

Research Report

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The 2001 Survey on the Demand of Continuing Education in Hong Kong



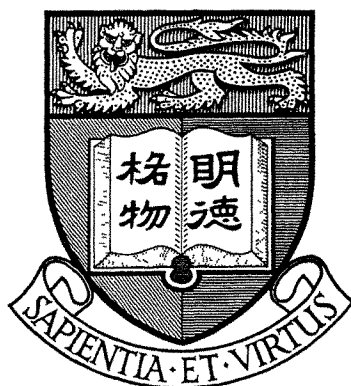
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I. Background

A survey on the demand of continuing education in Hong Kong was conducted by the School of Professional and Continuing Education, The University of Hong Kong, during the period from 12 to 26 February 2001. Random telephone calls were made to households, and interviews were conducted over the phone. A total of 1,140 persons of age 18 or above were successfully interviewed.

The questionnaire used in the present survey is basically modeled on the one used in the April 1999 Survey (*SPACE Research Report No. 3, July 2000*), although modifications have been made to include some new perspectives. Whenever possible, comparisons with the 1999 survey are made in the following summary of results.

The response rate of the present survey is 51.2%. As a comparison, the response rate of the 1999 survey was 53.7%.

II. Information on Recent Participation

1. Rate of Participation

Table 1

No. of respondents: 2001 – 1,140 1999 – 542		
	<u>2001</u>	<u>1999</u>
Attended courses within past 12 months	21.7%	20.7%

It can be seen that the participation rate in early 2001 is roughly the same as that in early 1999. The conclusion is that, in the past two years at least, every one out of five adults in Hong Kong have been engaged in continuing education of one type or another. Although significant, this figure still falls short of those in more advanced countries. The average figure in say, OECD countries, is more like 40%, and in some cases, more than 60%.

The total number of Hong Kong people who had attended continuing education courses in the 12 months preceding the survey can be estimated by multiplying the participation rate of 21.7% by the latest population of those aged 18 or above in Hong Kong. According to the latest statistics from the 2001 Population

Census released by the government in October 2001, this population is 5,333,610. The population engaged in continuing and professional education (CPE) during the period from March 2000 to February 2001 is thus estimated to be

$$5,333,610 \times 21.7\% = 1,157,393 \text{ or say, } \mathbf{1.16 \text{ million}}$$

However, a closer look at the age profile of the learners reveals that only 2.4% of the learners were aged 60 or above. This is much *lower* than the percentages of the higher age groups in the general population as revealed by the 2001 Census (aged 55 or above: 18.6%; aged 65 or above: 11.1%). As a result, the above figure of 1.16 million is reckoned to be an *over-estimation* of the number of adult learners in Hong Kong.

An alternative is to use the working population of Hong Kong as the base figure. The 2001 Census gives a figure of 3,437,992 for this population circa early 2001. The number of participants in CPE is thus estimated to be

$$3,437,992 \times 21.7\% = 746,044, \text{ or say, } \mathbf{0.75 \text{ million}}$$

This is believed to be a more reasonable estimate. The same method was in fact used in the 1999 survey report. Using a working population of 3.2 million as determined by the 1996 By-Census, the number of CPE participants in early 1999 was

then estimated to be around *0.66 million*.

2. Expenditure on Continuing Education

Table 2

No. of respondents: 2001 – 187 1999 – 101		
	<u>2001</u>	<u>1999</u>
The average fee of the entire programme attended by each respondent	<i>HK\$19,765</i>	<i>HK\$14,052</i>

The figures show a 40% increase in the average fee of the programmes attended. This is either due to increase in programme fees, or a shift by the learners to higher-level (and therefore more expensive) programmes. The latter postulate is supported to a certain extent by the figures in Table 3 below. (Note the explanatory remark below Table 3 though.)

Multiplying this fee with the "learners' population" as estimated in Section 1 above, the volume of trade in CPE in Hong Kong is estimated to be

HK\$ 19,765 x 746,044 = HK\$ 14.745 billion,
or say, **HK\$ 14.7 billion**

Please note that this is only the *estimated volume of trade* rather than the *annual expenditure* on continuing education. This is because the respondents were only asked the *total fee of the programme* which they had attended or are attending, and the programme in question may span more than a year. The reason why the total expenditure over the past 12 months was not asked is that the amount may not be easy to calculate. Respondents would then have to make mental computations/estimations over the phone, and the resulting figures are liable to substantial error.

3. Level of Courses Attended

Table 3

No. of respondents: 2001 – 247 1999 – 112		
<u>Level</u>	<u>Percentage of respondents</u>	
	<u>2001</u>	<u>1999</u>
Short courses	29.6	40.0
Certificate/Diploma courses	32.4	40.8
		(To be Cont'd)

(Cont'd)

<u>Level</u>	<u>Percentage of respondents</u>	
	<u>2001</u>	<u>1999</u>
Bachelor degree	7.7	8.2
Professional Certificate/Diploma	21.5	4.5
Postgraduate degrees (e.g. Master)	7.3	4.5

Note: The substantial difference between the 2001 and 1999 figures in the "Professional Certificate/Diploma" category may be due to the fact that the term "專業資格課程" (professional qualifications programmes) was used in 1999, while the slightly different term of "專業證書/文憑課程" (professional cert/diploma programmes) is used in 2001.

The overall picture seems to be that people are pursuing more award-bearing courses which would be useful for their career development, at the expense of short courses, which are mainly taken for interest and personal development. Note also the lack of growth in the popularity of Bachelor degree programmes, and the slight increase in the popularity of postgraduate degree programmes.

4. The Most Popular Subjects

Table 4

No. of respondents: 2001 – 247 1999 – 112		
<u>Types of courses</u>	<u>Percentage of respondents</u>	
	<u>2001</u>	<u>1999</u>
Computer	23.5	25.0
[IT/e-commerce]	2.4	N/A
Languages (incl. translation)	17.8	16.1
Business Management	14.2	19.6
Engineering	4.5	2.7
Accounting	4.0	4.5
Secretarial Skills	4.0	4.5
Real Estate, Urban Planning, Architecture, Construction, etc.	4.0	N/A
[Architecture]	N/A	0.9]
Applied Sciences (incl. Math., Nutrition, Librarianship, etc)	3.6	N/A
Literature, History & Philosophy	3.6	N/A
Education	2.8	6.3

Note: Some figures for 1999 are not available because of the differences in the categorisation of course types.

The figures which are available for comparison are in general the same as those in the 1999 survey.

5. Evaluation of Courses attended by respondents in the past 12 months

Table 5

No. of respondents:	2001 – 247	
	1999 – 112	
	<u>Percentage of respondents</u>	
<u>Rating</u>	<u>2001</u>	<u>1999</u>
Very good	7.7	11.7
Good	49.8	45.9
Fair	37.7	39.6
Poor	2.4	0.9
Very poor	0	1.8
No Comment	2.4	0.9

The figures are in general the same as those in the 1999 survey, especially if we group the "Very good" and "Good" categories together, as well as the "Poor" and "Very poor" categories together.

6. The Providers

It is found that a full 41.3% of the programmes undertaken by the participants were offered by members of the Federation for Continuing Education in Tertiary Institutions, which consists of the eight universities plus the Hong Kong Institute of Education, Vocational Training Council and Caritas. The share of the eight universities alone was around 28%.

The remaining 59% of the programmes undertaken were offered by a large variety of providers. The more notable ones are Federation of Trade Unions (8.1%), Hong Kong Management Association (2.4%) and Employee Re-training Board (2.0%) In-house company training also accounted for 4.5% of all the programmes undertaken.

7. Degree of Employer Support

When asked whether they had received any form of support in their studies from their employers, around **25%** replied in the affirmative. The forms of support are broken down as follows:

Financial subsidy	19.8 %
Granting of leave	3.6 %
Both of the above	2.4 %

Other forms of support 1.2 %

This reveals that employers are more ready to give financial subsidies instead of granting leave to employees for undertaking study programmes. This is roughly in line with the findings of another recent survey, also conducted by SPACE in early 2001, on the status of human resources development in the private sector of Hong Kong. (Please see *SPACE News*, Issue No. 8, p.12)

On the other hand, it is notable that 14.1% of the participants did not let their employers know about their studies, probably for fear that this would arouse resentment from their employers.

III. Information on Future Participation

1. Plans for Future Participation

Table 6

No. of respondents: 2001 – 1,140 1999 – 542		
	<u>Percentages</u>	
	<u>2001</u>	<u>1999</u>
Percentages of respondents planning to study in the year ahead	30.6%	24.1%

2. Budget for Future Participation

Table 7

No. of respondents: 2001 – 268 1999 – 98		
	<u>2001</u>	<u>1999</u>
The average amount of money each respondent is prepared to spend on continuing education in the year ahead	<i>HK \$9,910</i>	<i>HK \$12,054</i>

The results in Tables 6 and 7 above, together with the figures as listed in Table 1 and 2, are the most significant findings of the 2001 survey.

The figures can be looked at from several angles. First, we note that comparing with the answer in the 1999 survey, the percentage of respondents who had plans to study in the year ahead has increased by $(30.6 - 24.1) = 6.5$ percentage points. In terms of proportion, the increase is even more significant i.e. $[(30.6 - 24.1)/24.1] \times 100\% = 26.97\%$. This is good news for Hong Kong in general (as more people are going to upgrade their knowledge and skills), and for the CPE providers in particular (as the market demand will increase).

The word of caution here is that if we compare the 1999 figure in Table 6 with the 2001 figure in Table 1, we can see that although the self-projected participation rate for the year ahead [validity period May 1999 to April 2000] was 24.1%, the actual participation rate for the period January 2000 to February 2001 (as revealed in the 2001 survey) was only 21.7%. Although the validity periods are not exactly coincident (only with 4 to 5 months overlap), the figures raise the possibility that *the actual participation may turn out to be lower than the self-projected participation rate*. This is understandable since some people may not be able to carry out their planned studies due to various practical reasons.

There is of course the possibility of opposite cases in which people with no previous plans of studies may suddenly decide to study. But if we reckon that the first type of cases would be more likely (partially supported by the figures mentioned in the above paragraph), then the self-projected participation rate of 30.6% as listed in Table 6 have to be taken with a pinch of salt i.e. it may be an over-estimation of the subsequent, actual participation rate.

The next interesting things are the budgets and actual expenditure in CPE. As mentioned earlier, the figures in Table 2 show that the actual expenditure on continuing education over the two years from early 1999 to early 2001 has increased by 40%. On the other hand, however, the figures in Table 7 show that the projected expenditure has decreased from \$12,054 in 1999 to \$9,910 in 2001, representing a drop of 18%. Coupled with the figures in Table 1 on participation rates, this means that more people are prepared to undertake continuing education courses, *but the money they are prepared to spend has shrunk*. These findings are consistent with the observations that

- (1) With the economic downturn in Hong Kong following the 1997 Asian financial meltdown, people's spending power as well as the propensity to spend has decreased considerably.
- (2) With the economic downturn and the re-structuring of Hong Kong's economy (mainly towards a high value-added service/

knowledge economy), people increasingly feel the need to upgrade their knowledge and skills in order to maintain/improve their competitiveness in the job market.

Combining the figures in Tables 6 and 7, a forecast expenditure on continuing education for the period from March 2001 to February 2002 can be calculated:

$$3.438 \text{ million} \times 30.6\% \times \$ 9,910 = \$ 10.425 \text{ billion,}$$

or say, **HK\$ 10.4 billion**

The conclusion is that, roughly speaking, continuing education is *a ten billion dollar business* (in terms of annual expenditure) in Hong Kong. For comparison, a figure of around 9 billion dollars was arrived at in the 1999 survey. (SPACE Research Report No.3. P. 26-27)

(This is of course a very rough estimation. Note that the 30.6% is based on 349 out of 1,140 respondents answering positively to the question on future study, while the \$ 9,910 expenditure is only averaged from 268 - and not 349 - respondents who chose to give an answer.)

3. Types of Courses to be selected for Future Participation

Table 8

No. of respondents: 2001 – 349 1999 – 123		<u>Percentages</u>	
<u>Types of Courses</u>	<u>2001</u>	<u>1999</u>	
Computer	33.5	27.6	
[IT/e-commerce	5.2	N/A]	
Languages (incl. Translation)	22.1	19.5	
Business Management	13.2	13.0	
Accounting	4.6	7.3	
TCM	3.4	3.3	
Art & Design	3.2	3.2	
Engineering	2.6	3.3	
Education	2.3	3.3	
Literature, History & Philosophy	2.0	0.8	
Construction, Real Estate, Architecture & Urban Planning	1.1	N/A	
[Architecture	N/A	0.8]	
Law	0.9	2.4	

This table provides valuable market information as to what types of programmes the potential learners are interested in. It can be seen that the three subject-domains "Computer", "Language" and "Business Management" are still way ahead of the others in terms of popularity. On the other hand, drops in popularity are observed for subjects such as Accounting and Law.

4. Academic Qualifications to be pursued

Table 9

No. of respondents: 2001 – 1,140	
The preferences of academic qualifications in case the respondents (1,140 in total) are to undertake continuing education courses in the future:	
<u>Academic Qualification</u>	<u>Percentage</u>
Non-award bearing	24.2
Certificate of attendance	11.2
Advanced certificate/diploma	1.5
Associate degree	9.4
Bachelor degree	5.3
Master degree	0.9
(To be cont'd)	

<i>(Cont'd)</i>	
<u>Academic Qualification</u>	<u>Percentage</u>
Professional certificate/diploma	<i>24.3</i>
Postgraduate diploma	<i>1.9</i>
Don't know / Hard to tell	<i>19.6</i>
Refused to answer	<i>1.8</i>
Total	<i>100.0</i>

Again, this table provides valuable information on the levels of education which the potential learners are keen to pursue. The high percentage for the "Professional certificate/diploma" level is consistent with the finding as presented in Table 3. This is certainly an area of great potential development.

Another interesting point to note is the intention for pursuing Associate degree. Although at the time of the survey, the Associate degree is still a brand new programme which has been launched for only half a year, the response shows that nearly one out of ten respondents expressed their interest in pursuing this type of award. This indicated that this new type of award is meeting a definite social demand. (The finding ties in with the fact that when the programme was first advertised by HKU SPACE in the summer of 2000, more than 6,000 applicants competed for a planned intake of around 600.)

5. Preferred Mode of Study

Table 10

<u>No. of respondents:</u> 2001 – 1,140	
The preferences of the major mode of study in case the respondents (1,140 in total) are to undertake continuing education courses in the future:	
<u>Preferred Mode of Study</u>	<u>Percentage</u>
Face-to-face	61.2
Distance learning – via correspondence	8.9
Distance learning – via the Internet	5.4
Self-study	4.6
Practices	6.6
Exchange scheme	2.3
(Studying abroad	1.1)

Although this question was not asked in the 1999 survey, a survey among the graduates of The University of Hong Kong carried out in August 2001 revealed a very similar preference for face-to-face teaching (64.4%), and the rather low acceptance of online learning as a major mode of programme delivery (0.8%).

IV Profiles of the Respondents

1 Age Profiles of Past and Prospective Participants

A wealth of information are contained in the following sections. These include the profiles of

- (i) all respondents,
- (ii) all past participants, and
- (iii) all prospective participants

in terms of

- (a) age,
- (b) gender,
- (c) education level, and
- (d) income level.

In addition, the *participation rates* (both actual and anticipated) of each sub-group in all four of the above categorisations (i.e. (a) to (d) above) are analysed and presented.

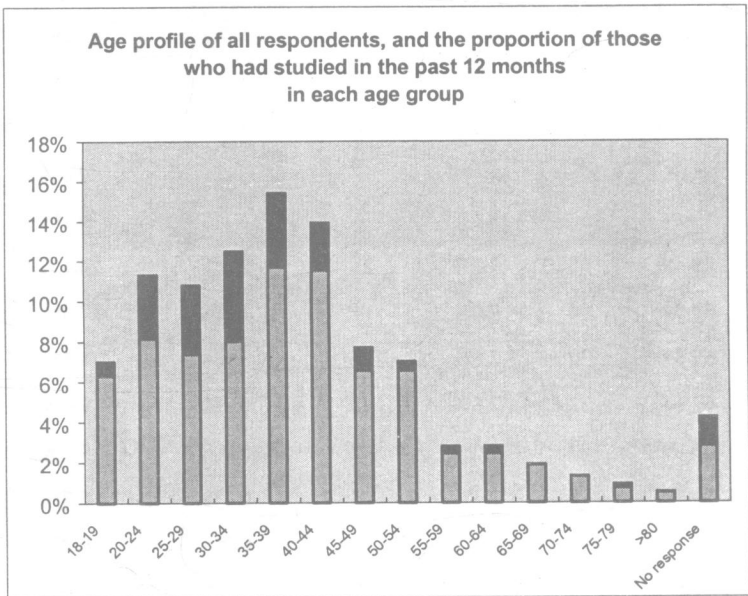
1.1 Age Profile with Recent Participation Rates

Table 11

Age	Count	Frequency	Studied in the past 12 months (Count)	Studied in the past 12 months	Participation rate in that group
18-19	80	7.0%	8	0.7%	10.0%
20-24	129	11.3%	36	3.2%	27.9%
25-29	123	10.8%	39	3.4%	31.7%
30-34	142	12.5%	51	4.5%	35.9%
35-39	175	15.4%	42	3.7%	24.0%
40-44	158	13.9%	27	2.4%	17.1%
45-49	88	7.7%	13	1.1%	14.8%
50-54	80	7.0%	5	0.4%	6.3%
55-59	32	2.8%	4	0.4%	12.5%
60-64	32	2.8%	4	0.4%	12.5%
65-69	22	1.9%	0	0.0%	0.0%
70-74	15	1.3%	0	0.0%	0.0%
75-79	10	0.9%	2	0.2%	20.0%
>80	6	0.5%	0	0.0%	0.0%
No response	48	4.2%	16	1.4%	33.3%
Total	1140	100%	247	21.7%	

The same information is presented in graphical form below, where the whole bar represents the percentage of all 1,140 respondents who are in a particular age group, and the upper, shaded part of each bar represents the percentage (also of all 1,140 respondents) who had undertaken CPE studies in the preceding 12 months.

Diagram 1



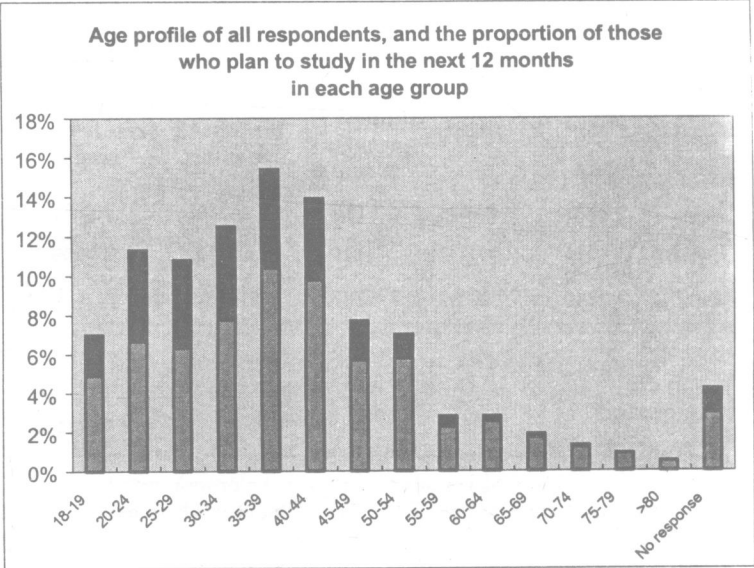
1.2 Anticipated Participation Rates of Prospective
Participants classified by Age

Table 12

Age	Count	Frequency	Will study in the next 12 months (Count)	Will study in the next 12 months	Participation rate in that group
18-19	80	7.0%	24	2.1%	30.0%
20-24	129	11.3%	53	4.6%	41.1%
25-29	123	10.8%	51	4.5%	41.5%
30-34	142	12.5%	54	4.7%	38.0%
35-39	175	15.4%	57	5.0%	32.6%
40-44	158	13.9%	47	4.1%	29.7%
45-49	88	7.7%	23	2.0%	26.1%
50-54	80	7.0%	14	1.2%	17.5%
55-59	32	2.8%	6	0.5%	18.8%
60-64	32	2.8%	3	0.3%	9.4%
65-69	22	1.9%	2	0.2%	9.1%
70-74	15	1.3%	1	0.1%	6.7%
75-79	10	0.9%	0	0.0%	0.0%
>80	6	0.5%	0	0.0%	0.0%
No response	48	4.2%	14	1.2%	29.2%
Total	1140	100%	349	30.6%	

The same information is presented in graphical form below.

Diagram 2



■ + ■ Percentage of 1,140 respondents who are within a particular age group

■ Percentage of 1,140 respondents within a particular age group who plan to study in the next 12 months

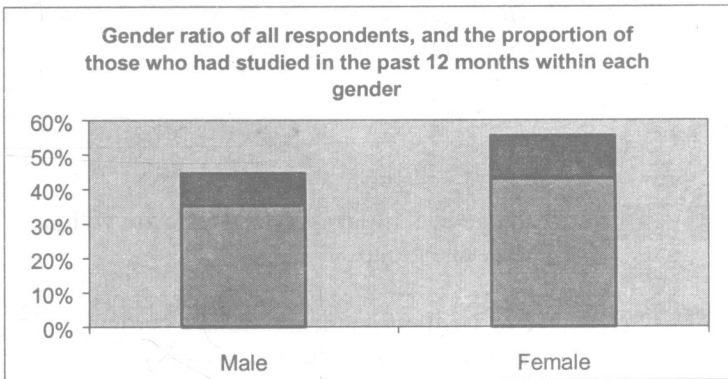
2. Gender Ratio

2.1 Gender Ratio with Recent Participation Rates

Table 13

Gender	Count	Frequency	Studied in the past 12 months (Count)	Studied in the past 12 months	Participation rate in that group
Male	509	44.6%	106	9.3%	20.8%
Female	631	55.4%	141	12.4%	22.5%
Total	1140	100%	247	21.7%	

Diagram 3



■ + ■ Percentage of 1,140 respondents who are male or female

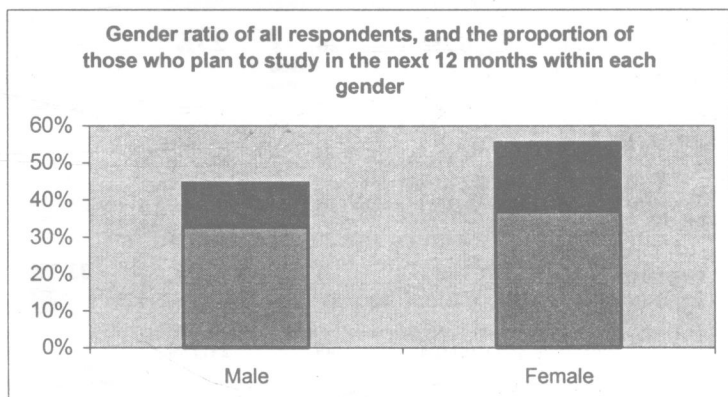
■ Percentage of 1,140 respondents within each gender who had studied in the past 12 months

2.2 Anticipated Participation Rates of Prospective Participants classified by Gender

Table 14

Gender	Count	Frequency	Will study in the next 12 months (Count)	Will study in the next 12 months	Participation rate in that group
Male	509	44.6%	137	12.0%	26.9%
Female	631	55.4%	212	18.6%	33.6%
Total	1140	100%	349	30.6%	

Diagram 4



■ + ■ Percentage of 1,140 respondents who are male or female

■ Percentage of 1,140 respondents within each gender who plan to study in the next 12 months

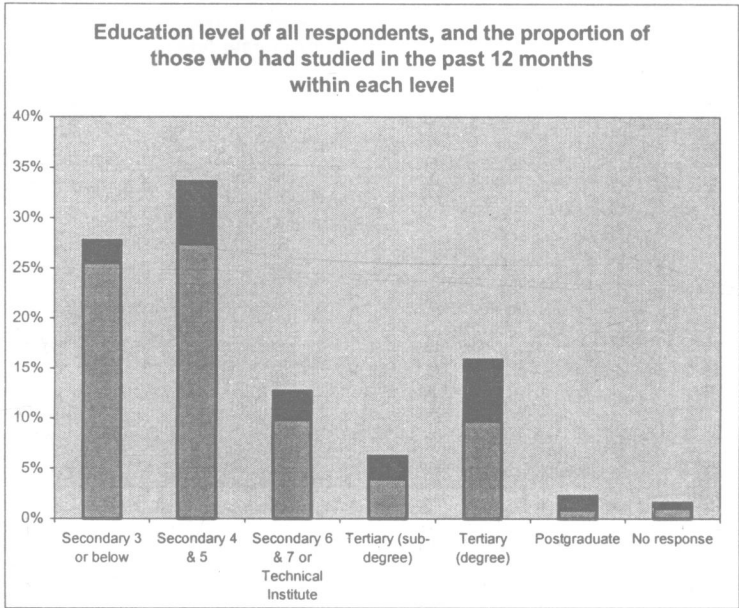
3. Education Level

3.1 Education Level and Recent Participation Rates

Table 15

Education	Count	Frequency	Studied in the past 12 months (Count)	Studied in the past 12 months	Participation rate in that group
Secondary 3 or below	316	27.7%	25	2.2%	7.9%
Secondary 4 & 5	383	33.6%	71	6.2%	18.5%
Secondary 6 & 7 or Technical Institute	145	12.7%	33	2.9%	22.8%
Tertiary (sub-degree)	71	6.2%	26	2.3%	36.6%
Tertiary (degree)	181	15.9%	70	6.1%	38.7%
Post-graduate	26	2.3%	16	1.4%	61.5%
No response	18	1.6%	6	0.5%	33.3%
Total	1140	100.0%	247	21.7%	

Diagram 5



+ Percentage of 1,140 respondents who are within a particular education group

Percentage of 1,140 respondents within a particular education group who had studied in the past 12 months

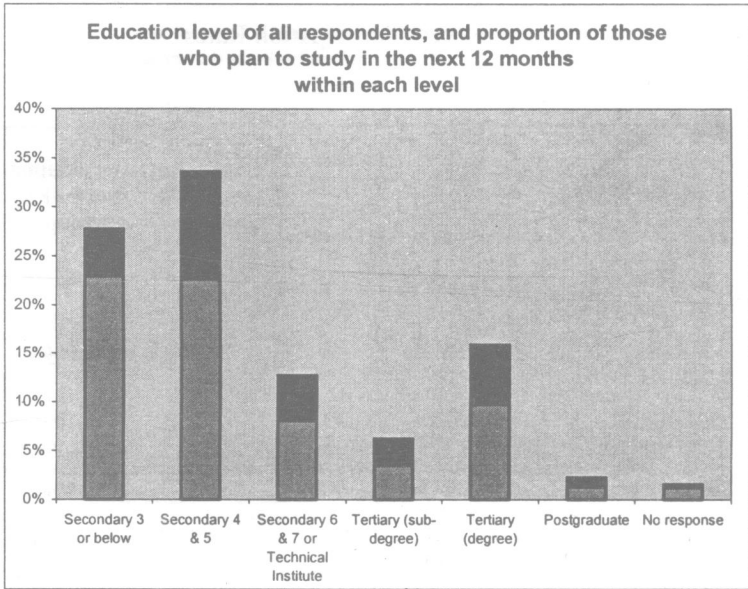
3.2 Anticipated Participation Rates of Prospective Participants classified by Education Level

Table 16

Education	Count	Frequency	Will study in the next 12 months (Count)	Will study in the next 12 months	Participation rate in that group
Secondary 3 or below	316	27.7%	55	4.8%	17.4%
Secondary 4 & 5	383	33.6%	125	11.0%	32.6%
Secondary 6 & 7 or Technical Institute	145	12.7%	53	4.6%	36.6%
Tertiary (sub- degree)	71	6.2%	31	2.7%	43.7%
Tertiary (degree)	181	15.9%	70	6.1%	38.7%
Post- graduate	26	2.3%	11	1.0%	42.3%
No response	18	1.6%	4	0.4%	22.2%
Total	1140	100.0%	349	30.6%	

Note: Comparing with the results in Table 15, significant increase in the propensity to participate is observed for the lower education groups.

Diagram 6



+ Percentage of 1,140 respondents who are within a particular education group

Percentage of 1,140 respondents within a particular education group who plan to study in the next 12 months

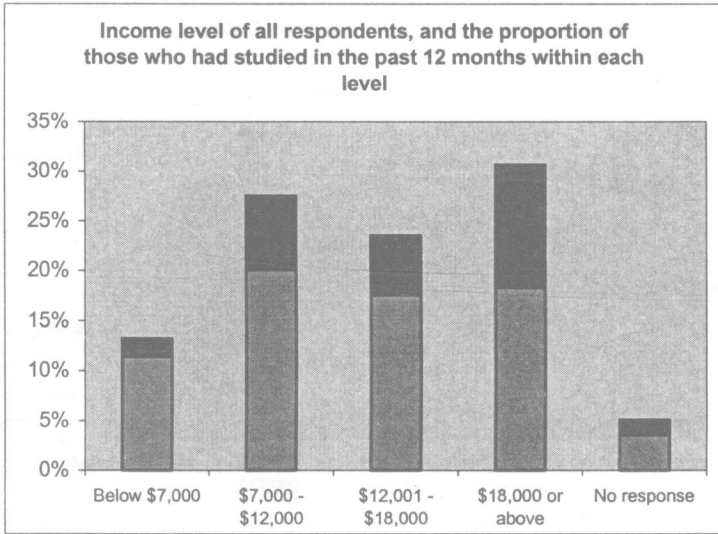
4. Income Level



4.1 Income Level and Recent Participation Rates


Table 17

Income	Count	Frequency	Studied in the past 12 months (Count)	Studied in the past 12 months	Participation rate in that group
Below \$7,000	96	13.2%	13	1.8%	13.5%
\$7,000 - \$11,999	200	27.5%	54	7.4%	27.0%
\$12,000 - \$17,999	171	23.5%	43	5.9%	25.1%
\$18,000 or above	223	30.7%	90	12.4%	40.4%
No response	37	5.1%	11	1.5%	29.7%
Total	727	100%	211	29.0%	

Diagram 7



-  +  Percentage of 727 respondents (those who provided information on their monthly income) who are within a particular income group

-  Percentage of 727 respondents within a particular income group who had studied in the past 12 months

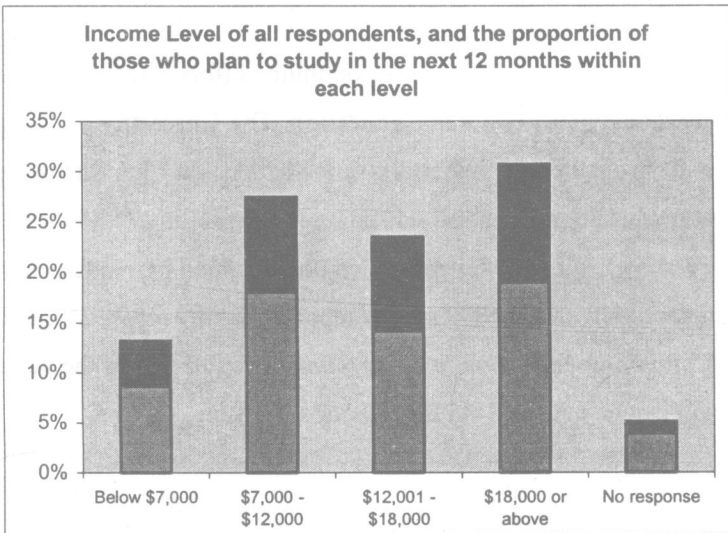
4.2 Anticipated Participation Rates of Prospective
Participants classified by Income Level

Table 18

Income	Count	Frequency	Will study in the next 12 months (Count)	Will study in the next 12 months	Participatio n rate in that group
Below \$7,000	96	13.2%	33	4.5%	34.4%
\$7,000 - \$11,999	200	27.5%	69	9.5%	34.5%
\$12,000 - \$17,999	171	23.5%	68	9.4%	39.8%
\$18,000 or above	223	30.7%	85	11.7%	38.1%
No response	37	5.1%	9	1.2%	24.3%
Total	727	100%	264	36.3%	

Note: Comparing with the results in Table 17, significant increase in the propensity to participate is observed for the lower income groups.

Diagram 8



■ + ■ Percentage of 727 respondents who are within a particular income group

■ Percentage of 727 respondents within a particular income group who plan to study in the next 12 months

Closing Remark

The present survey is part of the continuing effort of the School of Professional and Continuing Education, The University of Hong Kong, in gathering important information on the status of continuing and professional education in Hong Kong. While it can be read by itself, a better picture can be obtained by reading it in conjunction with the 1999 survey report *A Survey on the Demand of Continuing Education in Hong Kong*. The full text of the latter report can be accessed via the School's website:

<http://www.hku.hk/space>

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