



2022 香港美國商會 商業前景調查

調查結果報告

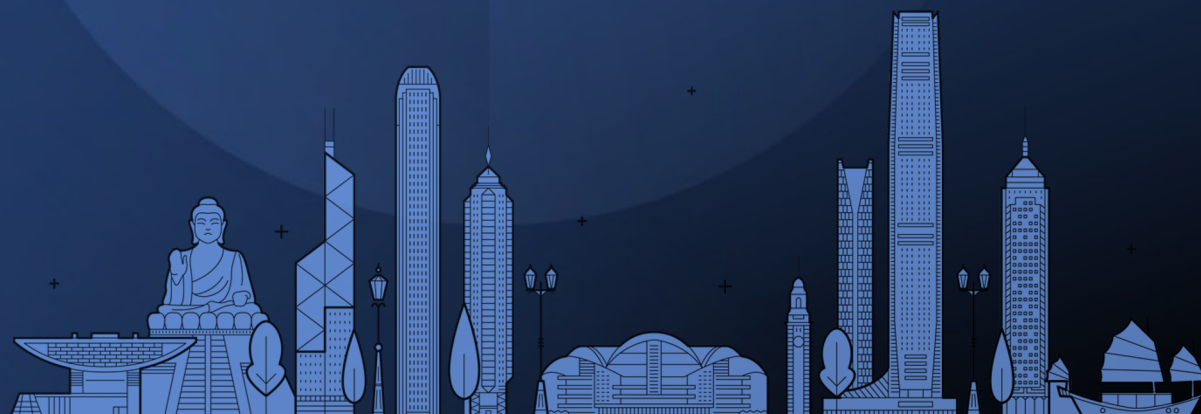
2022 年 1 月





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調查詳情



目標受訪者

香港美國商會會員



方法

線上問卷

問卷是由美國商會設計，並由獨立研究機構 Intuit Research 負責管理調查。



樣本

262名香港美國商會會員

- 151名主要企業代表
- 111名個人會員



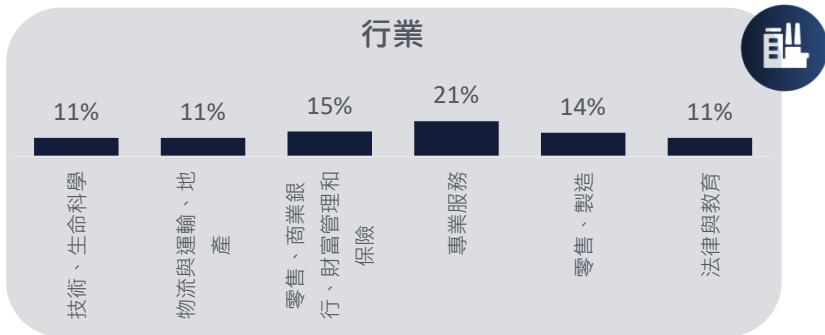
調查時間

2021年9月10日至10月8日

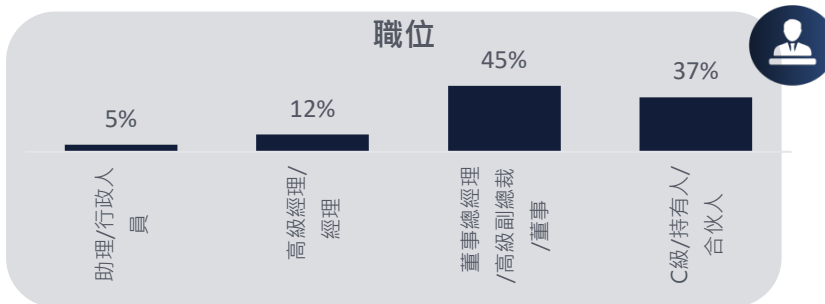


受訪者簡介

行業



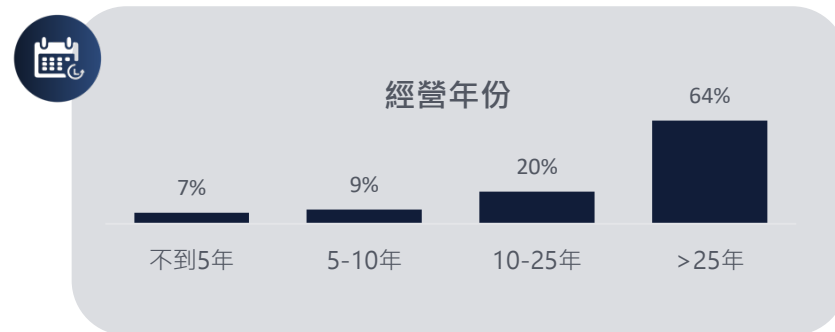
職位



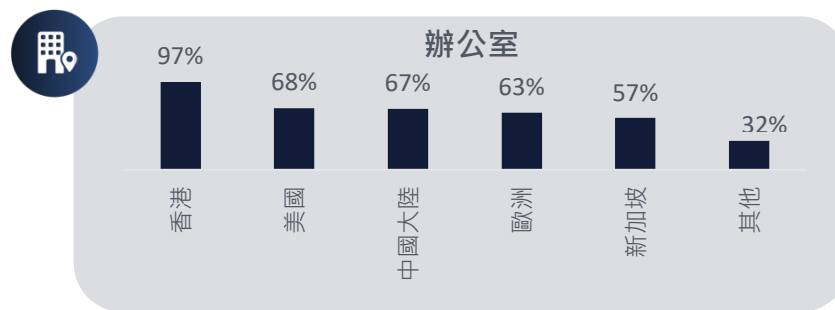
員工



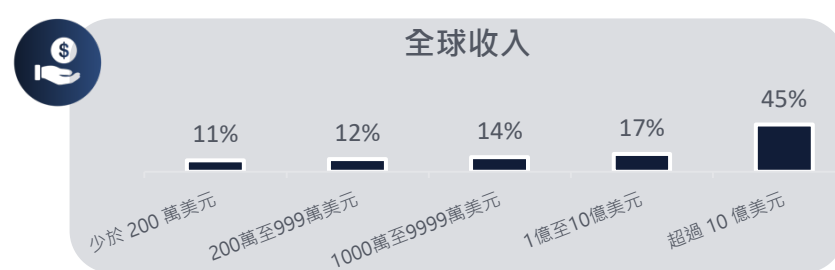
經營年份



辦公室



全球收入





調查結果摘要

香港仍然擁有商機，但市場情緒因嚴厲的旅遊限制和中美關係惡化等一系列問題而受到打壓。

- 9% (淨值) 的美國商會企業會員認為明年香港的商業環境將有所改善——其中金融服務、運輸和物流行業的受訪者最為樂觀。
- 然而，香港為遏制「2019冠狀病毒疫情」而實施的國際旅行限制嚴重影響了企業和個人的情緒。嚴格的檢疫規定和旅行限制繼續造成重大干擾，推遲新投資，並令香港招聘高級行政人才變得困難。
- 從企業和個人的角度來看，這些限制也影響了人們對在香港生活的情緒。超過 40% 的受訪者表示，他們更有可能從個人角度離開香港，而超過 25% 的企業表示他們更有可能離開香港。預計新加坡將成為主要受益者。
- 有被訪者認為外國企業在香港不太受歡迎。超過一半的受訪者認為政府對商業問題漠不關心和不屑一顧。
- 美國商會企業和個人會員皆對香港法治感到越來越悲觀，企業會員對此尤其關注。
- 此外，每 10 家企業中就有超過 8 家受到香港《國家安全法》的影響。近一半企業認為員工士氣受到影響，並表示有員工因此移民。
- 相對來說，美國對香港官員的制裁對企業的影響小得多。
- 受訪者認為香港仍然擁有高度的數據自由，但對於數據自由將在未來 3 年內保持不變一說上感到悲觀。
- 在研發方面，深圳和新加坡超越香港，成為受青睞的地方，而科技公司從香港與深圳和中國大陸南方九個城市的經濟整合計劃中受益最大。預計財富管理行業也將受益於大灣區的發展。但受訪者表示，人口流動的監管以及法律法規的清晰度仍然是最大的障礙。



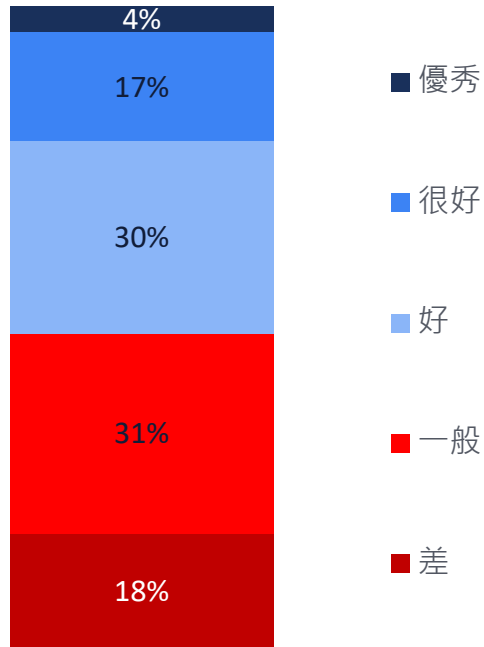
香港商業及投資前景



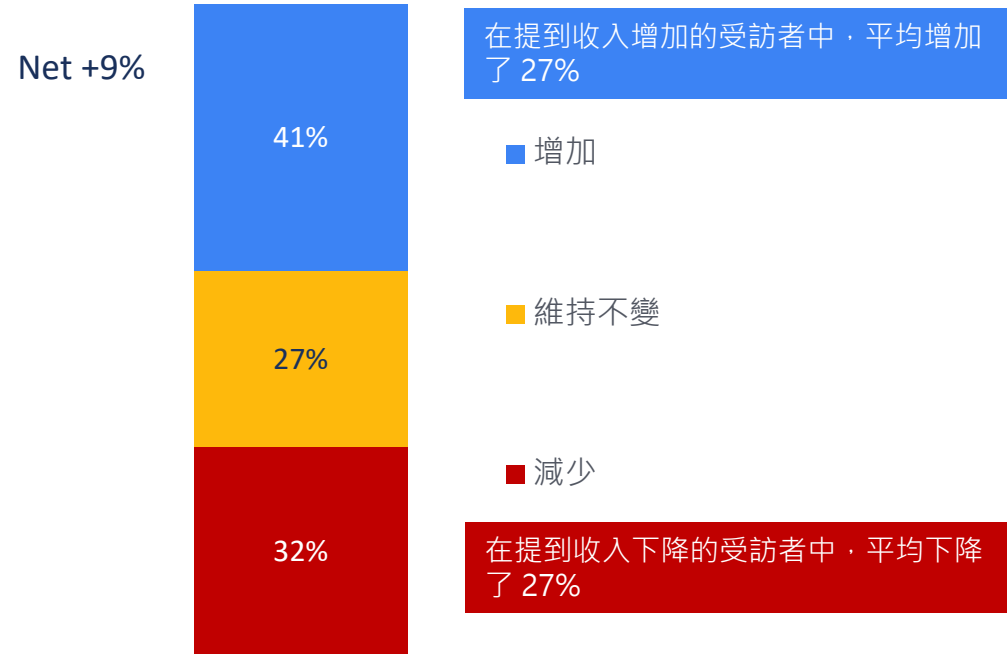
香港近期商業環境

情況喜憂參半，但收入增加的企業略多於收入下降的企業

過去 12 個月的商業環境



2020 年與 2019 年的收入變化



B1. What is your/your company's assessment of Hong Kong's business environment over the past 12 months?

B3. How did your company's total 2020 revenues in Hong Kong compare to 2019?

B4.1. If answered "Increased" in previous question, by what % did it increase? B4.2. If answered "Decreased" in previous question, by what % did it decrease?

Base: All Respondents n=262

淨值 = 正 - 負比例 (不包括中性比例) 7

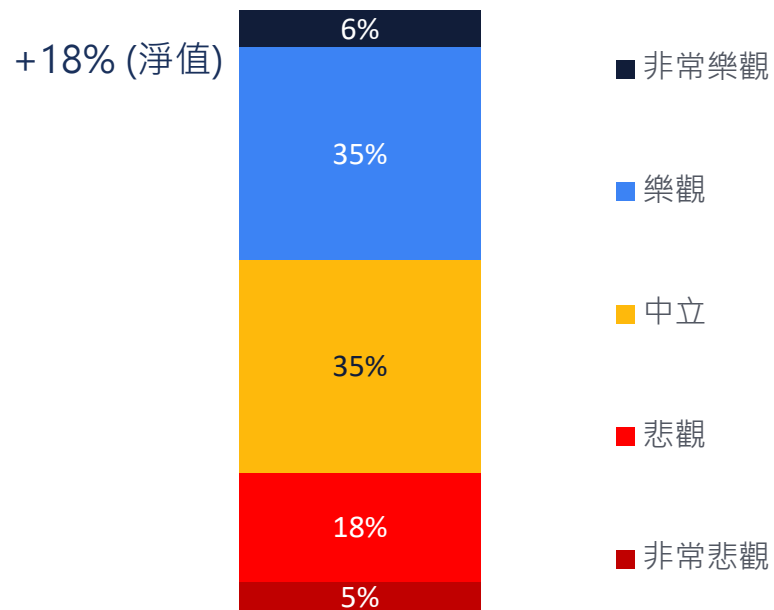




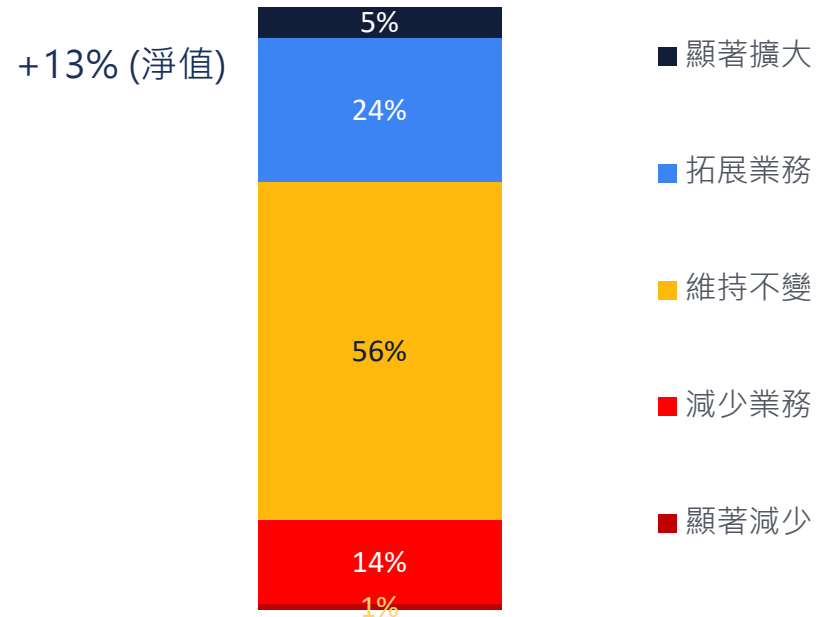
商業前景和投資計劃

企業普遍對商業前景持樂觀態度，更多是計劃擴大而不是減少投資

未來 12 個月的商業前景



未來兩年的投資計劃



B2. What is your/your company's expectation of Hong Kong's business environment in the next 12 months?

B5. What are your company's investment plans in Hong Kong over the next two years?

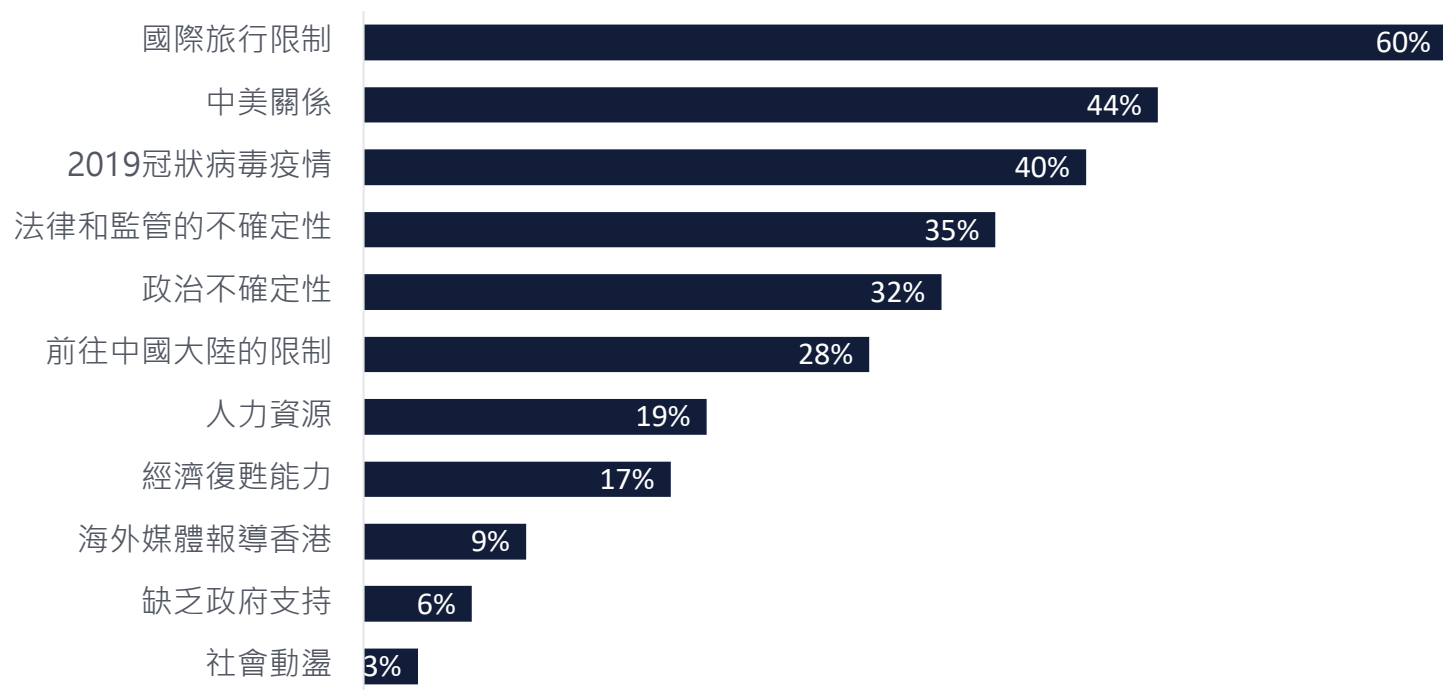
Base: All Respondents n=262



商業挑戰

旅遊限制、中美關係緊張以及繼續應對「2019冠狀病毒疫情」是最顯著的商業挑戰。

主要商業挑戰



B7. What are Hong Kong's top business challenges over the coming 12 months? Please select the top 3 and rank them from 1 being highest to 3 being lowest.
Base: All Respondents n=262

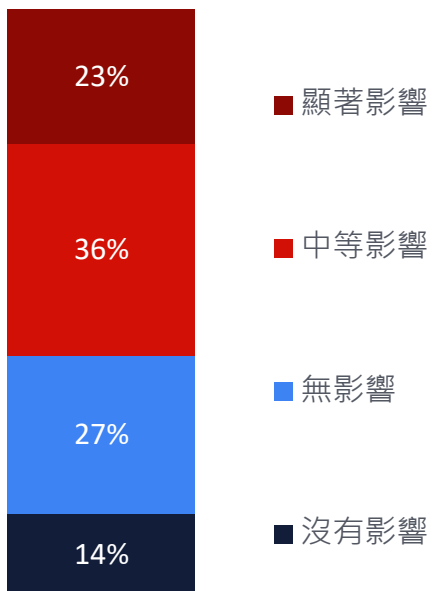


中美關係

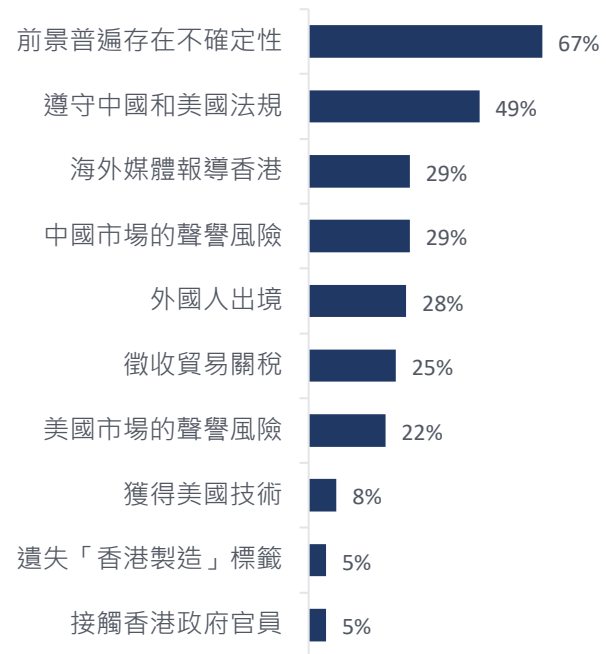
86% 的企業提到中美關係對其業務有一定影響。其不確定性導致企業對前景普遍感到悲觀。

最近三年中美關係對企業的影響

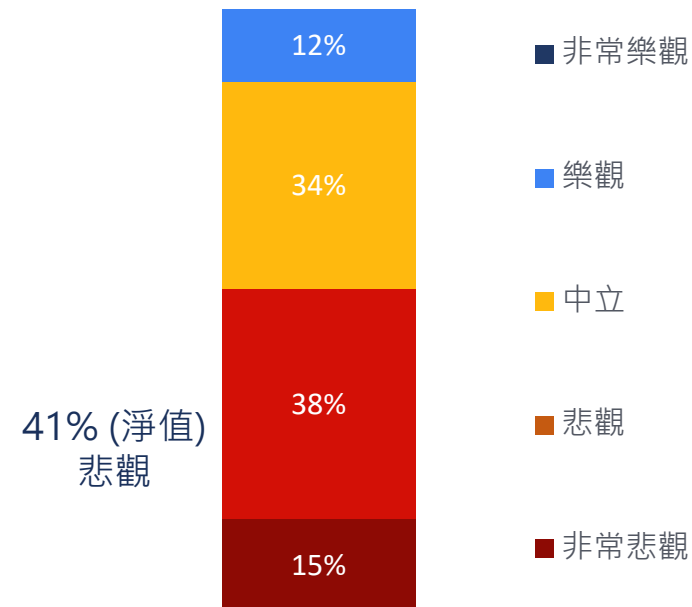
59% 中度至顯著影響



中美關係對企業最大的影響



中美關係前景



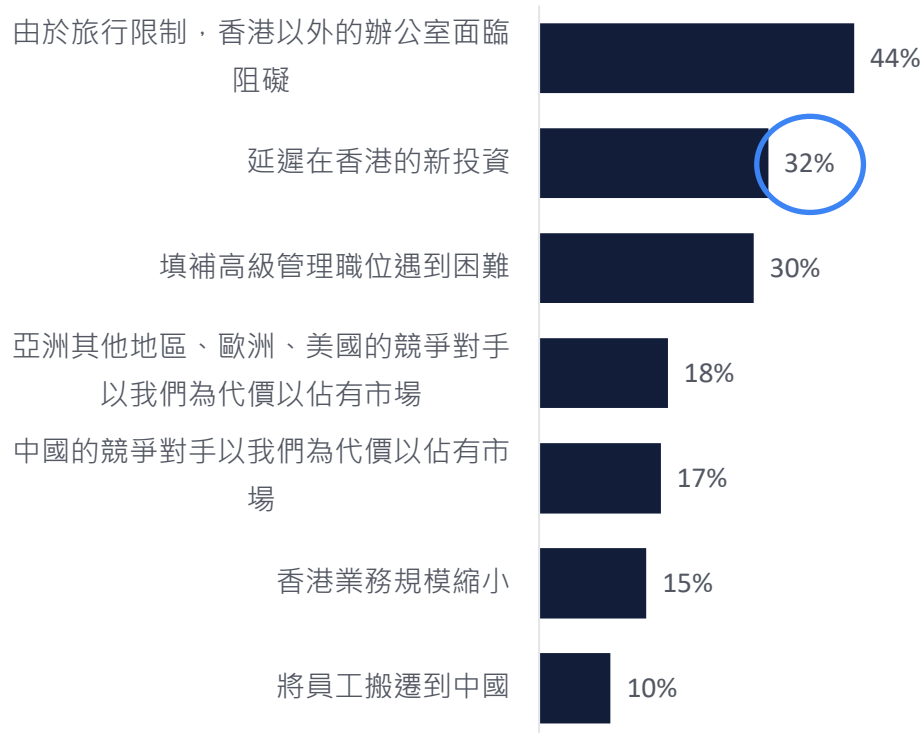
11. Have US-China relations had an impact on your company's business in the past three years?
 12. Which issues have had the greatest impact on your company? Please select three and rank them from 1 being highest to 3.
 13. How optimistic are you about an improvement in US-China relations over the next 12 months? Base: All Respondents n=262



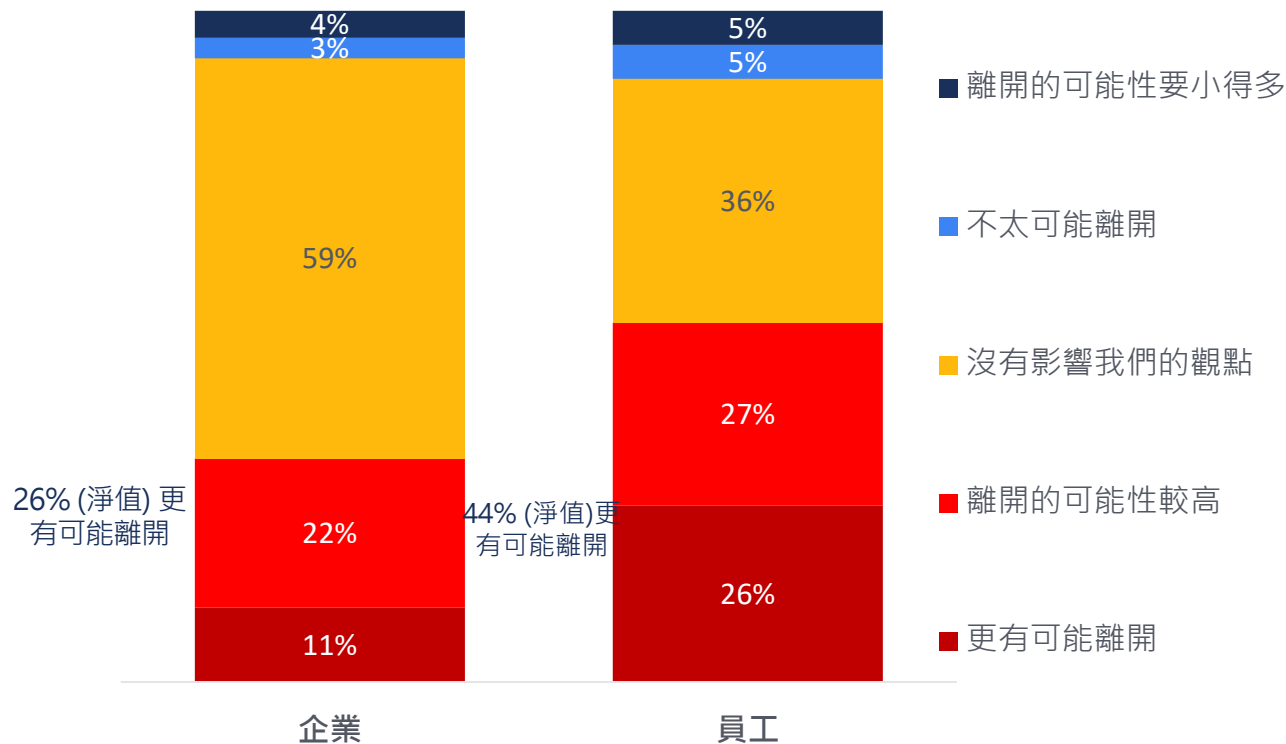
「2019冠狀病毒疫情」對香港作為商業中心的影響

因實施旅遊限制，近一半的企業在香港以外的辦事處受到阻礙。「2019冠狀病毒疫情」帶來的限制使企業和個人更有可能離開香港。

業務受到的影響



「2019冠狀病毒大流行」限制是否影響留在香港的計劃



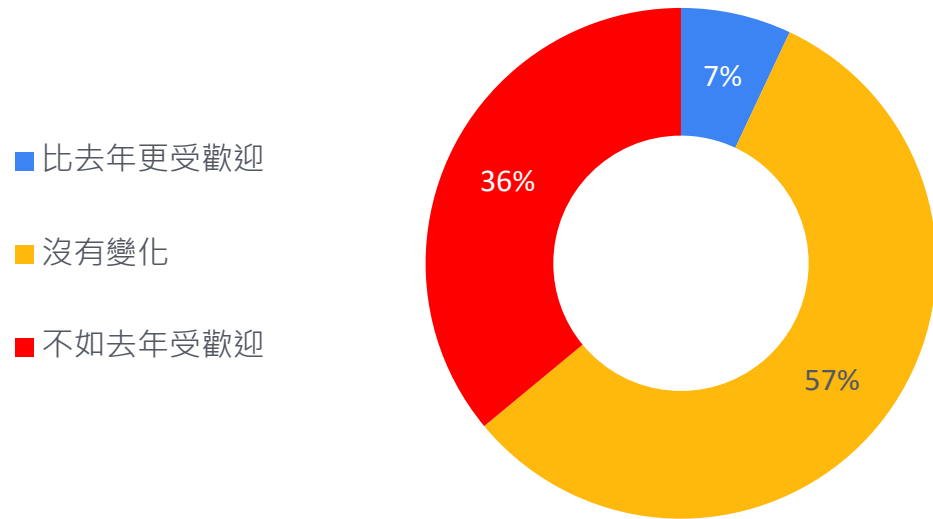
C9. Have Hong Kong's COVID-19 travel and social restrictions changed your company's view on whether to stay in Hong Kong?
 C10. Have Hong Kong's COVID-19 travel and social restrictions changed your personal view on whether to stay in Hong Kong?
 C11. Which of the following is true for your business? Please select up to 3. Base: All Respondents n=262



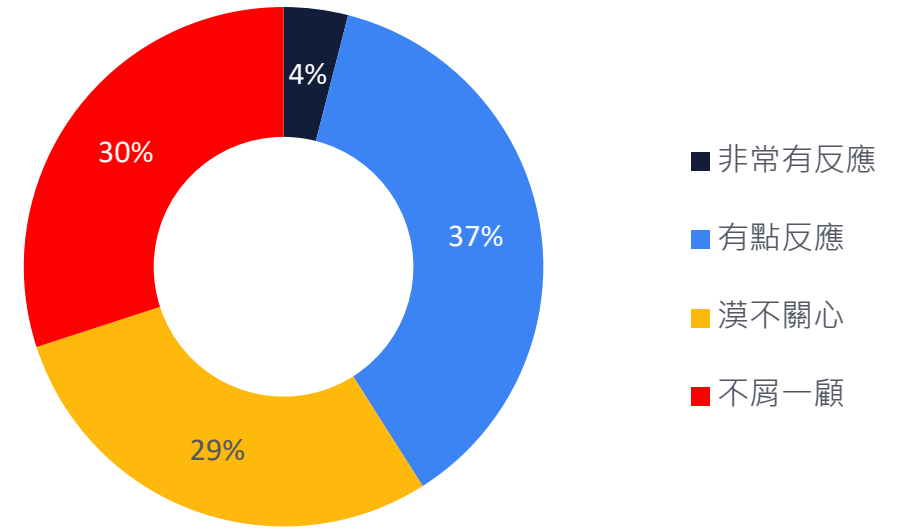
商業環境和香港政府對商業問題的回應

有一種看法認為，外國企業現時在香港不太受歡迎，約六成的受訪者認為香港政府對商業問題漠不關心或不屑一顧。

香港是否歡迎外國企業？



香港政府應對商業問題和機遇的效率



B8. Do you feel foreign businesses are welcomed in Hong Kong?

B10. How well would you rate the Hong Kong government's effectiveness in responding to business concerns and opportunities?

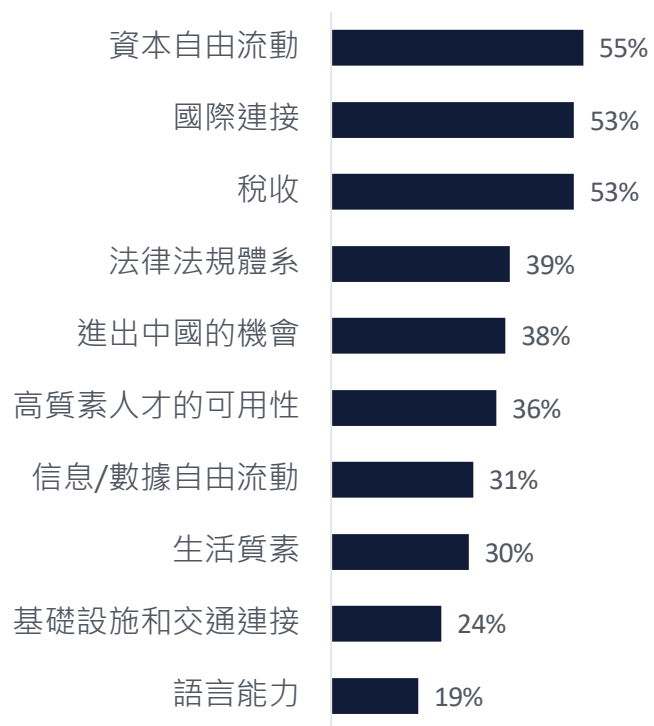
Base: All Respondents n=262



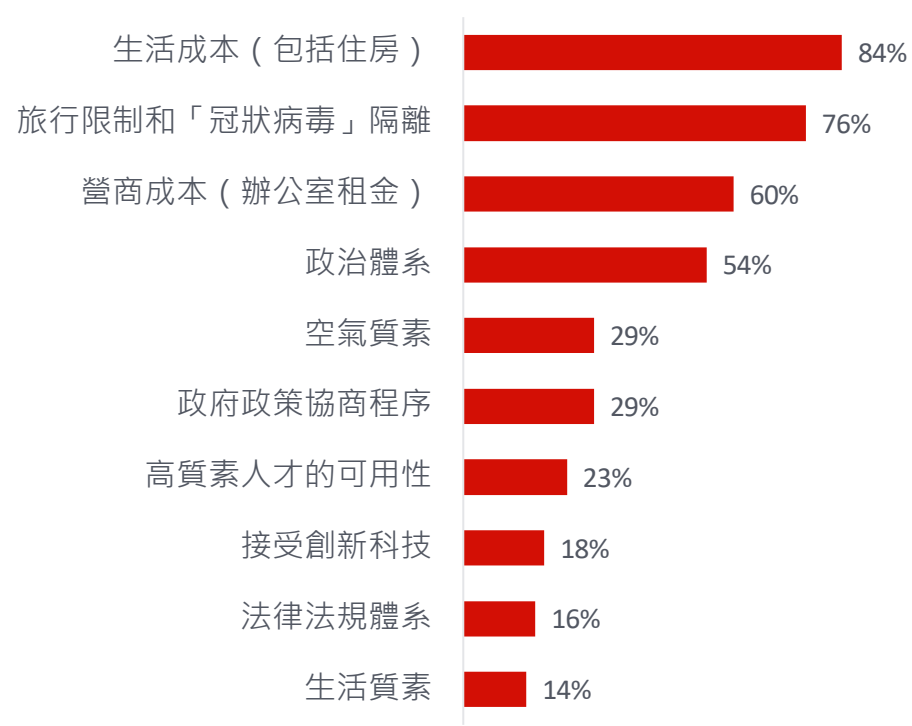
競爭因素

香港的競爭力主要靠資本的自由流動、國際連通性和稅收結構驅動。
高昂的生活成本和旅遊限制是最令人擔憂的問題。

使香港具有競爭力的十大因素



使香港缺乏競爭力的十大因素



C7. From your company's perspective, what are the top factors that make Hong Kong competitive as a business hub? Please choose the top 5.

C8. Looking at the same set of factors, which of these factors make Hong Kong uncompetitive as a business hub? Please choose the top 5.

Base: All Respondents n=262



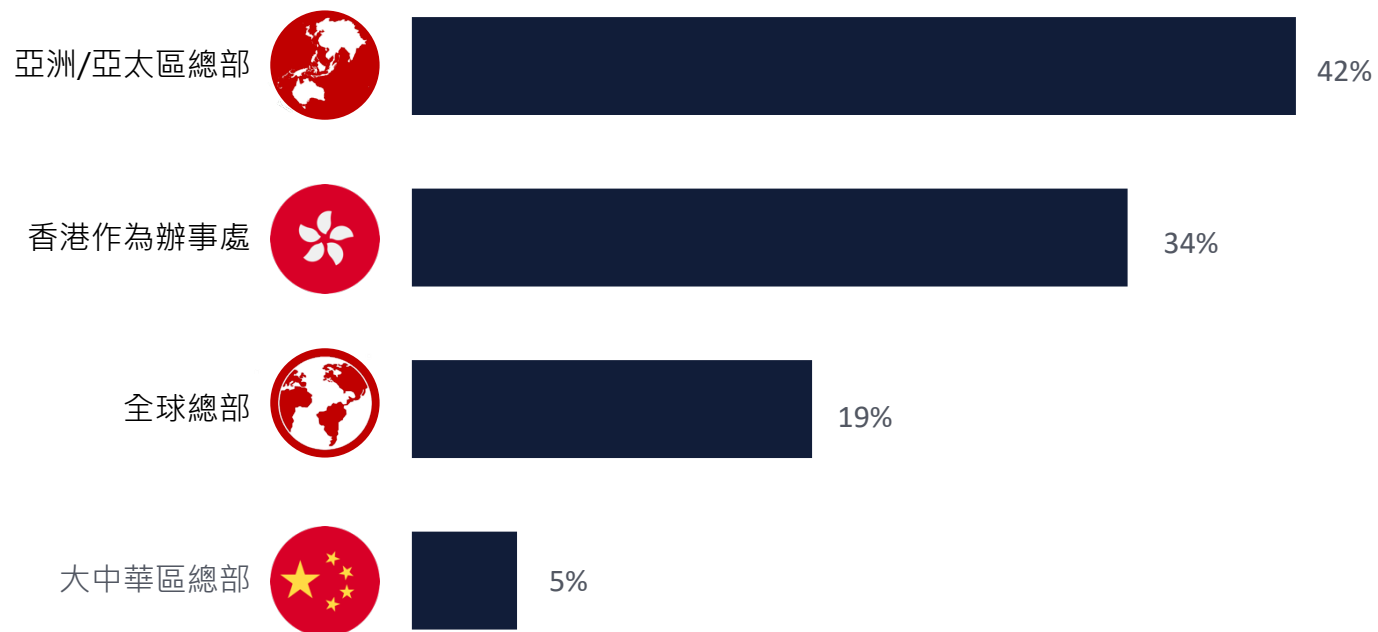
香港作為企業總部



香港辦公室的角色

是 10 家企業中，有 6 家以香港作為全球或地區總部

香港辦公室的角色



C1. What is the role of your Hong Kong office?
Base: All Respondents n=262

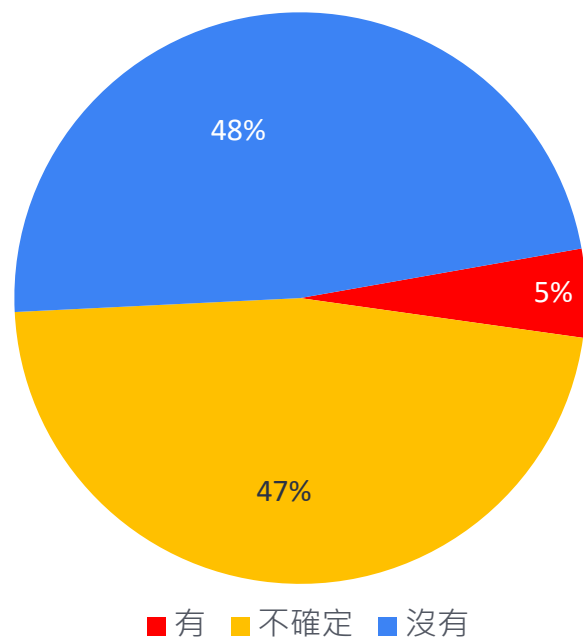


評估未來計劃

雖然只有 5% 的企業明確計劃將總部遷出香港，但仍有一半企業不確定。大多數受訪者認為香港作為全球樞紐具有競爭力。

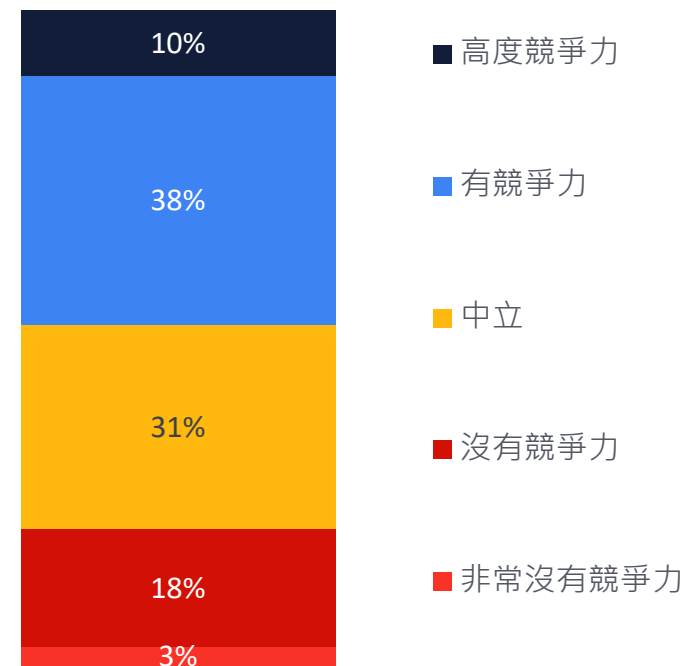
計劃將總部遷離香港？

(其中以香港為總部 n=172)



香港作為國際樞紐的競爭力

+27% (淨值)



C3. Do you plan to move your headquarters away from Hong Kong in the next 3 years?
C5. What is your assessment of Hong Kong's competitiveness as an international business hub in Asia?
Base: All Respondents n=262



對香港的最大威脅

鑑於新加坡的戰略位置和親商方式，成為對香港的最大威脅。



C6. Which city represents the greatest competitive threat to Hong Kong?
Base: All Respondents n=262



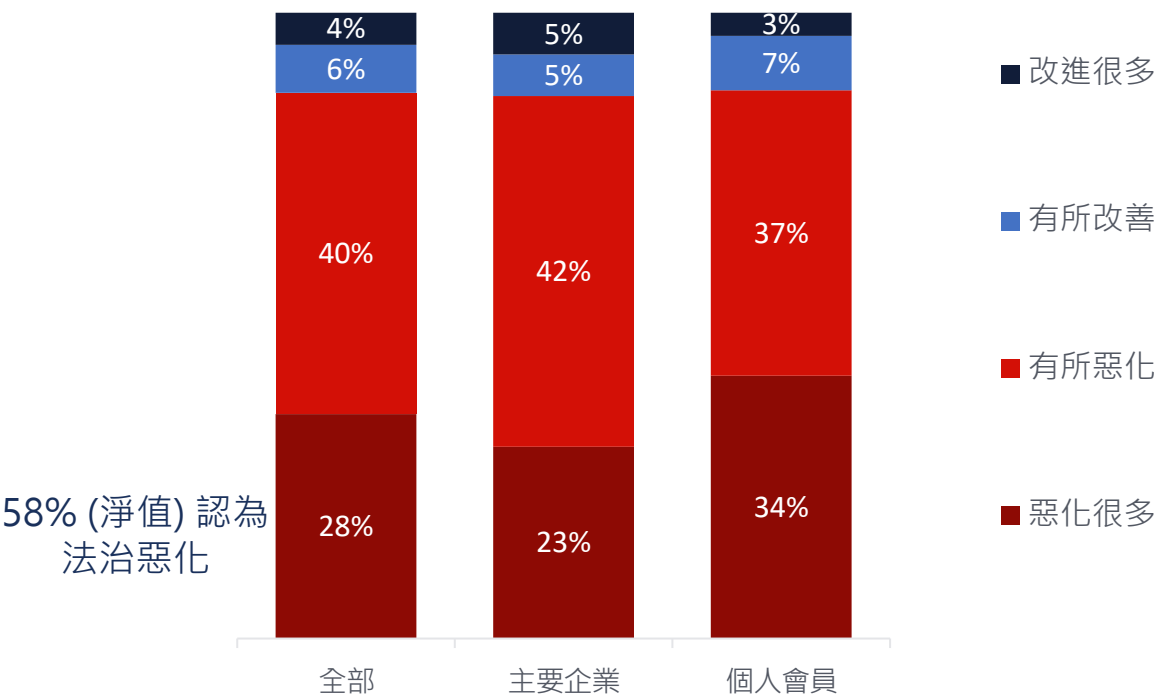
法律與制裁



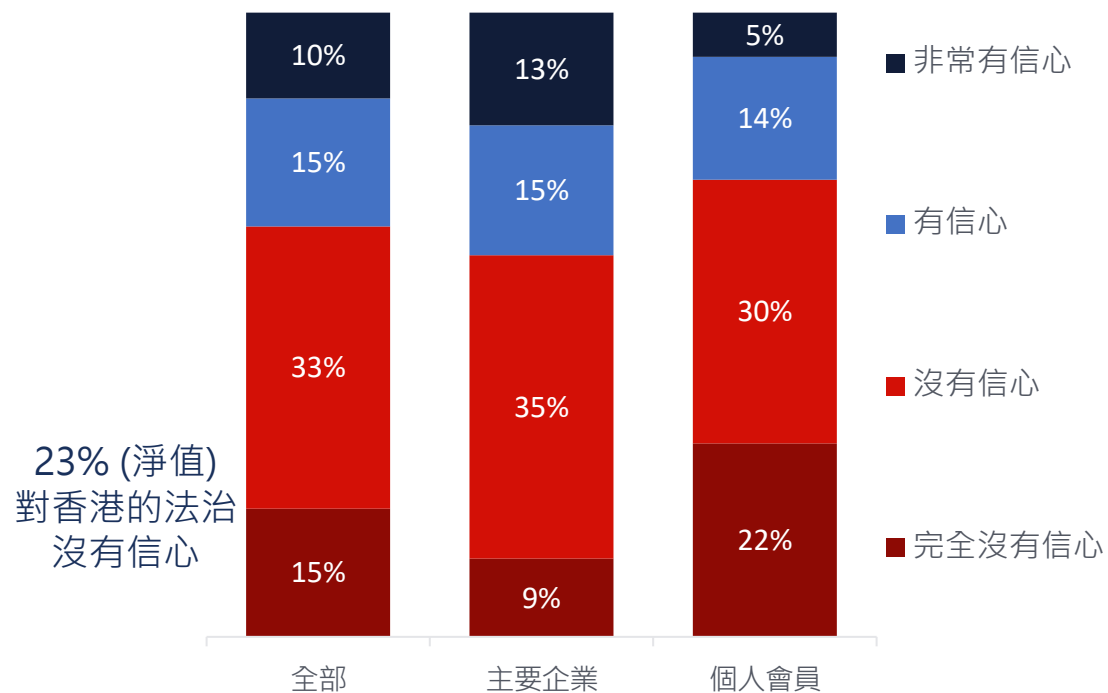
香港法治

68% 受訪者對香港法治的信心在過去一年有所惡化。只有四分之一表示現在對法治有信心。

過去 12 個月對香港法治的信心變化



目前對香港法治的信心



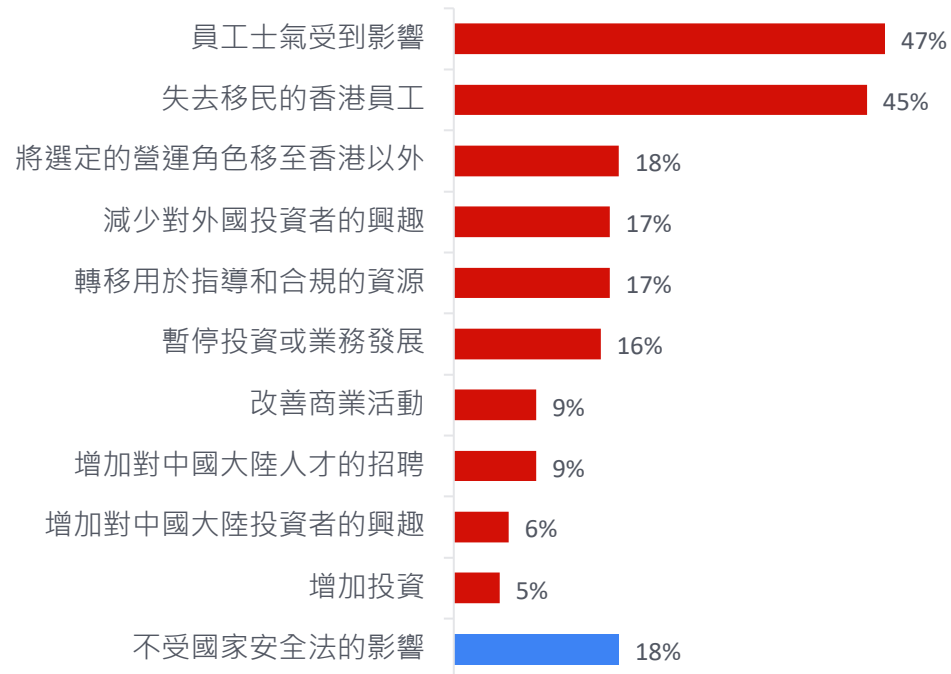
J1. What is your current confidence in the rule of law in Hong Kong?
 J2. How has your confidence in the rule of law in Hong Kong changed over the last 12 months?
 Base: All Respondents n=262



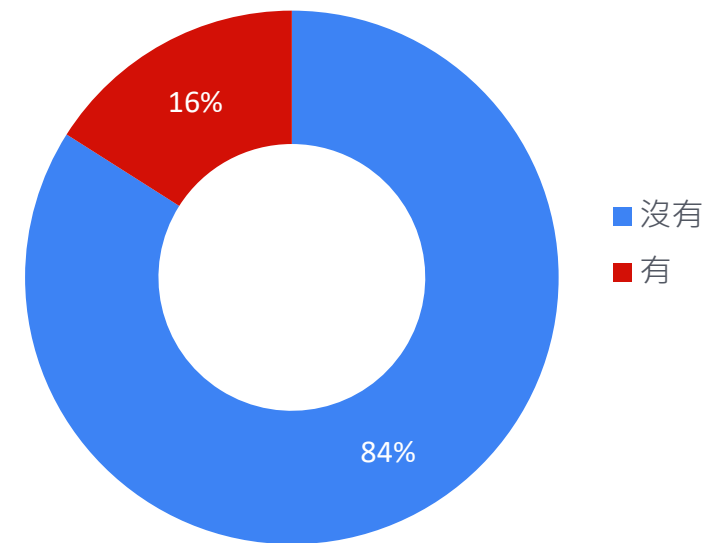
香港《國家安全法》對企業營運的影響

每 10 家企業中就有超過 8 家受到香港《國家安全法》的影響。近一半企業認為員工士氣受到影響，並表示有員工因此移民。有六分之一表示，他們企業的營運有因為香港官員受制裁而受到影響。

香港《國家安全法》對企業營運的影響



制裁香港官員對營運有否影響？



J6. In what ways, if at all, have your company's operations in Hong Kong been impacted by the National Security Law? Please select up to three and rank them from 1 being highest to 3.

J7. Have foreign governments' sanctions on some Hong Kong government officials impacted your company's operations? Base: All Respondents n=262



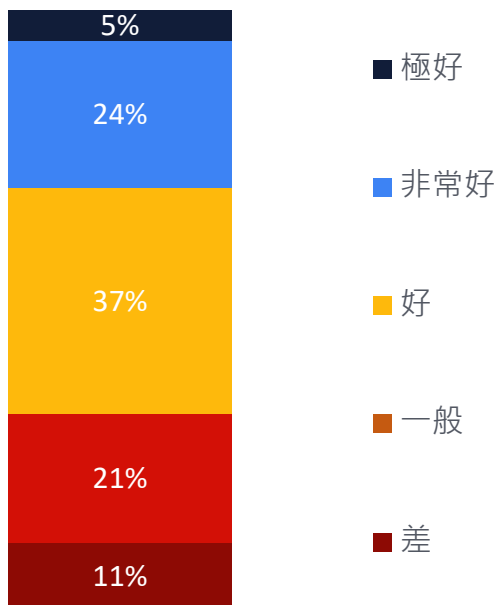
運輸、物流和金融業



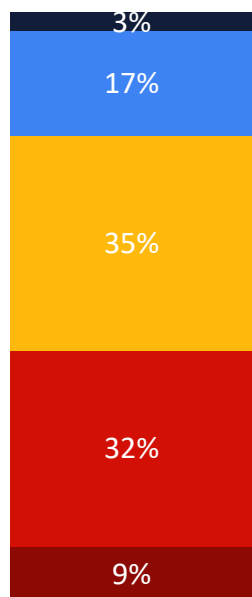
香港運輸及物流業表現

66% 的企業認為香港在運輸及物流業的表現為良好至優秀。

過去 12 個月的評估

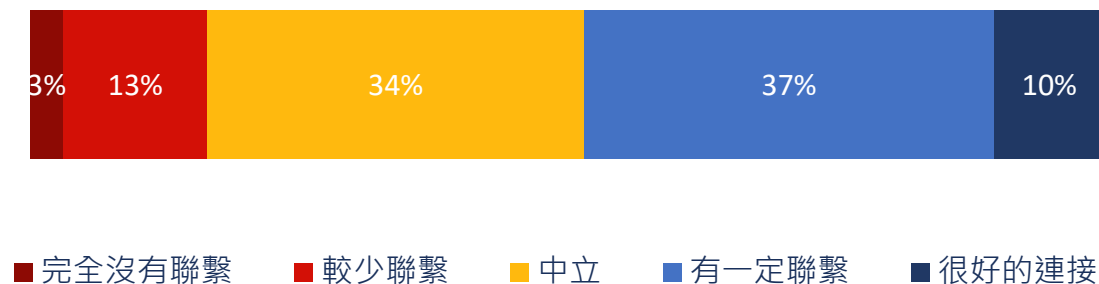


智能交通評估



香港與大灣區其他地區有多大的聯繫？

+31% (淨值)



E1. What is your/your company's assessment of the Hong Kong transportation and logistics industry's performance in the past 12 months?

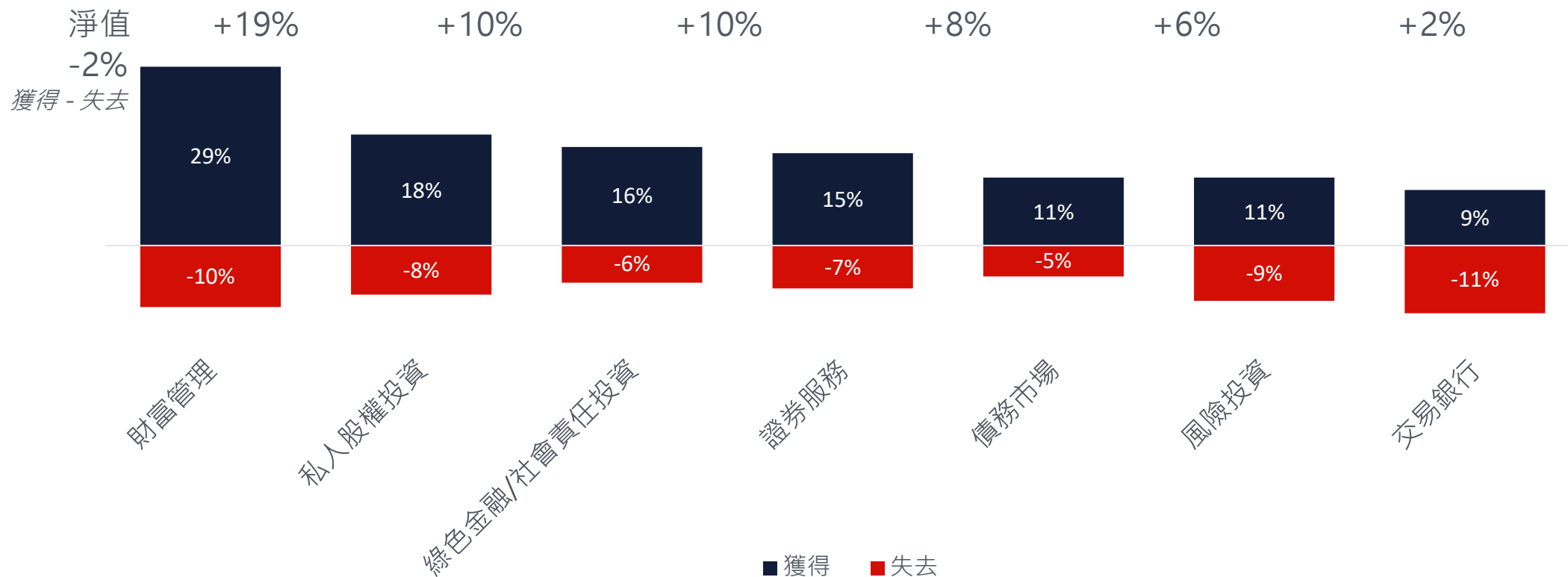
E2. What is your assessment of the use of smart transportation (modern technology and management strategies) to improve transportation and logistics in Hong Kong?

E3. In your opinion, how well connected is Hong Kong with the rest of the GBA in terms of transportation and logistics? Base: All Respondents n=262



金融服務 – 獲得/失去的區域競爭力

企業普遍認為金融服務業的競爭力強勁及有所增強，尤其是在財富管理方面。



H1. In which of these areas of financial services has Hong Kong gained regional competitiveness in the past three years?

H2. In which of these areas of financial services has Hong Kong lost regional competitiveness in the past three years?

Base: All Respondents n=262



招聘前景



招聘計劃和挑戰

企業計劃在明年增加員工人數，但 40% 的企業表示香港合資格的員工人數減少。

未來 12 個月的招聘計劃

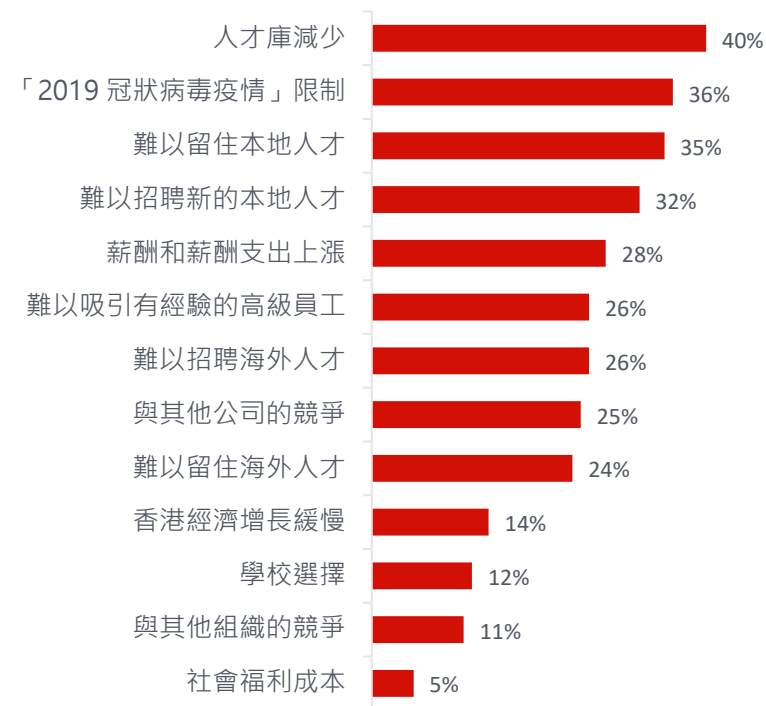


過去 12 個月香港可供聘用的合資格員工

46% 表示可供聘用的合資格員工減少



招聘過程中面臨的挑戰



G1. What are your expected hiring plans over the next 12 months?

G2. What is your assessment of the availability of qualified staff in Hong Kong in the past 12 months?

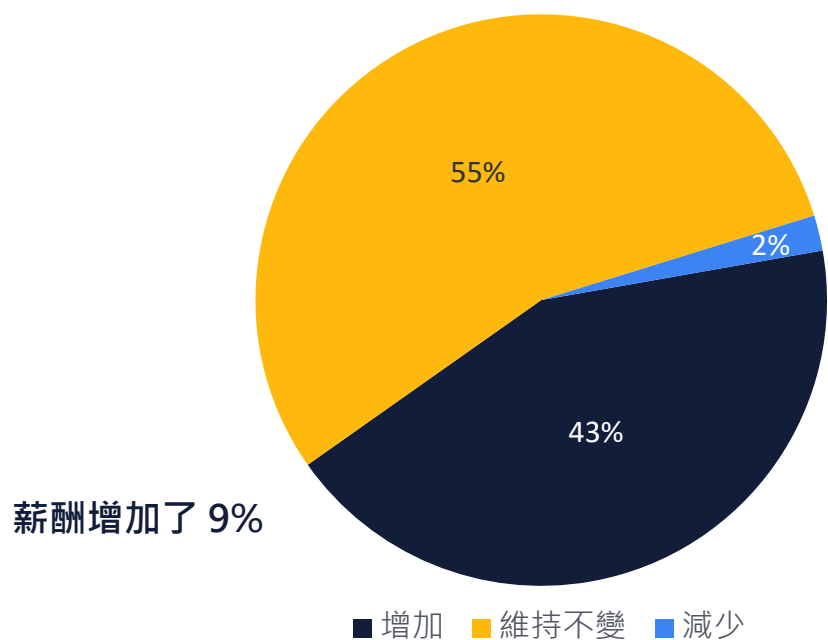
G3. Please select your top three human resource challenges and rank them from 1 being highest to 3. Base: All Respondents n=262



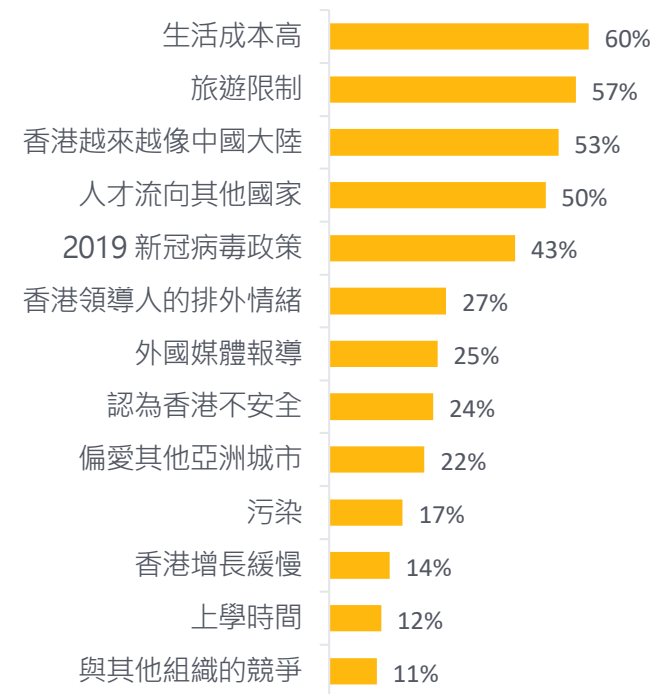
薪酬和僱用外國人才

43% 受訪者表示僱用員工的成本增加。生活成本高企、旅遊限制，以及香港失去獨特性等等令招聘外國人才成爲一項挑戰。

僱用員工成本的變化



招聘/留住外國人才的挑戰



G4. Which of the following factors is a significant challenge to your organization's ability to recruit and retain foreign talent to work in Hong Kong. Please select all that apply.

G5. How has the cost of paying employees changed in the past 12 months for your company?

G6. If answered "Increased" in previous question, by what % did it increase? If answered "Decreased" in previous question, by what % did it decrease? Base: All Respondents n=262



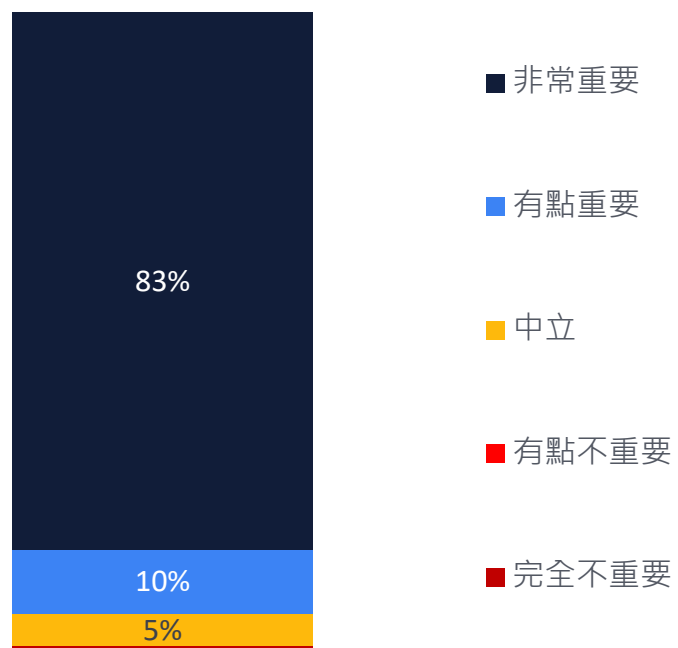
數據自由與技術



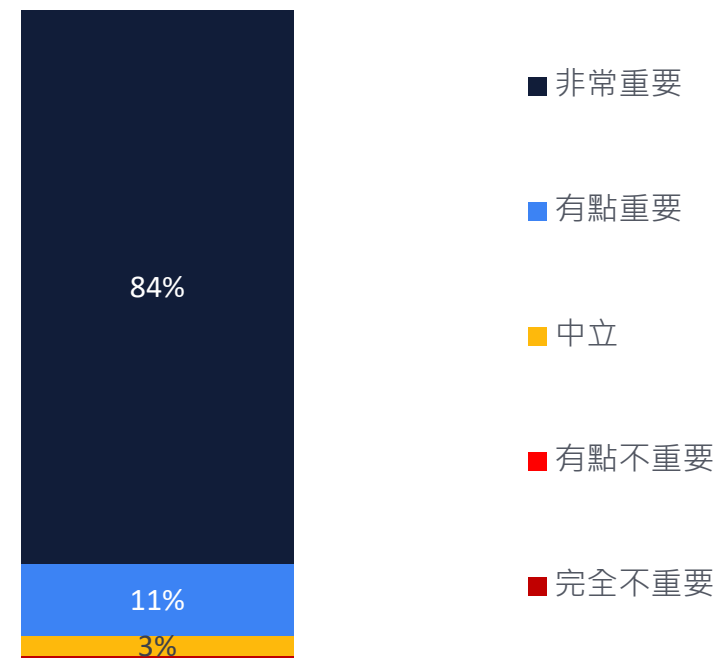
訪問互聯網和信息平台

企業普遍認為能自由瀏覽互聯網和信息平台很重要。

自由瀏覽互聯網和信息對企業營運的重要性



自由瀏覽互聯網和信息對個人的重要性



F6. How important is free access to global internet and information platforms (e.g. Google, Facebook, Bloomberg) to your company's operations in Hong Kong?

F7. How important is free access to global internet and information platforms (e.g. Google, Facebook, Bloomberg) to your personal life in Hong Kong?

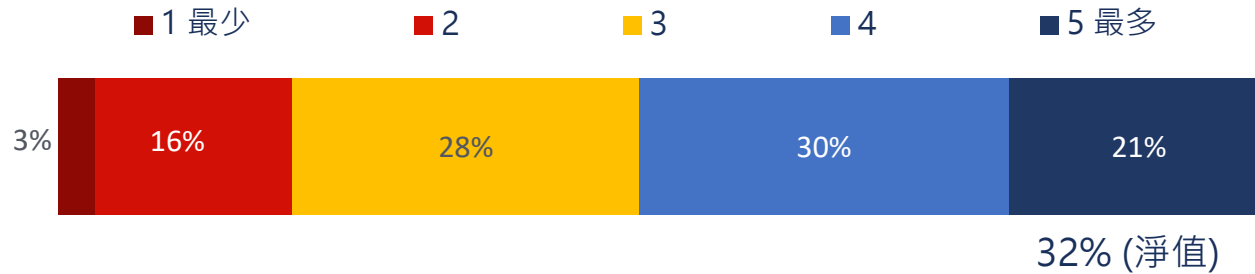
Base: All Respondents n=262



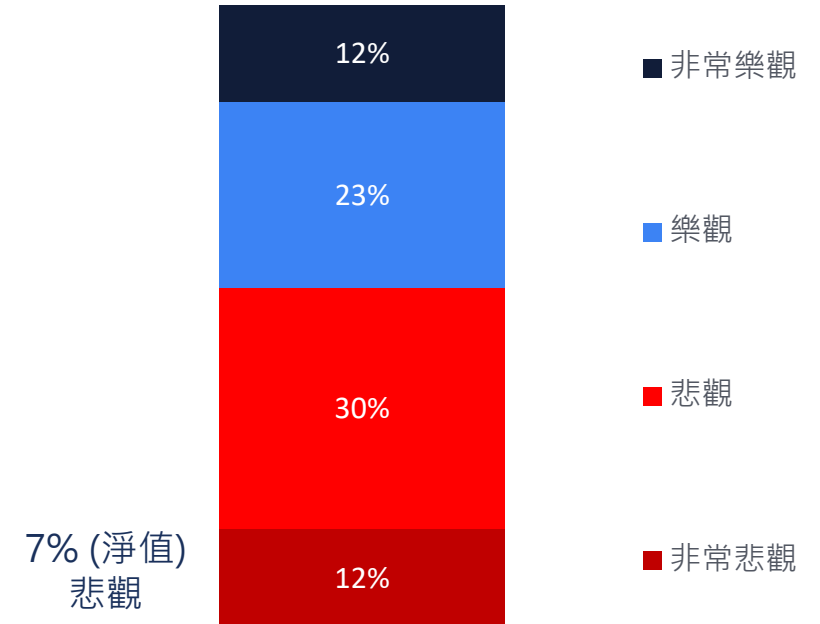
目前和未來對互聯網和信息平台的瀏覽

42% 受訪者認為未來可能無法繼續自由瀏覽互聯網。

香港的數據自由



對於未來3年能否繼續自由使用全球 互聯網和信息平台的看法



F1. On a scale of 1-5 (1 being least and 5 being most), how happy are you with the data freedom in Hong Kong?

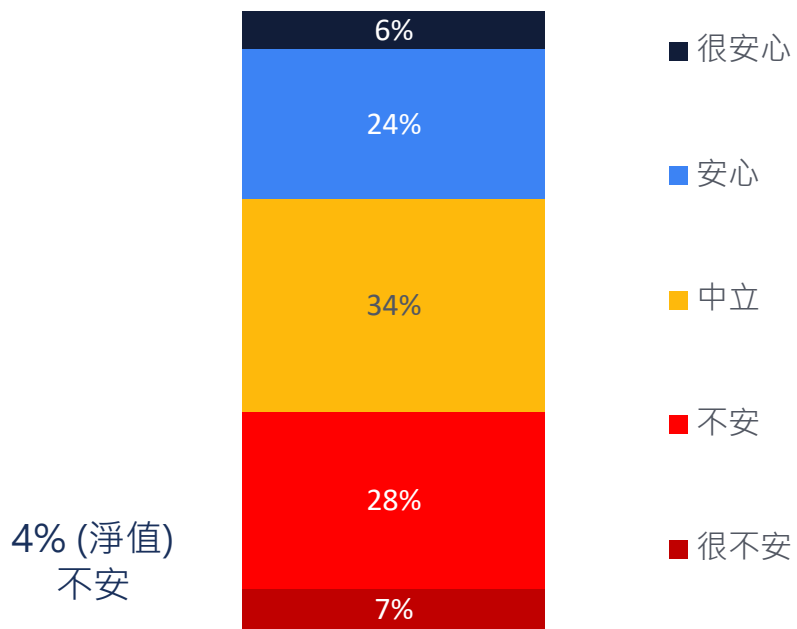
F8. What is your expectation for Hong Kong to continue to have free access (without government censorship and/or firewall) to global internet and information platforms (e.g. Google, Facebook, Bloomberg) in the next 3 years? Base: All Respondents n=262



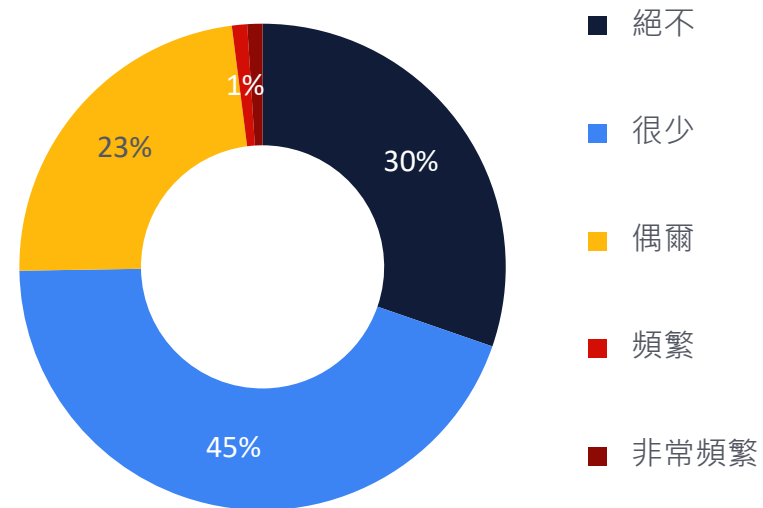
數據私隱

三分一的企業對目前的數據私隱法規水平感到不安。

對於數據隱私保護法規的安心程度



線上獲取數據時遇到困難



F2. How often do you or your businesses encounter difficulties in terms of accessing data (e.g. news, information, website) online in Hong Kong?

F4. How comfortable are you with the regulation of data privacy protection in Hong Kong currently?

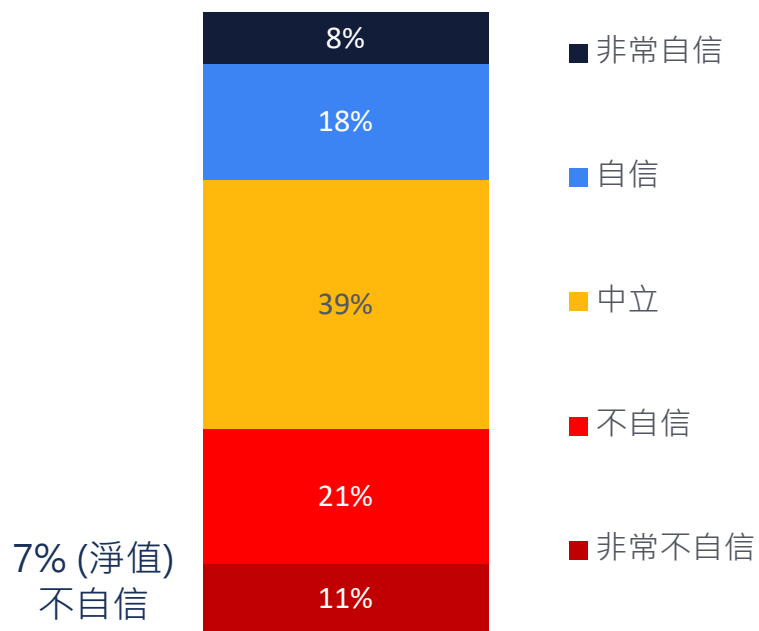
Base: All Respondents n=262



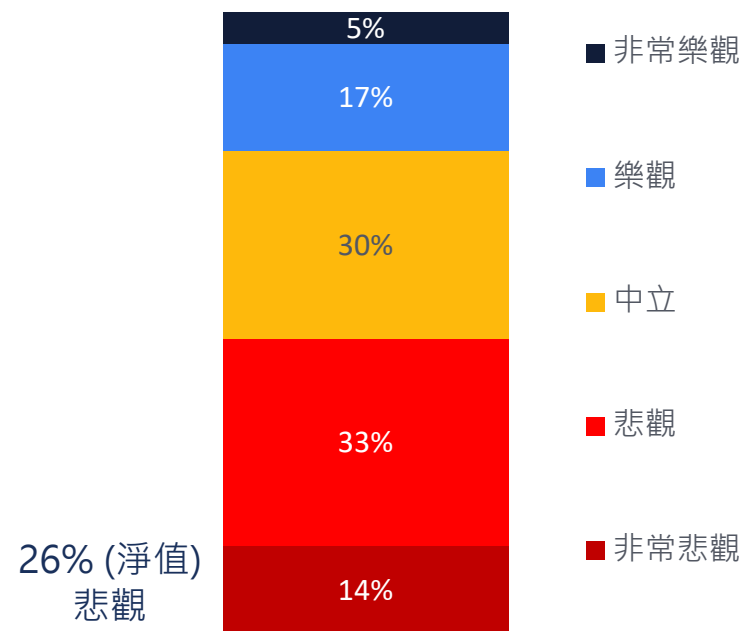
香港作為數據中心

雖然現時只有三分一的受訪者對在本地存儲客戶和公司數據沒有信心，但 47% 的受訪者對香港作為區域數據中心方面感到悲觀。

在香港本地儲存客戶和公司數據的信心程度



香港作為區域數據中心的未來



F3. What is your personal outlook on Hong Kong's future as a regional data center?

F5. How confident are you of storing your company and customer's data locally in Hong Kong or establishing data centres in Hong Kong?

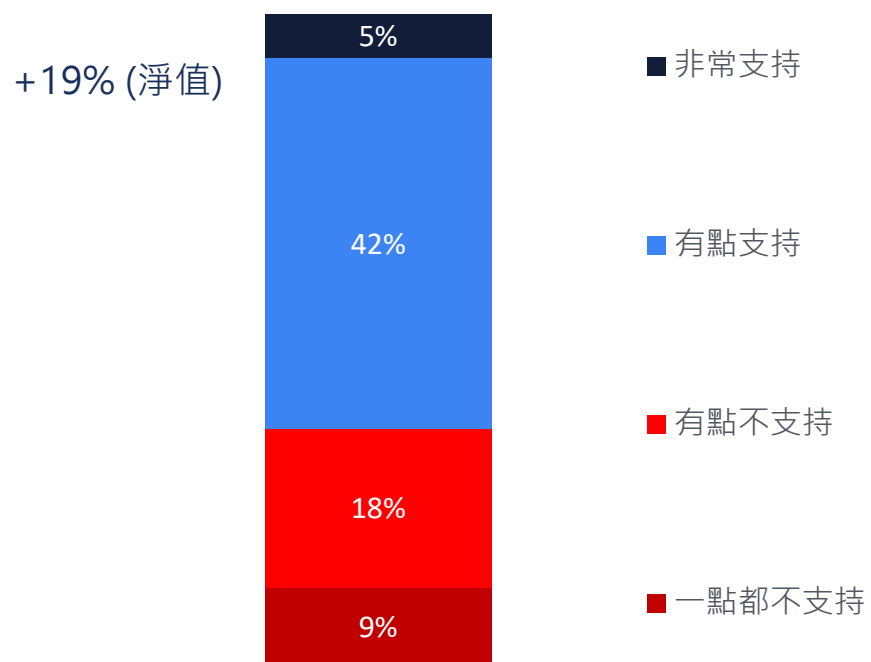
Base: All Respondents n=262



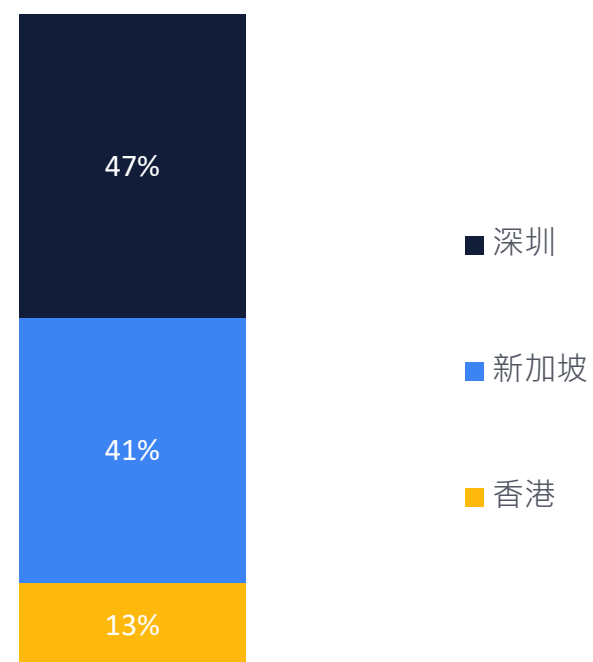
香港政府支持研發

一半受訪者認為政府支持創新研發，但認為深圳和新加坡是更好的研發場所。

香港政府支持研發程度



最佳研發地點



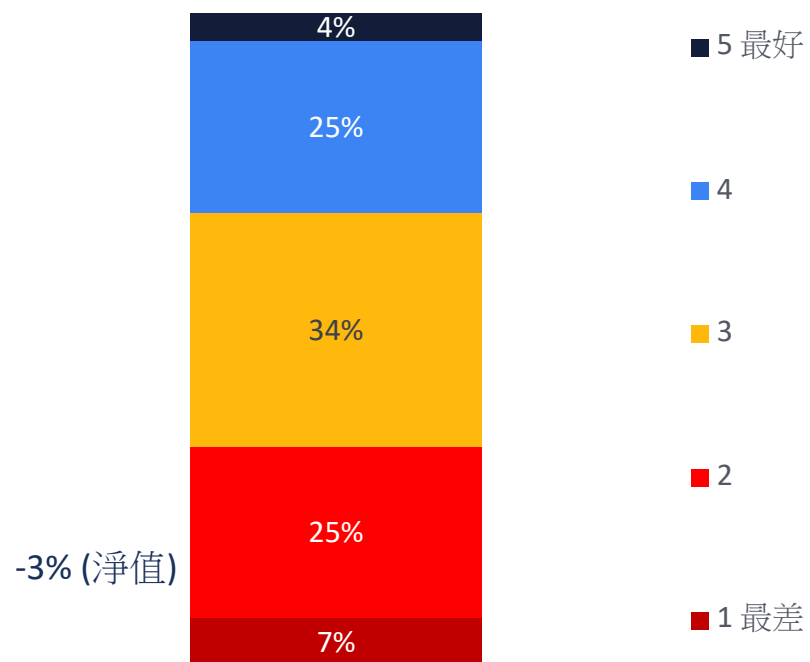
F9. Which of the following places, in your mind, is better suited for R&D innovation? Please rank them from 1 being highest to 3 being lowest.
F10. How well do you think the Hong Kong government supports research and development of innovation and technology in Hong Kong?
Base: All Respondents n=262



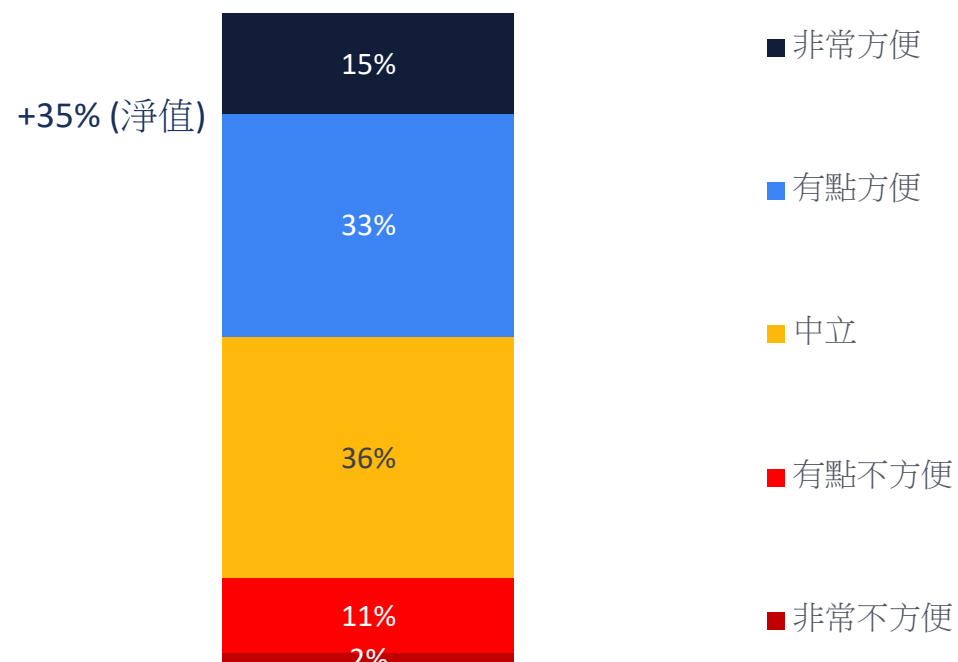
香港作為初創企業、風險投資融資的地方

市場上有足夠的資金用於新企業，但企業並不認為香港是創業的好地方。

香港作為企業家創辦初創企業的地方



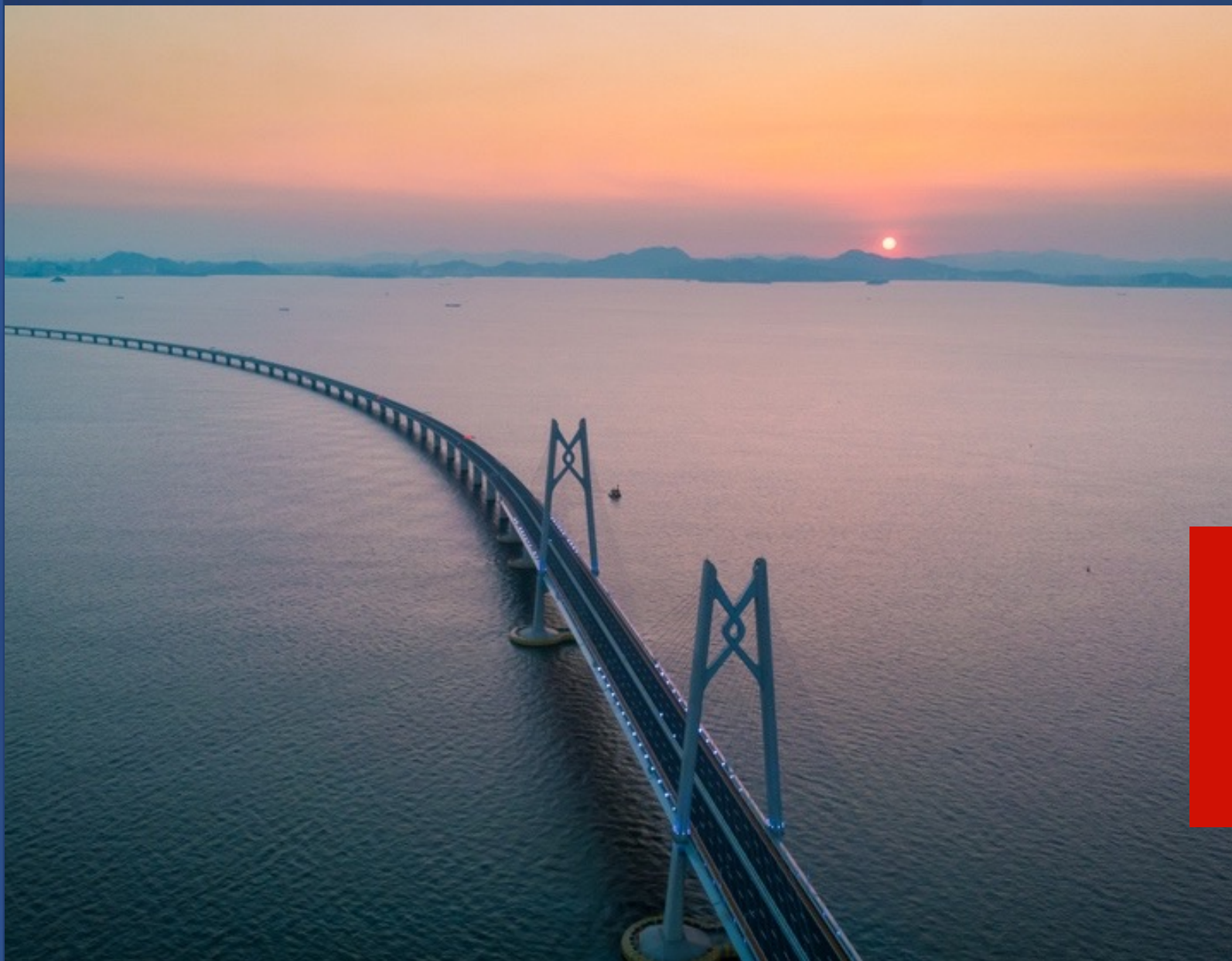
香港作為創業者的風險投資融資的地方



F11. On a scale of 1-5 (1 being worst and 5 being best), how do you assess Hong Kong as a place for entrepreneurs to create start-ups?

F12. In your opinion, how accessible is securing venture capital funding for entrepreneurs in Hong Kong?

Base: All Respondents n=262

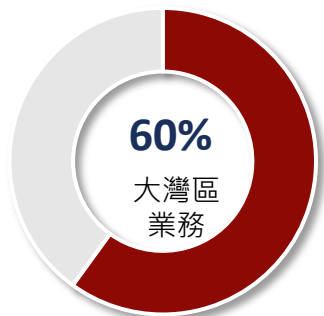


大灣區



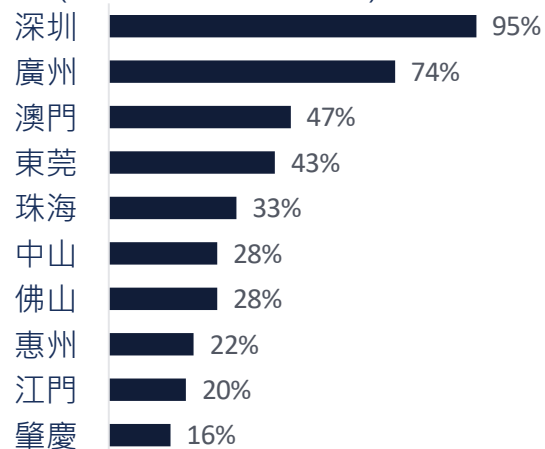
在大灣區的營運

60% 的業務已經在大灣區營運，其中深圳和廣州是最受歡迎。四成的企業計劃在未來幾年擴大其大灣區的業務。

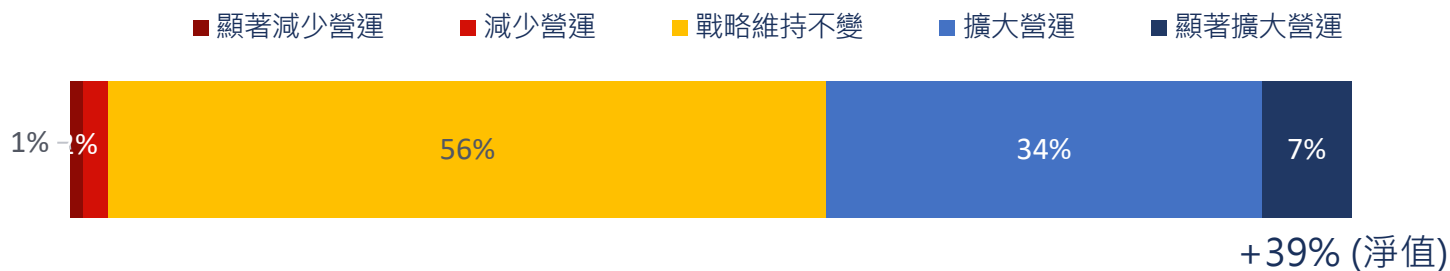


城市

(在大灣區有業務的 n=158)



未來 3 年大灣區的擴張



未來 3 年大灣區的商機的信心



D1. Does your company currently conduct business in the Greater Bay Area (GBA), excluding Hong Kong?

D2. Please select the cities in which your company currently conducts business.

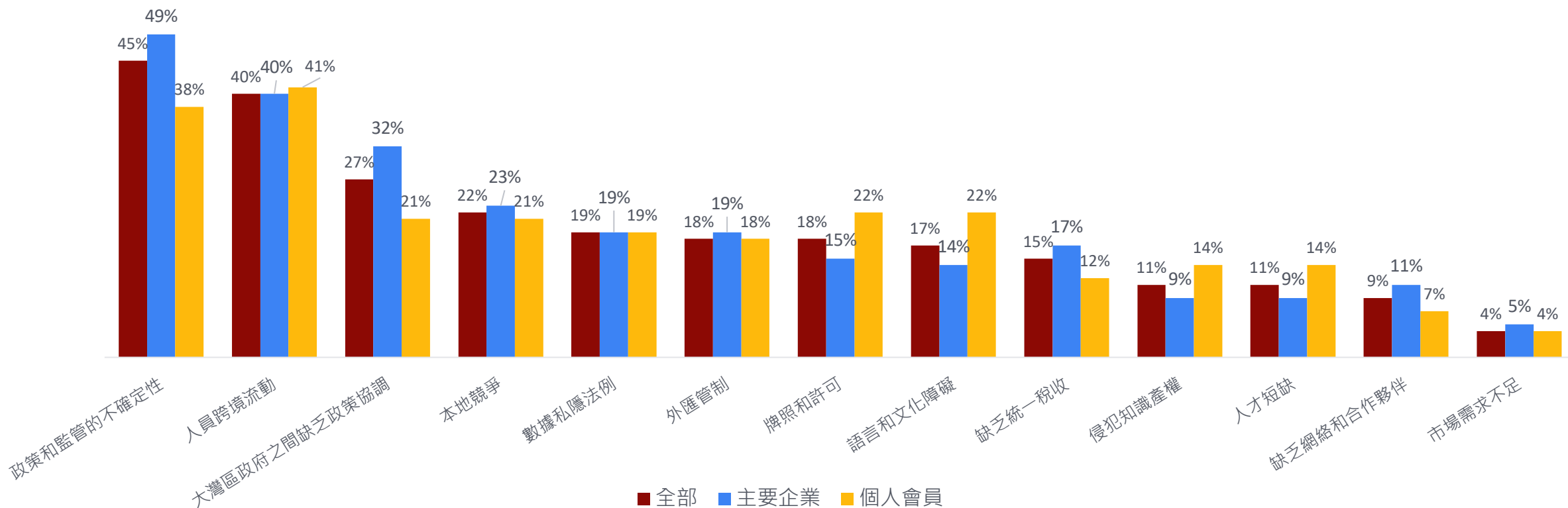
D3. Does your company plan to expand its operations in the Greater Bay Area in the next 3 years?

D5. What is your/your company's expectation of the Greater Bay Area's business opportunities in the next 3 years? Base: All Respondents n=262



大灣區內部的挑戰

政策和決策的不確定性，以及人員跨境流動是最大的挑戰。

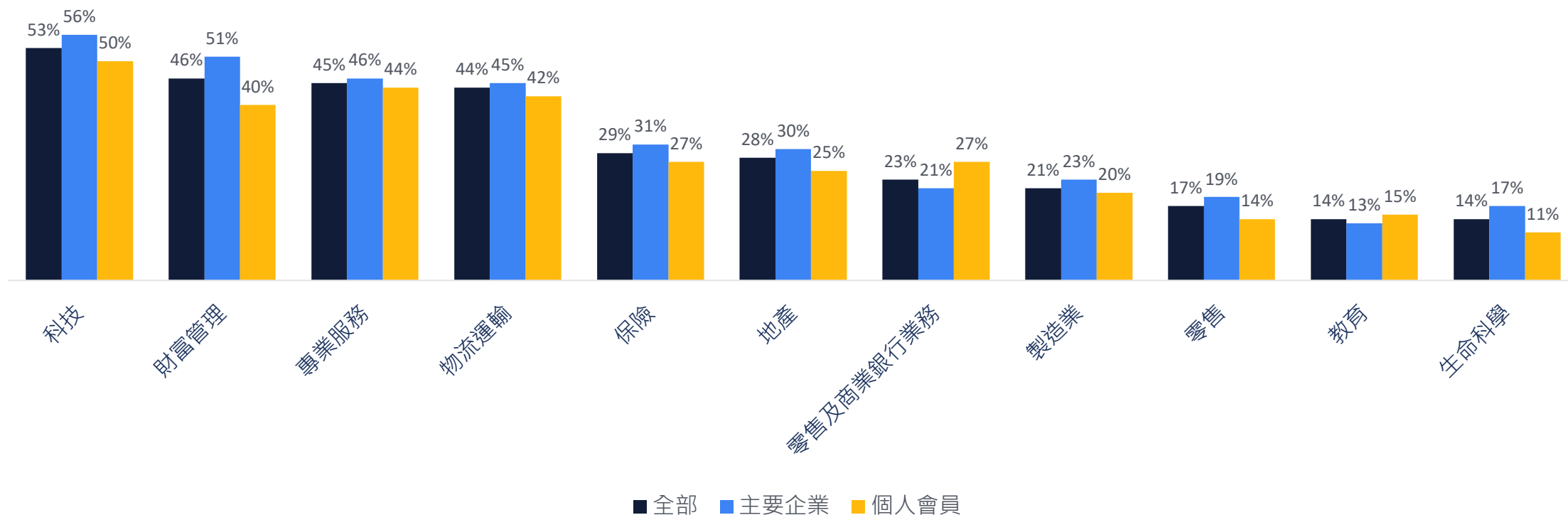


D9. Please select the top three challenges in doing business in the GBA and rank them from 1 being highest to 3.
Base: All Respondents n=179, Key Corporate n=106, Individual members n=73



受益於大灣區發展的行業

大多數行業都受益於大灣區的發展。其中，資訊科技受益最大。



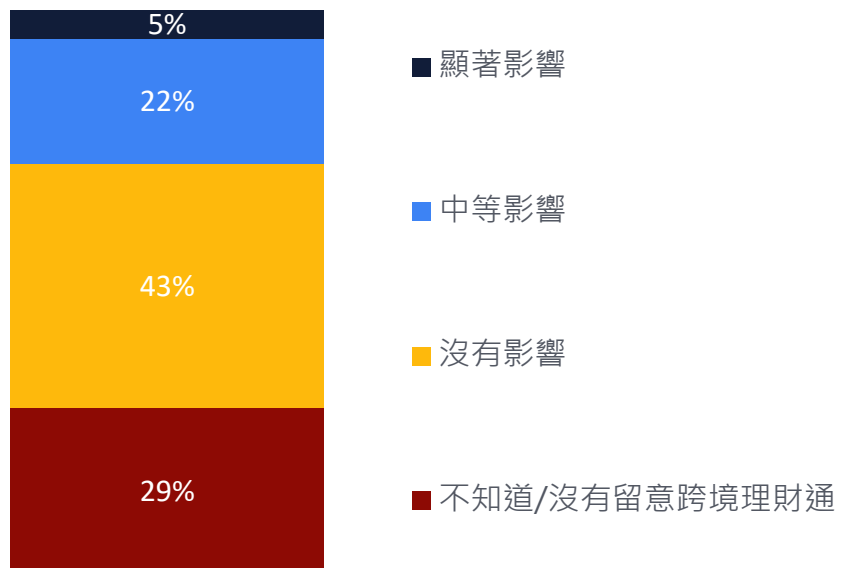
D6. Which Hong Kong industries will benefit most from the GBA's development?
Base: All Respondents n=262, Key Corporate n=151, Individual members n=111



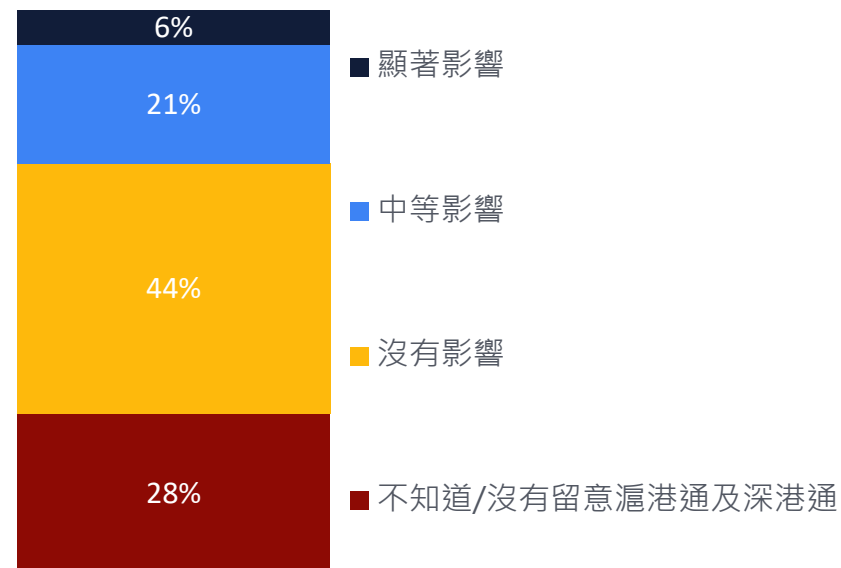
跨境理財通、滬港通及深港通的影響

跨境理財通、滬港通及深港通預計將對香港四分一的業務收入產生影響。

跨境理財通對未來 3 年收入的影響



滬港通及深港通對未來三年收入的影響



D7. What is the expected impact of Wealth Management Connect on your Hong Kong revenues over the next three years?

D8. What is the expected impact of StockConnect on your Hong Kong revenues over the next three years?

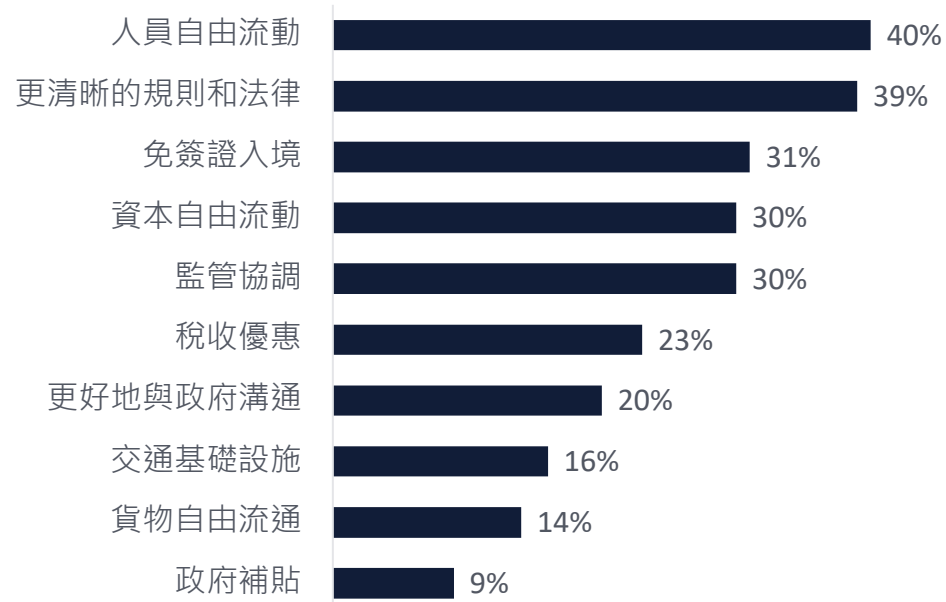
Base: All Respondents n=262



機遇和利益

人員自由流動以及更清晰的規則和法律最能促進大灣區機遇。

支持大灣區機遇的因素



在大灣區開展或計劃開展業務的受訪者中 n=179

大灣區創新和科技行業的優勢

我們幫助大灣區企業出口到國外市場	13%
我們在中國大陸大灣區設有創新和/或研發中心	10%
我們從中國大陸大灣區聘請技術人才	10%
我們在中國大陸大灣區設計原型和/或製造產品	9%
我們使用中國大陸大灣區公司來創建我們的技術解決方案	8%
我們與中國大陸大灣區的初創企業建立了合作夥伴關係	6%
以上皆非	65%

D10. Please select the top three factors that would support your GBA opportunities and rank them from 1 being highest to 3.

D11. Please select below how your company benefits from the mainland GBA's innovation & technology sectors.

Base: All Respondents n=262

