

2023 China Business Climate Survey Report
2023年度中国商务环境调查报告

Education Industry Report 教育行业报告

This report distills industry-specific data from the full 2023 BCS Report reflects specific industry's business climate. We hope this report is helpful for our members to measure their operations and compare business outlooks and strategies with their industry and the broader foreign business community.

We want to thank all our members who took the time to participate in the survey. Your input is greatly valued and the key to our joint success.

**All data in this report was rounded to the nearest whole number. Therefore, some charts or graphs may not equal 100 percent.
 **Some response options and categories in the BCS have changed over time to address current market realities.*

- Executive Summary
- Financial Performance
- Investment Plan
- Two-Year Business Outlook
- Top three business challenges and opportunities

Education Sector Executive Summary

- In 2022, Education sector members saw a more pessimistic financial performance. 79% of the sector members said they would not be profitable, and 75% of them estimated the 2022 revenue would break even or lose.
- Only 11% of the sector members reported that China's investment environment quality is improving.
- Less than half of the sector members (47%) said China is their first or top three near-term investment destinations.
- Across all the seven aspects of business operation in China, the pessimistic views stick with the Education sector members. This was most profoundly seen in response to the regulatory environment (68%), economic recovery (68%), and US-China relations (60%).
- 36% of the sector members reported that a shortage of qualified employees is among their top three business challenges.
- Increasing consumer demand for foreign brands/quality was among the sector members' top three business opportunities in China (36%).

本报告从2023年度BCS报告全文中摘取了教育行业的数据，以反映具体的行业商务环境情况。我们希望本报告能成为会员公司在其具体行业乃至更广泛的外资企业中，衡量业务、比较商业前景与策略的实用工具。

中国美国商会向所有参与此次调查问卷的会员机构致以诚挚的谢意。您的贡献是我们共同成功的关键。

*本报告中的所有数据由于四舍五入至最接近的整数分图表或图像的数据总和可能不等于总额（100%）

**商务环境调查中的部分回答选项和类别会因反映当前市场情况而有所改变

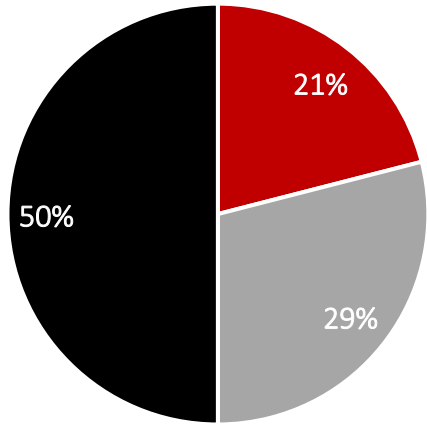
- 摘要
- 营收状况
- 在华投资计划
- 今后两年中国业务展望
- 在华运营前三大挑战和机遇

教育行业概述

- 2022年，教育行业受访会员企业对其营收状况呈现悲观态势。79%的该行业会员企业表示将会亏损；75%的企业预计其年度营收状况基本持平或亏损。仅11%的该行业会员企业认为中国的投资环境质量有所改善。
- 不到一半的该行业会员企业（47%）仍将中国列为首要或前三大短期投资目的地。
- 从在华运营的七个具体方面来看，教育行业会员企业保持着整体悲观的情绪。其中最为显著体现在监管环境（68%）、经济复苏（68%）和中美关系（60%）这三个方面。
- 有36%的该行业会员企业指出“缺少合格的员工”是它们在华运营的前三大商业挑战之一。
- “消费者对外国品牌/质量日益增长的需求”（36%）是教育行业会员企业在华运营的前三大商业机遇之一。

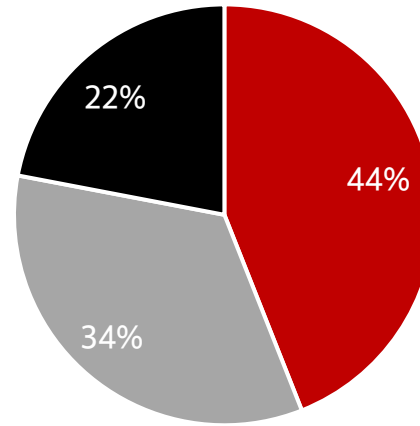
Financial Performance

Education Sector



■ Profitable ■ Break even ■ Loss

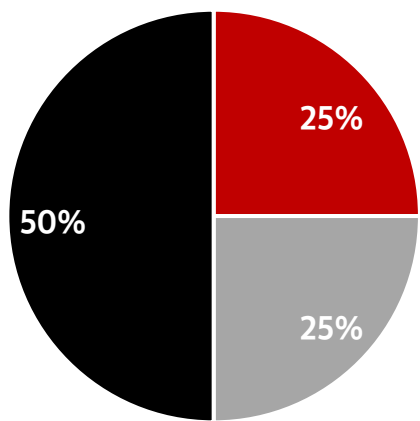
All respondents



■ Profitable ■ Break even ■ Loss

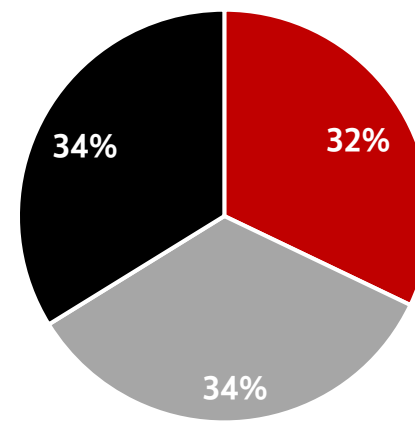
Estimated Revenue

Education Sector



■ Up ■ Comparable(± < 2%) ■ Down

All respondents

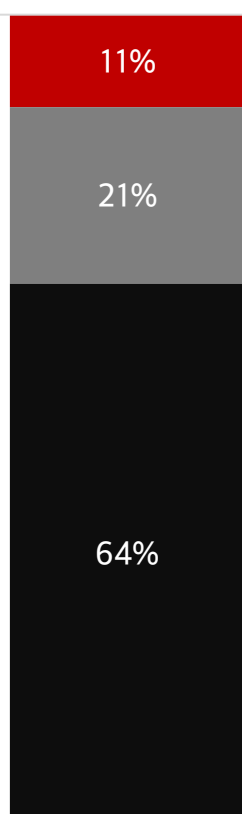


■ Up ■ Comparable(± < 2%) ■ Down

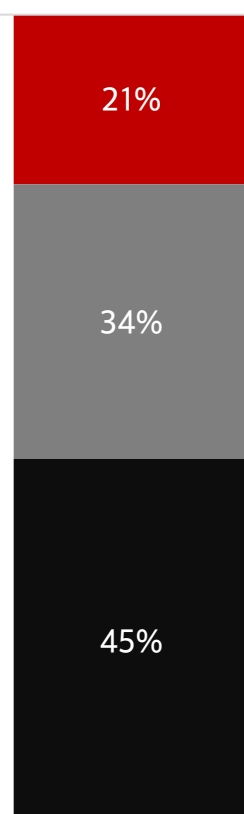
Investment Plan

China Investment environment quality

Education



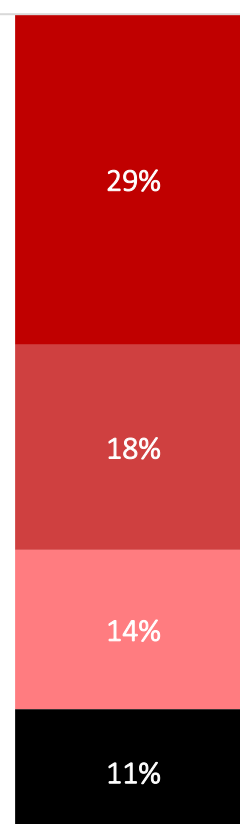
All



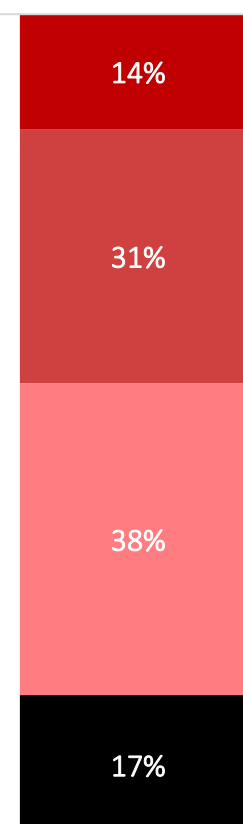
■ Improving ■ Staying the same ■ Deteriorating

China ranks of near-term global investment destination

Education



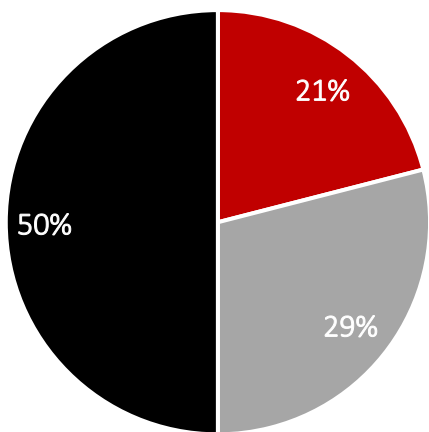
All



■ First priority ■ Top three priority
 ■ One among many destinations ■ Not a high priority

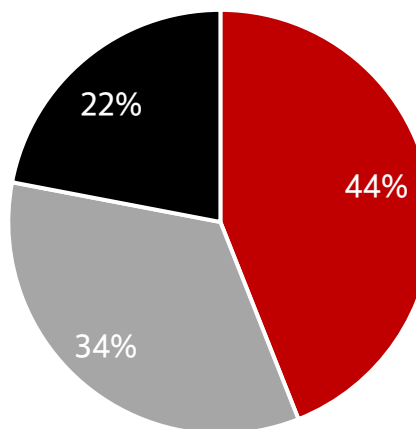
财务状况

教育行业



■ 盈利 ■ 持平 ■ 亏损

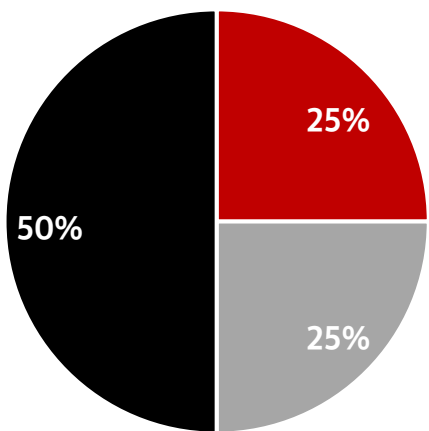
所有受访者



■ 盈利 ■ 持平 ■ 亏损

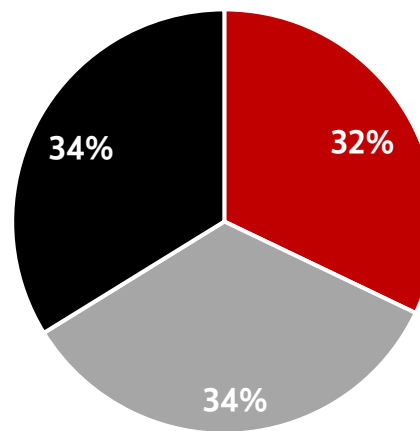
预期营收

教育行业



■ 上升 ■ 持平(± < 2%) ■ 下降

所有受访者

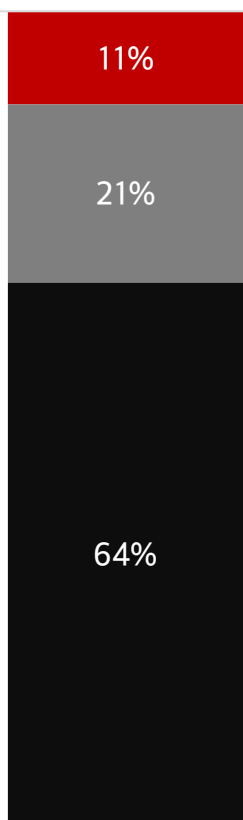


■ 上升 ■ 持平(± < 2%) ■ 下降

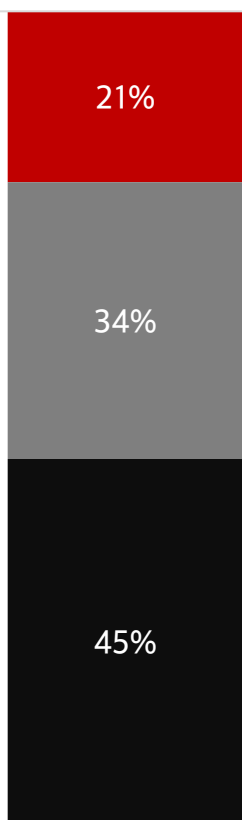
投资计划

中国投资环境质量

教育行业



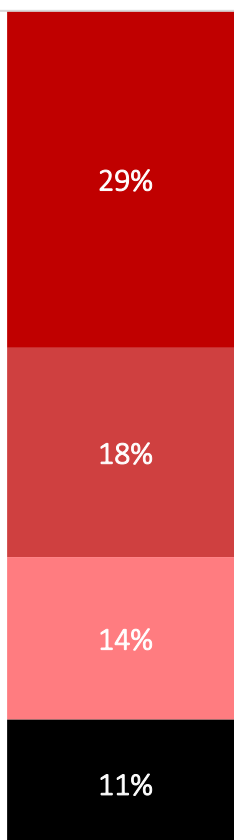
所有受访者



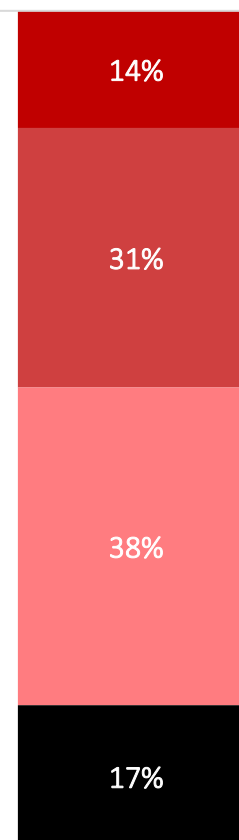
■ 有所改善 ■ 维持不变 ■ 有所恶化

中国在全球短期投资目的地中的排名

教育行业

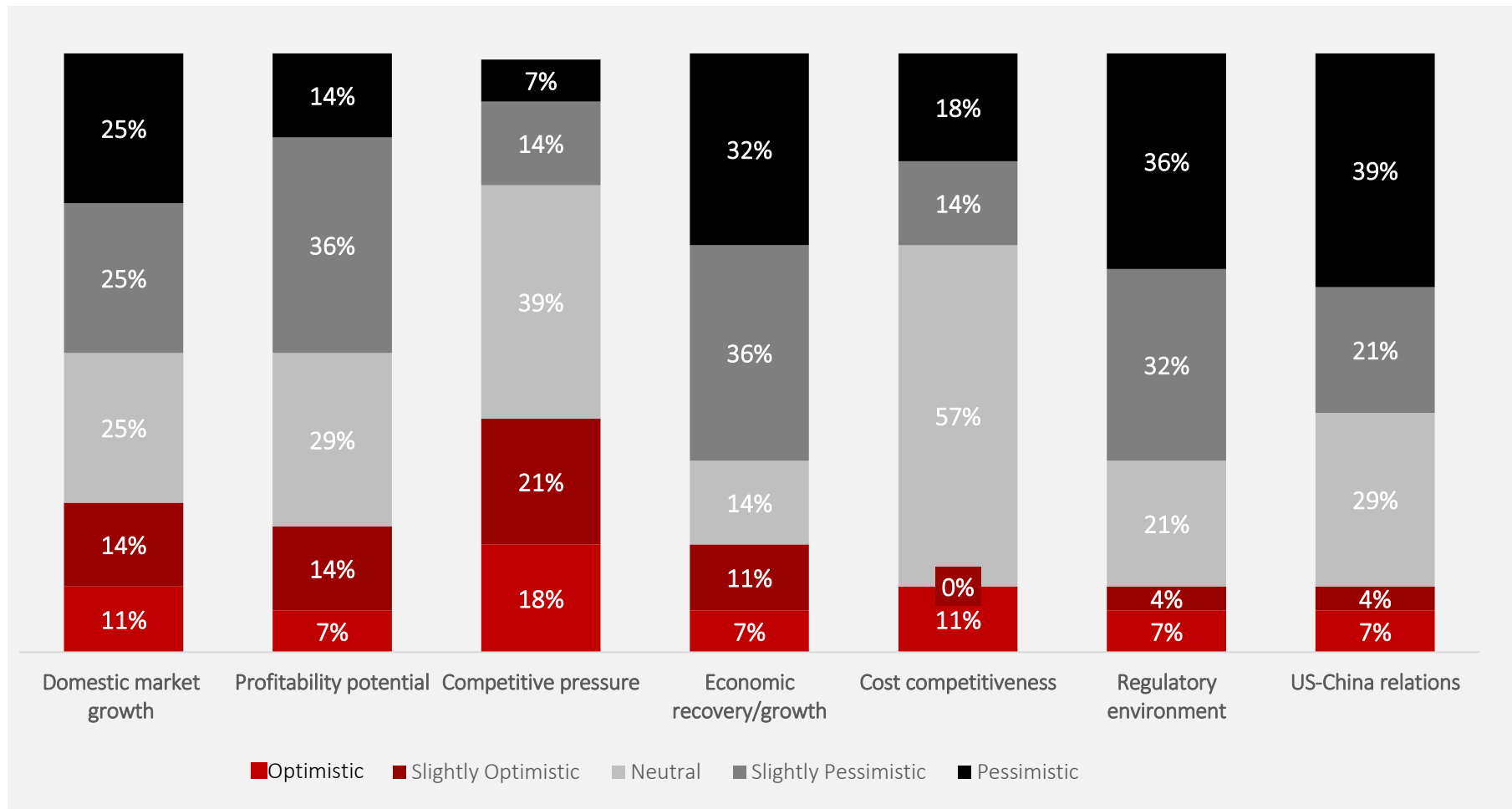


所有受访者



■ 首要投资目的地 ■ 前三大投资目的地
■ 众多投资目的地之一 ■ 不是优先考虑对象

Two-Year Business Outlook in China



Top three business challenges

Education Sector	All Respondents
Rising tensions in US-China relations 71%	Rising tension in US-China relations 66%
COVID-19 prevention measures 68%	COVID-19 prevention measures 55%
Shortage of qualified employee 36%	Inconsistent regulatory interpretation and unclear laws & enforcement 32%

Top three business opportunities

Education Sector	All Participants
Growth in domestic consumption/Rising of an increasingly sizable and affluent middle class 43%	Growth in domestic consumption/Rising of an increasingly sizable and affluent middle class 45%
Increasing consumer demand for foreign brands/quality 36%	Ongoing economic and market reform 36%
Ongoing economic and market reform 32%	Preferential FDI policies 23%

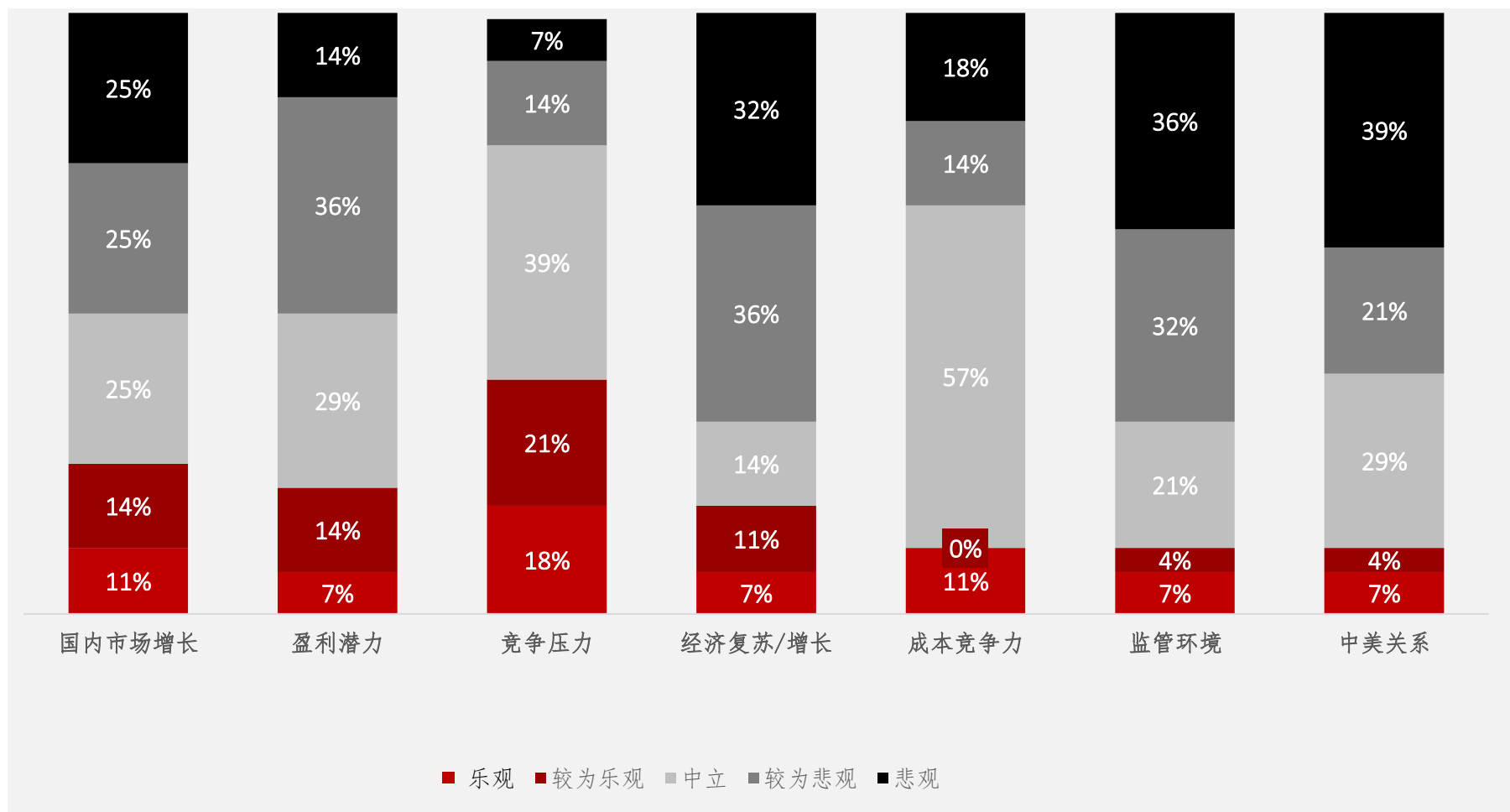


About AmCham China Business Climate Survey Report

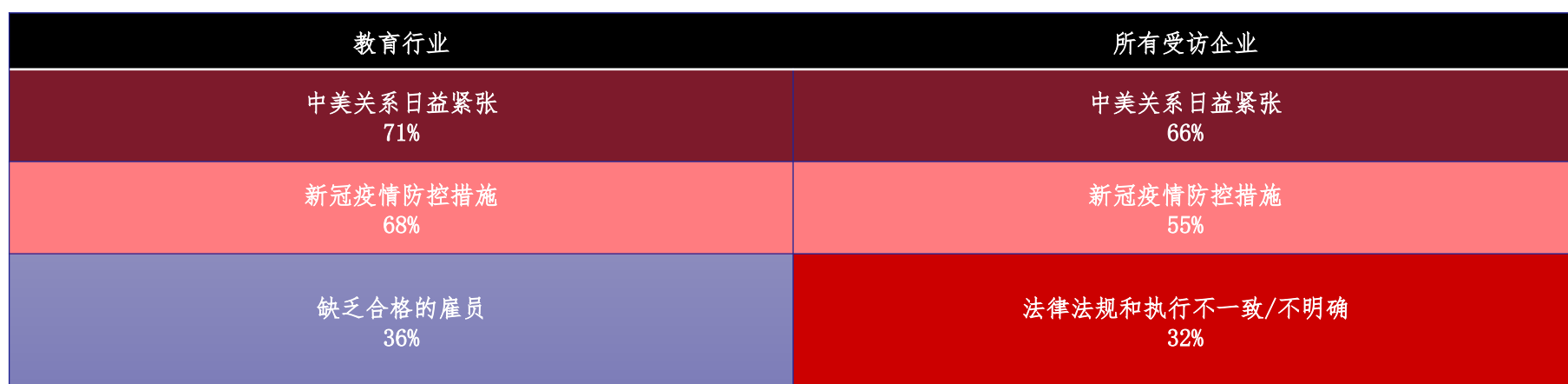
The China Business Climate Survey (BCS) is one of AmCham China's most important advocacy tools. It provides valuable insights to the Chinese and US governments about member companies' concerns concerning China's regulatory and policy environment and the daily business challenges they face operating in China. Furthermore, the survey provides a valuable tool for our members to measure their operations and compare business outlooks and strategies with the broader community.

Visit [here](#) for more information on the report

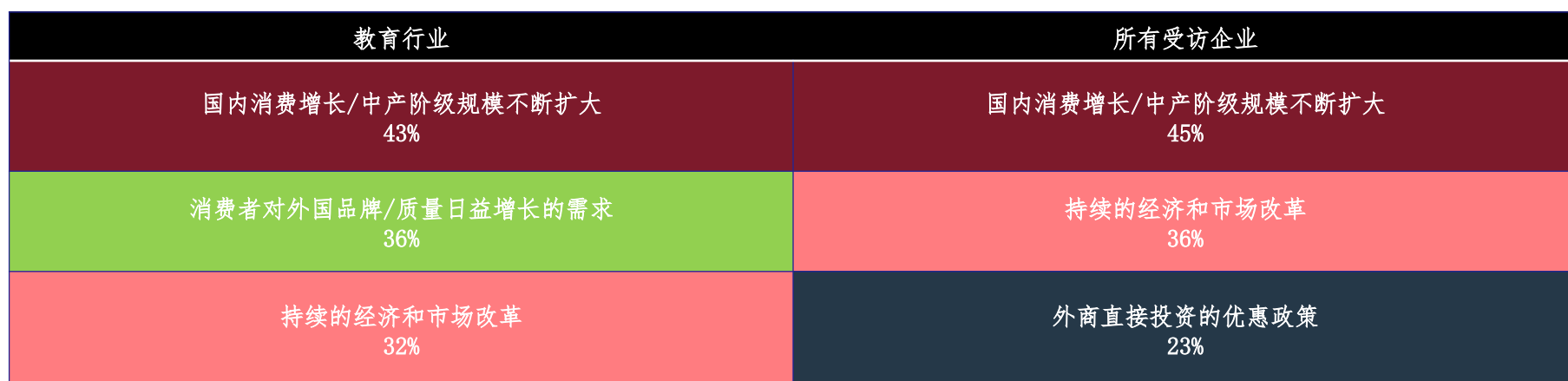
今后两年在华运营前景



前三大商业挑战



前三大商业机遇



关于中国商务环境调查报告

中国商务环境调查报告 (BCS) 是中国美国商会最重要的政策谏言工具之一。该报告结果反映了商会会员企业对中国的监管和政策环境以及在华日常运营的真实情况，为中美两国政府提供了宝贵而深入的见解。此外，报告结果也为商会会员企业以及在华外资企业运营、投资决策等方面提供了衡量依据。

更多详情，请点击[这里](#)。