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STUDY ON THE MANPOWER SITUATION AND NEEDS OF THE ARTS AND CULTURAL SECTOR IN HONG KONG

THE CHINESE UNIVERSITY OF HONG KONG

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Study on the Manpower Situation and Needs of the Arts and Cultural Sector in Hong Kong

Final Report

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Executive Summary

Background

1.   Manpower in arts and culture has been a recent concern among international community as competition for talents becomes increasingly keen with the rise of the cultural and creative economy. Hong Kong is catching up with the United Kingdom, United States, Canada and Singapore in similar manpower studies for the arts and cultural sector.

2.   The objective of this study is to understand the current manpower situation and to identify development needs in the arts and cultural sector in Hong Kong through a stock-taking exercise and by collecting the views and concerns from the sector, i.e. from the arts organizations as well as the practitioners.

3.   This study is a timely effort to review and evaluate the current manpower situation and identify development needs to prepare Hong Kong as a regional hub for the global competitiveness in the cultural and creative economy.

Research framework and methodology

4.   This study adopts the definition used in the consultancy brief to categorize the arts and cultural sector into 4 sectors and 13 sub-industry groups: namely i) Performing Arts covering music, dance, theatre, Chinese opera (xiqu), western opera, and performing arts not elsewhere classified; ii) Visual Arts covering fine arts such as painting, sculpture and print making; iii) Museum and Cultural Services covering museums, art galleries, libraries and archives; iv) Cross-industry Cultural Services covering arts administration, arts criticism and arts education. The categorization of 28 occupations adopted in the survey is set out at the Annex.

5.   This study provides analyses from the findings gathered through questionnaire surveys, focus groups and consultative interviews. There are two questionnaire surveys – one for the arts employers and the other for the arts practitioners – which enumerated 536 organizations and 1,018 arts practitioners from April to July in 2009. Five focus groups have been conducted for the four sectors individually with one for all sectors, engaging a total of 44 arts and cultural practitioners and/ or organizational representatives; and 28 face-to-face consultative interviews, with at least 2 interviews for each sub-industry, have also been conducted from April to September in 2009.

6.   It should be noted that 'arts organizations' referred to in this study are those that claim their activities lie within the categories as put forward in Para. 4 above. In order to differentiate the manpower situation as reflected by the arts organization survey from the arts practitioner survey, this report will name the workforce from the arts organizations survey as 'arts employees' while those from the arts practitioner survey contacted through the enumerated arts organizations, 'arts practitioners'.

Research objectives

7.   The objectives of the study as outlined in the consultancy brief are:

- To stock-take the present situation of individual industry and sub-industry groups;

- To identify the development needs of the individual industry groups as well as the existing channels that cultivate the requisite personnel;

- To collect and analyse the views and perceptions of employers;

- To conduct industry group analyses to find out the various factors that contribute to changes in the sector's manpower requirement and supply;

- To collect and analyse the views and perceptions of arts practitioners;

- To make recommendations on the basis of study findings.

8.   In more general terms, this study aims to provide answers to the following questions regarding manpower in arts and culture:

- Who are they? – definitions and characteristics of arts organizations and practitioners;

- What do they do? – occupation, work patterns and engagement modes;

- How much do they earn? – salary and freelancing income, voluntary work;

- Which jobs are suitable for whom? – education, qualifications and training;

- What and when are the prospects? – vacancy, recruitment, career and professional development.

Summary of findings

Number of organizations and persons engaged

9.   By the end of 2009, there were a total of 66,350 arts employees' jobs filled by an estimated number of 40,176 persons [1] in the arts and cultural sector, employed by an estimated 5,976 business establishments or organizations representing 1.9% of total number of establishments in Hong Kong. On average, one organization had about 11 arts employees.

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[1] The number of arts employees' jobs is derived from the arts organizations survey. The total number of arts employees' jobs is the sum of full-time, part-time and freelance jobs which amounts to 66,350 (rounded off from the actual sum of 66,348). However, since one person can have more than one job at a time, the number of persons engaged (which is different from the total number of arts employees' jobs above) is estimated by adding the number of full-time jobs and the estimated number of persons engaged in part-time and freelance jobs, which amounts to 40,176.

(a) Occupations	(b) Organizations employing arts employees of occupation under column (a)*		(c) Arts employees of occupation under column (a)		
	Number	As % of total no. of organizations	Number	%	Average no. of employees of occupation under column (a) in each organization
a) Writers and editors	371	6.2%	3 280	4.9%	9
b) Graphic designers	485	8.1%	1 543	2.3%	3
c) Interior designers	18	0.3%	31	0.0%	2
d) Originators and compositors[2]	192	3.2%	494	0.7%	3
e) Painters and sculptors	201	3.4%	464	0.7%	2
f) Photographers	281	4.7%	477	0.7%	2
g) Producers and directors	119	2.0%	229	0.3%	2
h) Other visual artists	249	4.2%	837	1.3%	3
i) Handicraft and printing workers	1 525	25.5%	5 910	8.9%	4
j) Actors and dancers	224	3.7%	10 308	15.5%	46
k) Performers and singers	429	7.2%	4 701	7.1%	11
l) Other performers	249	4.2%	10 304	15.5%	41
m) Conductors, composers, arrangers and lyricists[3]	332	5.6%	846	1.3%	3
n) Choreographers	117	2.0%	221	0.3%	2
o) Theatre, fashion, exhibit and other creative designers	186	3.1%	2 262	3.4%	12
p) Production and operation managers	198	3.3%	448	0.7%	2
q) Production assistants	232	3.9%	741	1.1%	3
r) Musical instrument tuners	131	2.2%	313	0.5%	2
s) Arts critics	26	0.4%	121	0.2%	5
t) Arts and cultural managers	1 341	22.4%	6 882	10.4%	5
u) Arts educators and trainers	1 757	29.4%	12 755	19.2%	7
v) Librarians	88	1.5%	1 080	1.6%	12
w) Conservators and curators	43	0.7%	507	0.8%	12
x) Archivists	30	0.5%	123	0.2%	4
y) Library or museum technicians	19	0.3%	94	0.1%	5
aa) Library or filing clerks	26	0.4%	1 375	2.1%	52
All occupations	**5 976**	**100.0%**	**66 348**** **100.0%**		**11**

*Multiple answers were allowed

** Owing to rounding, there may be a slight discrepancy between the sum of individual items and the total.

Figure 1: Number of arts organizations employing arts employees, number of arts employees employed by arts organizations and average number of arts employees employed by each arts organization, analyzed by occupation (with the top three in each column highlighted). Base: 5,976 organizations for percentages under column (b); 66,348 arts employees for percentages under column (c).

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[2] Originators and compositors are print-related occupations. They put together the images, illustrations and text to make the file ready to print. Their job involves scanning and touching-up images, converting files from different formats to the file type specified by the printer, etc.

[3] "composers" refers to "song composers" only

Arts organizations by sector

10.   The majority of organizations were involved in visual arts and performing arts.

11.   The categorizations of these organizations were not always clear cut. About 20% of them were involved in more than one sector.

12.   Over 50% of organizations indicated that the level of business had not changed for the four types of activities, i.e. businesses related to performing arts; visual arts; library, museum and cultural services; and other services respectively.

Size of organizations

13.   In general, arts and cultural organizations were predominantly small in size.

14.   The largest group of arts employees working in small organizations was actors and dancers; and the largest group of arts employees working in medium and large organizations was educators and trainers.

15.   Small organizations hired more freelancers than medium and large organizations while large organizations hired more full-timers than the others.

Financing mode of Organizations

16.   Private organizations and their manpower demand were mainly driven by the market.

17.   Private organizations were predominantly small. There were relatively more medium and large public organizations.

18.   The most dominant occupation among public organizations was conservators and curators. There were more actors and dancers in private organizations and more arts educators and trainers in subsidized organizations.

19.   Public organizations hired more full-time staff while private organizations hired more freelancers. Subsidized organizations employed a roughly equal amount of full-time staff and freelancers.

Profile of arts practitioners

20. The average age of arts practitioners was about 36 with the male to female ratio roughly 4:6.

21. The majority of arts practitioners were born in Hong Kong.

22. For the arts practitioners that were not born in Hong Kong, the great majority of them had been residing in Hong Kong for 7 years or more.

Occupations of arts employees

23. The overall number of arts employees engaged as arts educators and trainers, actors and dancers and other performers was higher.

24. Arts educators and trainers was the largest group of arts employees employed by about 29% of organizations.

25. Library or filing clerks had the highest average number employed in one organization.

Qualifications of full-time and part-time employees

26. About 47% of arts employees were university graduates; about 22% have attained technical/ vocational, non-degree, post-secondary education and about 31% have attained secondary education or below.

27. Arts educators and trainers were among the most educated and they represented about 49% of all arts employees who had university degrees.

28. There were relatively more university graduates in large than small organizations. 69% of arts employees working in large organizations had university degrees while only 28% working in small organizations had attained the same level.

Mode of Employment

29. About 36% of the arts employees were employed on a full-time basis, about 14% were employed on a part-time basis and about 50% were freelancers.

30. Occupations with the highest proportion of full-time staff were library and museum technicians; conservators and curators; and librarians.

31. Occupations with the highest proportion of freelance staff were other performers; theatre, fashion, exhibit and other creative designers; and actors and dancers.

32. Occupations with highest average number of arts employees for full-time employment in an organization were library or filing clerks; conservators and curators; and librarians.

33. For part-time employment, the top three occupations in terms of average number of arts employees in an organization were library or filing clerks; actors and dancers; and arts educators and trainers.

34. For freelancers, the top three occupations in terms of average number of arts employees in an organization were actors and dancers; arts and cultural managers; and other performers.

Work pattern

35. Arts practitioners worked for 41.4 hours a week on average for their main employers in the past 12 months. In addition, they worked for 12.8 hours a week on average for 5 other arts and cultural organizations.

36. About 16% of arts practitioners spent more than 60% of their time on archiving and preserving and about 11% of them spent more than 60% of their time on education and training.

37. More than half of arts practitioners had been working as arts practitioners for 6-20 years.

38. The majority of arts practitioners worked in Hong Kong in the past 12 months and spent almost 99% of their time working in Hong Kong.

39. For arts practitioners who had worked in Mainland China, they spent on average 11% of their time working there. For those who had worked in Macau, they spent about 3% of their time working there.

Pay and salaries

40.   Almost 30% of all full-time and part-time employees earned $10,000 per month or less, 1/4 of them earned between $10,001 and $15,000 per month and another 1/4 earned $15,000 per month or more[4].

41.   The salary level was on average higher for conservators and curators; theatre, fashion, exhibit and other creative designers; interior designers; and art critics.

Fee structure

42.   The great majority of arts practitioners indicated that they charged a definite fee structure.

43.   On average, arts practitioners charged higher for their services related to education and training ($242.1 per hour), hosting exhibition and performances ($191.6 per hour) and creation of contents or ideas ($189.7 per hour).

44.   Compared with the rates they charged three years ago, about 38% of arts practitioners indicated that their current hourly rate had increased or increased significantly. About half of them indicated that the rates they charged had remained unchanged.

Vacancies and turnover

45.   The total number of vacancies in the arts and cultural sector at the time of study was 9,396.

46.   Writers and editors had the largest number of full-time vacancy, arts educators and trainers had the largest number of part-time vacancy and theatre, fashion, exhibit and other creative designers had the largest number of freelance vacancy.

47.   From the focus groups and interviews, it was expressed that smaller organizations had higher turnover rate - instability was more acute especially amongst organizations receiving one-year grant from the Arts Development Council.

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[4] About 20% of organizations refused to answer the average monthly salary of their full-time and part-time arts employees.

48.	Employers from interviews expressed that shortage in manpower for the creative jobs was in general less acute than in the art administration and programming as well as technical jobs.

Continuing professional development and training for full-time and part-time employees

49.	About 42.6% of organizations which had employed full-time and/or part-time arts employees indicated that their arts employees had undertaken some kinds of training or professional development programmes.

50.	On-the-job training was the most common form of continuing professional development in the arts and cultural sector. For arts organizations with arts employees who had undertaken training or professional development programmes, about 40.9% of organizations had arranged on-the-job training for their arts employees.

51.	Organizations of higher proportion with no training or professional development were interior designers, other performers and production and operation managers.

52.	Organizations of lower proportion with no training or professional development were conservators and curators, library or museum technicians and production assistants.

Training arranged by own organizations

53.	Types of own training [5] -

structured training courses: most common among performers and singers (43.8%), library or filing clerks (32.7%), conductors, composers, arrangers and lyricists (32.5%).

workshop and seminars: most common among library or filing clerks (65.5%), producers and directors (57.0%), and writers and editors (38.9%).

apprenticeship: most common among musical instrument tuners (50.0%), other visual artists (48.9%) and originators and compositors (37.5%).

on-the-job training: most common among library or filing clerks (100.0%), theatre, fashion, exhibit and other creative designers (96.7%) and actors and dancers (83.4%).

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[5] Base of the percentages in brackets in paragraphs 53 and 54 is the number of interviewed arts organizations with arts employees of the occupation concerned who had undertaken training or professional development programmes.

Training arranged by other organizations

54.   Types of training by others -

structured courses: most common among arts critics (100.0%), choreographers (82.4%), and archivists (68.0%).

arranged but not subsidized their staff to attend structured courses conducted by other organizations: most common among librarians (39.2%), production assistants (36.5%) and conductors, composers, arrangers and lyricists (29.1%).

arranged their staff to attend workshops or seminars organized by other organizations: most common among production and operation managers (29.3%), originators and compositors (28.0%) and producers and directors (26.6%).

Recruitment

55.   Over 90% of organizations did not have any need or difficulty in recruiting staff in the past three years. However, from the respondents in the consultative interviews, the commercial gallery sector envisaged the need to recruit 40% more staff in the foreseeable future.

(a) Occupations	(b) No. of organizations with full-time/part-time arts employees of occupation under column (a)*	(c) Educational requirement for new recruits of occupation under column (a) * (No. of organizations)					
		Secondary or below		Technical/ vocational, non-degree		University education, degree	
		Number	%	Number	%	Number	%
a) Writers and editors	317	38	2.3	61	5.2	208	11.6
b) Graphic designers	388	117	7.1	149	12.6	162	9.0
c) Interior designers	2	-	0.0	-	0.0	2	0.1
d) Originators and compositors	177	50	3.0	80	6.8	17	0.9
e) Painters and sculptors	148	-	0.0	-	0.0	34	1.9
f) Photographers	196	40	2.4	3	0.3	1	0.1
g) Producers and directors	60	19	1.1	11	0.9	31	1.7
h) Other visual artists	174	17	1.0	20	1.7	84	4.7
i) Handicraft and printing workers	1 491	725	43.8	50	4.2	33	1.8
j) Actors and dancers	99	32	1.9	17	1.4	14	0.8
k) Performers and singers	188	-	0.0	68	5.8	67	3.7
l) Other performers	14	12	0.7	2	0.2	-	0.0
m) Conductors, composers, arrangers and lyricists	253	38	2.3	43	3.6	15	0.8
n) Choreographers	60	3	0.2	3	0.3	6	0.3
o) Theatre, fashion, exhibit and other creative designers	96	20	1.2	17	1.4	17	0.9
p) Production and operation managers	140	47	2.8	10	0.8	14	0.8
q) Production assistants	114	38	2.3	12	1.0	7	0.4
r) Musical instrument tuners	53	16	1.0	12	1.0	-	0.0
s) Arts critics	12	-	0.0	-	0.0	12	0.7
t) Arts and cultural managers	1 324	138	8.3	212	18.0	466	26.0
u) Arts educators and trainers	1 638	368	22.2	546	46.2	790	44.0
v) Librarians	88	23	1.4	26	2.2	48	2.7
w) Conservators and curators	43	-	0.0	12	1.0	31	1.7
x) Archivists	30	8	0.5	20	1.7	25	1.4
y) Library or museum technicians	19	11	0.7	3	0.3	1	0.1
aa) Library or filing clerks	26	5	0.3	5	0.4	17	0.9
All occupations	**5 668**	**1 657**	**100.0**	**1 181**	**100.0**	**1 794**	**100.0**

* Multiple responses allowed

Figure 2: Educational requirement for full-time and part-time new recruits, analyzed by occupation of arts employees (with the top three in each column highlighted). Base: Secondary or below: 1 657 organizations / Technical/ vocational, non-degree: 1 181 organizations / University: 1 794 organizations.

56.   Occupations with difficulties to recruit –[6]

lack relevant experience: most common for conservators and curators (100.0%), library or filing clerks (100.0%) and library or museum technicians (100.0%).

did not undertake relevant education or training: most common for library or museum technicians (100.0%), conservators and curators (82.8%) and theatre, fashion, exhibit and other creative designers (79.7%).

lack enthusiasm for arts: most common for production assistants (89.4%), producers and directors (49.8%) and conductors, composers, arrangers and lyricists (42.9%).

unwillingness to accept salaries: most common for production and operation managers (82.2%), choreographers (73.2%) and musical instrument tuners (44.3%).

unwillingness to work full-time: most common for other performers (63.9%) and archivists (57.4%).

Concerns and expectations from the employers

57.   From the focus groups and interviews, employers expressed concerns about shortage of middle management and senior professionals with all-round skills.

58.   They also expressed concerns about short-term funding, budding arts groups, financial planning, the quality of practitioners, the relatively late start of training for performers, the lack of general education, overseas network and outreach programmes.

59.   They advocated recruiting workers with passion for the arts and with both artistic and business senses, recruiting more arts educators and trainers, critics, curators, administrators and technical staff. Besides, they pointed out the importance of proper matching of expectations in qualifications from both employers and practitioners.

60.   Employers also believed that there was limited and insufficient continuing professional development for the sector. Besides, they noted the importance of multi-tasking and learning on the job, and expressed that the attitude of the commercial sector regarding arts and cultural managers was that they were less adaptable to the commercial environment.

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[6] Base on the organizations that have difficulty in recruiting staff by occupations, the corresponding percentage of reasons were calculated.

Concerns and expectations from the practitioners

61.   Practitioners expressed concerns about the difficulty to retain talents due to low salary, the lack of respect and social status, low esteem and recognition from funding bodies as well as inadequate expertise to measure artistic excellence.

62.   They blamed the current education for the lack of an art and cultural ecology – with limited arts and cultural elements in school curriculum as well as inter-disciplinary training in university education. They exhorted the need to connect educational sectors with the community and the importance of internship.

63.   For the museum and cultural services sector, practitioners wanted more training for curators, more short-term diploma programmes and more medium-sized organizations to practice their skills.

64.   For the visual arts sector, they wanted more art mediators, alternative art space with low rental and less institutionalized training.

65.   For the performing arts sector, they believed it was difficult to recruit quality local artists. Besides, there was lack of prospects for opera singers and groups, musical theatre and street performers. They wanted more linkages between the profession and the HKAPA as well as more optimal usage of public performing arts venues.

66.   For the cross-industry cultural services, they pointed out that arts education was often regarded as secondary to other major subjects in schools and training in performing arts should start early. Besides, they noticed the shortage of technical staff and also the vulnerability of art criticism as a profession.

Factors affecting manpower needs and supply

67.   Both employers and practitioners regarded birth rate, population growth, integration with the Mainland market, salary level and the percentage of new initiates as the fundamental factors in manpower development.

68.   Lamenting that some of the best talents had already moved to the Mainland, they noted the increase of audience from Mainland China for local production and argued for expanding the market with more touring and collaboration, more support on local production and audience development, links to overseas institutions and the opportunity to do something with the new academic structure for senior secondary schools and tertiary education.

69.   They noted the high demand for arts educators and trainers, the likely increase in IT manpower, the lack of experienced staff for large exhibition and performing venues and advocated outsourcing, cross-sector production and integration of different art forms.

70.   They wanted more private sponsorship and patronage and also regular monitoring of the manpower situation and needs.

WKCD and its impact on the Arts and Cultural sector in General

71.   Regarding the WKCD, the sector on the whole welcomed its development but also worried that there would not be enough workers for the sector as a whole.

72.   They also worried that the local arts groups and community could not benefit from the WKCD development.

73.   They argued that WKCD should be rooted in local research, not weaken existing district-based cultural infrastructure and should provide outreach programmes and alternative spaces for local art and cultural development.

Overall arts and cultural development

74.   They saw the need of training and internship in venue support, "group performance" and new expertise in new media and cross-disciplinary work.

75.   The sector thought it important to establish an ecology to nurture talents, develop local leadership, pursue legislation for museum, review standards of performing programs and remuneration.

76.   The sector also argued for more arts and cultural publications, statistics and research, the need of a separate government bureau to look after culture, alignment and coordination across departments when necessary, and an alternative system for administration other than civil servants.

77.   They also suggested support in fund-raising, marketing and audience building; more corporate support with tax incentive schemes and 'percent-for-art' programmes.

Recommendations

78.   To improve recognition and reward for arts and cultural practitioners;

79.   To review and improve the pay and salaries for arts and cultural practitioners;

80.   To establish a stable and long-term funding system for a more sustainable development for artistic careers;

81.   To devise comprehensive recruitment strategies for the arts and cultural sector;

82.   To develop clear qualifications and standards for manpower development in the arts and cultural sector;

83.   To improve the education to meet manpower needs and increase manpower supply in the arts and cultural sector;

84.   To provide adequate training for the manpower in the arts and cultural sector;

85.   To create the culture and environment for a sustainable manpower demand and supply.

Annex: The categorization of 28 occupations adopted in the survey

1. Writers and editors
2. Graphic designers
3. Interior designers
4. Originators and compositors [7]
5. Painters and sculptors
6. Photographers
7. Producers and directors
8. Other visual artists
9. Handicraft and printing workers
10. Actors and dancers
11. Performers and singers
12. Other performers
13. Conductors, composers, arrangers and lyricists
14. Choreographers
15. Theatre, fashion, exhibit and other creative designers
16. Production and operation managers
17. Production assistants
18. Musical instrument tuners
19. Arts critics
20. Arts and cultural managers
21. Arts educators and trainers
22. Librarians
23. Conservators and curators
24. Archivists
25. Library or museum technicians
26. Library or filing clerks
27. Apprentices
28. Others

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[7] Originators and compositors are print-related occupations. They put together the images, illustrations and text to make the file ready to print. Their job involves scanning and touching-up images, converting files from different formats to the file type specified by the printer, etc..