

AmCham China Flash Survey Report on the Impact of COVID-19

中国美国商会关于新型冠状病毒肺炎影响的调查报告

Survey Methodology 调查方法

This flash survey was conducted between February 17 and 20, 2020, and 169 member companies completed the majority of the questions.

Survey respondents represent large, medium and small sized enterprises, including many with global operations and some with operations in Hubei, China and/or provinces surrounding the center of the COVID-19 outbreak. These companies also represent a broad range of industries that we have categorized into four main sectors, Technology & other R&D-industries, Resources & Industrial, Consumer (product and services) and Services.

本报告的调查时间为 2020 年 2 月 17 日至 20 日,共 169 家会员企业代表完成了大部分问卷。

调查受访者来自各行各业的大、中、小企业,其中很多拥有全球业务,部分企业位于新型冠状病毒肺炎疫情的重点区域湖北省以及周围省市。调查受访企业主要来自技术和其他研发行业、工业和资源行业、消费业(产品和服务)和服务业。

^{*}注:除非特别注明,中国在此指中国大陆。

Travel disruptions and reduced staff productivity present the most significant challenges for member companies; nearly one-third of respondents face increased costs and significantly reduced revenues

出行中断和员工生产力下降是会员企业临的 最大挑战;近三分之一的受访者面临成本增加和收入大幅降低的问题 Q9 - How is the COVID-19 epidemic impacting your business operations in China? (Check up to top three within each category)

新型冠状病毒肺炎疫情对贵公司在华业务运营有何影响? (每部分最多选择三项)

Finance 财务

Too soon to tell

暂时无法判断

Human resources 人力资源

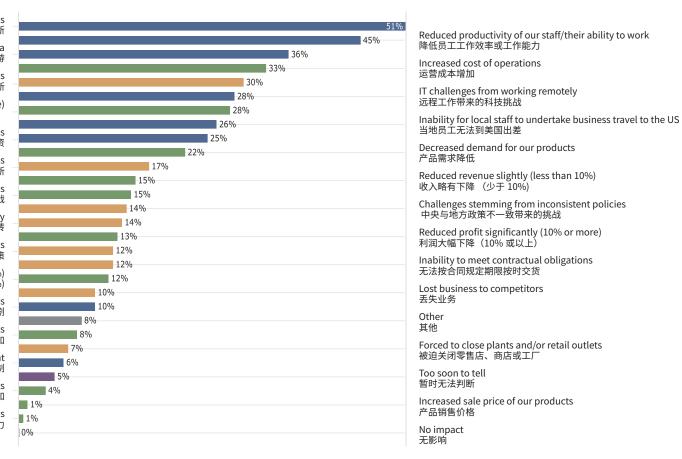
Other

其他

 Manufacturing and supply chain 制造和供应链

n=169



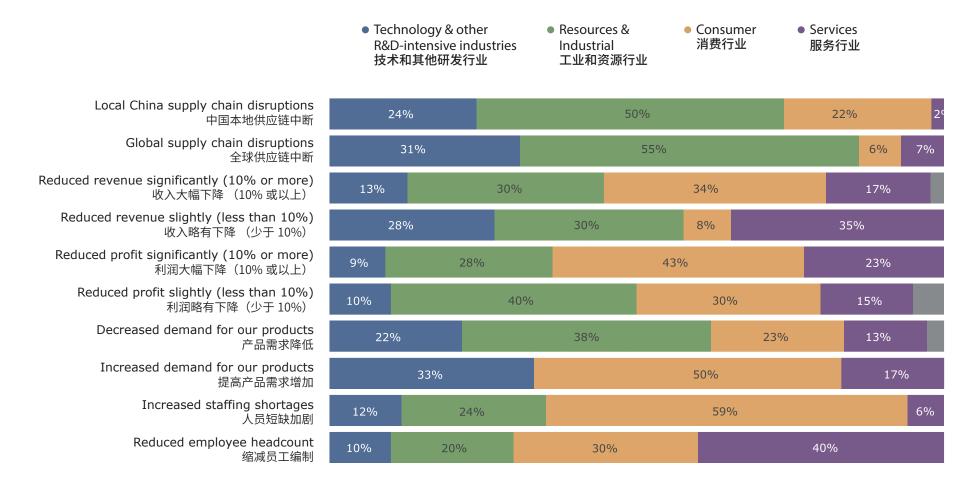


Among those experiencing supply chain disruptions as a result of COVID-19, half are from the R&I sector and one-fourth to one-third are from the Technology sector

选择"供应链中断"的会员企业有至少一半来自工业和资源行业,1/4至 1/3 来自技术和其他研发行业

Q9 - How is the COVID-19 epidemic impacting your business operations in mainland China? (Check up to top three within each category)

新型冠状病毒肺炎疫情对贵公司在华业务运营有何影响? (每部分最多选择三项)



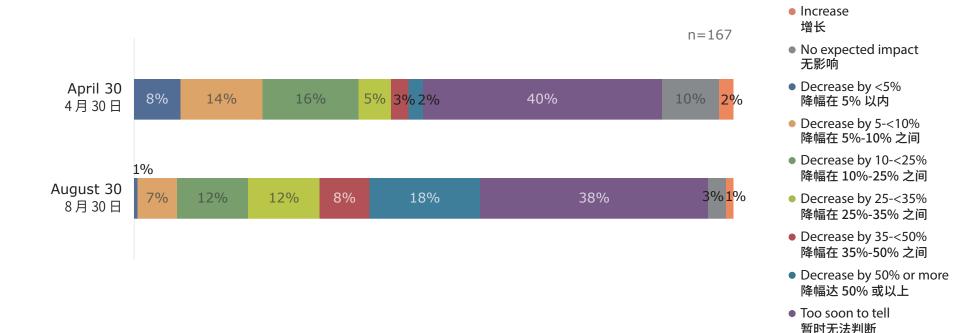
Nearly half of respondents expect 2020 China revenues to decrease if business cannot return to usual before April 30; nearly 1/5 say 2020 revenues will decline more than 50% if the virus epidemic extends through August 30

如果新型冠状病毒肺炎疫情在 4 月 30 日前结束,约半数会员企业预估其在华收入将下降; 如果疫情持续至 8 月 30 日,近五分之一的企业预期收入将下跌一半

Q10 - If the COVID-19 epidemic is resolved and business activity returns to normal by April 30, what impact do you expect it to have on your company's estimated Mainland China 2020 revenues?

如果疫情于4月30日前结束并且业务恢复正常,贵公司2020年在中国大陆的收入将受到怎样的影响?

Q11 - If the COVID-19 epidemic extends through August 30 and business operations still have not returned to normal, what impact do you expect it to have on your company's estimated Mainland China 2020 revenues? 如果疫情持续至8月30日的同时业务运营尚未恢复正常,贵公司2020年在中国大陆的收入将受到怎样的影响?

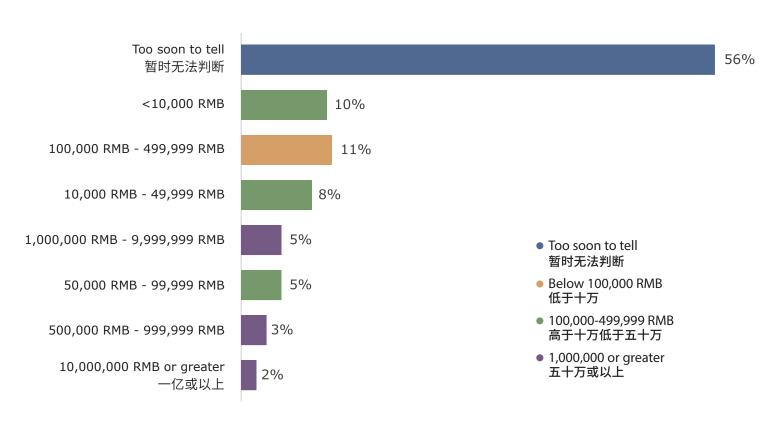


While more than half of respondents say it is too soon to determine the estimated cost of delays, about 10% report they are losing at least half a million RMB per day

尽管过一半的受访者认为现在评估延迟复工导致的成本损失为时尚早,仍有约 10% 的受访者表示每天至少损失 50 万元人民币

Q12 - What's the estimated cost of delay in reopening (or partially operating) your business per day? 延迟复工期间(或部分复工)预计每日的成本(人民币)是多少?

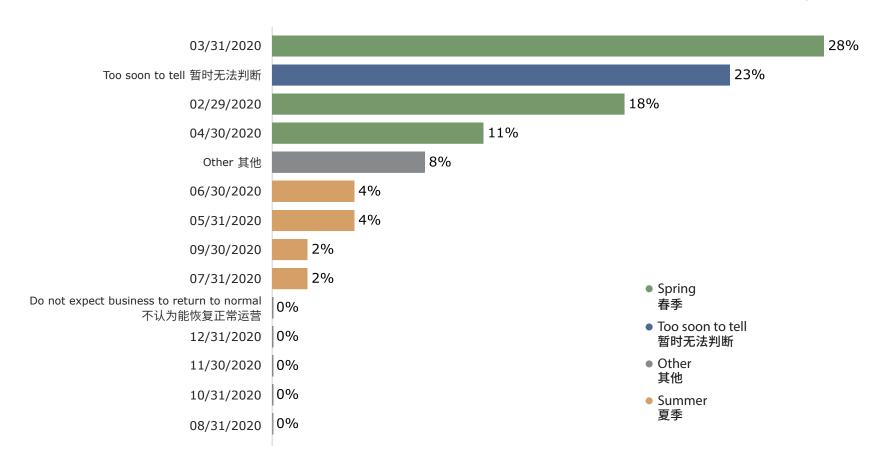




Nearly one-third of respondents expect a return to normal business operations by the end of March; 12% project delays to extend through the summer

近三分之一的受访者预计 3 月底前将恢复正常运营; 12% 的受访者预计至少 要到夏季才能恢复

Q13 - By when do you expect your company's business operations to return to normal? 您预计贵公司何时能恢复正常运营?

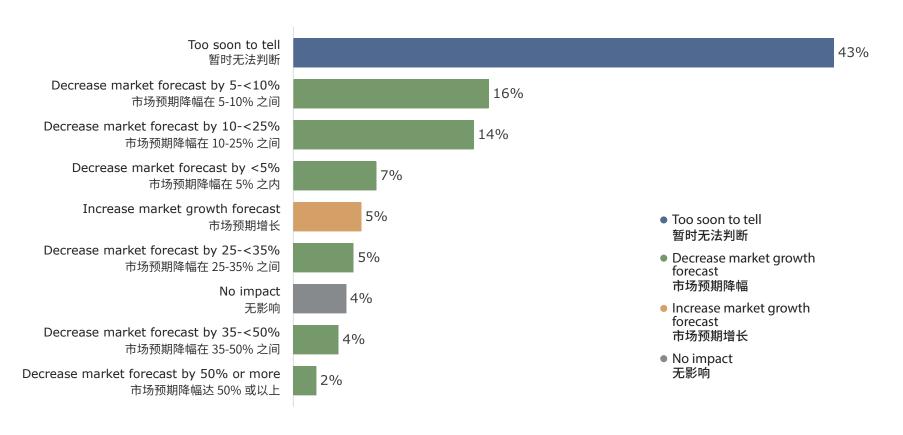


43% of respondents say it is too soon to determine COVID-19's impact on their industry's forecasted 2020 market growth; 48% expect some level of decrease

43%的受访者认为,现在判断新型冠状病毒肺炎疫情对其行业 2020 年预期市场增长的影响还为时过早;48%的受访者预计会出现一定程度的下降

Q14 - What impact will the COVID-19 epidemic have on your industry's forecasted market growth for 2020? 新型冠状病毒肺炎疫情对贵行业2020年预期市场增长有何影响?

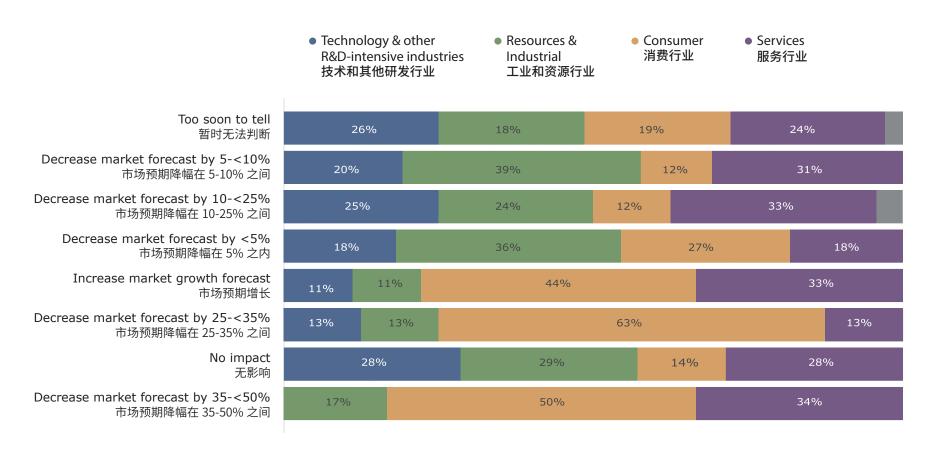




The Consumer industry is most pessimistic about COVID-19's impact on 2020 market growth, representing over 50% of those who expect their market forecast to decrease between 25-50%

受疫情影响,消费行业对 2020 年的预期市场增长最为悲观—超过一半的选择市场降幅在 25%-50% 之间的会员企业来自该行业

Q14 - What impact will the COVID-19 epidemic have on your industry's forecasted market growth for 2020? 新型冠状病毒肺炎疫情对贵行业2020年预期市场增长有何影响?

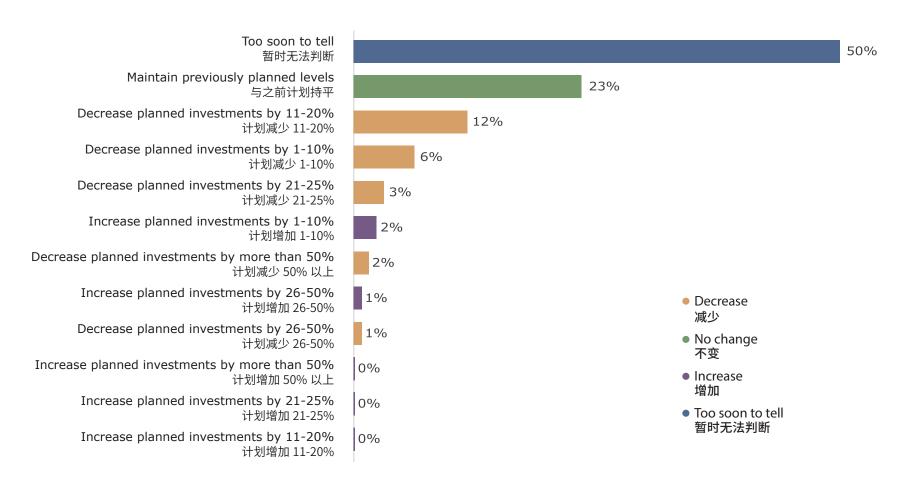


Half of respondents believe it is too soon to determine the impact on planned investments; nearly one-fourth report they will maintain previously planned investment levels

半数受访者认为,现在尚无法判断新型冠状病毒肺炎疫情对其计划投资的影响;近四分之一的企业表示将 维持原有的投资水平

Q15 - To what extent do you expect the COVID-19 epidemic to impact your planned investments in China operations for 2020?

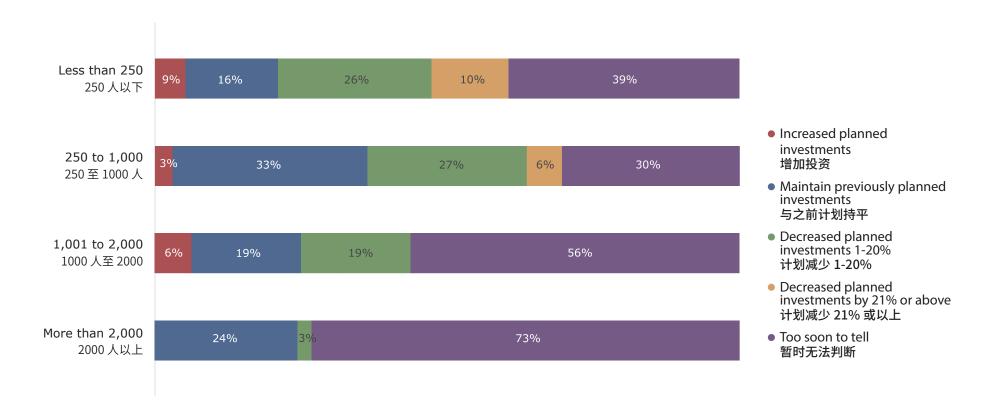
您预计新型冠状病毒肺疫情将在多大程度上影响贵公司2020年计划在华业务的投资?



Roughly 1/3 of companies with fewer than 1000 employees say they will decrease investments, while their larger counterparts say they will maintain their previous investment plans or that it is too soon to determine the impact

将近三分之一的少于 1000 名雇员的会员企业计划减少在华投资,然而绝大多数规模更大的企业认为现在做出, 出相关评估还为时尚早

Q15 - To what extent do you expect the COVID-19 epidemic to impact your planned investments in China operations for 2020? 您预计新型冠状病毒肺疫情将在多大程度上影响贵公司2020年计划在华业务的投资?



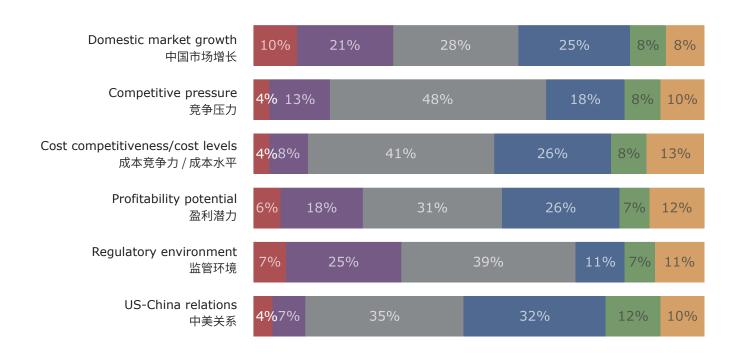
44% say uncertainty around the epidemic has negatively impacted their outlook regarding the bilateral relationship while over one-third maintain optimism toward the regulatory environment

44% 的受访者表示,疫情的不确定性让他们对双边关系感到悲观,但超过三分之一的 受访者表示,他们对疫情爆发期间的监管环境感到乐观

Q16 - How is the uncertainty around the COVID-19 epidemic impacting your two-year business outlook in China on the following aspects?

新型冠状病毒肺炎疫情的不确定性将如何影响贵公司今后两年在以下几方面对中国的展望?

n=165



- Optimistic 乐观
- Slightly optimistic 较为乐观
- Neutral 中立
- Slightly pessimistic 略微悲观
- Pessimistic 悲观
- Too soon to tell 暂时无法判断

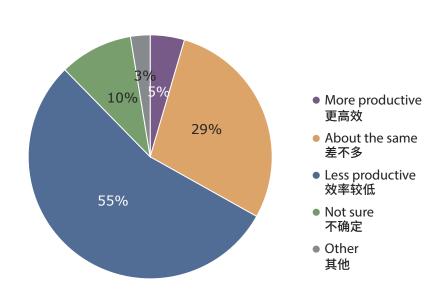
94% of respondents have implemented a work-from-home policy; of those, a majority report decreases in productivity

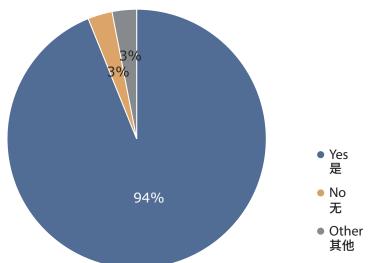
94% 的受访者表示企业采取了在家办公的政策;其中,大多数企业表示在家办公的工作效率有所降低

Q17 - Has your company implemented a "work-from-home" or similar policy because of the COVID-19 epidemic? 贵公司是否因新型冠状病毒肺炎疫情实施了"远程办公"或类似政策?

Q17b - If "Yes," what has the productivity been like compared with working in office? 如果回答"是",与在办公室工作相比,工作效率如何?

n=164

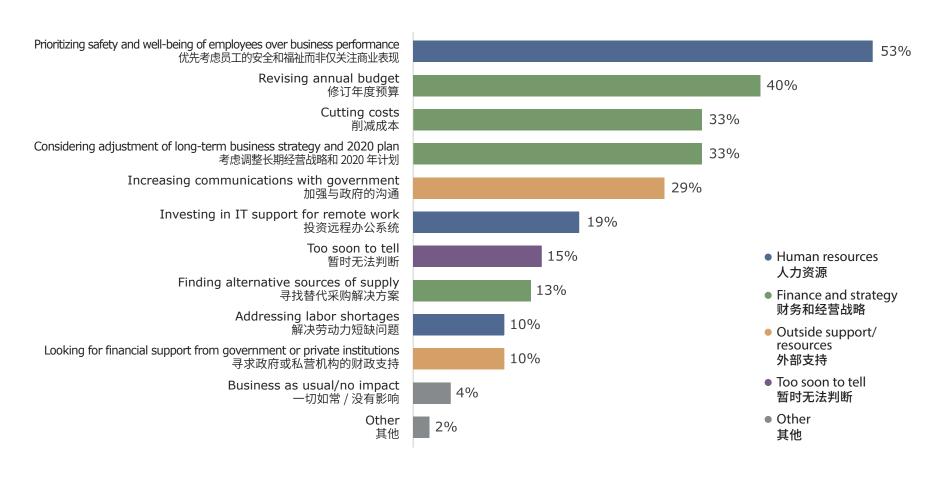




More than half of respondents are prioritizing staff safety over business performance; but respondents are focused on finances too – 40% are revising annual budgets and 33% are cutting costs

超过一半的受访者表示员工安全优先于企业业绩;但他们也在关注财务问题——40%的受访者正在调整年度预算,33%的受访者在削减成本

Q18 - How is the COVID-19 epidemic impacting your short-term (2020) business strategy? (Check all that apply) 新型冠状病毒肺炎疫情对贵公司2020年的短期经营战略有何影响?(请选择所有适用选项)

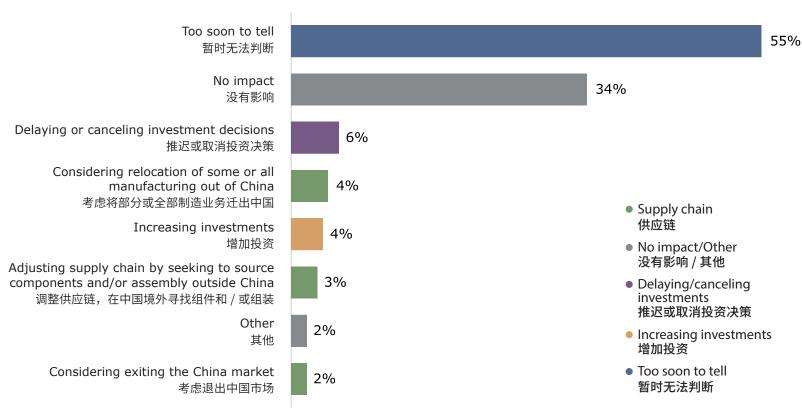


A majority of respondents believe it is too soon to determine COVID-19's impact on their long-term (3-5 year) business strategy; 34% say there will be no impact

大多数受访者认为,现在判断疫情对其企业长期 (3-5 年) 经营战略的影响还为时过早; 34% 的受访者认为不会有影响

Q19 - How is the COVID-19 epidemic impacting your long-term (3-5 year) business strategy? (Check all that apply) 新型冠状病毒肺炎疫情对贵公司长期(三到五年)的经营战略有何影响? (请选择所有适用选项)





More than half of respondents hope the US government will relax travel restrictions into the US; a majority are seeking further information – both on implementation of the Phase I Trade Deal and COVID-19-related business policies

超过一半的受访者希望美国政府放宽入境限制;大多数受访者都期望获取关于中美第一阶段贸易协议实施细则与新型冠状病毒肺炎疫情相关商业政策的进一步信息

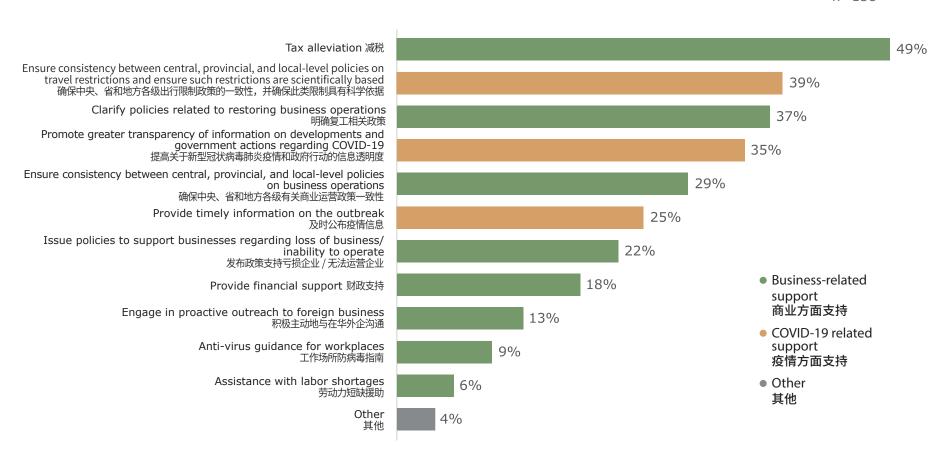
Q20 - What actions can the US government take to help foreign business in China? (Choose up to three) 美国政府可以采取哪些措施帮助在华外企?(最多选择三个选项)

Relax travel restrictions into the US in line with WHO recommendations 55% 根据世卫组织的建议,放宽进入美国的出行限制 Guidance on Phase I trade deal implementation 41% 出台中美第一阶段贸易协定执行指南 Commercial support (e.g., advice on business opportunities, understanding new COVID-19 related business policies) 39% 商业经营支持(例如,提供关于商业机遇的建议、帮助企业更好了解关 干新出台的疫情应对的商业政策) Restore regular visa processing services 36% 恢复常规签证办理服务 Provide more information about US efforts to tackle COVID-19 20% 提供关于美国应对新型冠状病毒肺炎疫情行动的更多信息 Travel to the US 出入美国 Provide a channel for non-US citizen employees holding valid Business-related working visas to return to the US 15% support 为持有有效工作签证的主要非美国公民员工提供返回美国的渠道 商业方面支持 Other COVID-19 related 7% 其他 support 疫情方面支持 Provide more evacuation support for US citizens Other 4% 为美国公民提供更多疏散支持 其他

Nearly half of respondents hope the Chinese government will provide tax alleviation to help foreign business; additionally, over one-third are seeking clear, consistent policies, while 35% ask that transparency be prioritized

近半的受访者希望中国政府能提供税收减免方面的支持;另外超过三分之一的受访企业期盼清晰、一致的 政策,而另外 35% 希望进一步提高透明度

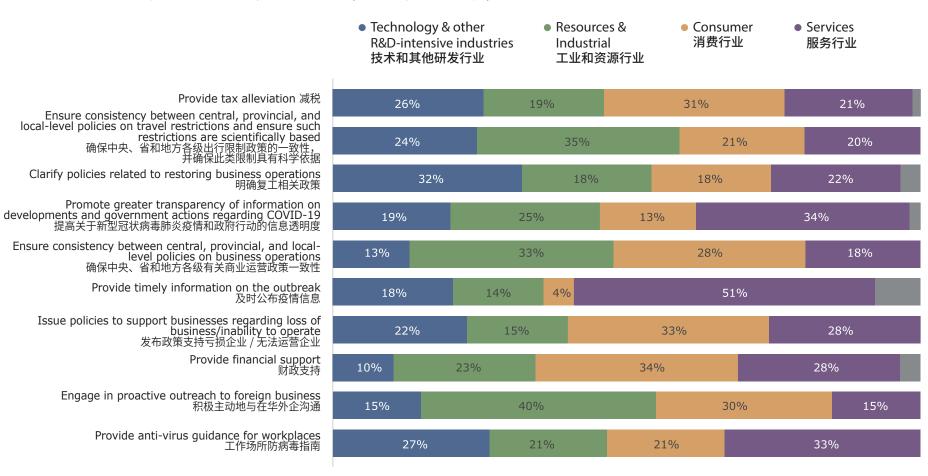
Q21 - What actions can the Chinese government take to help foreign businesses in China? (Choose up to three) 中国政府采取哪些措施能够帮助到在华外企?(最多选择三个选项)



The type of support sought from the Chinese government varies by industry: the Technology sector is seeking clarification of polices related to business resumption, R&I companies want proactive government engagement, Consumer needs strong financial support, and Services welcomes timely feedback related to the outbreak

技术行业尤其希望中国政府能明确复工相关政策;工业和资源行业希望政府能更加积极主动地与外企沟通;相比 而言,消费行业更加重视政府在财政的支持,而服务业则欢迎疫情和政府行动的信息透明度

Q21 - What actions can the Chinese government take to help foreign businesses in China? (Choose up to three) 中国政府采取哪些措施能够帮助到在华外企?(最多选择三个选项)

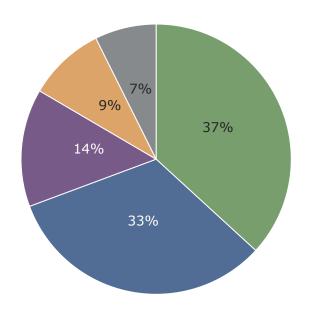


80% have provided some form of assistance to fight the COVID-19 epidemic, with another 14% planning to do so

80% 的受访企业为抗击疫情提供了支持,而另外 14% 表示在计划中

Q22 - Has your company provided assistance to fight the COVID-19 epidemic? (Check all that apply) 贵公司是否为抗击新型冠状病毒肺炎疫情提供了支持?

n=119



- Yes, via monetary donations to Hubei province and/or other affected areas
 是,向湖北省和/或其他疫区捐款
- Yes, via in-kind donations to Hubei Province and/or other affected areas
 是,向湖北省和/或其他疫区提供 实物捐助
- Yes, by providing technical expertise and/or personnel to Hubei and other affected areas 是,向湖北和其他疫区提供技术专 业知识和/或人员支持
- Not yet, but planning to do so 还没有,但计划提供支持
- Other 其他