated their training places.

(e) Staff Turnover Rate

Branch	Staff Turnover Rate		
	Man-times as a percentage of manpower demand by branch		
	2004	2006	2008
Foodstuffs, Alcoholic Drinks and Tobacco	21.1%	16.4%	10.4%
Supermarkets	27.9%	13.7%	13.9%
Fuel and Transport Equipment	14.4%	14.4%	10.9%
Clothing, Footwear and Allied Products	30.0%	21.1%	14.6%
Consumer Goods	18.3%	8.1%	9.2%
Department Stores	39.4%	10.0%	12.8%
Jewellery	20.6%	12.4%	11.8%
Medicines and Cosmetics	20.3%	13.6%	13.4%
Durable Goods	27.6%	25.0%	13.1%
Telecommunications Equipment & Electrical Products	23.6%	21.7%	23.5%
Trade Average	23.7%	15.0%	12.7%

Job Level	Staff Turnover Rate		
	Man-times as a percentage of manpower demand by job level		
	2004	2006	2008
Managerial Staff	12.5%	10.1%	6.8%
Supervisory Staff	7.2%	8.5%	4.3%
Clerical/Operative Staff	31.5%	18.1%	18.7%

SECTION III

RECOMMENDATIONS

A. TRAINING NEEDS

3.1 According to the survey findings, 119 950 training places will be required in the next 12 months, of which 92 722 will be met by in-house training and 27 228 in-service training places to be provided by external training bodies, broken down by main subject areas as shown in the table below.

Subject Areas	Training Places Provided by External Training Bodies
Managerial / supervisory skills	1 441
Trade specific skills	17 606
Languages	7 580
Others	601
Total	27 228

3.2 The short to medium-term business outlook for the retail trade is generally uncertain and expected to have a slower growth with the IVS measures and stimulus efforts by the governments. To match with external training needs as indicated by employers, the Training Board recommends:

- (a) For those companies with little and no resources for internal training, the Skills Upgrading Scheme (SUS) and Continuing Education Fund (CEF) funded by the HKSAR Government provide financial assistance for in-services training to meet the skills requirement of the industry. Hence, the Training Board supports the continuation of these financial measures to help the trade.
- (b) The relaxation of the eligibility criteria and the increase in the number of retraining places offered by the Employees Retraining Board (ERB) help the unemployed persons of the industry re-enter into the workforce to stabilize the employment rate.
- (c) The retail-related competencies as Applied Learning Course in the New Secondary School Curriculum should be included so as to enable students to understand the fundamental theories and concepts of the retail trade, and provide students with opportunities to explore their career aspirations in retail areas.

Qualifications Framework

3.3 The Qualifications Framework (QF) launched by the Government is a seven-level cross-sectoral hierarchy covering both academic and vocational qualifications required by various industries. With unified standards of qualifications and clear indication of the articulation ladders between them, the QF enables learners to set clear goals and direction for obtaining quality-assured qualifications. The Government has been assisting in various industries setting up their Industry Training Advisory Committees (ITACs) in stages and the Training Board urges the formation of ITAC for retail industry under the QF so that employees will be able to acquire knowledge and skills according to industry needs and they will be provided a clear learning pathway in pursuing their career development.

The Training Services Providers

3.4 There appears to be growing number of inbound tourists travel to Hong Kong. In these instances, more training in the areas of languages and trade specific skills are needed.

3.5 On top of expanding the scope of training, training institutions such as the Vocational Training Council are advised to devise multiple training modes such as e-learning and module accumulation programme to offer more flexibility to those employees who have long working hours that are unable to attend the programme regularly or work shift.

3.6 Apart from in-service training, pre-employment training should not be overlooked in order to draw more qualified young people into the trades. Hence, basic knowledge and skills about the trade can be built into the curriculum of some vocational training courses to prepare students for easier adaptation to the job after graduation.

Employers

3.7 Training on languages, sales and customer service are the core areas for retail sector. To achieve this, companies could invite some training services providers to develop tailor made training courses for their employees in trade specific skills.

3.8 Effectiveness of training relies very much on employers' support. As an incentive to encourage employees to attend and complete training courses, employers are advised to offer various incentives, such as providing time off, monetary subsidies or promotion opportunities wherever possible.

Employees

3.9 To capitalize on the efforts and resource pooled by the other stakeholders most effectively, the mindsets of the employees are equally important. They should strive to develop a vision and be aware of the importance of life-long learning. Employees have to face the changing needs of the trade in order to stay in a competitive and volatile retail industry.

B. FUTURE SURVEYS

3.10 The Training Board recommends that manpower surveys should continue to be conducted once every two years with a view to bringing stakeholders to a better understanding of the manpower situation in the retail trade and be proactive in taking appropriate actions in anticipation of forthcoming changes.

SECTION IV

SCOPE AND METHODOLOGY OF SURVEY

A. RETAIL TRADE TRAINING BOARD

The Training Board

4.1 The Retail Trade Training Board of the Vocational Training Council is appointed by the HKSAR Government to be responsible for, among other duties, assessing the manpower situation and training needs in the retail trade and recommending to the Vocational Training Council measures to meet these needs. The Training Board's Terms of Reference and Membership List are given in **Appendices 1 and 2**.

Working Group on Manpower Survey

4.2 Under the Training Board, a Working Group had been formed to manage and guide the survey in the processes of questionnaire design, sampling, data analysis and reporting, with the assistance of the Census and Statistics Department. Membership of the Working Group is given in **Appendix 3**.

In-Depth Interviews

4.3. Several In Depth Interviews had been conducted to collect views on the outlook of the economic and manpower perspective of the Industry. The list of the In-Depth Interviews participants is given in **Appendix 4**.

Changes made in the 2008 Survey

4.4 As compared with the 2006 survey, the following changes had been adopted to further enhance the effectiveness of data collection and to follow more closely the market trend:

- (a) New job title "Order Assistant (Online Services)" was added in the survey to cope with the new services provided by the trade.
- (b) Companies employing four persons or less were only requested to complete Part I (basic information) of the questionnaire without any training related questions asked.

4.5 The Training Board is of the view that the above changes would result in an improvement in the quality of data collected and better fulfill the purpose of identifying both the manpower and training needs of the retail industry, thus enabling different stakeholders to take appropriate actions, if required.

B. SCOPE AND PROCEDURES

Scope of the Survey

4.6 Out of the 36 155* registered companies in the retail industry, a sample comprising 674 companies covering 10 branches was selected by the stratified random sampling method, broken down according to the table below.

	Branch	Sample Size
1	Foodstuffs, Alcoholic Drinks and Tobacco	84
2	Supermarkets	31
3	Fuel and Transport Equipment	61
4	Clothing, Footwear and Allied Products	142
5	Consumer Goods	89
6	Department Stores	30
7	Jewellery	65
8	Medicines and Cosmetics	58
9	Durable Goods	45
10	Telecommunications Equipment & Electrical Products	69
	Total	674

Procedures of the Survey

4.7 A Briefing Session was held on 13 October 2008. The purpose of the Session was to brief fieldwork officers of the Census and Statistics Department (“C&SD”) on the manpower situation and the nature of various jobs of the retail trade; and to help the officers to have a better understanding of the retail sector before they carried out the fieldwork.

4.8 The fieldwork took place in October 2008, with the majority of questionnaires completed and returned in the first few months.

4.9 Questionnaires with explanatory notes and job descriptions were first sent to the sampled companies before the fieldwork. The survey documents are attached in **Appendix 5**.

4.10 Interviewing officers from the C&SD visited the sampled companies to assist the completion of questionnaire and to ensure proper collection of information. The completed questionnaires were checked, coded and where necessary verified with the respondents. The survey data were then processed and tabulated by the C&SD.

Note:

* The figure of 36 155 refers to the number of registered companies at company level based on the record of Central Register of Establishments (CRE) excluding those inactive companies in the trade. The total size of the trade of 2008 was 42 695.

Response Rate

4.11 Of the 674 companies selected, 510 complete questionnaires had been received while 26 companies refused to respond. The rest of the companies were either non-contactable, were not engaged in retail trade had merged, moved, ceased operation or closed down. The overall effective response rate was 95.1%.

SECTION V

LIST OF STATISTICAL TABLES

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2008 Retail Trade Manpower Survey

Table 1 : Number of Companies, Employees, Vacancies and Total Manpower Demand by Branch

	Branch	Number of Companies	No. of Employees at Date of Survey	No. of Vacancies at Date of Survey	Total Manpower Demand (Numbers Employed + Vacancies)	Employers' Forecast for 2009	Changes on 2008	Changes (%) on 2008
1	Foodstuffs, Alcoholic Drinks and Tobacco	9 330	40 287	482	40 769	40 945	176	0.4%
2	Supermarkets	117	24 851	925	25 776	25 761	- 15	-0.1%
3	Fuel and Transport Equipment	947	7 283	29	7 312	7 307	- 5	-0.1%
4	Clothing, Footwear and Allied Products	8 254	49 146	1 234	50 380	50 443	63	0.1%
5	Consumer Goods	11 368	46 467	1 036	47 503	48 218	715	1.5%
6	Department Stores	28	10 659	256	10 915	11 056	141	1.3%
7	Jewellery	1 348	11 086	193	11 279	11 323	44	0.4%
8	Medicines and Cosmetics	1 257	16 813	355	17 168	17 243	75	0.4%
9	Durable Goods	1 771	11 815	563	12 378	12 365	- 13	-0.1%
10	Telecommunications Equip & Elec Products	1 735	12 822	69	12 891	13 213	322	2.5%
	Total	36 155*	231 229#	5 142	236 371	237 874	1 503	0.6%

Note:

* The figure of 36 155 refers to the number of registered companies at company level based on the record of Central Register of Establishments (CRE) excluding those inactive companies in the trade. The total number of companies at company level in 2008 was 42 695.

Including both Technical Manpower (205 806) and Non-Technical Manpower (25 423).

2008 Retail Trade Manpower Survey
Table 2 : Distribution of Employees by Branch and Job Level

	Branch	Managerial	Supervisory	Clerical/ Operative	Part Time Sales/ Service Staff**	Owner/Sole Proprietor	Branch Total	% to Total
1	Foodstuffs, Alcoholic Drinks and Tobacco	679	5 721	20 792	5 298	7 797	40 287	17.4%
2	Supermarkets	1 410	2 864	11 405	9 172	0	24 851	10.7%
3	Fuel and Transport Equipment	291	1 053	5 452	136	351	7 283	3.1%
4	Clothing, Footwear and Allied Products	2 590	8 493	30 018	4 727	3 318	49 146	21.3%
5	Consumer Goods	1 547	7 987	28 275	3 646	5 012	46 467	20.1%
6	Department Stores	622	1 961	6 470	1 606	0	10 659	4.6%
7	Jewellery	774	1 741	7 750	241	580	11 086	4.8%
8	Medicines and Cosmetics	1 381	2 761	10 717	1 499	455	16 813	7.3%
9	Durable Goods	768	2 007	7 828	710	502	11 815	5.1%
10	Telecommunications Equip & Elec Products	605	2 071	9 443	223	480	12 822	5.5%
	Total	10 667	36 659	138 150	27 258	18 495	231 229*	100.0%

Note:

* Including both Technical Manpower (205 806) and Non-Technical Manpower (25 423)

** The number refers to headcounts.

2008 Retail Trade Manpower Survey

Table 3 : 2006 and 2008 Manpower Comparison by Branch

	Branch	2006 Total Manpower Demand	2008 Total Manpower Demand	2008 vs 2006 (%)	Employers' Forecast for 2009	2009 vs 2008 (%)
1	Foodstuffs, Alcoholic Drinks and Tobacco	41 507	40 769	-1.8%	40 945	0.4%
2	Supermarkets	28 387	25 776	-9.2%	25 761	-0.1%
3	Fuel and Transport Equipment	8 910	7 312	-17.9%	7 307	-0.1%
4	Clothing, Footwear and Allied Products	36 584	50 380	37.7%	50 443	0.1%
5	Consumer Goods	44 254	47 503	7.3%	48 218	1.5%
6	Department Stores	12 385	10 915	-11.9%	11 056	1.3%
7	Jewellery	11 236	11 279	0.4%	11 323	0.4%
8	Medicines and Cosmetics	16 726	17 168	2.6%	17 243	0.4%
9	Durable Goods	11 555	12 378	7.1%	12 365	-0.1%
10	Telecommunications Equip & Elec Products	11 577	12 891	11.4%	13 213	2.5%
	Total	223 121	236 371	5.9%	237 874	0.6%

2008 Retail Trade Manpower Survey
Table 4 : Number of Employees, Vacancies and Total Manpower Demand by Job

Job Code	Job	2008			Forecast for 2009		
		No. of Employees at Date of Survey	No. of Vacancies at Date of Survey	Total Manpower Demand (Numbers Employed + Vacancies)	Employers' Forecast for 2009	Changes on 2008	Changes (%)
Managerial							
111	General Manager	626	1	627	627	0	0.0%
112	Operations / Retail Manager	1 566	3	1 569	1 566	-3	-0.2%
113	District / Area Manager	685	18	703	704	1	0.1%
114	Store Manager	3 823	129	3 952	4 019	67	1.7%
115	Marketing Manager	623	5	628	620	-8	-1.3%
116	Sales Manager	501	15	516	489	-27	-5.2%
117	Customer Services Manager	89	1	90	89	-1	-1.1%
118	Head of Merchandising / Buying Manager	533	4	537	538	1	0.2%
119	Logistics / Distribution / Warehouse Manager	186	1	187	187	0	0.0%
120	Training Manager	98	1	99	100	1	1.0%
	Sub Total	8 730	178	8 908	8 939	31	0.3%
Supervisory							
211	Store Supervisor	28 330	188	28 518	28 648	130	0.5%
212	Visual Merchandising Supervisor	350	1	351	351	0	0.0%
213	Logistics / Distribution / Warehouse Supervisor	699	1	700	701	1	0.1%
214	Public Relations Officer / Advertising Officer	553	7	560	563	3	0.5%
215	Customer Services Supervisor	590	8	598	602	4	0.7%
216	Merchandiser / Buyer	2 663	24	2 687	2 732	45	1.7%
217	Training Officer	132	12	144	147	3	2.1%
	Sub Total	33 317	241	33 558	33 744	186	0.6%
Clerical / Operative							
311	Senior Sales Staff	41 887	352	42 239	42 356	117	0.3%
312	Junior Sales Staff	66 729	2 422	69 151	70 282	1 131	1.6%
313	Stock / Purchasing Clerk	2 039	5	2 044	2 041	- 3	-0.1%
314	Stock Assistant	6 316	155	6 471	6 505	34	0.5%
315	Order Assistant (Online services)	1 035	70	1 105	1 105	0	0.0%
411	Part Time Sales / Service Staff*	27 258	1 590	28 848	29 114	266	0.9%
	Sub Total	145 264	4 594	149 858	151 403	1 545	1.0%
198	Owner / Sole Proprietor / Working Partner	18 495	0	18 495	18 495	0	0.0%
Total Technical Manpower		205 806	5 013	210 819	212 581	1 762	0.8%
199	Other Managers	1 937	5	1 942	1 837	-105	-5.4%
299	Other Supervisors	3 342	13	3 355	3 302	- 53	-1.6%
399	Other Clerks / Supportive Staff	20 144	111	20 255	20 154	- 101	-0.5%
Total Workforce		231 229	5 142	236 371	237 874	1 503	0.6%

Note:

* The number refers to headcounts.

2008 Retail Trade Manpower Survey
Table 5 : 2006 and 2008 Manpower Comparison by Job

Job Code	Job	2006 Total Manpower Demand	2008 Total Manpower Demand	2008 vs 2006	Employers' Forecast for 2009	2009 vs 2008
Managerial						
111	General Manager	601	627	4.3%	627	0.0%
112	Operations / Retail Manager	1 108	1 569	41.6%	1 566	-0.2%
113	District / Area Manager	704	703	-0.1%	704	0.1%
114	Store Manager	3 029	3 952	30.5%	4 019	1.7%
115	Marketing Manager	440	628	42.7%	620	-1.3%
116	Sales Manager	472	516	9.3%	489	-5.2%
117	Customer Services Manager	105	90	-14.3%	89	-1.1%
118	Head of Merchandising / Buying Manager	504	537	6.5%	538	0.2%
119	Logistics / Distribution / Warehouse Manager	173	187	8.1%	187	0.0%
120	Training Manager	70	99	41.4%	100	1.0%
	Sub Total	7 206	8 908	23.6%	8 939	0.3%
Supervisory						
211	Store Supervisor	16 303	28 518	74.9%	28 648	0.5%
212	Visual Merchandising Supervisor	299	351	17.4%	351	0.0%
213	Logistics / Distribution / Warehouse Supervisor	596	700	17.4%	701	0.1%
214	Public Relations Officer / Advertising Officer	375	560	49.3%	563	0.5%
215	Customer Services Supervisor	619	598	-3.4%	602	0.7%
216	Merchandiser / Buyer	1 838	2 687	46.2%	2 732	1.7%
217	Training Officer	104	144	38.5%	147	2.1%
	Sub Total	20 134	33 558	66.7%	33 744	0.6%
Clerical / Operative						
311	Senior Sales Staff	44 795	42 239	-5.7%	42 356	0.3%
312	Junior Sales Staff	61 595	69 151	12.3%	70 282	1.6%
313	Stock / Purchasing Clerk	1 576	2 044	29.7%	2 041	-0.1%
314	Stock Assistant	4 379	6 471	47.8%	6 505	0.5%
315	Order Assistant (Online services)	0	1 105	0.0%	1 105	0.0%
411	Part Time Sales / Service Staff*	27 031	28 848	6.7%	29 114	0.9%
	Sub Total	139 376	149 858	7.5%	151 403	1.0%
198	Owner / Sole Proprietor / Working Partner	29 634	18 495	-37.6%	18 495	0.0%
Total Technical Manpower		196 350	210 819	7.4%	212 581	0.8%
199	Other Managers	1 613	1 942	20.4%	1 837	-5.4%
299	Other Supervisors	4 077	3 355	-17.7%	3 302	-1.6%
399	Other Clerks / Supportive Staff	21 081	20 255	-3.9%	20 154	-0.5%
Total Workforce		223 121	236 371	5.9%	237 874	0.6%

Note:

* The number refers to headcounts.

2008 Retail Trade Manpower Survey
Table 6 : Preferred Education of Employees by Job

Job	University Degree or above	Associate Degree / Professional Diploma / Higher Diploma / Higher Certificate or equivalent	Diploma / Certificate or equivalent	Matriculation	Secondary 5	Secondary 3	Others	Unspecified	Total
Managerial Level									
General Manager	479	9	1	36	70	0	0	31	626
Operations / Retail Manager	868	247	142	92	208	0	0	9	1 566
District / Area Manager	251	146	189	18	49	0	0	32	685
Store Manager	884	905	326	506	902	0	0	300	3 823
Marketing Manager	337	111	23	9	131	0	0	12	623
Sales Manager	297	73	31	53	42	0	0	5	501
Customer Services Manager	55	5	9	2	3	0	0	15	89
Head of Merchandising / Buying Manager	346	86	24	33	20	0	0	24	533
Logistics / Distribution / Warehouse Manager	120	24	15	10	7	0	0	10	186
Training Manager	68	17	8	2	0	0	0	3	98
Sub Total	3 705	1 623	768	761	1 432	0	0	441	8 730
% by Job Level (Total : 8 730)	42.4%	18.6%	8.8%	8.7%	16.4%	0.0%	0.0%	5.1%	100.0%
Supervisory Level									
Store Supervisor	1 748	1 492	2 236	2 238	19 030	973	0	613	28 330
Visual Merchandising Supervisor	48	85	99	51	57	0	0	10	350
Logistics / Distribution / Warehouse Supervisor	44	48	156	54	375	13	0	9	699
Public Relations Officer / Advertising Officer	231	96	108	26	82	0	0	10	553
Customer Services Supervisor	61	84	64	42	284	0	0	55	590
Merchandiser / Buyer	279	312	985	77	628	212	0	170	2 663
Training Officer	51	42	17	5	11	0	0	6	132
Sub Total	2 462	2 159	3 665	2 493	20 467	1 198	0	873	33 317
% by Job Level (Total : 33 317)	7.4%	6.5%	11.0%	7.5%	61.4%	3.6%	0.0%	2.6%	100.0%
Clerical / Operative Level									
Senior Sales Staff	0	52	878	1 528	31 581	5 561	1 007	1 280	41 887
Junior Sales Staff	0	60	496	1 763	44 544	18 697	98	1 071	66 729
Stock / Purchasing Clerk	0	15	148	248	1 358	191	0	79	2 039
Stock Assistant	0	0	32	46	2 556	3 497	71	114	6 316
Order Assistant (Online services)	0	0	268	0	717	10	0	40	1 035
Part Time Sales / Service Staff*	0	0	165	341	9 481	14 482	1 996	793	27 258
Sub Total	0	127	1 987	3 926	90 237	42 438	3 172	3 377	145 264
% by Job Level (Total : 145 264)	0.0%	0.1%	1.4%	2.7%	62.1%	29.2%	2.2%	2.3%	100.0%

Note:

* The number refers to headcounts.

2008 Retail Trade Manpower Survey

Table 7 : Preferred Relevant Years of Experience of Employees by Job

Job	More than 10 years	6 - 10 years	3 - 6 years	1 - 3 years	Less than 1 year	Unspecified	Total
Managerial Level							
General Manager	255	202	138	0	0	31	626
Operations / Retail Manager	198	769	495	95	0	9	1 566
District / Area Manager	142	368	139	4	0	32	685
Store Manager	643	1 394	1 429	57	0	300	3 823
Marketing Manager	32	168	411	0	0	12	623
Sales Manager	42	274	175	5	0	5	501
Customer Services Manager	13	33	28	0	0	15	89
Head of Merchandising / Buying Manager	135	158	214	2	0	24	533
Logistics / Distribution / Warehouse Manager	51	69	53	3	0	10	186
Training Manager	18	43	33	1	0	3	98
Sub Total	1 529	3 478	3 115	167	0	441	8 730
% by Job Level (Total : 8 730)	17.5%	39.8%	35.7%	1.9%	0.0%	5.1%	100.0%
Supervisory Level							
Store Supervisor	1 463	5 943	14 513	5 798	0	613	28 330
Visual Merchandising Supervisor	7	49	214	70	0	10	350
Logistics / Distribution / Warehouse Supervisor	4	47	522	117	0	9	699
Public Relations Officer / Advertising Officer	2	58	330	153	0	10	553
Customer Services Supervisor	7	13	153	362	0	55	590
Merchandiser / Buyer	1	314	1 688	490	0	170	2 663
Training Officer	2	18	66	40	0	6	132
Sub Total	1 486	6 442	17 486	7 030	0	873	33 317
% by Job Level (Total : 33 317)	4.5%	19.3%	52.5%	21.1%	0.0%	2.6%	100.0%
Clerical / Operative Level							
Senior Sales Staff	885	1 664	25 410	12 098	550	1 280	41 887
Junior Sales Staff	0	90	2 874	39 319	23 375	1 071	66 729
Stock / Purchasing Clerk	0	7	370	1 338	245	79	2 039
Stock Assistant	0	99	377	2 634	3 092	114	6 316
Order Assistant (Online services)	0	0	128	141	726	40	1 035
Part Time Sales / Service Staff*	31	840	8	6 812	18 774	793	27 258
Sub Total	916	2 700	29 167	62 342	46 762	3 377	145 264
% by Job Level (Total : 145 264)	0.6%	1.9%	20.1%	42.9%	32.2%	2.3%	100.0%

Note:

* The number refers to headcounts.

2008 Retail Trade Manpower Survey

Table 8 : Number of Training Places Provided / Sponsored by Employers in the Past 12 Months by Job Level

Subject Areas	Managerial & Supervisory	Clerical / Operative	Total	Employers' Forecast for 2009	2009 vs 2008
Managerial Training					
Managerial / Supervisory Skills / Business Management	4 071	427	4 498	4 636	3.1%
Trade Specific Training					
Customer Service	3 937	27 837	31 774	28 554	-10.1%
Selling Skills	4 006	24 096	28 102	26 517	-5.6%
Handling Complaints	2 530	11 886	14 416	16 875	17.1%
Interpersonal Skills	2 730	11 556	14 286	12 758	-10.7%
Store Operations	5 400	4 536	9 936	9 182	-7.6%
Logistics / Supply Chain Management	368	540	908	1 068	17.6%
IT & Applications	591	1 381	1 972	2 600	31.8%
Languages					
Putonghua	981	6 073	7 054	7 025	-0.4%
English	739	5 247	5 986	7 244	21.0%
Others	803	5 166	5 969	3 491	-41.5%
Total	26 156	98 745	124 901	119 950	-4.0%

Note:

1. Companies with employment size of 4 persons or less were excluded.

2008 Retail Trade Manpower Survey

Table 9 : Forecast Number of Training Places to be Provided / Sponsored by Employers in the Next 12 Months by Job Level

Subject Areas	Managerial & Supervisory	Clerical / Operative	Total	% of Training Places to be Provided Internally	% of Training Places to be Provided Externally	External Training Places Required
Managerial Training						
Managerial / Supervisory Skills / Business Management	4 303	333	4 636	68.9%	31.1%	1 441
Trade Specific Training						
Customer Service	3 749	24 805	28 554	82.6%	17.4%	4 955
Selling Skills	3 505	23 012	26 517	81.4%	18.6%	4 941
Handling Complaints	3 081	13 794	16 875	80.0%	20.0%	3 371
Interpersonal Skills	2 853	9 905	12 758	85.6%	14.4%	1 841
Store Operations	4 578	4 604	9 182	83.1%	16.9%	1 554
Logistics / Supply Chain Management	488	580	1 068	78.0%	22.0%	235
IT & Applications	629	1 971	2 600	72.7%	27.3%	709
Languages						
Putonghua	1 053	5 972	7 025	42.2%	57.8%	4 059
English	1 400	5 844	7 244	51.4%	48.6%	3 521
Others	648	2 843	3 491	82.8%	17.2%	601
Total	26 287	93 663	119 950	77.3%	22.7%	27 228

Note:

1. Companies with employment size of 4 persons or less were excluded.

2008 Retail Trade Manpower Survey

Table 10 : 2006 and 2008 Comparison of Training Places Provided / Sponsored by Employers

Subject Areas	2006	2008	2008 vs 2006	Employers' Forecast for 2009	2009 vs 2008
Managerial Training					
Managerial / Supervisory Skills / Business Management	7 237	4 498	-37.8%	4 636	3.1%
Trade Specific Training					
Customer Service	35 374	31 774	-10.2%	28 554	-10.1%
Selling Skills	31 788	28 102	-11.6%	26 517	-5.6%
Handling Complaints	14 200	14 416	1.5%	16 875	17.1%
Interpersonal Skills	11 514	14 286	24.1%	12 758	-10.7%
Store Operations	14 441	9 936	-31.2%	9 182	-7.6%
Logistics / Supply Chain Management	854	908	6.3%	1 068	17.6%
IT & Applications	4 325	1 972	-54.4%	2 600	31.8%
Languages					
Putonghua	7 351	7 054	-4.0%	7 025	-0.4%
English	6 901	5 986	-13.3%	7 244	21.0%
Others	7 877	5 969	-24.2%	3 491	-41.5%
Total	141 862	124 901	-12.0%	119 950	-4.0%

Note:

1. Companies with employment size of 4 persons or less were excluded.

2008 Retail Trade Manpower Survey

Table 11 : Needs for Pre-employment Training for Frontline Sales Staff by Branch

	Branch	Pre-requisite	Preferred	No comment	Not necessary	Unspecified	Total
1	Foodstuffs, Alcoholic Drinks and Tobacco	132	320	614	466	0	1 532
		8.6%	20.9%	40.1%	30.4%	0.0%	
2	Supermarkets	8	36	7	14	2	67
		11.9%	53.7%	10.4%	20.9%	3.0%	
3	Fuel and Transport Equipment	12	86	98	50	0	246
		4.9%	35.0%	39.8%	20.3%	0.0%	
4	Clothing, Footwear and Allied Product	281	449	97	300	17	1 144
		24.6%	39.2%	8.5%	26.2%	1.5%	
5	Consumer Goods	165	711	37	429	2	1 344
		12.3%	52.9%	2.8%	31.9%	0.1%	
6	Department Stores	5	17	1	2	3	28
		17.9%	60.7%	3.6%	7.1%	10.7%	
7	Jewellery	43	154	39	68	0	304
		14.1%	50.7%	12.8%	22.4%	0.0%	
8	Medicines and Cosmetics	52	156	148	138	6	500
		10.4%	31.2%	29.6%	34.1%	1.2%	
9	Durable Goods	3	197	123	193	0	516
		0.6%	38.2%	23.8%	37.4%	0.0%	
10	Telecommunications Equipment	22	188	45	37	2	294
		7.5%	63.9%	15.3%	12.6%	0.7%	
	Total	723	2 314	1 209	1 697	32	5 975
		12.1%	38.7%	20.2%	28.4%	0.5%	100.0%

Note:

1. Companies with employment size of 4 persons or less were excluded.
2. The number refers to the establishments.

2008 Retail Trade Manpower Survey

Table 12 : Needs for Pre-employment Training by Subject Area

Subject Areas		Very Important		Important		Not Very Important		Not necessary	
		Number	%	Number	%	Number	%	Number	%
1	Customer Service	1 283	42.2%	1 662	54.7%	71	2.3%	21	0.7%
2	Handling Complaints	694	22.9%	1 877	61.8%	401	13.2%	65	2.1%
3	Selling Skills	1 487	49.0%	1 513	49.8%	22	0.7%	15	0.5%
4	Interpersonal Skills	525	17.3%	2 110	69.5%	361	11.9%	41	1.4%
5	Putonghua	160	5.3%	1 853	61.0%	927	30.5%	97	3.2%
6	English	267	8.8%	1 854	61.0%	846	27.9%	70	2.3%
7	Others	46	85.2%	8	14.8%	0	0.0%	0	0.0%

Note:

1. Companies with employment size of 4 persons or less were excluded.

VOCATIONAL TRAINING COUNCIL

Terms of Reference of Training Boards

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 development of vocational education and training facilities to meet the assessed manpower demand.
4. To advise the Hong Kong Institute of Vocational Education (IVE) and training & development centres on the direction and strategic development of their programmes in the relevant disciplines.
5. To advise on the course planning, curriculum development and quality assurance systems of the IVE and training & development centres.
6. To prescribe job specifications for the principal jobs in the industry defining the skills, knowledge and training required.
7. To advise on training programmes for the principal jobs in the industry specifying the time a trainee needs to spend on each skill elements.
8. 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.
9. To advise on the conduct of skill competitions in key trades in the industry for the promotion of vocational education and training as well as participation in international competitions.
10. 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 vocational education and training in the industry.
11. To organize seminars/conferences/symposia on vocational education and training for the industry.
12. To advise on the publicity relating to the activities of the Training Board and relevant vocational education and training programmes of the VTC.
13. 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.
14. To undertake any other functions delegated by the Council in accordance with Section 7 of the Vocational Training Council Ordinance.

RETAIL TRADE TRAINING BOARD

Membership List

Chairman

Mr. JIM Tak-hing, Nicholas (nominated by a retail chain)

Members

Mr. CHU Chi-ming, Samson (nominated by a retail chain)

Mr. FUNG Kai-wah (nominated by a retail chain)

Mr. KOO Yin-lun, Antonio (nominated by a retail chain)

Dr. KWAN Mun-yee, Stella (nominated by a retail chain)

Mr. KWAN PAK-hoo* (nominated by the Hong Kong Retail Management Association)

Ms. KWOK Yee-ying+ (nominated by a retail chain)

Mr. YIP Cheuk-tak, Henry (nominated by the Hong Kong Retail Management Association)

Ms. YU Lai-yiu, Ruth (nominated by the Hong Kong Retail Management Association)

Mr. WONG Tsz-wan, Byron (nominated by the Hong Kong Department Stores and Commercial Staff General Union)

Mr. KWOK Kai-hing, Daniel (representing the Executive Director of the Vocational Training Council)

Secretary

Mr. LEUNG Kim-hang, Leslie (Vocational Training Council)

* Appointment term expired on 31st March 2009

+ Appointment term commenced on 1st April 2009

**WORKING GROUP ON THE
2008 RETAIL TRADE MANPOWER SURVEY**

Membership List

Convenor

Dr. KWAN Mun-ye, Stella (MTR Corporation Limited)

Members

Ms. CHOW Winnie (A.S. Waston Group)

Dr. TSO Geoffrey (City University of Hong Kong)

Mr. WAI Angus (Fairton International Group Ltd.)

Mr. WU Chris (Li & Fung (Retailing) Ltd.)

Mr. KWOK Kai-hing, Daniel (Vocational Training Council)

In Attendance

Mr. LAM Wai-lim, William (Census and Statistics Department)

Secretary

Mr. LEUNG Kim-hang, Leslie (Vocational Training Council)

**IN-DEPTH INTERVIEWS ON THE
2008 RETAIL TRADE MANPOWER SURVEY**

List of Participants

Ms. HO Maisy	(Toys Li Fung (Hong Kong) Ltd.)
Ms. LIU Clara	(Wing On Department Stores (HK) Ltd.)
Ms. POON Carol	(Circle K Convenience Stores (HK) Ltd.)
Ms. WONG Shirley	(Luk Fook Group)
Ms. YEUNG Ivy	(Esprit Retail (HK) Ltd.)
Mr. YUEN Simon	(Imperial Bird's Nest International Co.)

Secretary

Mr. LEUNG Kim-hang, Leslie	(Vocational Training Council)
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Vocational Training Council 職業訓練局

Headquarters Division 2 總辦事處二科
 20F, Skyline Tower, 39 Wang Kwong Road, Kowloon Bay, Kowloon, Hong Kong
 香港九龍九龍灣宏光道39號宏天廣場20樓
 www.vtc.edu.hk

Telephone No 電話

Facsimile No 傳真 (852) 2574 3759

Our Reference 本局檔號 () in RT/4/2 (2008)

Your Reference 來函檔號



8 October 2008

Dear Sir/Madam,

2008 Manpower Survey of the Retail Trade

On behalf of the Vocational Training Council, I am writing to solicit your kind cooperation in the 2008 Manpower Survey to be conducted by the Retail Trade Training Board. The Retail Trade Training Board is appointed by the Chief Executive of the Government of the Hong Kong Special Administrative Region to be responsible for matters pertaining to manpower training in the retail trade.

The purpose of the survey is to assess the latest manpower situation and training needs so as to enable the Training Board to formulate appropriate recommendations on manpower training for the retail industry. Information on salary will not be collected in this survey. The survey will be conducted from 13 October to 15 November 2008. Your support in supplying the information will be much appreciated.

---- I enclose the following documents in both English and Chinese for your completion and reference:

1. The questionnaire (Appendix A),
2. Explanatory notes (Appendix B), and
3. Descriptions of principal jobs (Appendix C)

During the survey period, an officer from the Census and Statistics Department will contact your office. The officer will answer any queries you may have, and collect the completed questionnaire.

I wish to assure you that the information collected will be handled in strict confidence and will be published only in the form of statistical summaries without reference to individual companies.

All information and findings reported in the survey reports is of great relevance for future growth and development in your company. It would be most appreciated if you would take a few minutes in completing the questionnaire.

For details of past manpower survey reports of the Retail Trade, please visit our website: <http://rttb.vtc.edu.hk>.

Should you have any queries regarding the survey, please contact the Manpower Statistics Section of the Census and Statistics Department at 2116 8375.

Thank you for your cooperation.

Yours faithfully,

A handwritten signature in black ink, appearing to read 'T H Jim', with a long horizontal flourish extending to the left.

(T H JIM)
Chairman
Retail Trade Training Board

CONFIDENTIAL
WHEN DATA ENTERED

填入數據後即成
機密文件

Appendix A

附錄A

(For companies with employment size of 4 persons or less)
公司僱員人數四人或以下

VOCATIONAL TRAINING COUNCIL

職業訓練局

2008 MANPOWER SURVEY OF THE RETAIL TRADE

2008 年零售業人力調查

QUESTIONNAIRE

調查表

PLEASE READ THE EXPLANATORY NOTES BEFORE COMPLETING THIS QUESTIONNAIRE

填表前請詳閱附註

For official use only: 此欄毋須填寫	Rec. Type	Survey Code	Industry Code	Establishment No.	Enumerator's No.	Editor's No.	Check Digit	No. of Employees Covered by the Questionnaire
	1	3 0	4 5 6 7 8 9	10 11 12 13 14 15	16 17	18 19	20 21 22	23 24 25 26 27

NAME OF COMPANY: _____
公司名稱

ADDRESS: _____
地址

TYPE OF PRODUCTS / SERVICES: _____
產品/服務

TOTAL NUMBER OF PERSONS ENGAGED: _____
僱員總人數

NAME OF PERSON TO CONTACT: _____
聯絡人姓名 28 47

POSITION: _____
職位

TEL. NO.: _____
電話 48 55 56 63

FAX NO.: _____
圖文傳真

E-MAIL: _____
電郵 64 98

(A) Job 工作			(B) Number Employed at Date of Survey 調查時的 僱員人數	(C) No. of Vacancies at Date of Survey 調查時的 空缺額	(D) Forecast of No. Employed 12 Months from Now 預計12個月 後僱員人數	(E) Preferred Level of Education 僱員宜有 教育程度	(F) Preferred Relevant Years of Experience 僱員宜有的 相關年資	Codes 編號說明
Title 職稱 (See Appendix C) (參閱附錄C)	Rec. Type	Job Code 職務編號	11 - 14	15 - 17	18 - 21	22	23	<p><u>Column (E) (E欄)</u></p> <p>Enter in Column (E) the preferred level of education for employee according to the following codes: 請將僱員宜有的教育程度，按下列編號填入「E」欄內：</p> <p><u>Codes Preferred Level of Education</u> 編號 宜有教育程度</p> <p>1 University Degree or above 大學學位或以上</p> <p>2 Associate Degree/Professional Diploma/ Higher Diploma/Higher Certificate or equivalent 副學士學位／專業文憑／高級文憑／高級證書或同等學歷</p> <p>3 Diploma/Certificate or equivalent 文憑／證書或同等學歷</p> <p>4 Matriculation 預科</p> <p>5 Secondary 5 中五</p> <p>6 Secondary 3 中三</p> <p>7 Others 其他</p> <p><u>Column (F) (F欄)</u></p> <p>Enter in Column (F) the preferred relevant years of experience for employee according to the following codes: 請將僱員宜有的相關年資，按下列編號填入「F」欄內：</p> <p><u>Codes Preferred Relevant Years of Experience</u> 編號 宜有的相關年資</p> <p>1 10 years or more 十年或以上</p> <p>2 6 years to less than 10 years 六年至十年以下</p> <p>3 3 years to less than 6 years 三年至六年以下</p> <p>4 1 year to less than 3 years 一年至三年以下</p> <p>5 Less than 1 year 一年以下</p>
		8 - 10						
1.	2							
2.	2							
3.	2							
4.	2							
5.	2							
6.	2							
7.	2							
8.	2							
9.	2							
10.	2							

Please tick in the appropriate box if your company wants a complimentary copy of the 2008 Manpower Survey Report
如貴公司欲收到二〇〇八年人力調查報告贈閱版，請於方格內加上 "✓" 號。

Booklet 書冊

347

CD-ROM

348

End of Questionnaire 全卷完

Thank you for your Co-operation 多謝合作

The completed questionnaire will be collected by an officer from the Census and Statistics Department.
政府統計處會派員收回填妥的調查表。

CONFIDENTIAL

WHEN DATA ENTERED

填入數據後即成

機密文件

Appendix A

附錄A

(For companies with employment size of 5 persons or above)

公司僱員人數五人或以上

VOCATIONAL TRAINING COUNCIL

職業訓練局

2008 MANPOWER SURVEY OF THE RETAIL TRADE

2008 年零售業人力調查

QUESTIONNAIRE

調查表

PLEASE READ THE EXPLANATORY NOTES BEFORE COMPLETING THIS QUESTIONNAIRE

填表前請詳閱附註

For official use only: 此欄毋須填寫	Rec. Type	Survey Code	Industry Code	Establishment No.	Enumerator's No.	Editor's No.	Check Digit	No. of Employees Covered by the Questionnaire
	1	3 0	4 5 6 7 8 9	10 11 12 13 14 15	16 17	18 19	20 21 22	23 24 25 26 27

NAME OF COMPANY: _____

公司名稱

ADDRESS: _____

地址

TYPE OF PRODUCTS / SERVICES: _____

產品/服務

TOTAL NUMBER OF PERSONS ENGAGED: _____

僱員總人數

NAME OF PERSON TO CONTACT: _____

聯絡人姓名

28

47

POSITION: _____

職位

TEL. NO.: _____ - _____

電話

48

55

56

63

FAX NO.: _____

圖文傳真

E-MAIL: _____

電郵

64

98

Part I
第一部份

(A) Job 工作			(B) Number Employed at Date of Survey 調查時的僱員人數	(C) No. of Vacancies at Date of Survey 調查時的空缺額	(D) Forecast of No. Employed 12 Months from Now 預計12個月後僱員人數	(E) Preferred Level of Education 僱員宜有教育程度	(F) Preferred Relevant Years of Experience 僱員宜有的相關年資	Codes 編號說明
Title 職稱 (See Appendix C) (參閱附錄C)	Rec. Type	Job Code 職務編號	11 - 14	15 - 17	18 - 21	22	23	Column (E) (E欄)
		8 - 10						Enter in Column (E) the preferred level of education for employee according to the following codes: 請將僱員宜有的教育程度，按下列編號填入「E」欄內：
	2							Codes 編號
	2							Preferred Level of Education 宜有教育程度
	2							1 University Degree or above 大學學位或以上
	2							2 Associate Degree/ Professional Diploma/ Higher Diploma/ Higher Certificate or equivalent 副學士學位/專業文憑/ 高級文憑/高級證書 或同等學歷
	2							3 Diploma/Certificate or equivalent 文憑/證書或同等學歷
	2							4 Matriculation 預科
	2							5 Secondary 5 中五
	2							6 Secondary 3 中三
	2							7 Others 其他
	2							Column (F) (F欄)
	2							Enter in Column (F) the preferred relevant years of experience for employee according to the following codes: 請將僱員宜有的相關年資，按下列編號填入「F」欄內：
	2							Codes 編號
	2							Preferred Relevant Years of Experience 宜有的相關年資
	2							1 10 years or more 十年或以上
	2							2 6 years to less than 10 years 六年至十年以下
	2							3 3 years to less than 6 years 三年至六年以下
	2							4 1 year to less than 3 years 一年至三年以下
	2							5 Less than 1 year 一年以下
	2							
	2							
	2							
	2							
	2							
	2							
	2							
	2							
	2							
	2							
	2							

Note: If additional lines are necessary, please tick and enter on supplementary sheet(s).
附註：如此頁填滿，請先將 (✓) 號填入此 內，然後在附頁繼續填寫。

Part II
第二部份

For Full-Time Employees
全職僱員

1. Number of full-time employees in October 2007 (12 months ago).
2007年10月時 (12個月前) 的全職僱員人數。

- | | | |
|-----|--|--|
| (a) | Managerial
經理級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
8 |
| (b) | Supervisory
主任級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
12 |
| (c) | Sales Staff
售貨員 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
16 |
| (d) | Other Operative & Clerical Support
其他技術人員及文員級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
20 |

2. Number of full-time employees left in the past 12 months.
過去12個月內離職的全職僱員人數。

- | | | |
|-----|--|--|
| (a) | Managerial
經理級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
25 |
| (b) | Supervisory
主任級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
29 |
| (c) | Sales Staff
售貨員 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
33 |
| (d) | Other Operative & Clerical Support
其他技術人員及文員級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
37 |

For Part-time Sales/Service Staff
兼職售貨員／服務員

3. (a) Number of Part-time Sales/Service Staff in October 2007 (12 months ago).
2007年10月時 (12個月前) 的兼職售貨員／服務員人數。

42

46

(b) Number of Part-time Sales/Service Staff left in the past 12 months.
過去12個月內離職的兼職售貨員／服務員人數。

47

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此欄毋須填寫

Est. No. _____

ER No. _____

24

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Training

訓練

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此欄毋須填寫

4. How many training (either internal or external*) places have you sponsored or provided to full-time employees on the following subject areas in the **past 12 months**?
過去12個月，貴機構向全職僱員提供下列項目的培訓資助或訓練（包括內部及外間*）的名額有多少？

	Full-time Managerial and Supervisory Staff 全職經理及主任級僱員	Full-time Sales, Operative and Clerical Support Staff 全職售貨員、 技術人員及文員
(a) Managerial/Supervisory Skills/ Business Management 管理／督導技巧／業務管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 52	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 55
(b) Customer Service 客戶服務	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 59	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 62
(c) Selling Skills 銷售技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 66	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 69
(d) Handling Complaints 處理投訴	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 73	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 76
(e) Interpersonal Skills 人際關係技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 80	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 83
(f) Store Operations 店舖營運	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 87	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 90
(g) Logistics/Supply Chain Management 物流／供應鏈管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 94	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 97
(h) IT and Applications 資訊科技及應用	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 101	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 104
(i) Putonghua 普通話	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 108	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 111
(j) English 英語	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 115	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 118
Others (please specify) : 其他（請說明）	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 122	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 125
_____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 129	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 132
_____		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 136 137

Note : * Internal training refers to an in-house training offered by the company.

附註 : * 內部訓練指由公司內部提供之訓練。

* External training refers to a training offered by an external training provider.

* 外間訓練指由公司以外的培訓機構提供之訓練。

5. How many training (either internal or external) places will you sponsor or provide to full-time employee on the following subject areas in the next 12 months?
 未來12個月，貴機構會為全職僱員提供下列項目的培訓資助或訓練（包括內部及外間）的名額有多少？

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 此欄毋須填寫

	Full-time Managerial and Supervisory Staff 全職經理及主任級僱員	Full-time Sales, Operative and Clerical Support Staff 全職售貨員、 技術人員及文員
(a) Managerial/Supervisory Skills/ Business Management 管理／督導技巧／業務管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 138	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 141
(b) Customer Service 客戶服務	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 145	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 148
(c) Selling Skills 銷售技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 152	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 155
(d) Handling Complaints 處理投訴	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 159	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 162
(e) Interpersonal Skills 人際關係技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 166	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 169
(f) Store Operations 店舖營運	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 173	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 176
(g) Logistics/Supply Chain Management 物流／供應鏈管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 180	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 183
(h) IT and Applications 資訊科技及應用	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 187	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 190
(i) Putonghua 普通話	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 194	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 197
(j) English 英語	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 201	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 204
Others (please specify): 其他（請說明）	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 208	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 211
_____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 215	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 218

222

223

6. For each of the subject area, please indicate the percentage of internal and external training to be sponsored/provided in the next 12 months.
就以下各項訓練範疇，請填寫 貴機構將於未來12個月資助／提供的內部及外間培訓的百分比。

	Internal 內部培訓 (%)	External 外間培訓 (%)	
(a) Managerial/Supervisory Skills/ Business Management 管理／督導技巧／業務管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 224	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 227	<input type="text"/> 230
(b) Customer Service 客戶服務	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 231	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 234	<input type="text"/> 237
(c) Selling Skills 銷售技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 238	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 241	<input type="text"/> 244
(d) Handling Complaints 處理投訴	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 245	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 248	<input type="text"/> 251
(e) Interpersonal Skills 人際關係技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 252	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 255	<input type="text"/> 258
(f) Store Operations 店舖營運	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 259	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 262	<input type="text"/> 265
(g) Logistics/Supply Chain Management 物流／供應鏈管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 266	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 269	<input type="text"/> 272
(h) IT and Applications 資訊科技及應用	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 273	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 276	<input type="text"/> 279
(i) Putonghua 普通話	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 280	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 283	<input type="text"/> 286
(j) English 英語	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 287	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 290	<input type="text"/> 293
Others (please specify): 其他（請說明）			
_____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 294	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 297	<input type="text"/> 300
_____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 301	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 304	<input type="text"/> 307

7. Do your company sponsor or provide training to Part-time Sales/Service Staff
貴機構有沒有為兼職售貨員／服務員資助或提供培訓？

Yes
有

No
沒有

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8. Pre-employment training refers to training provided to people before they enter the workforce or before they are employed in a particular industry. What is your view on pre-employment training for front-line sales persons
「職前培訓」指為投身某個行業工作的人士，提供入職前訓練。你對前線銷售人員的職前培訓有何意見？

309

Pre-requisite (please go to Q. 9)
必須 (請答第9題)

310

Preferred (please go to Q. 9)
宜有 (請答第9題)

311

No comment
(End of Questionnaire. Thank you)
無意見 (問卷完，多謝合作)

312

Not necessary
(End of Questionnaire. Thank you)
無需要 (問卷完，多謝合作)

313

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9. Which types of training you think a front-line sales person needs to acquire before employment

(Please tick the appropriate box of level of importance)

你認為前線銷售人員入職前須接受哪些訓練？(請按重要性✓合適方格)

	Very Important 十分重要	Important 重要	Not Very Important 不太重要	Not Necessary 無需要
(a) Customer Service 客戶服務	<input type="checkbox"/> 314	<input type="checkbox"/> 315	<input type="checkbox"/> 316	<input type="checkbox"/> 317
(b) Handling Complaints 處理投訴	<input type="checkbox"/> 318	<input type="checkbox"/> 319	<input type="checkbox"/> 320	<input type="checkbox"/> 321
(c) Selling Skills 銷售技巧	<input type="checkbox"/> 322	<input type="checkbox"/> 323	<input type="checkbox"/> 324	<input type="checkbox"/> 325
(d) Interpersonal Skills/Team Work 人際關係技巧/團隊工作	<input type="checkbox"/> 326	<input type="checkbox"/> 327	<input type="checkbox"/> 328	<input type="checkbox"/> 329
(e) Putonghua 普通話	<input type="checkbox"/> 330	<input type="checkbox"/> 331	<input type="checkbox"/> 332	<input type="checkbox"/> 333
(f) English 英語	<input type="checkbox"/> 334	<input type="checkbox"/> 335	<input type="checkbox"/> 336	<input type="checkbox"/> 337
(g) Others (please specify) 其他 (請說明)				
_____	<input type="checkbox"/> 338	<input type="checkbox"/> 339	<input type="checkbox"/> 340	<input type="checkbox"/> 341
_____	<input type="checkbox"/> 342	<input type="checkbox"/> 343	<input type="checkbox"/> 344	<input type="checkbox"/> 345

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Please tick in the appropriate box if your company wants a complimentary copy of the 2008 Manpower Survey Report
如貴公司欲收到二〇〇八年人力調查報告贈閱版，請於方格內加上 "✓" 號。

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Booklet 書冊

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CD-ROM

End of Questionnaire

Thank you for your Co-operation

全卷完，多謝合作

The completed questionnaire will be collected by an officer from the Census and Statistics Department.
政府統計處會派員收回填妥的調查表。

2008 Manpower Survey of the Retail Trade

Explanatory Notes

1. Please complete the columns ('A' to 'F') of the questionnaire and insert a zero (0) for any column not applicable to your company.

2. **Column 'A' - Job Titles**

(a) Please refer to Appendix C "Job Titles and Brief Job Descriptions of Principal Jobs". Please note that some of the job titles may not be the same as those used in your company, but if the jobs have similar or related functions, please treat them as the same and supply the required information in the questionnaire.

(b) Please classify an employee according to his/her major duty irrespective of any additional secondary duties he/she may be required to perform.

(c) For other managers, other supervisors and other clerks/supportive staff whose duties require retail training, please specify their titles and fill in 'B' to 'D' accordingly.

3. **Column 'B' - Number Employed at Date of Survey**

Please enter in this column the number employed for each job title at date of survey. These include proprietors and partners working for your company.

4. **Column 'C' - Number of Vacancies at Date of Survey**

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

5. **Column 'D' - Forecast of Number Employed 12 Months from Now**

Please enter in this column the total number of employees you will be employing 12 months from now. If an expansion/contraction is expected, the number given could be more/less than that in column 'B'.

6. **Column 'E' - Preferred Level of Education**

Please enter in this column the appropriate code for the preferred level of education which your company requires an employee in a particular position to have.

<u>Level of Education</u>	<u>Code</u>
University Degree or above	1
Associate Degree/Professional Diploma/Higher Diploma/ Higher Certificate or equivalent	2
Diploma/Certificate or equivalent	3
Matriculation	4
Secondary 5	5
Secondary 3	6
Others	7

7. **Column 'F' - Preferred Relevant Years of Experience**

Please indicate the years of relevant experience which your company requires an employee in a particular position to have.

<u>Relevant Years of Experience</u>	<u>Code</u>
10 years or more	1
6 years -less than 10 years	2
3 years - less than 6 years	3
1 year - less than 3 years	4
Less than 1 year	5

Note : The information received will be treated in strict confidence and will be published only in the form of statistical summaries without reference to any individual company.

2008 Manpower Survey of the Retail Trade

Job Titles and Brief Job Descriptions of Principal Jobs

Some of the job titles may not be the same as those used in your company. If the jobs have similar or related functions, please treat them as the same and supply the required information in the questionnaire.

Code No.	Job Title	Brief Job Description
MANAGERIAL LEVEL (including Senior and Assistant Managers)		
111	General Manager	Assumes total responsibility for retail operations, merchandising, sales and marketing functions.
112	Operations/Retail Manager	Takes charge of the overall operations and management of stores/outlets/retail chain.
113	District/Area Manager	Takes charge of the operations and management of a number of stores/outlets usually within a geographical area.
114	Store Manager	Takes charge of the operations and management of a store/outlet.
115	Marketing Manager	Plans, directs and manages marketing functions including advertising, public relations and corporate communications.
116	Sales Manager	Plans, directs and manages sales-related activities aiming at maximizing sales. Directly contacts clients to promote sales.
117	Customer Services Manager	Plans, organizes, directs and controls activities relating to customer services. Contacts customers, liaises with internal departments to ensure provision of high standard customer services.

Code No.	Job Title	Brief Job Description
118	Head of Merchandising/ Buying Manager	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.
119	Logistics/Distribution/ Warehouse Manager	Plans, directs and manages logistics/distribution/warehousing activities to ensure smooth operation of merchandise flow.
120	Training Manager	Plans, directs and manages training functions. Formulates training plans with reference to manpower plan, identifies training needs, delivers training programmes and monitors training effectiveness.
198	Owner/Sole Proprietor/ Working Partner	Owens and runs the business.
199	Other Managers (please specify titles)	
SUPERVISORY LEVEL (including Senior and Assistant Supervisors)		
211	Store Supervisor	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.
212	Visual Merchandising Supervisor	Supervises and designs visual merchandise in shop window, showcase and inside store. Plans and implements merchandise display in store.
213	Logistics/Distribution/ Warehouse Supervisor	Supervises logistics, distribution and warehousing of merchandise to achieve planned levels of services to users and customers.
214	Public Relations Officer/ Advertising Officer	Plans and implements marketing programmes to promote sale of merchandise and to promote a company's image. Keeps close contact with the mass media and advertising agents.

Code No.	Job Title	Brief Job Description
215	Customer Services Supervisor	Supervises and implements activities relating to customer services. Provides services directly to customers.
216	Merchandiser/Buyer	Responsible for merchandising or buying functions. Liaises and negotiates with suppliers and appropriate departments to ensure continuity and quality of merchandise supply.
217	Training Officer	Implements training plans, conducts training programmes, maintains training records, and arranges for training administration.
299	Other Supervisors (please specify titles)	
OPERATIVE/CLERICAL SUPPORT LEVEL		
311	Senior Sales Staff	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.)
312	Junior Sales Staff	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.)
313	Stock/Purchasing Clerk	Receives, stores and distributes supplies and commodities. Prepares purchase orders and maintains records of items purchased. Compiles and compares stock records to prepare purchase requisitions.
314	Stock Assistant	Delivers and receives merchandise, arranges storage, fills up shelves in warehouse and / or in stores.
315	Order Assistant (Online services)	Receives online orders, checks stocks, arranges distribution of commodities, and confirms the delivery of commodities to destinations.

Code No.	Job Title	Brief Job Description
399	Other Clerks/Supportive Staff (please specify titles)	
411	Part Time Sales/Service Staff	Employed on part time basis. Sells merchandise, provides customer service, and / or operates cash register in retail store.

Manpower Projection for 2009-2011 Labour Market Analysis Approach

Methodology

1. The Labour Market Analysis (LMA) approach first examines a group of key statistical data collected by a reliable and independent authority that reflect important changes in the local economy, demography and labour market. It then selects some of the data as independent variables and attempts to build a statistical model that can be used to project manpower in the economic sector under study. In other words, the model makes use of some relevant and reliable economic indicators to project manpower demand in the short and medium term.
2. The LMA approach has been successfully applied to manpower projection for Retail Trade Industry in 2002, 2004 and 2006.
3. The building of a statistical model comprises two main steps. The first step is called 'Diagnostic' because two sets of statistical data are tested to select independent variables as determinants. Set I comprises 9 core statistics in the National Accounts (e.g. Gross Domestic Products (GDP) and its components) of Hong Kong. These statistics provide information about our key economic activities. Set II comprises 42 economic indicators with more disaggregate information about various economic sectors. Such information includes consumption, investment, trade, tourism, property and related activities, and information about the labour market, etc. From these two data sets, some determinants can be found. To minimize Types I & II and other errors, these determinants are statistically tested for multi-collinearity before they are grouped into principal components (PCs). The second step of statistical modeling is called "Prognostic" because PCs are used to build the statistical model for manpower projection.

Manpower Projection for Retail Sector

4. For the retail sector, 7 determinants below have been identified and grouped into PCs.
 - 1) Total loans and advances [LAI]
 - 2) Composite consumer price index [CCPI]
 - 3) Property price index (private domestic) [PPI]
 - 4) Number of visitor arrivals [VAI]
 - 5) Export of services [XSER]
 - 6) Export of goods in quantum index [XGDS]
 - 7) Import of goods in quantum index [MGDS]

5. Due to insufficient manpower data for the second “Prognostic” step, a method based on economic theories applied to the Input-Output (I/O) model will be adopted. Input-output model attempts to quantify the interdependency of the various sectors in an economy. In this I/O table, information on the economy will be presented with all outputs in either one of the two types: production (i.e. agriculture, manufacturing, services industries) or final demand (i.e. consumption or investment). In the I/O model, an industry uses certain primary inputs (e.g. labour, capital equipment) to produce outputs. The industry is assumed to have fixed production coefficients (i.e. constant return to scale) over the short time span under consideration (say six months to under three years). To generate the employment effect, it is necessary to estimate a set of labour input requirements by determining the ratio of the production (or final demand) to the number of employees. The ratio, called employment coefficient, will represent the number of employees needed to produce a single unit of production (of final demand).

6. In retail industry, the retail sales in volume index is defined as the output of the industry. Principal Component Regression is then applied to forecast retail sales in volume index. Multiplying the employment coefficient to the projected index will give projected manpower demand.

7. Based on the statistical model with LMA approach, the manpower demand for retail industry in 2009-2011 is projected as below:

Year	Actual Manpower	Projected Manpower
2008	236,371	
2009		215,560 (-8.8%*)
2010		220,526 (2.3%**)
2011		221,867 (0.6%**)
* As percentage change vs actual manpower in 2008.		
** As percentage change vs projected manpower in previous year.		

第一章

報告摘要

人力調查

1.1 零售業訓練委員會每兩年進行一次人力調查，以評估業內人力情況，瞭解人力需求及培訓需要。

1.2 實地調查工作於 2008 年 10 月進行，調查數據以 2008 年 10 月 13 日為參考日。調查採用分層隨機抽樣法，從零售業 36 155* 間登記商號中，選出 674 間作調查對象。

1.3 是次調查新增「訂單助理（網上服務）」一職，工作說明見下表。

文員／技術人員級		
編號	職稱	工作說明
315	訂單助理（網上服務）	網上接收訂單、查核存貨量、安排運輸，及確保貨物送達目的地。

1.4 為提高有效回應率，僱員人數四人或以下的公司只需填寫調查表第一部分（基本資料），有關培訓的問題則無須回答。本會已調整 2006 年調查所得有關訓練需求的數據，以便能與 2008 年數據作直接比較。在詮釋與比較這些數據時，請注意有關轉變。

1.5 是次調查的整體有效回應率為 95.1%，較 2006 年 93.5%略高。

目的

1.6 調查旨在從宏觀角度研究零售業的中、短期人力需求及培訓需要，以掌握業界的大致趨勢，有關趨勢只反映零售業的大體發展方向，而調查結果對不同零售業類別或公司的適用程度不盡相同。

附註：

* 剔除機構單位記錄庫中不活躍商號後的登記公司數目有 36 155 間。2008 年零售業公司的總數為 42 695 間。

限制

1.7 自調查進行至報告供發表，期間金融海嘯對本港經濟，尤其是零售業構成嚴重損害，令調查結果與實際情況可能不盡一致。

1.8 礙於資源有限，是次只能以統計方法對業內公司進行抽樣調查，所衍生的統計誤差難以避免，可能影響調查結果的詮釋。

業務前景

1.9 全球金融危機的陰霾自 2008 年 8 月起縈繞不散，在最後一季影響更進一步深化。根據政府統計處發表的經濟及社會數據，2008 年的按年本地生產總值（GDP）為 3.9%，較 2007 年下跌 5.6%，而 2008 年最後一季的 GDP，亦較 2007 年同期下跌 14.5%，有關數據自 2008 年下半年開始出現明顯下滑。

1.10 2008 年後期，通脹壓力明顯放緩，預期通脹率將於 2009 年進一步下降，2009 年全年綜合消費物價指數(CPI)估計上升 1.5%，較 2008 年的增幅減少 5.6%。

1.11 未經季節性調整的失業率持續上升，由 2008 年首季的 3.1% 上升至第二季的 3.4%，更於同年最後一季升至 3.8%，預期將於 2009 年首半年飆升至 7.3%，是 2003 年以來的新高。預期由於不明朗因素增加、住戶財富減少及失業率上升，2009 年的營業額及銷售量將下降。

1.12 由於經濟指標急降，預期 2009 年的經濟前景極不明朗。零售業的營商環境或因此不穩定。失業率上升及收入下降將繼續打擊消費者情緒。有鑑於此，預期 2009 年全年的零售銷售量將下跌 8.0%。

1.13 人類豬型流感爆發帶來的不穩定因素，令本已蕭條的全球經濟雪上加霜。雖然人類豬型流感的疫情或許未如 2003 年的沙士嚴重，但無可避免會打擊旅遊意欲，進而削弱旅遊及零售業。

1.14 然而，隨著內地與香港進一步融合，更緊密經貿關係安排(CEPA)的範圍擴大，中央政府的支持措施，以及香港加強與廣東及深圳的合作，預期將能帶動經濟在 2009 年最後一季反彈，惠及零售業。

1.15 更多內地旅客透過「自由行」來港旅遊，與旅遊業相關的消費，由 2007 年的港幣 1405.17 億元，上升至 2008 年的 1486 億元，內地旅客人次佔該年全年來港旅客量約 55%，超過 1,660 萬人次，較 2007 年上升 4.7%。

1.16 內地旅客人數上升，必然刺激本港的零售業務。因此，中央政府宣布兩項措施，利便內地居民到本港旅遊，包括深圳的非廣東籍居民可於深圳申請自遊行簽證，以及容許深圳永久居民申請一年多次進出香港的自遊行簽證。

1.17 此外，特區政府亦於 2009 年推出兩項措施，放寬台灣旅客的留港限制，旅客可於 30 天內申請兩個網上快證，延長逗留期限，而多次入境簽證持有人亦可在香港逗留最多 30 天。預期有關措施可以進一步增加台灣旅客對零售業的貢獻。

1.18 鑑於中央政府決心「保八」，即使消費增長放緩，亦會透過增加政府開支及各項措施以維持經濟動力。故此儘管經濟增長放緩，但在所有重要的消費品市場中，內地市場的前景依然最為樂觀。預期中國的內需市場將繼續保持強勁。因此，部分富裕的內地消費者或傾向在內地及香港購買中高檔產品。

1.19 政府已公布 14 項措施以推動香港經濟，在特區政府與香港所有市民共同努力下，香港定必能安然渡過危機，譜寫精彩新一頁。

1.20 由於全球經濟環境存在多個不明朗因素，上述前景展望或與 2009 年的實際發展不符。總括而言，人力調查工作小組與接受深入訪問的人士，均對 2009 年的營商環境持審慎態度。

2008 年的人力情況

1.21 調查期間，零售業共有 231 229 名僱員(2006 年：218 915 人)，較上次調查上升 5.6%。其中，零售業主要職能人員有 205 806 人(89%) (2006 年：192 425 人)，而非零售業主要職能人員有 25 423 人(11%) (2006 年：26 490 人)。

1.22 「零售業主要職能人員」指從事零售業主要職務的僱員(見附錄五)，本報告會就業界對此等人員的需求進行分析。另一方面，「非零售業主要職能人員」指從事一般職務的工作，例如財務／會計、人力資源、資訊科技、行政及其他支援工作。

1.23 在 2008 年 231 229 名總人力中，8 730 人(3.8%)為經理級、33 317 人(14.4%)為主任級、145 264 人(62.8%)為文員／技術人員級(包括兼職售貨員)、18 495 人(8%)為東主／獨資經營者，25 423 人(11%)為非零售業主要職能人員。2006 與 2008 年人力結構的比較如下：

職級	2006	2008
東主／獨資經營者	13.5%	8%
經理級	3.2%	3.8%
主任級	9.1%	14.4%
文員／技術人員級	62.1%	62.8%
非零售業主要職能人員	12.1%	11%
總計	100.0%	100.0%

1.24 在 5 142 個職位空缺總數中，178 個為經理級、241 個是主任級、另包括 4 594 個文員／技術人員級和 129 個非零售業主要職能人員。連空缺數目在內，於參考日的總人力需求為 236 371 人。

僱主的 2009 年人力預測

1.25 僱主預期，在調查參考日後未來 12 個月，人力需求將為 237 874 人，整體人數較 2008 年增加 1 503 人（0.6%）。

1.26 預測人力需求增長最大的類別如下：

- 一、 電訊設備及電器產品（+2.5%）
- 二、 消費品（+1.5%）
- 三、 百貨公司（+1.3%）

1.27 另一方面，預期人力需求會下跌的類別如下：

- 一、 耐用品（-0.1%）
- 二、 超級市場（-0.1%）
- 三、 燃料及運輸設備（-0.1%）

1.28 按職級劃分，預測經理級會增加 31 人（0.3%）、主任級 186 人（0.6%）、文員／技術人員級 1 545 人（1%）。

採用人力市場分析法作人力預測 (2009 至 2011 年)

1.29 一如 2006 年，本會仍採用人力市場分析法以推算未來三年零售業的人力需求。人力市場分析法從 42 項經濟指標中挑選七項主要組成部分，通過統計測試，得出推算結果。人力市場分析法及主要假設見第二章 2.24 至 2.25 段。推算 2009 至 2011 年人力需求如下：

年份	實際人力情況	僱主預測	人力市場分析法推算的人力需求
2008	236 371	-	-
2009	-	237 874 (+0.6%*)	215 560 (-8.8%*)
2010	-	-	220 526 (+2.3%**)
2011	-	-	221 867 (+0.6%**)

1.30 由人力市場分析法(LMA)推算出的 2009 年人力需求下降 8.8%，與僱主預測的 0.6%增長相比，兩者無論在幅度或方向上均相距甚遠。出現差異的原因，或許是由於調查於 2008 年 10 月進行，而 LMA 則把反映 2009 年首季金融海嘯影響的最新經濟指標亦計算在內。

訓練需求[#]

1.31 由於預期金融危機出現，大部分僱主認為提升僱員的技能有迫切需要，以應付繁重的零售業務，以及保持競爭力。

1.32 僱主於 2009 年預期提供或資助 119 950 個訓練名額，相對於 2008 年的 124 901 個名額，微跌約 4%。鑑於 2009 年的經濟不明朗，有關跌幅委實微不足道，顯示僱主繼續關注員工培訓及發展。

1.33 預期 2009 年由公司內部及外界提供的訓練名額比例如下：

科目	公司內部提供的訓練名額	外界提供的訓練名額
管理培訓	69%	31%
行業特定培訓	82%	18%
語文	47%	53%
其他	83%	17%

附註：

* 與 2008 年實際人力數字比較的變動百分率。

** 與前一年推算人力數字比較的變動百分率。

所有有關訓練需求的數字，均需扣除僱員人數四人或以下的公司。

1.34 2008 年調查顯示，訓練需求最殷切的三個範疇分別為：

- 一、 客戶服務
- 二、 銷售技巧
- 三、 投訴處理

1.35 2008 年調查顯示，訓練需求增長最大的三個範疇分別為：

- 一、 資訊科技及應用
- 二、 英語
- 三、 物流／供應鏈管理

1.36 為改善整體僱員水平，超過 50.8%的僱主表示前線售貨員的職前培訓屬「必須」或「宜有」，較 2006 年 47.5%有所上升。然而如單看「必須」一項，其百分比則從 2006 年 4.8%上升至 12.1%；「宜有」水平則從 2006 年的 42.7%，下降至 2008 年的 38.7%。這個差別顯示，僱主頗為傾向聘請已接受職前培訓的僱員。

資料來源：

- 1.《恒生經濟月報》
- 2.中國經濟脈搏(China Economic Monitor)
- 3.香港金融管理局
- 4.政府統計處
- 5.香港旅遊發展局
- 6.香港貿易發展局
- 7.2008 年經濟概況及 2009 年展望

第二章

調查結果

甲. 2008年人力情況

人力總數

2.1 根據調查結果，於 2008 年 10 月調查參考日零售業共僱用 231 229 人，其中 205 806 人 (89%) 為零售業主要職能人員，其餘 25 423 人 (11%) 為非零售業主要職能人員，與 2006 年之相關數據 88% 及 12% 相若。

2.2 附錄五載列按職級劃分的主要職務名稱及工作說明。是次調查分析包括零售業主要職能人員及非零售業主要職能人員，以便綜合瞭解業內人力情況全貌。「人力需求」是指上述兩類職能人員在調查期間僱員人數及空缺數目的總和。詳細人力統計數字見第五章表一至表五。

按公司規模劃分的人力分布情況

2.3 調查將零售業分為十個類別，以下為按公司規模劃分的人力分布情況：

類別	公司僱員 四人或以下	公司僱員 五人或以上	總計
1. 食品、酒類飲品及煙草	7 798	1 532	9 330
2. 超級市場	50	67	117
3. 燃料及運輸設備	701	246	947
4. 衣物、鞋類及有關物品	7 110	1 144	8 254
5. 消費品	10 024	1 344	11 368
6. 百貨公司	0	28	28
7. 珠寶首飾	1 044	304	1 348
8. 藥物及化妝品	757	500	1 257
9. 耐用品	1 255	516	1 771
10. 電訊設備及電器產品	1 441	294	1 735
總計	30 180 (83.5%)	5 975 (16.5%)	36 155* (100%)

附註：

* 剔除機構單位記錄庫中不活躍商號後的登記公司數目有 36 155 間。2008 年零售業公司的總數為 42 695 間。

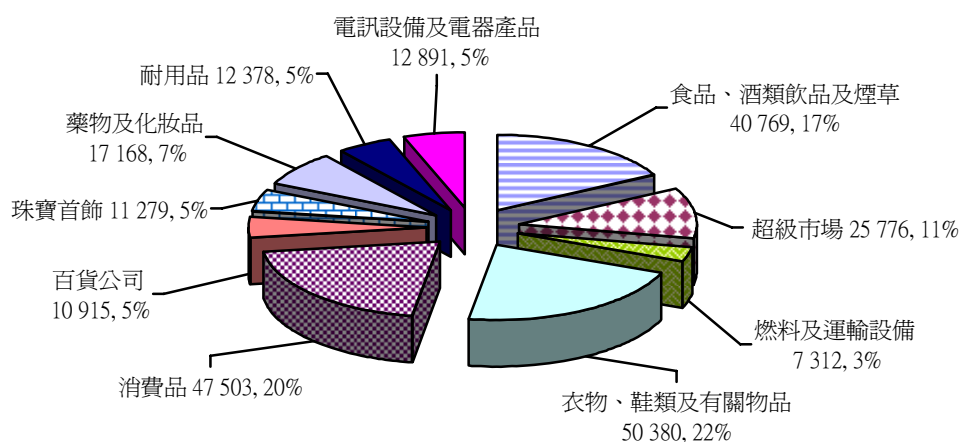
人力分布情況

2.4 為方便檢討及比較，調查將零售業分為十個類別，以下為按類別劃分的人力分布情況：

類別	僱員人數	職位空缺	人力需求
1. 食品、酒類飲品及煙草	40 287	482	40 769
2. 超級市場	24 851	925	25 776
3. 燃料及運輸設備	7 283	29	7 312
4. 衣物、鞋類及有關物品	49 146	1 234	50 380
5. 消費品	46 467	1 036	47 503
6. 百貨公司	10 659	256	10 915
7. 珠寶首飾	11 086	193	11 279
8. 藥物及化妝品	16 813	355	17 168
9. 耐用品	11 815	563	12 378
10. 電訊設備及電器產品	12 822	69	12 891
總計	231 229	5 142	236 371

圖一： 各類別的人力需求情況

(總人力需求：236 371 人)



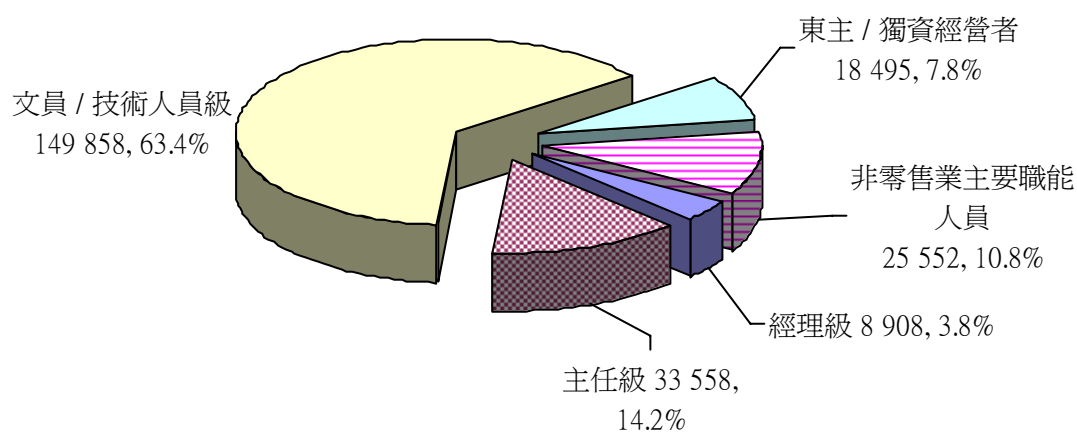
2.5 業內總人力需求 236 371 人中，8 908 人(3.8%)為經理級，33 558 人(14.2%) 為主任級，149 858 人(63.4%) 為文員／技術人員級，18 495 人(7.8%) 為東主／獨資經營者，25 552 人(10.8%)為非零售業主要職能人員。以下為按職級劃分的總人力需求分布情況：

各職級的人力分布情況

職級	僱員人數	職位空缺	人力需求
經理級	8 730	178	8 908
主任級	33 317	241	33 558
文員 / 技術人員級	145 264	4 594	149 858
東主 / 獨資經營者	18 495	-	18 495
零售業主要職能人員	205 806	5 013	210 819
非零售業主要職能人員	25 423	129	25 552
總計	231 229	5 142	236 371

圖二：各職級的人力需求情況

(總人力需求：236 371 人)



2.6 下表為經理級、主任級和文員／技術人員級內僱員人數最多的 3 個主要職務：

職級	僱員人數	佔該職級百分率
經理級		
1. 店舖經理	3 952	44.4%
2. 營運／零售經理	1 569	17.6%
3. 分區／地區經理	703	7.9%
主任級		
1. 店舖／分店主任	28 518	85.0%
2. 採購主任	2 687	8.0%
3. 物流／運輸／倉庫主任	700	2.1%
文員／技術人員級		
1. 初級售貨員	69 151	46.1%
2. 高級售貨員	42 239	28.2%
3. 兼職售貨員	28 848	19.3%

2006 年與 2008 年人力需求比較

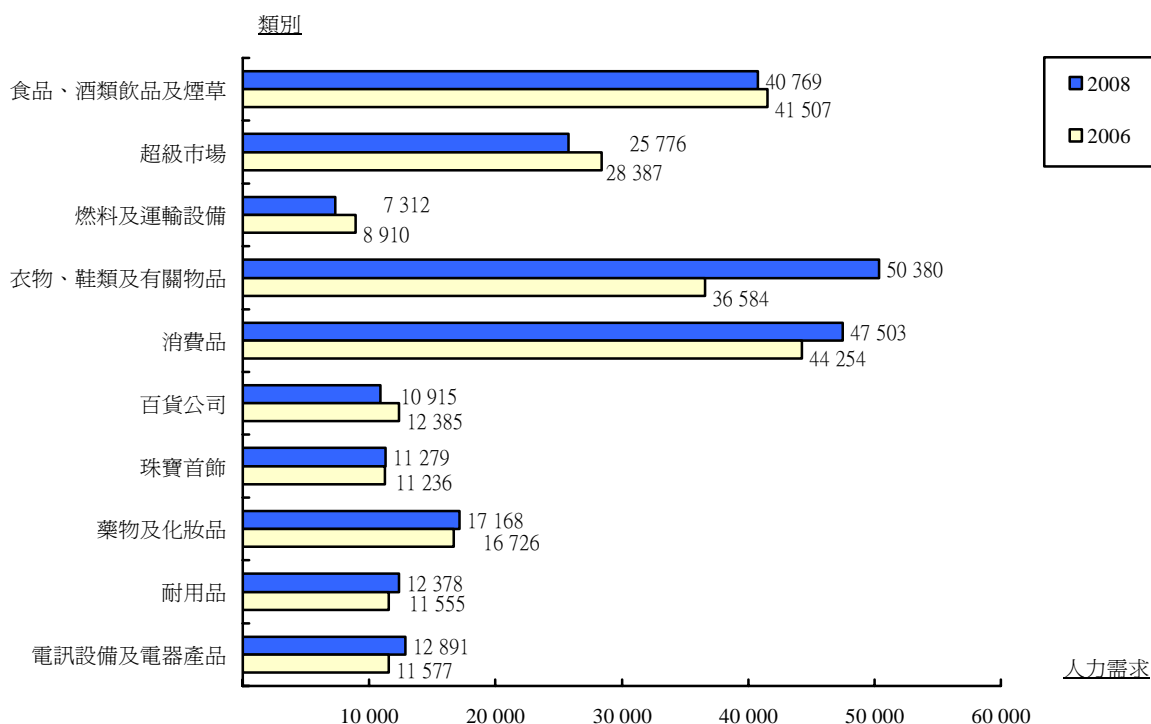
2.7 2008 年調查於 10 月進行，時間與 2006 年的調查相近。因此，兩組數據毋須作季節性調整便可作比較。然而，須注意的是 2006 年香港整體經濟（包括零售業）已處於穩步上揚階段，而金融海嘯則明顯窒礙本港 2008 年最後一季的經濟增長。由於零售業是最受經濟趨勢左右的行業之一，經濟起伏不定必然影響本業的人力情況。

2.8 在 2008 年的調查中，僱員人數四人或以下的公司（83.5%）只需要填寫調查表第一部分（基本資料），以便蒐集核心資料，而無須填寫其訓練需求資料。因此，本會已調整 2006 年調查所得有關訓練需求的數據，以便能與 2008 年數據作直接比較。在詮釋與比較這些數據時，請注意有關轉變。

2.9 與 2006 年比較，2008 年總人力需求（包括零售業主要職能人員及非零售業主要職能人員）增至 236 371 人（5.9%，即 13 250 名僱員）。第五章表三載列兩段期間按類別劃分的人力需求比較。

2.10 在十個類別中，「燃料及運輸設備」(-17.9%)、「百貨公司」(-11.9%)、「超級市場」(-9.2%)以及「食物、酒類飲品及煙草」(-1.8%)的人力在 2008 年錄得下降 (7%，即 6 417 人)，其餘六個類別則錄得增長，當中以「衣物、鞋類及有關物品」的升幅最為強勁 (37.7%)，其次是「電訊設備及電器產品」(11.4%)及「消費品」(7.3%)。

圖三：2006 年與 2008 年各類別的人力需求比較



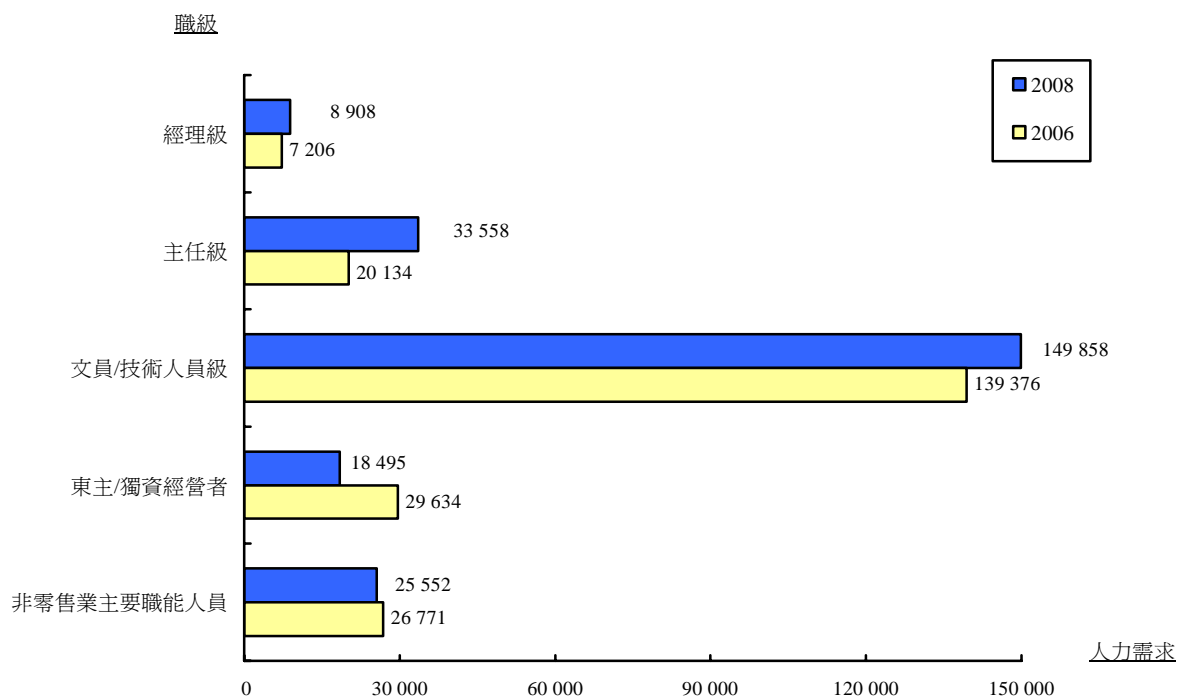
2.11 另一方面，內地更多城市開放個人遊計劃。因此，內地遊客喜愛的產品，例如衣物、鞋類及有關物品、電訊／電器產品及消費品的需求亦相對提高，令有關類別從業員的需求有所增長。

2.12 在十個類別中，由於外圍環境轉差以及油價飆升使運輸設備需求下降，因而影響該類別的人力需求，故相對於 2006 年的調查，「燃料及運輸設備」的人力錄得 17.9%，即 1 598 人的顯著跌幅。

2.13 整體而言，2008 年的總人力需求較 2006 年增加 5.9%，即 13 250 人。如按職級分析，經理級、主任級以及文員／技術人員級的人力需求均較 2006 年有所增加。當中主任級的增幅最大，達 66.7%，即 13 424 人 (2006:17.9%，即 3 052 人)，其次是經理級，增加 23.6%，即 1 702 人 (2006:10.7%，即 669 人)；文員／技術人員級亦錄得 7.5% 增幅，即 10 482 人 (2006:7.6%，即 9 823 人)。數字顯示僱主嘗試聘請主任級人員，而非經理級人員處理零售門市的日常運作，以節省成本。僱主亦預期過往由經理級履行的某些職務將逐步轉由主任級僱員負責。此一情況亦出現於其他行業。

2.14 東主／獨立經營者類別是唯一錄得人力下跌的職級，於 2008 年較 2006 年顯著減少 37.6%，即 11 139 人。由於租金和薪酬高企，東主／獨立經營者或許為獲得更佳的工作保障而放棄營商，重返受僱行列。

圖四：2006 年與 2008 年各職級的人力需求比較



乙. 預測人力需求

僱主對 2009 年的人力預測

2.15 全球經濟危機，以及不明朗經濟前景導致本港經濟出現衰退。根據實質本地生產總值、綜合消費物價指數、私人消費開支及失業率等各主要經濟指標，2009 年的經濟環境相信難以預測及困難。推動零售業的兩大元素，即本港市民的內部消費及入境旅客的旅遊開支，均在 2008 年最後一季向下調整。

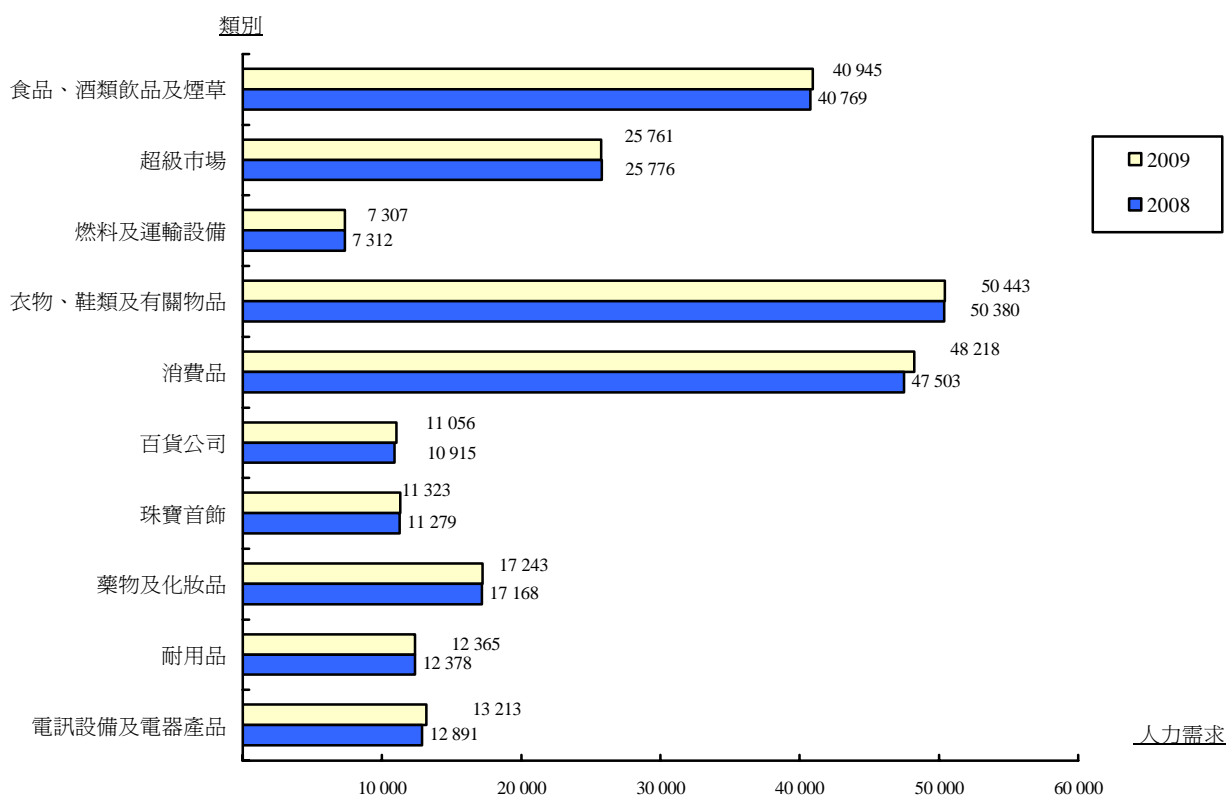
2.16 入境旅客於 2008 年第三季的人數出現跌幅。全球經濟下滑更導致美國及部分歐洲國家的旅客人數急降。幸而內地旅客人數依然錄得溫和增長。中國受經濟危機的影響相對輕微，內地旅客將繼續在支持零售業表現方面扮演重要角色。

2.17 預期內地旅客人數將穩步增長，僱主推算未來 12 個月的人力需求將增加至 237 874 人，增幅為 0.6%，即增加 1 503 人。

僱主對 2009 年人力需求預測

類別	2008 年 人力需求	2009 年 預測需求	增／減
1. 食品、酒類飲品及煙草	40 769	40 945	+176 (+0.4%)
2. 超級市場	25 776	25 761	-15 (-0.1%)
3. 燃料及運輸設備	7 312	7 307	-5 (-0.1%)
4. 衣物、鞋類及有關物品	50 380	50 443	+63 (+0.1%)
5. 消費品	47 503	48 218	+715 (+1.5%)
6. 百貨公司	10 915	11 056	+141 (+1.3%)
7. 珠寶首飾	11 279	11 323	+44 (+0.4%)
8. 藥物及化妝品	17 168	17 243	+75 (+0.4%)
9. 耐用品	12 378	12 365	-13 (-0.1%)
10. 電訊設備及電器產品	12 891	13 213	+322 (+2.5%)
總計	236 371	237 874	+1 503 (+0.6%)

圖五：僱主對 2009 年人力需求預測與 2008 年比較（按類別劃分）



2.18 雖然 2009 年的整體人力預測有 0.6% 增長，但圖五顯示十個類別的其中三個，即「超級市場」(-0.1%)、「燃料及運輸設備」(-0.1%) 和「耐用品」(-0.1%) 在來年的預測人力需求均下跌。在預期增幅的類別當中，雖然僱主對於「電訊設備及電器產品」類別的增長前景最為樂觀，但人力增加幅度亦只有 2.5%。

2.19 下表為僱主對各職級人力需求的預測：

職級	2008 年 人力需求	僱主預測 2009 年 人力需求	增／減
經理級	8 908	8 939	+31 (+0.3%)
主任級	33 558	33 744	+186 (+0.6%)
文員 / 技術人員級	149 858	151 403	+1 545 (+1.0%)
東主 / 獨資經營者	18 495	-	- -
零售業主要職能人員	210 819	212 581	+1 762 (+0.75%)
非零售業主要職能人員	25 552	25 293	-259 (-1.0%)

2.20

下表為需求增幅最大的五個主要職務：

主要職務	2008年 人力需求	僱主預測 2009 年人力需求	增加
初級售貨員	69 151	70 282	+1 131 (+1.6%)
兼職售貨員／服務員	28 848	29 114	+266 (+0.9%)
店舖／分店主任	28 518	28 648	+130 (+0.5%)
高級售貨員	42 239	42 356	+117 (+0.3%)
店舖經理	3 952	4 019	+67 (+1.7%)

2.21 與 2004 年及 2006 年調查結果相若，前線員工（特別是初級售貨員）的增幅依然佔預測人力需求一個重要比重，以配合零售連鎖店因應業務增長而擴充的需要。值得注意的是人力需求增幅名列第二的為「兼職售貨員／服務員」。為應付運作需求，特別是在旺季保持人力資源的靈活性，「兼職售貨員／服務員」的需求將持續增加。

2.22 在主任級中，「店舖／分店主任」預期較 2008 年增加 0.5%，顯示僱主已準備委派主任級員工擔任經理級職務，導致該職級的需求上升。

2.23 「店舖經理」仍是經理級中需求最殷切的職務，需求預期增長達 1.7%。

人力預測 — 人力市場分析法

2.24 除了僱主所作預測，人力市場分析法亦被採用作推算 2009 至 2011 年零售業的人力需求。人力市場分析法的運作機制詳載於**附錄六**。此方法取決於七大主要因素：

- 一、 貸款及墊款總額
- 二、 綜合消費物價指數
- 三、 物業價格指數 (私人住宅)
- 四、 訪港旅客人數
- 五、 服務輸出
- 六、 貨品出口貨量指數
- 七、 貨品進口貨量指數

2.25 根據人力市場分析法，2009年的人力需求將較2008年下降8.8%，即20 811人。在2008年的調查中，僱主預計2009年的人力需求增長為0.6%，即1 503人。由於人力市場分析是於2009年首季進行，當時的經濟指標急速下跌，而僱主則於2008年10月進行預測，這或許是導致結果有所矛盾的原因。2009至2011年的人力需求推算如下：

	實際人數	人力市場分析法 推算人數
2008	236 371	-
2009	-	215 560 (-8.8%)*
2010	-	220 526 (+2.3%)**
2011	-	221 867 (+0.6%)**

附註：

* 與2008年實際人力數字比較的變動百分率。

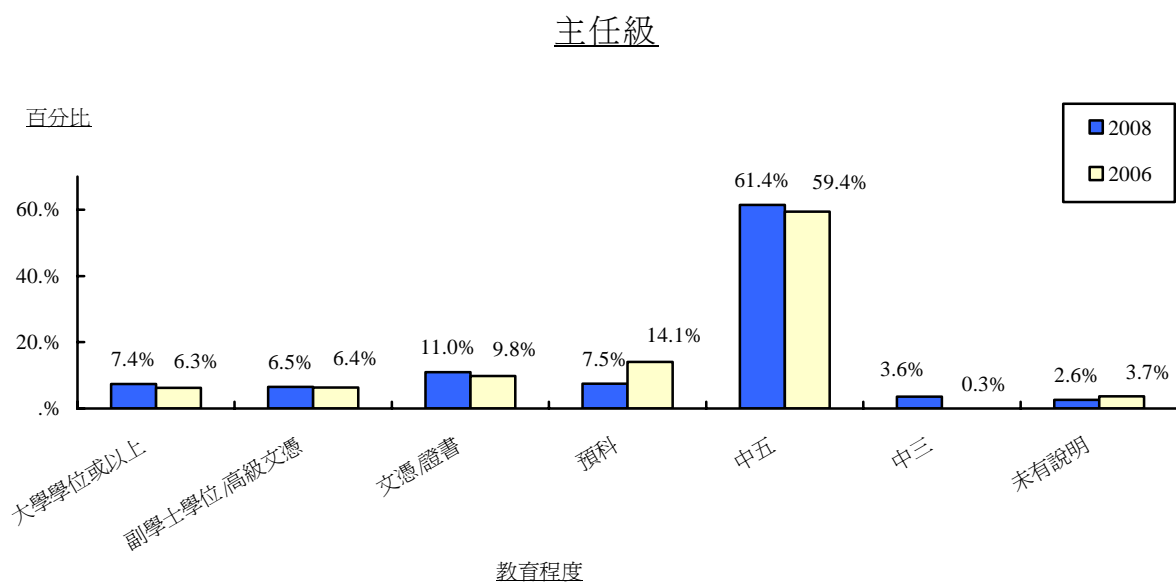
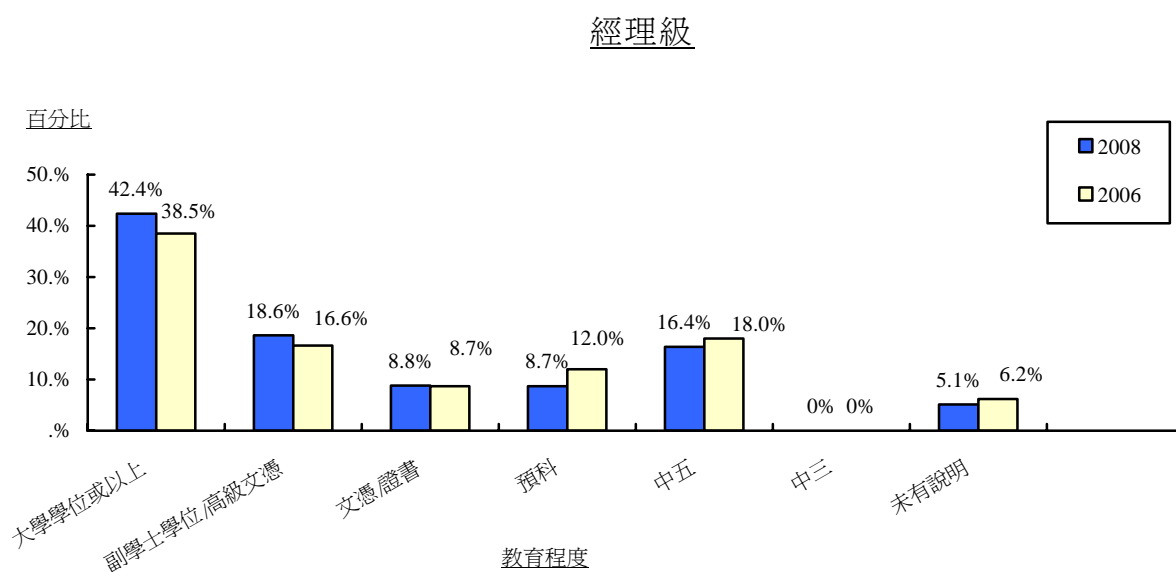
** 與前一年推算人力數字比較的變動百分率。

丙. 招聘要求

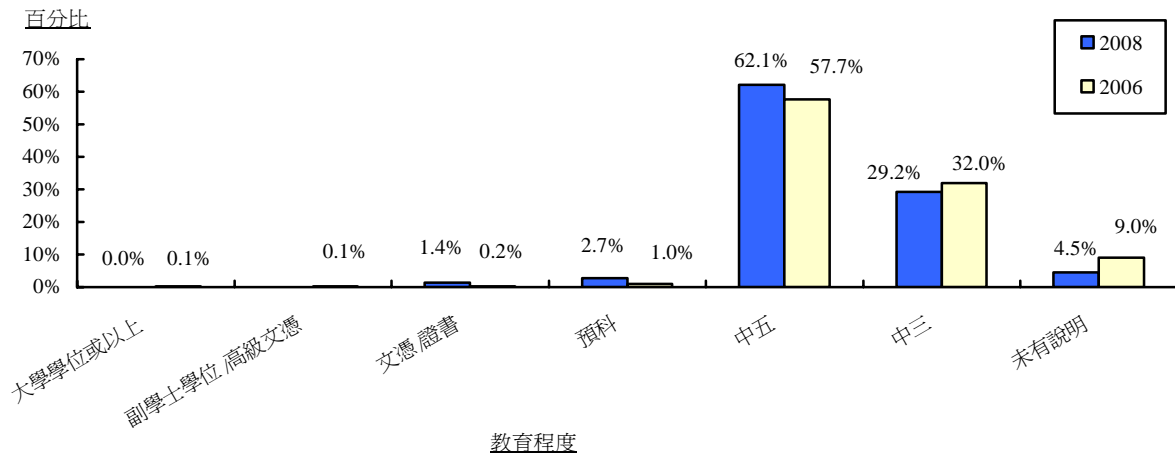
僱員宜有的教育程度

2.26 以下圖表摘錄僱主認為僱員宜有的教育程度。詳細數據見第五章表六。

圖六：2006 及 2008 年各職級宜有的教育程度



文員／技術人員級



2.27 圖六顯示，42.4% 的僱主認為經理級僱員宜有大學或以上的教育程度，而 27.4% 認為他們擁有副學位程度(即副學士、高級文憑或文憑)便可；至於主任級人員方面，只有 7.4% 僱主認為他們需有大學或以上的學歷，17.5% 屬意他們擁有副學位程度，而 68.9% 認為預科或中五程度已經足夠。91.3% 僱主接受文員／技術人員級具有中三或中五程度。

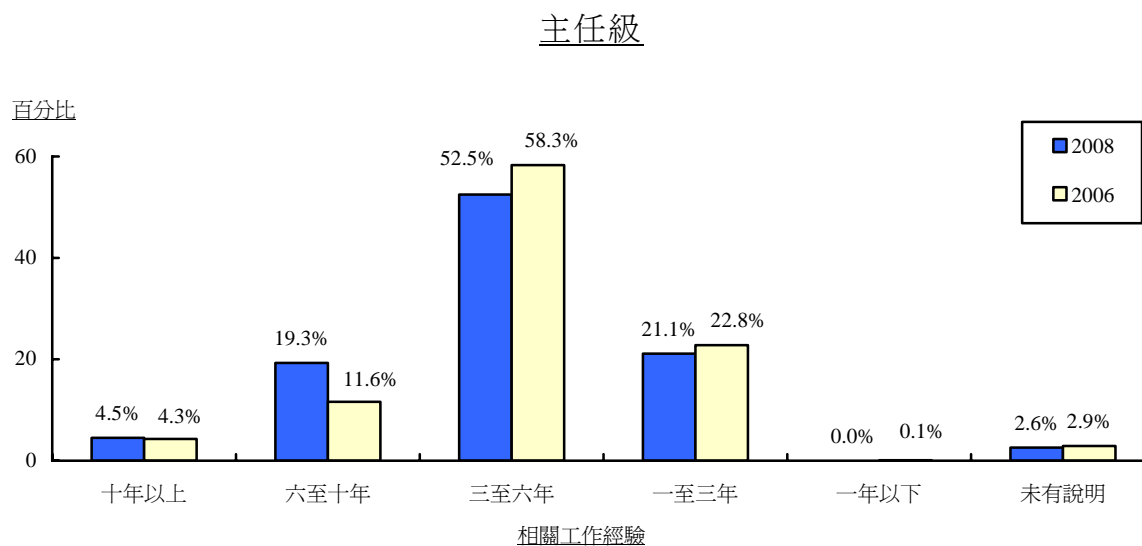
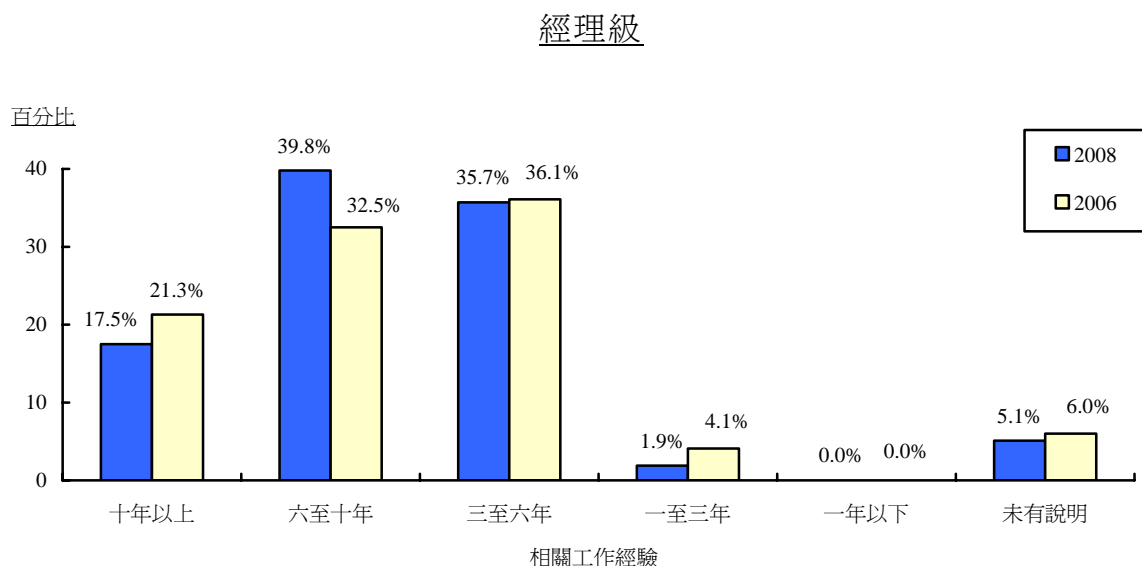
2.28 由於僱主有意提升零售業整體服務水準，因此相比 2006 年，2008 年更多僱主認為經理級及主任級僱員宜具備大學或以上程度。另一方面，副學士、文憑及預科這類學歷的界線模糊，僱主認為分別不大。

2.29 另一個值得關注的現象是，僱主屬意主任級或文員／技術人員級僱員具中五教育程度的百分比上升，顯示僱主希望聘請學歷較高的人士擔任經理級職位。整體而言，中五程度是大部分零售業僱主願意接受的最低學歷。

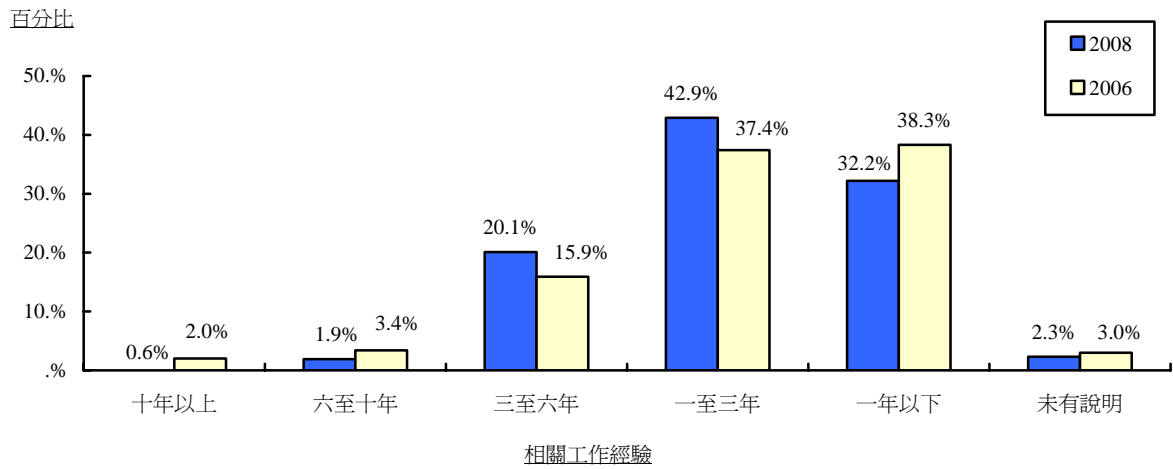
宜有相關工作經驗

2.30 圖七扼要列出僱主認為僱員宜有的相關工作經驗。詳細數據見第五章表七。

圖七：2006及2008年各職級的宜有相關工作經驗



文員／技術人員級



2.31 與宜有教育程度比較，2008 年僱主屬意僱員具備更多工作經驗，但認為經理級僱員需要具有十年以上工作經驗的僱主人數則輕微下降，顯示更多僱主在僱用或晉升經理級人員時，會以教育程度為主要考慮因素。

2.32 與宜有教育程度比較，屬意文員／技術人員級員工具備「一至三年」與「三至六年」工作經驗的僱主分別上升 5.5% 及 4.2%。這顯示在考慮聘用文員／技術人員級員工時，工作經驗的重要性有所增強。

丁. 訓練需求

2.33 閱讀時請注意只有僱員人數五人或以上的公司 (16.5%) 方需要回答調查表中有關培訓的問題，本會已調整 2006 年調查所得與訓練需求相關的數據，以便能作直接比較。

訓練需求

2.34 調查顯示，僱主於 2008 年提供或資助的訓練名額共有 124 901 個，較 2006 年減少 12%。2006 年的人均訓練名額為 0.7 個，2008 年則縮減至約 0.5 個。提供予文員／技術人員級僱員的訓練佔大多數 (79%)。經理級及主任級，以及文員／技術人員的訓練分別減少 14.9% 及 11.1%

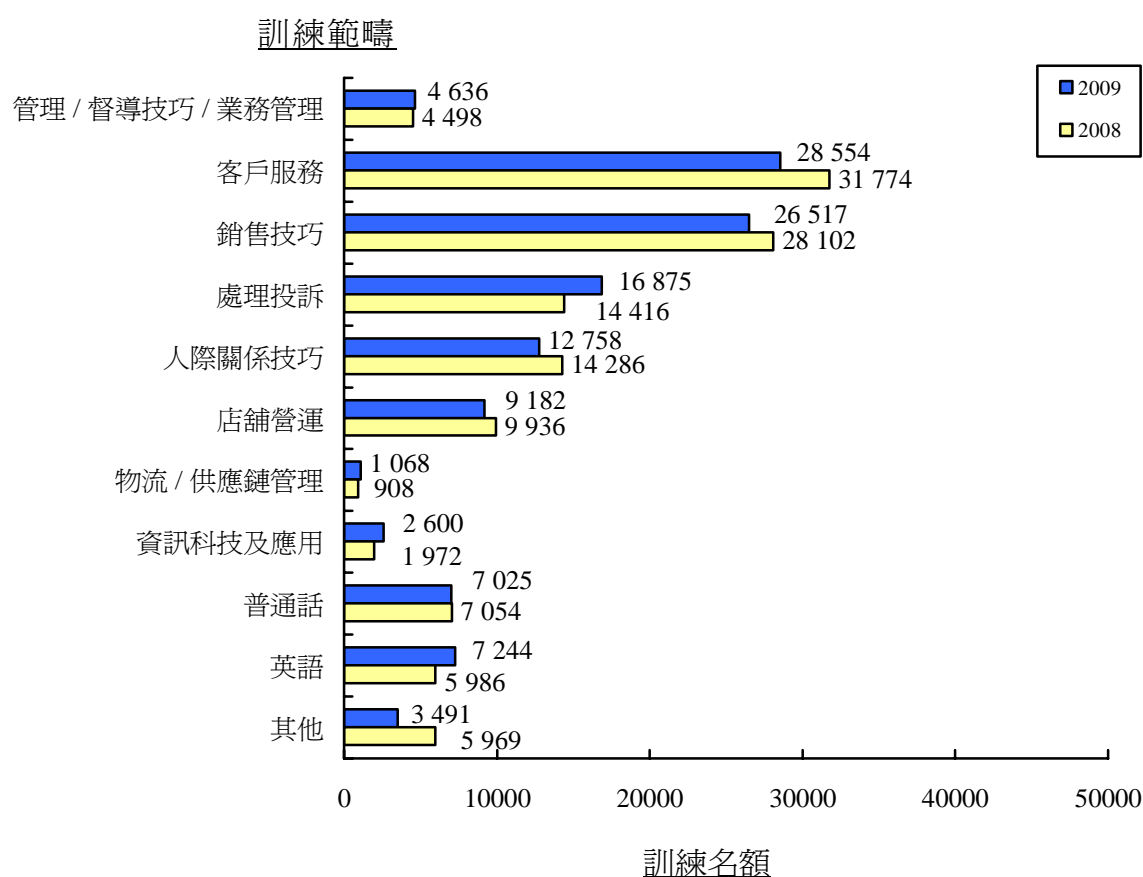
2.35 2006 及 2008 年蒐集到的資料顯示，提供訓練的範疇有所改變。2006 年調查顯示只有「人際關係技巧」、「物流」及「供應鏈管理」的訓練名額有所增加，且全部均針對前線人員。然而 2008 年調查顯示，其他訓練範疇的百分比，不論任何職級均出現下降，這表示基本上僱員已接受過有關範疇的訓練，而訓練資源亦有所減少。詳細統計數字載於第五章表八至十。

2.36 數字亦顯示僱主來年提供培訓時將更加保守。預期 2009 年由僱主提供或資助的訓練名額，將減至 119 950 個 (4%)。在訓練範疇方面，最大的增長將為資訊科技及應用 (31.8%)，以及英語 (21%)，顯示業界更依賴資訊科技應用和有效的溝通，以應付業務增長。其他預期增幅明顯的範疇包括物流／供應鏈管理(17.6%) 及處理投訴 (17.1%)。

僱主提供 / 資助的訓練名額

訓練範疇	2008 年	2009 年 預測	增 / 減	
1. 管理 / 督導技巧 / 業務管理	4 498	4 636	+138	(+3.1%)
2. 客戶服務	31 774	28 554	-3 220	(-10.1%)
3. 銷售技巧	28 102	26 517	-1 585	(-5.6%)
4. 處理投訴	14 416	16 875	+2 459	(+17.1%)
5. 人際關係技巧	14 286	12 758	-1 528	(-10.7%)
6. 店舖營運	9 936	9 182	-754	(-7.6%)
7. 物流 / 供應鏈管理	908	1 068	+160	(+17.6%)
8. 資訊科技及應用	1 972	2 600	+628	(+31.8%)
9. 普通話	7 054	7 025	-29	(-0.4%)
10. 英語	5 986	7 244	+1 258	(+21.0%)
11. 其他	5 969	3 491	-2 478	(-41.5%)
總計	124 901	119 950	-4 951	(-4.0%)

圖八：2008 及 2009 年各訓練範疇的培訓需求比較



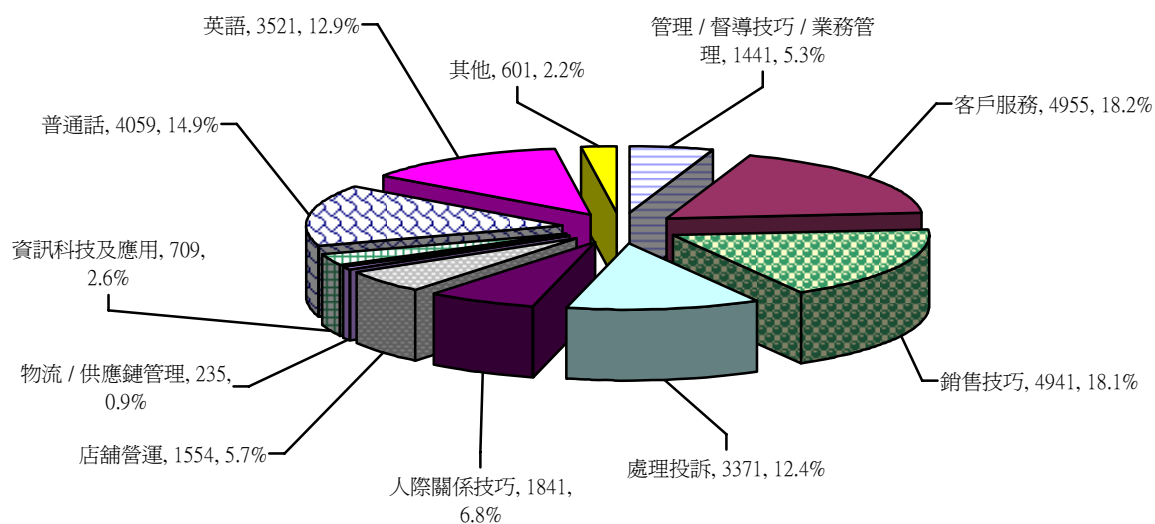
2.37 在 2009 年所需的訓練名額 119 950 個，當中 92 722 個 (77.3%) 將由公司內部提供，而 27 228 個 (22.7%) 則要倚賴外間培訓機構滿足所需。

2.38 具體來說，2009 年不同範疇下需由外間培訓機構提供的訓練名額為：

訓練範疇	訓練名額需求
1. 管理 / 督導技巧 / 業務管理	1 441
2. 客戶服務	4 955
3. 銷售技巧	4 941
4. 處理投訴	3 371
5. 人際關係技巧	1 841
6. 店舖營運	1 554
7. 物流 / 供應鏈管理	235
8. 資訊科技及應用	709
9. 普通話	4 059
10. 英語	3 521
11. 其他	601
總計	27 228

圖九： 需由外間機構提供的名額(按訓練範疇劃分)

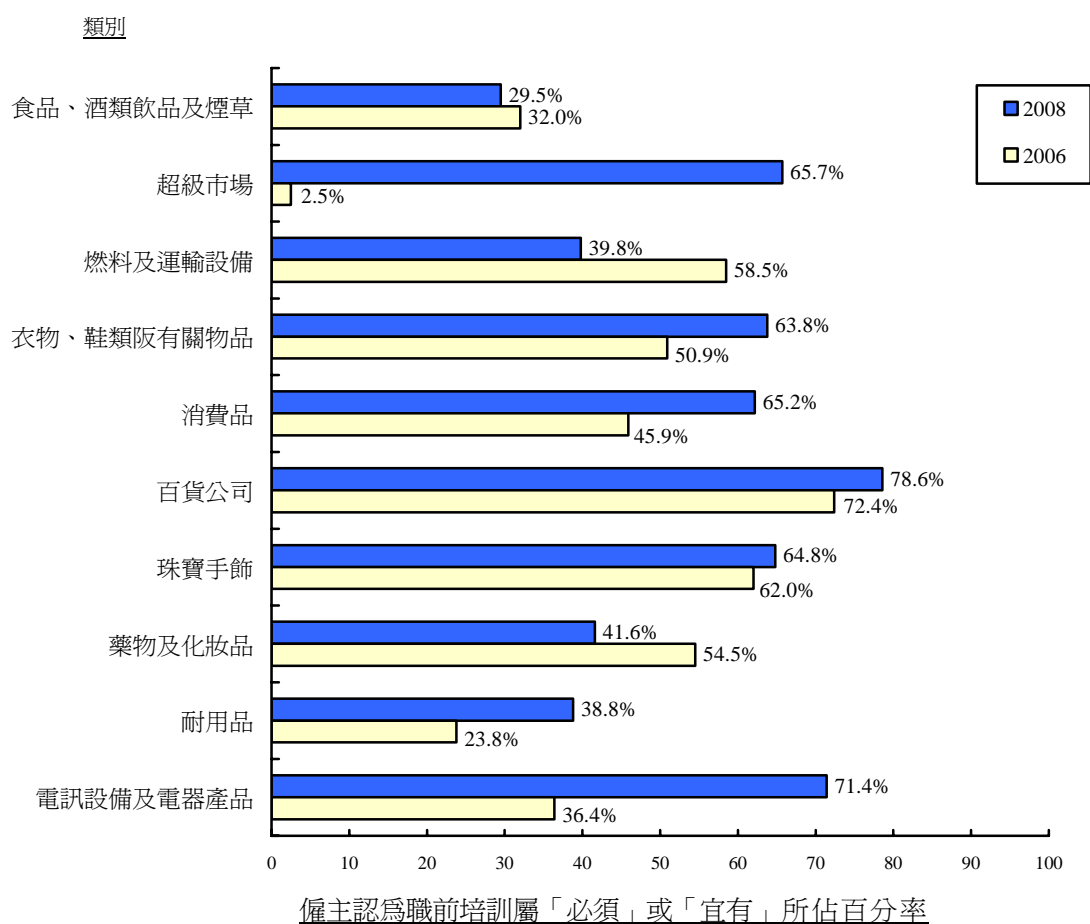
(需由外間培訓機構提供的名額：27 228)



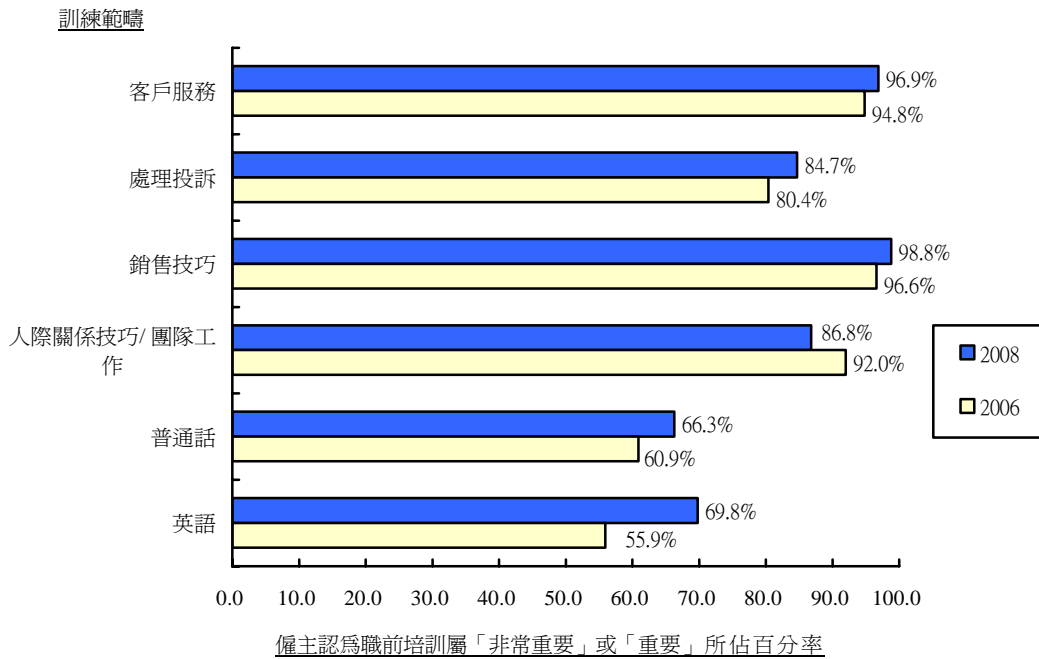
職前培訓

2.39 「職前培訓」指為準備投身工作或加入某行業的人士所提供的入職訓練。承接過去幾年的上升趨勢，2008 年調查反映 50.8% 僱主認為職前培訓屬「必須」或「宜有」(2006 年：47.5%，2004 年：37.8%)。數字顯示僱主極希望僱用已接受訓練的僱員。如按類別分析，「百貨公司」、「電訊設備及電器產品」及「超級市場」最需要職前培訓。詳細統計數字見第五章表十一及十二。

圖十：2006 及 2008 年前線銷售人員的職前培訓需求
(按類別劃分)



圖十一：2006 及 2008 年前線銷售人員的職前培訓需求
(按訓練範疇劃分)



2.40 職前培訓的需求圍繞六大訓練範疇作出評估，下表顯示僱主認為「非常重要」或「重要」的首三個訓練範疇。調查結果與 2006 年大致相同。

訓練範疇	職前培訓屬「非常重要」或「重要」
1. 銷售技巧	98.8%
2. 客戶服務	96.9%
3. 人際關係技巧／團隊工作	86.8%

2.41 調查顯示「銷售技巧」、「客戶服務」及「人際關係技巧／團隊工作」的職前及在職培訓比以前更受重視，顯示銷售技巧在提升零售業銷售額方面的重要價值。

戊. 趨勢

2.42 進行人力調查，目的是為瞭解零售業整體人力及訓練需求的發展。現將過往幾年若干指示參數所呈現並值得關注的趨勢表列如下，在詮釋這些趨勢時，應留意當時的經濟環境，因此不建議作直接比較。

2.43 閱讀時請注意由於只有僱員人數五人或以上的公司 (16.5%) 需要回答調查表中有關培訓的問題，因此訓練需求急跌 25.7% 並不同整體狀況。然而值得注意的是，受訪公司數目減少對整體訓練需求的影響甚微，因為在 2006 年，僅有 4 759 個訓練名額 (3%) 是由僱員人數四人或以下的公司提供或資助，故相信需求仍有雙位數字的下跌。職前培訓愈見重要，員工的流動率亦下降，或許是導致此一狀況的原因。

一、 零售業總人力需求

年份	總人力需求	
	人數	較上次調查增減百分比
2000	167 813	-
2002	206 758	+23.2%
2004	206 971	+0.1%
2006	223 121	+7.8%
2008	236 371	+5.9%

二、 空缺數目

年份	空缺數目	
	數目	佔總人力百分比
2000	3 121	1.9%
2002	1 166	0.6%
2004	4 083	2.0%
2006	4 206	1.9%
2008	5 142	2.2%

三、 整體訓練需求

年份	訓練需求	
	估計未來 12 個月 所需訓練名額	較上次調查增減 百分比
2000	92 411	-
2002	133 308	+44.3%
2004	158 708	+19.1%
2006	161 479	+1.7%
2008	119 950 [#]	-25.7%

四、 兼職售貨員數目

年份	兼職售貨員數目*	
	人數	較上次調查增減 百分比
2002	19 211	-
2004	25 862	+34.6%
2006	27 031	+4.5%
2008	28 848	+6.7%

附註：

* 包括空缺數目

只有僱員人數五人或以上（16.5%）的公司方填寫訓練名額

五、 人力流動率

類別	人力流動率 佔人力需求百分比 (按類別劃分)		
	2004	2006	2008
食品、酒類飲品及煙草	21.1%	16.4%	10.4%
超級市場	27.9%	13.7%	13.9%
燃料及運輸設備	14.4%	14.4%	10.9%
衣物、鞋類及有關物品	30.0%	21.1%	14.6%
消費品	18.3%	8.1%	9.2%
百貨公司	39.4%	10.0%	12.8%
珠寶首飾	20.6%	12.4%	11.8%
藥物及化妝品	20.3%	13.6%	13.4%
耐用品	27.6%	25.0%	13.1%
電訊設備及電器產品	23.6%	21.7%	23.5%
平均數	23.7%	15.0%	12.7%

職級	人力流動率 佔人力需求百分比 (按職級劃分)		
	2004	2006	2008
經理級	12.5%	10.1%	6.8%
主任級	7.2%	8.5%	4.3%
文員 / 技術人員	31.5%	18.1%	18.7%

第三章

建議

甲. 訓練需求

3.1 調查結果顯示，業界在未來 12 個月需要 119 950 個訓練名額，其中 92 722 個屬公司內部培訓，27 228 個則主要由外間培訓機構提供，後者按主要訓練範疇劃分如下：

訓練範疇	外間培訓機構提供的 訓練名額
管理／督導技巧	1 441
零售專業技巧	17 606
語言課程	7 580
其他	601
總計	27 228

3.2 政府推出自由行措施和刺激經濟方案，然而零售業的中短期業務前景不明朗，預期增長會放緩。為配合僱主對外間培訓的需求，本訓練委員會建議：

- 一、 香港特區政府資助的技能提升計劃(SUS)及持續進修基金(CEF)可為一些資源較少或缺乏資源進行內部培訓的公司，提供財政資助，讓業界進行在職培訓，應付技術要求。因此，本會支持繼續推行這些資助計劃，幫助本業發展。
- 二、 僱員再培訓局(ERB)放寬接受資助的準則，並增加再培訓名額，有助本業的失業人士重投勞動市場，穩定就業率。
- 三、 新高中課程的應用學習課程應包括零售相關技能，協助學生學習零售業基礎理論及概念，讓學生有機會探索是否適合投身在零售業發展。

資歷架構

3.3 政府推行資歷架構(QF)，是一個七級跨界別的資歷級別制度，涵蓋學歷及不同行業所需的資歷。資歷架構訂立統一資歷標準及清晰銜接階梯，協助進修人士確定清晰目標及方向，取得具有質素保證的資歷。政府已分階段協助多個行業成立其行業培訓諮詢委員會(ITACs)，本會促請政府為零售業成立行業培訓諮詢委員會，讓從業員可按行業需要，根據資歷架構訂立的清晰進修途徑進修知識技能，從而發展事業。

培訓服務機構

3.4 內地訪港遊客人數增加，因此，需要為本業僱員提供更多有關語文及行業專門技能的訓練。

3.5 除了擴大培訓範圍外，建議職業訓練局等培訓機構推行多種培訓模式，例如電子學習及單元儲修制課程，令課程靈活性更大，讓因工作時間較長或輪班工作而未能定時上課的人士也可進修。

3.6 除了在職培訓外，亦不應忽視職前培訓，以便吸引更多合資格的年輕人投身本業。因此，可於一些專業訓練課程中加入行業的基本知識及技能，讓學生畢業後可更容易投入工作。

僱主

3.7 語文、銷售及客戶服務是零售業的主要訓練範疇。因此，各公司可請培訓機構開發為僱員度身訂做的培訓課程，培訓本業的專門技能。

3.8 培訓的效益很大程度取決於僱主是否支持。為了鼓勵僱員出席及完成培訓課程，建議僱主可提供不同的獎勵，例如在可行的情況下提供補假、金錢資助或晉升機會。

僱員

3.9 要最有效運用上述持份者所匯集的力量及資源，僱員的心態亦同樣重要。他們須致力訂立長遠目標，並且明白到終身學習的重要性。從業員須面對本業需求的轉變，方可繼續在競爭激烈又波動的零售業中工作。

乙. 日後調查

3.10 本訓練委員會建議日後繼續每兩年進行一次人力調查，讓有關各方更了解零售業的人力情況，預測未來轉變，採取相應對策。

第四章

調查範圍及方法

甲. 零售業訓練委員會

訓練委員會

4.1 零售業訓練委員會隸屬職業訓練局，成員由政府委任，職責包括評估零售業的人力及訓練需求，並向職訓局建議措施，應付本業需要。本會的職權範圍及委員名單見**附錄一及二**。

人力調查工作小組

4.2 訓練委員會轄下成立了工作小組，在政府統計處的協助下，統籌及指導人力調查的調查表設計、抽樣、資料分析及匯報。工作小組成員名單見**附錄三**。

深入訪問

4.3. 本會就零售業經濟及人力前景進行了幾次深入訪問，蒐集意見。參與訪問人士的名單載於**附錄四**。

2008年調查的轉變

4.4 為求更有效地蒐集資料，緊貼市場趨勢，2008年的調查作出了下列變動：

- 一、 是次調查加入新職稱「**訂單助理(網上服務)**」，配合本業提供的新服務。
- 二、 僱用四名或以下僱員的公司只須填寫調查表第一部分(基本資料)，無須回答有關培訓的問題。

4.5 本訓練委員會認為，上述轉變可改善蒐集所得資料的質素，更有效辨識零售業的人力及訓練需求，從而有助各有關方面採取適當措施。

乙. 調查範圍及方法

調查範圍

4.6 調查採用分層隨機抽樣法，在 36 155*間登記公司中，分別從十個類別選出 674 間公司作調查對象，明細如下：

	類別	選定 公司數目
1	食品、酒類飲品及煙草	84
2	超級市場	31
3	燃料及運輸設備	61
4	衣物、鞋類及有關物品	142
5	消費品	89
6	百貨公司	30
7	珠寶首飾	65
8	藥物及化妝品	58
9	耐用品	45
10	電訊設備及電器產品	69
	總計	674

調查程序

4.7 2008 年 10 月 13 日舉行了一個簡介會，向進行實地調查的政府統計處職員簡介零售業的人力情況及不同工作性質，並協助他們於進行調查前更瞭解零售業。

4.8 實地調查工作於 2008 年 10 月進行，其中大部分調查表均於隨後幾個月填妥交回。

4.9 實地調查前，本會將調查表、附註、工作說明等寄給各選定公司。有關文件見附錄五。

附註：

* 剔除機構單位記錄庫中不活躍商號後的登記公司數目有 36 155 間。2008 年零售業公司的總數為 42 695 間。

4.10 政府統計處職員到各選定公司協助填寫及收回調查表。所有調查表均經過覆核及編碼，並在有需要時，與填覆公司核對資料，然後交回政府統計處處理及編製圖表。

回應率

4.11 674 間選定公司中，510 間填覆調查表，26 間拒絕回應，其餘則或未能聯絡、不再從事零售業、已合併、搬遷、暫停營業或結業。整體有效回應率為 95.1%。

第五章

統計表

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零售業2008年人力調查

表一：公司及僱員人數、職位空缺及人力總需求（按類別劃分）

	類別	公司數目	調查期間的 僱員人數	調查期間的 職位空缺	總人力需求 (僱員人數 + 空缺)	僱主對 2009年 人力需求的預測	2008年與 2007年比較 (人數)	2008年與 2007年比較 (%)
1	食品、酒類飲品及煙草	9 330	40 287	482	40 769	40 945	176	0.4%
2	超級市場	117	24 851	925	25 776	25 761	- 15	-0.1%
3	燃料及運輸設備	947	7 283	29	7 312	7 307	- 5	-0.1%
4	衣物、鞋類及有關物品	8 254	49 146	1 234	50 380	50 443	63	0.1%
5	消費品	11 368	46 467	1 036	47 503	48 218	715	1.5%
6	百貨公司	28	10 659	256	10 915	11 056	141	1.3%
7	珠寶首飾	1 348	11 086	193	11 279	11 323	44	0.4%
8	藥物及化妝品	1 257	16 813	355	17 168	17 243	75	0.4%
9	耐用品	1 771	11 815	563	12 378	12 365	- 13	-0.1%
10	電訊設備及電器產品	1 735	12 822	69	12 891	13 213	322	2.5%
	總計	36 155*	231 229#	5 142	236 371	237 874	1 503	0.6%

附註：

* 剔除機構單位記錄庫中不活躍商號後的登記公司數目有36 155間。2008年零售業公司的總數為42 695間。

包括零售業主要職能人員 (205 806人) 及非零售業主要職能人員 (25 423人)。

零售業2008年人力調查
表二：僱員分布情況（按類別及職級劃分）

	類別	經理級	主任級	文員／ 技術人員級	兼職售貨員／ 服務員**	東主／ 獨資經營者	類別總計	類別總計 (%)
1	食品、酒類飲品及煙草	679	5 721	20 792	5 298	7 797	40 287	17.4%
2	超級市場	1 410	2 864	11 405	9 172	0	24 851	10.7%
3	燃料及運輸設備	291	1 053	5 452	136	351	7 283	3.1%
4	衣物、鞋類及有關物品	2 590	8 493	30 018	4 727	3 318	49 146	21.3%
5	消費品	1 547	7 987	28 275	3 646	5 012	46 467	20.1%
6	百貨公司	622	1 961	6 470	1 606	0	10 659	4.6%
7	珠寶首飾	774	1 741	7 750	241	580	11 086	4.8%
8	藥物及化妝品	1 381	2 761	10 717	1 499	455	16 813	7.3%
9	耐用品	768	2 007	7 828	710	502	11 815	5.1%
10	電訊設備及電器產品	605	2 071	9 443	223	480	12 822	5.5%
	總計	10 667	36 659	138 150	27 258	18 495	231 229*	100.0%

附註：

* 包括零售業主要職能人員 (205 806人) 及非零售業主要職能人員 (25 423人)。

** 有關數字指總人數。

零售業2008年人力調查

表三：2006與2008年人力需求比較（按類別劃分）

	類別	2006年 總人力需求	2008年 總人力需求	2008年與2006年比較 (%)	僱主對2009年 人力需求的預測	2009年與2008年比較 (%)
1	食品、酒類飲品及煙草	41 507	40 769	-1.8%	40 945	0.4%
2	超級市場	28 387	25 776	-9.2%	25 761	-0.1%
3	燃料及運輸設備	8 910	7 312	-17.9%	7 307	-0.1%
4	衣物、鞋類及有關物品	36 584	50 380	37.7%	50 443	0.1%
5	消費品	44 254	47 503	7.3%	48 218	1.5%
6	百貨公司	12 385	10 915	-11.9%	11 056	1.3%
7	珠寶首飾	11 236	11 279	0.4%	11 323	0.4%
8	藥物及化妝品	16 726	17 168	2.6%	17 243	0.4%
9	耐用品	11 555	12 378	7.1%	12 365	-0.1%
10	電訊設備及電器產品	11 577	12 891	11.4%	13 213	2.5%
	總計	223 121	236 371	5.9%	237 874	0.6%

零售業2008年人力調查
表四：僱員人數、職位空缺及人力總需求（按職務劃分）

職務編號	職務	2008年			2009年預測		
		調查期間的 僱員人數	調查期間的 職位空缺	總人力需求 (僱員人數 + 空缺)	僱主對 2009年人力需求的 預測	與2008年比較 (人數)	與2008年比較 (%)
經理級							
111	總經理	626	1	627	627	0	0.0%
112	營運／零售經理	1 566	3	1 569	1 566	-3	-0.2%
113	分區／地區經理	685	18	703	704	1	0.1%
114	店舖經理	3 823	129	3 952	4 019	67	1.7%
115	市場推廣經理	623	5	628	620	-8	-1.3%
116	營業經理	501	15	516	489	-27	-5.2%
117	客戶服務經理	89	1	90	89	-1	-1.1%
118	採購主管／經理	533	4	537	538	1	0.2%
119	物流／運輸／倉庫經理	186	1	187	187	0	0.0%
120	培訓經理	98	1	99	100	1	1.0%
	小計	8 730	178	8 908	8 939	31	0.3%
主任級							
211	店舖／分店主任	28 330	188	28 518	28 648	130	0.5%
212	商品陳列主任	350	1	351	351	0	0.0%
213	物流／運輸／倉庫主任	699	1	700	701	1	0.1%
214	公共關係主任／廣告主任	553	7	560	563	3	0.5%
215	客戶服務主任	590	8	598	602	4	0.7%
216	採購主任	2 663	24	2 687	2 732	45	1.7%
217	培訓主任	132	12	144	147	3	2.1%
	小計	33 317	241	33 558	33 744	186	0.6%
文員/技術人員級							
311	高級售貨員	41 887	352	42 239	42 356	117	0.3%
312	初級售貨員	66 729	2 422	69 151	70 282	1 131	1.6%
313	存貨／採購文員	2 039	5	2 044	2 041	- 3	-0.1%
314	存貨助理	6 316	155	6 471	6 505	34	0.5%
315	訂單助理(網上服務)	1 035	70	1 105	1 105	0	0.0%
411	兼職售貨員／服務員*	27 258	1 590	28 848	29 114	266	0.9%
	小計	145 264	4 594	149 858	151 403	1 545	1.0%
198	東主／獨資經營者／執行合夥董事	18 495	0	18 495	18 495	0	0.0%
零售業主要職能人員							
199	其他經理	1 937	5	1 942	1 837	-105	-5.4%
299	其他主任	3 342	13	3 355	3 302	- 53	-1.6%
399	其他文員／支援人員	20 144	111	20 255	20 154	- 101	-0.5%
	總計	231 229	5 142	236 371	237 874	1 503	0.6%

附註：

* 有關數字指總人數。

零售業2008年人力調查
表五：2006與2008年人力需求比較（按職務劃分）

職務編號	職務	2006年 總人力需求	2008年 總人力需求	2008年與 2006年比較	僱主對2009年 人力需求的預測	2009年與 2008年比較
經理級						
111	總經理	601	627	4.3%	627	0.0%
112	營運／零售經理	1 108	1 569	41.6%	1 566	-0.2%
113	分區／地區經理	704	703	-0.1%	704	0.1%
114	店舖經理	3 029	3 952	30.5%	4 019	1.7%
115	市場推廣經理	440	628	42.7%	620	-1.3%
116	營業經理	472	516	9.3%	489	-5.2%
117	客戶服務經理	105	90	-14.3%	89	-1.1%
118	採購主管／經理	504	537	6.5%	538	0.2%
119	物流／運輸／倉庫經理	173	187	8.1%	187	0.0%
120	培訓經理	70	99	41.4%	100	1.0%
	小計	7 206	8 908	23.6%	8 939	0.3%
主任級						
211	店舖／分店主任	16 303	28 518	74.9%	28 648	0.5%
212	商品陳列主任	299	351	17.4%	351	0.0%
213	物流／運輸／倉庫主任	596	700	17.4%	701	0.1%
214	公共關係主任／廣告主任	375	560	49.3%	563	0.5%
215	客戶服務主任	619	598	-3.4%	602	0.7%
216	採購主任	1 838	2 687	46.2%	2 732	1.7%
217	培訓主任	104	144	38.5%	147	2.1%
	小計	20 134	33 558	66.7%	33 744	0.6%
文員/技術人員級						
311	高級售貨員	44 795	42 239	-5.7%	42 356	0.3%
312	初級售貨員	61 595	69 151	12.3%	70 282	1.6%
313	存貨／採購文員	1 576	2 044	29.7%	2 041	-0.1%
314	存貨助理	4 379	6 471	47.8%	6 505	0.5%
315	訂單助理(網上服務)	0	1 105	0.0%	1 105	0.0%
411	兼職售貨員／服務員*	27 031	28 848	6.7%	29 114	0.9%
	小計	139 376	149 858	7.5%	151 403	1.0%
198	東主／獨資經營者／執行合夥董事	29 634	18 495	-37.6%	18 495	0.0%
零售業主要職能人員總數		196 350	210 819	7.4%	212 581	0.8%
199	其他經理	1 613	1 942	20.4%	1 837	-5.4%
299	其他主任	4 077	3 355	-17.7%	3 302	-1.6%
399	其他文員／支援人員	21 081	20 255	-3.9%	20 154	-0.5%
總計		223 121	236 371	5.9%	237 874	0.6%

附註：

*有關數字指總人數。

零售業2008年人力調查
表六：僱員宜有教育程度（按職務劃分）

職務	大學學位 或以上	副學士學位/ 專業文憑/ 高級文憑/ 高級證書或 同等學歷	文憑/證書 或同等學歷	預科	中五	中三	其他	未有說明	總計
經理級									
總經理	479	9	1	36	70	0	0	31	626
營運/零售經理	868	247	142	92	208	0	0	9	1 566
分區/地區經理	251	146	189	18	49	0	0	32	685
店舖經理	884	905	326	506	902	0	0	300	3 823
市場推廣經理	337	111	23	9	131	0	0	12	623
營業經理	297	73	31	53	42	0	0	5	501
客戶服務經理	55	5	9	2	3	0	0	15	89
採購主管/經理	346	86	24	33	20	0	0	24	533
物流/運輸/倉庫經理	120	24	15	10	7	0	0	10	186
培訓經理	68	17	8	2	0	0	0	3	98
小計	3 705	1 623	768	761	1 432	0	0	441	8 730
佔該職級百分比 (總數：8 730)	42.4%	18.6%	8.8%	8.7%	16.4%	0.0%	0.0%	5.1%	100.0%
主任級									
店舖/分店主任	1 748	1 492	2 236	2 238	19 030	973	0	613	28 330
商品陳列主任	48	85	99	51	57	0	0	10	350
物流/運輸/倉庫主任	44	48	156	54	375	13	0	9	699
公共關係主任/廣告主任	231	96	108	26	82	0	0	10	553
客戶服務主任	61	84	64	42	284	0	0	55	590
採購主任	279	312	985	77	628	212	0	170	2 663
培訓主任	51	42	17	5	11	0	0	6	132
小計	2 462	2 159	3 665	2 493	20 467	1 198	0	873	33 317
佔該職級百分比 (總數：33 317)	7.4%	6.5%	11.0%	7.5%	61.4%	3.6%	0.0%	2.6%	100.0%
文員/技術人員級									
高級售貨員	0	52	878	1 528	31 581	5 561	1 007	1 280	41 887
初級售貨員	0	60	496	1 763	44 544	18 697	98	1 071	66 729
存貨/採購文員	0	15	148	248	1 358	191	0	79	2 039
存貨助理	0	0	32	46	2 556	3 497	71	114	6 316
訂單助理(網上服務)	0	0	268	0	717	10	0	40	1 035
兼職售貨員*	0	0	165	341	9 481	14 482	1 996	793	27 258
小計	0	127	1 987	3 926	90 237	42 438	3 172	3 377	145 264
佔該職級百分比 (總數：145 264)	0.0%	0.1%	1.4%	2.7%	62.1%	29.2%	2.2%	2.3%	100.0%

附註：

* 有關數字指總人數。

零售業2008年人力調查
表七：僱員宜有相關工作年資（按職務劃分）

職務	十年以上	六至十年	三至六年	一至三年	少於一年	未有說明	總計
經理級							
總經理	255	202	138	0	0	31	626
營運／零售經理	198	769	495	95	0	9	1 566
分區／地區經理	142	368	139	4	0	32	685
店舖經理	643	1 394	1 429	57	0	300	3 823
市場推廣經理	32	168	411	0	0	12	623
營業經理	42	274	175	5	0	5	501
客戶服務經理	13	33	28	0	0	15	89
採購主管／經理	135	158	214	2	0	24	533
物流／運輸／倉庫經理	51	69	53	3	0	10	186
培訓經理	18	43	33	1	0	3	98
小計	1 529	3 478	3 115	167	0	441	8 730
佔該職級百分比 (總數 : 8 730)	17.5%	39.8%	35.7%	1.9%	0.0%	5.1%	100.0%
主任級							
店舖／分店主任	1 463	5 943	14 513	5 798	0	613	28 330
商品陳列主任	7	49	214	70	0	10	350
物流／運輸／倉庫主任	4	47	522	117	0	9	699
公共關係主任／廣告主任	2	58	330	153	0	10	553
客戶服務主任	7	13	153	362	0	55	590
採購主任	1	314	1 688	490	0	170	2 663
培訓主任	2	18	66	40	0	6	132
小計	1 486	6 442	17 486	7 030	0	873	33 317
佔該職級百分比 (總數 : 33 317)	4.5%	19.3%	52.5%	21.1%	0.0%	2.6%	100.0%
文員／技術人員級							
高級售貨員	885	1 664	25 410	12 098	550	1 280	41 887
初級售貨員	0	90	2 874	39 319	23 375	1 071	66 729
存貨／採購文員	0	7	370	1 338	245	79	2 039
存貨助理	0	99	377	2 634	3 092	114	6 316
訂單助理 (網上服務)	0	0	128	141	726	40	1 035
兼職售貨員*	31	840	8	6 812	18 774	793	27 258
小計	916	2 700	29 167	62 342	46 762	3 377	145 264
佔該職級百分比 (總數 :145 264)	0.6%	1.9%	20.1%	42.9%	32.2%	2.3%	100.0%

附註：

* 有關數字指總人數。

零售業2008年人力調查

表八：過去12個月僱主提供／資助的訓練名額（按職級劃分）

訓練範疇	經理及主任級	文員／技術人員級	總計	僱主對2009年 人力需求的預測	2009年與2008年比較
管理培訓					
管理／督導技巧／業務管理	4 071	427	4 498	4 636	3.1%
行業專門培訓					
客戶服務	3 937	27 837	31 774	28 554	-10.1%
銷售技巧	4 006	24 096	28 102	26 517	-5.6%
處理投訴	2 530	11 886	14 416	16 875	17.1%
人際關係技巧	2 730	11 556	14 286	12 758	-10.7%
店舖營運	5 400	4 536	9 936	9 182	-7.6%
物流／供應鏈管理	368	540	908	1 068	17.6%
資訊科技及應用	591	1 381	1 972	2 600	31.8%
語言					
普通話	981	6 073	7 054	7 025	-0.4%
英語	739	5 247	5 986	7 244	21.0%
其他					
	803	5 166	5 969	3 491	-41.5%
總計	26 156	98 745	124 901	119 950	-4.0%

附註：

1. 不包括僱員人數少於4人的公司。

零售業2008年人力調查

表九：未來12個月僱主擬提供／資助的訓練名額（按職級劃分）

訓練範疇	經理及主任級	文員／ 技術人員級	總計	內部培訓 百分率	外間培訓 百分率	外間培訓 所需名額
管理培訓						
管理／督導技巧／業務管理	4 303	333	4 636	68.9%	31.1%	1 441
行業專門培訓						
客戶服務	3 749	24 805	28 554	82.6%	17.4%	4 955
銷售技巧	3 505	23 012	26 517	81.4%	18.6%	4 941
處理投訴	3 081	13 794	16 875	80.0%	20.0%	3 371
人際關係技巧	2 853	9 905	12 758	85.6%	14.4%	1 841
店舖營運	4 578	4 604	9 182	83.1%	16.9%	1 554
物流／供應鏈管理	488	580	1 068	78.0%	22.0%	235
資訊科技及應用	629	1 971	2 600	72.7%	27.3%	709
語言						
普通話	1 053	5 972	7 025	42.2%	57.8%	4 059
英語	1 400	5 844	7 244	51.4%	48.6%	3 521
其他	648	2 843	3 491	82.8%	17.2%	601
總計	26 287	93 663	119 950	77.3%	22.7%	27 228

附註：

1. 不包括僱員人數少於4人的公司。

零售業2008年人力調查
表十：2006與2008年僱主提供／資助訓練名額比較

訓練範疇	2006年	2008年	2008年與 2006年比較	僱主對2009年 人力需求的預測	2009年與 2008年比較
管理培訓					
管理／督導技巧／業務管理	7 237	4 498	-37.8%	4 636	3.1%
行業專門培訓					
客戶服務	35 374	31 774	-10.2%	28 554	-10.1%
銷售技巧	31 788	28 102	-11.6%	26 517	-5.6%
處理投訴	14 200	14 416	1.5%	16 875	17.1%
人際關係技巧	11 514	14 286	24.1%	12 758	-10.7%
店舖營運	14 441	9 936	-31.2%	9 182	-7.6%
物流／供應鏈管理	854	908	6.3%	1 068	17.6%
資訊科技及應用	4 325	1 972	-54.4%	2 600	31.8%
語言					
普通話	7 351	7 054	-4.0%	7 025	-0.4%
英語	6 901	5 986	-13.3%	7 244	21.0%
其他	7 877	5 969	-24.2%	3 491	-41.5%
總計	141 862	124 901	-12.0%	119 950	-4.0%

附註：

1. 不包括僱員人數少於4人的公司。

零售業2008年人力調查

表十一：前線銷售僱員的職前培訓需要（按類別劃分）

	類別	必須	宜有	無意見	無需要	未有說明	總計
1	食品、酒類飲品及煙草	132	320	614	466	0	1 532
		8.6%	20.9%	40.1%	30.4%	0.0%	
2	超級市場	8	36	7	14	2	67
		11.9%	53.7%	10.4%	20.9%	3.0%	
3	燃料及運輸設備	12	86	98	50	0	246
		4.9%	35.0%	39.8%	20.3%	0.0%	
4	衣物、鞋類及有關物品	281	449	97	300	17	1 144
		24.6%	39.2%	8.5%	26.2%	1.5%	
5	消費品	165	711	37	429	2	1 344
		12.3%	52.9%	2.8%	31.9%	0.1%	
6	百貨公司	5	17	1	2	3	28
		17.9%	60.7%	3.6%	7.1%	10.7%	
7	珠寶首飾	43	154	39	68	0	304
		14.1%	50.7%	12.8%	22.4%	0.0%	
8	藥物及化妝品	52	156	148	138	6	500
		10.4%	31.2%	29.6%	34.1%	1.2%	
9	耐用品	3	197	123	193	0	516
		0.6%	38.2%	23.8%	37.4%	0.0%	
10	電訊設備及電器產品	22	188	45	37	2	294
		7.5%	63.9%	15.3%	12.6%	0.7%	
	總計	723	2 314	1 209	1 697	32	5 975
		12.1%	38.7%	20.2%	28.4%	0.5%	100.0%

附註：

1. 不包括僱員人數少於4人的公司。
2. 有關數字指公司數目。

零售業2008年人力調查
表十二：職前培訓需要（按訓練範疇劃分）

訓練範疇		十分重要		重要		不太重要		無需要	
		人數	%	人數	%	人數	%	人數	%
1	客戶服務	1 283	42.2%	1 662	54.7%	71	2.3%	21	0.7%
2	處理投訴	694	22.9%	1 877	61.8%	401	13.2%	65	2.1%
3	銷售技巧	1 487	49.0%	1 513	49.8%	22	0.7%	15	0.5%
4	人際關係技巧	525	17.3%	2 110	69.5%	361	11.9%	41	1.4%
5	普通話	160	5.3%	1 853	61.0%	927	30.5%	97	3.2%
6	英語	267	8.8%	1 854	61.0%	846	27.9%	70	2.3%
7	其他	46	85.2%	8	14.8%	0	0.0%	0	0.0%

附註：

1. 不包括僱員人數少於4人的公司。

職業訓練局
訓練委員會職權範圍

1. 確定業內的人力需求，包括收集、分析相關的人力和學生／學員統計數字，以及關於社會經濟、科技及人力市場發展的資料。
2. 評估及研究本業的人力供求是否平衡。
3. 就發展業內專業教育及訓練設施應付人力需求，向職業訓練局提供意見。
4. 就相關學科的課程發展方向及策略，向香港專業教育學院(IVE)、訓練及發展中心提出建議。
5. 就 IVE、訓練及發展中心的課程策劃、課程發展及質素保證制度提供意見。
6. 擬訂本業主要職務的工作範圍，界定所需的技能、知識及訓練。
7. 建議本業主要職務訓練方案，訂定每種技能所需的訓練期。
8. 對技術評估、技能測驗及證書頒發制度提供意見，以確定從業員、學徒及見習員的技能水平。
9. 就本業主要行業舉辦技能比賽提供意見，以推廣專業教育與訓練和派員參加國際賽事。
10. 就本業專業教育及訓練的發展與推廣事宜，與僱主、僱主聯會、工會、專業團體、訓練及教育機構、政府部門等聯絡。
11. 為本業舉辦有關專業教育及訓練的研討會與會議。
12. 就業內訓練委員會工作、有關職訓局專業教育及訓練課程的宣傳事宜提供意見。
13. 每年向局方呈交訓練委員會工作報告，以及相關學科課程發展策略建議。
14. 根據《職業訓練局條例》第 7 條，負責局方所委派的其他工作。

零售業訓練委員會

委員名單

主席

詹德慶先生 (某連鎖店提名)

委員

朱志明先生 (某連鎖店提名)

馮啓華先生 (某連鎖店提名)

古賢倫先生 (某連鎖店提名)

關敏怡博士 (某連鎖店提名)

關百豪先生* (香港零售管理協會提名)

郭以瑩女士+ (某連鎖店提名)

葉焯德先生 (香港零售管理協會提名)

余麗姚女士 (香港零售管理協會提名)

王紫雲先生 (香港百貨商業僱員總會提名)

郭啓興先生 (職業訓練局執行幹事代表)

秘書

梁劍衡先生 (職業訓練局)

* 任期於 2009 年 3 月 31 日屆滿

+ 任期於 2009 年 4 月 1 日開始

零售業訓練委員會
2008年人力調查工作小組委員名單

主席

關敏怡博士 (香港鐵路有限公司)

委員

鄒惠儀女士 (屈臣氏集團)
曹國輝博士 (香港城市大學)
衛有安先生 (華敦國際集團有限公司)
胡子健先生 (利豐(零售)有限公司)
郭啓興先生 (職業訓練局)

列席

林瑋廉先生 (政府統計處)

秘書

梁劍衡先生 (職業訓練局)

深入訪問

2008年零售業人力調查深入受訪人士名單

何婉玲女士	(“反”斗城利豐有限公司)
廖淑華女士	(永安百貨有限公司)
潘寶珍女士	(OK 便利店有限公司)
王巧陽女士	(六福集團)
楊寶茵女士	(Esprit Retail (HK) Ltd.)
阮華生先生	(官燕棧國際有限公司)

秘書

梁劍衡先生	(職業訓練局)
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Vocational Training Council 職業訓練局

Headquarters Division 2 總辦事處二科
20F, Skyline Tower, 39 Wang Kwong Road, Kowloon Bay, Kowloon, Hong Kong
香港九龍九龍灣宏光道39號宏天廣場20樓
www.vtc.edu.hk

Telephone No 電話

Facsimile No 傳真

(852) 2574 3759

Our Reference 本局檔號 () in RT/4/2 (2008)

Your Reference 來函檔號



各位僱主：

2008 年零售業人力調查

職業訓練局屬下零售業訓練委員會將進行 2008 年人力調查，本人謹代表職訓局懇請閣下惠予合作，提供協助。本委員會是由香港特別行政區政府行政長官委任，負責零售業的人力訓練事宜。

為評估本港零售業最新的人力情況及訓練需要，以便制定合適的人力訓練建議，本會將於 2008 年 10 月 13 日至 2008 年 11 月 15 日期間進行人力調查，是次調查將不會收集薪酬資料。

現隨函附上下列中英文對照文件，以供參閱填寫：

1. 調查表（附錄 A）；
2. 調查表附註（附錄 B）；及
3. 主要職務工作說明（附錄 C）。

調查期間，政府統計處職員將造訪 貴機構，解答有關問題，同時收取填妥的調查表。

調查所得資料絕對保密，並只發表摘要統計數字，不會提及個別機構。

敬請以數分鐘時間完成夾附的調查表，調查報告內所有資料可作為 貴公司將來發展參考備用。

有關過去相關的零售業人力調查報告書，可在我們的網站 <http://rttb.vtc.edu.hk> 細閱。

如對調查有任何疑問，請致電 2116 8375 與政府統計處人力統計組聯絡。

承蒙協助，謹此致謝。

A handwritten signature in black ink, appearing to be '詹德慶' (Jan Tak-king), written in a cursive style.

零售業訓練委員會主席
詹德慶

2008 年 10 月 8 日

CONFIDENTIAL
WHEN DATA ENTERED

填入數據後即成
機密文件

Appendix A

附錄A

(For companies with employment size of 4 persons or less)
公司僱員人數四人或以下

VOCATIONAL TRAINING COUNCIL

職業訓練局

2008 MANPOWER SURVEY OF THE RETAIL TRADE

2008 年零售業人力調查

QUESTIONNAIRE

調查表

PLEASE READ THE EXPLANATORY NOTES BEFORE COMPLETING THIS QUESTIONNAIRE

填表前請詳閱附註

For official use only: 此欄毋須填寫	Rec. Type	Survey Code	Industry Code	Establishment No.	Enumerator's No.	Editor's No.	Check Digit	No. of Employees Covered by the Questionnaire
	1	3 0	4 5 6 7 8 9	10 11 12 13 14 15	16 17	18 19	20 21 22	23 24 25 26 27

NAME OF COMPANY: _____
公司名稱

ADDRESS: _____
地址

TYPE OF PRODUCTS / SERVICES: _____
產品/服務

TOTAL NUMBER OF PERSONS ENGAGED: _____
僱員總人數

NAME OF PERSON TO CONTACT: _____
聯絡人姓名 28 47

POSITION: _____
職位

TEL. NO.: _____
電話 48 55 56 63

FAX NO.: _____
圖文傳真

E-MAIL: _____
電郵 64 98

(A) Job 工作			(B) Number Employed at Date of Survey 調查時的 僱員人數	(C) No. of Vacancies at Date of Survey 調查時的 空缺額	(D) Forecast of No. Employed 12 Months from Now 預計12個月 後僱員人數	(E) Preferred Level of Education 僱員宜有 教育程度	(F) Preferred Relevant Years of Experience 僱員宜有的 相關年資
Title 職稱 (See Appendix C) (參閱附錄C)	Rec. Type	Job Code 職務編號	11 - 14	15 - 17	18 - 21	22	23
		8 - 10					
1.	2						
2.	2						
3.	2						
4.	2						
5.	2						
6.	2						
7.	2						
8.	2						
9.	2						
10.	2						

Codes
編號說明

Column (E) (E欄)

Enter in Column (E) the preferred level of education for employee according to the following codes:
請將僱員宜有的教育程度，按下列編號填入「E」欄內：

Codes Preferred Level of Education

- 編號 宜有教育程度
- 1 University Degree or above
大學學位或以上
 - 2 Associate Degree/Professional Diploma/
Higher Diploma/Higher Certificate or equivalent
副學士學位／專業文憑／高級文憑／高級證書或同等學歷
 - 3 Diploma/Certificate or equivalent
文憑／證書或同等學歷
 - 4 Matriculation 預科
 - 5 Secondary 5 中五
 - 6 Secondary 3 中三
 - 7 Others 其他

Column (F) (F欄)

Enter in Column (F) the preferred relevant years of experience for employee according to the following codes:
請將僱員宜有的相關年資，按下列編號填入「F」欄內：

Codes Preferred Relevant
Years of Experience

- 編號 宜有的相關年資
- 1 10 years or more 十年或以上
 - 2 6 years to less than 10 years 六年至十年以下
 - 3 3 years to less than 6 years 三年至六年以下
 - 4 1 year to less than 3 years 一年至三年以下
 - 5 Less than 1 year 一年以下

Please tick in the appropriate box if your company wants a complimentary copy of the 2008 Manpower Survey Report
如貴公司欲收到二〇〇八年人力調查報告贈閱版，請於方格內加上 "✓" 號。

Booklet 書冊

347

CD-ROM

348

End of Questionnaire 全卷完

Thank you for your Co-operation 多謝合作

CONFIDENTIAL

WHEN DATA ENTERED

填入數據後即成

機密文件

Appendix A

附錄A

(For companies with employment size of 5 persons or above)

公司僱員人數五人或以上

VOCATIONAL TRAINING COUNCIL

職業訓練局

2008 MANPOWER SURVEY OF THE RETAIL TRADE

2008 年零售業人力調查

QUESTIONNAIRE

調查表

PLEASE READ THE EXPLANATORY NOTES BEFORE COMPLETING THIS QUESTIONNAIRE

填表前請詳閱附註

For official use only: 此欄毋須填寫	Rec. Type	Survey Code	Industry Code	Establishment No.	Enumerator's No.	Editor's No.	Check Digit	No. of Employees Covered by the Questionnaire
	1	3 0	4 5 6 7 8 9	10 11 12 13 14 15	16 17	18 19	20 21 22	23 24 25 26 27
	1	2 3						

NAME OF COMPANY: _____

公司名稱

ADDRESS: _____

地址

TYPE OF PRODUCTS / SERVICES: _____

產品/服務

TOTAL NUMBER OF PERSONS ENGAGED: _____

僱員總人數

NAME OF PERSON TO CONTACT: _____

聯絡人姓名

28

47

POSITION: _____

職位

TEL. NO.: _____ - _____

電話

48

55

56

63

FAX NO.: _____

圖文傳真

E-MAIL: _____

電郵

64

98

Part I
第一部份

(A) Job 工作			(B) Number Employed at Date of Survey 調查時的 僱員人數	(C) No. of Vacancies at Date of Survey 調查時的 空缺額	(D) Forecast of No. Employed 12 Months from Now 預計 12個月後 僱員人數	(E) Preferred Level of Education 僱員宜有 教育程度	(F) Preferred Relevant Years of Experience 僱員宜有的 相關年資	Codes 編號說明
Title 職稱 (See Appendix C) (參閱附錄C)	Rec. Type	Job Code 職務編號	11 - 14	15 - 17	18 - 21	22	23	Column (E) (E欄)
		8 - 10						Enter in Column (E) the preferred level of education for employee according to the following codes: 請將僱員宜有的教育程度，按下列編號填入「E」欄內：
								Codes Preferred Level of Education 編號 宜有教育程度
1.	2							1 University Degree or above 大學學位或以上
2.	2							2 Associate Degree/ Professional Diploma/ Higher Diploma/ Higher Certificate or equivalent 副學士學位/專業文憑/ 高級文憑/高級證書 或同等學歷
3.	2							3 Diploma/Certificate or equivalent 文憑/證書或同等學歷
4.	2							4 Matriculation 預科
5.	2							5 Secondary 5 中五
6.	2							6 Secondary 3 中三
7.	2							7 Others 其他
8.	2							
9.	2							
10.	2							
11.	2							
12.	2							Column (F) (F欄)
13.	2							Enter in Column (F) the preferred relevant years of experience for employee according to the following codes: 請將僱員宜有的相關年資，按下列編號填入「F」欄內：
14.	2							
15.	2							
16.	2							
17.	2							Preferred Relevant Codes Years of Experience 編號 宜有的相關年資
18.	2							1 10 years or more 十年或以上
19.	2							2 6 years to less than 10 years 六年至十年以下
20.	2							3 3 years to less than 6 years 三年至六年以下
21.	2							4 1 year to less than 3 years 一年至三年以下
22.	2							5 Less than 1 year 一年以下
23.	2							
24.	2							
25.	2							
26.	2							
27.	2							
28.	2							
29.	2							
30.	2							

Note : If additional lines are necessary, please tick here and enter on supplementary sheet(s).

附註：如此頁填滿，請先將(✓)號填入此內，然後在附頁繼續填寫。

Part II
第二部份

For Full-Time Employees
全職僱員

1. Number of full-time employees in October 2007 (12 months ago).
2007年10月時 (12個月前) 的全職僱員人數。

- | | | |
|-----|--|---|
| (a) | Managerial
經理級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
8 |
| (b) | Supervisory
主任級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
12 |
| (c) | Sales Staff
售貨員 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
16 |
| (d) | Other Operative & Clerical Support
其他技術人員及文員級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
20 |

2. Number of full-time employees left in the past 12 months.
過去12個月內離職的全職僱員人數。

- | | | |
|-----|--|---|
| (a) | Managerial
經理級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
25 |
| (b) | Supervisory
主任級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
29 |
| (c) | Sales Staff
售貨員 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
33 |
| (d) | Other Operative & Clerical Support
其他技術人員及文員級 | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
37 |

For Part-time Sales/Service Staff
兼職售貨員／服務員

3. (a) Number of Part-time Sales/Service Staff in October 2007 (12 months ago).
2007年10月時 (12個月前) 的兼職售貨員／服務員人數。

42

(b) Number of Part-time Sales/Service Staff left in the past 12 months.
過去12個月內離職的兼職售貨員／服務員人數。

47

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此欄毋須填寫

Est. No. _____

ER No. _____

24

41

46

51

Training
訓練

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此欄毋須填寫

4. How many training (either internal or external*) places have you sponsored or provided to full-time employees on the following subject areas in the **past 12 months**?
過去12個月，貴機構向全職僱員提供下列項目的培訓資助或訓練（包括內部及外間*）的名額有多少？

	Full-time Managerial and Supervisory Staff 全職經理及主任級僱員	Full-time Sales, Operative and Clerical Support Staff 全職售貨員、 技術人員及文員
(a) Managerial/Supervisory Skills/ Business Management 管理／督導技巧／業務管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 52	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 55
(b) Customer Service 客戶服務	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 59	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 62
(c) Selling Skills 銷售技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 66	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 69
(d) Handling Complaints 處理投訴	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 73	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 76
(e) Interpersonal Skills 人際關係技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 80	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 83
(f) Store Operations 店舖營運	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 87	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 90
(g) Logistics/Supply Chain Management 物流／供應鏈管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 94	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 97
(h) IT and Applications 資訊科技及應用	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 101	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 104
(i) Putonghua 普通話	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 108	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 111
(j) English 英語	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 115	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 118
Others (please specify) : 其他（請說明）		
_____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 122	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 125
_____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 129	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 132

136 137

Note : * Internal training refers to an in-house training offered by the company.

附註 : * 內部訓練指由公司內部提供之訓練。

* External training refers to a training offered by an external training provider.

* 外間訓練指由公司以外的培訓機構提供之訓練。

5. How many training (either internal or external) places will you sponsor or provide to full-time employee on the following subject areas in the next 12 months?
 未來12個月，貴機構會為全職僱員提供下列項目的培訓資助或訓練（包括內部及外間）的名額有多少？

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 此欄毋須填寫

	Full-time Managerial and Supervisory Staff 全職經理及主任級僱員	Full-time Sales, Operative and Clerical Support Staff 全職售貨員、 技術人員及文員
(a) Managerial/Supervisory Skills/ Business Management 管理／督導技巧／業務管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 138	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 141
(b) Customer Service 客戶服務	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 145	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 148
(c) Selling Skills 銷售技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 152	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 155
(d) Handling Complaints 處理投訴	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 159	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 162
(e) Interpersonal Skills 人際關係技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 166	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 169
(f) Store Operations 店舖營運	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 173	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 176
(g) Logistics/Supply Chain Management 物流／供應鏈管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 180	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 183
(h) IT and Applications 資訊科技及應用	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 187	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 190
(i) Putonghua 普通話	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 194	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 197
(j) English 英語	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 201	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 204
Others (please specify) : 其他（請說明）		
_____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 208	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 211
_____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 215	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 218
	<input type="text"/> <input type="text"/> 222	<input type="text"/> <input type="text"/> 223

6. For each of the subject area, please indicate the percentage of internal and external training to be sponsored/provided in the next 12 months.

就以下各項訓練範疇，請填寫 貴機構將於未來12個月資助／提供的內部及外間培訓的百分比。

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此欄毋須填寫

	Internal 內部培訓 (%)	External 外間培訓 (%)	
(a) Managerial/Supervisory Skills/ Business Management 管理／督導技巧／業務管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 224	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 227	<input type="text"/> 230
(b) Customer Service 客戶服務	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 231	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 234	<input type="text"/> 237
(c) Selling Skills 銷售技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 238	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 241	<input type="text"/> 244
(d) Handling Complaints 處理投訴	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 245	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 248	<input type="text"/> 251
(e) Interpersonal Skills 人際關係技巧	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 252	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 255	<input type="text"/> 258
(f) Store Operations 店舖營運	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 259	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 262	<input type="text"/> 265
(g) Logistics/Supply Chain Management 物流／供應鏈管理	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 266	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 269	<input type="text"/> 272
(h) IT and Applications 資訊科技及應用	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 273	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 276	<input type="text"/> 279
(i) Putonghua 普通話	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 280	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 283	<input type="text"/> 286
(j) English 英語	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 287	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 290	<input type="text"/> 293
Others (please specify) : 其他（請說明）			
_____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 294	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 297	<input type="text"/> 300
_____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 301	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 304	<input type="text"/> 307

7. Do your company sponsor or provide training to Part-time Sales/Service Staff?
貴機構有沒有為兼職售貨員／服務員資助或提供培訓？

Yes
有

No
沒有

308

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此欄毋須填寫

8. Pre-employment training refers to training provided to people before they enter the workforce or before they are employed in a particular industry. What is your view on pre-employment training for front-line sales persons
「職前培訓」指為投身某個行業工作的人士，提供入職前訓練。你對前線銷售人員的職前培訓有何意見？

309 Pre-requisite (please go to Q. 9)
必須 (請答第9題)

310 Preferred (please go to Q. 9)
宜有 (請答第9題)

311 No comment
(End of Questionnaire. Thank you)
無意見 (問卷完，多謝合作)

312 Not necessary
(End of Questionnaire. Thank you)
無需要 (問卷完，多謝合作)

313

9. Which types of training you think a front-line sales person needs to acquire before employment

(Please tick the appropriate box of level of importance)

你認為前線銷售人員入職前須接受哪些訓練？(請按重要性✓合適方格)

	Very Important 十分重要	Important 重要	Not Very Important 不太重要	Not Necessary 無需要
(a) Customer Service 客戶服務	<input type="checkbox"/> 314	<input type="checkbox"/> 315	<input type="checkbox"/> 316	<input type="checkbox"/> 317
(b) Handling Complaints 處理投訴	<input type="checkbox"/> 318	<input type="checkbox"/> 319	<input type="checkbox"/> 320	<input type="checkbox"/> 321
(c) Selling Skills 銷售技巧	<input type="checkbox"/> 322	<input type="checkbox"/> 323	<input type="checkbox"/> 324	<input type="checkbox"/> 325
(d) Interpersonal Skills/Team Work 人際關係技巧/團隊工作	<input type="checkbox"/> 326	<input type="checkbox"/> 327	<input type="checkbox"/> 328	<input type="checkbox"/> 329
(e) Putonghua 普通話	<input type="checkbox"/> 330	<input type="checkbox"/> 331	<input type="checkbox"/> 332	<input type="checkbox"/> 333
(f) English 英語	<input type="checkbox"/> 334	<input type="checkbox"/> 335	<input type="checkbox"/> 336	<input type="checkbox"/> 337
(g) Others (please specify) 其他 (請說明)				
_____	<input type="checkbox"/> 338	<input type="checkbox"/> 339	<input type="checkbox"/> 340	<input type="checkbox"/> 341
_____	<input type="checkbox"/> 342	<input type="checkbox"/> 343	<input type="checkbox"/> 344	<input type="checkbox"/> 345

346

Please tick in the appropriate box if your company wants a complimentary copy of the 2008 Manpower Survey Report
如貴公司欲收到二〇〇八年人力調查報告贈閱版，請於方格內加上"✓"號。

347 Booklet 書冊

348 CD-ROM

End of Questionnaire
Thank you for your Co-operation

全卷完，多謝合作

The completed questionnaire will be collected by an officer from the Census and Statistics Department.
政府統計處會派員收回填妥的調查表。

2008 年零售業人力調查

附 註

1. 請填寫表內(A)至(F)欄，並在貴公司不適用的各欄內填入符號(0)。

2. (A)欄 - 職稱

(a) 請參閱附錄 C “主要職務名稱及工作說明”。表內部分職稱可能與貴公司所採用者不同；但如職務內容相同或類似，仍請歸類為同一職務，填上所需資料。

(b) 請根據主要職務把僱員分類，無需考慮其所兼任的其他職務。

(c) 如貴公司另有其他經理級人員、主任級人員或文員／輔助人員，而這些職務又需接受零售訓練，請填上有關職稱，並填寫(B)至(D)欄。

3. (B)欄 - 調查時的僱員人數

請填入每項職稱的僱員人數，包括在公司內工作的東主及合夥人。

4. (C)欄 - 調查時的空缺額

請填入貴公司現有的空缺額。「現有空缺額」指該職位仍懸空，需立刻填補而現正積極招聘人員填補。

5. (D)欄 - 預計 12 個月後僱員人數

請填入貴公司在 12 個月後將聘用的僱員人數。如估計業務屆時會擴張／收縮，此欄所填人數可多於／少於(B)欄。

6. (E) 欄 - 僱員宜有教育程度

請按下列編號，填入僱員宜有的教育程度。

<u>教育程度</u>	<u>編號</u>
大學學位或以上	1
副學士學位／專業文憑／ 高級文憑／高級證書或同等學歷	2
文憑／證書或同等學歷	3
預科	4
中五	5
中三	6
其他	7

7. (F) 欄 - 僱員宜有的相關年資

請按下列編號，填上貴機構各職務宜有的相關工作年資。

<u>相關年資</u>	<u>編號</u>
十年或以上	1
六年至十年以下	2
三年至六年以下	3
一年至三年以下	4
一年以下	5

註：調查所得資料絕對保密，只以統計摘要方式發表，絕不提及任何個別公司。

2008 年零售業人力調查主要職務名稱及工作說明

以下一些職務名稱可能與貴公司所採用者有所不同；如職務內容相同或類似，請歸類為同一職務，並在調查表填上所需資料。

編號	職稱	工作說明
經理級（包括高級及助理經理）		
111	總經理	負責機構內零售業務、採購、銷售和市場推廣所有事宜。
112	營運／零售經理	負責店舖／經銷店／連鎖店的整體營運及管理事宜。
113	分區／地區經理	負責多間店舖／經銷店（通常在同一地區內）的營運及管理事宜。
114	店舖經理	負責一間店舖／經銷店的營運及管理事宜。
115	市場推廣經理	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。
116	營業經理	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。
117	客戶服務經理	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平。

編號	職稱	工作說明
118	採購主管／經理	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。
119	物流／運輸／倉庫經理	策劃、指導和管理物流／運輸／存倉工作，確保物流順利。
120	培訓經理	策劃、指導和管理培訓事宜。按照人力計劃制訂培訓計劃，確定培訓需要，提供培訓課程，以及監察培訓成效。
198	東主／獨資經營者／ 執行合夥董事	擁有和經營業務。
199	其他經理級人員 (請說明其職稱)	
主任級 (包括高級及助理主任)		
211	店舖／分店主任	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	商品陳列主任	監督及設計櫥窗、陳列櫃或店內陳列商品的視覺效果。策劃及指導店內商品陳列。
213	物流／運輸／倉庫主任	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。

編號	職稱	工作說明
214	公共關係主任／廣告主任	策劃、推行市場推廣計劃，以擴大商品銷路及推廣公司形象。與大眾傳播媒介及廣告公司保持緊密聯絡。
215	客戶服務主任	監督、推行與客戶服務有關的工作。直接向客戶提供服務。
216	採購主任	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。
217	培訓主任	推行培訓計劃及教授課程，保存訓練記錄，以及安排有關行政工作。
299	其他主任級人員 (請說明其職稱)	
技術人員／文員級		
311	高級售貨員	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)
312	初級售貨員	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)
313	存貨／採購文員	接收、儲存與分配存貨及貨品。編製購貨訂單，並保存已購貨物的記錄。編寫和比較存貨記錄，供採購貨品之用。

編號	職稱	工作說明
314	存貨助理	收發貨品，安排儲存，添補貨倉及／或店舖貨架的存貨。
315	訂單助理（網上服務）	網上接收訂單、查核存貨量、安排運輸，及確保貨物送達目的地。
399	其他文員／輔助人員 （請說明其職稱）	
411	兼職售貨員／服務員	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。

採用人力市場分析法作人力預測(2009 至 2011 年)

方法

1. 「人力市場分析法」先審查由可靠而獨立的機構所蒐集的、可反映本地經濟、人口及勞動市場重要變動的一組主要統計數據。然後挑選一些數據，作為獨立變數，建立統計模型，推算業界的人力。換言之，模型可利用一些可靠而相關的經濟指標推算中短期的人力需求。
2. 本會已成功運用人力市場分析法，預測零售業 2002 年、2004 年及 2006 年的人力。
3. 建立統計模型包括兩大步驟。第一個步驟稱為「診斷」，透過測試兩組統計數據，挑選出獨立變數，作為決定因素。第一組數據包括香港國民經濟核算中九個核心統計數字，例如本地生產總值及其組成部分。這些統計數字能提供重要的經濟活動的資料。第二組包括 42 個經濟指標，提供不同經濟界別更分散的資料。這些資料包括消費、投資、貿易、旅遊、物業及相關活動，以及勞動市場的資料等。從這兩組數據中可找出一些決定因素。為減少第一、二組及其他數據的誤差，這些決定因素會經過統計測試，找出它們的多共線性，再歸納為主要組成部分。建立統計模型的第二個步驟稱為「預斷」，因為以主要組成部分建立統計模型後，可作人力預測之用。

零售業的人力需求預測

4. 零售業已定出七個決定因素，並歸類為主要組成部分。
 - 一、 貸款及墊款總額
 - 二、 綜合消費物價指數
 - 三、 物業價格指數(私人住宅)
 - 四、 訪港旅客人數
 - 五、 服務輸出
 - 六、 貨品出口貨量指數
 - 七、 貨品進口貨量指數

5. 由於沒有足夠的人力資料進行「預斷」步驟，本會採用經濟學上的「投入／出產模型」進行分析。「投入／出產模型」旨在量化經濟體系內不同行業之間的依存關係。在投入／出產表內，所有出產數據會分為兩類：生產(即農業、製造業及服務行業)，或最終需求(即消費或投資)。在「投入／出產模型」內，某一行業會主要投入某些資源(例如人力、資本器材)以製造產品。同時，我們假設該行業在一段短時間內(例如六個月到三年內)，生產系數固定不變(即規模收益不變)。要找出該行業需要的人力，首先要確定生產(或最終需求)與僱員人數的比率，然後才推算需投入的各項人力。這個比率稱為就業系數，代表每一個生產單位(或最終需求)所需的人力。

6. 我們以零售業的零售量指數作為業內的出產量。其後運用主要組成部分迴歸分析法預測零售業的零售量指數，再將推算指數乘以就業系數，便得出推算人力需求。

7. 根據人力市場分析法的統計模型，2009 至 2011 年零售業的推算人力需求如下：

年份	實際人力數字	推算人力數字
2008	236,371	
2009		215,560 (-8.8%*)
2010		220,526 (2.3%**)
2011		221,867 (0.6%**)
*與 2008 年實際人力數字比較的變動百分率。		
**與前一年推算人力數字比較的變動百分率。		