

# 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年第四季度


Q4 2020



# 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 recent business environment
- 探討中小企於新常態下的營商部署
- To explore SMEs' business deployments amid the new normal



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# 本季重點

## Key Points of this Quarter



37.5

第四季綜合營商指數比較上季的29.8錄得7.7增幅，並且連續兩個季度上升。  
Q4 Overall Index recorded an increase of 7.7 compared to 29.8 of Q3, and continued the uptrend for two consecutive quarters.



58%

認為持續新型冠狀病毒病疫情對營運帶來長期負面影響，但77%對疫情帶來的居家經濟及數碼化辦公等新常態持正面或中性態度。  
Expected the persistent pandemic to be a long-term negative impact on business, while 77% holding positive or neutral attitude towards the pandemic-driven new normal like home economy and digital office.

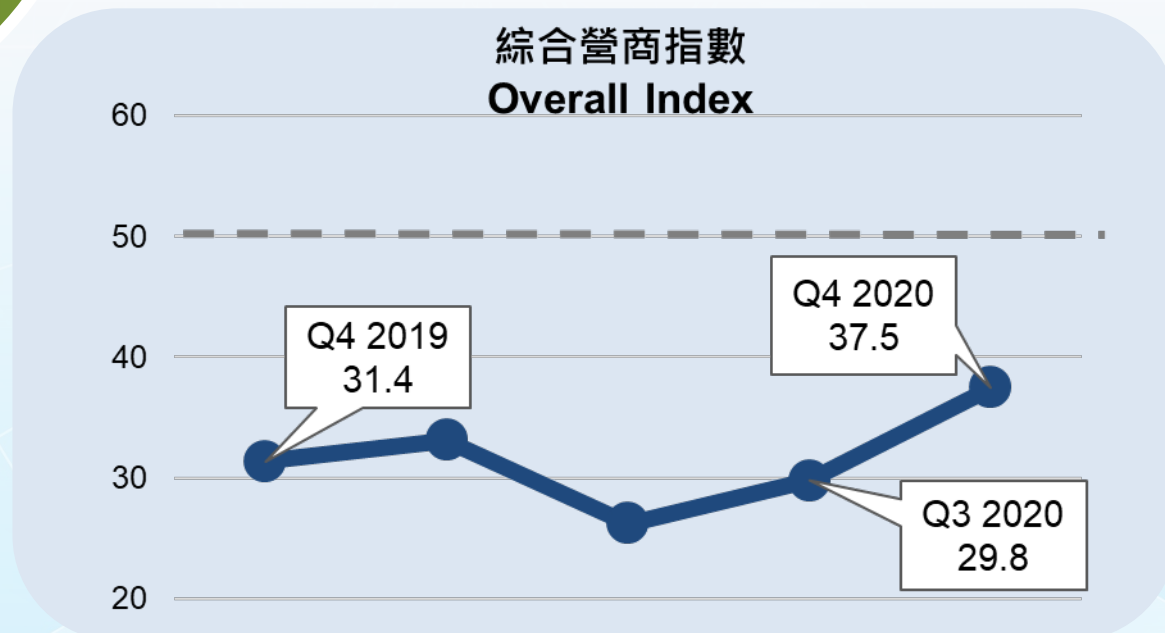
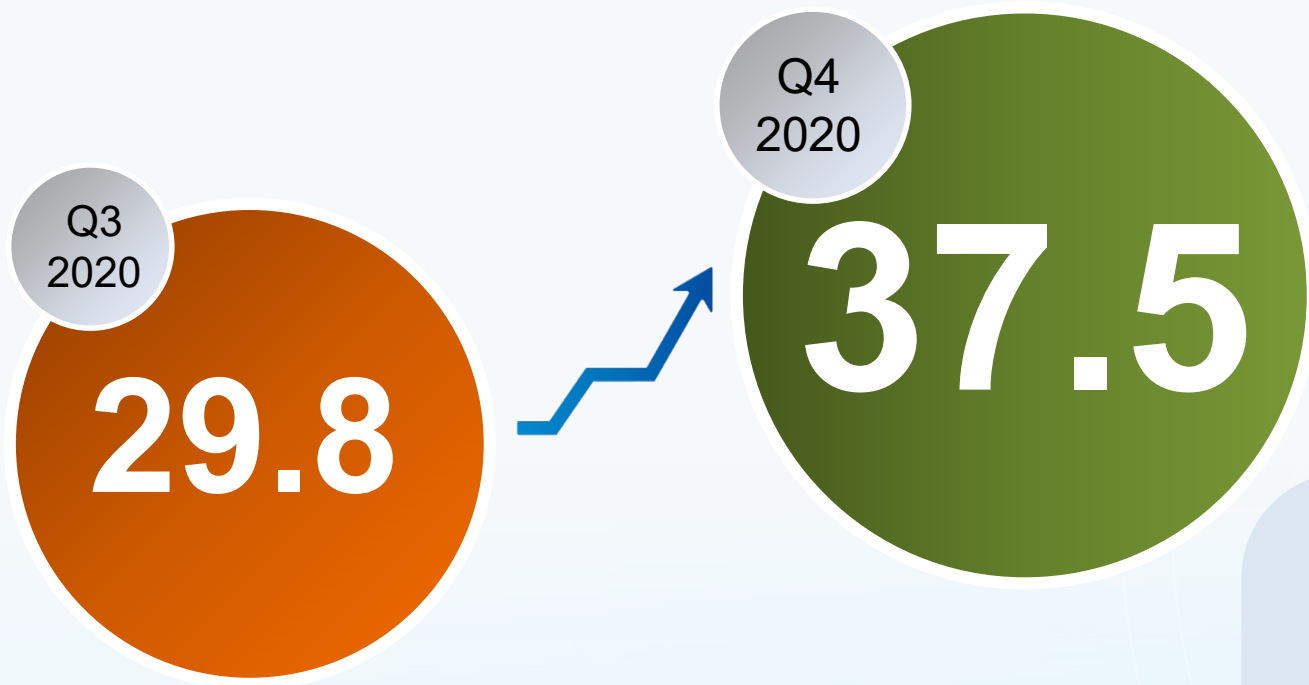


84%

已計劃 / 採取方案應對新常態。  
Have taken actions or planned to cope with the new normal.

# 2020年第四季綜合營商指數

## Overall Index in Q4 2020



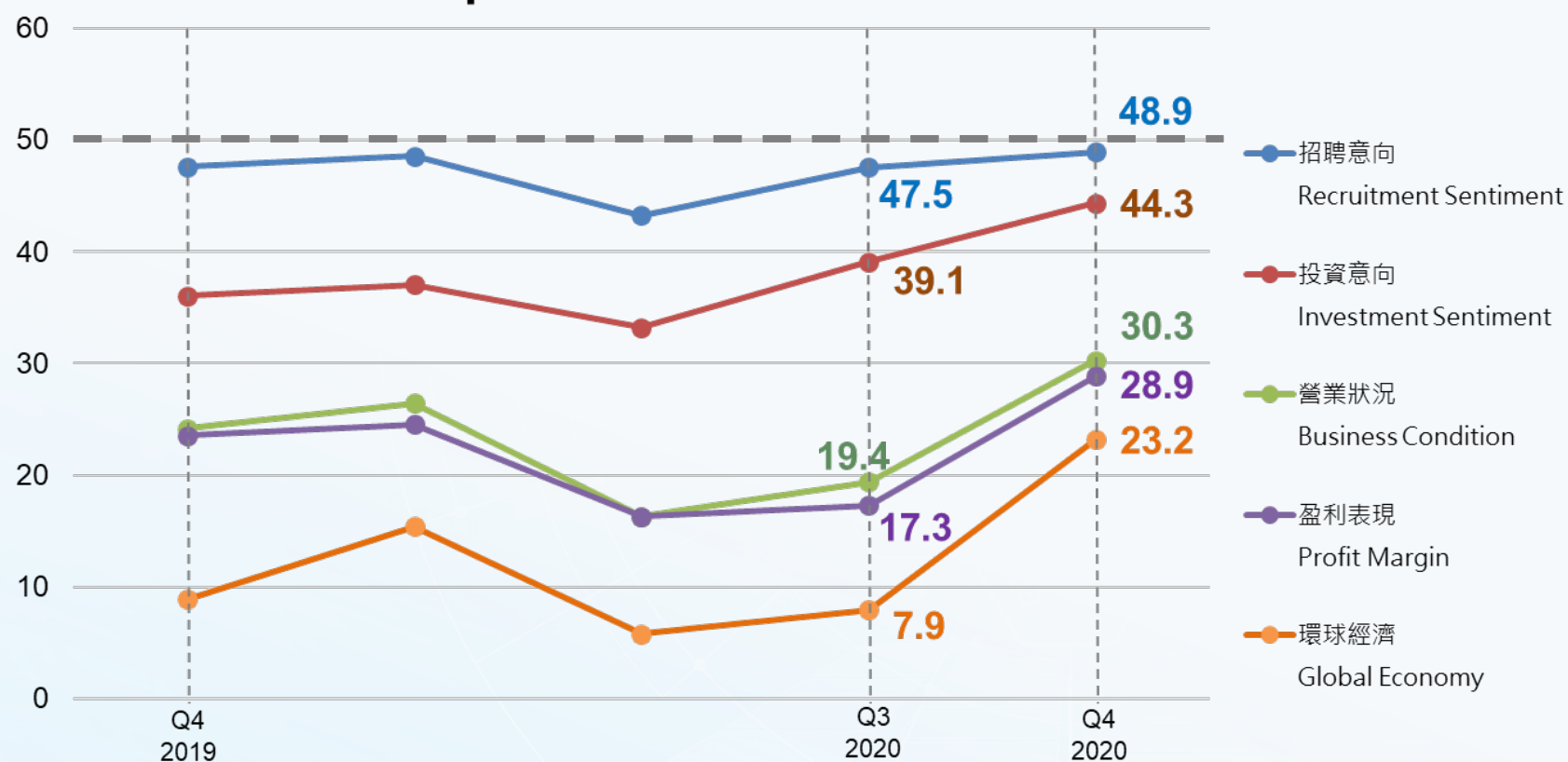
# 五大分項指數

## Five Component Sub-Indices of Overall Index

- 五大分項指數均錄得持續上升
- 「營業狀況」、「盈利表現」及「環球經濟」為帶動上升的主要因素
- All five component sub-indices continued to rise
- Major growth drivers were “Business Condition”, “Profit Margin” and “Global Economy”



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





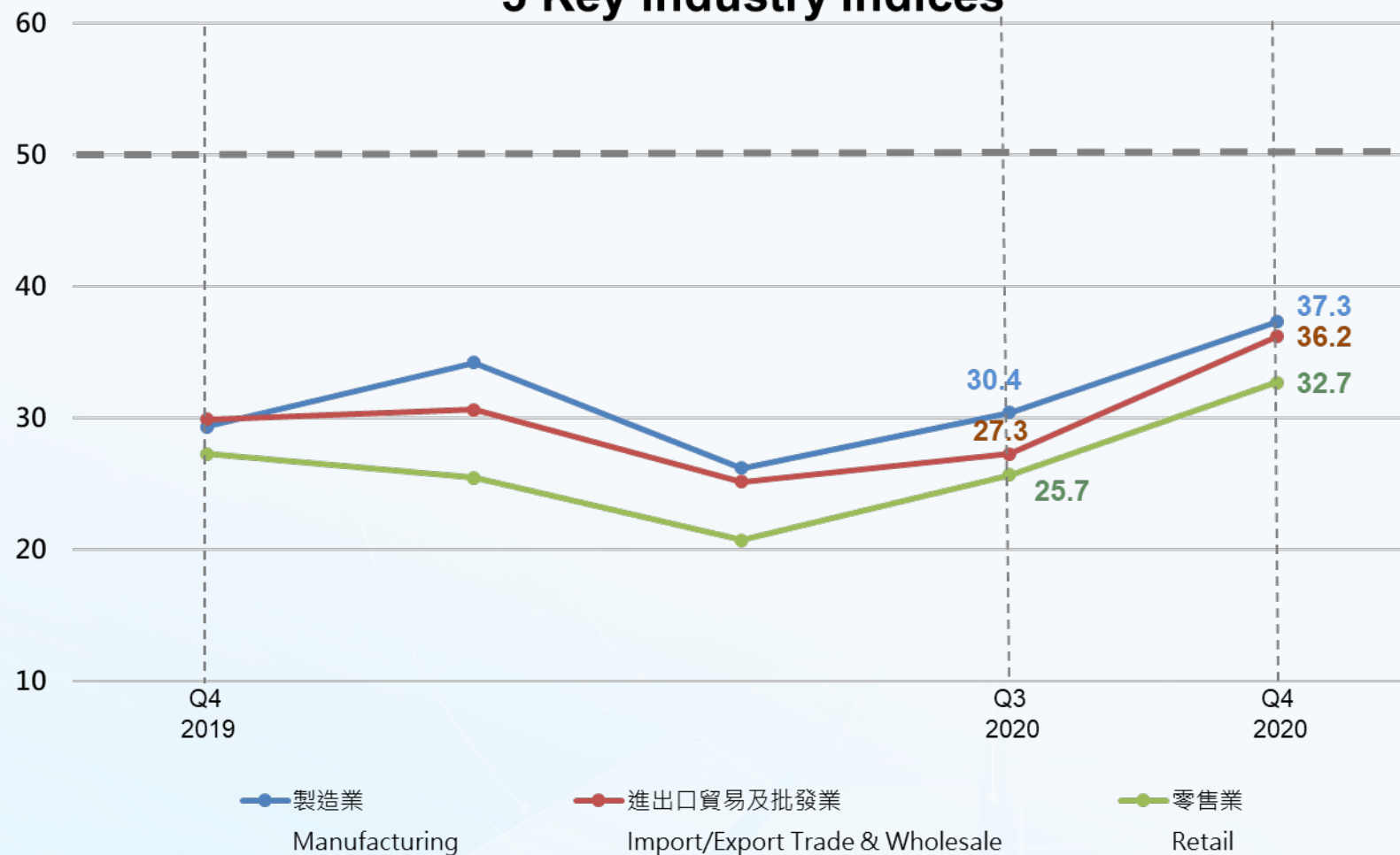
# 三大行業指數

## 3 Key Industry Indices

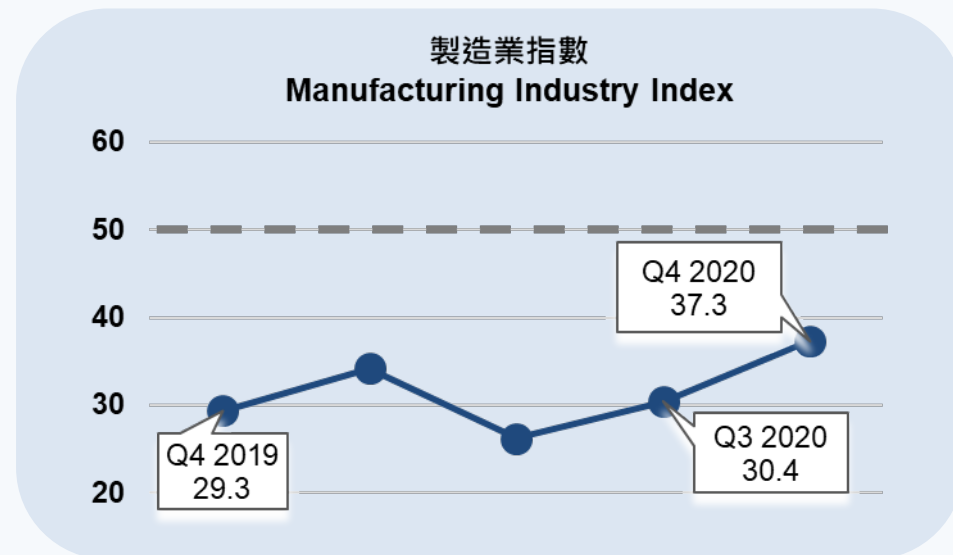
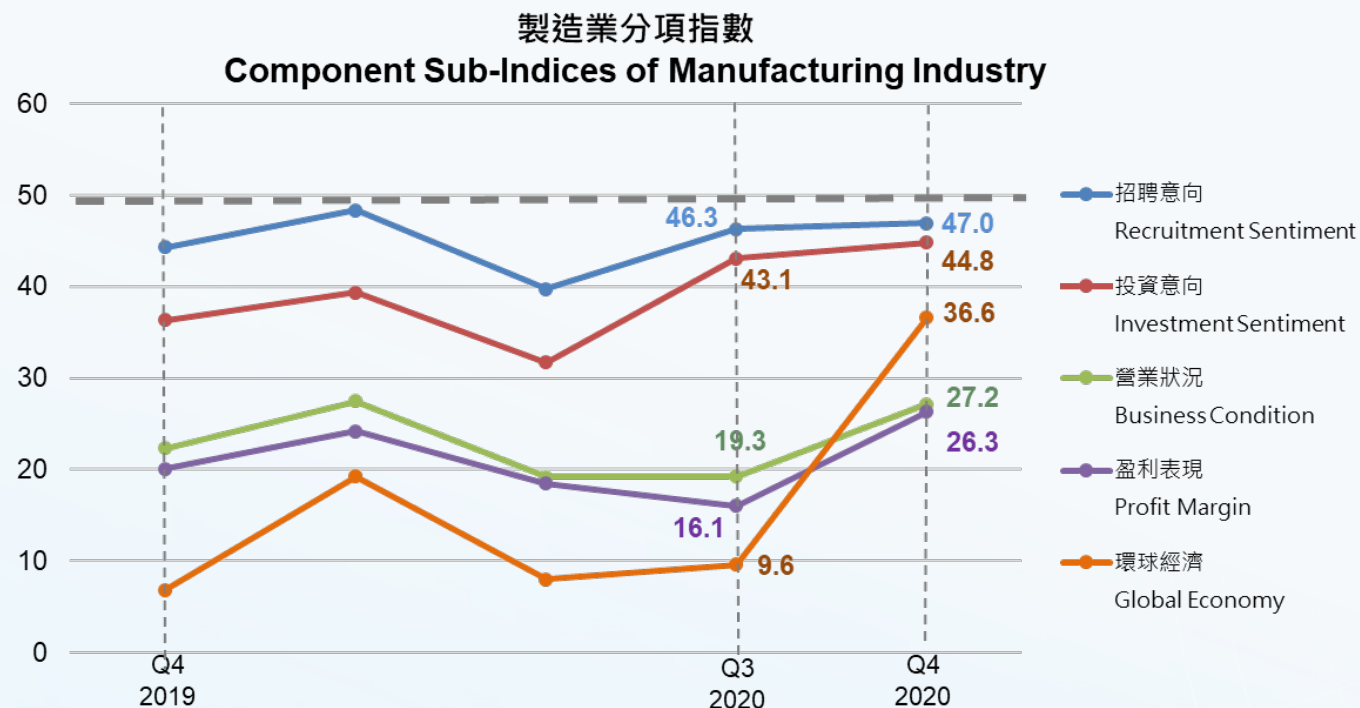
- 三大行業指數連續兩季上升
- The 3 Key Industry Indices continued the uptrend for 2 consecutive quarters



三大行業指數  
3 Key Industry Indices



# 製造業 Manufacturing

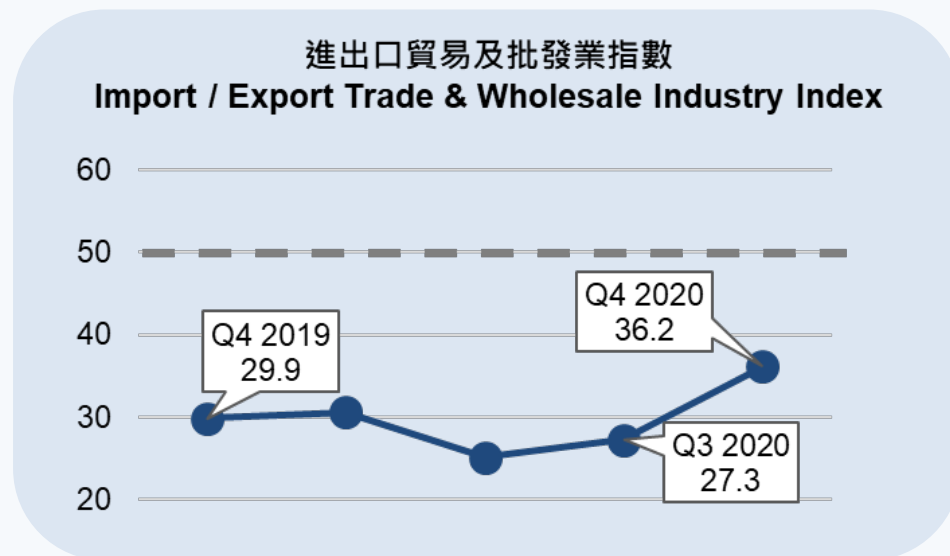
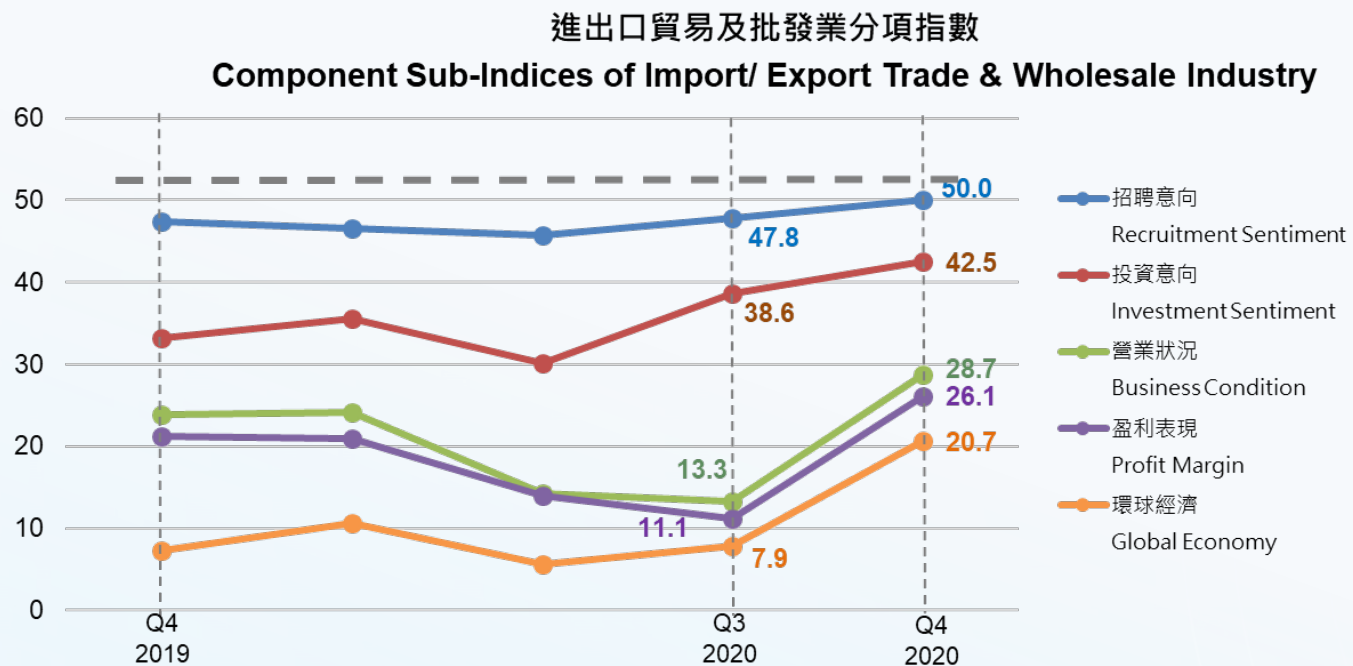


- 行業指數較上季上升 6.9 至 37.3
- 對比上季，各個分項指數均見上升，當中最明顯為「環球經濟」，上升27至36.6
- Industry index increased by 6.9 to 37.3
- As compared to Q3, all sub-indices showed uptrend especially “Global Economy” which increased by 27 to 36.6



# 進出口貿易及批發業

## Import / Export Trade & Wholesale

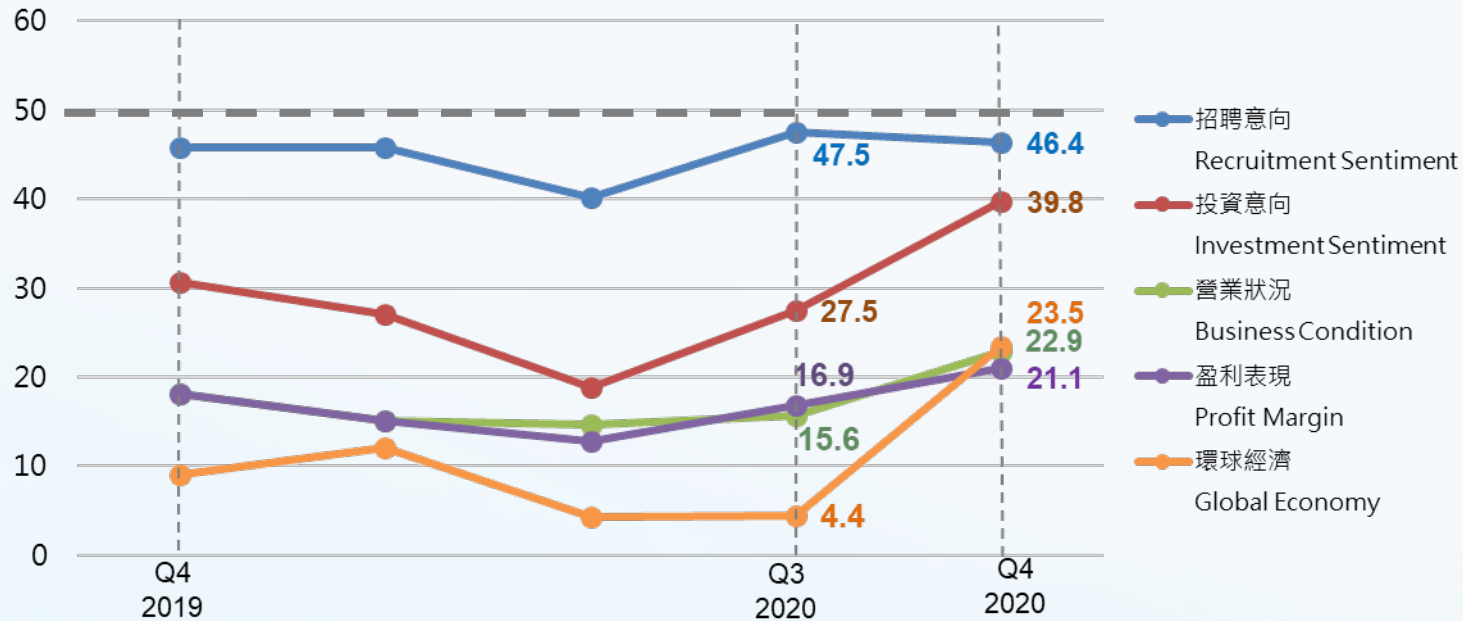


- 行業指數較上季上升 8.9 至 36.2
- 對比上季，所有分項指數均見上升，當中「招聘意向」分項指數回升至50
- Industry index increased by 8.9 to 36.2
- As compared to Q3, all component sub-indices recorded an uplift, among which “Recruitment Sentiment” sub-index went up to 50

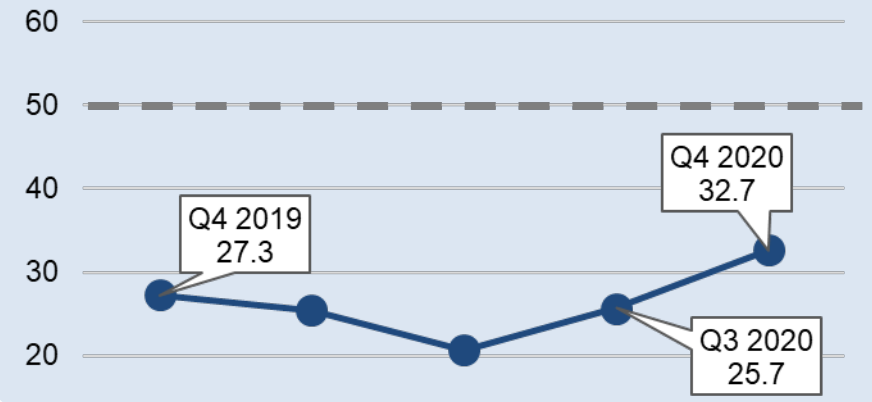
# 零售業 Retail

零售業分項指數

Component Sub-Indices of Retail Industry



零售業指數  
Retail Industry Index



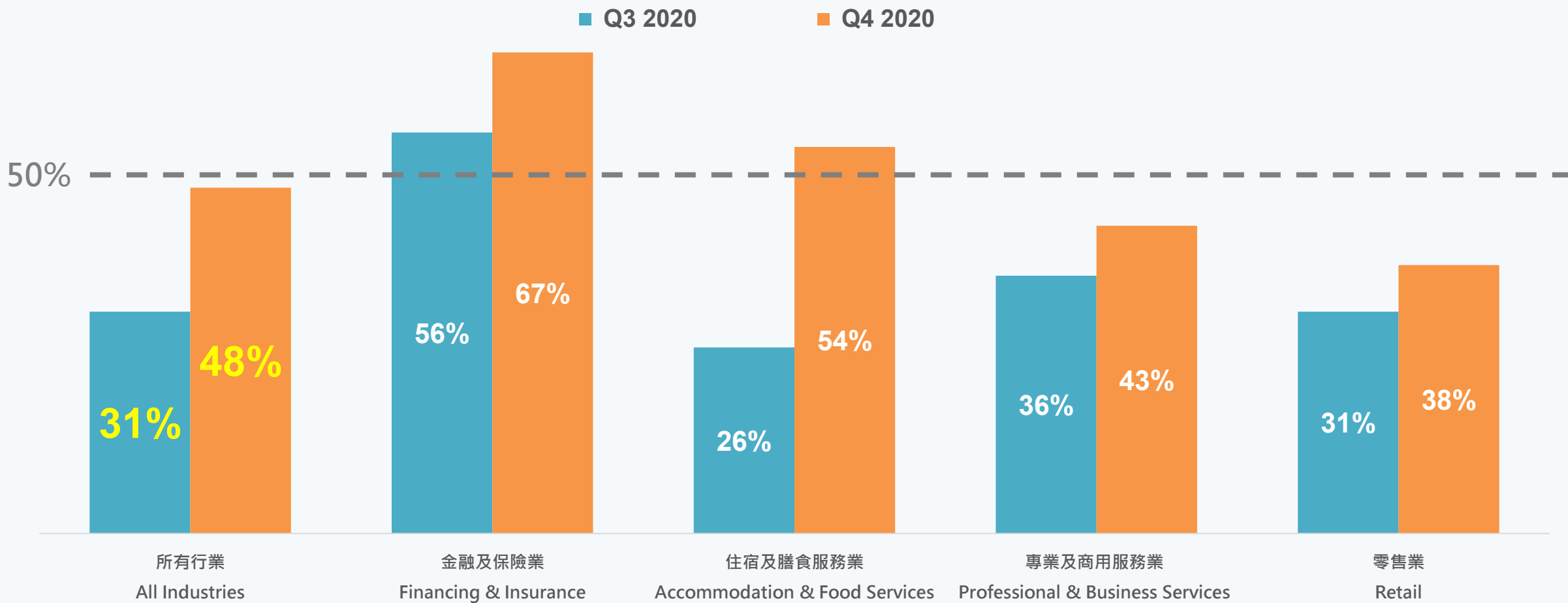
- 行業指數較上季上升 7.0 至 32.7
- 對比上季，除了「招聘意向」微跌外，所有其他分項指數均錄得上升
- Industry index increased by 7.0 to 32.7
- All component sub-indices increased except a slight drop of “Recruitment Sentiment” as compared to Q3



# 市場展望

## Market Observations

### 預期營業額會上升或維持的中小企 SMEs that are expecting an increased or unchanged turnover



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## 調查專題

Featured Topic

## 中小企於新常態下的營商部署

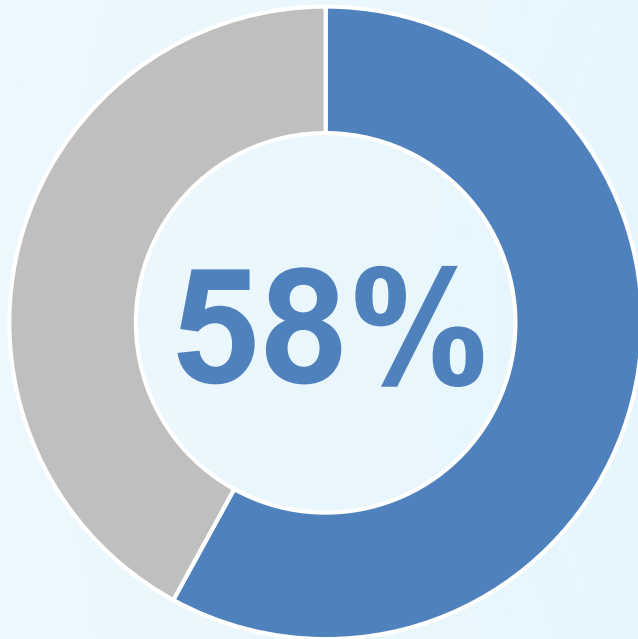
SMEs' Business Action amid the New Normal





# 中小企對新型冠狀病毒病疫情的看法

## SMEs' View towards COVID-19 Pandemic



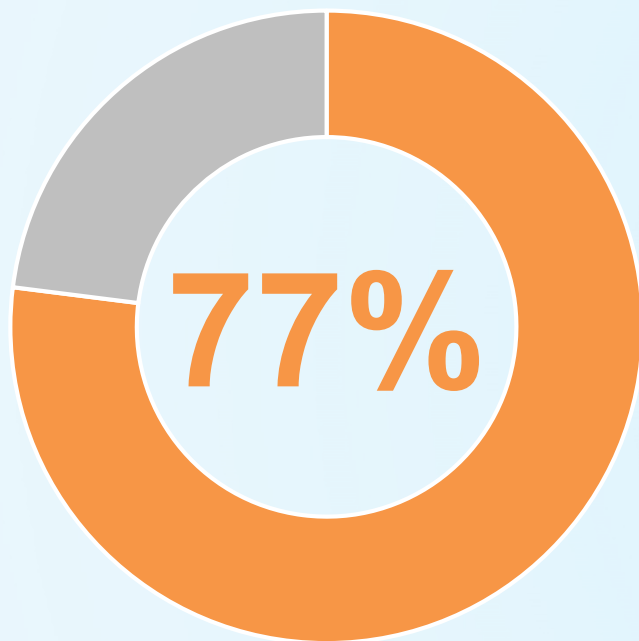
預期新型冠狀病毒病疫情持續會對營運帶來長期負面影響。

Expected the persistent COVID-19 pandemic to be a long-term negative impact on businesses.



# 中小企對疫下新常態的看法

## SMEs' View towards the Pandemic-Driven New Normal



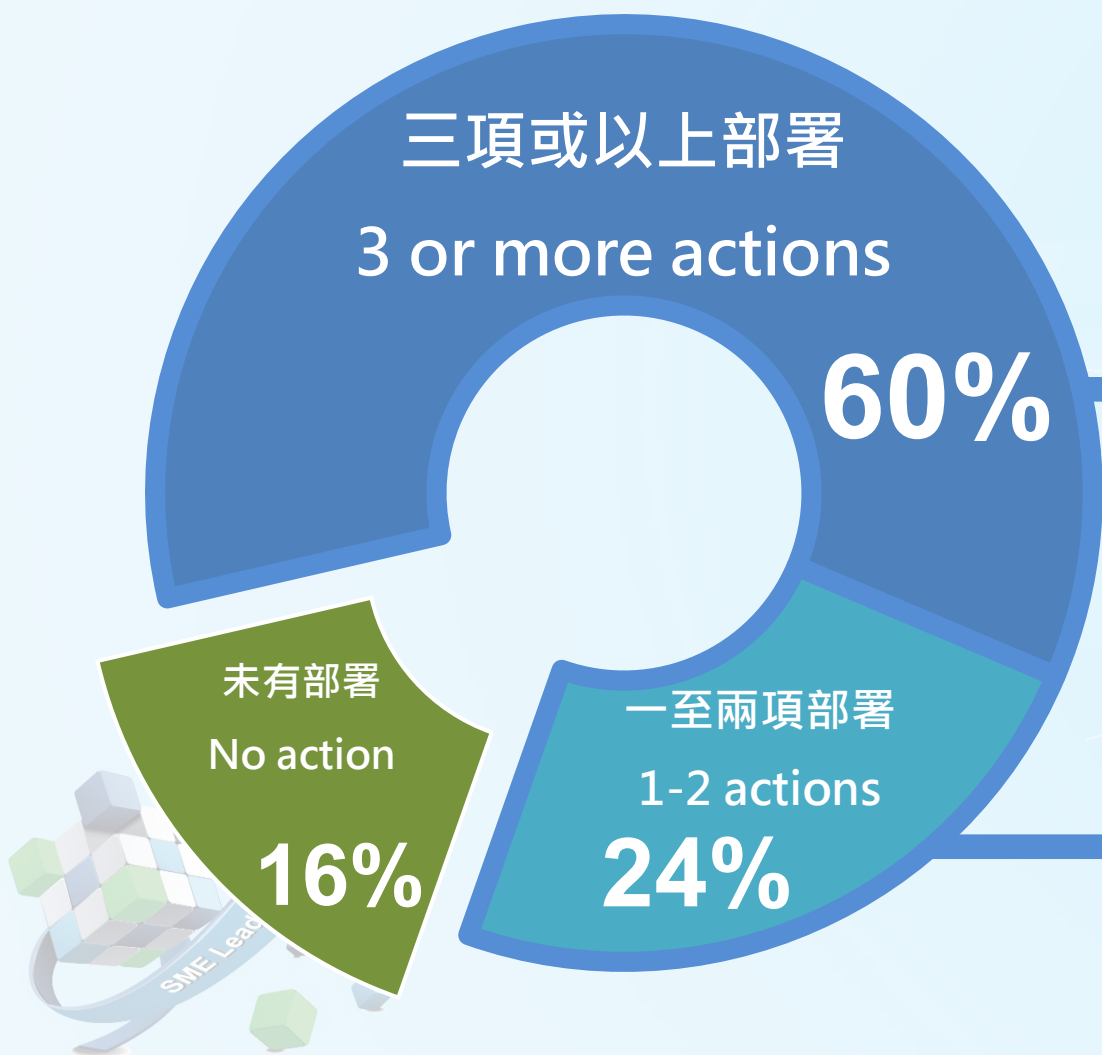
對新型冠狀病毒病疫情帶來的居家經濟及數碼化辦公等新常態持正面或中性態度。

Held positive or neutral attitude towards the new normal like home economy and digital office driven by the COVID-19 pandemic.



# 中小企就新常態的部署

## SMEs Adapting to the New Normal



**84%**

中小企已計劃 / 採取方案  
應對新常態。  
**SMEs have taken action(s)  
or planned to cope with the  
new normal.**



# 各行業的部署

## Actions by Industry Sectors

較多採取部署的行業：  
Sectors adopted relatively more actions:

1 資訊及通訊業  
Information and Communications

2 製造業  
Manufacturing

3 零售業  
Retail

較少採取部署的行業：  
Sectors adopted relatively less actions:

1 建造業  
Construction

2 專業及商用服務業  
Professional and Business Services

3 地產業  
Real Estate



# 中小企於未來半年將採取的部署

## Plans of SMEs for the Next 6 Months

為應對新常態，最多中小企採取 / 計劃的部署依次為：

The most popular actions taken or planned by SMEs, in descending order, to thrive in the new normal were:

1

開拓線上銷售  
Expand online sales

2

申請貸款 / 資助  
Apply loans /  
funding  
schemes

3

加強資訊保安 /  
網絡安全  
Strengthen  
information security  
/ cyber security

4

加快公司系統 /  
流程數碼化  
Speed up digitalisation  
of company system  
and processes



# 首三個在應對新常態最需要支援的行業

## Top 3 Industry Sectors Requiring Support amid the New Normal

1

零售業  
Retail

2

建造業  
Construction

3

專業及商用服務業  
Professional and  
Business Services



# 中小企需要的支援

## Support Needed by SMEs

中小企最需要得到的幫助：  
Areas of support most wanted by SMEs:

1

資金  
Funding

2

人才和專業技術  
Talents &  
professional skills

3

系統、硬件和配套  
System, hardware  
& facilities



# 生產力局措施 支援中小企走出困局

## HKPC's Measures Help SMEs Tide over Rough Seas

4

### 大支援 Pillars of Support

- 智能生產  
Smart manufacturing
- 數碼轉型、技術提升  
Digital transformation, technology upgrade
- 產品測試服務  
Product testing services
- 落地科研  
R&D commercialisation

工業4.0 /  
企業4.0方案  
i4.0 / e4.0  
solutions

資助基金  
Funding  
schemes

- 中小企資援組  
SME ReachOut
- 政府資助基金執行機構服務  
(如BUD專項基金、ReTAAS)  
Implementation Organisation for  
HKSAR Government funding schemes  
(BUD Fund, ReTAAS, etc)

- 生產力學院課程  
HKPC Academy courses
- 知創空間全新品牌「TechEd」  
Inno Space new "TechEd" brand
- HKPC Live 網絡研討會  
HKPC Live webinars

人才培訓  
Talent  
training

- 香港電腦保安事故協調中心  
Hong Kong Computer Emergency Response Team  
Coordination Centre (HKCERT)

- 網絡保安「貼士」及專題調查  
Cyber security tips & surveys
- 培訓及顧問服務  
training & consultation services

網絡保安  
Cyber  
security







### Foresight 智 ◀▶▶ 2021 瞻

掌握先機 扭轉困局

Stay ahead with visionary insight

23 – 27 November 2020

揭幕論壇  
Unveiling  
forum

中小企如何以技術轉型  
迎接新經濟

How SMEs Rise up to New Economy  
through Technology Transformation



### 專家薈萃，聚焦討論 Heavyweights to discuss

- 技術及新經濟發展的未來大趨勢  
Future development trend of technology & new economy
- 數碼商貿 – 東盟市場篇及大灣區篇  
Digital trade & businesses – ASEAN & GBA
- 可持續性與綠色科技  
Sustainable green technologies
- 東盟市場機遇與挑戰  
Opportunities & challenges of ASEAN markets
  - 未來領袖才能  
Future leadership
  - 再工業化  
Re-industrialisation
  - 5G與物聯網  
5G & IoT

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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>





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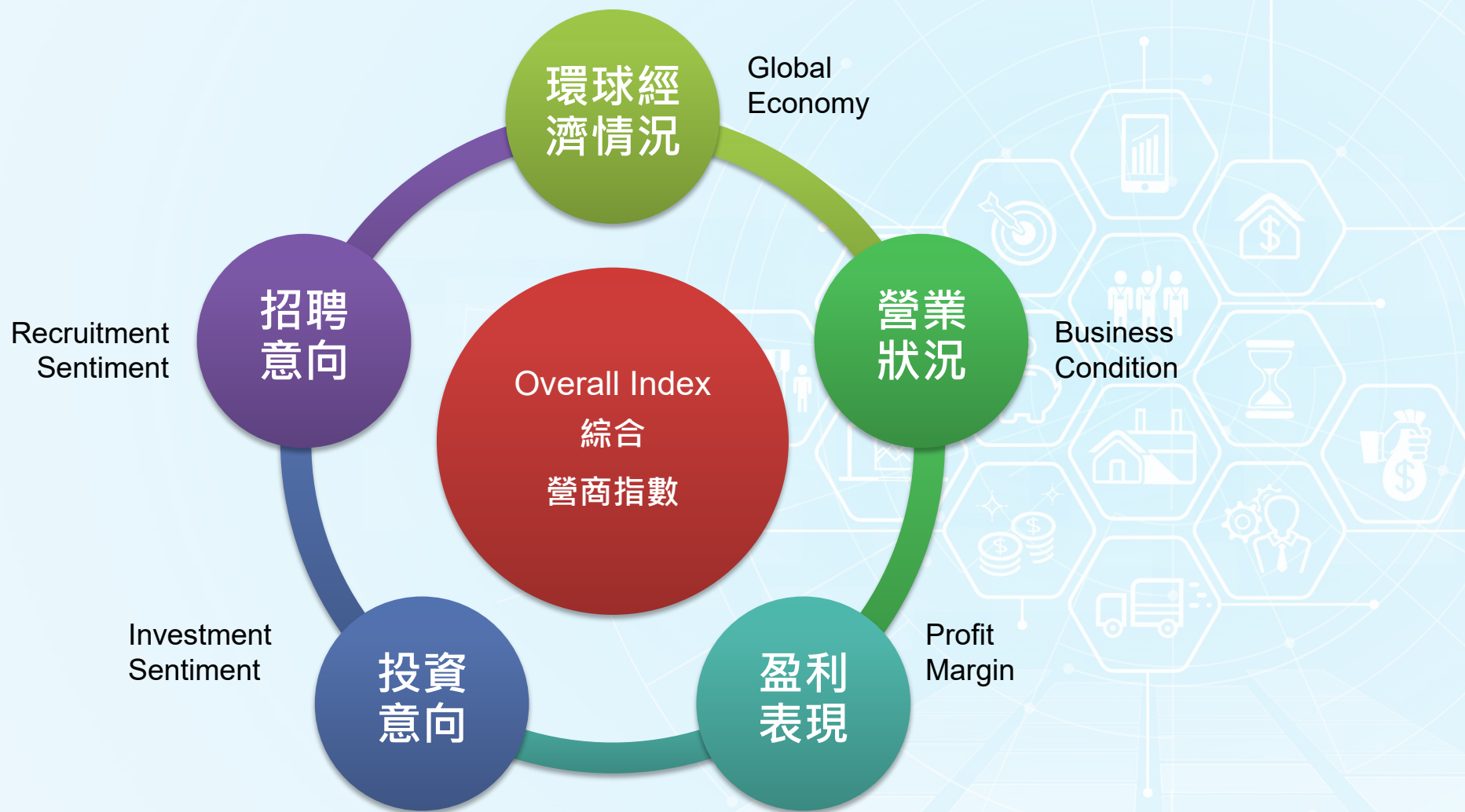
## 調查背景

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 9 月進行  
This survey was conducted in September 2020
- 訪問了 816 間本港中小企業的管理層  
Management of 816 SMEs were interviewed

### 涵蓋行業

- 1 ) 製造業  
Manufacturing
- 2 ) 進出口貿易及批發業  
Import / Export Trade and Wholesale
- 3 ) 零售業  
Retail
- 4 ) 住宿及膳食服務業  
Accommodation and Food Services
- 5 ) 資訊及通訊業  
Information and Communications
- 6 ) 金融及保險業  
Financing and Insurance
- 7 ) 專業及商用服務業  
Professional and Business Services
- 8 ) 地產業  
Real Estate



# 免責聲明

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