



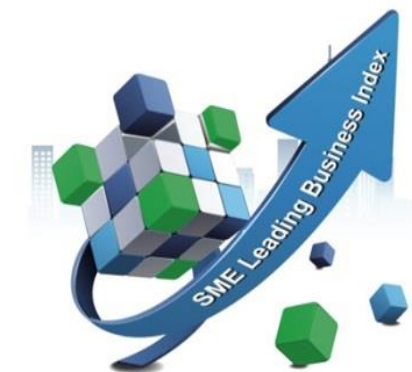
# 渣打香港中小企領先營商指數

Standard Chartered Hong Kong SME Leading Business Index

## 調查結果

Results

2019年第三季度  
2019Q3



# 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
- 探討企業應對環球經濟波動的措施
- To explore how SMEs cope with the fluctuating global economy



# 本季重點

## Key Point in this Quarter



2019年度第三季的綜合營商指數較上季下跌7.0至 **39.0**

2019 Q3 Overall Index dropped by 7.0 from last quarter, reading at 39.0



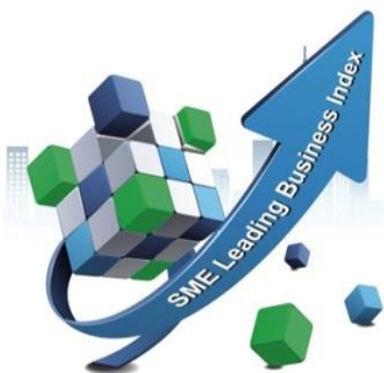
指數屬三年以來**低位**

The index reached a three-year-low



顯示中小企的營商信心呈現較大幅度的下跌

Indicated a significant drop in SMEs' confidence in the business environment



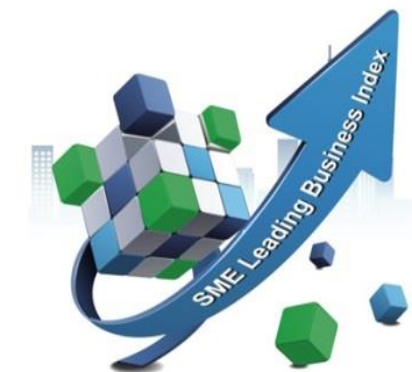


# 渣打香港中小企領先營商指數

Standard Chartered Hong Kong SME Leading Business Index

## 調查結果

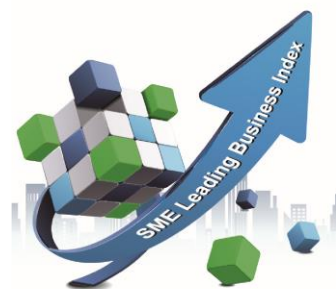
Results





# 2019 年第三季重點指數

## Key Indices in 2019 Q3



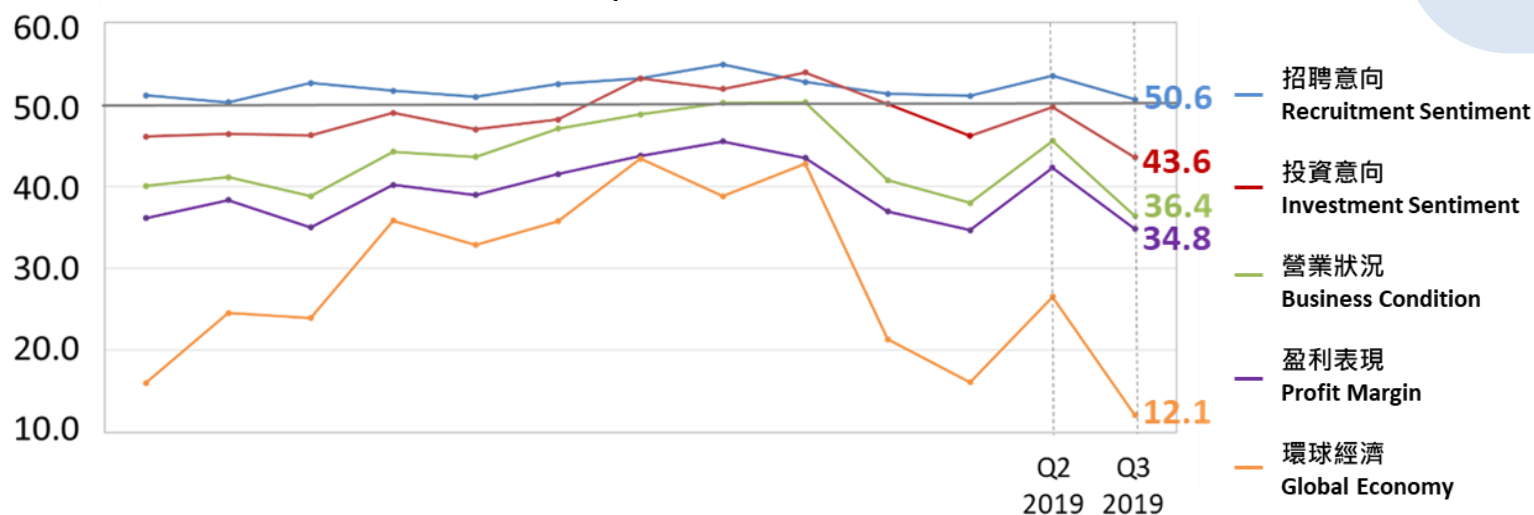
	2016 Q3	2016 Q4	2017 Q1	2017 Q2	2017 Q3	2017 Q4	2018 Q1	2018 Q2	2018 Q3	2018 Q4	2019 Q1	2019 Q2	2019 Q3
綜合營商指數 Overall Index	41.1	42.5	41.9	45.6	44.3	46.5	49.4	49.7	49.7	43.0	40.4	46.0	39.0

# 綜合營商指數與分項指數

## Overall Index & Component Sub-Indices

- 五個分項指數錄得全線下跌
- 其中「招聘意向」(50.6) 維持正面水平
- All five sub-indices **dropped simultaneously**
- “Recruitment Sentiment” sub-index (50.6) maintained at **positive** level

分項指數表現  
The Five Component Sub-Indices



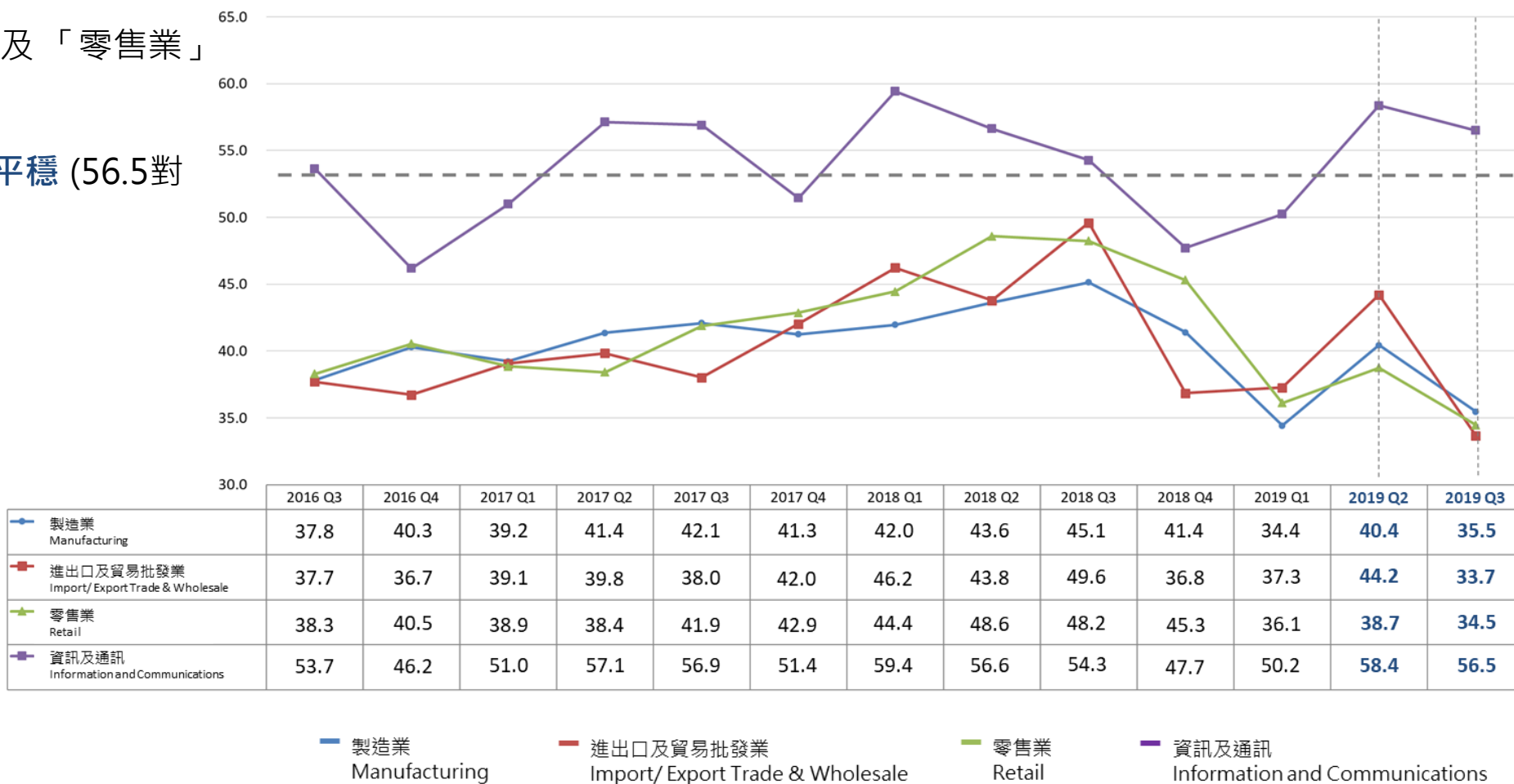
綜合營商指數  
Overall Index



# 行業分類指數 Index by Industry

- 對比上季，**三大行業分類指數均下跌**
- 其中「進出口及貿易批發業」及「零售業」分類指數屬三年以來低位
- 「資訊及通訊」分類指數**相對平穩** (56.5對比上季58.4)
- The sub-indices of the 3 major industries decreased** simultaneously when compared to last quarter
- Sub-indices for “Import/ Export Trade & Wholesale” and “Retail” reached a three-year-low
- Sub-index for “**Information and Communications**” is **relatively stable** (56.5 when compared to last quarter 58.4)

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

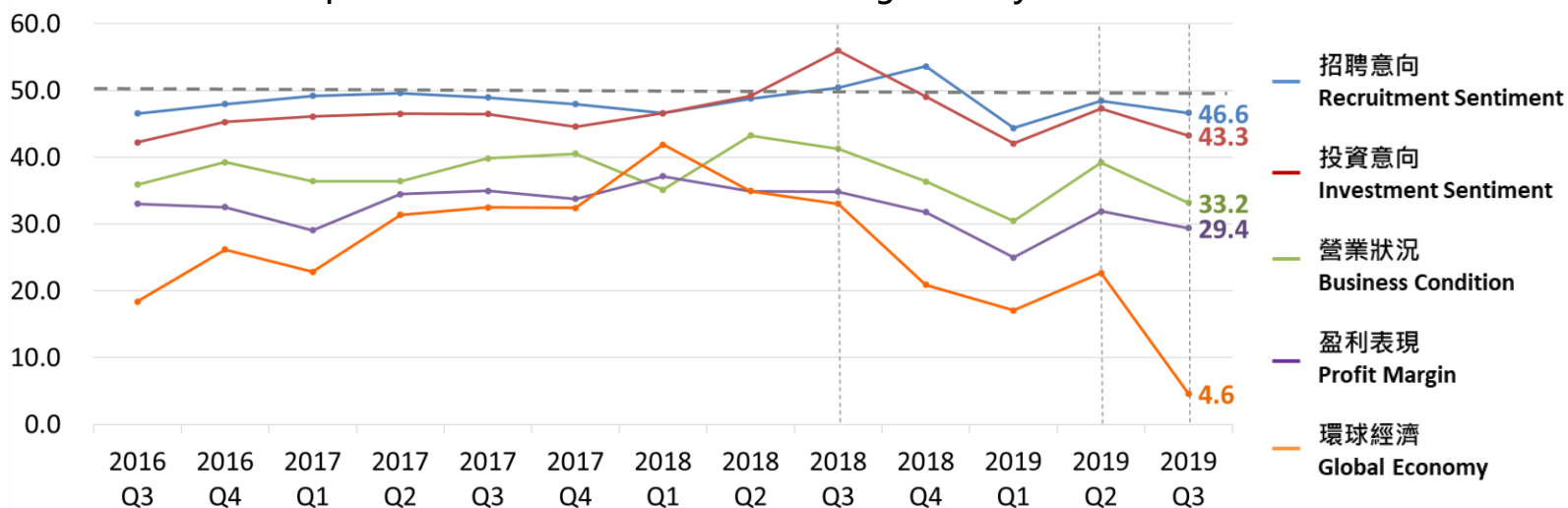


# 製造業

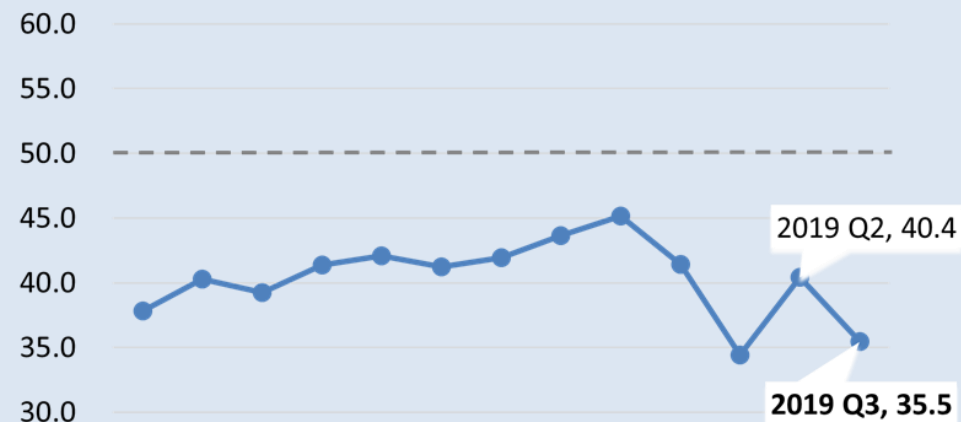
## Manufacturing

- 行業指數較上季跌4.9至**35.5**
- 對比上季，**所有分項指數均下跌**
- Industry sub-index dropped 4.9 to **35.5**
- All sub-indices dropped simultaneously** when compared to last quarter

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

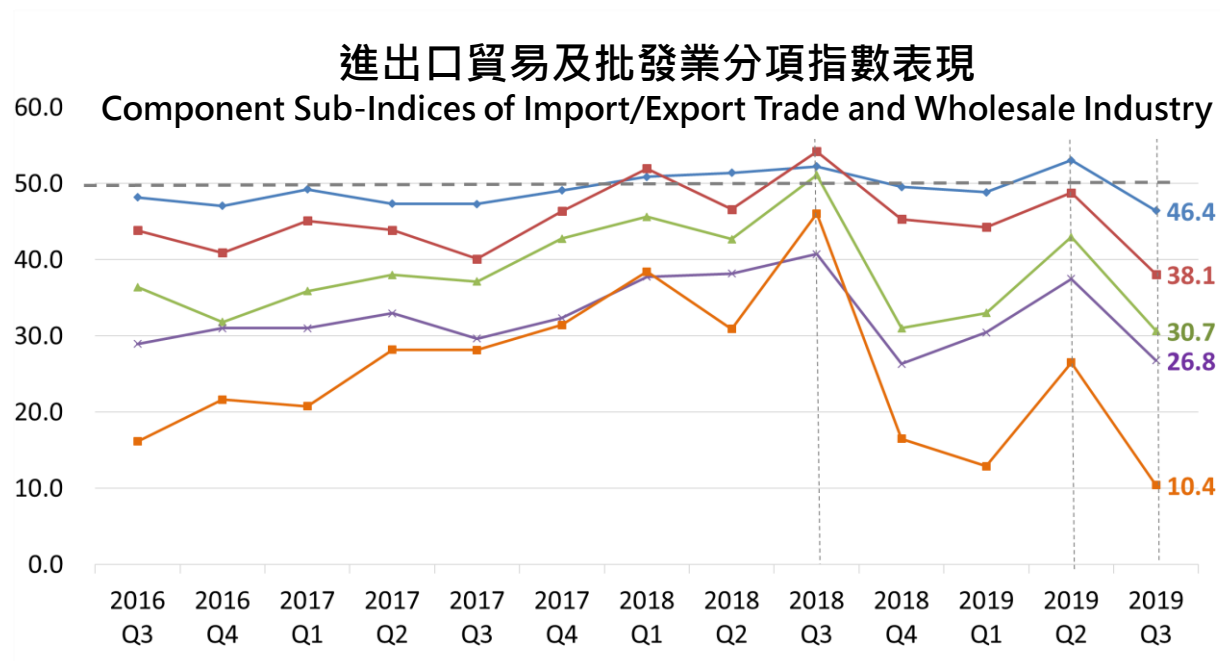




# 進出口貿易及批發業

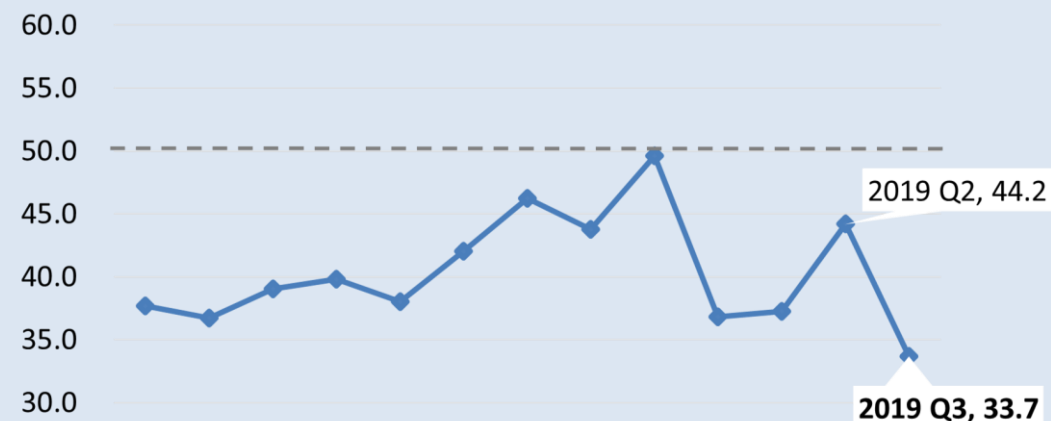
## Import/ Export Trade & Wholesale

- 行業指數較上季大跌10.5至**33.7**，屬三年以來低位
- 對比上季，**所有分項指數均下跌**
- Industry sub-index dropped 10.5 to a three-year-low at **33.7**
- All sub-indices dropped simultaneously** when compared to last quarter



進出口貿易及批發業分類指數

Import/ Export and Wholesales Industry Sub-Index

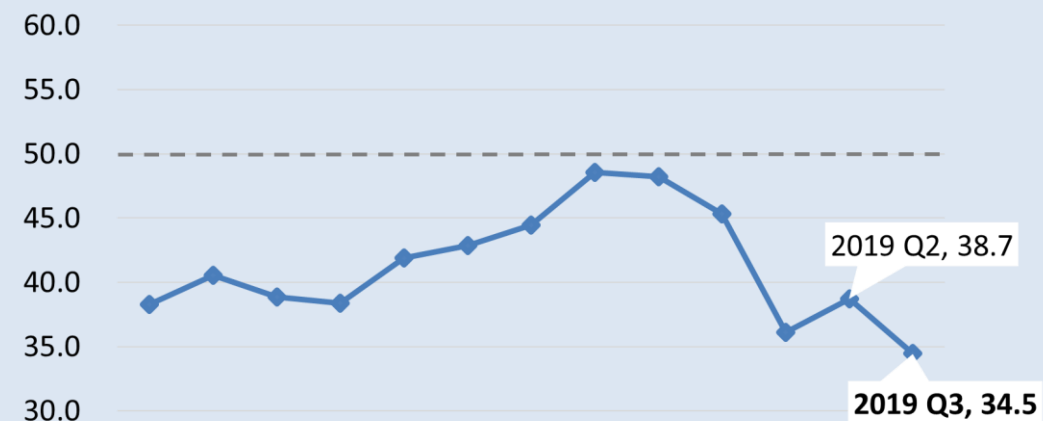


# 零售業

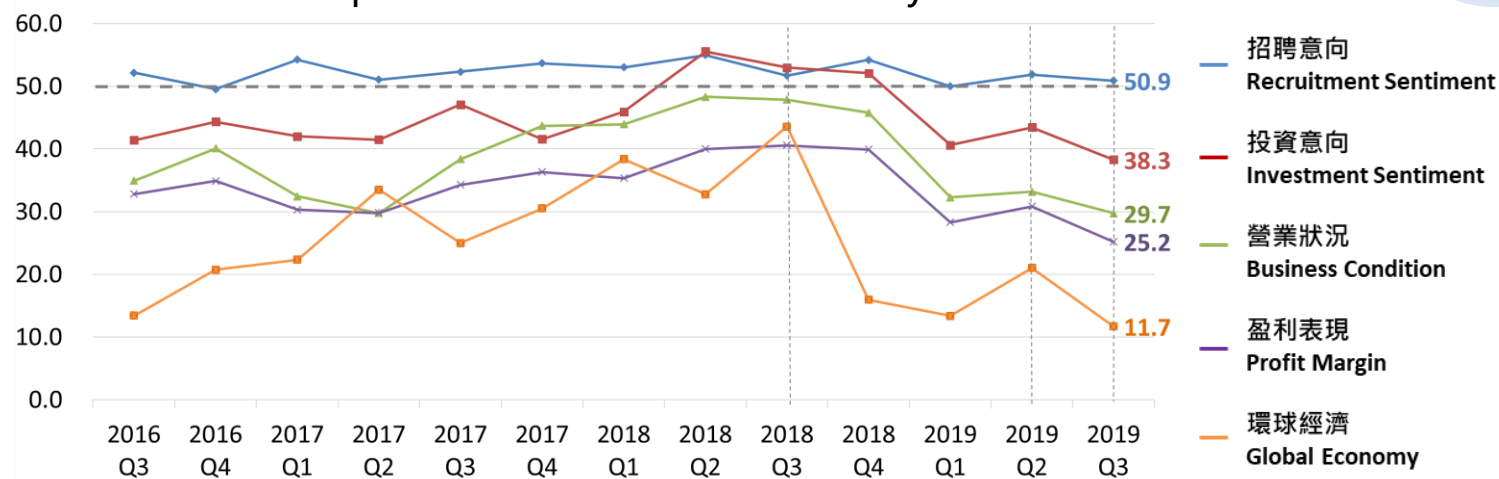
## Retail

- 行業指數較上季跌4.2至**34.5**，屬三年以來低位
- 對比上季，**所有分項指數均下跌**
- Industry sub-index dropped 4.2 to a three-year-low at **34.5**
- All sub-indices dropped simultaneously** when compared to last quarter

零售業分類指數  
Retail Industry Sub-Index



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

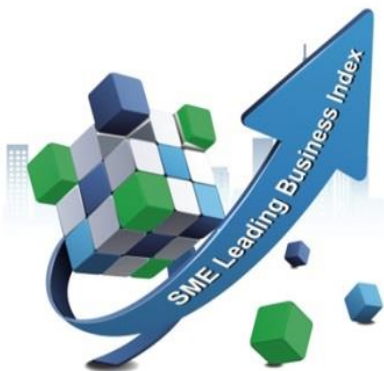


# 渣打香港中小企領先營商指數

Standard Chartered Hong Kong SME Leading Business Index

## 調查專題

Featured Topic



# 中小企對環球經濟波動的應對

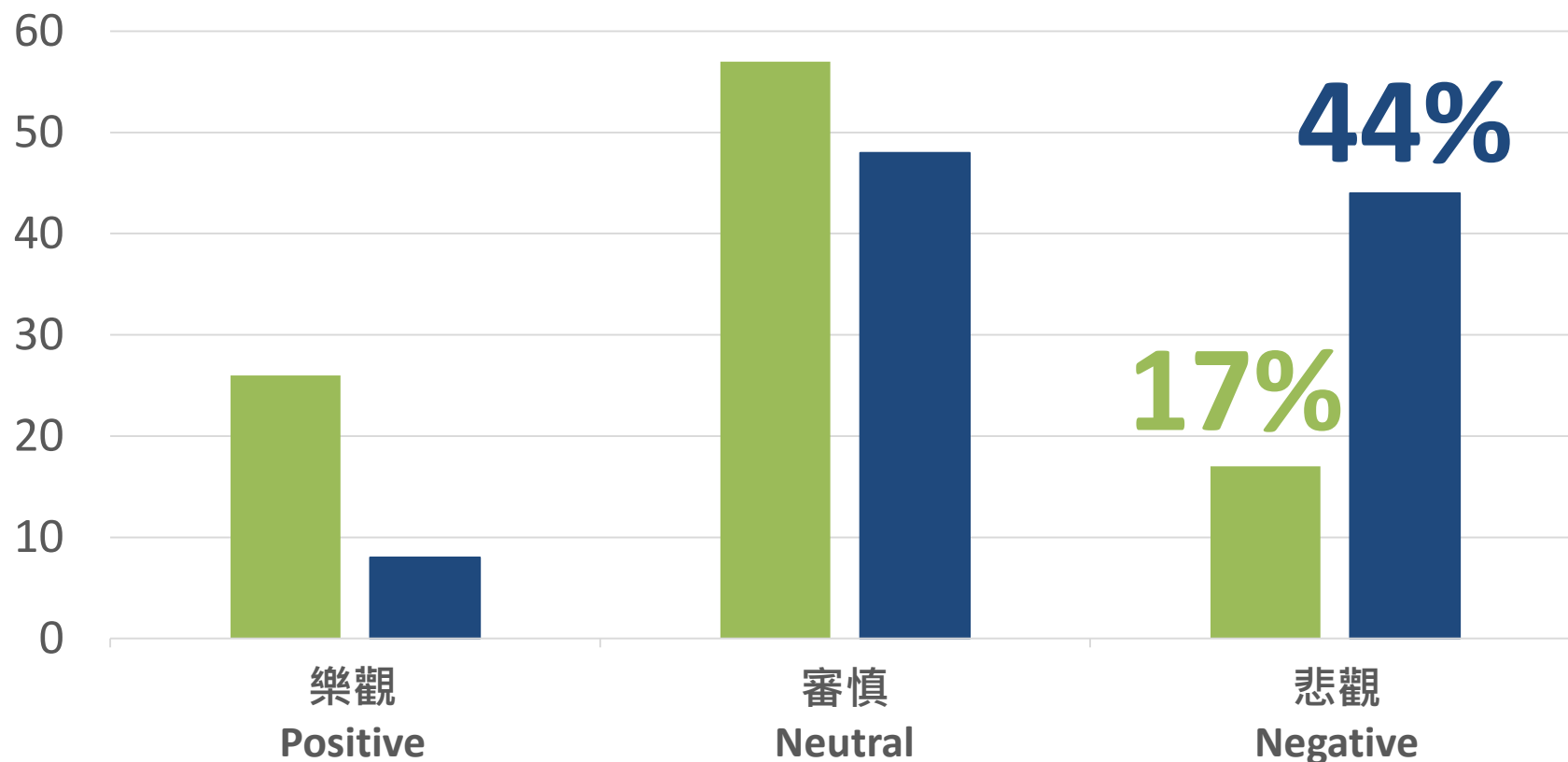
## How SMEs Cope With the Fluctuating Global Economy

中小企對國際貿易談判發展趨勢的看法：

SMEs' views on the trend of international trade negotiation:

2019 Q2

2019 Q3



# 中小企對環球經濟波動的應對

## How SMEs Cope With the Fluctuating Global Economy

中小企的應對方法：  
SMEs' solutions:

1<sup>st</sup>

提升團隊能力  
Increase staff capability

2<sup>nd</sup>

發展新產品或服務  
Develop new product or  
service

3<sup>rd</sup>

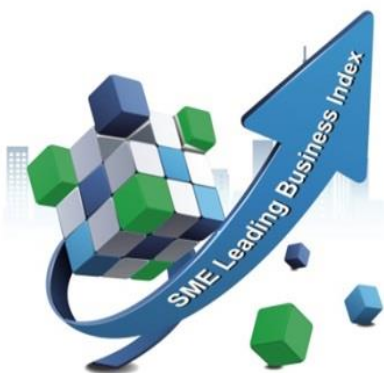
擴增現有市場  
Expand current market

4<sup>th</sup>

開拓新市場  
Explore new market

5<sup>th</sup>

投資科技發展  
Invest on technology





# 中小企對環球經濟波動的應對

## How SMEs Cope With the Fluctuating Global Economy

中小企希望得到的支援:

Supports that SMEs wish to receive:

1<sup>st</sup>

宣傳推廣  
Marketing and promotion

2<sup>nd</sup>

人才吸納及培訓  
Talent acquisition and training

3<sup>rd</sup>

財務安排  
Financial arrangement

4<sup>th</sup>

科技應用  
Technology application

5<sup>th</sup>

對新市場的認知  
Knowledge about new market

6<sup>th</sup>

法規知識  
Regulatory knowledge



# 中小企對環球經濟波動的應對

## How SMEs Cope With the Fluctuating Global Economy

中小企有興趣拓展業務的市場：

Markets that SMEs are interested for expansion:



粵港澳大灣區

Guangdong-Hong Kong-Macao Greater Bay Area



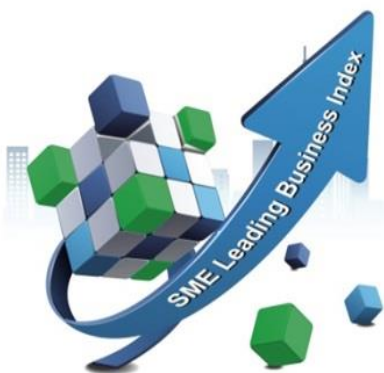
中國內地 (大灣區以外地方)

Mainland China (Except Greater Bay Area)



馬來西亞

Malaysia



# 中小企對培育及挽留人才的部署

## SMEs' Staff Training and Retaining Plan

中小企認為最有效挽留人才的措施：  
Most effective ways to retain talents for SMEs:

1st

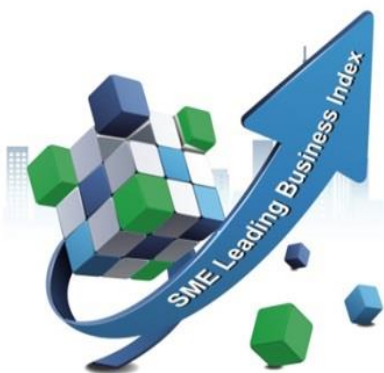
員工福利  
Staff Benefits

2nd

員工培訓及發展  
Training &  
Development

3rd

員工活動  
Staff Activities



# 中小企對培育及挽留人才的部署

## SMEs' Staff Training and Retaining Plan

中小企所採用的培訓模式:  
Training Modes Adopted by SMEs:

培訓模式 Training Mode	中小企數目 Number of SMEs
公司內部知識分享 Internal Sharing of Knowledge	370
在職培訓 On-the-Job Training	271
網上學習 Online Learning	128
講課模式 Lecture Seminar	77
活動模式 Activity-based Learning	73



# 生產力局支援中小企的八大措施

## HKPC's 8 Tips for SMEs







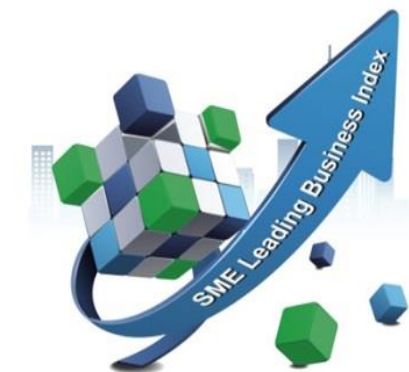
# 渣打香港中小企領先營商指數

Standard Chartered Hong Kong SME Leading Business Index

## 調查結果

Results

**專家點評**  
**Expert's Analysis**



# 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](http://www.smeone.org)**







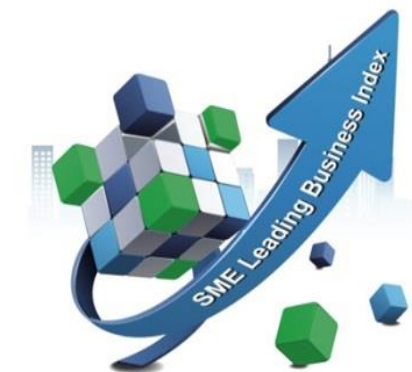
# 渣打香港中小企領先營商指數

Standard Chartered Hong Kong SME Leading Business Index

## 調查結果

Results

2019年第三季度  
2019Q3

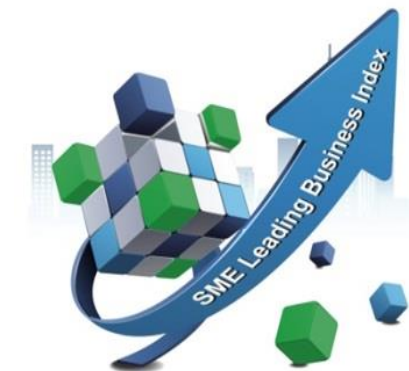




# 渣打香港中小企領先營商指數

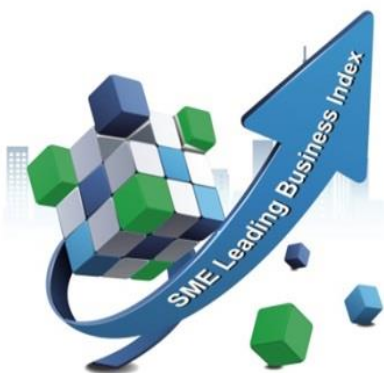
Standard Chartered Hong Kong SME Leading Business Index

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

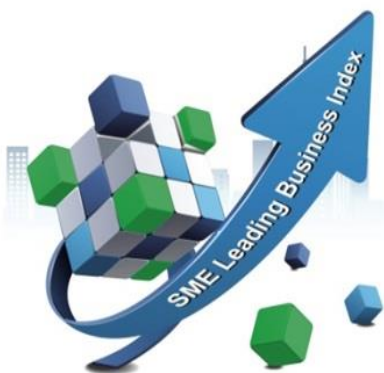
指數值為**50.0**時，表示中小企對該項營商環境因素持中立態度

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6月進行  
This survey was conducted in June 2019
- 訪問了812間本港中小企業的管理層  
Management of 812 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

## Disclaimer

- 本調查報告內容及數據均屬香港生產力促進局所有。未經本局授權不得對報告內容及數據作出任何修改或將其出售。對於本調查報告內容及數據中出現的任何錯誤、偏頗、疏漏或延誤，或據此而採取之任何行動，本局概不負上任何責任。對於因使用本調查報告內容及數據而產生的任何特殊的、附帶或相應的損失，本局概不負上任何責任。
- The content and data in this report is owned by Hong Kong Productivity Council (HKPC). Without the authorization of HKPC, any changes to the report content and data, as well as selling of the report, are not permitted. HKPC shall not have any liability, duty or obligation for or relating to the content and data contained herein, any errors, inaccuracies, omissions or delays in the content and data, or for any actions taken in reliance thereon. In no event shall HKPC be liable for any special, incidental or consequential damages, arising out of the use of the content and data.

