

渣打香港中小企領先營商指數

Standard Chartered Hong Kong SME Leading Business Index

調查結果

Results

2020年第一季度
2020 Q1



背景

Background

- 【渣打香港中小企領先營商指數】季度調查，由香港生產力促進局獨立執行，渣打銀行（香港）有限公司全力贊助
- The “Standard Chartered Hong Kong SME Leading Business Index”, independently implemented by Hong Kong Productivity Council and sponsored by Standard Chartered Bank (Hong Kong) Limited

調查目的

Survey Objectives



- 剖析本地中小企對近期營商環境的信心
- To analyse Hong Kong SMEs' confidence in the business environment
- 探討中小企應對2020年營商挑戰的方法
- To explore SMEs' response to business challenges in 2020

本季重點

Key Points for this Quarter



2020年度第一季的綜合營商指數較上季上升1.7至 **33.1**，顯示中小企的營商信心略見好轉
2020 Q1 Overall Index increased by 1.7 from last quarter, reading at **33.1**, indicating that SMEs' confidence in the business environment turns better



大多數中小企在2020年維持保守的營商策略，惟亦見不少中小企轉趨進取
Most of the SMEs remain conservative for its business strategy in 2020, while some SMEs tend to pursue progressive approach



91%受訪中小企表示於制訂2020營商策略時需要外界的支援，當中55%中小企希望得到資金上的支援
91% of surveyed SMEs needed external supports when formulating 2020 business strategy, while 55% SMEs wished to receive the funding support



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2020 年第一季綜合營商指數

Overall Index of 2020 Q1



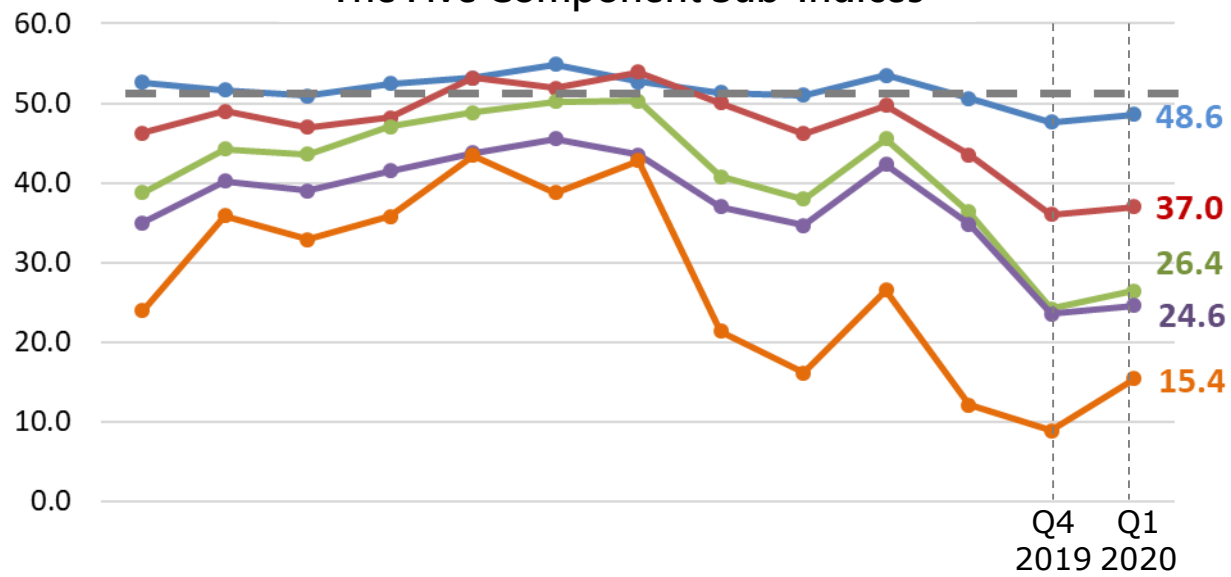
	2017 Q1	2017 Q2	2017 Q3	2017 Q4	2018 Q1	2018 Q2	2018 Q3	2018 Q4	2019 Q1	2019 Q2	2019 Q3	2019 Q4	2020 Q1
綜合營商指數 Overall Index	41.9	45.6	44.3	46.5	49.4	49.7	49.7	43.0	40.4	46.0	39.0	31.4	33.1

綜合營商指數與分項指數

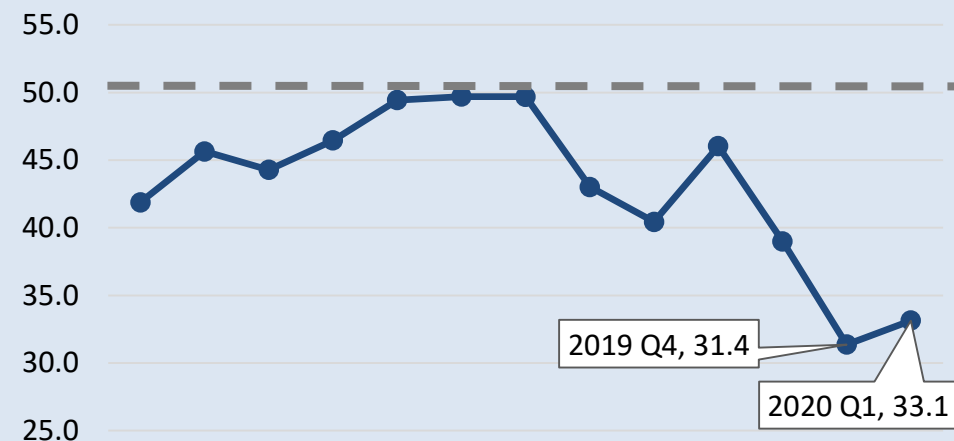
Overall Index & Component Sub-indices

- 五個分項指數均上升
- 「環球經濟」錄得較明顯升幅
- All five component sub-indices **increased simultaneously**
- “**Global Economy**” sub-index recorded a more significant climb

分項指數
The Five Component Sub-Indices



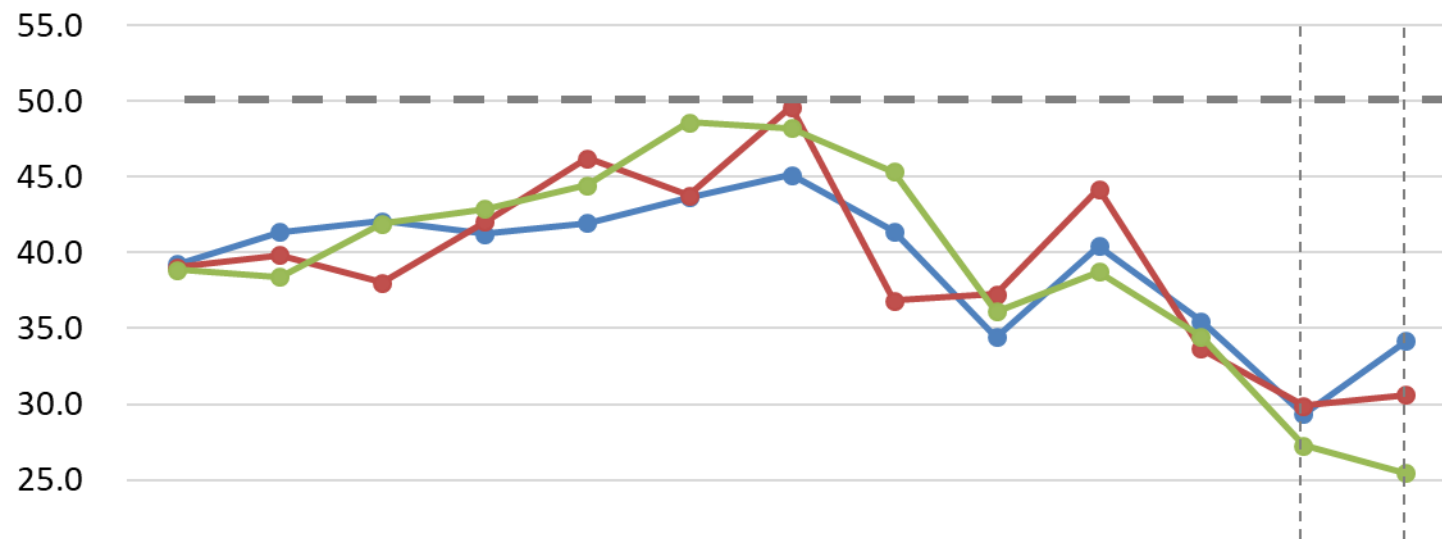
綜合營商指數
Overall Index



- 招聘意向
Recruitment Sentiment
- 投資意向
Investment Sentiment
- 營業狀況
Business Condition
- 盈利表現
Profit Margin
- 環球經濟
Global Economy

- 「製造業」及「進出口貿易及批發業」分類指數較上季**上升**
- 「零售業」分類指數則輕微下跌
- Sub-indices for “Manufacturing” and “Import/Export Trade & Wholesale” **increased** when compared to last quarter
- Sub-index for **“Retail”** recorded a slight decrease

行業分類指數
SME Index for Selected Industries



製造業
Manufacturing

進出口貿易及批發業
Import/Export Trade & Wholesale

零售業
Retail

製造業
Manufacturing

進出口及貿易批發業
Import/ Export Trade & Wholesale

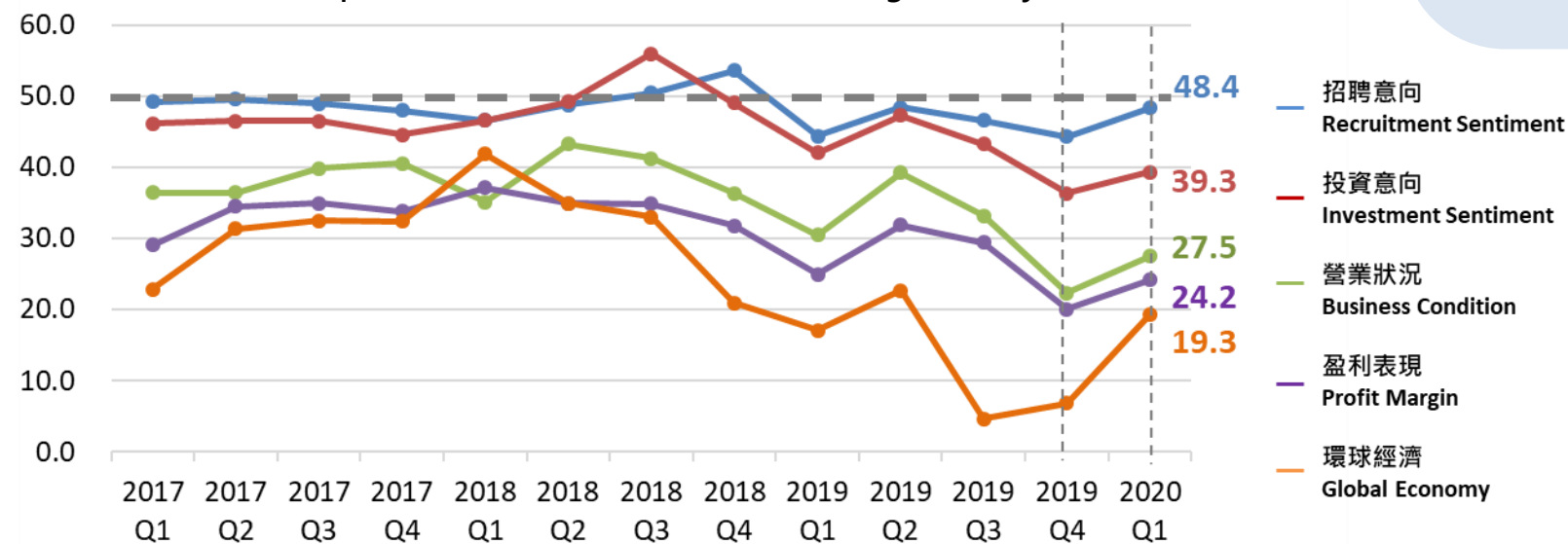
零售業
Retail

製造業 Manufacturing

- 行業指數較上季升4.9至**34.2**
- 對比上季，**所有分項指數均上升**，其中「**環球經濟**」錄得較明顯升幅
- Industry sub-index increased by 4.9 to **34.2**
- All sub-indices increased simultaneously** when compared to last quarter, while “**Global Economy**” sub-index recorded a more significant climb

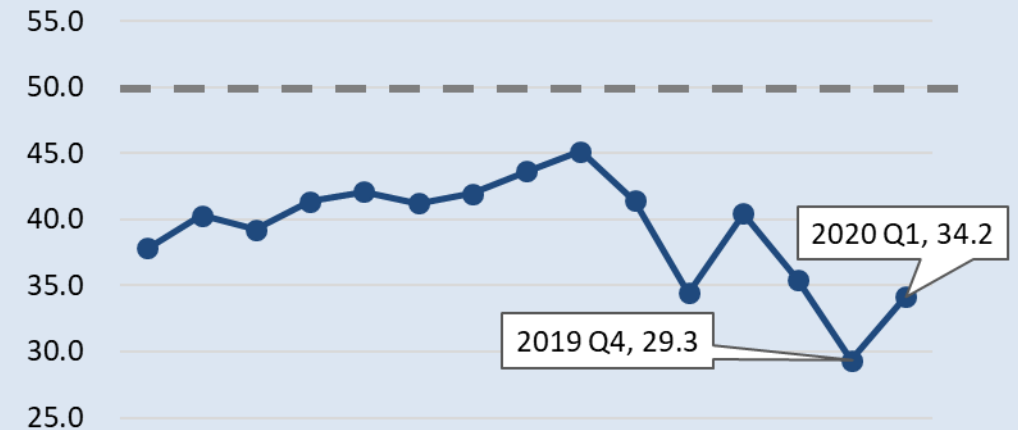
製造業分項指數

Component Sub-Indices of Manufacturing Industry



製造業分類指數

Manufacturing Industry Sub-Index



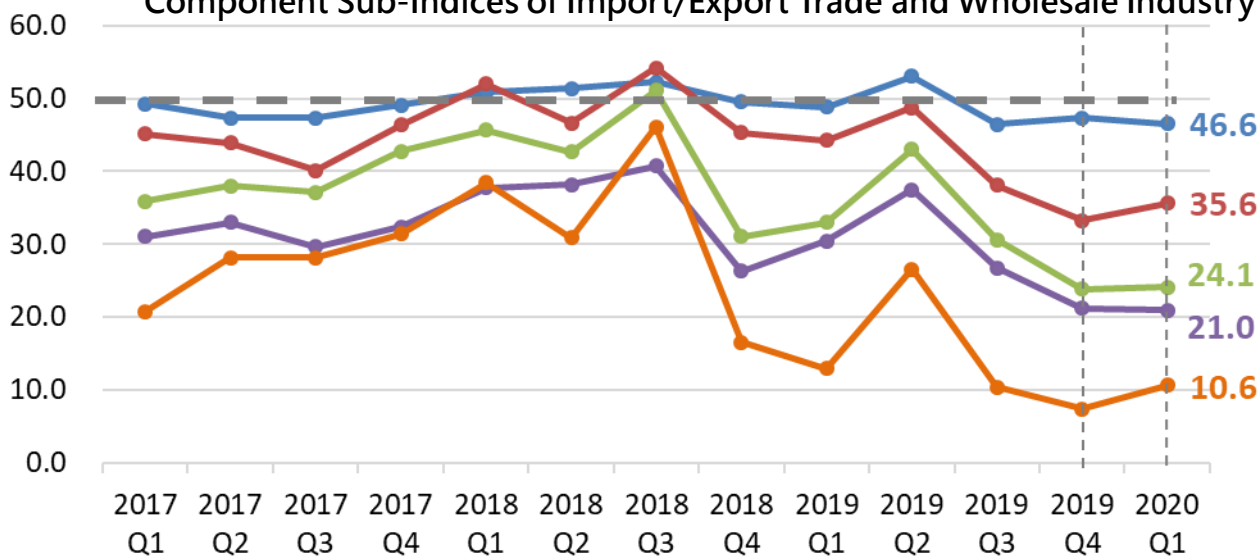
進出口貿易及批發業

Import/Export Trade & Wholesale

- 行業指數較上季輕微上升0.7至**30.6**
- 對比上季，「投資意向」、「營業狀況」及「環球經濟」分項指數均錄得輕微**上升**
- Industry sub-index dropped by 0.7 to **30.6**
- Compared to last quarter, “**Investment Sentiment**”, “**Business Condition**” and “**Global Economy**” sub-indices recorded a **slight increase**

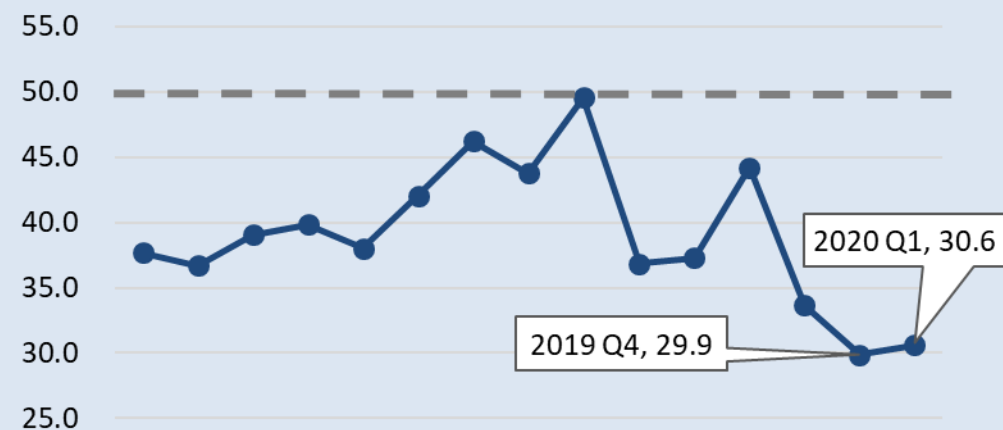
進出口貿易及批發業分項指數

Component Sub-Indices of Import/Export Trade and Wholesale Industry



進出口貿易及批發業分類指數

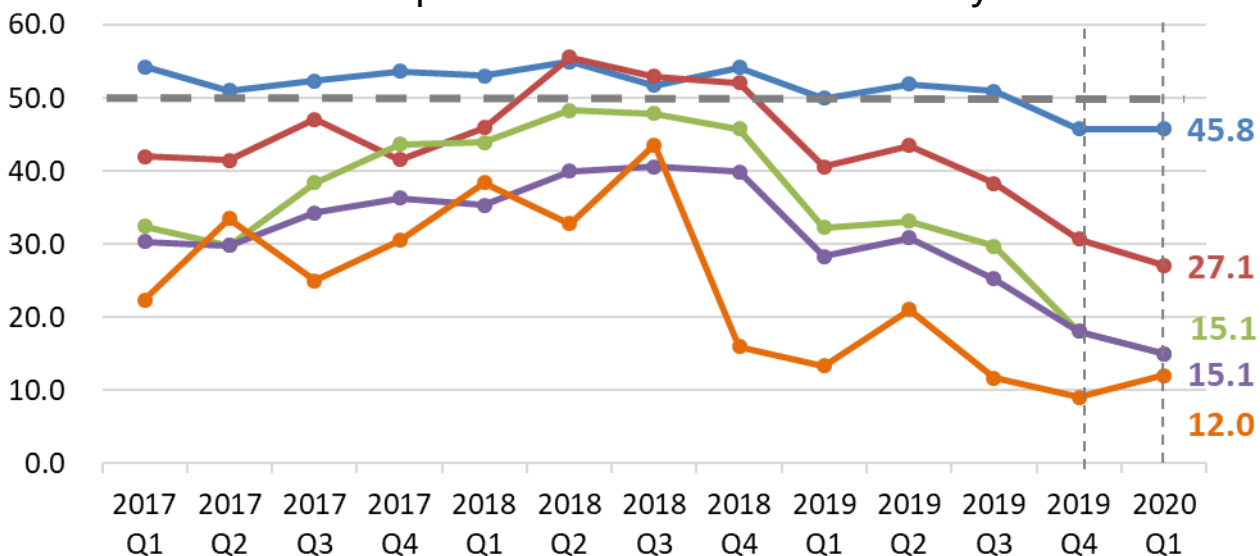
Import/Export Trade & Wholesale Industry Sub-Index



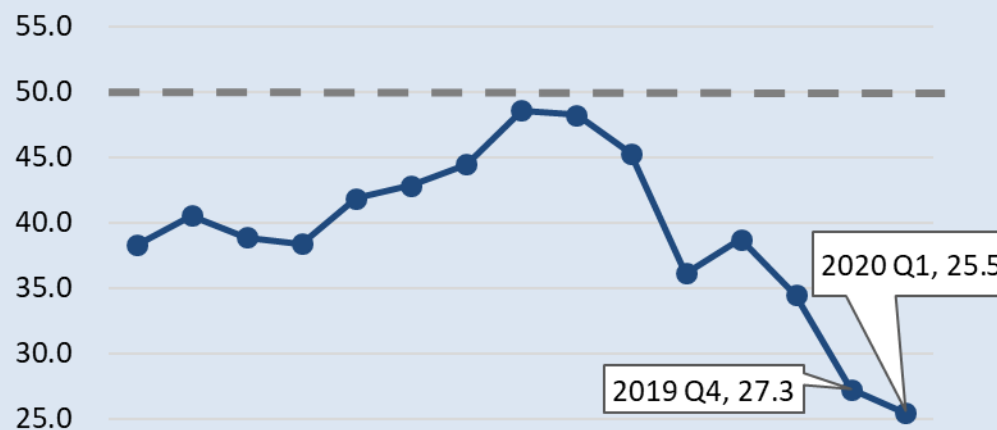
- 招聘意向
Recruitment Sentiment
- 投資意向
Investment Sentiment
- 營業狀況
Business Condition
- 盈利表現
Profit Margin
- 環球經濟
Global Economy

- 行業指數較上季跌1.8至**25.5**
- 對比上季，只有「環球經濟」分項指數輕微上升
- Industry sub-index dropped by 1.8 to **25.5**
- Compared to last quarter, only “**Global Economy**” sub-index recorded a slight increase

零售業分項指數
Component Sub-Indices of Retail Industry



零售業分類指數
Retail Industry Sub-Index



- 招聘意向
Recruitment Sentiment
- 投資意向
Investment Sentiment
- 營業狀況
Business Condition
- 盈利表現
Profit Margin
- 環球經濟
Global Economy

渣打香港中小企領先營商指數

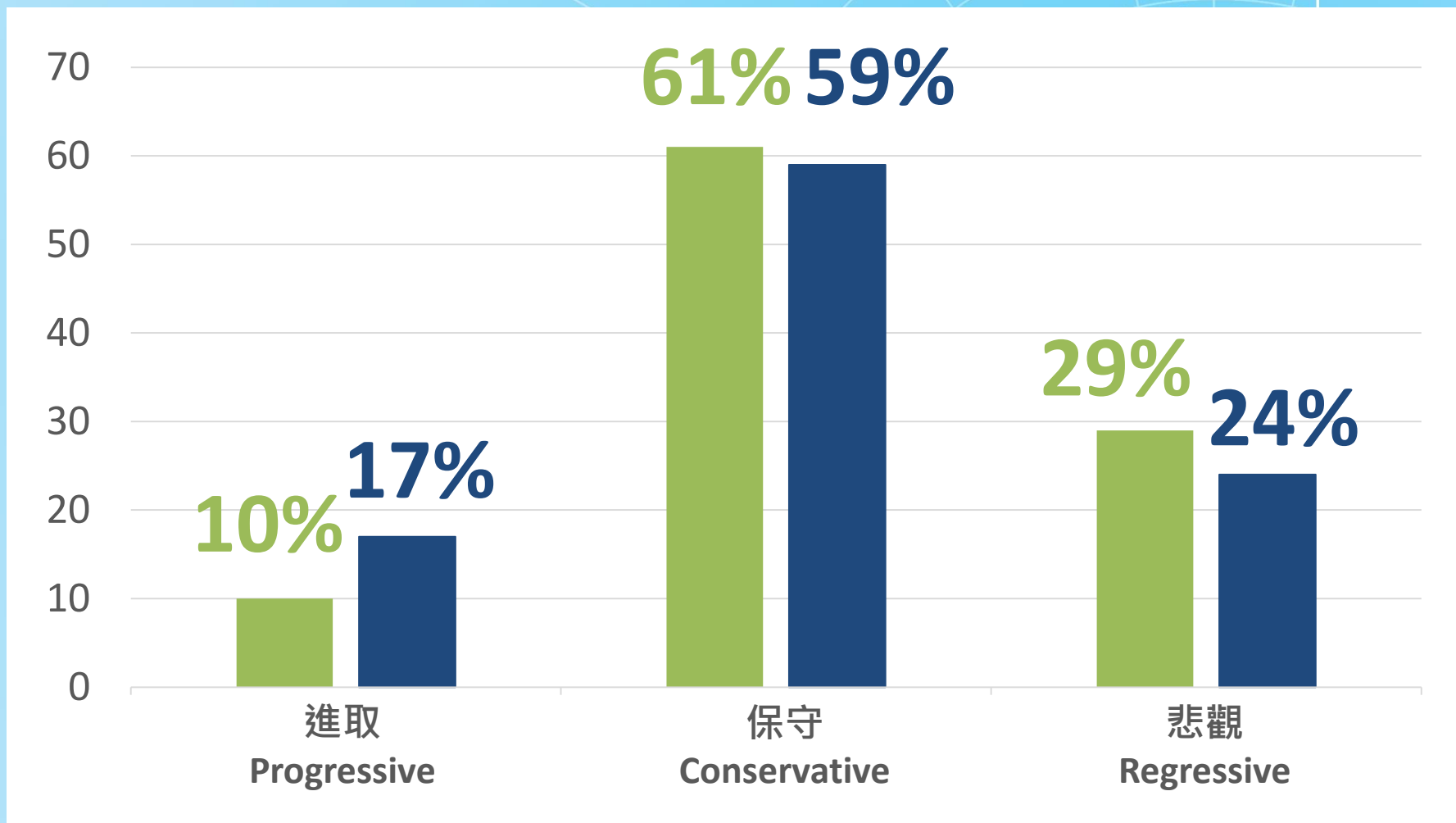
Standard Chartered Hong Kong SME Leading Business Index

調查專題

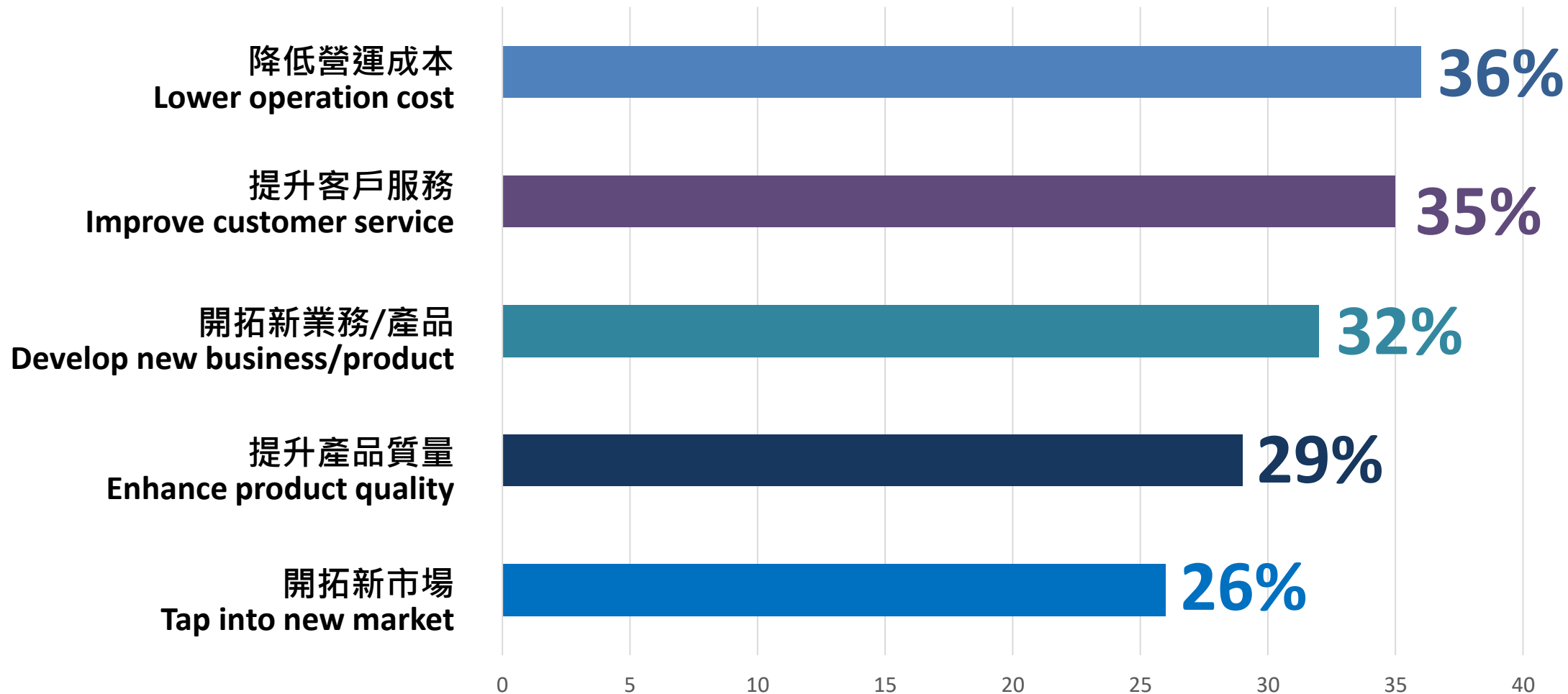
Featured Topic



中小企營商策略的方向： SMEs' Business Strategic Direction:

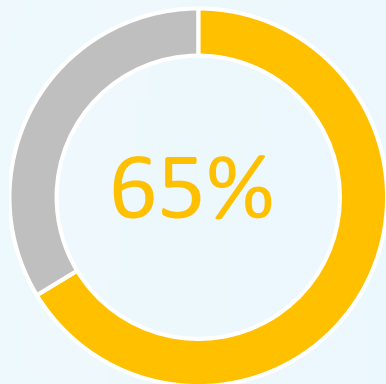


中小企應對2020年營商挑戰的方法： SMEs' Response to Business Challenges in 2020:

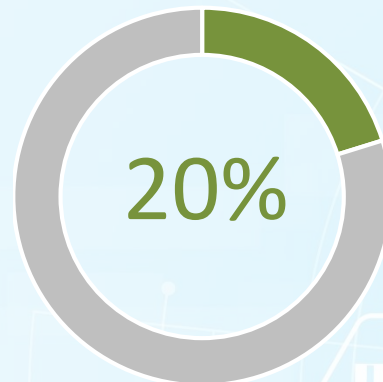


中小企預期落實營商策略的時間：

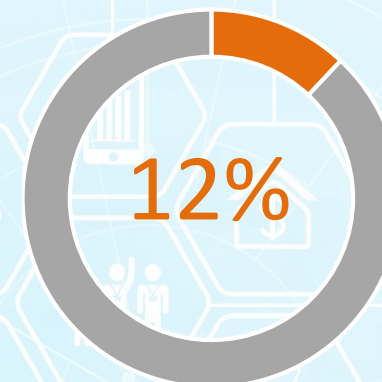
SMEs' Expected Timeline to Implement Business Strategy :



2020年第一季度
2020 Q1



2020年第二季度
2020 Q2

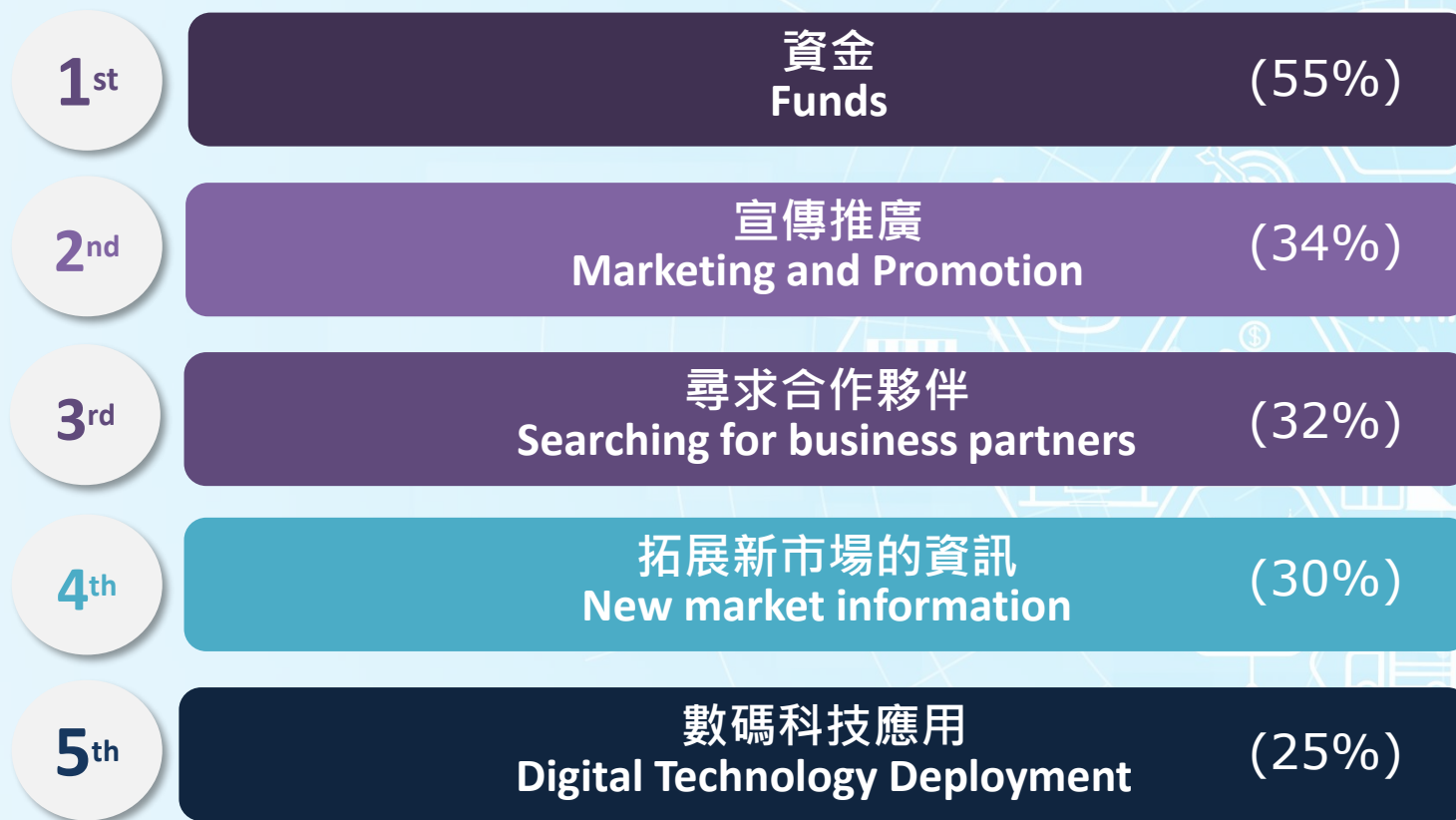


2020年第三季度或以後
2020 Q3 onwards



制訂營商策略時，中小企希望得到的支援：

Supports that SMEs Wish to Receive when Formulating Business Strategy :



資金支援方面，中小企期望得到的協助：

Assistance that SMEs Wish to Receive on Funding Support:

政府及公共機構 Government and Public Organisation

1st

簡化資助計劃申請程序
Simplify application procedures of funding schemes

2nd

推出更多紓困措施
Introduce more support measures

3rd

加快資助計劃的審批
Accelerate processing time of funding schemes

4th

增加資助計劃金額
Increase limits of funding schemes

銀行及財務機構 Bank and Financial Institution

1st

調低貸款利率
Reduce interest rate

2nd

推出簡易貸款方案
Introduce simple loan products

3rd

加快貸款審批程序
Shorten processing time of loan applications

4th

加大貸款額度
Increase the loan amount

中小企需要的數碼科技應用項目支援:

Supports that SMEs Wish to Receive on Digital Technology Deployment:

1st

大數據整合
Big Data Integration

2nd

網絡保安
Cyber Security

3rd

流程自動化
Process Automation

4th

物聯網應用
IoT Application



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專家點評

Expert's Analysis



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2020 Q1



報告下載

Report Download

【渣打香港中小企領先營商指數】調查報告，可於SME One網站下載：

“Standard Chartered Hong Kong SME Leading Business Index” Report can be downloaded from SME One website:

www.smeone.org



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調查背景

Result background



指數介紹

Introduction



擴散指數

Diffusion Index



指數值高於**50.0**時，表示中小企對該項營商環境因素持正面態度

An index above 50.0 indicates **optimistic** business sentiment among SMEs

指數值為**50.0**時，表示中小企對該項營商環境因素持中立態度

A reading at 50.0 indicates **neutral** business sentiment among SMEs

指數低於**50.0**時，則表示中小企看淡該項營商環境因素

An index below 50.0 indicates **pessimistic** business sentiment among SMEs



調查方式

- 電話訪問
Telephone Interview
- 參考相關行業在香港的中小企數目進行分層抽樣
The sample is stratified by referencing to the number of SMEs in relevant sectors
- 本次於2019年12月進行
This survey was conducted in December 2019
- 訪問了825間本港中小企業的管理層
Management of 825 SMEs were interviewed



涵蓋行業

- 1) 製造業
Manufacturing
- 2) 進出口貿易及批發
Import/Export Trade and Wholesale
- 3) 零售業
Retail
- 4) 住宿及膳食服務
Accommodation and Catering Services
- 5) 資訊和通訊
Information and Communications
- 6) 金融及保險業
Finance and Insurance
- 7) 專業和其他商業服務
Professional and Business Services
- 8) 地產業
Real Estate

免責聲明

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