

2024

2024

Online Survey of Micro-and-small Enterprises (OSOME):
Quarterly Report (2024Q2) and Confidence Index (2024Q3)

Center for Enterprise Research, Peking University

Institute of Social Science Survey, Peking University

Ant Group Research Institute

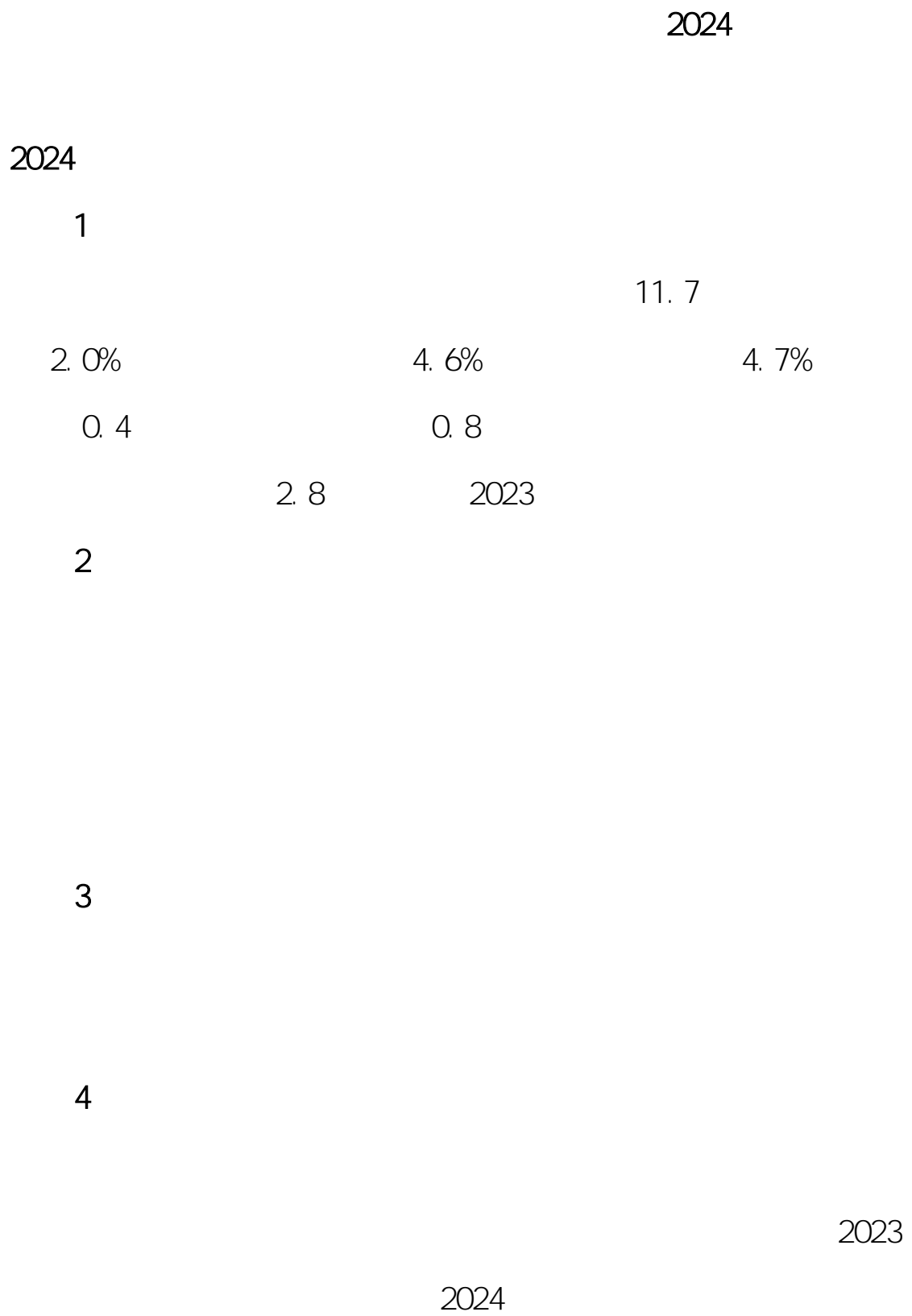
Mybank

2024 8

August, 2024

<https://cer.gsm.pku.edu.cn/survey/OSOME/xnj.j.htm>

<https://www.deor.org.cn/research/confidencedata>



			21.1%
		8.3%	1.5
5			
	4.6		8.5
		72.1%	13.3%
	3.3		
"	"	"	"
	"		
6			
			2024
GDP		3.0%	3.4%
	5%	GDP	
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8	2024		

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49.7%

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" (Enterprise Survey for Innovation and Entrepreneurship in China ESI EC)³

2023

GDP

CPI

AB

2024

4

41% 8% 51%
 76% 13% 11%
 80 90
 " "
 2.5 21.4% 48.1%
 20.9%
 44.8% 31.9%
 23.3%
 0-4 81.3%

2024

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4.7

1 2024

1-4

4.7	1.0	41.3%	40.0%
1.8	0	60.1%	30.4%
4.6	2.0	30.1%	48.4%
20.3	5.0	13.6%	35.8%

2024

3.7

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76.3%

2024

74.4%

15.3

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2 2024

	2023Q4		2024Q1		2024Q2	
	3.0	78.8%	2.8	74.4%	3.7	76.3%
	1.4	82.5%	1.5	85.2%	1.7	97.5%
	3.1	82.4%	2.9	76.1%	3.6	75.7%
	11.8	71.9%	10.1	64.3%	15.3	68.4%

1.
 4.6%
 34.8
 0.5% 0.1
 21.8% 1.5
 3
 11.7
 2.0%
 2.5% 0.9
 20.8% 1.4
 3⁶
 1.2% 0.5
 13.6
 5.3
 6.0% 0.9

	2022Q1	2022Q2	2022Q3	2022Q4	2023Q1	2023Q2	2023Q3	2023Q4	2024Q1	2024Q2
	12.3	13.6	13.6	11.2	10.2	12.0	14.2	14.7	12.3	11.7
	6.6	7.5	7.0	4.9	4.8	6.7	7.5	7.9	6.8	5.3
	11.6	13.5	13.5	11.9	11.5	13.5	15.7	17.3	14.5	13.6
	33.2	34.9	35.6	34.7	31.0	35.7	42.0	41.6	35.3	34.8

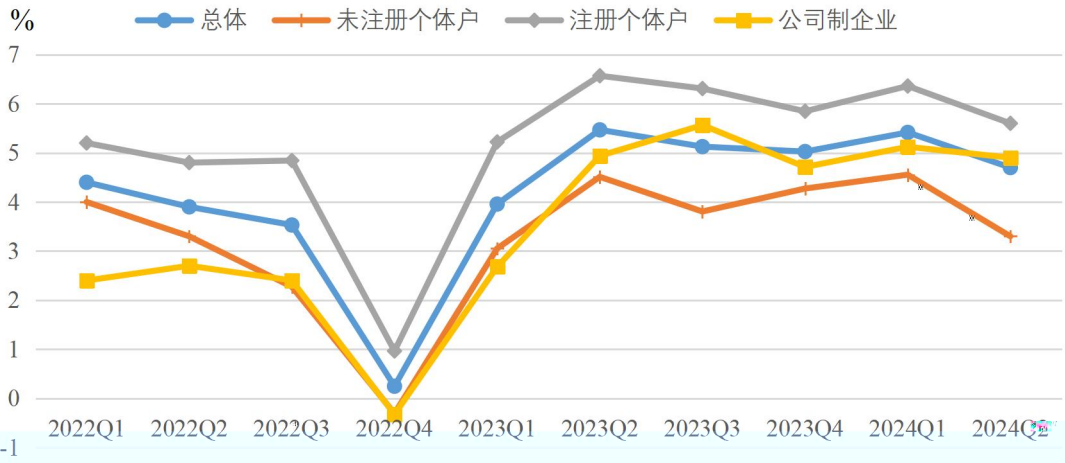
2024
 0.8
 0.2
 4.7%
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 4.9%
 5.6%
 0.7

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3.3%

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%

2023Q2

2023Q3

2023Q4

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10.5%

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24.5%

21.9%

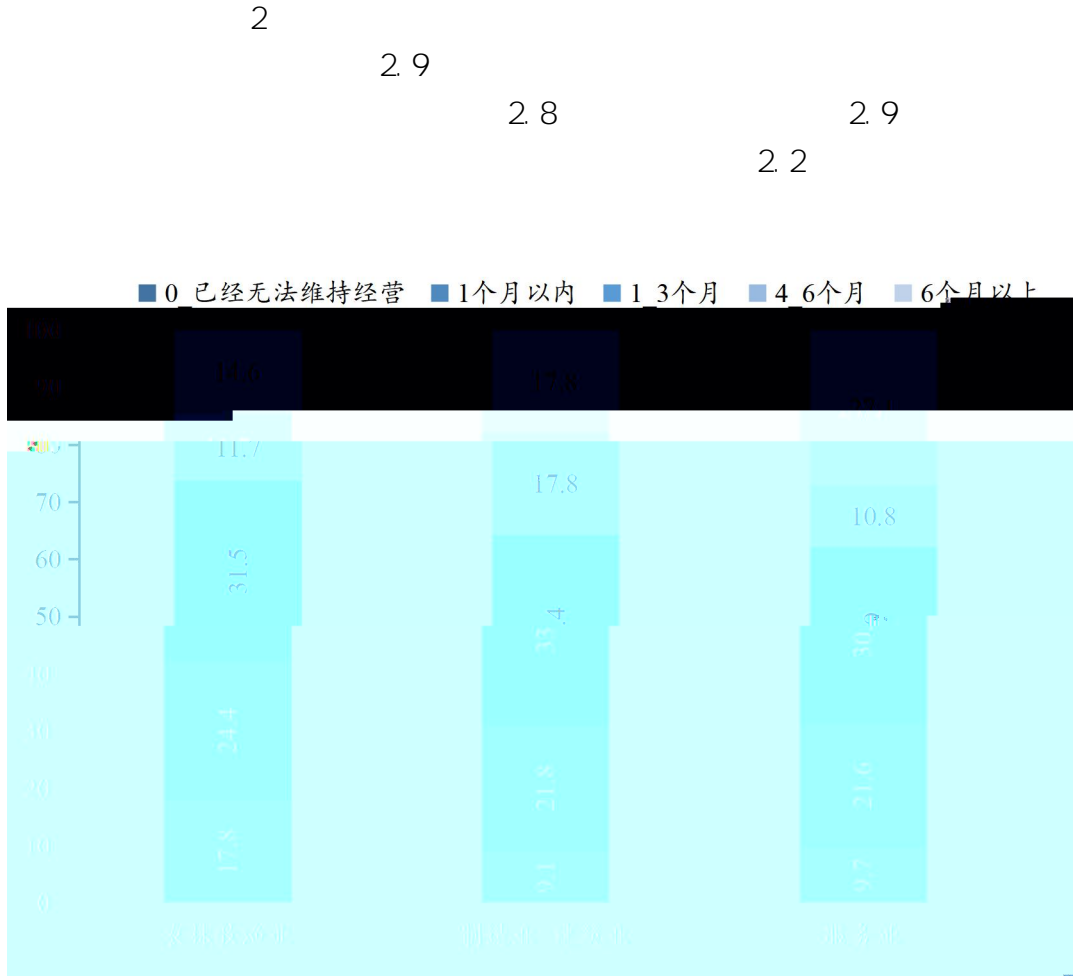
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2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4	2024 Q1	2024 Q2
2.4	2.6	2.7	2.4	2.6	2.8	2.9	2.8	2.8	2.8
2.4	2.4	2.5	2.2	2.4	2.6	2.7	2.6	2.6	2.5
2.3	2.7	2.8	2.5						

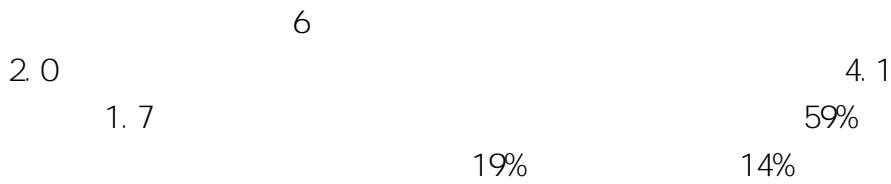


	2.4	2.6	2.7	2.4	2.6	2.8	2.9	2.8	2.8	2.8
0		13.6	13.1	16.0	11.1	9.7	9.9	10.8	9.3	10.5
1	38.2	33.9	33.2	22.1	21.8	23.3	20.6	30.4	22.6	21.9
1-3	40.8	20.6	20.0	33.1	36.1	31.0	31.6	23.1	31.6	3.2
4-6	8.8	10.6	11.1	9.6	10.7	10.0	11.7	10.7	10.5	11.8
6	12.3	21.3	22.6	19.2	20.3	26.0	26.2	25.0	26.1	24.5



2 2024

1. 2024



12%

10%

1.9

4.3

6

%

2022Q1	2022Q2	2022Q3	2022Q4	2023Q1	2023Q2	2023Q3	2023Q4	2024Q1	2024Q2
51.5	45.1	43.1	38.1	43.9	39.1	43.2	43.1	41.5	43.2
46.5	40.2	43.1	38.9	46.9	49.5	50.1	52.4	51.2	49.2
21.7	23.0	21.8	22.4	20.5	16.3	16.5	17.7	17.3	16.5
21.8	26.4	28.1	31.1	14.4	7.8	9.0	9.1	9.4	8.7
6.4	4.9	6.6	8.4	9.3	6.4	9.3	7.9	8.8	10.7
4.9	6.3	5.1	4.8	3.8	14.2	6.6	6.2	6.7	5.6

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2024

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7

%

2022Q1	2022Q2	2022Q3	2022Q4	2023Q1	2023Q2	2023Q3	2023Q4	2024Q1	2024Q2
57.5	53.1	56.4	51.1	53.9	56.1	46.6	53.6	54.5	54.8
48.0	46.4	42.6	37.7	42.9	44.5	34.6	40.5	49.1	49.5
29.4	27.7	29.1	29.4	28.6	26.4	28.5	27.5	30.1	27.8
11.6	8.6	9.5	10.4	15.0	15.5	11.2	13.3	13.0	13.4
10.5	9.7	10.2	9.8	11.1	9.2	6.1	8.3	9.8	9.4
5.5	5.9	5.8	6.7	7.3	5.7	5.3	5.2	6.7	6.1
0.8	1.4	1.1	0.8	1.1	5.4	4.0	5.0	3.1	2.6

8

15.2%

9.5%

8 2024

%

-				
54.8	44.3	48.8	39.8	59.6
49.5	49.0	49.0	30.5	51.8
27.8	18.8	28.5	27.9	29.5

14.3	12.6	10.2	8.9	16.1
13.4	10.6	14.4	24.2	12.4
12.0	20.4	19.0	18.6	-.6

2

2023
2024
21.1%
18.7%
19.9%
10
10% 7%
18% 14% 10
10

										%
202202	202203	202204	202301	202302	202303	202304	202401	202402		
20.8	20.7	17.9	12.8	20.0	21.0	20.2	17.6	18.7		
18.5	18.0	15.7	11.8	17.7	18.8	18.4	17.2	19.9		
16.3	13.9	11.7	10.7	12.8	11.0	10.8	10.4	8.2		
12.2	11.0	9.4	9.0	14.9	18.6	19.1	20.7	21.1		
6.2	4.7	3.7	3.6	6.3	7.9	8.8	8.3	14.1		
5.0	4.1	4.8	5.7	9.0	11.6	10.8	11.1	18.2		
3.6	3.3	3.7	3.7	5.0	5.0	5.3	4.0	6.0		
3.7	4.3	3.6	2.8	5.4	4.9	4.7	4.9	6.2		
2.6	2.3	3.6	4.0	5.9	7.9	7.3	7.0	14.3		
1.9	2.6	2.5	2.0	2.3	1.9	2.1	2.1	2.2		

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APP
39.0%
17.1%
11.7%
11 Panel A
6.3%
48.7%
3.6
22.4%
0.9
11 Panel B
2024
38.1
2.5
11 Panel C

2.8 33.0 51.4

14.6 42.2

3.8

39.0 2.1

34.9 3.1 11 Panel C

27.6

3.9% 16.1 1.1

22.6

13 49.0

17.4 40.4

24.2

11

		2022Q3	2022Q4	2023Q1	2023Q2	2023Q3	2023Q4	2024Q1	2024Q2
Panel A:									
	%	42.0	41.2	49.4	49.0	44.4	42.8	44.0	32.3
	%	33.5	33.8	26.8	27.1	31.1	34.6	30.1	39.0
	%	9.5	10.7	11.5	12.7	12.8	13.2	15.7	17.1
	%	15	14.4	12.3	11.2	11.7	9.4	10.2	11.7
Panel B:									
	%	44.5	42.8	49.9	10.8	8.7	8.3	7.6	6.3
	%	32.0	32.4	25.6	50.8	44.8	46.2	45.1	48.7
	%	9.8	11.3	12.0	17.0	21.0	22.3	23.3	22.4
	%	13.7	13.5	12.5	21.4	25.3	23.2	24.0	22.7
Panel C:									
		26.5	23.3	26.1	30.5	35.6	32.3	35.6	38.1
		19.6	25.1	27.2	31.6	37.5	34.2	36.9	39.0
		14.3	16.4	22	26.8	30.6	26.2	31.8	34.9
		17.0	20.5	23.7	25.5	31.8	27.9	30.2	33.0
		27.5	38.2	41.6	51.9	57.8	64.2	66.0	51.4
		19.0	26.6	24.8	45.1	34.9	28.5	42.2	38.4

2023

Panel B

41.2%

32.6%

8.6

4.8% 2% 222% 12

24%

55.7%

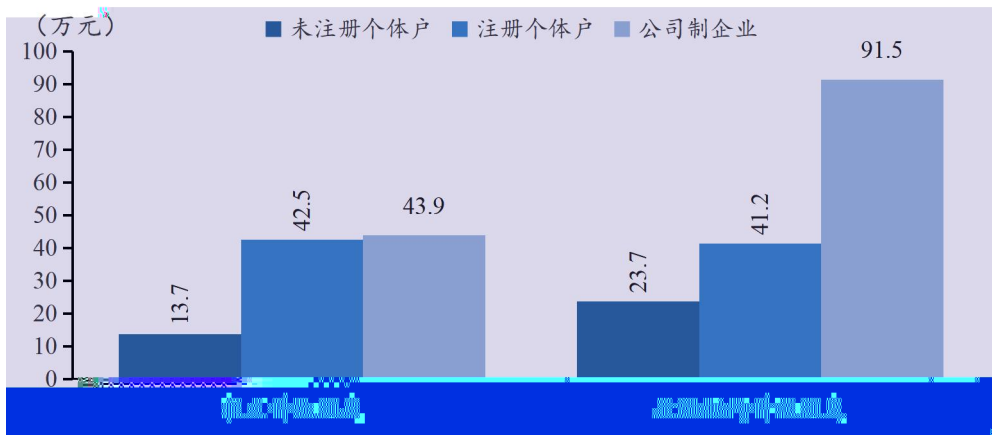
13.3%

3 2024

%

21.5	43.9	22.4
8.1	91.5	83.4
9.8	2024	13.7
11.5	3.9	23.7
1.5	2024	42.5
27.6	31	41.2
4	2024	
1.8		
1.4		

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4 2024

7.4%	13	8.3%	1.5
18%	14%	16	9.7%
			10%
			7%

" "

3.9%

1.6

13 2024

%

	2022Q2	2022Q3	2022Q4	2023Q1	2023Q2	2023Q3	2023Q4	2024Q1	2024Q2
%	8.4	7.4	7.9	7.3	8.4	9.2	9.0	8.7	9.7
%	6.3	5.8	5.8	5.5	6.3	6.7	6.3	6.0	7.4

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57.2

1.
2024

55.2%

50.6%

4.6

5

62.1%

55.8%

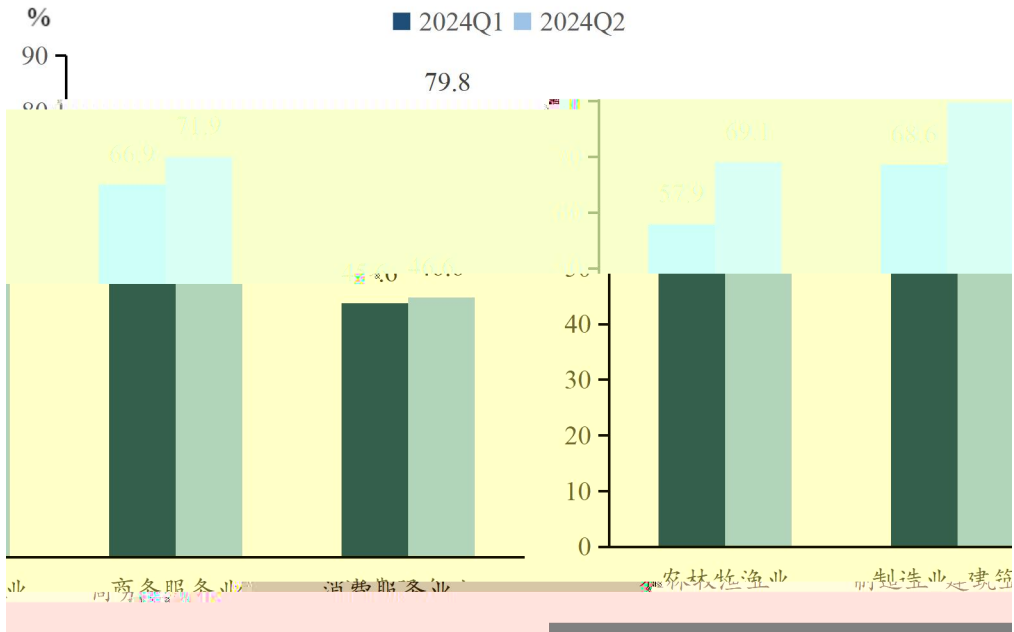
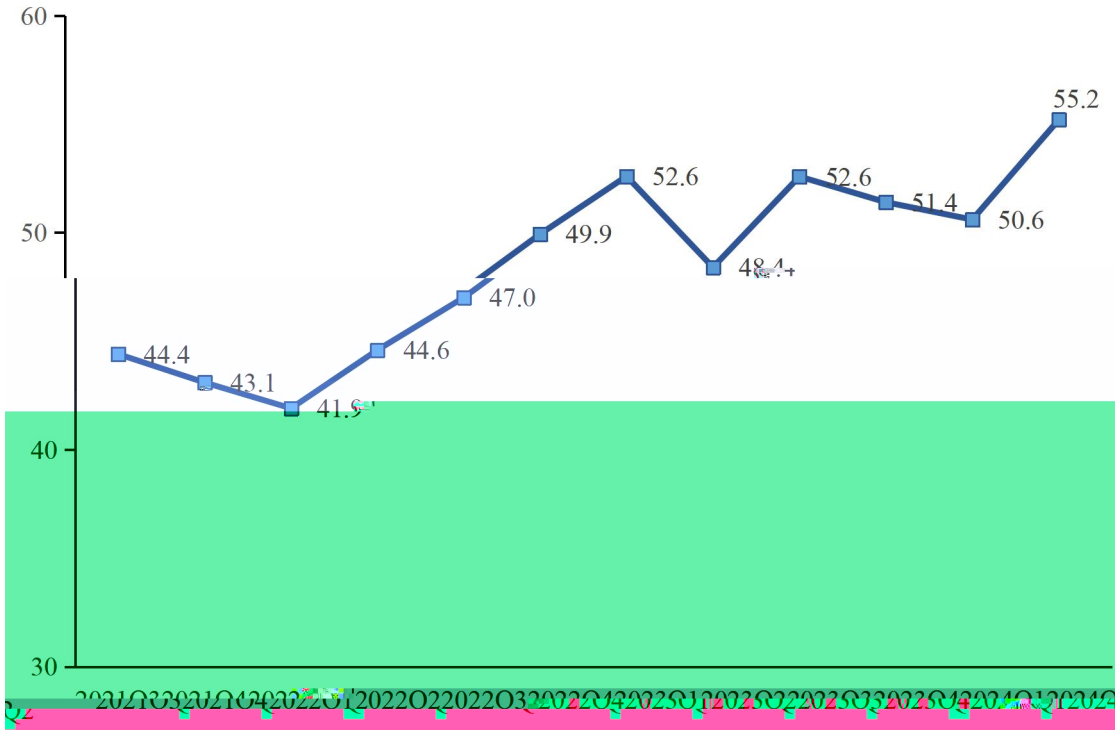
53.2%

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11.2

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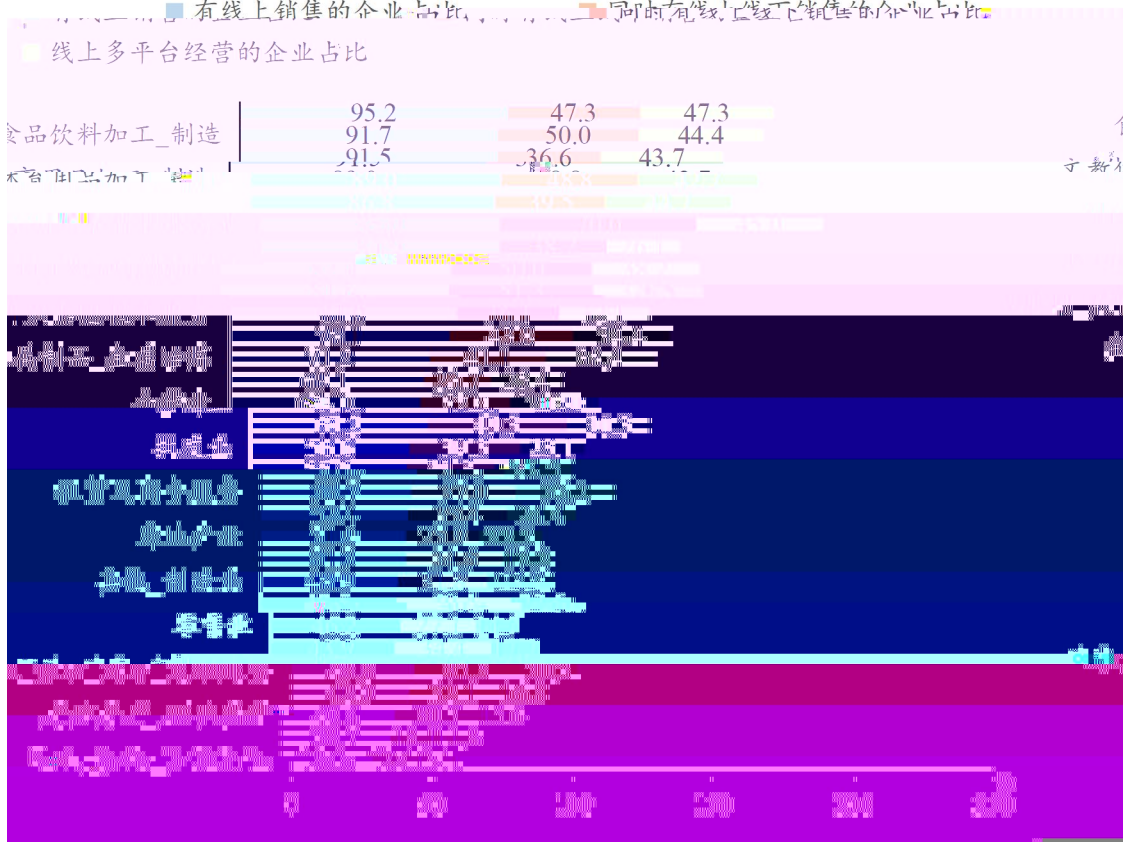
1.9 2023 19.1% 21.5%

18.6%

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85.0%

50%



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74.0%

14

14

202203 202204 202301 202302 2024

1.8

%

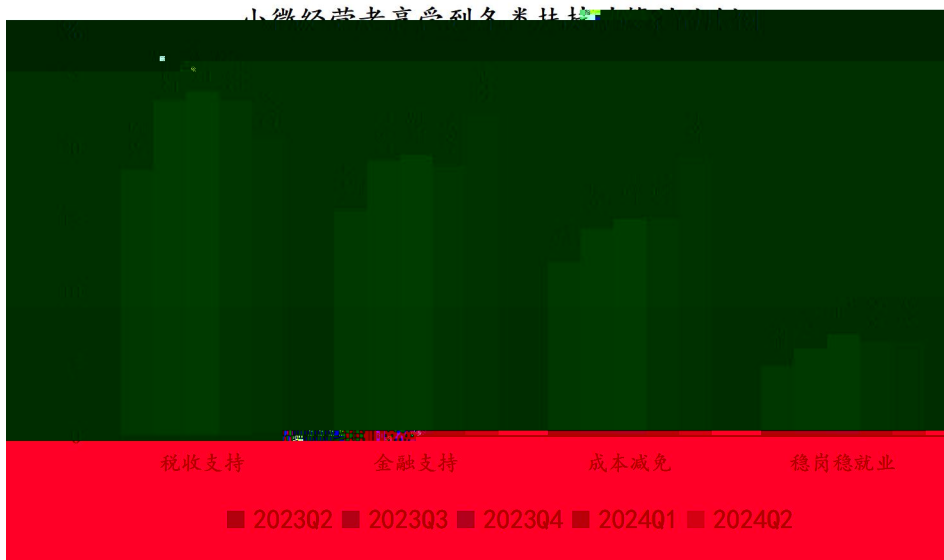
202. E

		60.5	60.7	63.2	67.3	71.9	71.3	72.2	74.0
-	-	25.5	24.5	24.1	26.9	27.6	26.9	24.9	23.6
		13.8	12.8	12.6	16.0	20.7	20.2	20.0	20.5
		14.6	16.6	16.9	15.8	19.8	18.5	19.1	19.4
		15.4	14.9	16.6	16.9	22.0	21.4	20.9	22.8
		9.8	9.4	9.6	6.7	9.6	9.5	9.5	9.3
		9.6	11.1	12.2	9.8	15.2	14.2	14.9	17.6
		7.3	6.6	7.6	5.1	8.7	8.1	8.3	8.5
		24.4	20.5	21.7	25.7	28.3	27.9	27.1	23.6

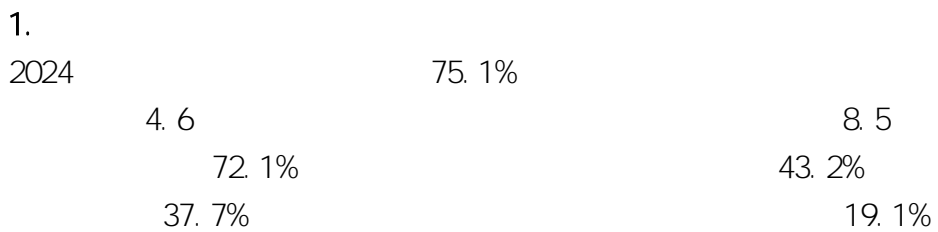
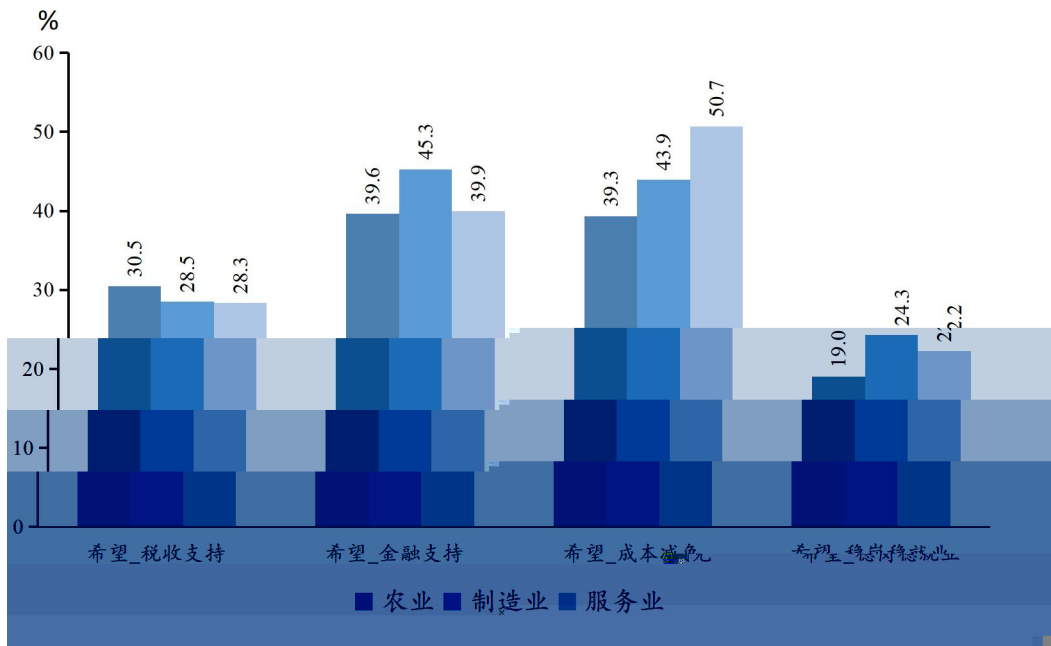
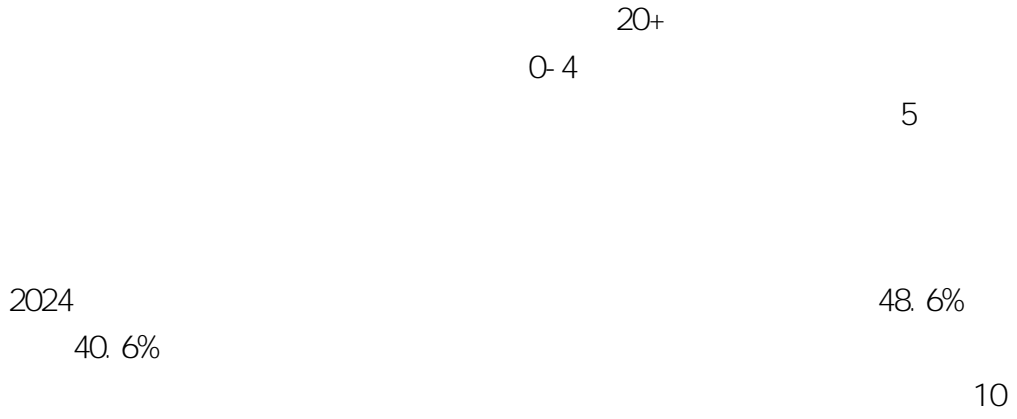


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2024 48.1% 43.8% 52.5% 9



9 2024



2023 2024
8.7

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2024

13.5%

3.3

16.7%

20.2%

12.5%

16

16

%

	2023Q3	2023Q4	2024Q1	2024Q2
	12.7	18.2	16.8	13.5
Panel A:				
	11.3	17.8	17.0	16.7
	13.0	18.5	18.5	13.5
	12.6	18.1	15.1	12.8
Panel B:				
	19.1	22.9	16.4	20.2
	12.0	17.4	16.1	12.5
	13.1	18.1	16.4	14.1
	12.8	20.5	20.7	14.3

26.7%

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17

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17

%

	2023Q3	2023Q4	2024Q1	2024Q2
	27.1	25.6	24.4	25.9
	20.7	23.5	23.6	24.1
	23.9	21.8	22.9	26.7
" "	18.3	21.0	18.7	20.4
	14.2	16.3	19.7	18.3
	10.2	13.5	12.2	16.2
/ /	7.4	9.6	9.8	8.7
	7.5	8.9	8.1	9.7
	6.2	8.2	7.6	7.1

	6.7	8.1	8.9	8.6
	4.8	7.5	6.8	6.3
	16.1	12.2	11.4	13.8

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18

(%):	2023Q4	2024Q1	2024Q2
	0.23	0.27	0.08
	0.48	0.30	0.18
	1.23	0.96	0.92

2024 GDP 3.0%

0.4 CPI 0.5%

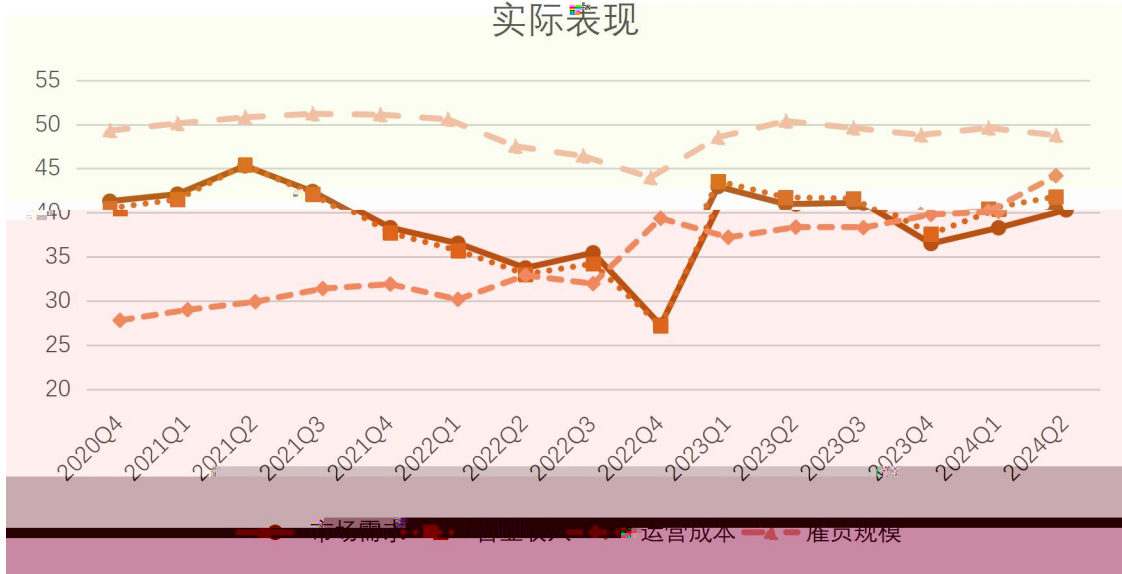
0.4

-5.4% 1.7 19

19

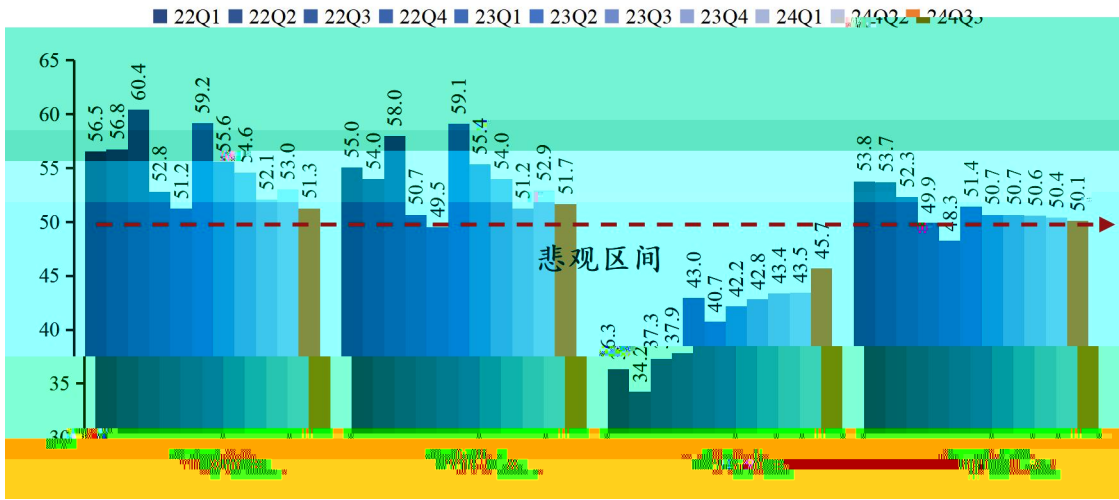
	2023Q4	2024Q1
2024 GDP	3.0	3.4
2024 CPI	1.3	0.9
2024	-3.9	-3.7





35

36		1.7	51.3%
	1.2	51.7%	
50.1%	2.2	45.7%	

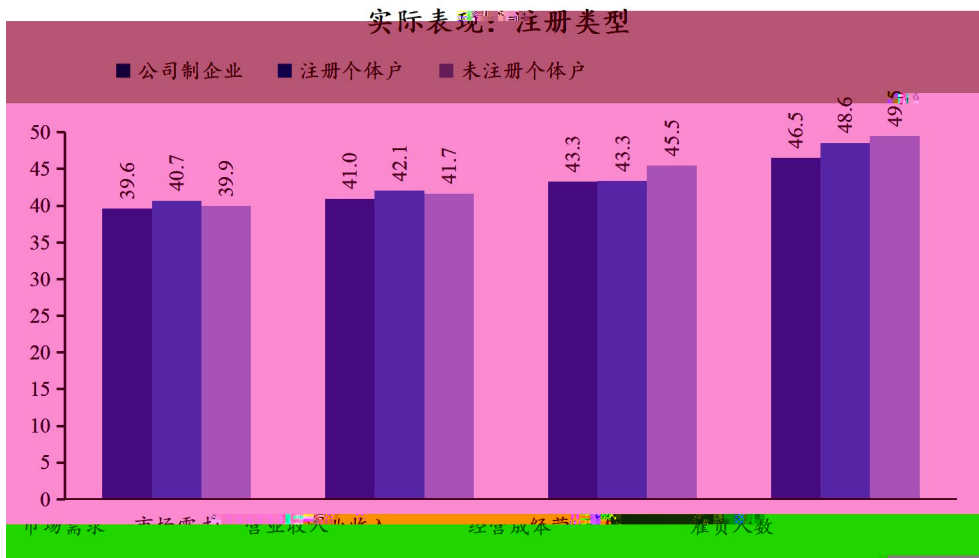


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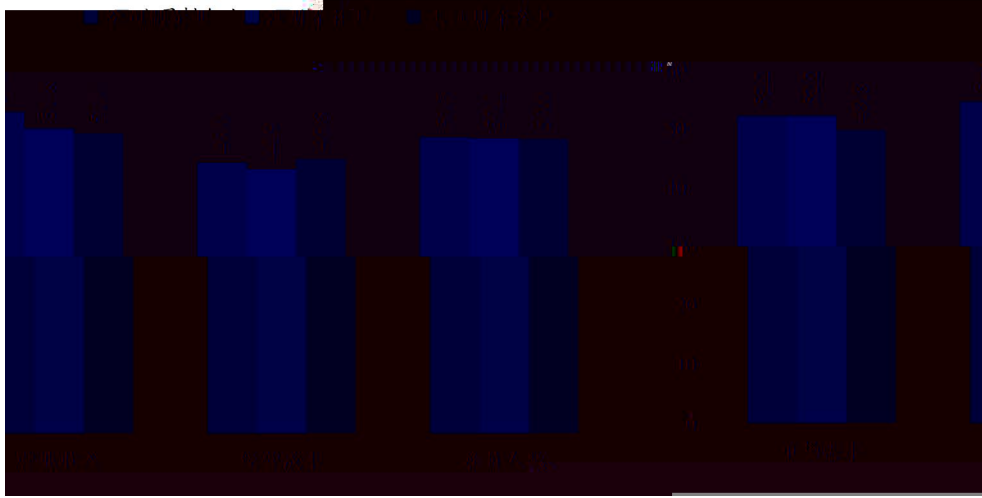
37

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37 2024

信心指数：注册类型



38 2024

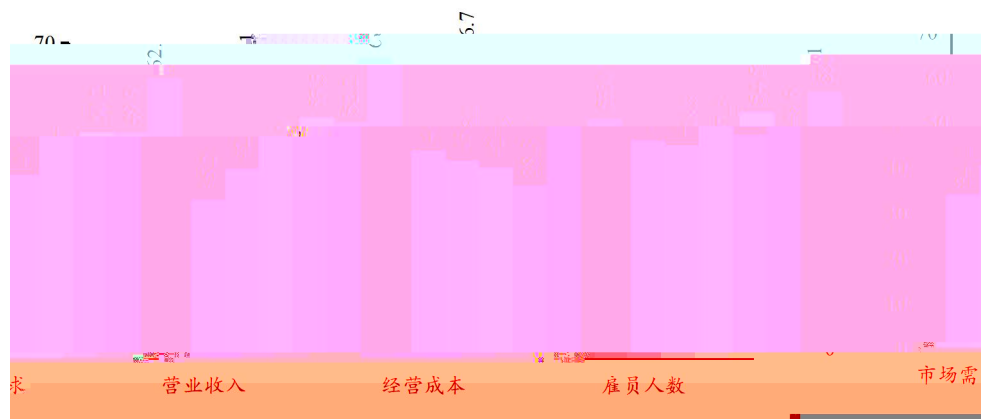
41

20

42

实际表现：雇员人数

■ 0人 ■ 1-4人 ■ 5-7人 ■ 8-19人 ■ 20人及以上

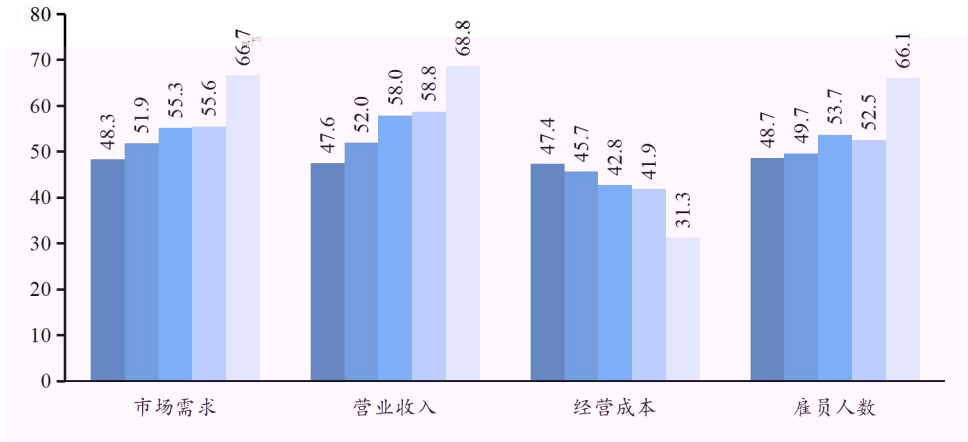


41 2024

%

信心指数：雇员人数

■ 0人 ■ 1-4人 ■ 5-7人 ■ 8-19人 ■ 20人及以上



42 2024

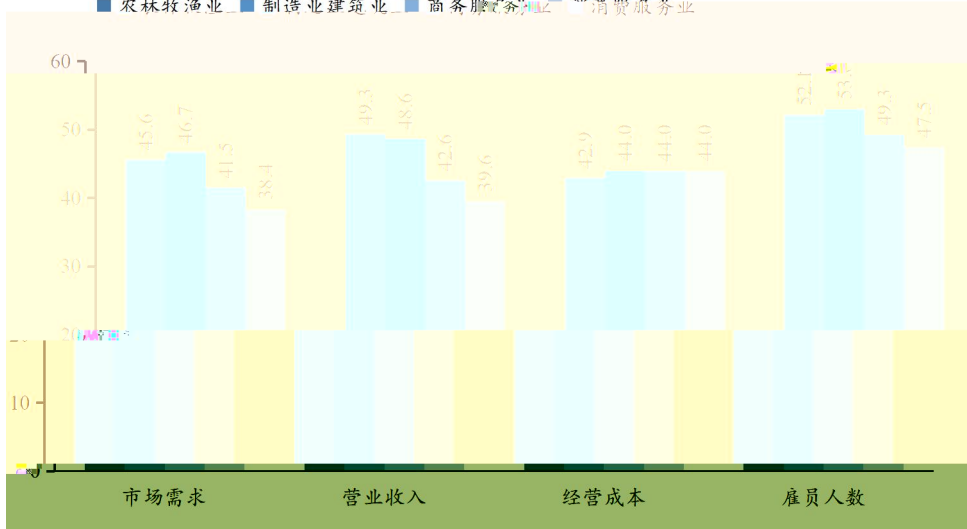
%

43

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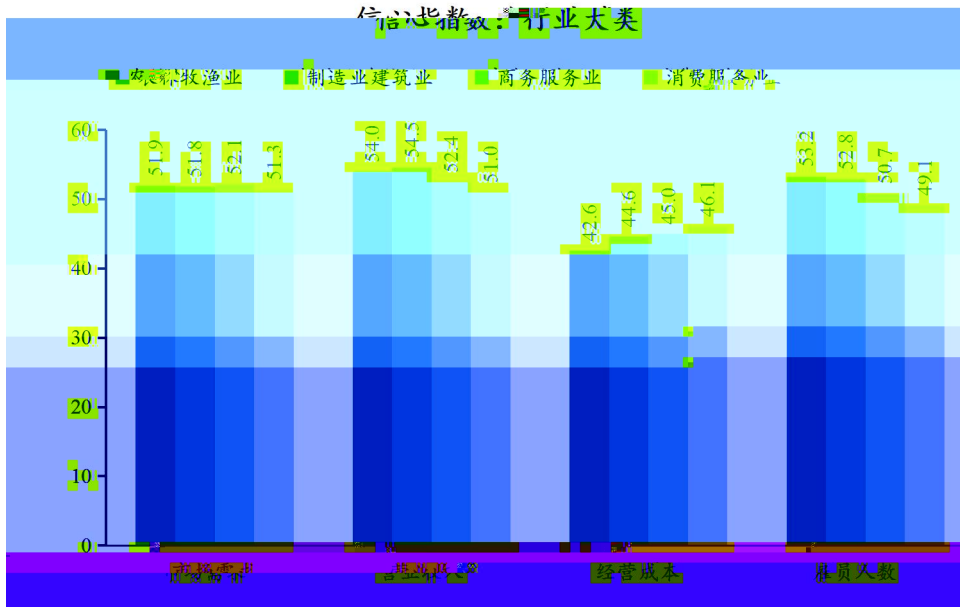
实际表现：行业大类

■ 农林牧渔业 ■ 制造业建筑业 ■ 商务服务业 ■ 消费服务业



43 2024

%

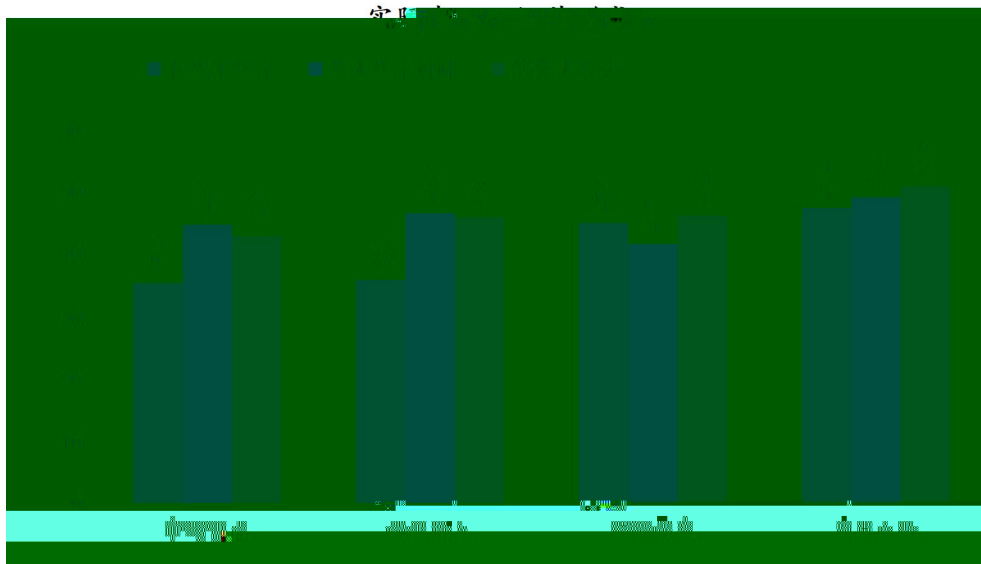


44 2024

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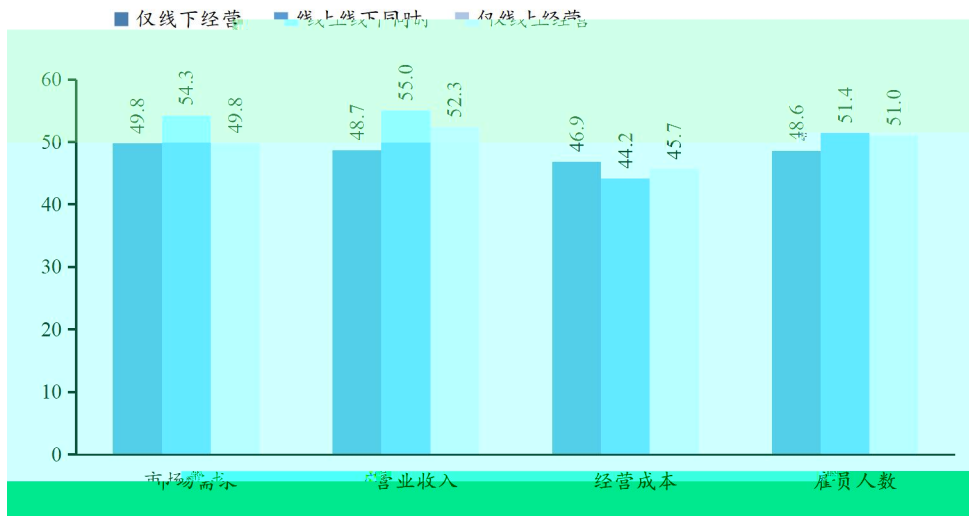
46



45 2024

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信心指数：经营形式



46 2024

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2024

GDP

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2024 GDP CPI

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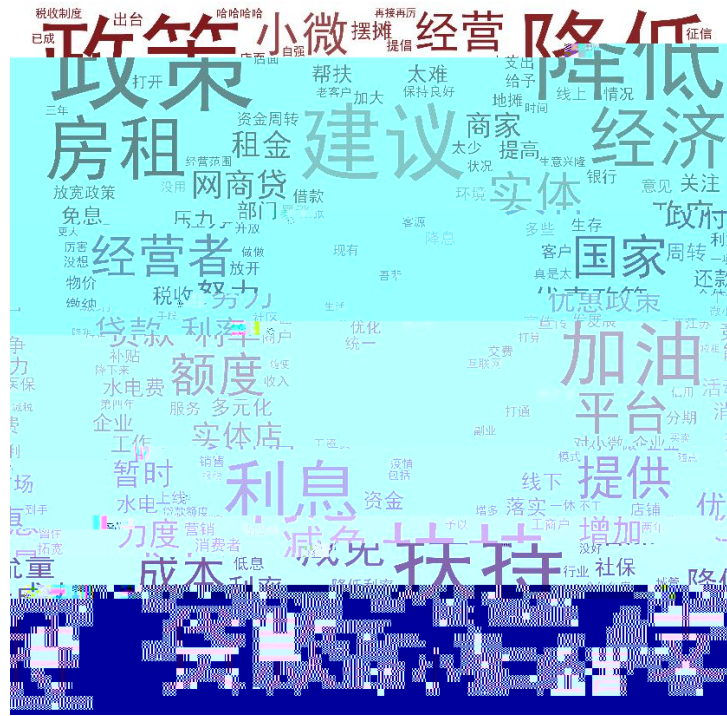
50.0% 49.7%

2024 6

9368

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1 2024

24% 64%

4.6% 17.3%

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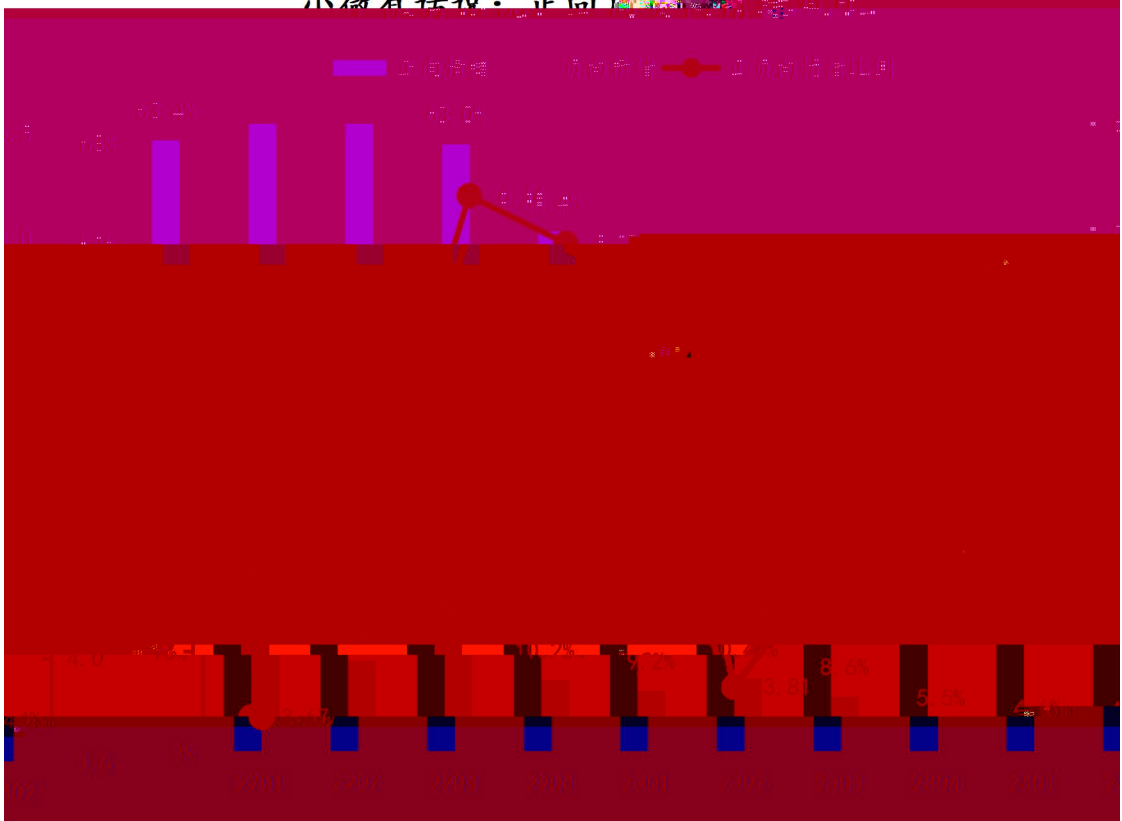
6.4

5.8

4.6

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小微有话说：正向负面舆情对比



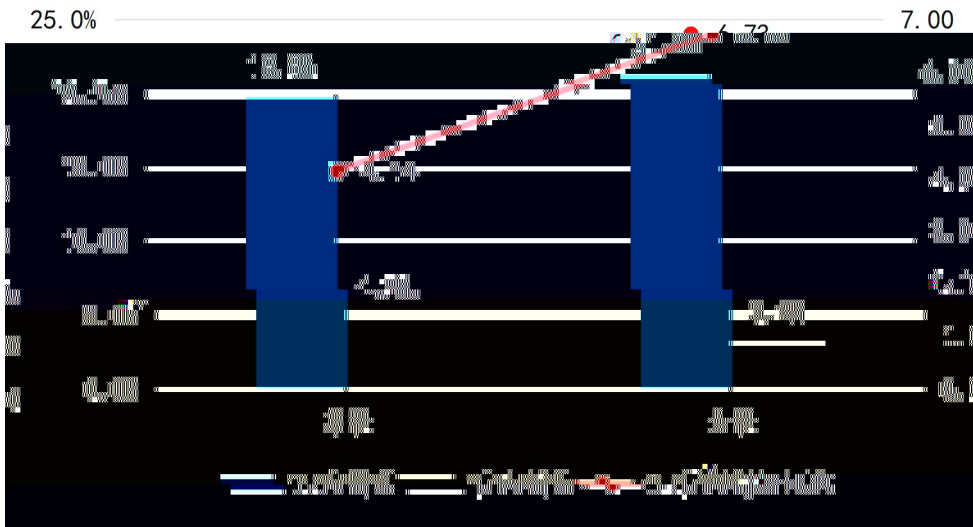
2 2024

1.5%

1.6%

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小微有话说：正向负向情绪对比24Q2（按性别分类）



3 2024Q2

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