

# 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

2022年第一季度

Q1 2022



# 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
- 探討中小企對「環境、社會及管治」的看法及部署
- To look into SMEs' perspective and planning on ESG

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2022年第一季度  
Q1 2022



# 本季重點

## Key Points of this Quarter



48.1

第一季綜合營商指數，較上季微跌0.1

Q1 Overall Index, marginally dropped 0.1 from last quarter



94%

受訪中小企不認識或對ESG理解不足

surveyed SMEs do not know or with insufficient knowledge about ESG



31%

受訪中小企認為ESG有助於提升公司 / 品牌形象

surveyed SMEs believe ESG can enhance company/ brand image



# 2022年第一季綜合營商指數

## Overall Index in Q1 2022

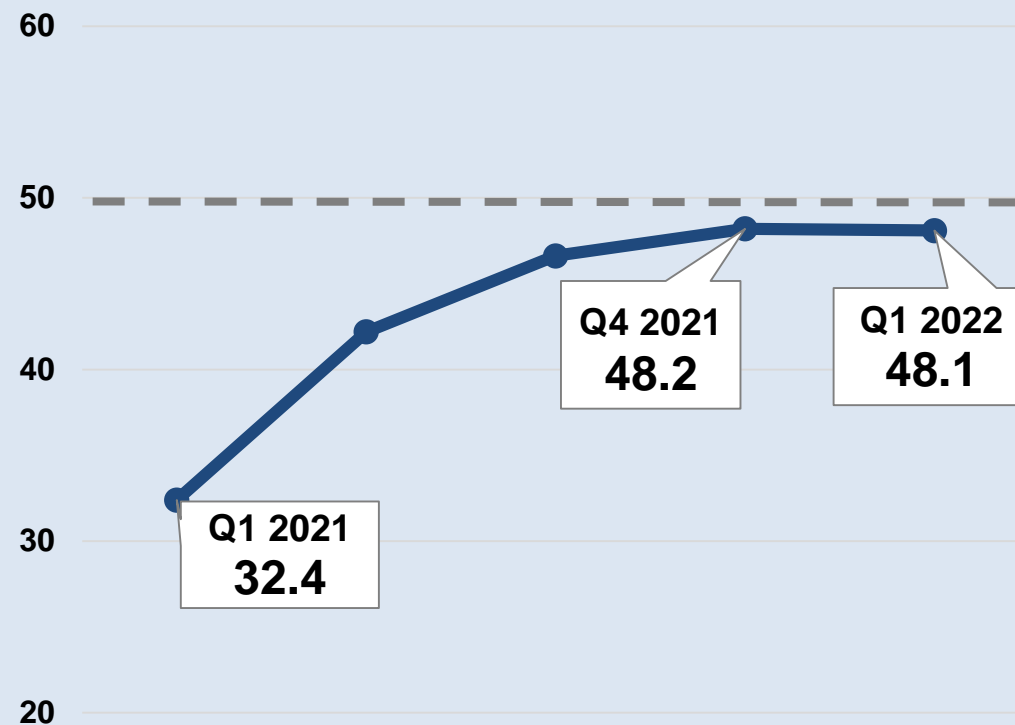
48.1

按季微跌  
Quarter-over-quarter  
decrease

-0.1



綜合營商指數  
Overall Index

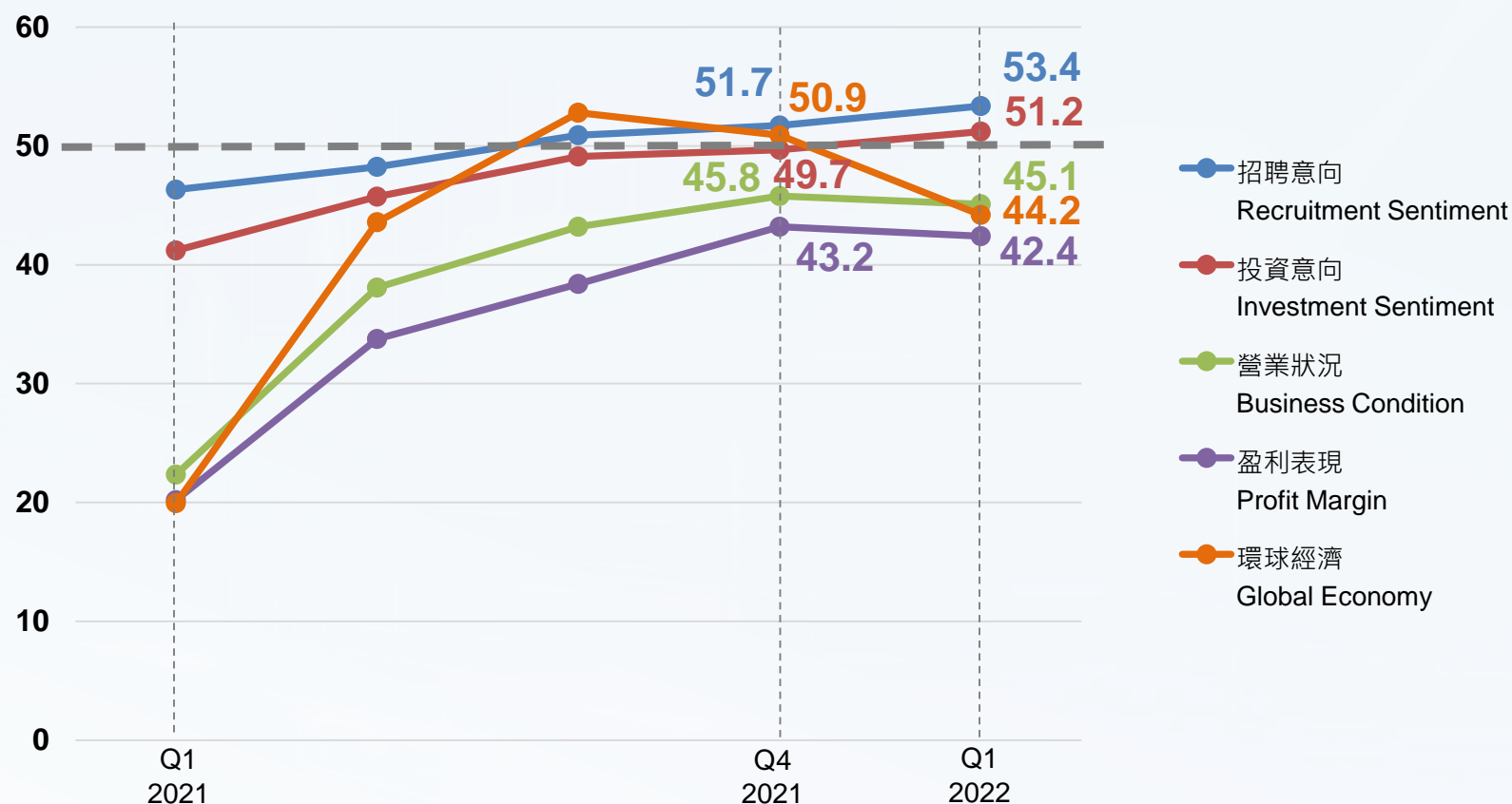


# 五大分項指數

## Five Component Sub-Indices of Overall Index

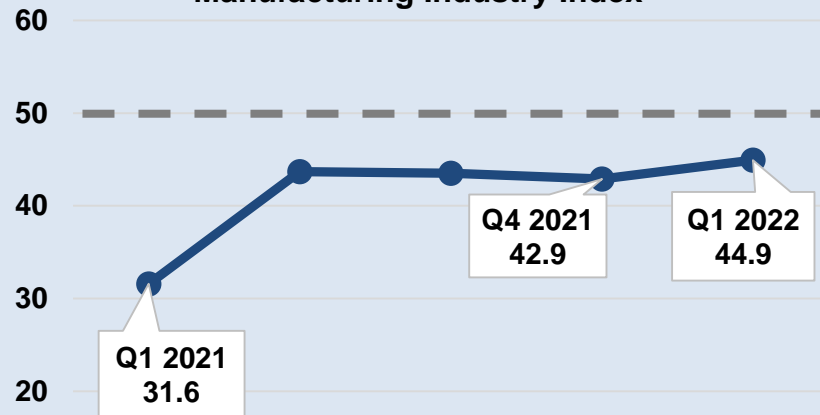
- 「招聘意向」及「投資意向」持續上升，錄得50中性水平以上
- 「環球經濟」錄得最明顯跌幅，較上季下跌6.7至44.2
- “Recruitment Sentiment” and “Investment Sentiment” continued the uptrend, recorded above 50 neutral level
- “Global Economy” recorded the most significant drop, down 6.7 to 44.2

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

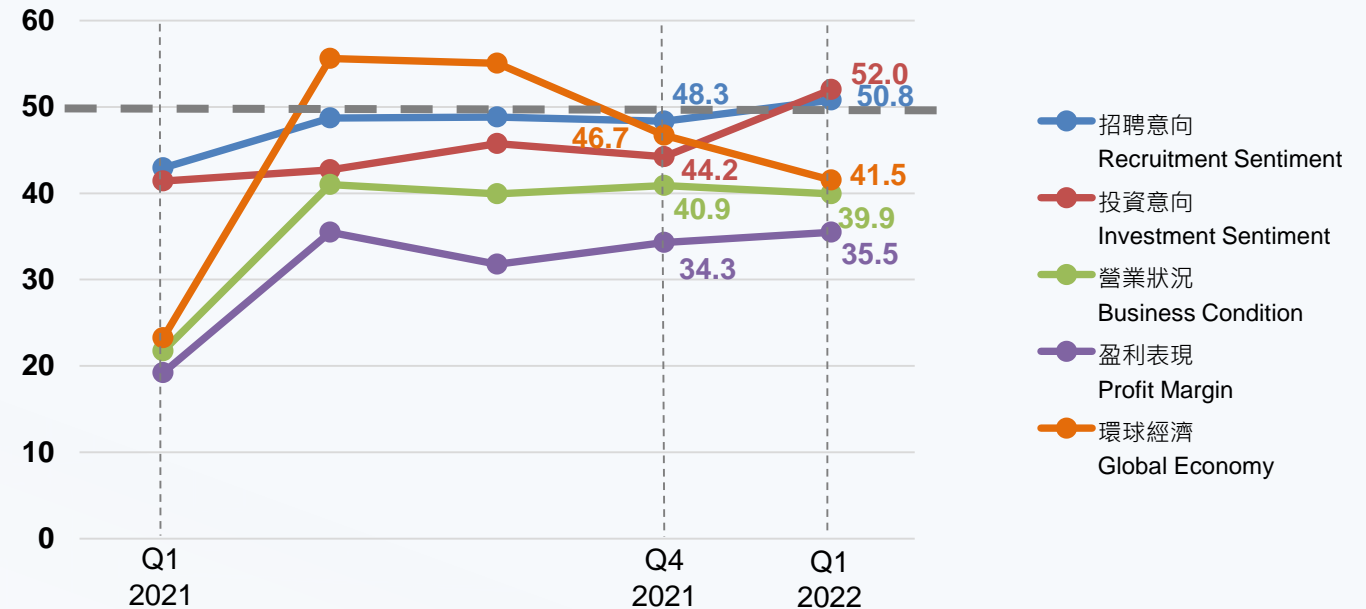


# 製造業 Manufacturing

製造業指數  
Manufacturing Industry Index



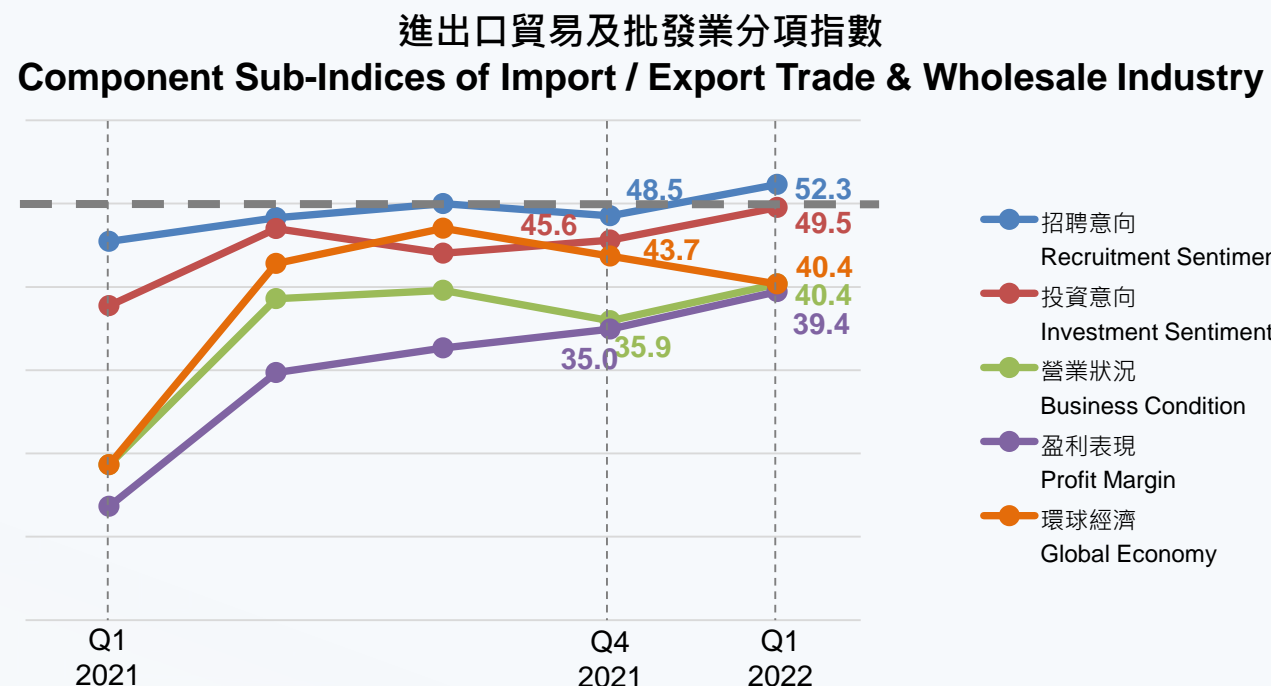
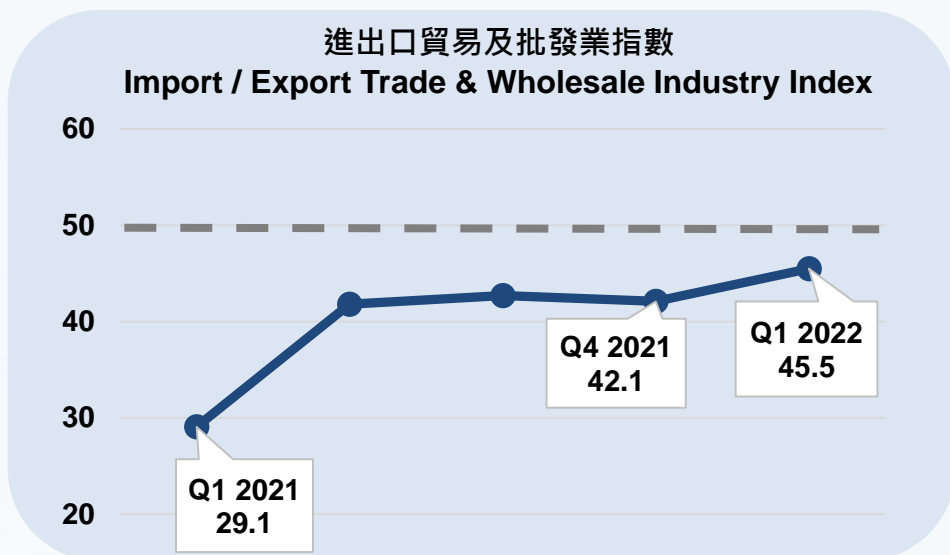
製造業分項指數  
Component Sub-Indices of Manufacturing Industry



- 行業指數趨於持平，較上季微升 2.0 至 44.9
- 分項指數中的「環球經濟」連續兩季下跌至 41.5
- Industry index remained flat with slight increase by 2.0 to 44.9 compared to last quarter
- “Global Economy” component sub-index showed a downturn for two consecutive quarters, decreased to 41.5

# 進出口貿易及批發業

## Import / Export Trade & Wholesale

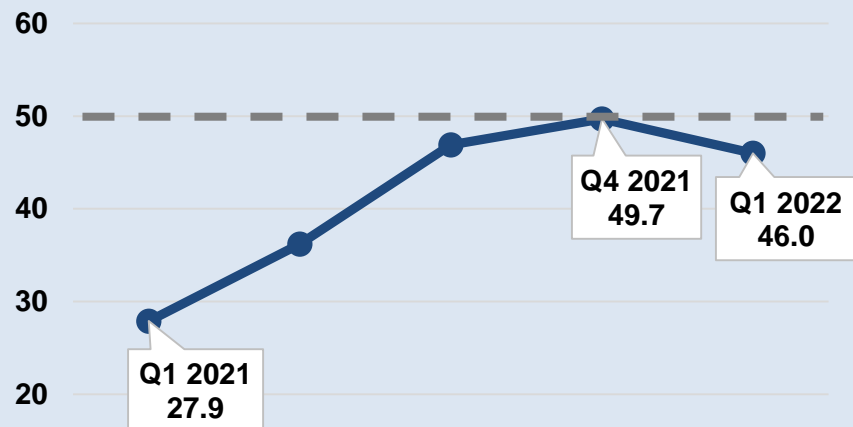


- 行業指數較上季上升 3.4 至 45.5
- 多項分項指數錄得升幅，惟「環球經濟」下跌3.3 至40.4
- Industry index jumped by 3.4 to 45.5 compared to last quarter
- Most component sub-indices showed an upturn, except “Global Economy” which presented a drop of 3.3 to 40.4

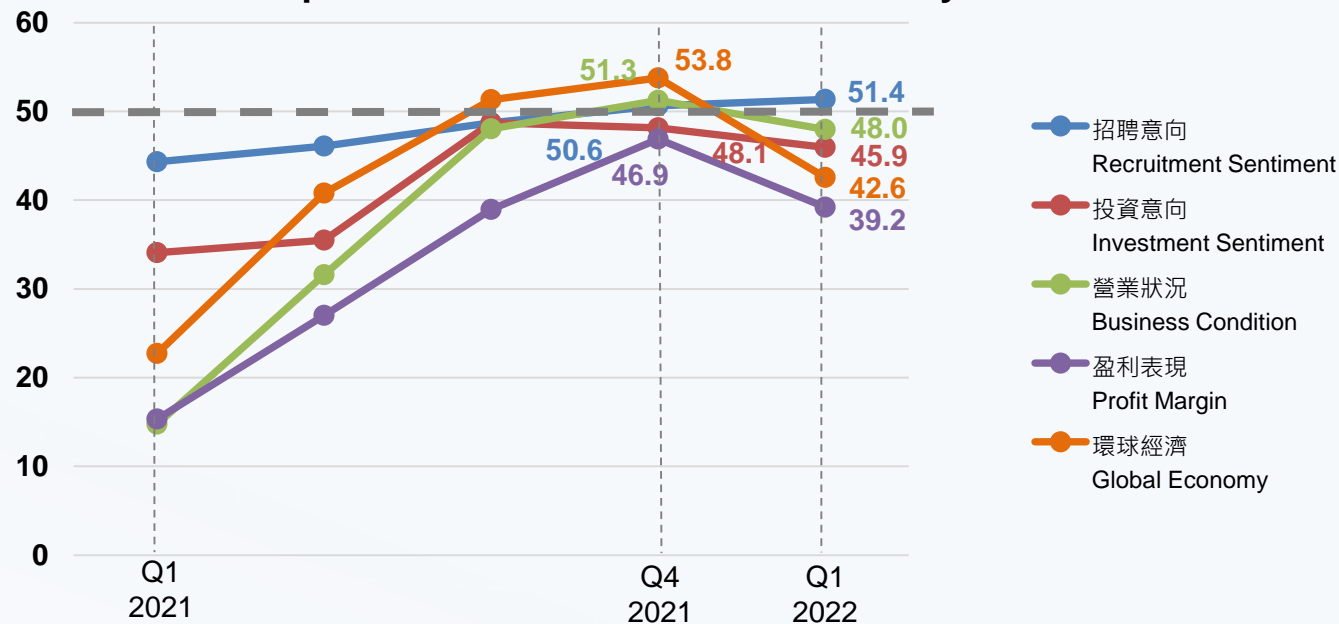


# 零售業 Retail

零售業指數  
Retail Industry Index



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



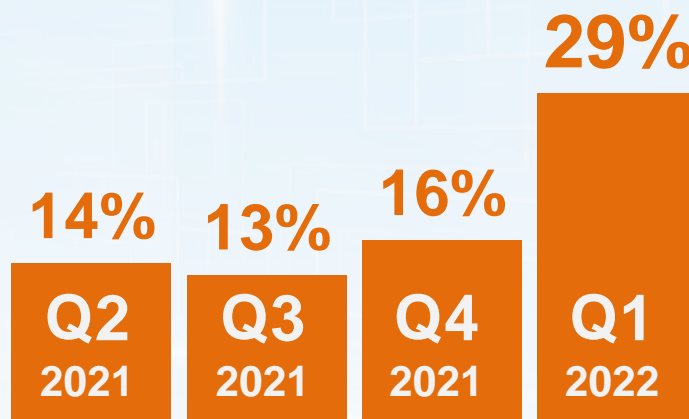
- 行業指數較上季下跌 3.7 至 46.0
- 多項分項指數錄得跌幅，惟「招聘意向」微升0.8 至51.4
- Industry index decreased by 3.7 to 46.0
- Most component sub-indices showed a drop, except “Recruitment Sentiment” which recorded a marginal climb of 0.8 to 51.4

# 成本、員工薪金及價格上升的預期

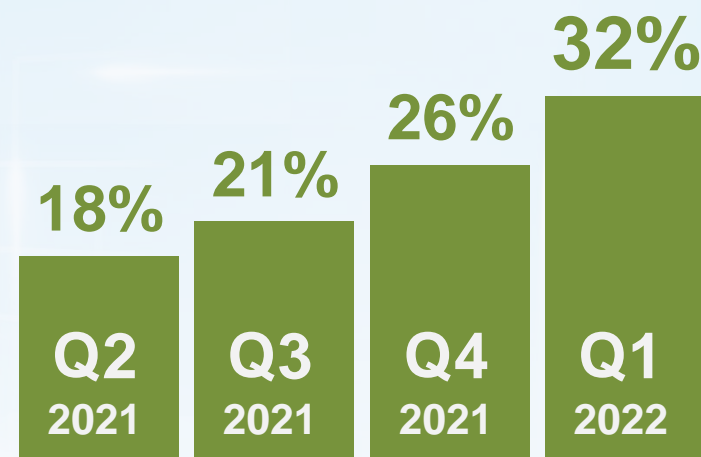
## Expectation towards Increase on Cost, Staff Salary and Price Factors



原材料成本上升  
Raw Materials Cost Increase



員工薪金上升  
Staff Salary Increase



貨品 / 服務價格上升  
Product / Service Price Increase

# 電子商務佔總營業額的預期

## Expectation towards Proportion of Turnover on E-commerce

9%

近一成中小企  
預期來季電子商務佔總營業額  
的比例會上升

Nearly 10% of SMEs expected  
the proportion of e-commerce  
in total turnover will increase  
in the next quarter

來季電子商務佔總營業額的比例會上升的行業  
Industries that expected the proportion of turnover  
on e-commerce to be increased in next quarter

22%

住宿及膳食服務業  
Accommodation and Food Services

15%

製造業  
Manufacturing

14%

資訊及通訊業  
Information and Communications

14%

金融及保險業  
Financing and Insurance

# 整體投資額轉變的預期

## Expectation towards Changes on Overall Investment

11%

逾一成中小企  
預期整體投資額上升

Over 10% of SMEs  
expected an increase on  
overall investment

近四分一的中小企預期會增加投資額的項目

Near one-quarter of SMEs will increase  
investment in the following items

24%

線上市場推廣  
Online Marketing Promotion

24%

機器及設備  
Facility and Equipment

23%

研究及開發項目  
R&D

22%

庫存  
Inventory

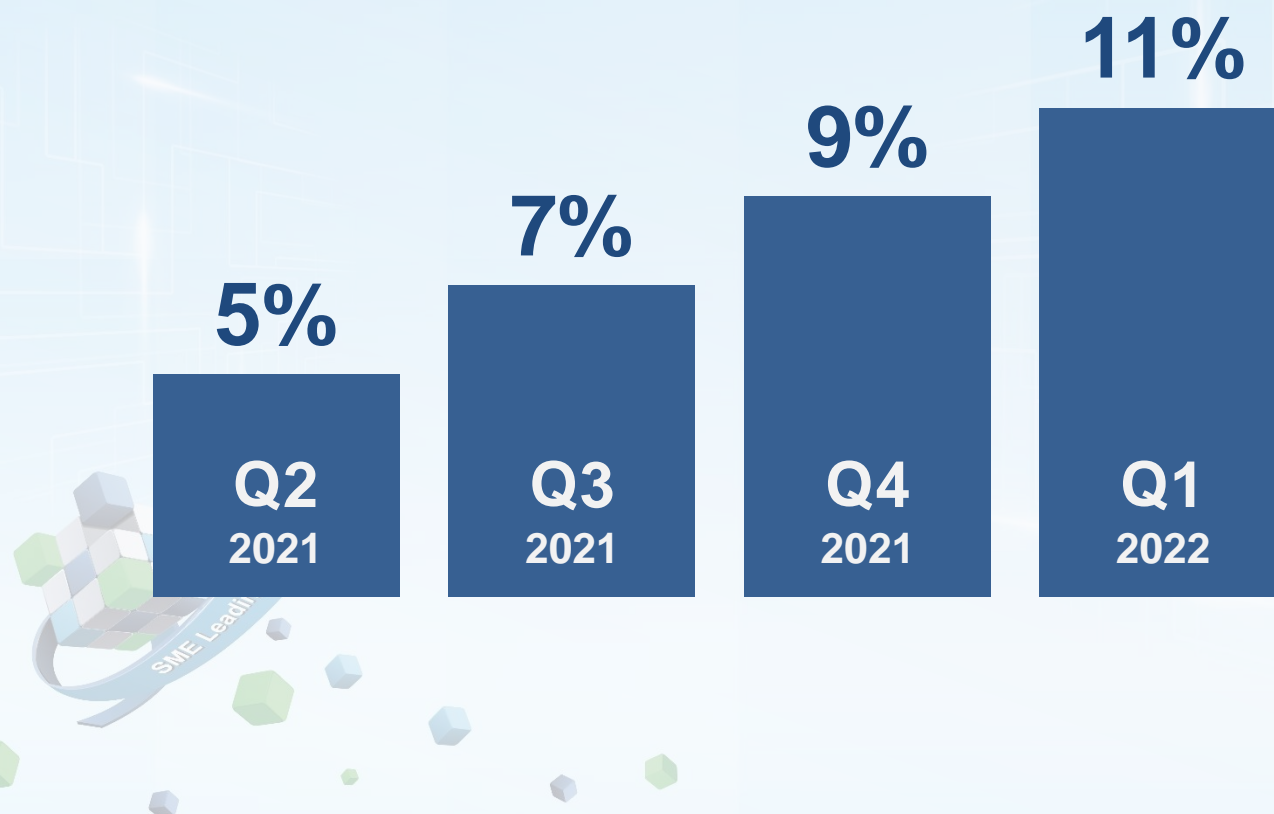


# 員工數量轉變的預期

## Expectation towards Changes on Number of Staff

中小企預期總員工人數會持續上升

SMEs expected the total number of staff continue to grow



上升幅度最大的行業

Industries with the biggest increase

1

住宿及膳食服務業

Accommodation and Food Services

2

資訊及通訊業

Information and Communications

3

社會及個人服務業

Social and Personal Services



# 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

香港中小企對「環境、社會及管治」的看法及部署  
Hong Kong SMEs' Perspective and Planning on ESG



# 中小企對ESG的看法

## SMEs' Perspective on ESG

94%

不認識或  
對ESG理解不足  
Not aware of or with  
insufficient knowledge  
about ESG

6%

認識及  
正確理解ESG為  
Aware of and  
correctly defined ESG as



公司管治  
Corporate  
Governance



社會責任  
Social  
Responsibility

關愛員工  
Staff Caring

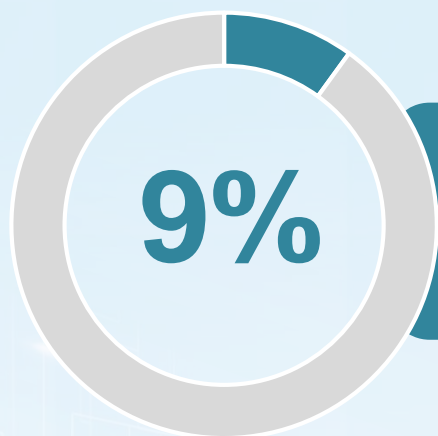


保護環境  
Environment  
Protection

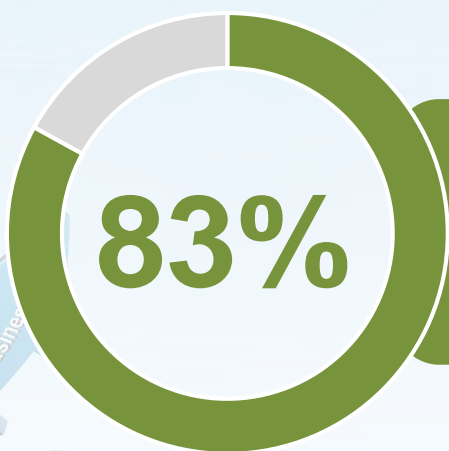


# 中小企對ESG的看法

## SMEs' Perspective on ESG



只有9%的中小企現正推行ESG  
Only 9% of SMEs have put ESG into practice



超過八成中小企未有因要推行ESG而感到壓力  
Over 80% of SMEs do not have the urge to implement ESG



# 中小企對ESG的看法

## SMEs' Perspective on ESG

認為推行ESG最有可能帶來的好處  
Benefits from implementing ESG

31%

提升公司 / 品牌形象  
Enhance Company/  
Brand Image

19%

符合政府 / 監管要求  
Comply with Government/  
Regulation Requirement

17%

滿足客戶的期望  
Meet with Client Expectation



# 中小企推行ESG的挑戰

## SMEs' Challenges on Implementation of ESG

64%

中小企目前沒有足夠  
人手或資金推行ESG

SMEs do not have  
enough manpower or  
capital to implement ESG  
now

中小企最期望得到的支援  
Supports most wanted by SMEs



資金  
Funding



行業指引  
Industry Guidance



人力資源培訓  
Human Resource Training





公司管治  
Corporate Governance



關愛員工  
Staff Caring



社會責任  
Social Responsibility



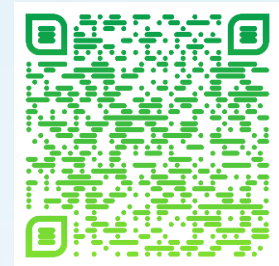
保護環境  
Environment Protection

ESG數據/報告  
ESG Data & Reporting

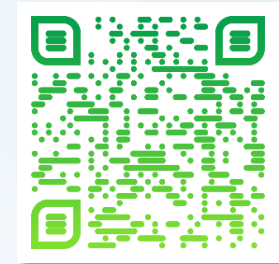
可持續發展策略與目標設定  
Sustainability Planning &  
Target Setting

提升ESG表現與能力  
Growth of ESG Performance  
& Competence

+ 改善方案  
+ Improvement Solutions



了解服務詳情  
Service Details



免費網上ESG /  
可持續發展評估  
Free Online  
Assessment



# 生產力局 Green Hall 綠色科技展館

## HKPC's Green Hall to Showcase Green Technology



即將開幕  
COMING SOON

Feb 2022

@ 生產力大樓 HKPC Building

- 展示本地創新綠色科技方案及應用  
Latest Local GreenTech Solutions
- 讓企業及公眾了解綠色科技潛能  
Explore Potential of GreenTech
- 推動業界廣泛應用  
Promote GreenTech Adoption
- 交流綠色科技趨勢  
Exchange Hub for Industry

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## 專家點評

Expert's Analysis





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Q1 2022



# 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” Reports are available on 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 2021 年 12 月進行  
This survey was conducted in December 2021
- 訪問了 817 間本港中小企業的管理層  
Management of 817 SMEs were interviewed

### 涵蓋行業

- 製造業 Manufacturing
- 建造業 Construction
- 進出口貿易及批發業 Import / Export Trade and Wholesale
- 零售業 Retail
- 運輸、倉庫及速遞服務業 Transportation, Storage and Courier Services
- 住宿及膳食服務業 Accommodation and Food Services
- 資訊及通訊業 Information and Communications
- 金融及保險業 Financing and Insurance
- 專業及商用服務業 Professional and Business Services
- 地產業 Real Estate
- 社會及個人服務業 Social and Personal Services

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