

INDUSTRIAL INSIGHTS REPORT

- Hypermarket / Supermarket / Departmental Store
- Direct Selling
- Sale and Repair of Motor Vehicles





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WHAT'S INSIDE?

HRD Corp's Industrial Insights Report intends to share the latest training-related updates and insights for various industries in Malaysia. This report will be crucial for HRD Corp and other associated stakeholders to learn from present issues and work towards improving the nation's human capital development. This report also highlights the general industry outlook and training trends under HRD Corp, as well as employers' qualitative feedback. It covers the importance of the industry, training overview, industry demographics, related skill areas, and academic qualifications for the current workforce, as well as training challenges and their impact.

Instead of taking the traditional social sciences research approach, this report adapted an action research approach inspired by Kurt Lewin's process, with the aspiration of inducing changes in HRD Corp to better meet the changing needs of registered employers. Using HRD Corp's internal data as well as qualitative feedback from selected employers, the insights and recommendations are provided for our reader's enlightenment.

Nevertheless, it should be noted that since the content of this report is confined to the context of the selected HRD Corp industries and our registered employers, there are limitations to the extent of how the content can be applied to the wider industry.

This issue focuses on these three (3) industries:

- **Hypermarket / Supermarket / Departmental Store**
- **Direct Selling**
- **Sale and Repair of Motor Vehicles**

GENERAL OUTLOOK

DEFINITION

The resale (sale without transformation) of new and used goods, mainly to the general public for personal or household consumption or utilisation, by shops, department stores, stalls, mail-order houses, hawkers and peddlers, consumer cooperatives, etc.

It also includes the retail sale of a variety of product lines in the same unit (non-specialised stores), such as supermarkets or department stores besides retail sale in stores specialised in selling food, beverage or tobacco products.

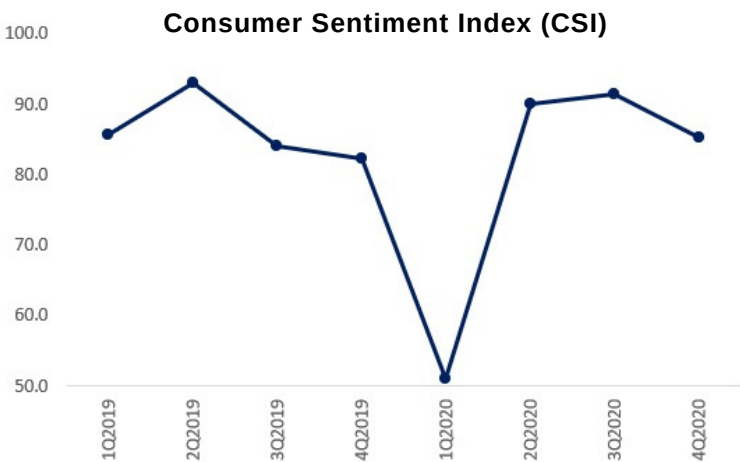
Source: Malaysia Standard Industrial Classification (MSIC), 2008

INDUSTRY PERFORMANCE

The wholesale and retail trade industry contracted by 6.1% in 2020 due to disruptions in the global and domestic supply chains. Nonetheless, the industry contributed 17.0% to the annual Gross Domestic Product (GDP) and 28.8% to the annual Services sector's GDP last year.

Supermarkets and Hypermarkets, despite being able to remain open throughout the various movement control orders, reported poor results of -12.0% for the whole year. Meanwhile the **Department Store** recorded a negative growth rate of 38.3%, the worst retail performer among all retail components.

Source: 1. Economic and Monetary Review, Bank Negara Malaysia, 2020
2. Malaysia Retailers Association (MRA) and Retail Group Malaysia (RGM), 2021



The Consumer Sentiment Index fell to 85.2 points during 4Q2020, with the indicator going below the 100-point threshold for the ninth consecutive quarter.

The deterioration was due to weaker income, financial and job confidence sags and worries over inflation growth which led to reduction in shopping by the average consumer.

Source: Malaysian Institute of Economic Research (MIER)

INDUSTRY OUTLOOK

Previously, the industry had anticipated reasonable growth after a tumultuous 2020. According to the Malaysian Retailers Association (MRA) and Retail Group Malaysia (RGM), the retail industry was foreseen to grow by 4% this year based on their initial projections.

However, after the MRA and RGM had taken the Full Movement Control Order (FMCO) and Enhanced Movement Control Order (EMCO) into consideration, they concluded that the heightened uncertainty resulted in greater challenges in achieving a decent recovery. The retail growth rate may be slowed by 1-2% this year, depending on the developments over the next quarter.

TRAINING OUTLOOK

DEMOGRAPHIC PROFILE OF HYPERMARKET / SUPERMARKET / DEPARTMENTAL STORE
REGISTERED UNDER HRD CORP



Employers
795



Employees
117,482



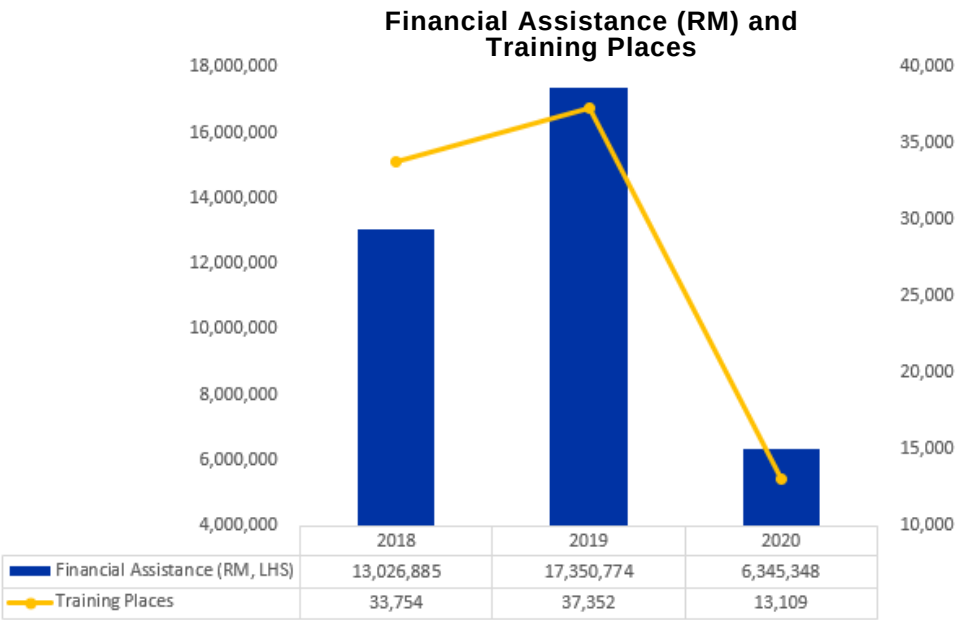
**Levy
Collected**
RM6.55 mil



**Levy
Utilisation**
83.8%

Source: HRD Corp Internal Database, 2020

As of 2020, there are 795 employers with 117,482 employees in the Hypermarket/ Supermarket/ Departmental Store industry registered with HRD Corp. In terms of levy utilisation status, the industry expended up to 83.8% of the total levy collected. The detailed breakdown of training places and financial assistance approved for the industry starting from the year of 2018 to 2020 are as per the chart below:



Source: HRD Corp Internal Database, 2020
Note: LHS = Left-hand side

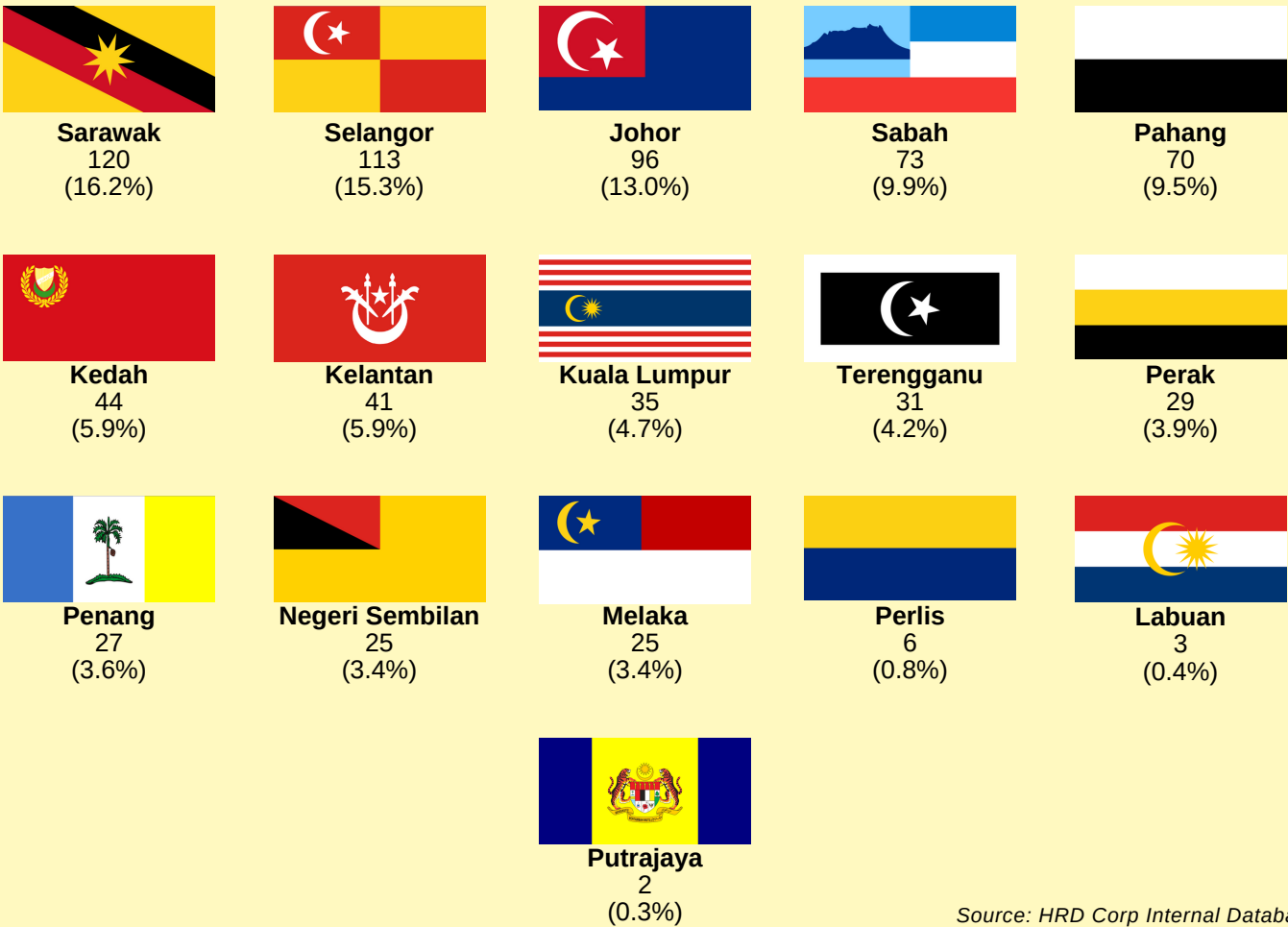
Training places for the Hypermarket / Supermarket / Departmental Store industry have reduced by 65% compared to 2019 due to the implementation of the Movement Control Order (MCO) which restrains mass gatherings, including face-to-face training.

The financial assistance is generally aimed at supporting training places. Thus, resonating the slump in the training places, the aid provided was registered at merely RM6.3 million (or -63%), as compared to RM17.4 million in 2019.

More than a year of dealing with the pandemic, retailers are still struggling while more stores have pulled down their shutters for good.

STATISTICS

NUMBER OF REGISTERED EMPLOYERS ACCORDING TO STATES IN 2020

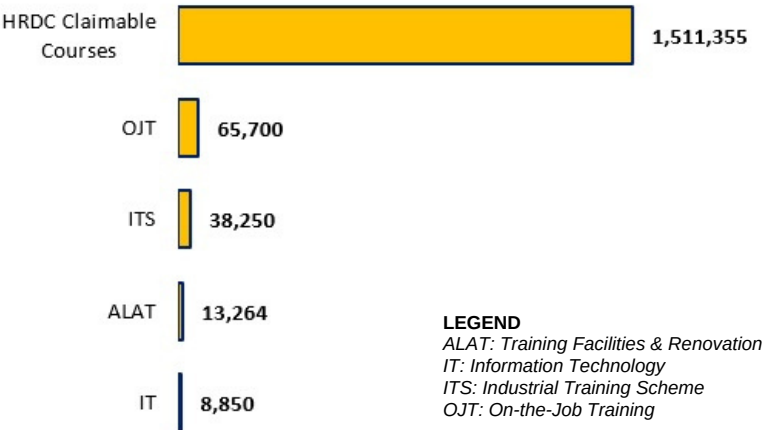


Source: HRD Corp Internal Database, 2020

The statistics above outline the number of registered employers in Hypermarket / Supermarket / Departmental Store industry, according to states. The highest representation of employers was from Sarawak (15.9%), followed by Selangor (15.0%) and Johor (12.6%). The total establishments comprise 73% of SMEs and 27% of large employers.

HRD LEVY SCHEMES

Financial Assistance Approved (RM) according to HRD Corp Schemes in 2020



HRD Corp Claimable Courses rank the most favoured scheme among employers in the industry, with financial assistance totalling RM1.51 million.

Source: HRD Corp Internal Database, 2020

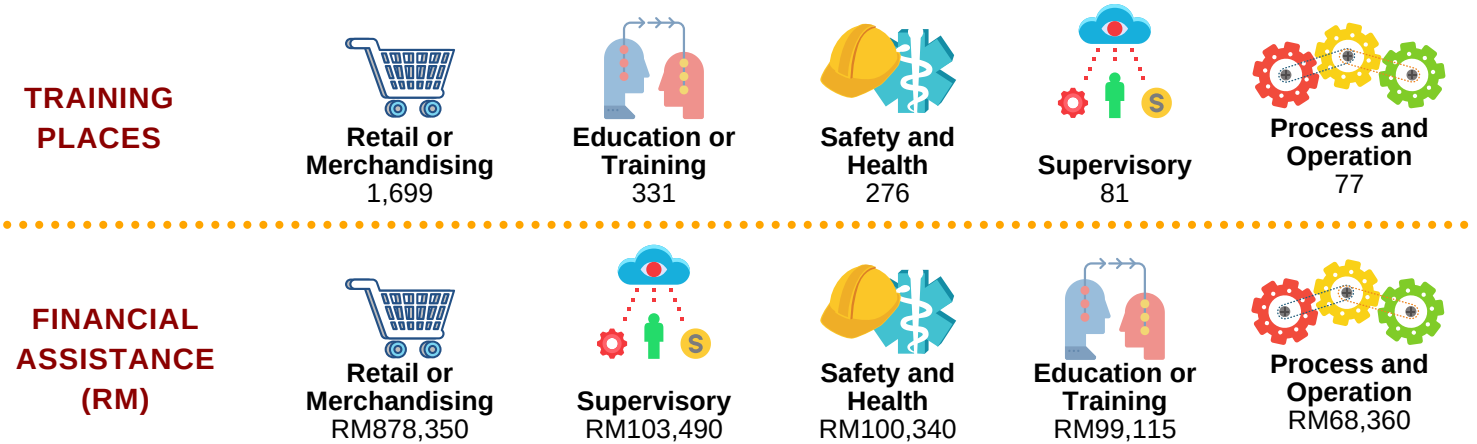
OVERALL TRAINING FEE

Below are the training fees per pax approved under this industry, divided into three (3) categories:

Highest Cost	Medium Cost
• Essential Skills in Retailing: RM2,500 • Basic Digital and Electronic Marketing: RM2,400 • High Impact Business Communications: RM2,000	• Professional Certificate of Retailing: RM857 • Microsoft Excel (Intermediate): RM850 • Assertive Supervisory Skills: RM800
Lowest Cost	
• Termination Within the Law: RM75 • Promoting Skills: RM70 • Customer Service Workshop: RM70	

Training courses for employees in the Hypermarket / Supermarket / Departmental Store industry primarily revolve around interpersonal skills, e.g., promoting, assisting, tending to customers' query as well as technical skills. High-cost training fees for retailers mainly emphasise on practical knowledge with long training hours.

SKILL AREA



Based on Training Places, Retail or Merchandising is the most in-demand skills in 2020. Such skills aim to attract customers, persuade existing customers buy more, ramp up impulse sales and increase customer awareness of product lines. This skill area was followed by Education or Training, as well as Safety and Health.

Looking at the financial assistance provided, a huge portion of financial assistance injected into the Hypermarket / Supermarket / Departmental Store skill areas went to Retail or Merchandising (58%) which amounted to RM878,350. Supervisory and Safety and Health on the other hand, accounted for 7% respectively.

TRAINING NEEDS SURVEY 2019

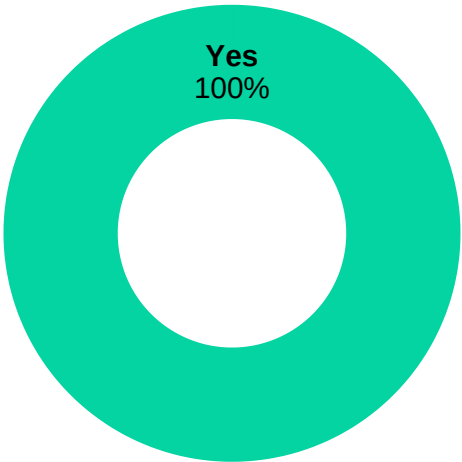
EMPLOYERS FEEDBACK

Based on the Training Needs Survey 2019, working in Hypermarket / Supermarket / Departmental Store industry is often associated with exposure to retail management and customer service. Employees across all skill levels are instrumental in ensuring that a retail organisation functions at its highest capacity, serves its target consumers, and aligns back end operations with its front end.

MASCO	TECHNICAL SKILLS	NON-TECHNICAL SKILLS
SKILLED WORKER	• Retail Management • Customer Service • E-Store / Online Shopping • Planning and Organising	• Team Building • Conflict Resolution • Creative Thinking • Problem Solving • Effective Communications • Leadership
SEMI-SKILLED WORKER	• Cashiering Skill • Fresh Market Management • Literacy • Merchandising Management • Filing and Documentation • Handling Customer Complaint	• Interpersonal Skill • Managing Conflict • Building Confidence • Effective Communication
LOW-SKILLED WORKER	• Basic Language Literacy • Basic IT Literacy • Customer Service • Accountability • Quality Check / Control in Merchandising • Sales Skills	• Communications • Time Management • Work Ethics • Interpersonal Skills

VIEW ON UTILISATION OF HRD LEVY (OPINION-BASED)

Does your organisation actively use HRD levy?



Reasons for Active Usage (100%)

- Compulsory training
- Upskilling employees to become more competent

GENERAL OUTLOOK

DEFINITION

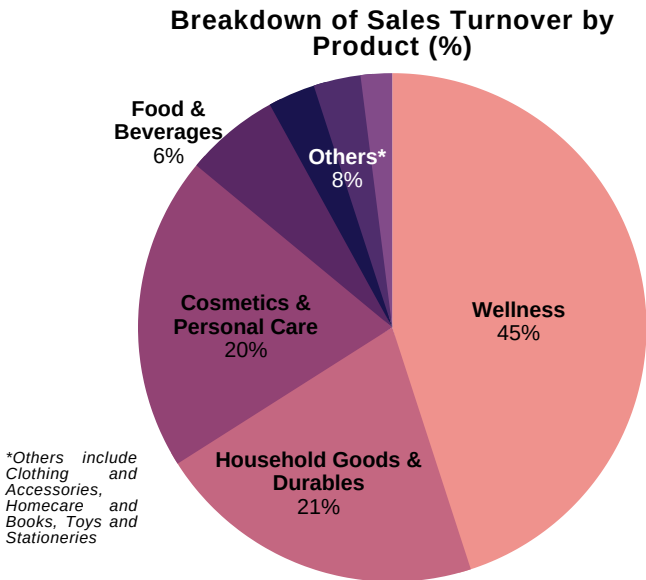
The retail sale by commission agents and activities of retail auctioning houses. This group includes retail sale activities by mail order to houses, over the Internet, through door-to-door sales, vending machines, etc.

Direct Selling companies sell these products through a system where the products are sold through Independent Distributors authorised with a Distributor's Contract. Distributors undertake to market, distribute and sell the company's products and provide services thereafter, directly to consumers.

Source: 1. Malaysia Standard Industrial Classification (MSIC), 2008
2. Direct Selling Association Malaysia (DSAM), 2021

INDUSTRY PERFORMANCE

The latest Direct Selling Report, published by the World Federation of Direct Selling Associations (WFDSA), shows that global direct sales has increased by 2.3% year-on-year, from US\$175.3 billion in 2019 to US\$179.3 billion in 2020.



Source: Direct Selling Association Malaysia (DSAM), 2021

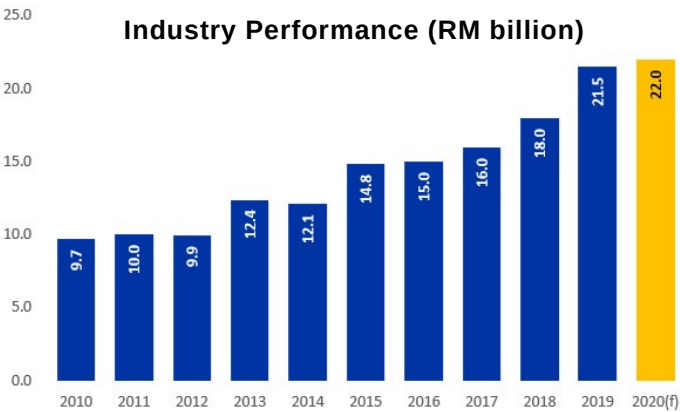
In the breakdown of sales turnover by product, Wellness was the bestseller in the country, accounting for 45% of total Direct Selling products sold. The second spot goes to Household Goods & Durables at 21% while Cosmetics and Personal Care products took the third spot at 20%.

INDUSTRY OUTLOOK

From DSAM's long term trend analysis together with MDTCA's (Ministry of Domestic Trade and Consumer Affairs) projection, industry sales turnover could hit RM22 billion in 2020.

The industry demonstrated resilience despite most commercial sectors recording a downtrend due to the pandemic. Looking ahead, Direct Selling in Malaysia is expected to accelerate in the coming year as pandemic measures ease and retail regains momentum.

In 2019, the Direct Selling industry as a whole achieved RM21.5 billion in sales, exceeding its RM18.5 billion target significantly.



Source: Direct Selling Association Malaysia (DSAM), 2021

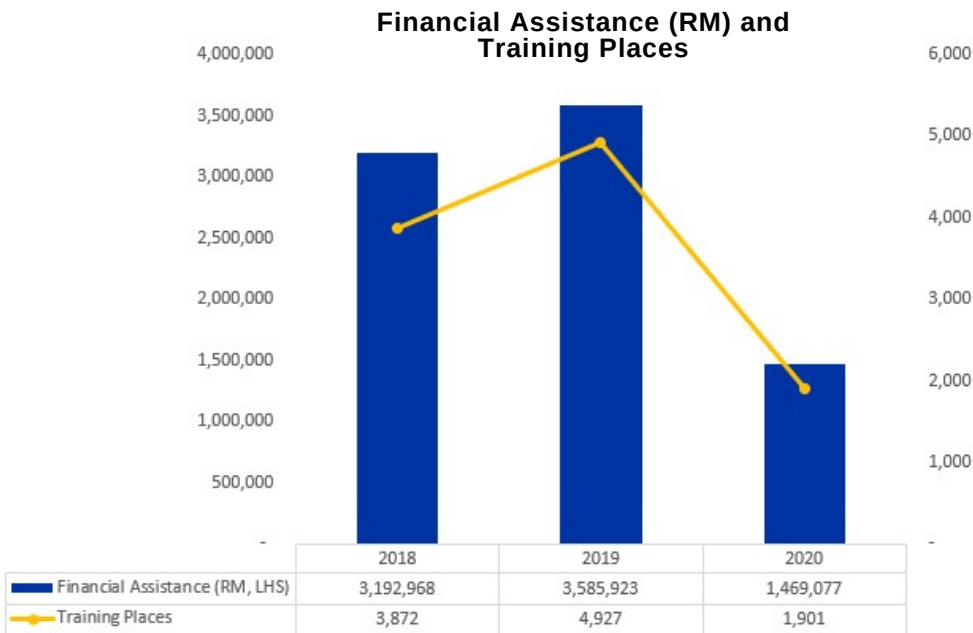
TRAINING OUTLOOK

DEMOGRAPHIC PROFILE OF DIRECT SELLING REGISTERED UNDER HRD CORP



Source: HRD Corp Internal Database, 2020

There are 245 employers with 14,320 employees in the Direct Selling industry registered with HRD Corp, as of 2020. Levy utilisation of the industry grew at about 60.2% of the total levy collected. The detailed breakdown of training places and financial assistance approved for the industry starting from 2018 to 2020 are as per the chart below:



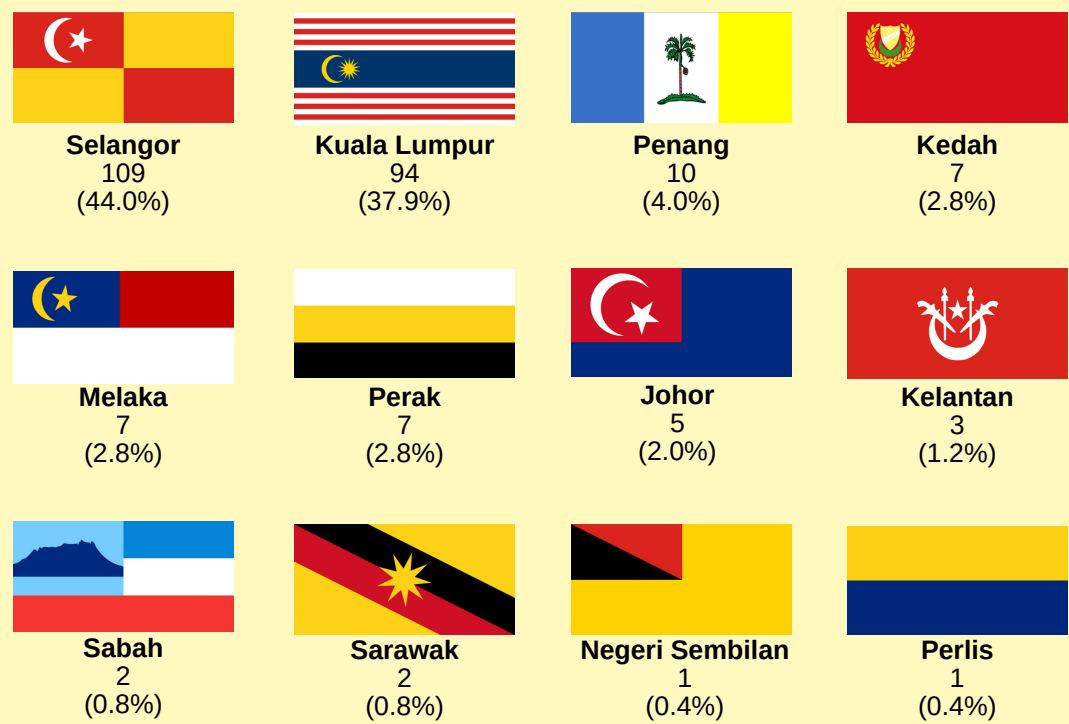
Source: HRD Corp Internal Database, 2020
Note: LHS = Left-hand side

The number of training places declined significantly by 61% going from 4,927 in 2019, to 1,901 in 2020. Meanwhile, the financial assistance provided was registered at RM1.5 million, as compared to RM3.6 million in 2019. As in all other retail channels, Direct Selling sales have been directly impacted by the COVID-19 crisis, with players forced to redesign strategies and quickly implement changes.

The face-to-face appeal that makes this channel unique was directly hit by the pandemic, as a result of the temporary closure of workplace, as it is common that sellers are work colleagues of customers. With the adoption of social distancing measures, demonstration meetings have been discouraged as well. In this context, leveraging digital tools typically associated with e-commerce, such as live streaming proved to be a viable alternative.

STATISTICS

NUMBER OF REGISTERED EMPLOYERS ACCORDING TO STATES IN 2020

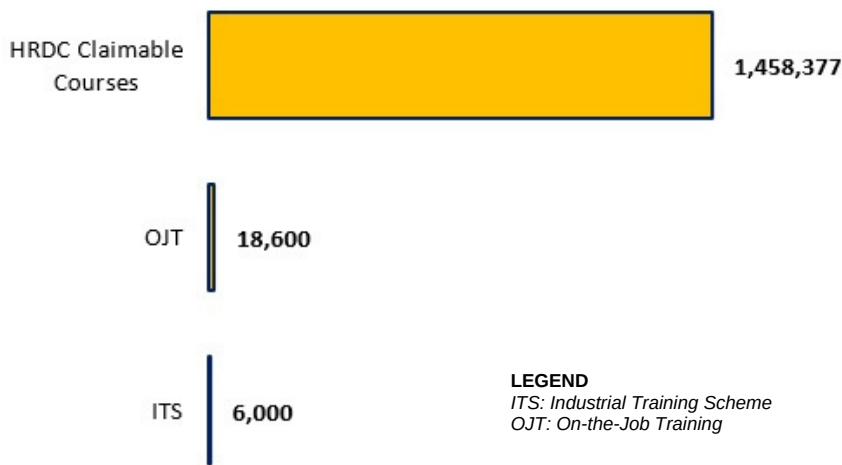


Source: HRD Corp Internal Database, 2020

The statistics above outline the number of registered employers in Direct Selling industry, according to states. The highest representation of employers was from Selangor (44.0%), followed by Kuala Lumpur (37.9%) and Penang (4.0%). Meanwhile, the total establishments comprise 86% small and medium enterprises (SMEs) and 14% large employers.

HRD LEVY SCHEMES

Financial Assistance Approved (RM) according to HRD Corp Schemes in 2020



As in-person meetings were almost impossible during the pandemic, the majority of Direct Selling companies conducted online training through the HRD Corp Claimable Courses scheme. Training became more important than ever in ensuring operational effectiveness is maintained as the business grows.

Source: HRD Corp Internal Database, 2020

OVERALL TRAINING FEE

Below are the training fees per pax approved under this industry, as divided into three (3) categories:

Highest Cost	Medium Cost
- Oxford Entrepreneurship - Venture: RM10,400 - Talent Management Professional Certification Programme: RM9,116 - Certified Data Scientist Specialist (CDSS): RM5,247	- Incoterms® 2020 - New Update: RM995 - Payroll Management in Compliance with Malaysian Laws: RM954 - Social Commerce: RM942
Lowest Cost	
- Microsoft Power Point Intermediate & Advance Level: RM90 - Advanced Distressed Customer Engagement 2020: RM83 - Contractor Safety Passport System High Risk: RM75	

Training courses for employees in the Direct Selling industry mainly focus on entrepreneurial skills, inter-personal skills, presentation skills and closing the deal. These type of trainings are appealing, especially to those planning or starting a new business or scaling an existing venture and would like to gain a comprehensive understanding of the industry.

SKILL AREA

TRAINING PLACES	 Marketing and Sales 472	 Team Building or Motivation 316	 Education or Training 159	 Computer or IT 135	 Publishing or Media 111
FINANCIAL ASSISTANCE (RM)	 Marketing and Sales RM325,439	 Team Building or Motivation RM263,417	 Publishing or Media RM117,208	 Strategic Management RM109,125	 Computer or IT RM109,081

Employees in the industry are expected to be well-versed in Marketing and Sales strategy, thus making it the most demanded skills in the Direct Selling industry. According to the Queensland Government, such skill area aims to target ideal customers, market on a budget, increase sales to existing and lapsed customers, as well as to test and measure sales performances.

A large amount of financial assistance was channeled into the Marketing and Sales skill area which amounted to RM325,439 or 22% of the total financial assistance provided for this industry. Meanwhile, the financial assistance allocated for Team Building and Publishing or Media accounted for 18% and 8%, respectively.

Source: Benefits of Direct Marketing, Queensland Government

TRAINING NEEDS SURVEY 2019

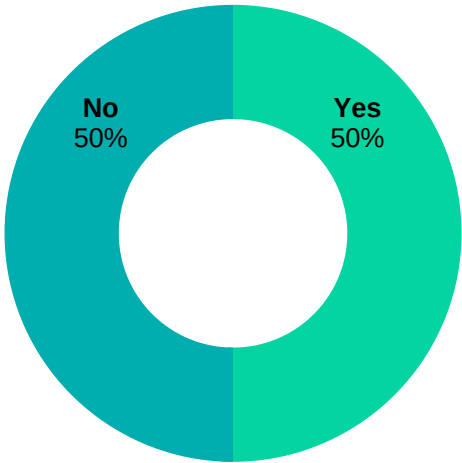
EMPLOYERS FEEDBACK

Based on the Training Needs Survey 2019, working in Direct Selling is often associated with exposure to direct marketing and customer service. Employees across all skill levels are subjected to salesmanship, where they must grow a flexible, and low-cost business while selling products and services directly to customers.

MASCO	TECHNICAL SKILLS	NON-TECHNICAL SKILLS
SKILLED WORKER	• Business Management • Project Management • Computer or IT • Machinery Operation	• Leadership • Planning and Organising • Decision Making • Interpersonal Skills
SEMI-SKILLED WORKER	• Computer or IT • Technical Writing • Machinery Operation • Sales Skills	• Communications • Clerical or Administration
LOW-SKILLED WORKER	• Machinery Operation • Sales Skills	• Work Ethics • Communications

VIEW ON UTILISATION OF HRD LEVY (OPINION-BASED)

Does your organisation actively use HRD levy?



Reasons for Active Usage (50%)

- Compulsory training

Reasons for Less Active Usage (50%)

- Difficulty in finding relevant training courses

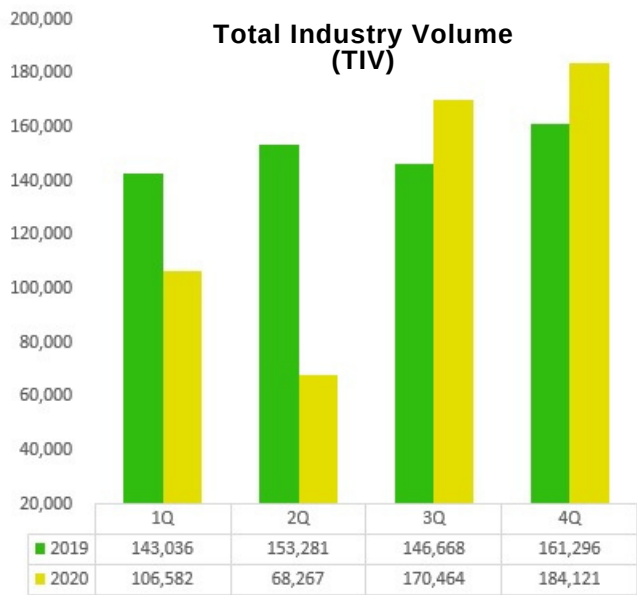
GENERAL OUTLOOK

DEFINITION

All activities (except manufacture and renting) related to motor vehicles and motorcycles, including lorries and trucks, such as the wholesale and retail sale of new and second-hand vehicles, the repair and maintenance of vehicles and the wholesale and retail sale of parts and accessories for motor vehicles and motorcycles. Also included are activities of commission agents involved in wholesale or retail sale of vehicles. This division also includes activities such as washing and polishing of vehicles, etc.

This group includes wholesale and retail sale of new and used vehicles, wholesale and retail sale of off-road motor vehicles (jeeps, etc.), wholesale and retail sale by commission agents and car auctions.

Source: Malaysia Standard Industrial Classification (MSIC), 2008



Source: Malaysian Automotive Association (MAA), 2020

INDUSTRY PERFORMANCE

The MCO has induced a significant drop in vehicle sales beginning in March and lasting through to December 2020.

The Total Industry Volume (TIV) declined by 12% to 529,434 unit for 2020 (2019: 604,281), the passenger vehicles segment saw a decline by 69,212 units, or 12.6%, while the commercial vehicles segment saw a drop of 5,635 units or 10.4% over the same period.

INDUSTRY OUTLOOK

The National Automotive Policy 2020 (NAP2020) is expected to contribute RM104.2 billion to Malaysia's GDP over the next 10 years. The forecasted contribution is in-line with its projection of total production volume of 1.47 million vehicles and TIV of 1.22 million vehicles by 2030. The overall intended outcome of the NAP2020 is an increase in research of new technologies; the creation of business and job opportunities, particularly for SMEs; and the development of new manufacturing processes and value chains within the local automotive and overall automobile sector.

The NAP2020 will be spearheaded by the country's export market projections for new automotive parts and components (RM28.3 billion), complete built-up unit vehicles (RM12.3 billion) and remanufactured automotive parts and components (RM10 billion) by 2030.

The introduction of new models with the latest designs and specifications at very competitive prices may assist in sustaining buying interests. Meanwhile the on-going aggressive promotional campaigns by car companies could also boost sales and maintain market share.

Source: 1. National Automotive Policy, 2020
2. Ministry of International Trade and Industry, 2020

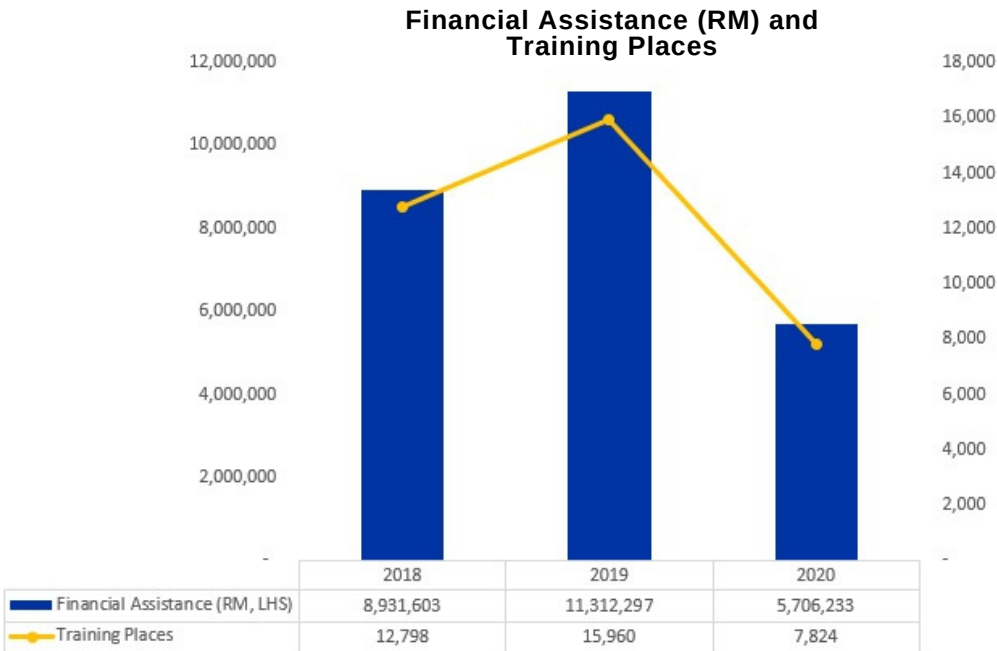
TRAINING OUTLOOK

DEMOGRAPHIC PROFILE OF SALE AND REPAIR OF MOTOR VEHICLES REGISTERED UNDER HRD CORP



Source: HRD Corp Internal Database, 2020

There are 2,402 employers with 82,610 employees in the Sale and Repair of Motor Vehicles industry registered with HRD Corp, as of 2020. Levy utilisation of the industry grew about 57.0% of the total levy collected. The detailed breakdown of training places and financial assistance approved for the industry from 2018 to 2020 are as per the chart below:



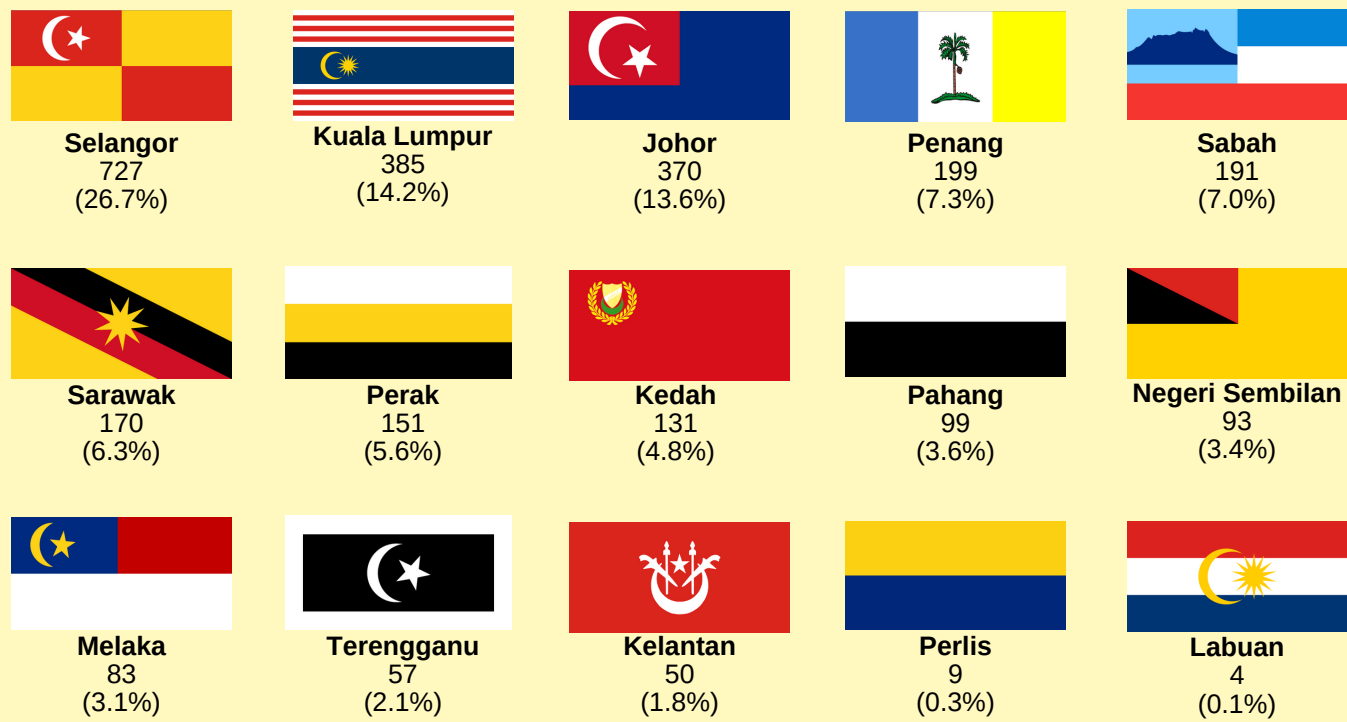
Source: HRD Corp Internal Database, 2020
Note: LHS = Left-hand side

Sale and Repair of Motor Vehicles' training trend dropped significantly by 51% to 7,824 in 2020, from 15,960 in 2019. Sales had halted in many states throughout Malaysia as the automotive sector was not listed as an essential economic activity. On the other hand, the financial assistance channeled into the industry was registered at RM5.7 million, as compared to RM16.0 million in 2019.

The enforcement of the pandemic measures took a toll on traffic volume in showrooms. The shutdown of some parts suppliers due to COVID-19 also resulted in the short supply of components and parts for some companies.

STATISTICS

NUMBER OF REGISTERED EMPLOYERS ACCORDING TO STATES IN 2020

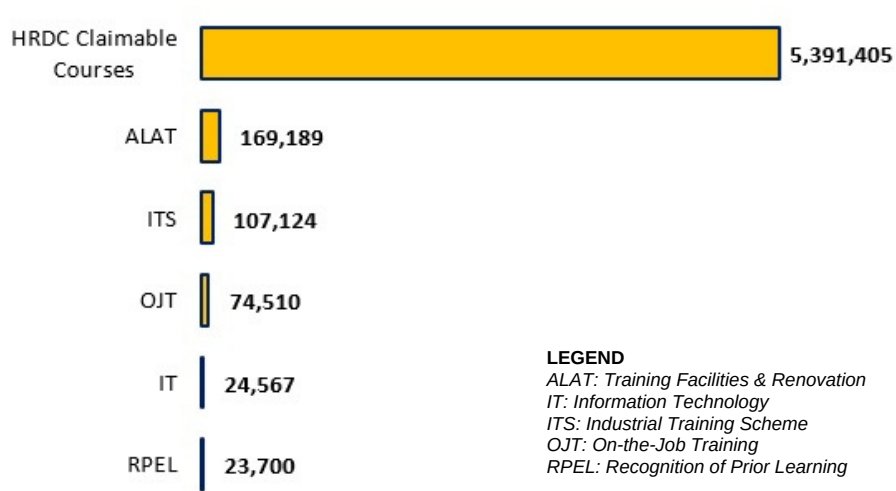


Source: HRD Corp Internal Database, 2020

The statistics above illustrate the number of registered employers in Sale and Repair of Motor Vehicles, according to states. The highest representation of employers was from Selangor (26.7%), followed by Kuala Lumpur (14.2%) and Johor (13.6%). Meanwhile, the total establishments comprise 94% SMEs and 6% large employers.

HRD LEVY SCHEMES

Financial Assistance Approved (RM) according to HRD Corp Schemes in 2020



The breakdown of approved financial assistance revealed that HRD Corp Claimable Courses was the most favourable scheme, with more than 93% allocation. In-house training was highly preferred among employers as this is also claimable under the scheme.

Source: HRD Corp Internal Database, 2020

OVERALL TRAINING FEE

Below are the training fees per pax approved under this industry, divided into three (3) categories:

Highest Cost	Medium Cost
• Vistage Key Collaborative Leadership Programme: RM10,532 • Certified Environmental Professional in Scheduled Waste Management: RM6,200 • Debt Management and Recovery: RM2,600	• Tax Planning for Managers: RM995 • Employment Law for Managers: Contract, Termination & Post COVID-19 Issues: RM995 • Malaysian Labour Law - Understanding Its Implementation: RM90
Lowest Cost	
• Critical Thinking & Decision Making Skills in These Challenging Times: RM93 • Cash Flow Management, Collection Planning and Working Capital Management During & Post COVID-19: RM87 • CKD vs CBU: Is There a Middle Ground for Tax Purposes?: RM75	

Apart from technical courses relating to motor vehicles, employers also invest in leadership, environmental, regulations and financial trainings. These type of trainings are appealing especially to those who are responsible for showing, selling and repairing automobiles.

SKILL AREA

TRAINING PLACES	 Marketing and Sales 2,639	 Quality and Productivity 736	 Customer Service 525	 Strategic Management 453	 Team Building or Motivation 422
FINANCIAL ASSISTANCE (RM)	 Marketing and Sales RM1,231,462	 Quality and Productivity RM660,744	 Customer Service RM519,540	 Strategic Management RM516,898	 Team Building or Motivation RM368,863

As in all other sales channel, employees are expected to be well-versed in Marketing and Sales strategy, making it the most in-demand skill in the Sale and Repair of Motor Vehicles industry. For instance, a salesman will typically discuss the negotiation offers from customers with the manager or owner of the dealership. The car salesman will then come back to the customer and let them know if a deal has been authorised or if there is a counter-offer.

A huge portion of financial assistance was channeled into the Marketing and Sales skill area which amounted to more than RM1.23 million or 23% of the total financial assistance. Meanwhile, the financial assistance allocated for Quality and Productivity, and Customer Service accounted for 12% and 10%, respectively.

TRAINING NEEDS SURVEY 2019

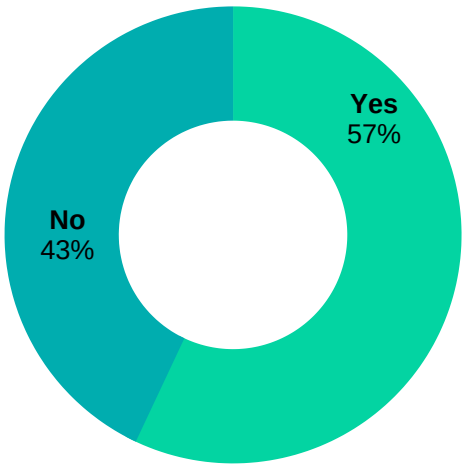
EMPLOYERS FEEDBACK

Based on the Training Needs Survey 2019, working in Sale and Repair of Motor Vehicles is often associated with exposure to direct marketing and customer service. Employees across all skill levels are subjected to salesmanship, advising on product range, diagnostic and technical aptitude.

MASCO	TECHNICAL SKILLS	NON-TECHNICAL SKILLS
SKILLED WORKER	• Computer or ICT • Mechanics Skills • Wiring Skills • Marketing • Customer Service	• Project Management • Communication • Emotional Intelligence
SEMI-SKILLED WORKER	• Computer or ICT • Mechanics Skills • Wiring Skills • Sales Skills • Customer Service	• Clerical or Administration • Communication
LOW-SKILLED WORKER	• Mechanics Skills • Wiring Skills	• Stress Management • Time Management • Supervisory Skills • Literacy

VIEW ON UTILISATION OF HRD LEVY (OPINION-BASED)

Does your organisation actively use HRD levy?



Reasons for Active Usage (57%)

- Improve employees' efficiency
- Regulatory compliance
- Claimable under HRD Corp-approved training

Reasons for Less Active Usage (43%)

- Difficulty in finding relevant training
- Newly-registered employer

COMPARISON IN THE GROWTH NUMBER OF HRD CORP REGISTERED EMPLOYERS AND EMPLOYEES

	2019		2020
HYPERMARKET / SUPERMARKET / DEPARTMENTAL STORE	Employers: 676 Employees: 111,247	→	Employers: 795 (+17.6%) Employees: 117,482 (+5.6%)
DIRECT SELLING	Employers: 244 Employees: 14,323	→	Employers: 245 (+0.4%) Employees: 14,320 (0.0%)
SALE AND REPAIR OF MOTOR VEHICLE	Employers: 1,914 Employees: 70,508	→	Employers: 2,402 (+25.5%) Employees: 82,610 (+17.2%)

All three industries registered an increase in the number of employers, apart from marginal decline of employees in the Direct Selling industry for the year 2020. This situation could arise from the fact that most markets expected to face a deterioration in employment levels amidst a COVID-induced recession. While direct selling companies are expanding, the industry might need to compete for workforce with gig economy players in which household incomes are guaranteed. Moving forward, we will see significant boost in the number of employers registered with HRD Corp in accordance with the Expansion of the PSMB Act 2001. This means more training from varied industries would be conducted as employers gain access to a more structured training fund.

In line with the National Investment Aspirations' goals; attracting the right investments; building innovation capacity and increasing both productivity and growth, registered employers could encourage their employees to reskill and upskill, implying that everyone has the opportunity to make a difference in the economy.

Source: National Investment Aspirations (NIA)

CHALLENGES IN TRAINING

The employers who cited that their company was facing issues such as difficulties in finding relevant training for the employees could seek consultation from HRD Corp to ensure that the training is accredited and will bring significant value to their organisation. Although some of the newly-registered employers might be less aware of the grant application process and may seem discouraged from utilising levy, HRD Corp has been offering an "Onboarding Session" to help employers tackle the issue.

TOP SKILL AREA

The statistics show that "Marketing and Sales" and "Retail or Merchandising" are the prioritised skill areas by employers in the three (3) industries discussed in this report. These top skill areas are deemed to be critical as employees are expected to be well-versed with the latest trends and information. Even during the lockdown, employees in the industry are still able to engage with customers virtually. However, this is only limited to certain services as customers still prefer to visit a showroom for the touch and feel experience.



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