

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年第二季度

2020 Q2



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
- 探討中小企對數碼科技應用的看法及所需支援
- To explore SMEs' views on digital technology application and support required



本季重點

Key Points of this Quarter



2020

年度第二季綜合營商指數較上季下跌 6.9 至 26.2，顯示中小企的營商信心疲弱
Q2 Overall Index decreased by 6.9 from last quarter to 26.2, indicating that SMEs' confidence towards the business environment turns weak



41%

受訪中小企正利用電子/網上平台進行銷售或宣傳推廣
of surveyed SMEs use electronic/online platforms for sales or promotion



84%

受訪中小企表示於推動數碼科技應用時需要支援
of surveyed SMEs wish to receive supports when facilitating digital technology deployment

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2020 年第二季綜合營商指數

Overall Index of 2020 Q2



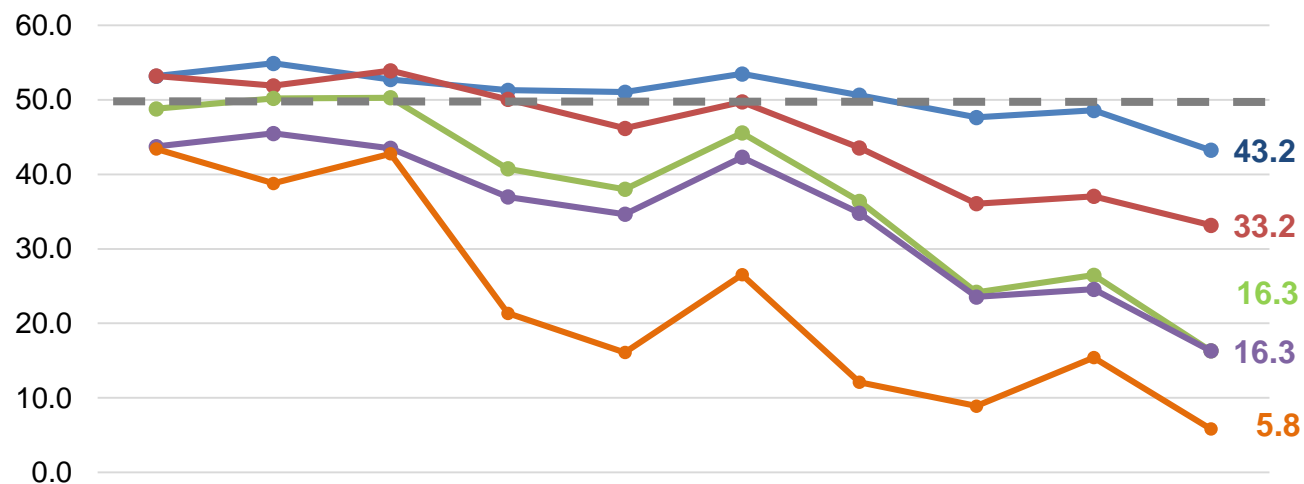
	2018 Q1	2018 Q2	2018 Q3	2018 Q4	2019 Q1	2019 Q2	2019 Q3	2019 Q4	2020 Q1	2020 Q2
綜合營商指數 Overall Index	49.4	49.7	49.7	43.0	40.4	46.0	39.0	31.4	33.1	26.2

綜合營商指數與分項指數

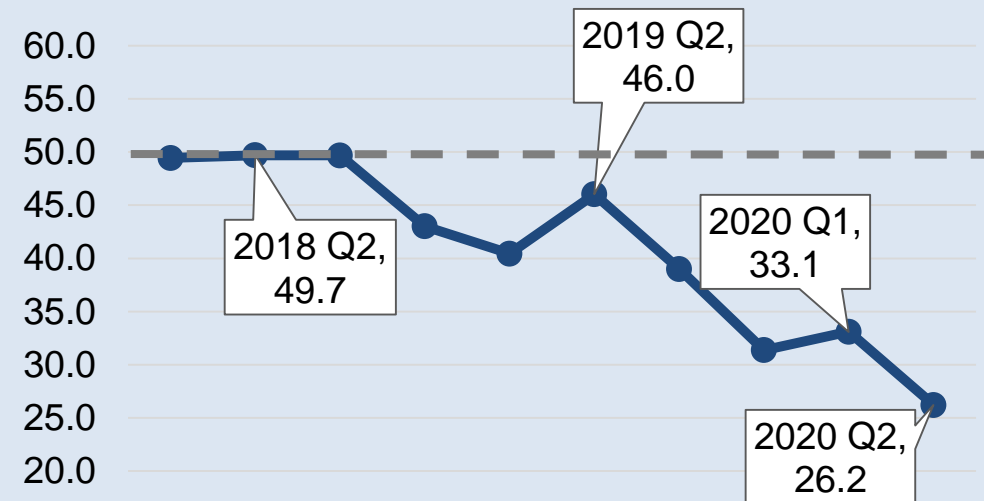
Overall Index & Component Sub-indices

- 五個分項指數均錄得下降
- 「營業狀況」錄得最明顯跌幅
- All five component sub-indices **decreased simultaneously**
- “**Business Condition**” sub-index recorded a more significant drop

分項指數表現
The Five Component Sub-Indices



綜合營商指數 Overall index



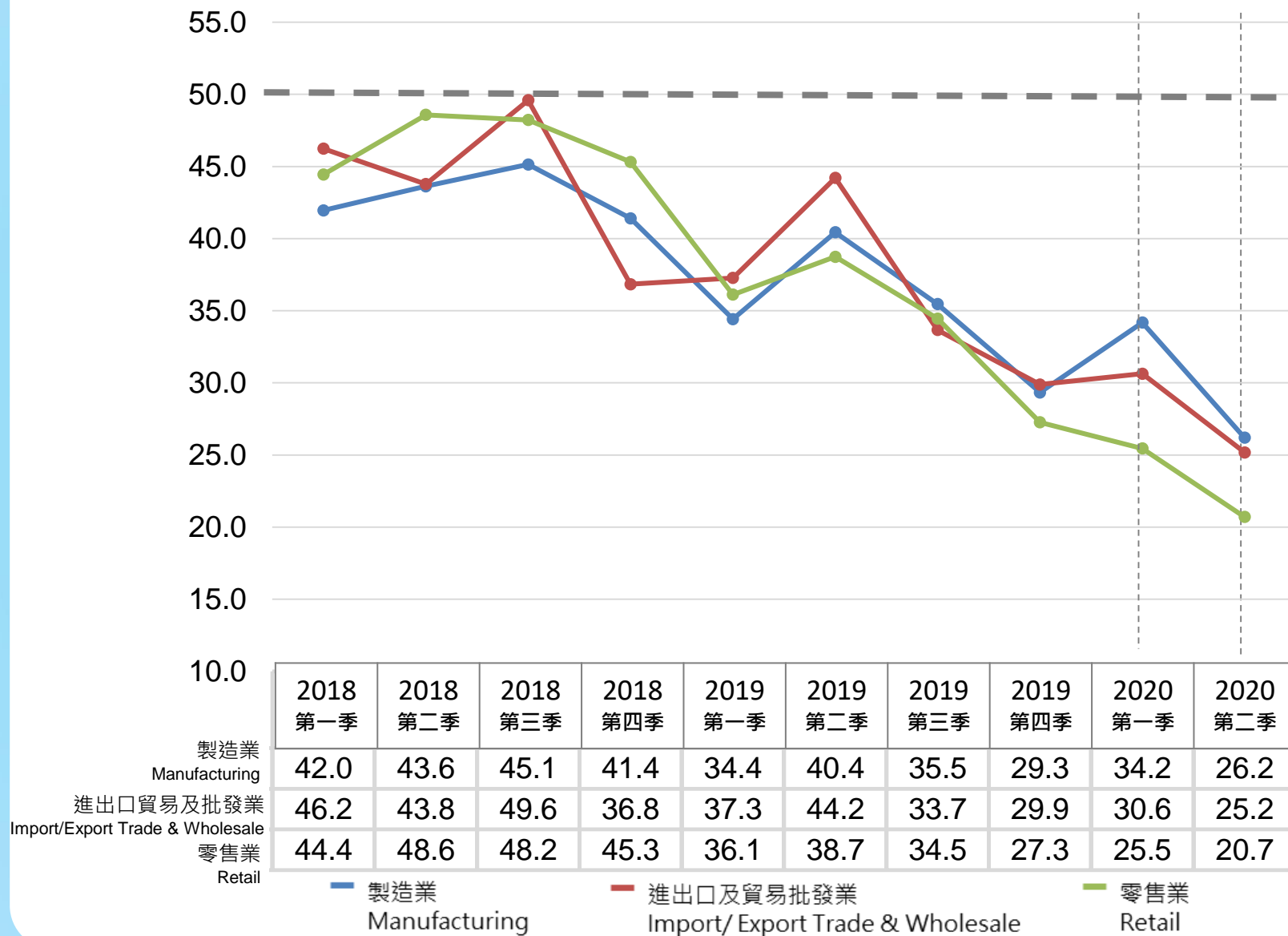
- 招聘意向
Recruitment Sentiment
- 投資意向
Investment Sentiment
- 營業狀況
Business Condition
- 盈利表現
Profit Margin
- 環球經濟
Global Economy

行業分類指數 Industry Index

- 三大行業分類指數均較上季下跌
- The 3 key industry sub-indices **decrease** simultaneously when compared to last quarter



行業分類指數表現
SME Index for Selected Industries



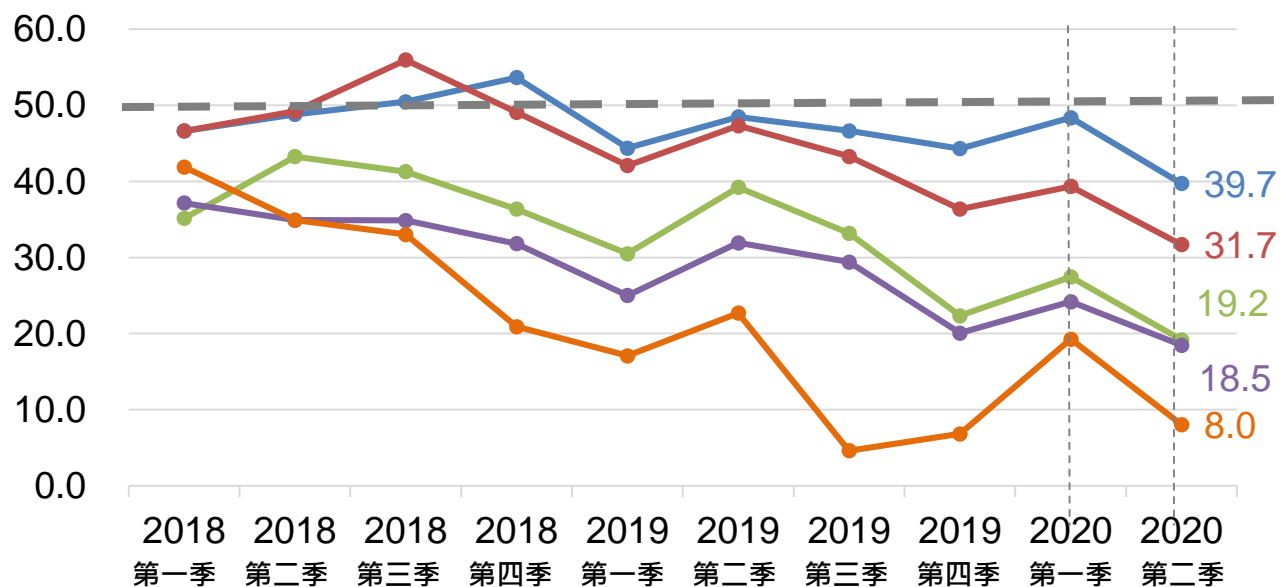
製造業

Manufacturing

- 行業指數較上季下跌 8.0 至 **26.2**
- 對比上季，所有分項指數均下跌
- 「環球經濟」錄得較明顯跌勢
- Industry sub-index decrease by 8.0 to **26.2**
- **All sub-indices drop simultaneously** when compared to Q1
- **“Global Economy”** sub-index records a more significant drop

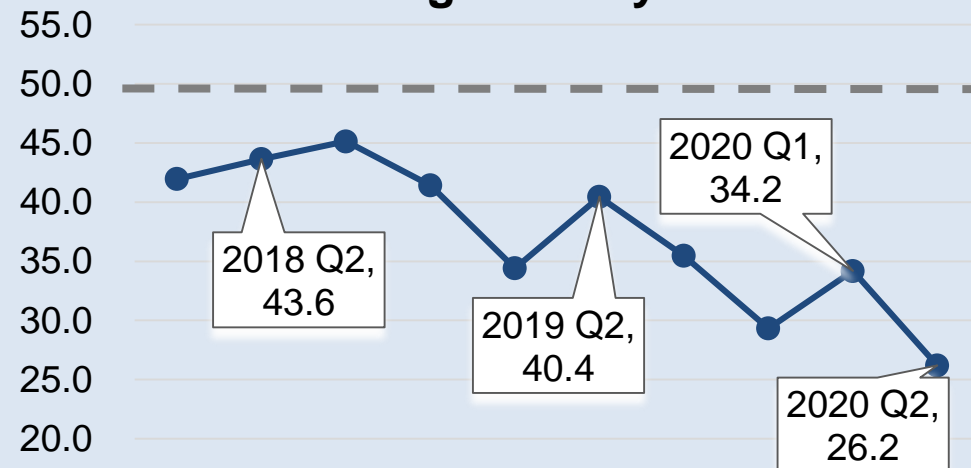
製造業分項指數表現

Component Sub-Indices of Manufacturing Industry



製造業分類指數

Manufacturing Industry Sub-Index



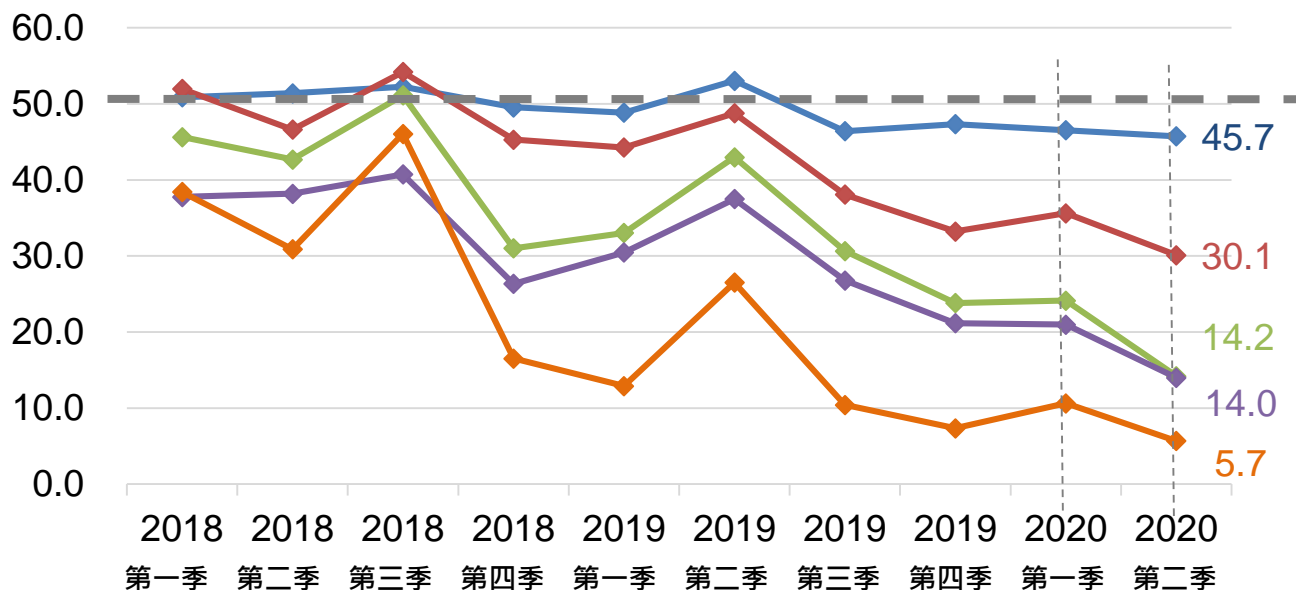
- 招聘意向
Recruitment Sentiment
- 投資意向
Investment Sentiment
- 營業狀況
Business Condition
- 盈利表現
Profit Margin
- 環球經濟
Global Economy

進出口貿易及批發業

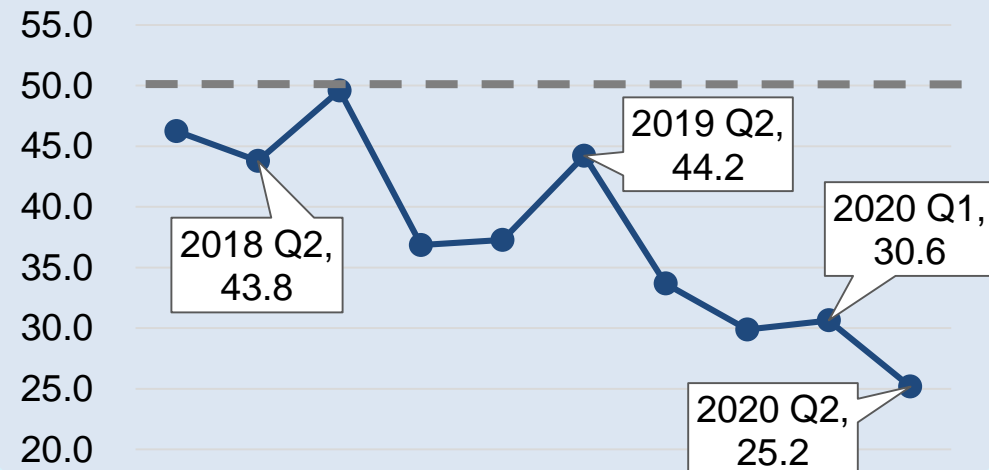
Import/ Export Trade & Wholesale

- 行業指數較上季下跌 5.4 至 **25.2**
- 對比上季，所有分項指數均下跌
- 「營業狀況」錄得較明顯跌勢
- Industry sub-index drops by 5.4 to **25.2**
- **All sub-indices fall simultaneously** when compared to Q1
- **“Business Condition”** sub-index records a steeper drop

進出口貿易及批發業分項指數表現
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



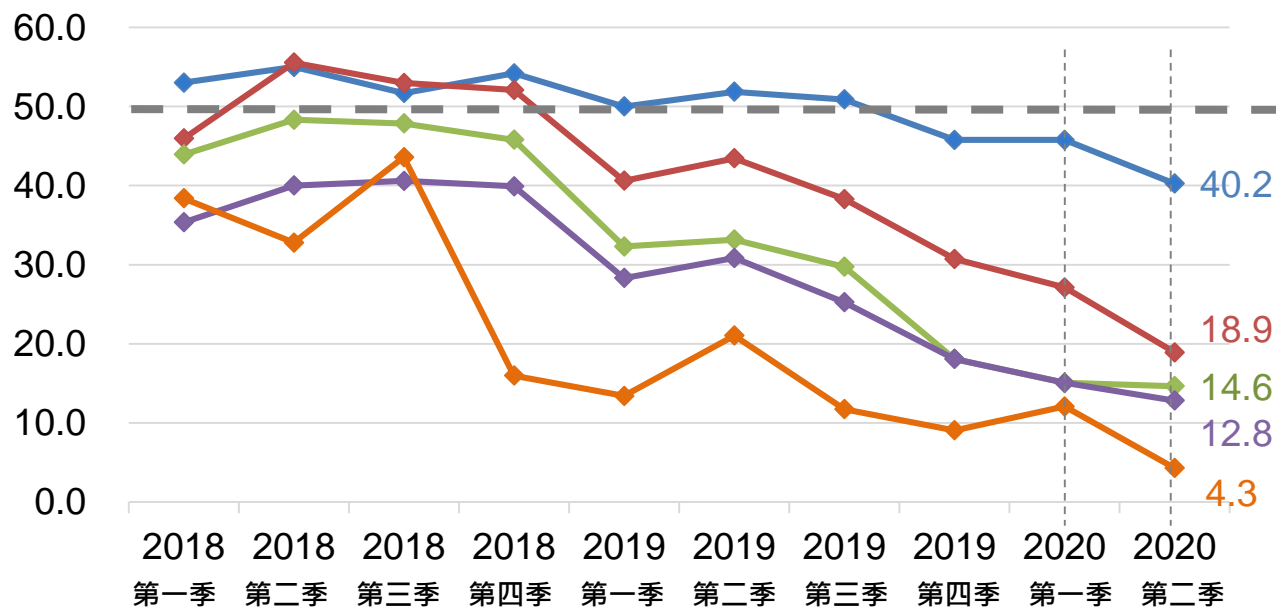
- ◆ 招聘意向
Recruitment Sentiment
- ◆ 投資意向
Investment Sentiment
- ◆ 營業狀況
Business Condition
- ◆ 盈利表現
Profit Margin
- ◆ 環球經濟
Global Economy

零售業

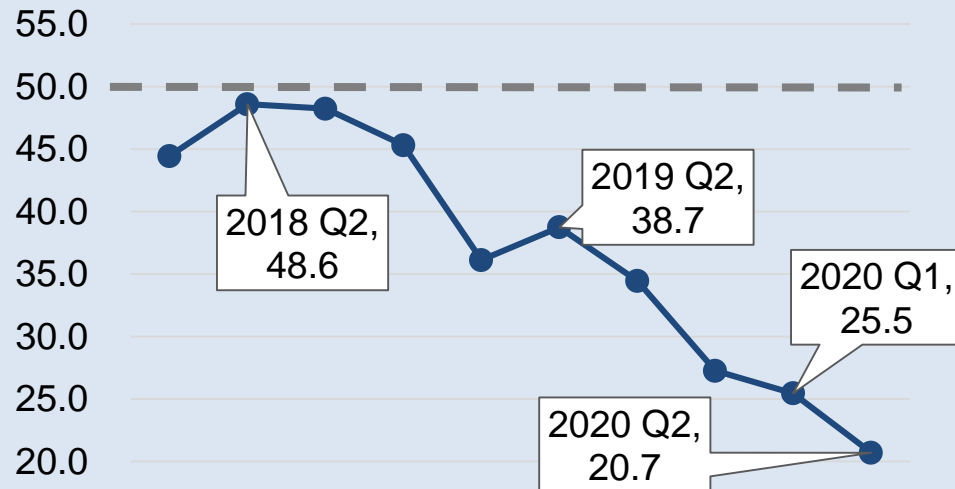
Retail

- 行業指數較上季跌 4.8 至 **20.7**
- 對比上季，**所有分項指數均下跌**
- 「投資意向」錄得較明顯跌幅
- Industry sub-index drops by 4.8 to **20.7**
- All sub-indices drop simultaneously** when compared to Q1
- “Investment Sentiment”** sub-index records a more significant drop

零售業分項指數表現
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

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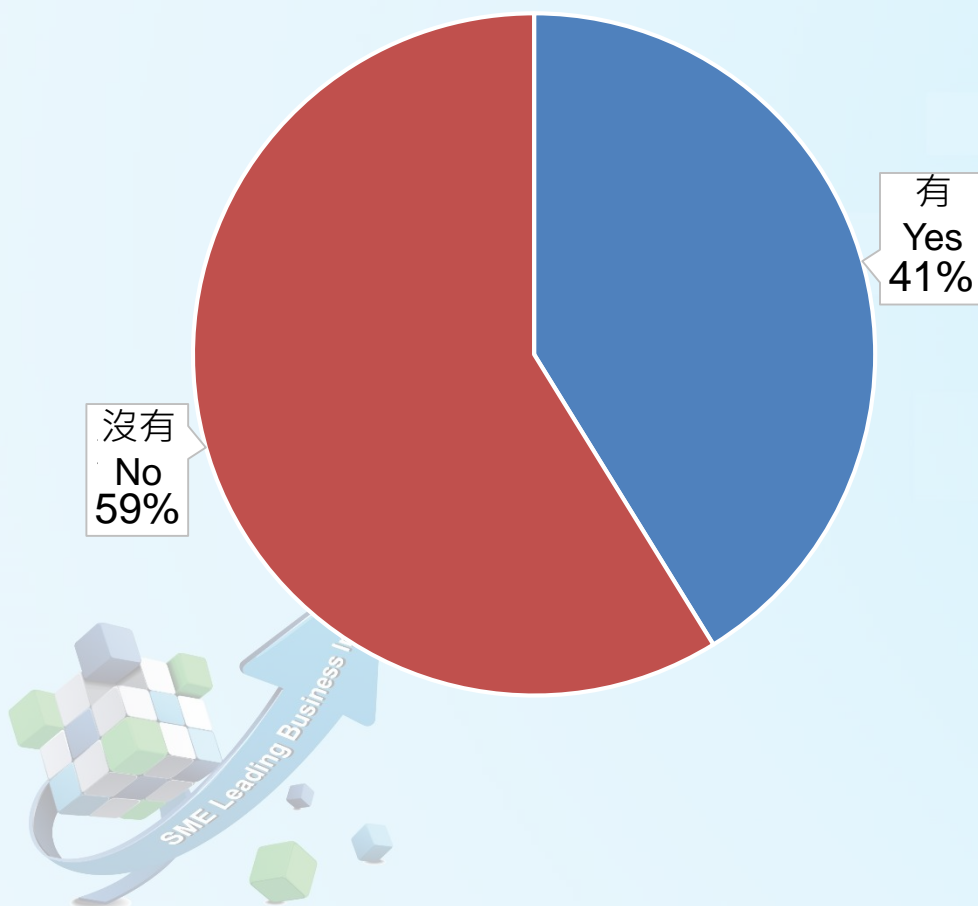
調查專題

Featured Topic



中小企利用電子/網上平台進行銷售或宣傳推廣的情況： SMEs' use of electronic/online platforms for sales or promotion:

所有行業：
All industries:



- 1 住宿及膳食服務
Accommodation and Catering Services
- 2 地產
Real Estate
- 3 零售
Retail
- 4 製造
Manufacturing
- 5 資訊及通訊
Information and Communications

中小企如何利用電子/網上平台進行銷售或宣傳推廣*:

How SMEs adopt electronic/ online platforms for sales and promotion*:

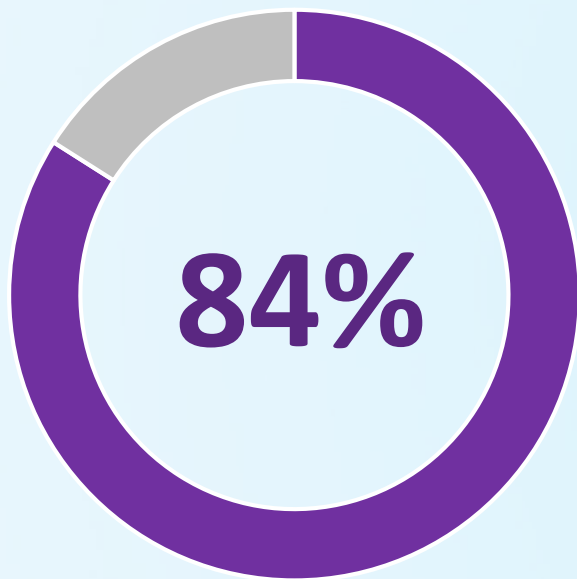


*回應有利用電子/網上平台銷售或宣傳推廣的中小企

*For SMEs who replied on using electronic /online platform to sell or promote

中小企在推動數碼科技應用時期望得到的支援:

Support expected by SMEs in facilitating digital technology deployment:



中小企表示於推動數碼科技應用時需要支援
SMEs wish to receive supports when facilitating digital technology deployment

1

合適的工具及系統建議
Appropriate tools and systems recommendations

2

企業網絡保安支援
Corporate cyber security supports

3

相關的培訓課程
Relevant training courses

4

檢視現時的數碼科技水平
Review current digital technology level

5

監管工作進度的工具或建議
Tools or recommendations on monitoring work progress

6

制定遙距工作的策略及指引
Tips and guidelines for formulating remote working

中小企實施遙距工作安排的情況：

Implementation of remote working arrangement by SMEs :

33%

認為適合

Suitable

29%

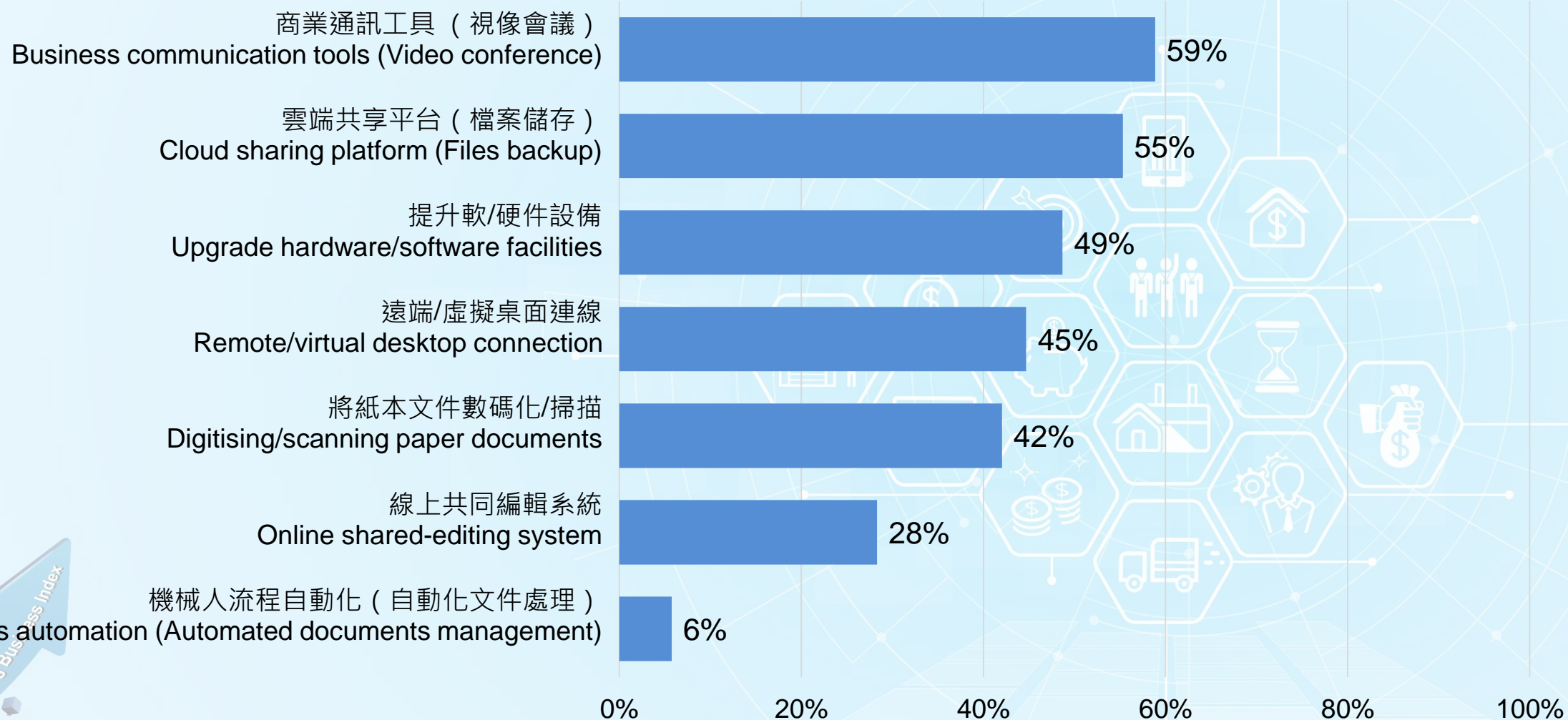
已實施

Implementing



中小企具備有助員工進行遙距工作的配套*:

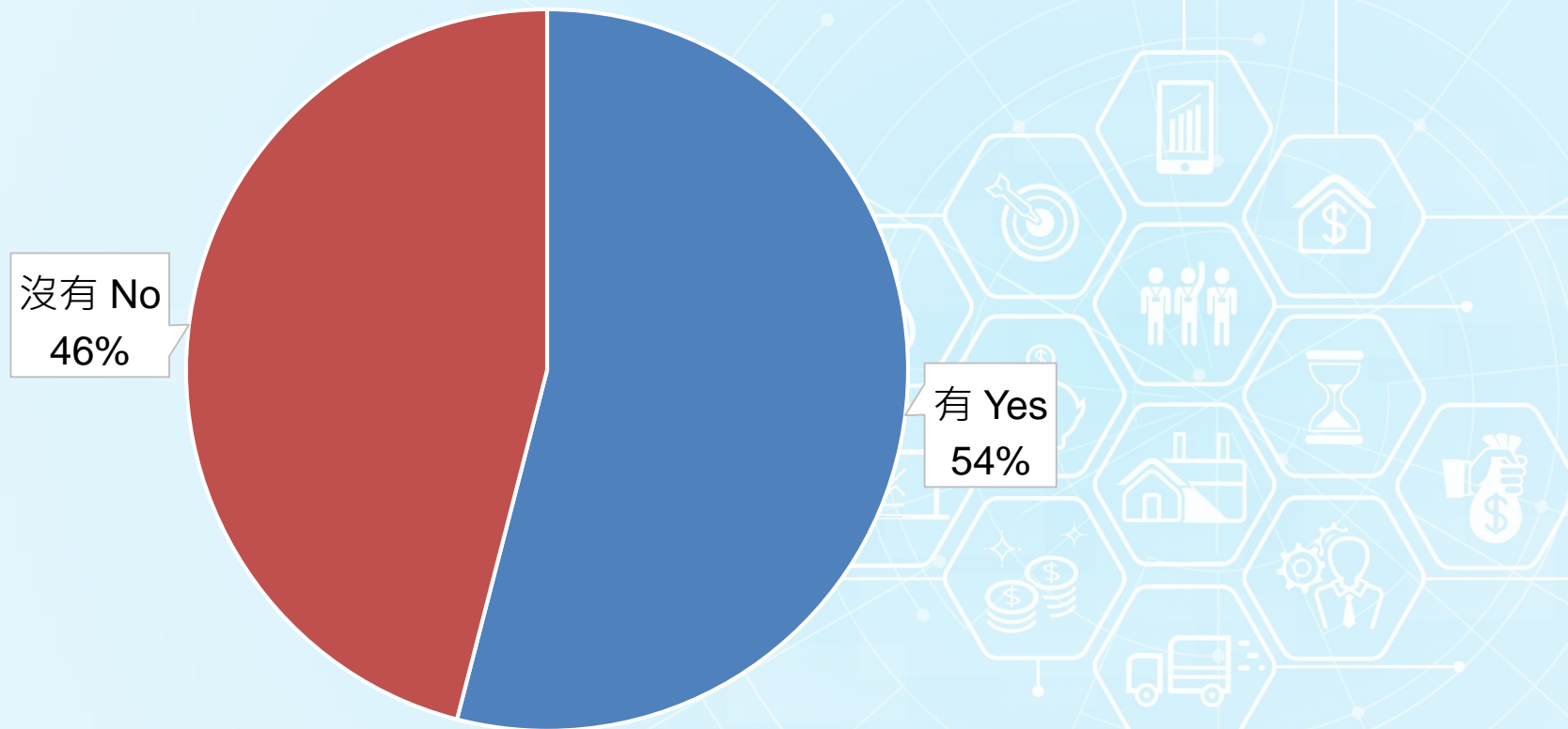
Facilities that SMEs possess to implement remote working by their staff*:



*回應遙距工作安排適合所屬行業而又具備實施遙距工作條件的中小企
*For those replied on remote working was suitable & also claimed to be equipped to implement remote working

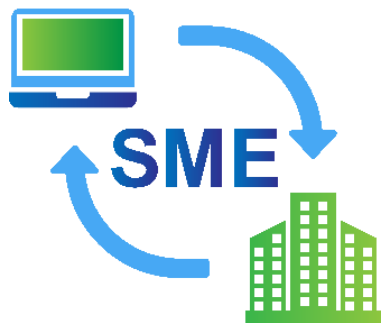
已實施遙距工作安排的中小企有否加強網路安全？*：

Do SMEs that have implemented remote working strengthen network security? *:



*回應遙距工作安排適合所屬行業而又具備實施遙距工作條件的中小企
*For those replied on remote working was suitable & also claimed to be equipped to implement remote working

生產力局的支援: Supports from HKPC:



[SME遙距工作貼士](#)
[SME Remote office tips](#)



[在家工作的六大資訊保安建議](#)
[Six security tips for home office](#)



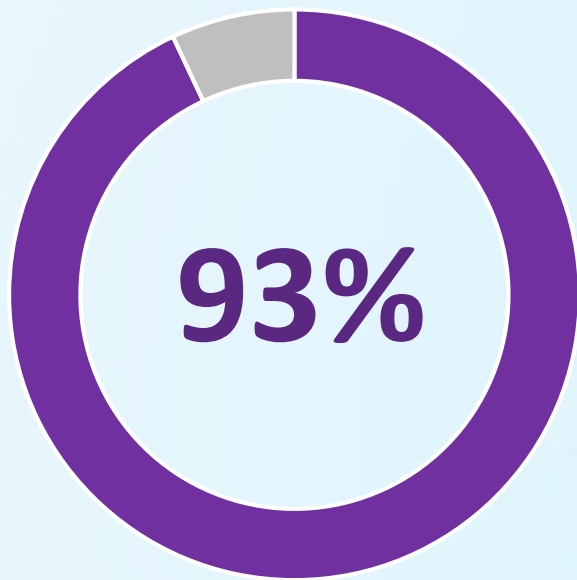
[評估遠端存取服務保安指南](#)
[Assessing the Security of Remote Access Services Guideline](#)



[10招保障網上會議安全](#)
[10 measures to secure Meetings](#)

制定落實遙距工作策略時，中小企希望得到的支援*：

Support that SMEs wish to receive when formulating remote working strategy*：



中小企表示於制定落實遙距工作策略時需要支援
SMEs wish to receive supports when implementing
remote working



- 1 資金
Funding
- 2 數碼科技應用
Digital technology deployment
- 3 有關同業應用的資訊
Related information of application in the same industry
- 4 人力資源培訓
Training on Human Resources
- 5 尋求專業合作夥伴
Sourcing for professional co-operating partners

*回應遙距工作安排適合所屬行業的中小企
*For those replied on remote working was suitable

為中小企提供資金上的支援: Funding supports for SMEs:

ReTAA5

零售業人力需求管理科技應用支援計劃
Retail Technology Adoption Assistance Scheme
for Manpower Demand Management



零售業人力需求管理
科技應用支援計劃

Retail Technology Adoption Assistance Scheme

遙距營商計劃

Distance Business Programme



科技券計劃

Technology Voucher Programme

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專家點評

Expert's Analysis



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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



調查方法

Methodology

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2020年3月進行
This survey was conducted in March 2020
- 訪問了806間本港中小企業的管理層
Management of 806 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) 專業服務
Professional and Business Services
- 8) 地產業
Real Estate



免責聲明

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