

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

Other Services (e.g., Law, Human Resources, Accounting, Marketing, Advertising and PR, Research, Consulting, etc.) Industry Report

其他服务业（如法律，人力资源，会计，营销，广告及公关，研究，咨询等）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

 **Other Services (e.g., Law, Human Resources, Accounting, Marketing, Advertising and PR, Research, Consulting, etc.) Sector**
Executive Summary

- In 2022, 53% of the other Services member reported a profit increase, 9pp higher than the overall respondents. 76% of the sector members estimated their 2022 revenue would not be up, an 8pp higher than the overall respondents.
- Only 15% of the sector members said that the quality of China's investment environment is improving, and almost half of them (47%) ranked China not as the near-term first or top three investment destinations.
- 36% of the sector members believed China's market growth would rebound in 2023 - 2025, and another 31% expressed optimistic views about China's economic recovery.
- 34% of the sector members are concerned about the shortage of qualified employees as one of their top three business challenges; another 44% said that the globalization of Chinese companies and increased outbound investment is their top business opportunity in China.

本报告从2023年度BCS报告全文中摘取了其他服务行业的数据，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。

***此报告中的所有数据四舍五入到最接近的整数，因此一些图表数值可能不等于100%。*

*** BCS中的一些回答选项和类别会有所变动，以顺应当下不断变化的市场现状。*

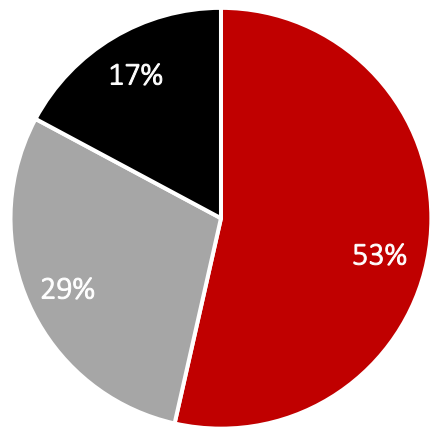
- 摘要
- 营收状况
- 在华投资计划
- 今后两年中国业务展望
- 在华运营前三大挑战和机遇

其他服务业（如法律，人力资源，会计，营销，广告及公关，研究，咨询等）行业摘要

- 2022年，53%的其他服务业会员企业报告盈利，较所有受访会员企业高出9个百分点；76%该行业会员企业预测公司营收不会出现增长，较所有受访会员企业高出8个百分点。
- 仅15%的该行业会员企业表示中国整体投资环境有所改善，同时，约一半的该行业会员企业（47%）没有将中国列为近期首要或前三大投资目的地。
- 36%的该行业会员企业相信中国的市场增长趋势将会在2023-2025年出现反弹迹象，另有31%的该行业会员企业对中国经济恢复持较乐观态度。
- 34%的该行业会员企业认为“缺少合格的员工”是其在华运营的前三大挑战之一。
- 44%的该行业会员企业认为“中国公司的全球化和境外投资增长”是其在华运营的前三大机遇之一。

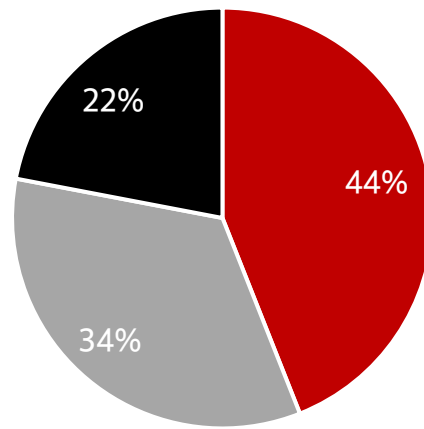
Financial Performance

Other Services Sector



■ Profitable ■ Break even ■ Loss

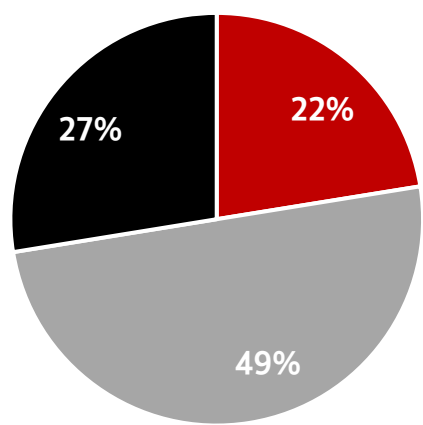
All respondents



■ Profitable ■ Break even ■ Loss

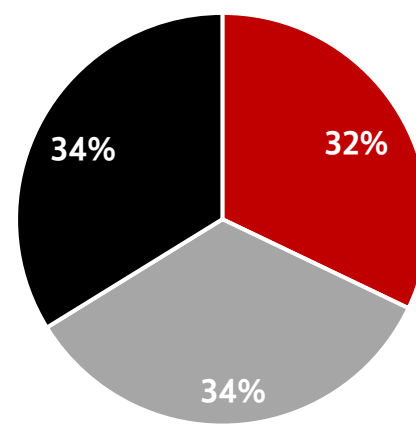
Estimated Revenue

Other Services Sector



■ Up ■ Comparable(± < 2%) ■ Down

All respondents



■ Up ■ Comparable(± < 2%) ■ Down

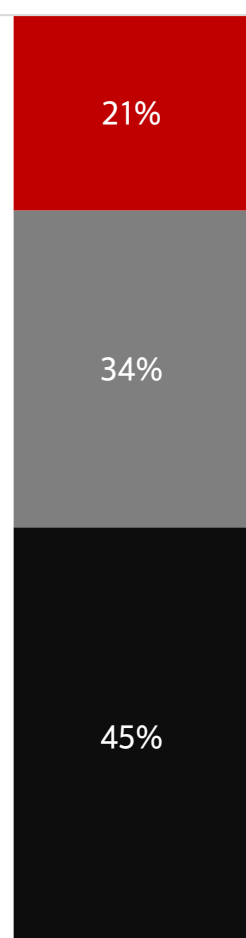
Investment Plan

China Investment environment quality

Other Services



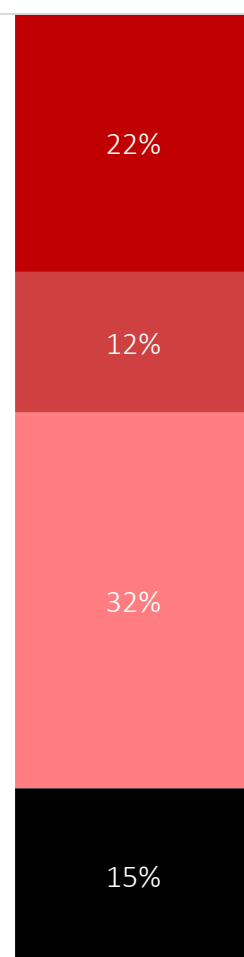
All



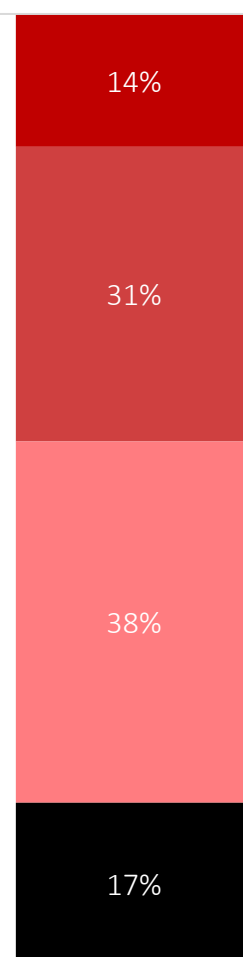
■ Improving ■ Staying the same ■ Deteriorating

China ranks of near-term global investment destination

Other Services



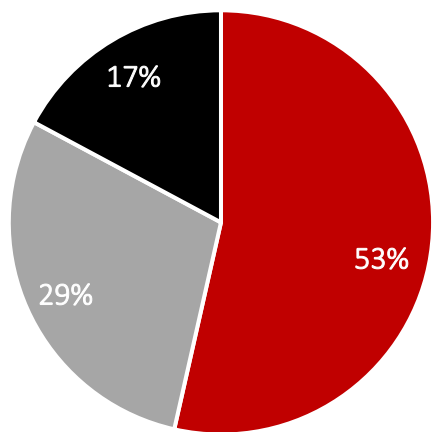
All



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

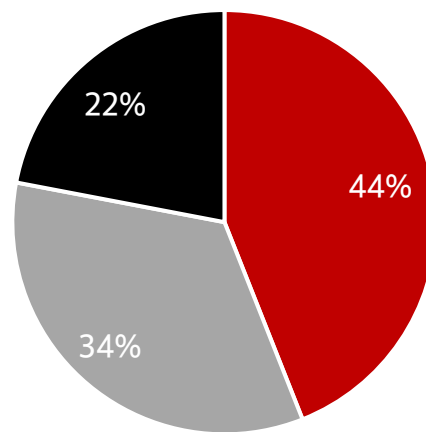
财务状况

其他服务业



■ 盈利 ■ 基本持平 ■ 亏损

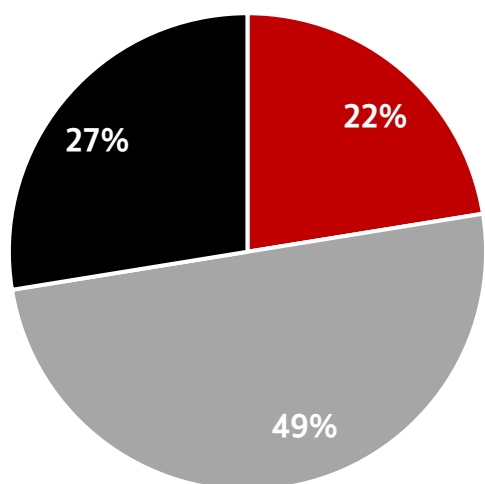
所有受访者



■ 盈利 ■ 基本持平 ■ 亏损

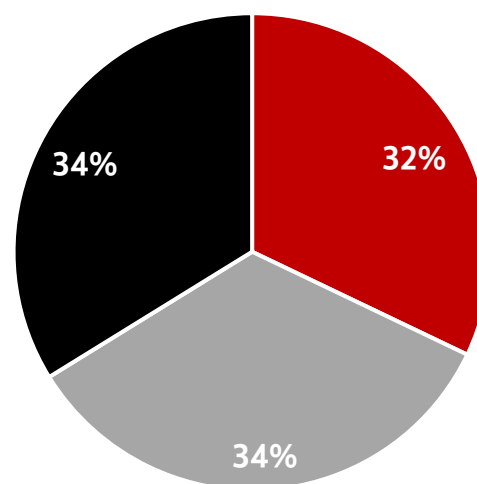
预计年度经营收入

其他服务业



■ 上升 ■ 持平(± < 2%) ■ 下降

所有受访者



■ 上升 ■ 持平(± < 2%) ■ 下降

在华投资计划

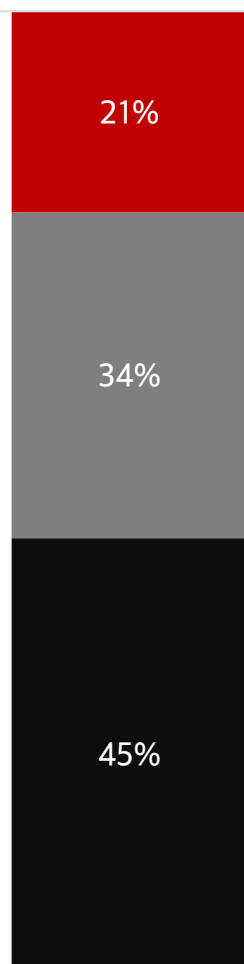
中国投资环境质量

其他服务业



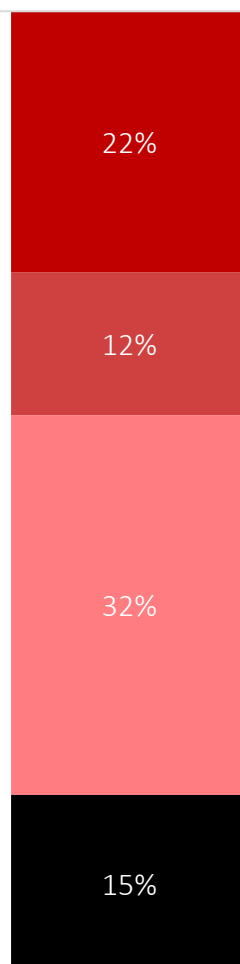
■ 有所改变 ■ 保持不变 ■ 有所恶化

所有受访者



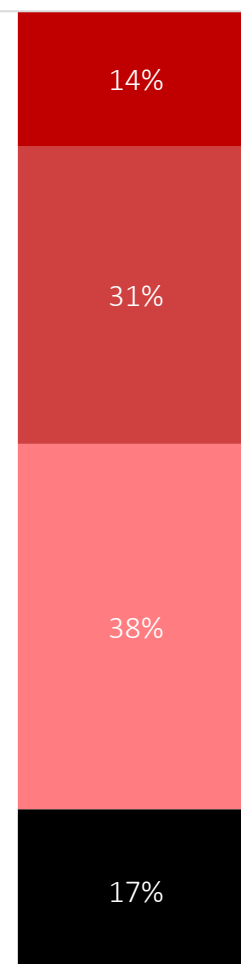
中国最为公司近期全球投资目的地的排名

其他服务业



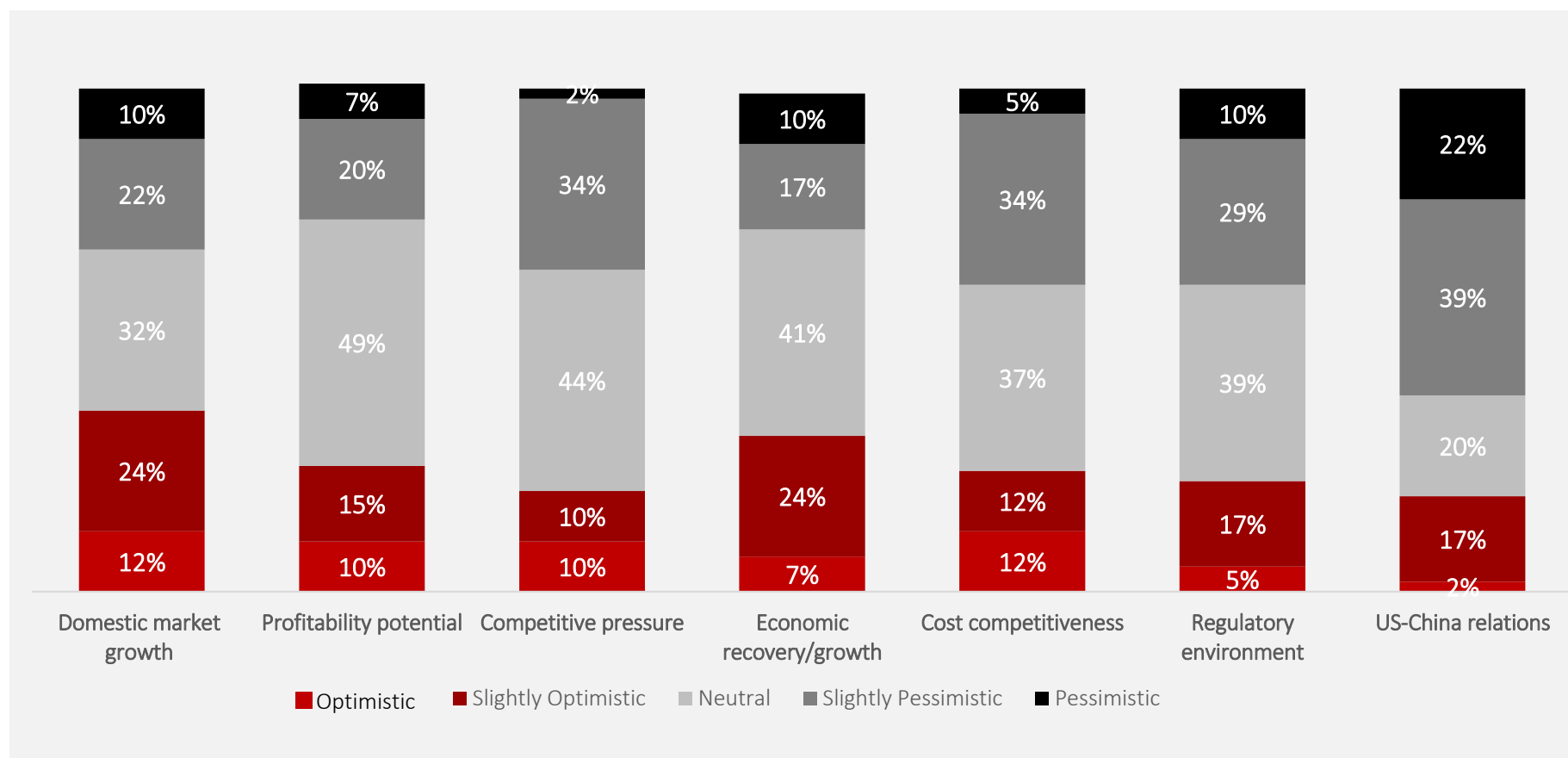
■ 首要投资目的地
■ 众多投资目的地
■ 不是优先考虑对象

所有受访者



■ 前三大投资目的地
■ 不是优先考虑对象

Two-Year Business Outlook in China



Top three business challenges

Other Services Sector	All Respondents
Rising tensions in US-China relations 66%	Rising tension in US-China relations 66%
COVID-19 prevention measures 49%	COVID-19 prevention measures 55%
Shortage of qualified employees 34%	Inconsistent regulatory interpretation and unclear laws & enforcement 32%

Top three business opportunities

Other Services Sector	All Participants
Globalization of Chinese companies and increased outbound investment 44%	Growth in domestic consumption/Rising of an increasingly sizable and affluent middle class 45%
Ongoing economic and market reform 27%	Ongoing economic and market reform 36%
Preferential FDI policies 24%	Preferential FDI policies 23%

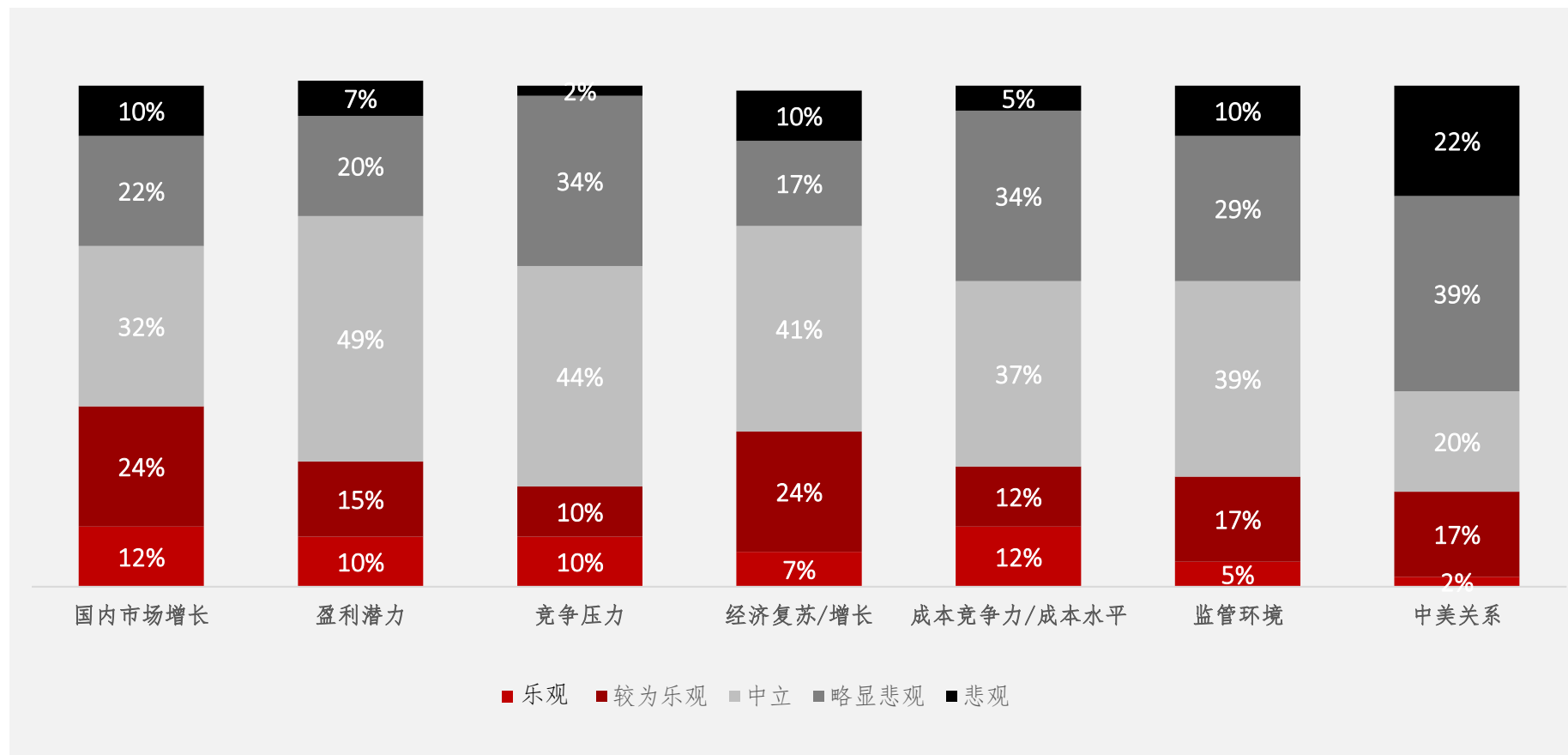


About AmCham China Business Climate Survey Report

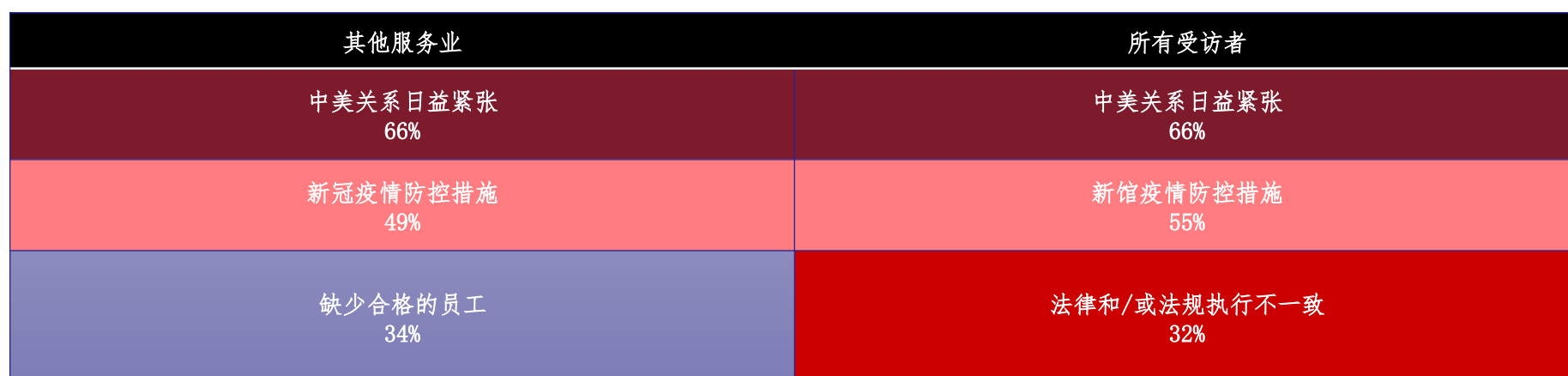
The China Business Climate Survey (BCS) is one of AmCham China's most important advocacy tools. It provides valuable insights to the Chinese and US governments about member companies' concerns concerning China's regulatory and policy environment and the daily business challenges they face operating in 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

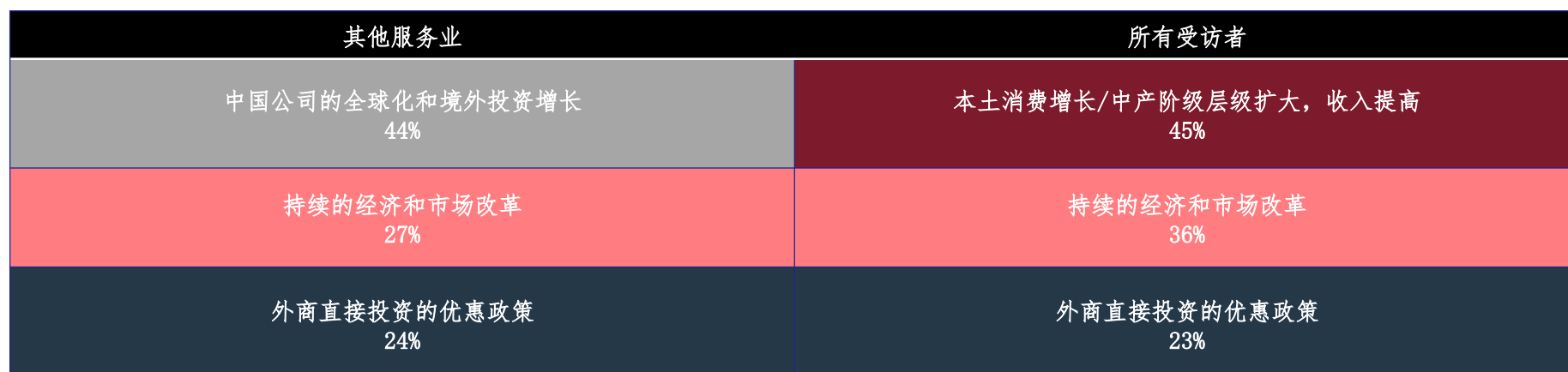
今后两年中国业务展望



前三大在华运营挑战



前三大在华运营机遇



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外资企业在华运营、投资决策等方面提供了衡量依据。

更多详情,请点击[这里](#)。