業務展望
按季統計調查報告

Report on
Quarterly Business Tendency Survey

2020年第3季
3rd Quarter 2020

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報告之註釋

(1) 為求簡便，本報告書使用以下的略語：

Q1 指第 1 季 **Q3** 指第 3 季

Q2 指第 2 季 **Q4** 指第 4 季

(2) 因應個別行業的作業模式，同一項目採用以下不同的名稱來表示：

項目	行業	名稱
業務／產出量（表 2）	製造	生產量
	建造	建造工程完成量
	進出口貿易及批發、以及零售	銷售量
	其他行業	業務量
貨品售價／服務收費（表 4）	製造、進出口貿易及批發、以及零售	貨品售價
	建造	投標價格
	膳食服務	所提供食品的價格
	保險	保費率
	地產	所出售樓宇價格／管理費用／佣金率
	其他行業	所提供服務的收費

(3) 搜集季度間變動意見時，如有關項目受季節性影響，受訪者會提供撇除正常季節性變動後的預期變動。

(4) 統計調查結果一般以「淨差額」表示，即填報「上升」的機構單位百分比減去填報「下降」的機構單位百分比。填報不同回應組別（如「上升」、「不變」及「下降」）的機構單位的百分比分布反映他們對業務展望的差異程度。「淨差額」的正負符號反映該項目的預期變動的方向。正數反映有關項目有可能上升的趨勢，而負數則反映有可能下降的趨勢。不過，正或負數值只反映受訪者樂觀或悲觀的普遍程度，而非預期變動的幅度，因這項統計調查並沒有搜集有關該幅度的資料。

(5) 由於樣本規模有所局限，在個別行業中，涉及小數值的機構單位百分比（如小於 10%）的統計調查結果，須謹慎闡釋。

(6) 由於進位關係，統計表／圖內每個項目的三個回應組別之和可能不等於 100%。

Notes in reading the report

(1) For simplicity, the following abbreviations are used throughout this report:

Q1 denotes the 1st quarter **Q3** denotes the 3rd quarter

Q2 denotes the 2nd quarter **Q4** denotes the 4th quarter

(2) For a given variable, terms presented vary according to the operating characteristics of individual sectors as follows:

Variable	Sector	Term
Volume of business/output (Table 2)	Manufacturing	Volume of production
	Construction	Volume of construction output
	Import/export trade and wholesale, and retail	Volume of sales
	Other sectors	Volume of business
Selling price/ Service charge (Table 4)	Manufacturing, import/export trade and wholesale, and retail	Selling price
	Construction	Tender price
	Food services	Price of food provided
	Insurance	Premium rate
	Real estate	Price of properties sold/ Management fee/Commission rate
	Other sectors	Charge for services rendered

(3) In collecting views on the quarter-to-quarter changes, if the variable in question is subject to seasonal variations, respondents are asked to provide the expected changes after excluding the normal seasonal variations.

(4) Survey results are generally presented as "net balance", i.e. the difference between the percentage of establishments choosing "up" and that choosing "down". The percentage distribution of establishments among various response categories (e.g. "up", "same" and "down") reflects how varied their business expectations are. The "net balance", with its appropriate sign, indicates the direction of expected change in the variable concerned. A positive sign indicates a likely upward trend while a negative sign, indicates a likely downward trend. However, the magnitude of the "net balance" reflects only the prevalence of optimism or pessimism, but not the magnitude of expected change, since information relating to such magnitude is not collected in the survey.

(5) Owing to sample size constraint, care should be taken in interpreting survey results involving a small percentage (e.g. less than 10%) of establishments in individual sectors.

(6) The percentages for the three response categories for each variable in the tables/chart may not add up to 100% owing to rounding.

I. 緒言 Introduction

1.1 業務展望按季統計調查涵蓋香港10個主要行業，分別是製造業；建造業；進出口貿易及批發業；零售業；住宿及膳食服務業；運輸、倉庫及速遞服務業；資訊及通訊業；金融及保險業；地產業；以及專業及商用服務業。

1.1 The Quarterly Business Tendency Survey covers 10 major sectors in Hong Kong, namely manufacturing; construction; import/export trade and wholesale; retail; accommodation and food services; transportation, storage and courier services; information and communications; financing and insurance; real estate; and professional and business services sectors.

1.2 這項統計調查旨在搜集香港各行業中約550間大規模的機構單位的高級管理人員對短期業務表現的意見，以在最短時間內，就預測本地不久將來的經濟表現提供快捷的參考。搜集的意見僅是指受訪者對自己機構單位情況的意見，而非他們對所從事行業的情況的意見；以及只限於預期季度間變動的方向（如「上升」、「不變」或「下降」），而並非變動的幅度。搜集季度間變動的意見時，如有關項目受季節性影響，受訪者會提供撇除正常季節性變動後的預期變動。

1.2 The survey aims to collect views on short-term business performance from the senior management of about 550 prominent establishments in various sectors in Hong Kong with a view to providing a quick reference, with minimum time lag, for predicting the short-term future economic performance of the local economy. Views collected refer only to those of respondents on their own establishments rather than those on the respective sectors they are engaged in, and are limited to the expected direction of quarter-to-quarter change (e.g. "up", "same" or "down") but not the magnitude of change. In collecting views on the quarter-to-quarter changes, if the variable in question is subject to seasonal variations, respondents are asked to provide the expected changes after excluding the normal seasonal variations.

1.3 必須注意，就這類有關展望的統計調查而言，受訪者的意見會受進行訪問期間社會上各樣事件的影響，並且很難確定受訪者對將來的看法與基本趨勢的相符程度。2020年第3季的統計調查問卷於2020年6月1日郵寄予選定的機構單位，相應的資料搜集工作在2020年6月2日至2020年7月9日期間進行。

1.3 It has to be noted that in this type of survey on expectations, the views collected in the survey are affected by the events in the community occurring around the time of enumeration, and it is difficult to establish precisely the extent to which respondents' perception of the future accords with the underlying trend. Questionnaires for the Q3 2020 survey were mailed to the selected establishments on 1 June 2020. The corresponding enumeration period was from 2 June 2020 to 9 July 2020.

1.4 這一輪的統計調查成功訪問447間機構單位，整體回應率為81%。

1.4 For this survey round, 447 establishments were successfully enumerated. The overall response rate was 81%.

1.5　　這項統計調查自2009年第1季開始採用「香港標準行業分類2.0版」，劃分受訪機構單位所進行的經濟活動，從而決定這些機構單位所屬行業。

1.6　　統計調查方法的細節（包括所採用的行業分類）刊載於附錄。

1.5 As from the Q1 2009 survey, the Hong Kong Standard Industrial Classification Version 2.0 (HSIC V2.0) has been adopted for classifying the economic activities undertaken by surveyed establishments, based on which the industry sectors to which the establishments belong are determined.

1.6 Details of the survey methodology (including the industrial classification adopted) are given in the Appendix.

II. 結果摘要　Summary of Results

2.1 業務狀況 [圖1，表1]

2.1.1 綜合是項統計調查所涵蓋的行業而言，預期2020年第3季的業務狀況較2020年第2季為差的受訪者(28%)比預期較佳者(17%)所佔的比例為高。

2.1.2 與2020年第2季統計調查的結果比較，預期2020年第3季的業務狀況較上一季為差的受訪者的比例下降至28%，而2020年第2季的相應比例為44%。

2.1.3 按行業分析，在不少涵蓋行業中，受訪者總體而言預期2020年第3季的業務狀況較2020年第2季為差。尤其在地產業中，預期2020年第3季其業務狀況較2020年第2季為差的受訪者比預期業務狀況較佳者顯著為多。另一方面，在住宿及膳食服務業中，預期2020年第3季其業務狀況較2020年第2季為佳的受訪者則比預期業務狀況較差者顯著為多。

2.2 業務／產出量 [表2]

2.2.1 在不少涵蓋行業中，受訪者總體而言預期2020年第3季的業務／產出量較2020年第2季下降。尤其在資訊及通訊業；地產業；專業及商用服務業；運輸、倉庫及速遞服務業；金融及保險業；建造業和進出口貿易及批發業中，有較多的受訪者預期2020年第3季其業務量／建造工程完成量／銷售量較2020年第2季下降。另一方面，在住宿及膳食服務業和製造業中，預期其業務量／生產量上升的受訪者則比預期下降者顯著為多。

2.1 Business situation [Chart 1, Table 1]

2.1.1 For all surveyed sectors taken together, the proportion of respondents expecting their business situation to be worse (28%) in Q3 2020 over Q2 2020 is higher than that expecting it to be better (17%).

2.1.2 When compared with the results of the Q2 2020 survey round, the proportion of respondents expecting a worse business situation in Q3 2020 as compared with the preceding quarter has decreased to 28%, against the corresponding proportion of 44% in Q2 2020.

2.1.3 Analysed by sector, respondents in quite a number of the surveyed sectors expect their business situation to be worse on balance in Q3 2020 as compared with Q2 2020. In particular, significantly more respondents in the real estate sector expect their business situation to be worse in Q3 2020 as compared with Q2 2020, relative to those expecting a better business situation. On the other hand, significantly more respondents in the accommodation and food services sector expect their business situation to be better in Q3 2020 as compared with Q2 2020, relative to those expecting a worse business situation.

2.2 Volume of business/output [Table 2]

2.2.1 Respondents in quite a number of the surveyed sectors expect their volume of business/output to decrease on balance in Q3 2020 as compared with Q2 2020. In particular, more respondents in the information and communications; real estate; professional and business services; transportation, storage and courier services; financing and insurance; construction; and import/export trade and wholesale sectors expect their volume of business/construction output/sales to decrease in Q3 2020 over Q2 2020. On the other hand, significantly more respondents in the accommodation and food services; and manufacturing sectors expect their volume of business/production to increase, as compared to those expecting it to decrease.

2.3 就業 [表3]

2.3.1 在不少涵蓋行業中，受訪者總體而言預期2020年第3季的就業人數與2020年第2季相比大致維持不變。在製造業中，有較多的受訪者預期2020年第3季其就業人數較2020年第2季上升。而另一方面，在建造業中，預期其就業人數下降的受訪者則比預期上升者為多。

2.3 Employment [Table 3]

2.3.1 Respondents in quite a number of the surveyed sectors expect their employment to remain broadly unchanged in Q3 2020 as compared with Q2 2020. More respondents in the manufacturing sector expect their employment to increase in Q3 2020 over Q2 2020. On the other hand, more respondents in the construction sector expect their employment to decrease, as compared to those expecting it to increase.

2.4 貨品售價／服務收費 [表4]

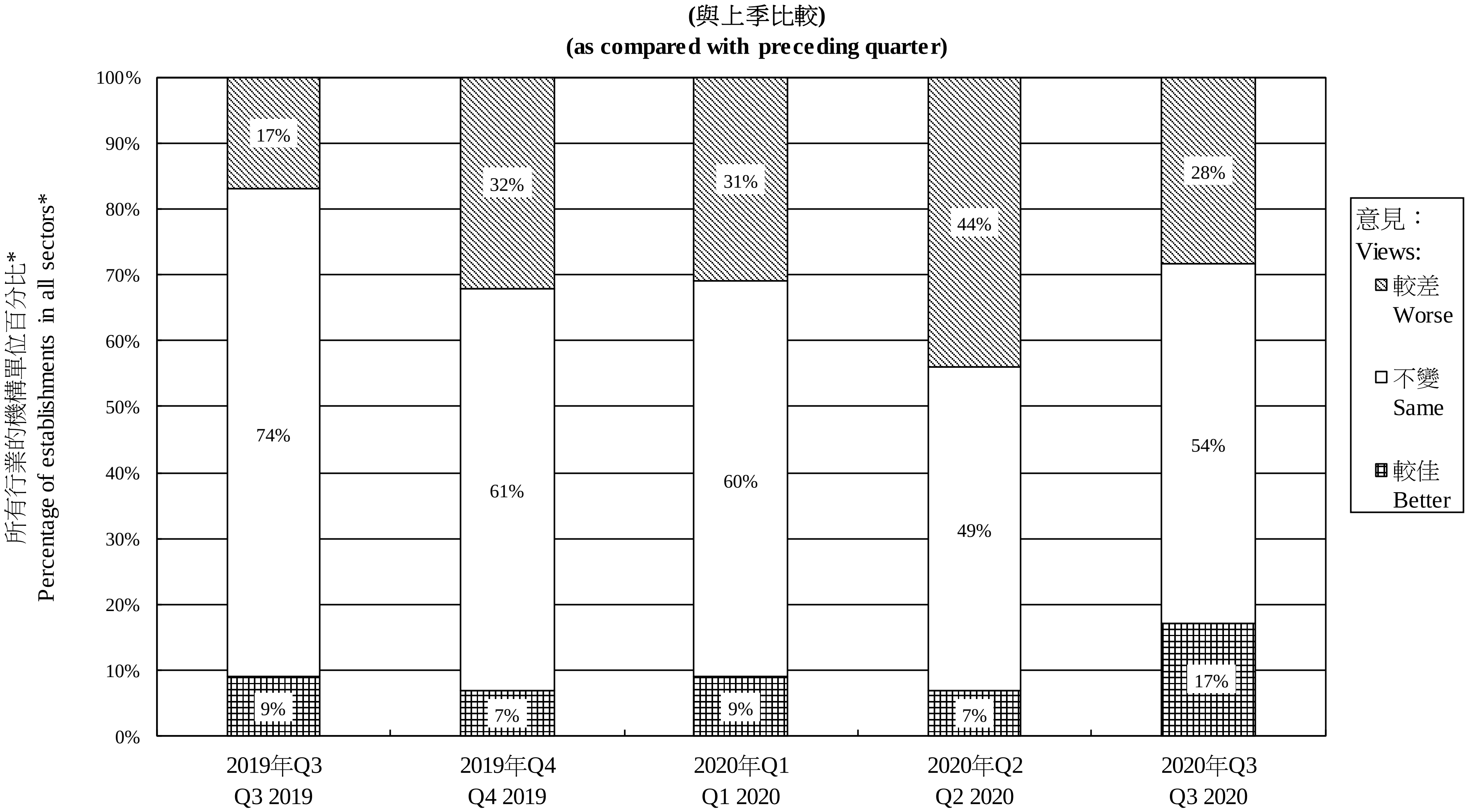
2.4.1 在不少涵蓋行業中，受訪者總體而言預期2020年第3季的貨品售價／服務收費與2020年第2季相比大致維持不變。然而，在建造業中，預期其投標價格在2020年第3季下降的受訪者則顯著較多。

2.4 Selling price/Service charge [Table 4]

2.4.1 Respondents in quite a number of the surveyed sectors expect their selling prices/service charges to remain broadly unchanged in Q3 2020 as compared with Q2 2020. In the construction sector, however, significantly more respondents expect their tender prices to go down in Q3 2020.

圖 1　　有關業務狀況預期變動的意見

Chart 1　Views on expected changes in business situation



* 數字為各行業數字的加權平均數。
Figures are weighted averages of sectoral figures.

表 1 有關業務狀況預期變動的意見

Table 1 Views on expected changes in business situation

行業 Sector	2020年Q3與2020年Q2比較 Q3 2020 as compared with Q2 2020 填報該選擇的機構單位百分比 Percentage of establishments choosing : 較佳 Better (i)	不變 Same (ii)	較差 Worse (iii)	淨差額 (3) = 填報「較佳」的機構單位百分比減去填報「較差」的機構單位百分比 Net balance (3) = Difference between the % of establishments choosing "better" and that choosing "worse" (iv)=(i)-(iii)	2019年Q3與2019年Q2比較 Q3 2019 as compared with Q2 2019	2019年Q4與2019年Q3比較 Q4 2019 as compared with Q3 2019	2020年Q1與2019年Q4比較 Q1 2020 as compared with Q4 2019	2020年Q2與2020年Q1比較 Q2 2020 as compared with Q1 2020
					淨差額(3)= 填報「較佳」的機構單位百分比減去填報「較差」的機構單位百分比 Net balance(3) = Difference between the % of establishments choosing "better" and that choosing "worse"			
製造 Manufacturing	31	47	22	**+9**	**-8**	**-24**	**-27**	**-23**
建造 Construction	9	60	30	**-21**	**-7**	**-45**	**-28**	**-20**
進出口貿易及批發 Import/export trade and wholesale	24	44	32	**-8**	**-8**	**-23**	**-23**	**-42**
零售 Retail	36	49	15	**+21**	**-24**	**-61**	**-39**	**-42**
住宿及膳食服務 (1) Accommodation and food services (1)	49	27	24	**+25**	**-17**	**-44**	**-42**	**-63**
運輸、倉庫及速遞服務 Transportation, storage and courier services	11	56	33	**-22**	**-9**	**-26**	**-33**	**-47**
資訊及通訊 Information and communications	9	61	30	**-21**	**+10**	**+6**	**-2**	**-15**
金融及保險 Financing and insurance	12	62	26	**-14**	**-6**	**-21**	**-16**	**-32**
地產 Real estate	2	69	28	**-26**	**-10**	**-12**	**-18**	**-29**
專業及商用服務 Professional and business services	10	62	28	**-18**	**-3**	**-25**	**-13**	**-37**
所有上列行業 (2) All sectors above (2)	17	54	28	**-11**	**-8**	**-25**	**-22**	**-37**

註釋： (1) 住宿及膳食服務業主要包括酒店及餐館提供的服務。
(2) 數字為各行業數字的加權平均數。（詳情請參閱第22頁附錄的第11段）
(3) 「淨差額」的正或負數值只反映受訪者樂觀或悲觀的普遍程度，而非預期變動的幅度。

Notes : (1) Accommodation and food services sector mainly covers services rendered by hotels and restaurants.
(2) Figures are weighted averages of sectoral figures. (See paragraph 11 of the Appendix on page 22 for details)
(3) The magnitude of the "net balance" reflects only the prevalence of optimism or pessimism, but not the magnitude of expected change.

表 2　有關業務／產出量預期變動的意見

Table 2　Views on expected changes in volume of business/output

行業 Sector	2020年Q3與2020年Q2比較 Q3 2020 as compared with Q2 2020				2019年Q3與2019年Q2比較 Q3 2019 as compared with Q2 2019	2019年Q4與2019年Q3比較 Q4 2019 as compared with Q3 2019	2020年Q1與2019年Q4比較 Q1 2020 as compared with Q4 2019	2020年Q2與2020年Q1比較 Q2 2020 as compared with Q1 2020
	填報該選擇的機構單位百分比 Percentage of establishments choosing :			淨差額 (2) = 填報「上升」的機構單位百分比減去填報「下降」的機構單位百分比 Net balance (2) = Difference between the % of establishments choosing "up" and that choosing "down"	淨差額 (2) = 填報「上升」的機構單位百分比減去填報「下降」的機構單位百分比 Net balance (2) = Difference between the % of establishments choosing "up" and that choosing "down"			
	上升 Up (i)	不變 Same (ii)	下降 Down (iii)	(iv)=(i)-(iii)				
製造 Manufacturing	40	48	12	**+28**	**0**	**-23**	**-11**	**-18**
建造 Construction	15	58	26	**-11**	**+8**	**-12**	**-30**	**-16**
進出口貿易及批發 Import/export trade and wholesale	20	49	31	**-11**	**-5**	**-16**	**-23**	**-38**
零售 Retail	36	41	23	**+13**	**-16**	**-60**	**-33**	**-44**
住宿及膳食服務 (1) Accommodation and food services (1)	47	36	17	**+30**	**-4**	**-36**	**-43**	**-63**
運輸、倉庫及速遞服務 Transportation, storage and courier services	13	56	31	**-18**	**-2**	**-16**	**-29**	**-35**
資訊及通訊 Information and communications	9	61	30	**-21**	**+12**	**+8**	**-7**	**+4**
金融及保險 Financing and insurance	15	58	28	**-13**	**+3**	**-15**	**-12**	**-44**
地產 Real estate	2	75	23	**-21**	**-3**	**-6**	**-12**	**-27**
專業及商用服務 Professional and business services	8	64	28	**-20**	**-4**	**-19**	**-11**	**-33**

註釋：(1) 住宿及膳食服務業主要包括酒店及餐館提供的服務。

(2)「淨差額」的正或負數值只反映受訪者樂觀或悲觀的普遍程度，而非預期變動的幅度。

Notes : (1) Accommodation and food services sector mainly covers services rendered by hotels and restaurants.

(2) The magnitude of the "net balance" reflects only the prevalence of optimism or pessimism, but not the magnitude of expected change.

表 3　有關就業人數預期變動的意見

Table 3　Views on expected changes in number of persons engaged

行業 Sector	2020年Q3與2020年Q2比較 Q3 2020 as compared with Q2 2020 填報該選擇的機構單位百分比 Percentage of establishments choosing : 上升 Up (i)	不變 Same (ii)	下降 Down (iii)	淨差額 (2) = 填報「上升」的機構單位百分比減去填報「下降」的機構單位百分比 Net balance (2) = Difference between the % of establishments choosing "up" and that choosing "down" (iv)=(i)-(iii)	2019年Q3與2019年Q2比較 Q3 2019 as compared with Q2 2019	2019年Q4與2019年Q3比較 Q4 2019 as compared with Q3 2019	2020年Q1與2019年Q4比較 Q1 2020 as compared with Q4 2019	2020年Q2與2020年Q1比較 Q2 2020 as compared with Q1 2020
					淨差額 (2) = 填報「上升」的機構單位百分比減去填報「下降」的機構單位百分比 Net balance (2) = Difference between the % of establishments choosing "up" and that choosing "down"			
製造 Manufacturing	10	90	0	**+10**	**+8**	**+5**	**+3**	**-18**
建造 Construction	3	84	13	**-10**	**+10**	**-20**	**-25**	**-22**
進出口貿易及批發 Import/export trade and wholesale	5	87	8	**-3**	**-5**	**-9**	**-10**	**-13**
零售 Retail	2	91	6	**-4**	**0**	**-21**	**-19**	**-25**
住宿及膳食服務(1) Accommodation and food services (1)	16	75	9	**+7**	**+19**	**-13**	**-9**	**-35**
運輸、倉庫及速遞服務 Transportation, storage and courier services	2	94	4	**-2**	**+6**	**0**	**+1**	**-17**
資訊及通訊 Information and communications	11	76	13	**-2**	**-3**	**-6**	**0**	**-2**
金融及保險 Financing and insurance	10	87	3	**+7**	**+9**	**+11**	**+4**	**-9**
地產 Real estate	5	95	1	**+4**	**+7**	**-6**	**-13**	**-5**
專業及商用服務 Professional and business services	2	91	6	**-4**	**+2**	**-2**	**-8**	**-12**

註釋：(1) 住宿及膳食服務業主要包括酒店及餐館提供的服務。
(2)「淨差額」的正或負數值只反映受訪者樂觀或悲觀的普遍程度，而非預期變動的幅度。

Notes: (1) Accommodation and food services sector mainly covers services rendered by hotels and restaurants.
(2) The magnitude of the "net balance" reflects only the prevalence of optimism or pessimism, but not the magnitude of expected change.

表 4　有關貨品售價／服務收費預期變動的意見

Table 4　Views on expected changes in selling price/service charge

行業 Sector	2020年Q3與2020年Q2比較 Q3 2020 as compared with Q2 2020: 填報該選擇的機構單位百分比 Percentage of establishments choosing : 上升 Up (i)	不變 Same (ii)	下降 Down (iii)	淨差額 (2) = 填報「上升」的機構單位百分比減去填報「下降」的機構單位百分比 Net balance (2) = Difference between the % of establishments choosing "up" and that choosing "down" (iv)=(i)-(iii)	2019年Q3與2019年Q2比較 Q3 2019 as compared with Q2 2019	2019年Q4與2019年Q3比較 Q4 2019 as compared with Q3 2019	2020年Q1與2019年Q4比較 Q1 2020 as compared with Q4 2019	2020年Q2與2020年Q1比較 Q2 2020 as compared with Q1 2020
					淨差額 (2) = 填報「上升」的機構單位百分比減去填報「下降」的機構單位百分比 Net balance (2) = Difference between the % of establishments choosing "up" and that choosing "down"			
製造 Manufacturing	5	92	3	**+2**	**-9**	**+2**	**+5**	**-10**
建造 Construction	3	65	32	**-29**	**-9**	**-18**	**-29**	**-34**
進出口貿易及批發 Import/export trade and wholesale	5	85	10	**-5**	**-3**	**-11**	**-9**	**-19**
零售 Retail	2	85	13	**-11**	**-2**	**-20**	**-15**	**-18**
住宿及膳食服務 (1) Accommodation and food services (1)	14	72	13	**+1**	**-1**	**-15**	**-1**	**-31**
運輸、倉庫及速遞服務 Transportation, storage and courier services	6	87	6	**0**	**+5**	**-7**	**-9**	**-1**
資訊及通訊 Information and communications	2	95	2	**0**	**-2**	**0**	**+8**	**-7**
金融及保險 Financing and insurance	5	85	11	**-6**	**+2**	**-7**	**-1**	**-6**
地產 Real estate	0	91	9	**-9**	**+2**	**-6**	**-2**	**-4**
專業及商用服務 Professional and business services	0	96	4	**-4**	**0**	**-4**	**-2**	**-3**

註釋：(1) 住宿及膳食服務業主要包括酒店及餐館提供的服務。
(2)「淨差額」的正或負數值只反映受訪者樂觀或悲觀的普遍程度，而非預期變動的幅度。

Notes: (1) Accommodation and food services sector mainly covers services rendered by hotels and restaurants.
(2) The magnitude of the "net balance" reflects only the prevalence of optimism or pessimism, but not the magnitude of expected change.

表 5　手頭訂單數量、未完成合約工程量及存貨量的情況

Table 5　Level of orders-on-hand, outstanding contract work and stocks of goods in volume terms

行業 Sector	項目 Variable	2020年6月底左右的情況 Level around end June 2020				2019年6月底左右的情況 Level around end June 2019	2019年9月底左右的情況 Level around end September 2019	2019年12月底左右的情況 Level around end December 2019	2020年3月底左右的情況 Level around end March 2020
		填報該選擇的機構單位百分比 Percentage of establishments choosing :			淨差額 (1) = 填報「較正常為多」的機構單位百分比減去填報「較正常為少」的機構單位百分比 Net balance(1) = Difference between the % of establishments choosing "above normal" and that choosing "below normal" (iv)=(i)-(iii)	淨差額 (1) = 填報「較正常為多」的機構單位百分比減去填報「較正常為少」的機構單位百分比 Net balance (1) = Difference between the % of establishments choosing "above normal" and that choosing "below normal"			
		較正常為多 Above normal (i)	正常 Normal (ii)	較正常為少 Below normal (iii)					
製造 Manufacturing	手頭訂單 Orders-on-hand	0	32	68	**-68**	**-23**	**-35**	**-41**	**-59**
	製成品的存貨 Stocks of finished goods	34	32	34	**0**	**-25**	**+29**	**+19**	**+15**
建造 Construction	未完成合約工程 Outstanding contract work	6	60	34	**-28**	**-8**	**-28**	**-18**	**-29**
進出口貿易及批發 Import/export trade and wholesale	供銷售貨品的存貨 Stocks of goods for sale	22	50	28	**-6**	**-1**	**+2**	**-3**	**-19**
零售 Retail	供銷售貨品的存貨 Stocks of goods for sale	24	49	27	**-3**	**0**	**+5**	**-4**	**-7**

註釋：(1) 「淨差額」的正或負數值只反映受訪者樂觀或悲觀的普遍程度，而非預期變動的幅度。

Note : (1) The magnitude of the "net balance" reflects only the prevalence of optimism or pessimism, but not the magnitude of expected change.

表 6 盈利狀況

Table 6 Profit situation

行業 Sector	2020年Q2 Q2 2020				2019年Q2 Q2 2019	2019年Q3 Q3 2019	2019年Q4 Q4 2019	2020年Q1 Q1 2020
	填報該選擇的機構單位百分比 Percentage of establishments choosing :			淨差額(2)= 填報「良好」的機構單位百分比減去填報「欠佳」的機構單位百分比 Net balance (2) = Difference between the % of establishments choosing "good" and that choosing "poor" (iv)=(i)-(iii)	淨差額(2)= 填報「良好」的機構單位百分比減去填報「欠佳」的機構單位百分比 Net balance(2) = Difference between the % of establishments choosing "good" and that choosing "poor"			
	良好 Good (i)	尚可 Fair (ii)	欠佳 Poor (iii)					
製造 Manufacturing	12	47	41	**-29**	**+16**	**+10**	**+8**	**-21**
建造 Construction	22	59	18	**+4**	**+26**	**+17**	**+25**	**-5**
進出口貿易及批發 Import/export trade and wholesale	15	60	25	**-10**	**+37**	**+28**	**+22**	**-7**
零售 Retail	5	51	44	**-39**	**+28**	**-9**	**-34**	**-49**
住宿及膳食服務(1) Accommodation and food services (1)	5	21	74	**-69**	**+31**	**-19**	**-38**	**-79**
運輸、倉庫及速遞服務 Transportation, storage and courier services	16	40	44	**-28**	**+26**	**+12**	**-1**	**-15**
資訊及通訊 Information and communications	29	62	10	**+19**	**+33**	**+20**	**+36**	**+25**
金融及保險 Financing and insurance	23	62	16	**+7**	**+41**	**+40**	**+36**	**+23**
地產 Real estate	74	26	0	**+74**	**+77**	**+52**	**+66**	**+57**
專業及商用服務 Professional and business services	30	48	21	**+9**	**+56**	**+36**	**+36**	**+13**

註釋：(1) 住宿及膳食服務業主要包括酒店及餐館提供的服務。

(2)「淨差額」的正或負數值只反映受訪者樂觀或悲觀的普遍程度，而非預期變動的幅度。

Notes : (1) Accommodation and food services sector mainly covers services rendered by hotels and restaurants.

(2) The magnitude of the "net balance" reflects only the prevalence of optimism or pessimism, but not the magnitude of expected change.

表 7 財務狀況
Table 7 Financial situation

行業 Sector	2020年Q2 Q2 2020				2019年Q2 Q2 2019	2019年Q3 Q3 2019	2019年Q4 Q4 2019	2020年Q1 Q1 2020
	填報該選擇的機構單位百分比 Percentage of establishments choosing :			淨差額 (2) = 填報「良好」的機構單位百分比減去填報「欠佳」的機構單位百分比 Net balance (2) = Difference between the % of establishments choosing "good" and that choosing "poor" (iv)=(i)-(iii)	淨差額 (2) = 填報「良好」的機構單位百分比減去填報「欠佳」的機構單位百分比 Net balance (2) = Difference between the % of establishments choosing "good" and that choosing "poor"			
	良好 Good (i)	尚可 Fair (ii)	欠佳 Poor (iii)					
製造 Manufacturing	39	45	17	**+22**	**+35**	**+49**	**+28**	**+19**
建造 Construction	35	56	9	**+26**	**+53**	**+50**	**+46**	**+27**
進出口貿易及批發 Import/export trade and wholesale	39	53	8	**+31**	**+48**	**+47**	**+47**	**+41**
零售 Retail	21	60	19	**+2**	**+52**	**+42**	**+28**	**+5**
住宿及膳食服務 (1) Accommodation and food services (1)	8	72	19	**-11**	**+53**	**+20**	**+20**	**-5**
運輸、倉庫及速遞服務 Transportation, storage and courier services	27	56	17	**+10**	**+48**	**+42**	**+36**	**+25**
資訊及通訊 Information and communications	55	42	2	**+53**	**+50**	**+39**	**+52**	**+44**
金融及保險 Financing and insurance	57	43	0	**+57**	**+59**	**+68**	**+60**	**+54**
地產 Real estate	85	15	0	**+85**	**+84**	**+73**	**+75**	**+78**
專業及商用服務 Professional and business services	40	55	6	**+34**	**+58**	**+53**	**+51**	**+31**

註釋：(1) 住宿及膳食服務業主要包括酒店及餐館提供的服務。

(2)「淨差額」的正或負數值只反映受訪者樂觀或悲觀的普遍程度，而非預期變動的幅度。

Notes : (1) Accommodation and food services sector mainly covers services rendered by hotels and restaurants.

(2) The magnitude of the "net balance" reflects only the prevalence of optimism or pessimism, but not the magnitude of expected change.

表 8 獲取信貸的狀況

Table 8 Access to credit situation

行業 Sector	2020年Q2 Q2 2020 填報該選擇的機構單位百分比 Percentage of establishments choosing : 容易 Easy (i)	尚可 Fair (ii)	困難 Tight (iii)	淨差額(2) = 填報「容易」的機構單位百分比減去填報「困難」的機構單位百分比 Net balance(2) = Difference between the % of establishments choosing "easy" and that choosing "tight" (iv)=(i)-(iii)	2019年Q2 Q2 2019	2019年Q3 Q3 2019	2019年Q4 Q4 2019	2020年Q1 Q1 2020
					淨差額(2) = 填報「容易」的機構單位百分比減去填報「困難」的機構單位百分比 Net balance(2) = Difference between the % of establishments choosing "easy" and that choosing "tight"			
製造 Manufacturing	58	29	13	**+45**	**+52**	**+49**	**+53**	**+43**
建造 Construction	47	49	4	**+43**	**+48**	**+48**	**+43**	**+30**
進出口貿易及批發 Import/export trade and wholesale	47	51	1	**+46**	**+55**	**+58**	**+58**	**+56**
零售 Retail	25	72	3	**+22**	**+57**	**+40**	**+36**	**+30**
住宿及膳食服務(1) Accommodation and food services (1)	22	64	14	**+8**	**+53**	**+38**	**+25**	**+20**
運輸、倉庫及速遞服務 Transportation, storage and courier services	41	51	8	**+33**	**+71**	**+71**	**+57**	**+40**
資訊及通訊 Information and communications	53	44	3	**+50**	**+54**	**+45**	**+63**	**+49**
金融及保險 Financing and insurance	55	45	0	**+55**	**+52**	**+61**	**+57**	**+50**
地產 Real estate	80	20	0	**+80**	**+68**	**+61**	**+74**	**+78**
專業及商用服務 Professional and business services	42	52	6	**+36**	**+54**	**+53**	**+58**	**+38**

註釋： (1) 住宿及膳食服務業主要包括酒店及餐館提供的服務。

(2)「淨差額」的正或負數值只反映受訪者樂觀或悲觀的普遍程度，而非預期變動的幅度。

Notes : (1) Accommodation and food services sector mainly covers services rendered by hotels and restaurants.

(2) The magnitude of the "net balance" reflects only the prevalence of optimism or pessimism, but not the magnitude of expected change.

表 9 有關限制機構單位業務增長的因素的意見 (1)
Table 9 Views on factors limiting the establishment's ability to increase business activities (1)

行業 Sector	表示並無任何因素限制其業務增長的機構單位百分比 Percentage of establishments indicating that there were no factors limiting their ability to increase business activities	限制機構單位業務增長的因素 Factors limiting the establishment's ability to increase business activities					
		最重要因素 (3) The most important factor (3)		第二重要因素 (3) The 2nd most important factor (3)		第三重要因素 (3) The 3rd most important factor (3)	
製造 Manufacturing	23	外圍經濟環境變化引致的不明朗經濟前景 Uncertain economic outlook caused by change in external economic environment	(38%)	本地需求轉弱 Weaker domestic demand	(27%)	香港以外地方的需求轉弱 Weaker demand from places outside Hong Kong	(23%)
建造 Construction	34	本地基建工程減少 Decrease in local infrastructure projects	(41%)	業內競爭劇烈 Keen competition within own sector	(41%)	勞工成本高昂 High labour cost	(22%)
進出口貿易及批發 Import/export trade and wholesale	37	外圍經濟環境變化引致的不明朗經濟前景 Uncertain economic outlook caused by change in external economic environment	(31%)	香港以外地方的需求轉弱 Weaker demand from places outside Hong Kong	(22%)	本地需求轉弱 Weaker domestic demand	(18%)
零售 Retail	21	旅客需求轉弱 Weaker demand from tourists	(36%)	外圍經濟環境變化引致的不明朗經濟前景 Uncertain economic outlook caused by change in external economic environment	(33%)	本地需求轉弱 Weaker domestic demand	(21%)
住宿及膳食服務 (2) Accommodation and food services (2)	22	外圍經濟環境變化引致的不明朗經濟前景 Uncertain economic outlook caused by change in external economic environment	(46%)	旅客需求轉弱 Weaker demand from tourists	(41%)	本地需求轉弱 Weaker domestic demand	(24%)
運輸、倉庫及速遞服務 Transportation, storage and courier services	27	外圍經濟環境變化引致的不明朗經濟前景 Uncertain economic outlook caused by change in external economic environment	(38%)	香港以外地方的需求轉弱 Weaker demand from places outside Hong Kong	(18%)	本地需求轉弱 Weaker domestic demand	(18%)

表 9 有關限制機構單位業務增長的因素的意見 (續)[1]
Table 9 Views on factors limiting the establishment's ability to increase business activities (cont'd)[1]

行業 Sector	表示並無任何因素限制其業務增長的機構單位百分比 Percentage of establishments indicating that there were no factors limiting their ability to increase business activities	限制機構單位業務增長的因素 Factors limiting the establishment's ability to increase business activities 最重要因素[3] The most important factor[3]		第二重要因素[3] The 2nd most important factor[3]		第三重要因素[3] The 3rd most important factor[3]	
資訊及通訊 Information and communications	30	本地需求轉弱 Weaker domestic demand	(33%)	外圍經濟環境變化引致的不明朗經濟前景 Uncertain economic outlook caused by change in external economic environment	(30%)	業內競爭劇烈 Keen competition within own sector	(22%)
金融及保險 Financing and insurance	32	外圍經濟環境變化引致的不明朗經濟前景 Uncertain economic outlook caused by change in external economic environment	(45%)	業內競爭劇烈 Keen competition within own sector	(30%)	香港以外地方的需求轉弱 Weaker demand from places outside Hong Kong	(23%)
地產 Real estate	65	外圍經濟環境變化引致的不明朗經濟前景 Uncertain economic outlook caused by change in external economic environment	(23%)	本地需求轉弱 Weaker domestic demand	(15%)	業內競爭劇烈 Keen competition within own sector	(10%)
專業及商用服務 Professional and business services	46	外圍經濟環境變化引致的不明朗經濟前景 Uncertain economic outlook caused by change in external economic environment	(30%)	業內競爭劇烈 Keen competition within own sector	(26%)	本地需求轉弱 Weaker domestic demand	(20%)

註釋：
(1) 問卷上載列了一些在進行統計調查時（即2020年6月2日至2020年7月9日）可能限制業務增長的因素，受訪者會從中選擇最多三項最重要的因素。
(2) 住宿及膳食服務業主要包括酒店及餐館提供的服務。
(3) 括號內的數字指選擇這項因素的機構單位百分比。

Notes:
(1) Respondents were given a list of factors that might limit their ability to increase business activities at the time of enumeration (i.e. 2 June 2020 to 9 July 2020) and they were asked to choose the most important ones, at most three, from the list.
(2) Accommodation and food services sector mainly covers services rendered by hotels and restaurants.
(3) Figures in brackets denote the percentages of establishments choosing the factor.

附錄　Appendix

統計調查方法

背景

政府統計處在1977至1993年間進行「業務按季統計調查」，並在1994至2002年間進行「業務展望按半年統計調查」，搜集香港各行業的機構單位對業務展望的意見，就預測本地不久將來的經濟表現提供快捷的參考。

2.　經濟合作及發展組織自1999年開始倡議協調在不同國家／地區進行的業務展望統計調查。所建議的新模式廣為亞太區經濟體系所認同。經過深入研討和精細策劃後，政府統計處於2002年12月中至2003年1月中參照經濟合作及發展組織的建議，開展「業務展望按季統計調查」，以取代「業務展望按半年統計調查」。與「業務展望按半年統計調查」比較，「業務展望按季統計調查」較優勝的地方包括能提供更及時的業務展望指標；透過縮短展望期以加強指標的預測能力；及使統計調查結果可與其他國家／地區作比較。

Survey Methodology

Background

The Census and Statistics Department (C&SD) conducted the Quarterly Business Survey during 1977-1993 and the Half-yearly Business Prospects Survey (HBPS) during 1994-2002. These surveys collected views from establishments engaged in various sectors in Hong Kong on business expectations with a view to providing a quick reference for predicting the short-term future economic performance of the local economy.

2. The Organisation for Economic Co-operation and Development (OECD) has been advocating since 1999 a harmonisation of business tendency surveys to be conducted in various economies. The new format proposed was widely accepted by the Asia Pacific economies. After thorough deliberation and planning, the C&SD launched the new Quarterly Business Tendency Survey (QBTS) in mid-December 2002 to mid-January 2003 to replace the HBPS in line with OECD's recommendations. Compared with the HBPS, major enhancements of the QBTS include providing more up-to-date indicators on business tendency; improving the predictive power through shortening the look-ahead period; and facilitating international comparison.

統計調查目的

3. 這項統計調查旨在搜集香港各行業中大規模的機構單位的高級管理人員對短期業務表現的意見，以在最短時間內，就預測本地不久將來的經濟表現提供快捷的參考。有關預期季度間變動的意見只限於變動的方向（如「上升」、「不變」或「下降」），而非變動的幅度。

有關法例

4. 這項統計調查是根據《普查及統計條例》（第316章）第IIIA部進行，屬自願參與性質，並在香港特別行政區政府憲報於2002年11月29日所刊登的第7700號政府公告上宣布進行。條例規定，政府統計處必須對所有搜集得來可分辨個別機構單位的資料嚴加保密及只作統計用途，日後只發表整體性的資料，而不會顯示個別機構的資料。

行業範圍及抽選樣本

5. 這項統計調查的抽樣框是以政府統計處備存的機構單位紀錄庫為基礎。此紀錄庫根據稅務局商業登記署的資料進行更新。

Survey objectives

3. The survey aims to collect views on short-term business performance from the senior management of prominent establishments in various sectors in Hong Kong with a view to providing a quick reference, with minimum time lag, for predicting the short-term future economic performance of the local economy. Views on the expected quarter-to-quarter changes refer to the direction of change only (e.g. "up", "same" or "down"), but not the magnitude of change.

Legislation

4. The Survey is conducted under Part IIIA of the Census and Statistics Ordinance (Chapter 316). It was notified as a voluntary statistical survey in the Government Notice No. 7700 in the Government of the Hong Kong Special Administrative Region Gazette of 29 November 2002. The Ordinance stipulates that all collected information which may enable identification of individual establishments should be kept in strict confidence and be used solely for statistical purpose. Only aggregate information, which does not reveal details of individual establishments, will be released.

Industry coverage and sample selection

5. The sampling frame of this survey is based on the Central Register of Establishments maintained by the C&SD and updated by reference to records of the Business Registration Office of the Inland Revenue Department.

6. 這項統計調查採用「香港標準行業分類」，劃分受訪機構單位所進行的經濟活動，從而決定這些機構單位所屬行業。「香港標準行業分類」是以聯合國的「國際標準行業分類」為藍本，配合本地情況作出編訂，從而反映本港經濟結構。這項統計調查自2009年第1季開始採用「香港標準行業分類2.0版」，以取代「香港標準行業分類1.1版」。有關「香港標準行業分類2.0版」的細節，尤其是由「香港標準行業分類1.1版」轉為「香港標準行業分類2.0版」所涉及的改變，可參閱刊載於《香港統計月刊》2008年11月號內題為「修訂「香港標準行業分類」」的專題文章。

7. 這項統計調查的抽樣框先劃分成多個行業分層，然後在這些分層抽選大規模的機構單位進行訪問。2020年第3季的統計調查從下列10個主要行業中抽選共約550間大規模的機構單位進行訪問：

包括的行業	相應的「香港標準行業分類 2.0 版」行業分組編號
製造	10-33
建造	41-43
進出口貿易及批發	45-46
零售	47
住宿及膳食服務 (1)	55-56
運輸、倉庫及速遞服務	49-52 及 532
資訊及通訊	58-63
金融及保險	64-66
地產 (2)	68
專業及商用服務 (3)	69-75 及 77-82

(1) 住宿及膳食服務業主要包括酒店及餐館提供的服務。

(2) 地產業包括地產發展、租賃、經紀及代理、保養管理，以及其他地產服務。

(3) 專業及商用服務業包括專業、科學及技術服務，以及行政及支援服務。

6. The Hong Kong Standard Industrial Classification (HSIC) is adopted for classifying the economic activities undertaken by surveyed establishments, based on which the industry sectors to which the establishments belong are determined. The HSIC is devised by using the United Nations' International Standard Industrial Classification as a framework, with local adaptation to reflect the structure of the Hong Kong economy. HSIC Version 2.0 (HSIC V2.0) has been adopted in place of HSIC V1.1 as from the Q1 2009 round of the survey. More details about HSIC V2.0, particularly the changeover from HSIC V1.1, are available in the feature article entitled "Revision of the Hong Kong Standard Industrial Classification" published in the November 2008 issue of the *Hong Kong Monthly Digest of Statistics*.

7. The sampling frame of this survey is first stratified into a number of industry strata. Prominent establishments are then selected from these strata for enumeration. The Q3 2020 round of the survey selected a sample of about 550 prominent establishments in the following 10 major sectors for enumeration:

Sectors covered	**Corresponding codes under HSIC V2.0**
Manufacturing	10-33
Construction	41-43
Import/export trade and wholesale	45-46
Retail	47
Accommodation and food services (1)	55-56
Transportation, storage and courier services	49-52 and 532
Information and communications	58-63
Financing and insurance	64-66
Real estate (2)	68
Professional and business services (3)	69-75 and 77-82

(1) Accommodation and food services sector mainly covers services rendered by hotels and restaurants.

(2) Real estate sector covers real estate development, leasing, brokerage and agency, maintenance management, and other real estate services.

(3) Professional and business services sector covers professional, scientific and technical services, and administrative and support services.

資料搜集

8.　　每一輪的統計調查問卷會郵寄予選定的機構單位。此外，亦製備問卷的電子版本，以供索取應用。為方便受訪機構單位提交問卷資料，這項統計調查亦備有網上問卷供填寫。這項統計調查是以郵遞或透過互聯網方式搜集資料，有需要時再輔以電話或面談訪問以搜集及核實有關資料。

季節性調整

9.　　有關來季與今季比較的預期變動的問題（表1 - 4），若有關項目受季節性變動影響，受訪者會提供撇除正常季節性變動後的預期變動。例如，若每年第1季的業務／產出量因受到季節性變動影響一般較上年第4季為高，但受訪者預期這年的升幅較正常小，則在撇除正常的季節性升幅後，應回答兩季之間的業務／產出量是「下降」而非「上升」。

統計調查結果的編製及詮釋

10.　　這項統計調查搜集受訪者對多個經濟項目的預期變動、訂單及存貨量的情況和限制業務增長因素的意見。這項統計調查只搜集受訪者對其機構單位情況的意見，而非他們對所從事行業的意見。因此，統計調查結果未必能充分反映那些不斷有機構單位加入／離開的迅速增長／衰退行業的情況。有關現時情況及預期變動的回應，是以三個不同組別供受訪者選擇，例如對業務量預期變動的回應分為「上升」、「不變」及「下降」。

Data collection

8. Questionnaires for each round of the survey are mailed to the selected establishments. An electronic template of the questionnaire is also available for use upon request. To facilitate respondents in providing information, an online questionnaire is also introduced for this survey. Data are collected by post or via the internet, supplemented by telephone or face-to-face enumeration and verification where necessary.

Seasonal adjustment

9. For the questions on expected changes for the coming quarter as compared with the current quarter (Tables 1 - 4), if the variable in question is subject to seasonal variations, respondents are asked to provide the expected changes after excluding the normal seasonal variations. For example, if the volume of business/output is normally higher in Q1 each year as compared with Q4 of the preceding year due to seasonal variations, but it is expected that the increase this year would be smaller than the normal increase, then after excluding the normal seasonal increase, the answer should be "down" instead of "up" for volume of business/output between the two quarters concerned.

Compilation and interpretation of results

10. The survey solicits views from respondents regarding expected changes of a number of economic variables, situation regarding orders and inventories, as well as factors limiting increase in business activities. The survey only collects views of respondents on their own establishments rather than those on the respective sectors they are engaged in. As such, survey findings might not fully reflect the situation of those booming/declining industries with firms joining/leaving continuously. Responses on present situation and expected changes are expressed in terms of three categories. For example, responses on expected changes in volume of business are expressed in terms of "up", "same" and "down".

11. 統計調查結果的編製方法，是首先計算每一分層（主要是行業組別）中填報各回應組別的機構單位的百分比作為分層估算；然後把各分層估算加權及累加後，得出有關行業（請參閱第7段）填報個別回應組別的機構單位所佔的百分比。整體估算則為所有行業估算的加權平均數。有關就業項目的權數為各分層的「就業人數」，而所有其他項目的權數則為「增加價值」。

11. In compiling the survey results, the percentages of establishments choosing individual response categories within each stratum, which is mainly at industry grouping level, are first computed to arrive at stratum estimates. These stratum estimates are then weighted and summed up to give the percentages of establishments choosing individual responses for the corresponding sectors (please see paragraph 7). Overall estimates are weighted averages of all sectoral estimates. Weights for the variable on employment are "number of persons engaged" of various strata, while weights for all other variables are "value added".

12. 統計調查結果一般以「**淨差額**」表示，即填報「上升」的機構單位百分比減去填報「下降」的機構單位百分比。填報不同回應組別（如「上升」、「不變」及「下降」）的機構單位的百分比分布反映他們對業務展望的差異程度。「淨差額」的正負符號反映該項目的預期變動的方向。正數反映有關項目有可能上升的趨勢，而負數則反映有可能下降的趨勢。不過，正或負數值只反映受訪者樂觀或悲觀的**普遍程度**，而**非**預期變動的**幅度**，因這項統計調查並沒有搜集有關該幅度的資料。

12. Survey results are generally presented as "**net balance**", i.e. the difference between the percentage of establishments choosing "up" and that choosing "down". The percentage distribution of establishments among various response categories (e.g. "up", "same" and "down") reflects how varied their business expectations are. The "net balance", with its appropriate sign, indicates the direction of expected change in the variable concerned. A positive sign indicates a likely upward trend while a negative sign indicates a likely downward trend. However, the magnitude of the "net balance" reflects only the **prevalence** of optimism or pessimism, but **not** the **magnitude** of expected change, since information relating to such magnitude is not collected in the survey.

13. 由於樣本規模有所局限，在個別行業中，涉及小數值的機構單位百分比（如小於10%）的統計調查結果，須謹慎闡釋。

13. Owing to sample size constraint, care should be taken in interpreting survey results involving a small percentage (e.g. less than 10%) of establishments in individual sectors.

14. 由於一個搜集業務展望意見的統計調查所涉及的技術困難很多，所以闡釋這類統計調查的結果亦不容易。雖然讀者可就幾輪統計調查的結果，大概掌握到受訪者填報資料行為的一些傾向，作為分析統計調查結果的參考，但根據有關的專業意見，一個較謹慎的做法是在評估經濟狀況時，不應單一取材這類統計調查所得的意見而作出結論，而應一併參考其他有關的統計數據和經濟資料。

14. As the subject of an opinion survey on business expectations is a technically difficult one, interpretation of survey results of this kind is not easy. A safe way of using the results, as experts in this field advise, is not to look at them entirely in isolation, even though certain trends in reporting behaviour which could aid interpretation may have evolved after a number of rounds. Instead, other statistics and economic information should be referred to at the same time when assessing the economic situation.

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