

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年第三季度

2020 Q3



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
- 探討中小企在全球經濟環境未明下的發展藍圖及所需支援
- To explore SMEs' development blueprint amid uncertain global economy and support required

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本季重點

Key Points of this Quarter



29.8

第三季綜合營商指數雖較上季輕微上升，但仍維持低位，反映中小企在疫情持續反覆下營商受到極大挑戰。

Q3 Overall Index recorded a slight increase yet still at low level, reflecting SMEs' tremendous challenges under the prevailing COVID-19 epidemic.



39%

中小企在未來12個月以專注現有市場或開拓新市場作為應對計劃。

SMEs will focus on current market or explore new market in the coming 12 months.

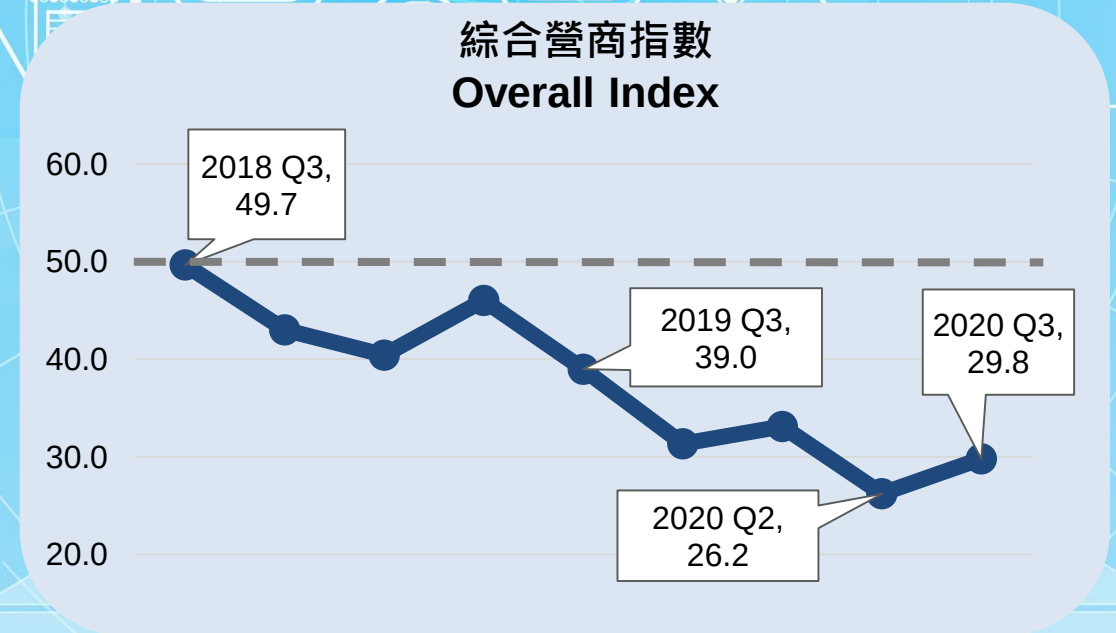


有意開拓新市場的中小企，最想開拓的市場依次為中國內地、東盟、歐洲。

For SMEs planning to expand into new market, their most desired choices are ranked as follows: Mainland China, ASEAN and European.

2020 年第三季綜合營商指數

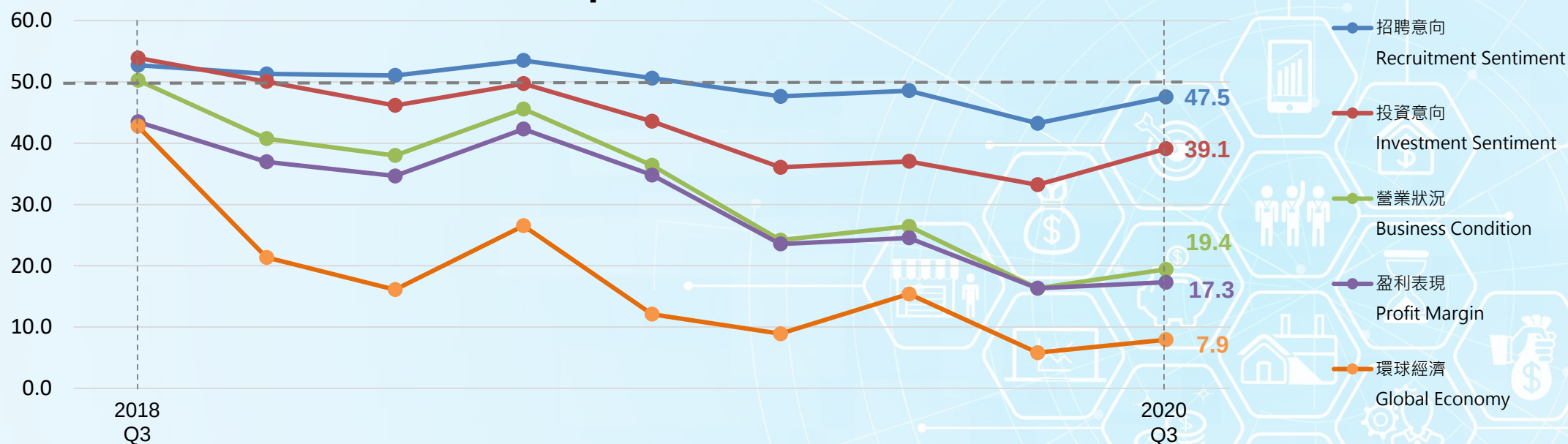
Overall Index of 2020 Q3



五大分項指數

Five Component Sub-Indices of Overall Index

綜合營商指數中的五大分項指數
Five Component Sub-Indices of Overall Index



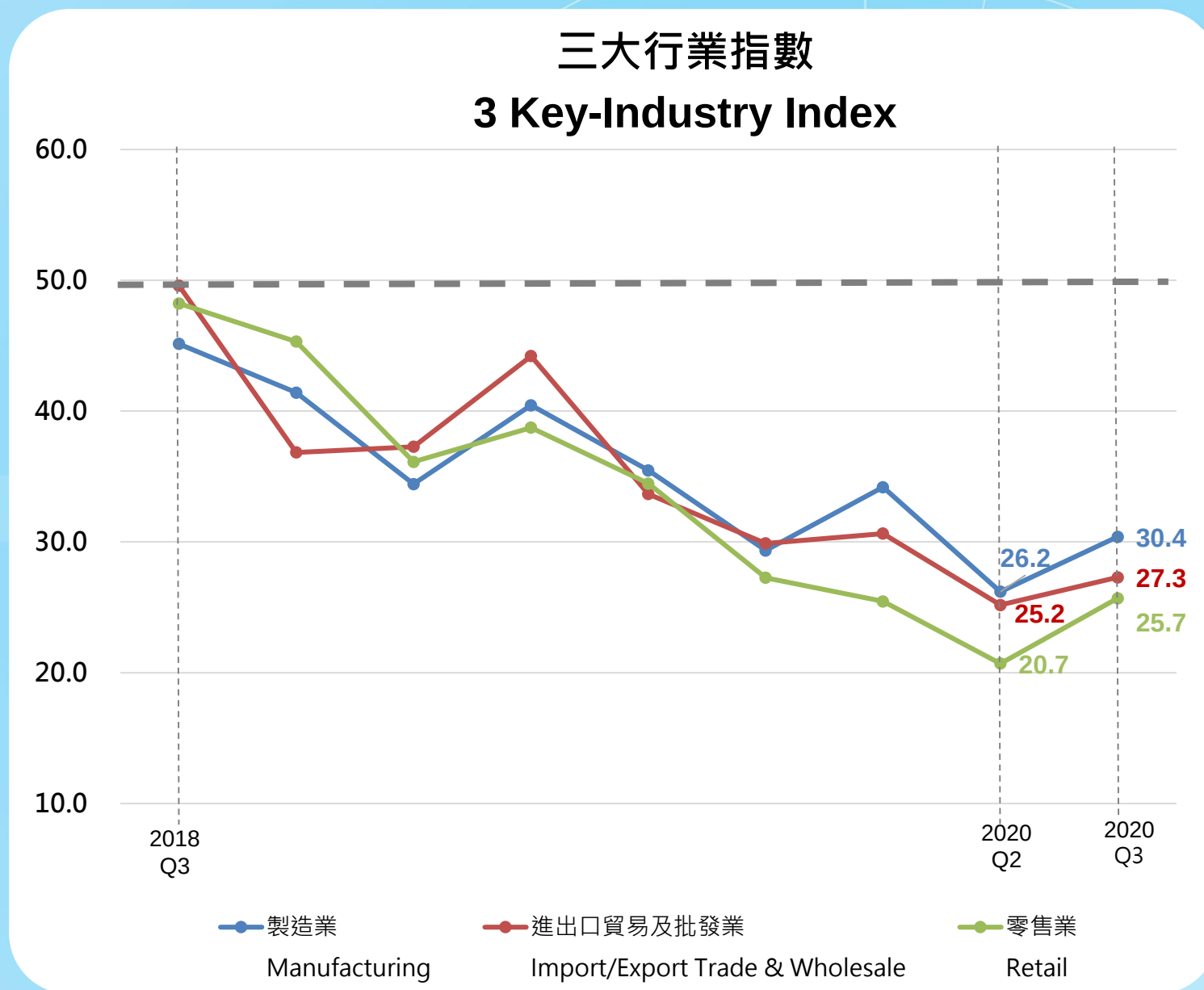
- 五大分項指數均錄得輕微上升
- 「投資意向」及「招聘意向」為帶動上升的主要因素
- All five component sub-indices slightly went up
- “Investment Sentiment” and “Recruitment Sentiment” sub-indices contributed to most of the rise



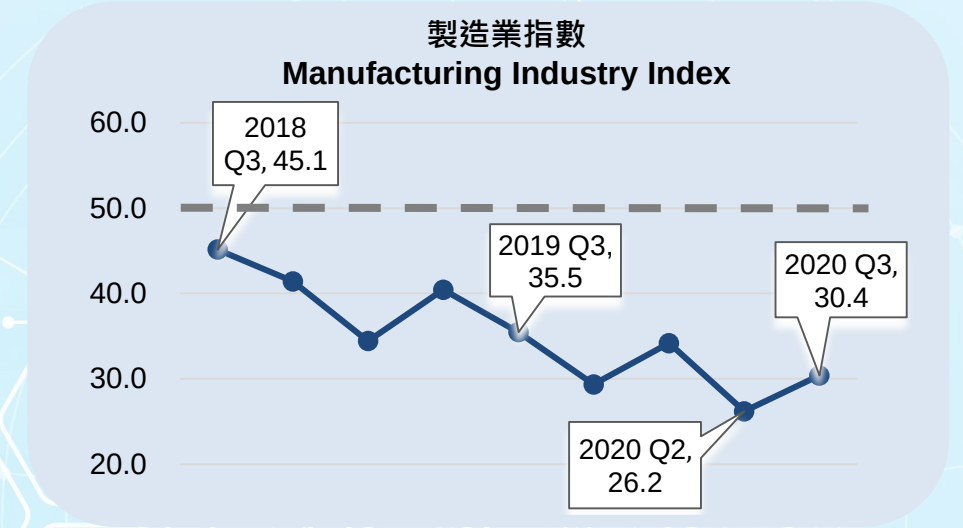
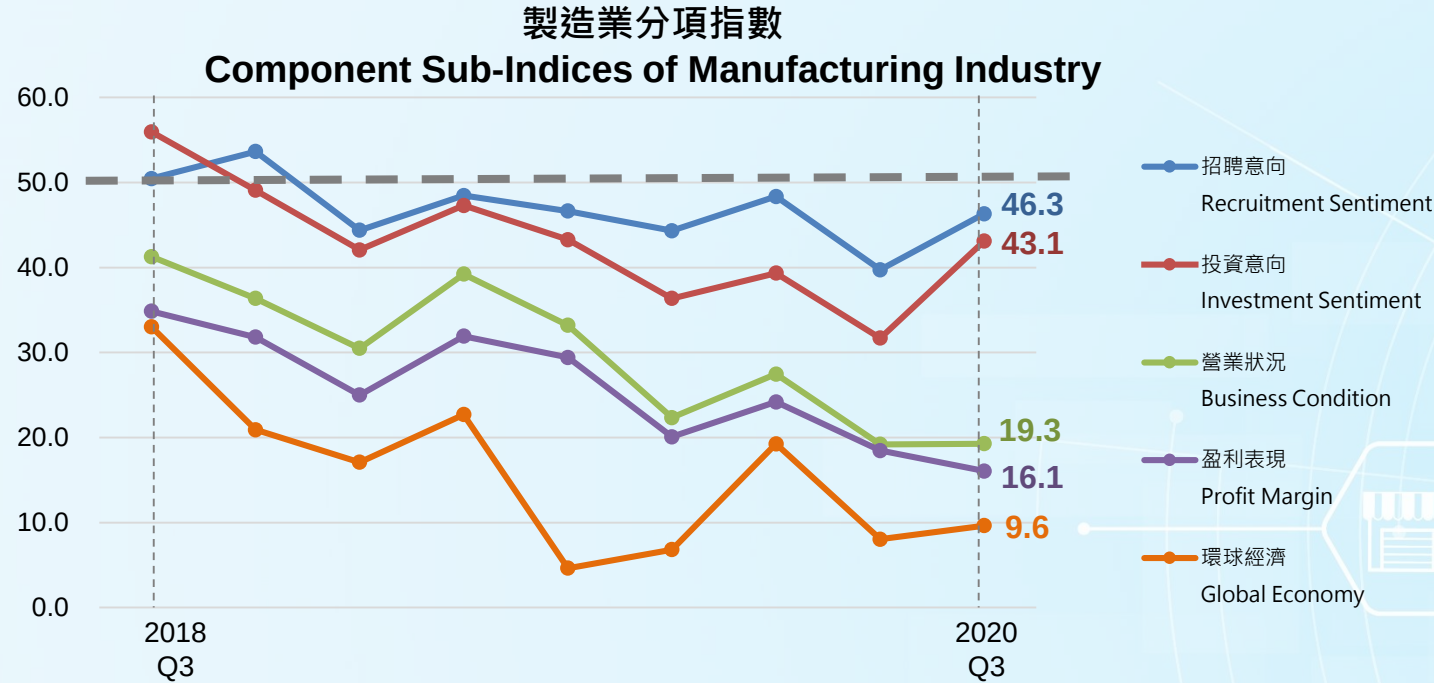
三大行業指數

3 Key-Industry Index

- 三大行業指數均較上季輕微上升
- The 3 key-industry index rose slightly when compared to last quarter



製造業 Manufacturing



- 行業指數較上季輕微上升 4.2 至 30.4
- 對比上季，「投資意向」、「招聘意向」及「環球經濟」分項指數均見上升
- 當中「投資意向」由 31.7 升至 43.1
- Industry index slightly increased by 4.2 to 30.4
- As compared to Q2, “Investment Sentiment”, “Recruitment Sentiment” and “Global Economy” sub-indices all recorded a rise
- Of which “Investment Sentiment” sub-index went up from 31.7 to 43.1

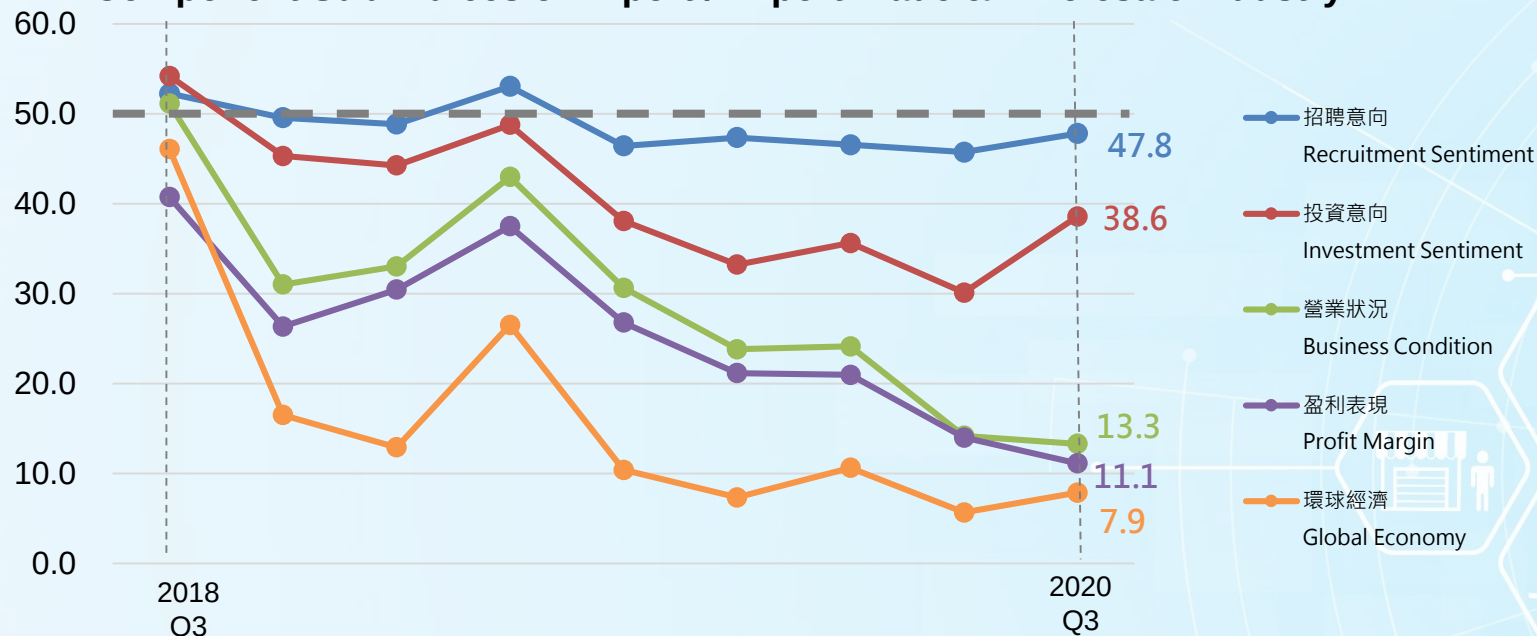


進出口貿易及批發業

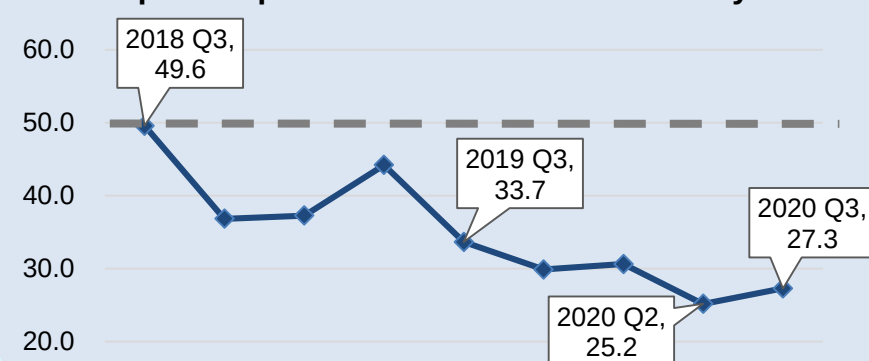
Import / Export Trade & Wholesale

進出口貿易及批發業分項指數

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



進出口貿易及批發業指數
Import/ Export Trade & Wholesale Industry Index



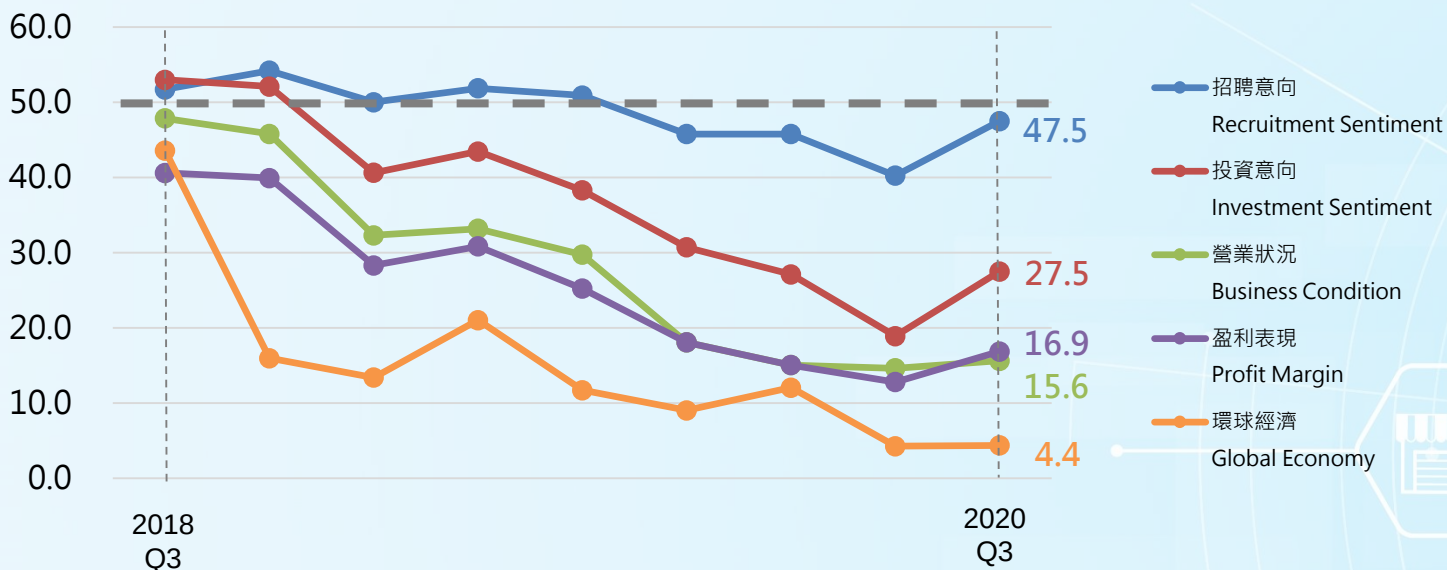
- 行業指數較上季輕微上升 2.1 至 27.3
- 對比上季，除了「營業狀況」和「盈利表現」輕微下跌，其他所有分項指數均見上升
- 「投資意向」則由 30.1 升至 38.6
- Industry index slightly increased by 2.1 to 27.3
- As compared to Q2, “Business Condition” and “Profit Margin” recorded a mild drop, whereas other sub-indices seen a growth
- “Investment Sentiment” sub-index lifted from 30.1 to 38.6



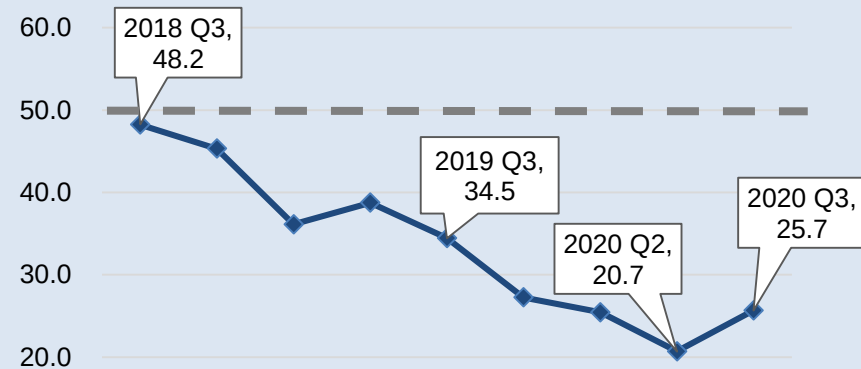
零售業 Retail

零售業分項指數

Component Sub-Indices of Retail Industry



零售業指數
Retail Industry Index



- 行業指數較上季輕微上升 5.0 至 25.7
- 對比上季，所有分項指數均錄得上升
- 「投資意向」則由18.9升至 27.5
- Industry index slightly increased by 5.0 to 25.7
- All sub-indices recorded a rise as compared to Q2
- “Investment Sentiment” sub-index surged from 18.9 to 27.5



市場展望

Market Observations

中小企預期第三季營業額 SMEs' Expectation towards Turnover in Q3

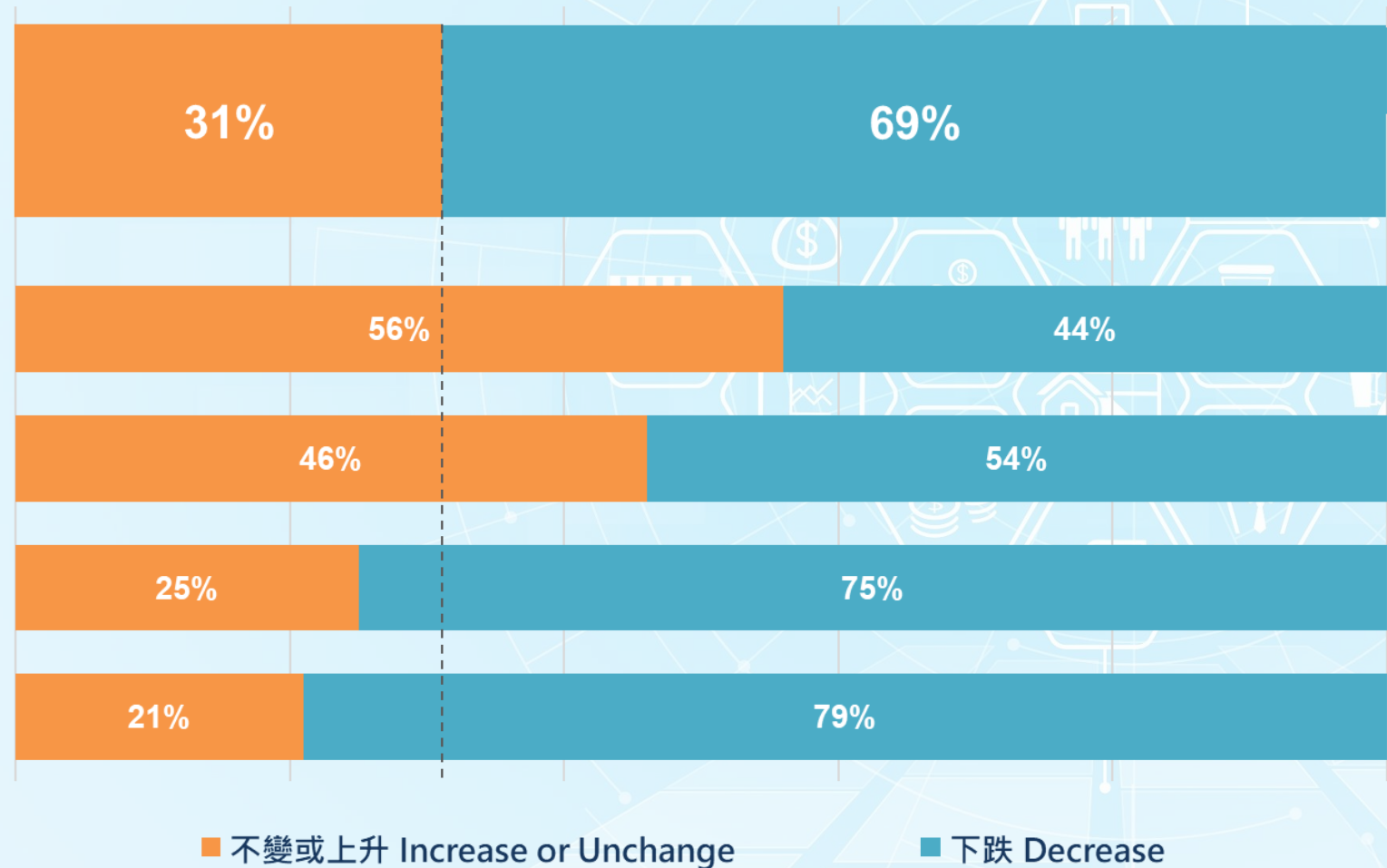
所有行業
All Industries

金融及保險業
Financial & Insurance

資訊及通訊業
Information & Communications

零售業 / 旅遊業
Retail / Tourism

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



市場展望

Market Observations

預期第三季會調整投資額中小企的意向

Intentions of SMEs with Adjustment to Investment Spending in Q3

上升或維持
Increase or Remain

77%

研發項目
R&D Projects

76%

資訊科技系統
Information Technology System

下降
Decrease

46%

庫存
Inventory

40%

辦公室 / 廠房 / 店舖
Office / Factory / Shop

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調查專題

Featured Topic

中小企在全球經濟環境未明下的發展藍圖

SMEs' Development Blueprint amid Uncertain Global Economy



中小企在全球經濟環境未明下的應對計劃

SMEs' Game Plan amid Uncertain Global Economy

39%

中小企在未來12個月以專注現有市場或開拓新市場作為應對計劃

SMEs will focus on current market or explore new market in the coming 12 months



中小企在全球經濟環境未明下的應對計劃

SMEs' Game Plan amid Uncertain Global Economy

35%

中小企在預期營業額下降的情況下仍未有應對計劃

SMEs have no game plan despite an expectation in deteriorating turnover

1

活動策劃及展覽業
Event Planning, Exhibition

2

旅遊業
Tourism

3

建築及工程等其他行業
Construction/Engineering & Others



受訪中小企在全球經濟環境未明下預計業務受影響時間

SMEs' Estimated Impact Time amid Uncertain Global Economy

暫未有應對計劃的中小企
預計業務受影響時間

Impacted time estimated by SMEs
currently with no game plan

平均 Avg

10個月
months



有意開拓新市場的中小企

For SMEs Planning to Expand into New Markets

未來十二個月中小企最想開拓的新市場

Most Desired Markets for SMEs' New Market Expansion in Next 12 Months

1

中國內地
Mainland China



2

東盟
ASEAN



3

歐洲
European



有意開拓新市場的中小企

For SMEs Planning to Expand into New Markets

在未來十二個月最想開拓上述市場的原因

Reasons for Choosing those Markets in Next 12 Months

市場機會較多

More Market
Opportunities

有當地合作夥伴

With Local Partners

營商環境配合

Suitable Business
Environment



有意開拓新市場的中小企

For SMEs Planning to Expand into New Markets

開拓市場的方式

Most Desired Approaches to Expand

1

選用當地代理/
合作夥伴
Engage
Local Agent / Partner

2

利用網上商店/
電子商貿
(不在當地作任何投資)
Leverage Online Store/
E-commerce
(No Local Investment)

3

當地合夥經營
(如成立合資公司)
Form
Local Partnership
(e.g. Joint-venture)



有意開拓新市場的中小企

For SMEs Planning to Expand into New Markets

需要得到的幫助 Required Support

1

資金
Funding

2

資訊/數碼科技
Information /
Digital Technology

3

相關人才
Relevant Talents



中小企對於利用香港特區政府支援計劃的看法

SMEs' Views on HKSAR Government's Support Programmes

77%

中小企會利用香港特區政府支援計劃推行其發展藍圖

SMEs indicated to leverage the HKSAR Government's support programmes for blueprint implementation





4 大技術服務 Technical Services

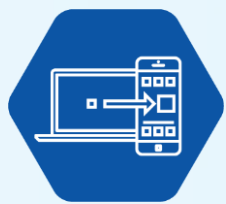
- 1 廠房布局設計及生產力提升
Plant Layout Design and Productivity Enhancement
- 2 當地環保法規資訊及建議
Local Environment Regulations Compliance Advisory
- 3 技術支援
Technical Support
- 4 產品測試及合規要求
Product Testing & Compliance



3 大支援 Support Services

- 1 大灣區大講堂
GBA Seminars
- 2 香港再工業化及東盟製造業發展指南 – 機遇與挑戰
Guide to Hong Kong's Reindustrialisation & ASEAN - Opportunities and Limitations in Manufacturing
- 3 生產力學院課程
HKPC Academy Courses

抗逆轉型 Transformation



遙距工作貼士
Remote Working Tips



HKPC Live 網絡研討會
HKPC Live Webinars



中小企資援組
《資助基金推廣全面觀2020》
SME ReachOut
Fund Fair Everywhere 2020

再工業化 Reindustrialisation



培訓及諮詢
Training and Consultation



智能生產技術支援
Smart Production Technical Support



數碼轉型方案
Digital Transformation Solutions

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專家點評

Expert's Analysis



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2020年第三季度
2020 Q3



報告下載

Report Download

【渣打香港中小企領先營商指數】調查報告，可於生產力局網站下載：

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

<https://u.hkpc.org/scbi-hk>



渣打香港中小企領先營商指數

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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 7 月進行
This survey was conducted in July 2020
- 訪問了 814 間本港中小企業的管理層
Management of 814 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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