

RESULTS 结论:

WFSGI Pulse Survey- Covid-19 Impact on Sporting Goods Industry & Key Market Trends

WFSGI反馈调研：疫情对体育用品行业的影响及重要市场趋势

October 2020 2020年10月



PRELIMINARY INFORMATION

初步资料



- WFSGI is conducting a confidential monthly pulse survey of sporting goods companies to obtain general information related to COVID-19's impact on their business and the steps they are taking to mitigate this. In return, the industry will get access to a monthly anonymous report with the consolidated results of this industry exercise.
- WFSGI正每月对体育用品公司进行一次匿名的反馈调查，以获取与疫情对其业务的影响相关的基础信息，以及他们正在采取的应对措施。作为回报，我们将为行业出具一份月度匿名报告，其中包含行业活动的综合结果。

PRELIMINARY INFORMATION

初步资料



- The reports will aim to: Uncover the true global impact of COVID-19 on the Industry, provide key insights on the actions of Industry leaders to manage the crisis, and track the key trends of the Sporting Goods Industry as the world progresses through the COVID-19 lockdown and the easing of restrictions into the ‘new normal’. The survey is intentionally divided into specific questions for manufacturers and for brands/retailers to ensure that we are able to track trends throughout the supply chain.
- 这些报告的目的是：揭露疫情对行业的真正全球影响；提供行业领导者应对危机举措的关键见解；随着全球应对疫情采取的封锁、放宽限制到进入“新常态”，梳理体育用品行业的关键趋势。调研特别设计了针对制造商和品牌/零售商的具体问题，以确保我们能够追踪整个供应链的趋势。



1. SPORTING GOODS MANUFACTURING COMPANIES

体育用品制造企业



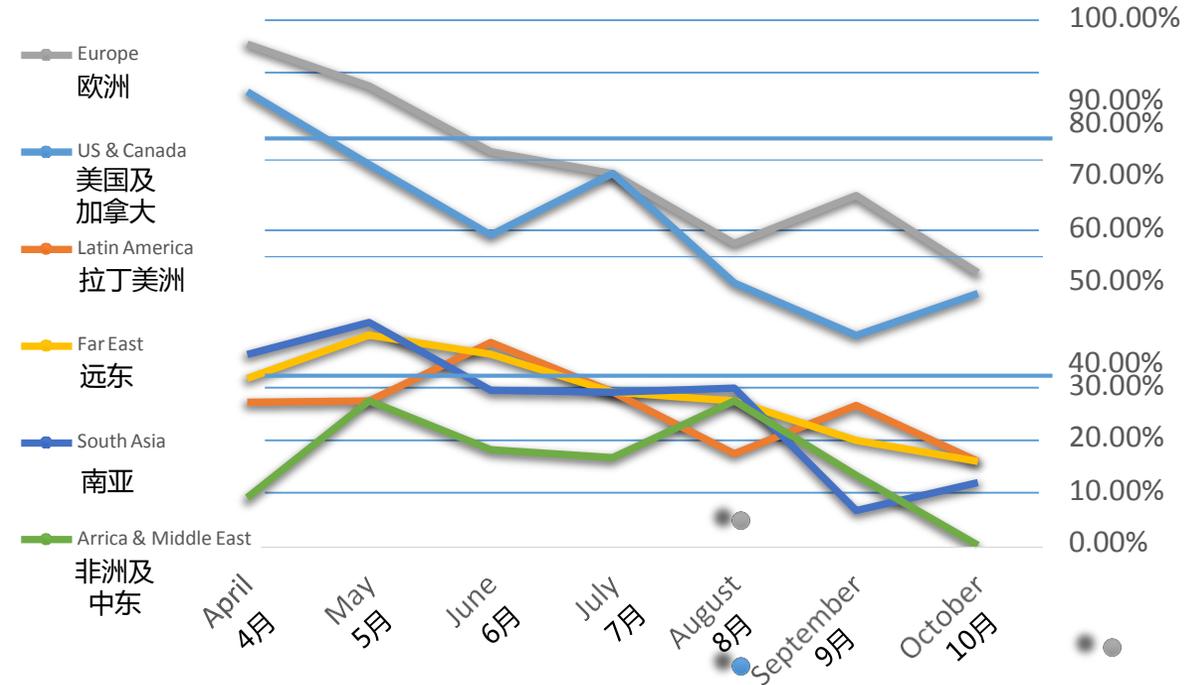
DEMAND: Decreasing Orders from Northern America

需求：来自北美地区的订单量减少



- For 28% of respondents orders did not decrease, that's 8% more than last month.
- 28%的受访者表示没有面临订单减少的情况，这一比例较上个月结果提高了8%。
- The situation has improved for most regions except for Northern America and South Asia.
- 除北美和南亚外，大部分地区的情况有所好转。
- The sharpest drop has been recorded for Europe from where close to 20% less face order decrease.
- 反馈欧洲订单减少的人数下降了近20%，创下了最大的降幅。

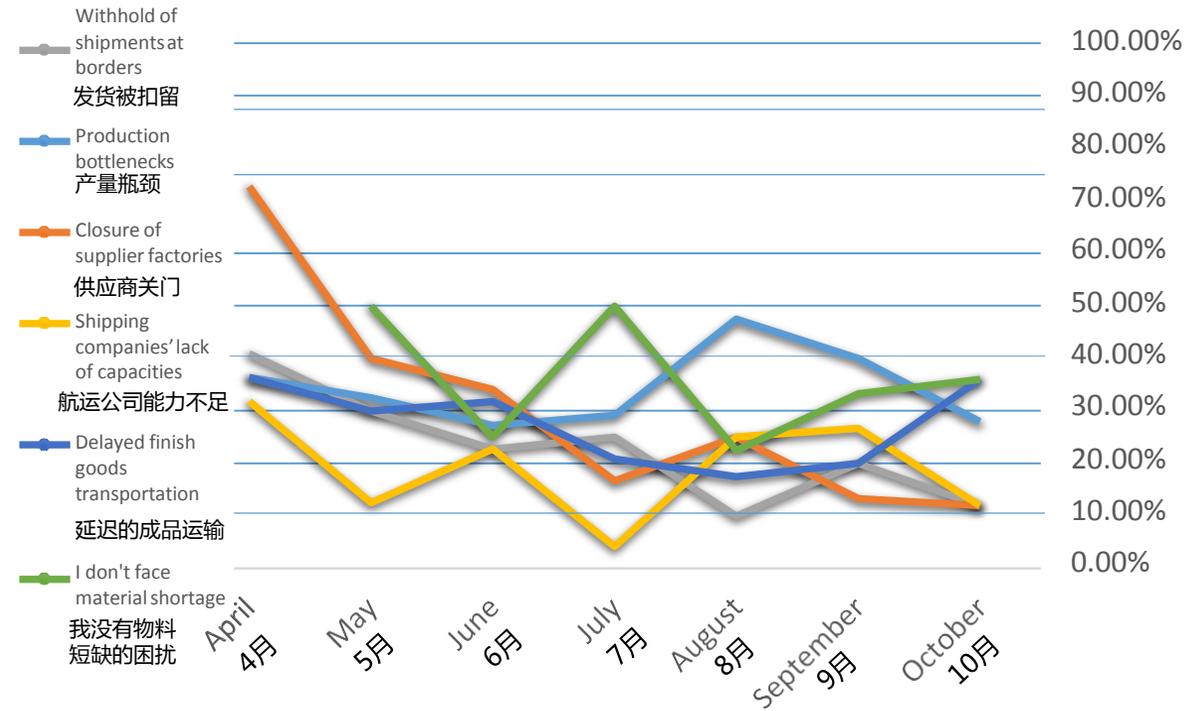
因订单减少受损的区域是 Where have you seen decreasing orders from:



物流：物料短缺主要是由成品运输延误造成的

- 36% of respondents don't face material shortage that's a slight improvement compared to last month.
- 36%的受访者表示没有面临物料短缺的情况，这一数据表明情况较上个月有所好转。
- For the first time since the initiation of the survey, delayed finish goods transportation is the main reason for material shortage.
- 自调研开始以来，成品运输延误首次成为造成物料短缺的主要原因。
- All other reasons for material shortage have experienced a decline this month.
- 其他所有导致物料短缺的原因在本月的选择中都呈下降趋势。

物料短缺的原因是 Are you facing material shortage due to:



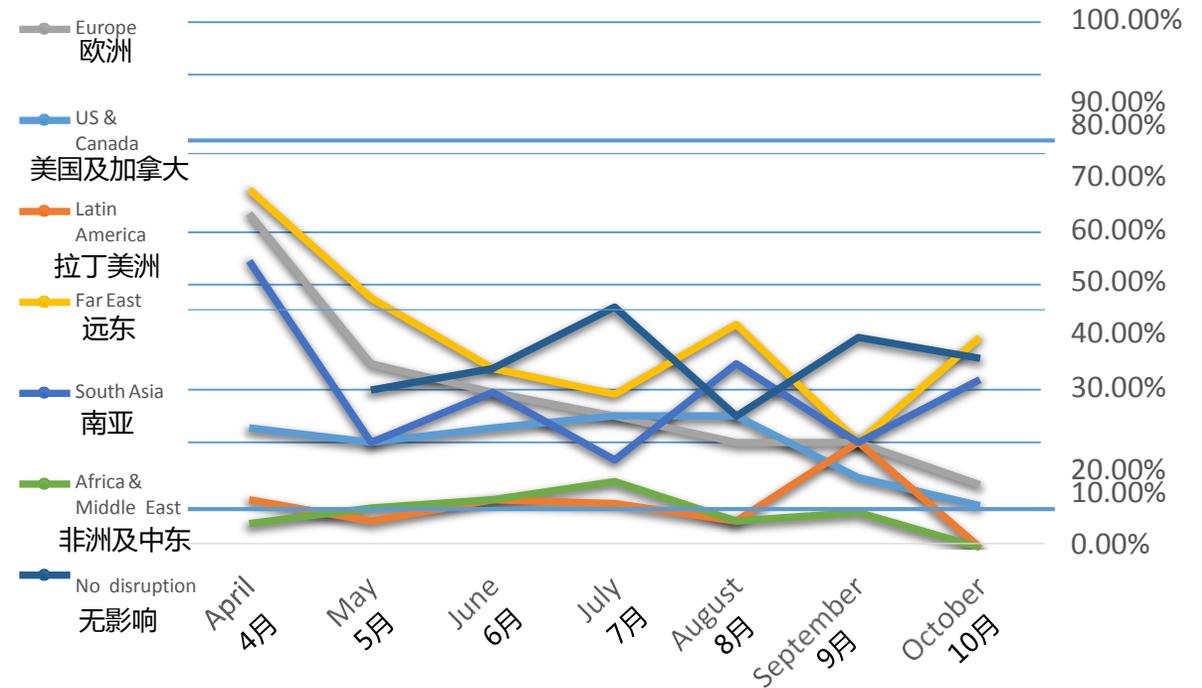
SUPPLY: Strong Shift of Concerns Regarding Supply from South Asia and Far East

供应：对南亚和远东地区供应的担忧发生了重大改变



- The number of industry players facing supply chain disruption has slightly increased to 64% this month.
- 本月，面临供应链中断的行业参与者数量已小幅上升至64%。
- Supply from South Asia and Far East has been increasingly disrupted compared to last month.
- 南亚和远东地区的供应受干扰情况较上个月有所恶化。
- For all other regions a positive development has been recorded as the supply disruption has decreased there.
- 对于其他所有区域来说，供应中断情况逐渐减少，出现了积极的发展态势。

受供应链中断影响的区域是 In which regions do you see your supply chain disrupted:



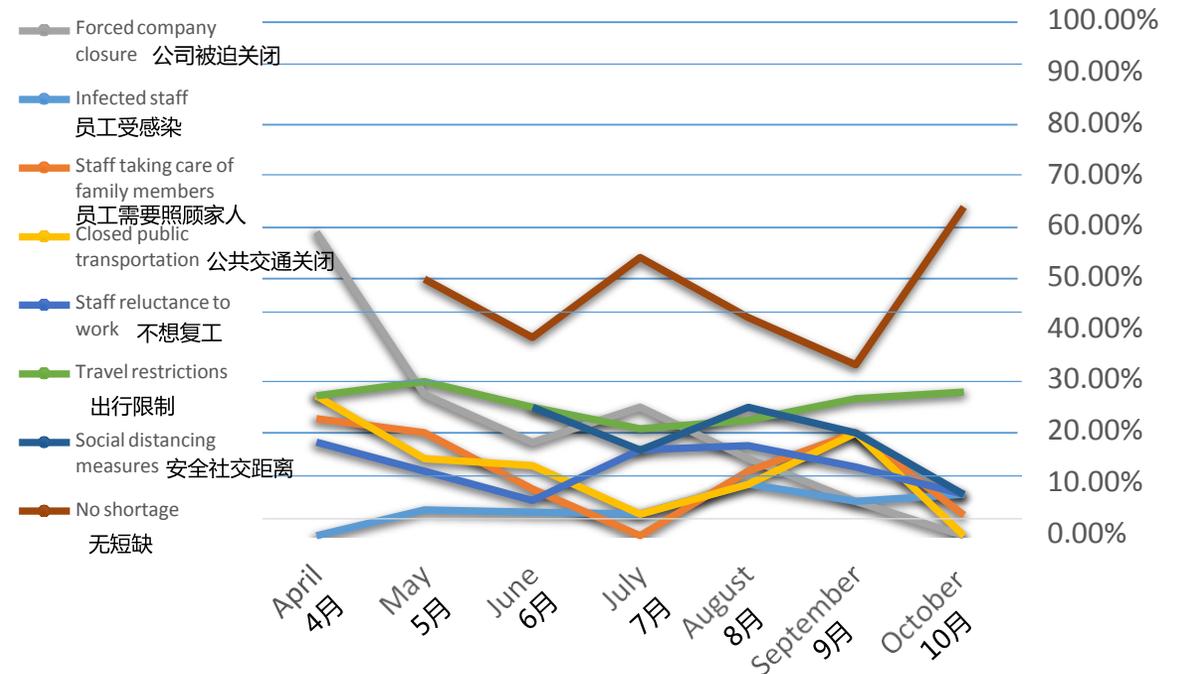
LABOR: Only a Little More than one Third Face Shortage

劳工：仅有略高于1/3的人面临劳动力短缺



- Over 60% are no longer confronted with labor shortage. That's nearly double as many as last month and especially the absolute most promising result since the initiation of the survey.
- 超过60%的人不再面临劳动力短缺的问题。这一数字几乎是上个月的两倍，绝对是调研开始以来最有希望的结果。
- Travel restriction remain constantly an issue for around 30% of respondents.
- 约有30%的受访者一直存在出行限制的问题。
- All other issues causing labor shortage have seen a drop in importance for the industry.
- 所有其他导致劳动力短缺的因素对该行业的重要性都有所下降。

劳工短缺的原因是 Are you confronted with shortage of labors due to:



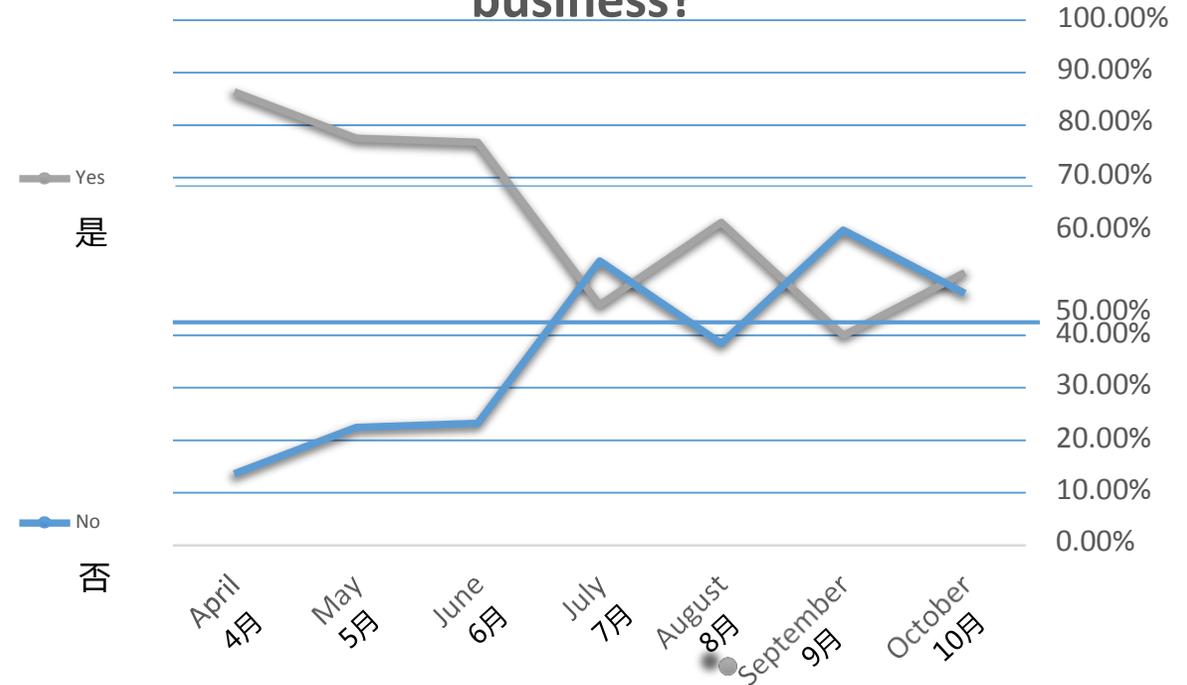
LEGAL: Alternating Trend Ongoing since Summer

法律：自夏季开始，交替趋势持续



- A clear trend is detected since the summer: there is an alternating very low difference between sporting goods members being impacted by legal requirements or not. This month 4% more respondents consider themselves being impacted by regulatory measures.
- 自今年夏天以来，我们发现了一个明显的趋势：体育用品行业受到法律措施影响与否之间的差异非常小，且持续交替。本月认为自己受到监管措施影响的受访者比例比选择没有的人多4%。

当地政府的疫情监管要求对您的业务有影响吗？
Do Covid-19 regulatory requirements from local government impact your business?



FINANCE: Evenly Divided Results Since Summer

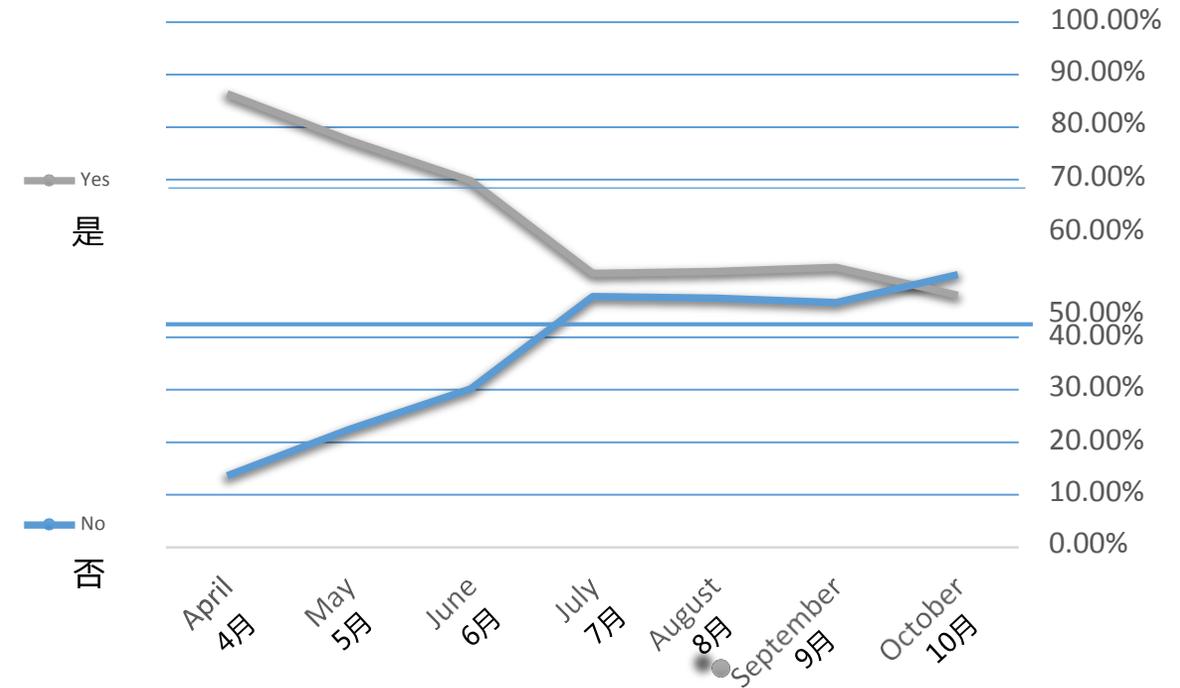
财务：自夏季以来，结果平分秋色



- Since July it is the first time that 4% more respondents are forced to handle cash flow issues.
- 自7月以来，面临现金流问题的受访者数量首次比没有的多4%。
- However, there is a clear trend showing since the last summer that the industry is nearly equally divided in a part having cash flow issues and one without such challenges.
- 然而，自夏天以来，有一个明显的趋势表明，行业几乎是一分为二，一部分存在现金流问题，另一部分没有困扰。

您是否面临着现金流不足的问题？

Are you facing challenges caused by low cash flow during this situation?



BUSINESS FORECASTING: No More Expectations for Business Drop of over 60%

业务预测：不再预测业务下滑程度超过60%

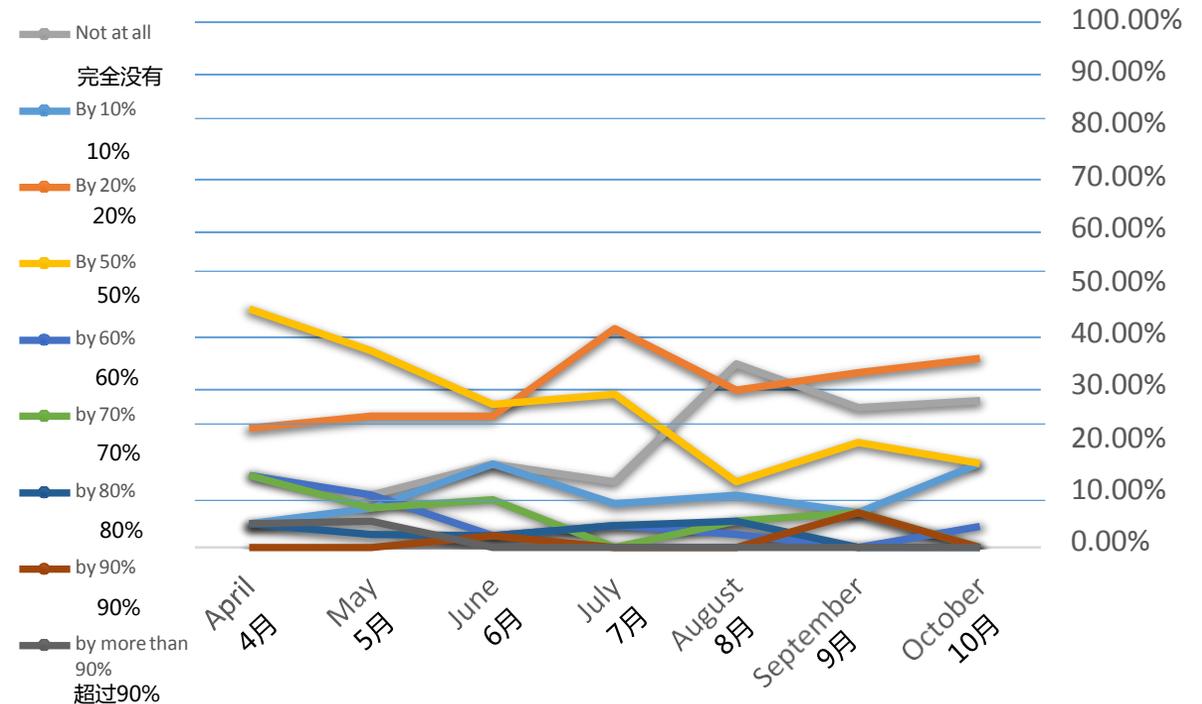


- Compared to last month, the number of respondents predicting that their sales will drop remains stable at around 70%.
- 与上个月相比，预计销售额将下降的受访者人数仍稳定在70%左右。
- Most respondents see a business drop by 20% (36% of respondents) and a decline of 50% or 10% (20% of respondents).
- 大多数受访者认为业务下降了20%（36%的受访者）和50%或10%（20%的受访者）。
- While 4% expect a decline of 60% or more, it is positive to note that nobody predicted a drop of more than 60%.
- 尽管有4%的人预测降幅在60%以上，但值得肯定的是，没有人预测降幅会超过60%。
- The most affected region remains Europe where 60% of respondents see their business drop. Followed by Northern America with 56%.
- 受影响最严重的地区仍然是欧洲，60%的受访者认为他们的业务量有所下降。其次是北美，占比56%。

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您认为业务会在下月下降么？

Do you see your business dropping in the upcoming month:



BUSINESS FORECAST: Slightly Less Pessimistic Outlook

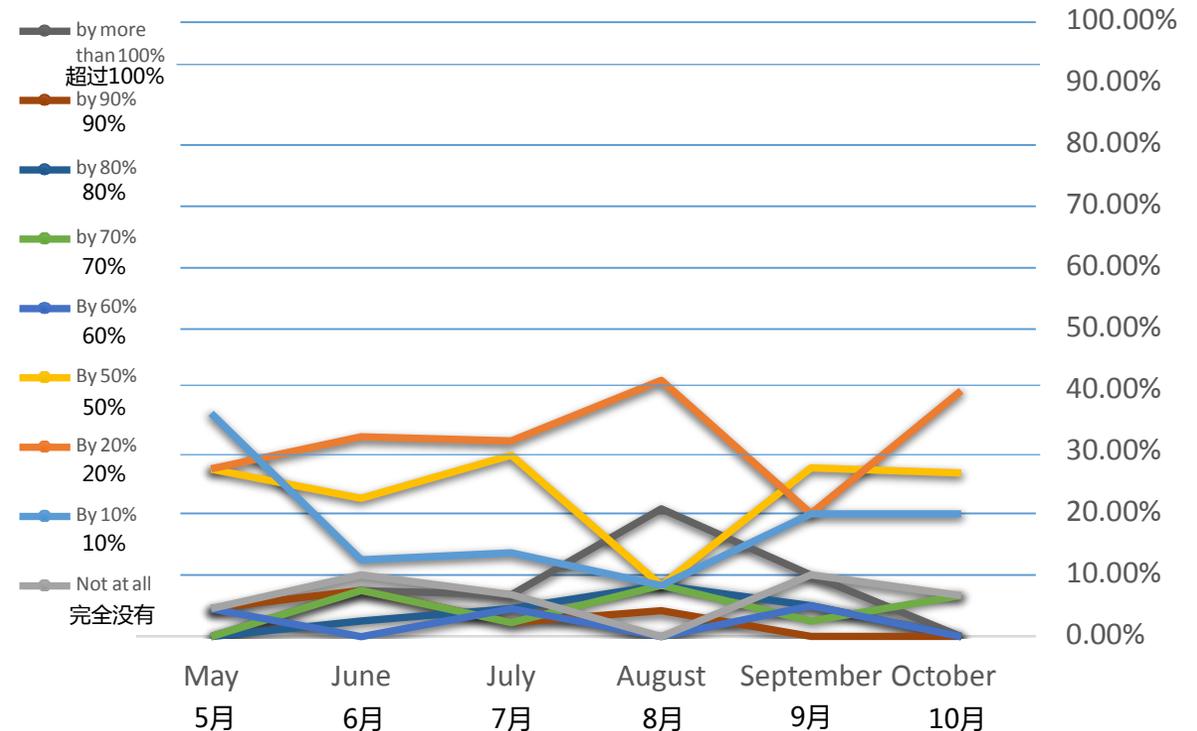
商业预测：悲观前景稍有改善



- Only 4% of respondents don't expect any rebound of their business at all this month.
- 本月，只有4%的受访者认为他们的业务根本不会恢复。
- Most respondents expect a recovery of 20%; followed by a recovery of 50% and 10%.
- 大多数受访者预计复苏比例为20%；其次是50%和10%。
- Since the summer months, it's the first time that some respondents expect business recovery of 70% and above.
- 自夏季以来，首次有受访者预计业务将恢复70%以上。
- With regard to the time frame necessary for the recovery, a stable 44% think that their business will need more than one year (which does not deviate from the trend over the past months).
- 关于复苏所需的时间范围，有44%的人认为他们的业务需要一年以上的恢复期（这与过去几个月的趋势并无偏差）。

您认为疫情结束后，经济会复苏么？

Do you foresee the business rebound after the pandemic?



MEASURES TAKEN: Over 95% Have a Plan to Sustain Operations

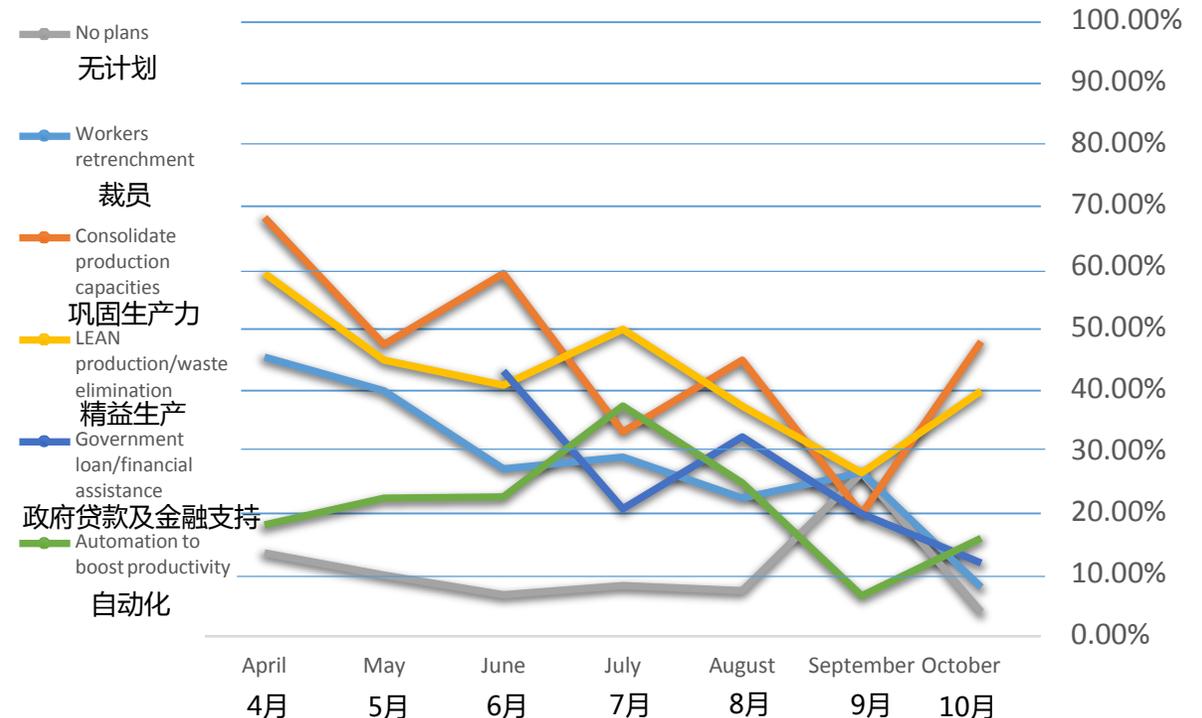
所采取的措施：超过95%的公司有维持运营的计划



- Only 4% have no plans to sustain operations. That's a significant drop compared to last month when 27% had no plans.
- 只有4%的企业没有维持运营的计划。这与上个月的27%相比有显著下降。
- There is a sharp increase of companies consolidating production, close to 30%.
- 选择巩固生产力的公司数量急剧增加，增幅接近30%。
- 40% of respondents are focusing on lean production.
- 40%的受访者关注精益生产。

您计划通过什么方法维持经营？

What would be your ideas to plan to sustain your operations?





2. RESPONSES SPORTING GOOD BRANDS AND RETAILERS 体育用品品牌及零售商反馈



IMPACT MITIGATION: Unchanged High Support for Increasing Online Sales

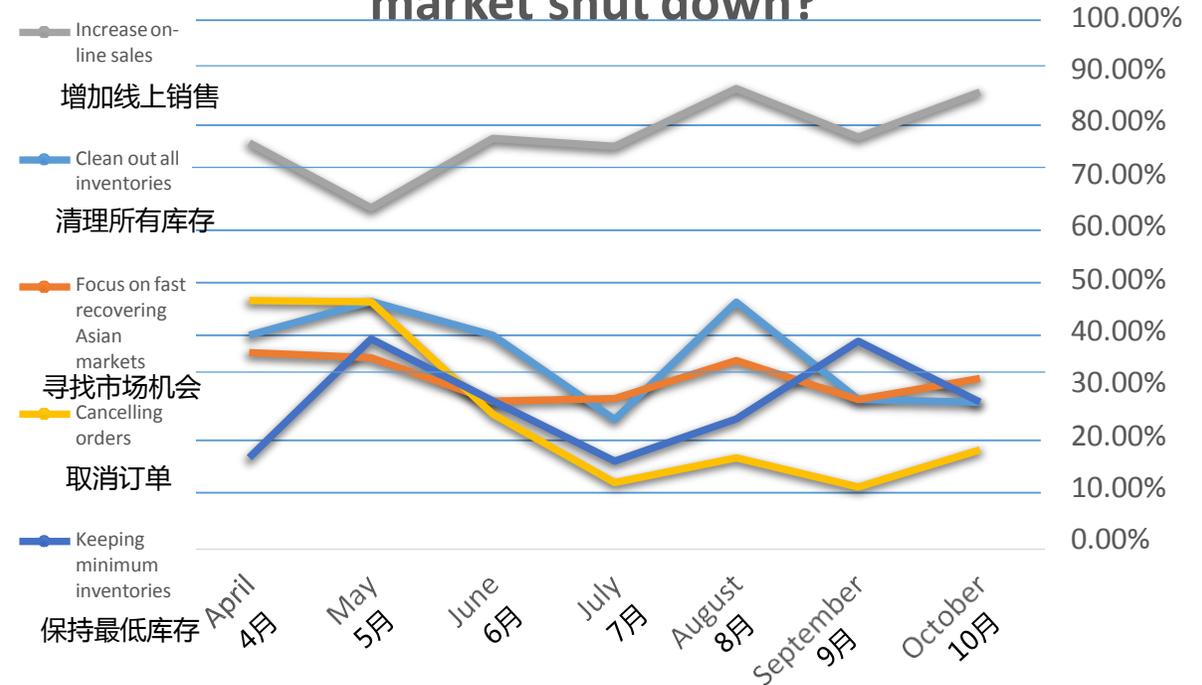
减轻影响：“增加线上销售”这一选项占比一直很高



- Increasing online sales is back on top of the options chosen with a surpassing support of close to 90% of respondents.
- 在近9成受访者的支持下，增加线上销售再次成为大家的首选。
- All other strategies are this month a tiny little bit more considered by respondents, except keeping a minimum inventory which has been chosen by over 10% less this time.
- 本月，除保持最低库存这一选项的支持率下降超过10%外，选择其他选项的人数都有些微增长。

您会采取什么策略来减轻市场关闭带来的巨大影响？

What would your strategy be to mitigate the sharp impact from the market shut down?



REPERCUSSION: Sharp Decline of Consolidating the Supply Base

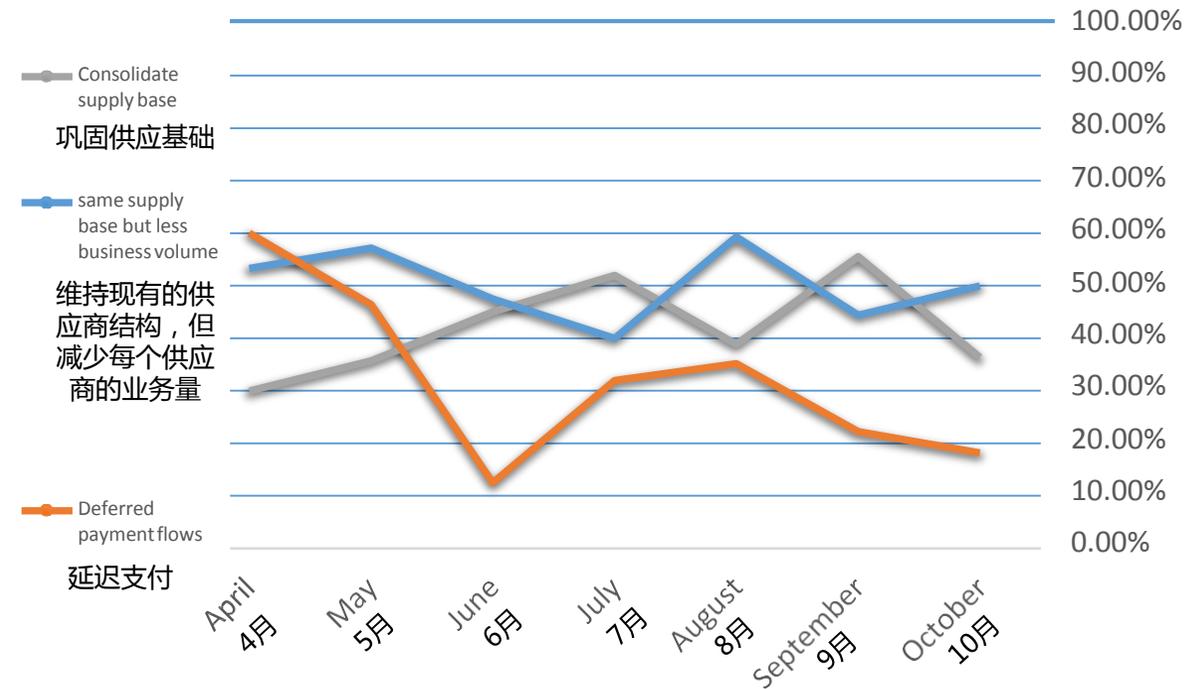
后果：选择整合供应链的人数锐减



- Since June, every month the top position of the most chosen repercussion has changed between consolidating the supply base and keeping the supply base but attributing less orders to each supplier.
- 自6月开始，每个月最受欢迎的选项不是“整合供应链”就是“维持现有的供应商结构，但减少每个供应商的业务量”。
- Deferring payment flows is furthermore losing support since August.
- 自8月开始，延迟支付选项进一步失去了支持。

缓解策略对供应商有何影响？

What would be the repercussion of the mitigation strategies to the suppliers?



PRIORITIES: Equal Importance of Cash Position and Employees Health

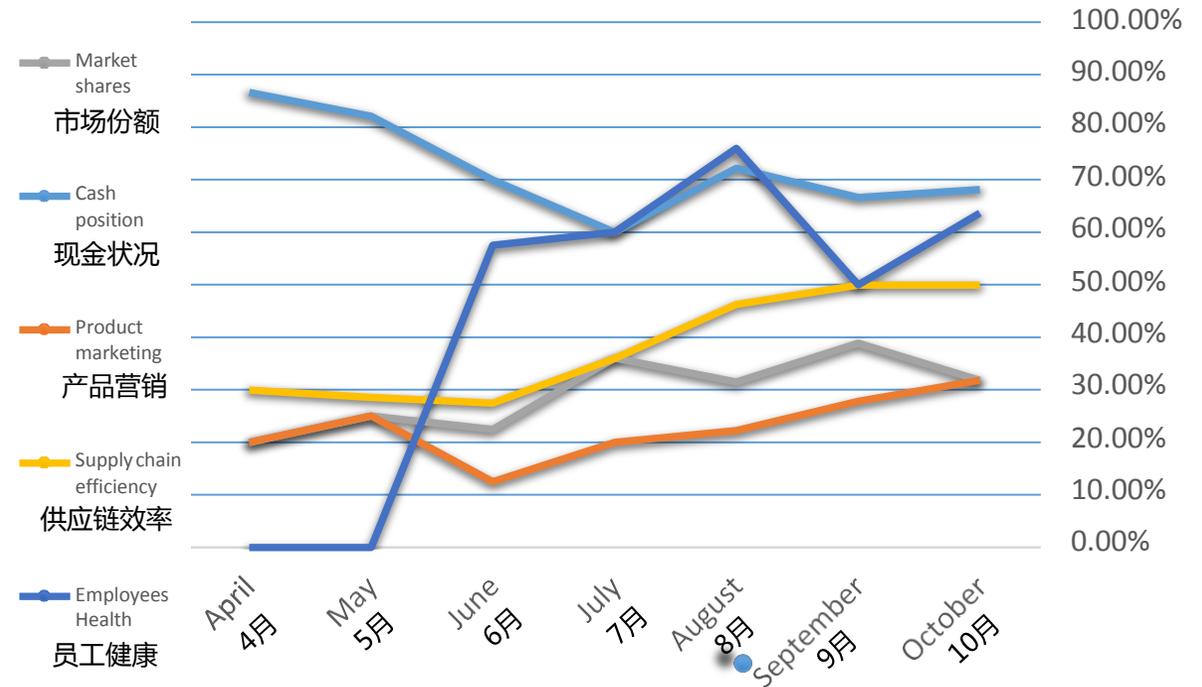
侧重点：现金状况和员工健康均受到重视



- Cash position and employees health are topping the list with over 60% of respondents setting these priorities.
- 现金状况和员工健康状况位居榜首，超过60%的受访者做出了这一选择。
- Supply chain efficiency has gained for the first time 50% of votes from respondents.
- 供应链效率首次获得半数受访者的支持。

在这个困难时期，您的侧重点是？

What would your priorities be during this difficult period?



EXPECTATIONS TO SUPPLIERS: Flexibility of Undisputed Importance

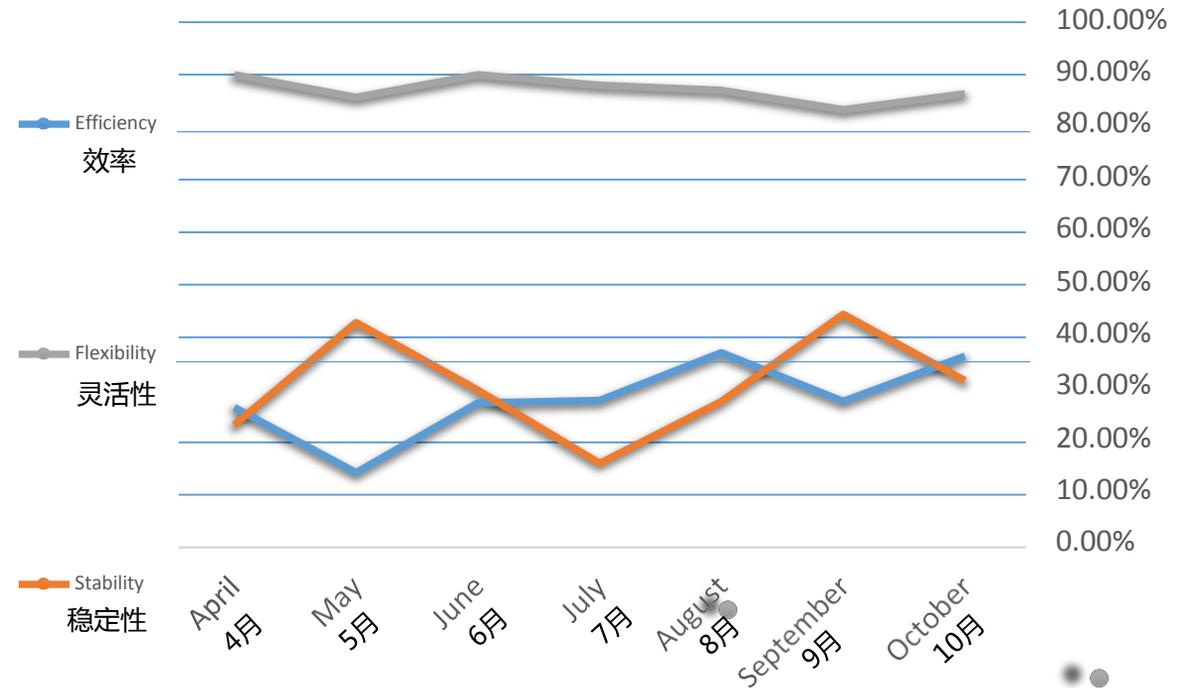
对供应商的期望：灵活性的的重要性毋庸置疑



- With over 80% of respondents expecting flexibility of suppliers, this option remains throughout the year the most important answer provided.
- 由于超过80%的受访者都希望供应商具有灵活性，因此这一选项在全年都是至关重要的。
- Efficiency and stability have changed position but remain nearly equally important with around 35% of respondents' support.
- 效率和稳定性交换了排序，但几乎仍然同等重要，均受到了35%的受访者的支持。

在这个困难时期，您对供应商的期望是？

What would be your expectations to suppliers during this difficult period?



SUPPLY CHAIN TRANSFORMATION: No Transformation is Not an Option

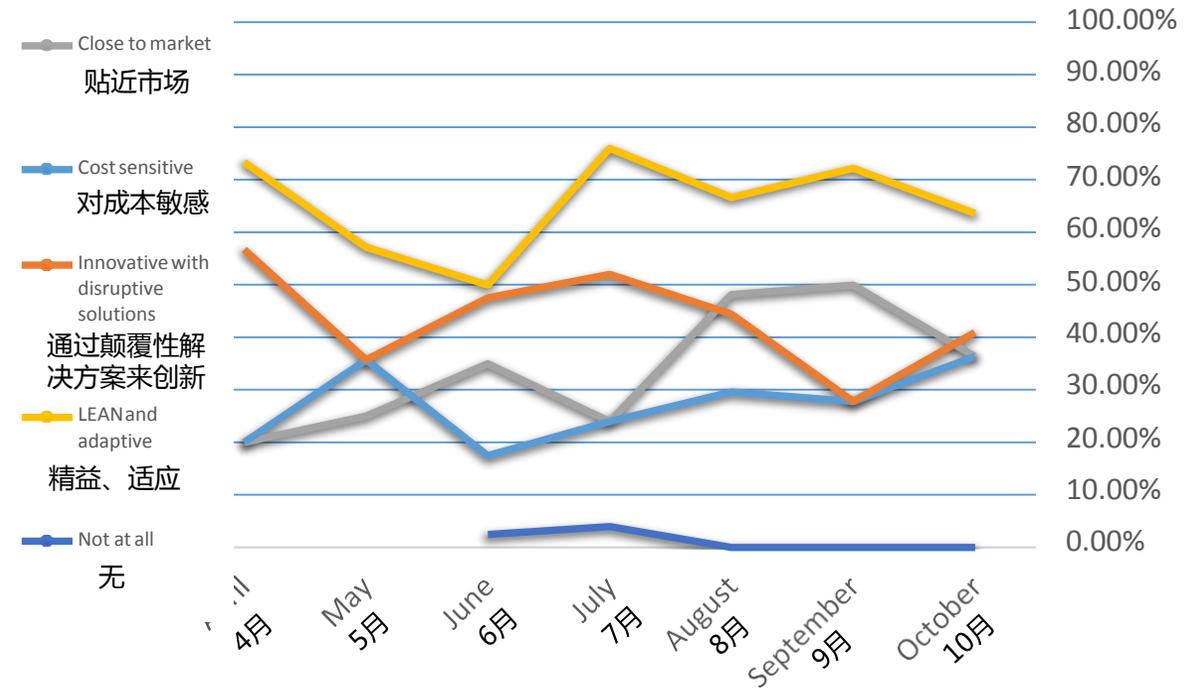
供应链转型：没人考虑不转型



- For the third consecutive month all participating industry players do not plan to keep their supply chain unchanged.
- 连续第三个月，所有受访者均不打算保持其供应链结构不变。
- Lean and adaptive supply chain transformation is remaining the most attractive solution with over 60% consent from respondents.
- 精益和适应性供应链转型仍然是最具吸引力的解决方案，超过60%的受访者支持这一选择。
- Being close to the market, innovation and cost sensitivity are dead even around 40%.
- 贴近市场、创新和对成本敏感的占比均高达40%。

疫情结束后，您希望供应链如何转型？

How would you like your supply chains be transformed after the pandemic?



SOURCING PRIORITIES: Regional Sourcing Gaining Ground

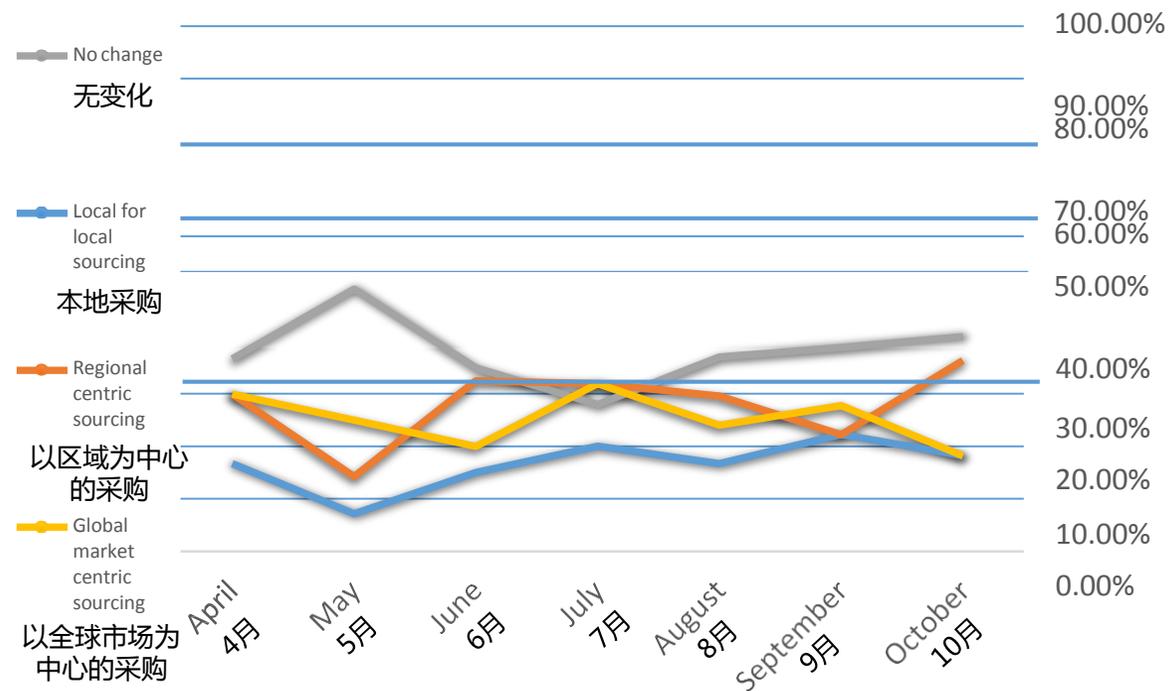
采购优先顺序：区域性采购备受关注



- The trend continues upwards for respondents who are not reframing their sourcing priorities at all (over 40%).
- 超过40%的受访者根本没有重新规划采购优先顺序，这一趋势仍在继续上升。
- Regional centric sourcing is gaining ground with the consent of over 36%.
- 以区域为中心的采购获得了36%以上的受访者支持。
- Local to local and global market centric sourcing are both only selected by a little less than 20%.
- 本地到本地和以全球市场为中心的采购的占比都只有不到20%。

疫情结束后，您的采购重点是？

How do you want to reframe your sourcing priorities after the pandemic?



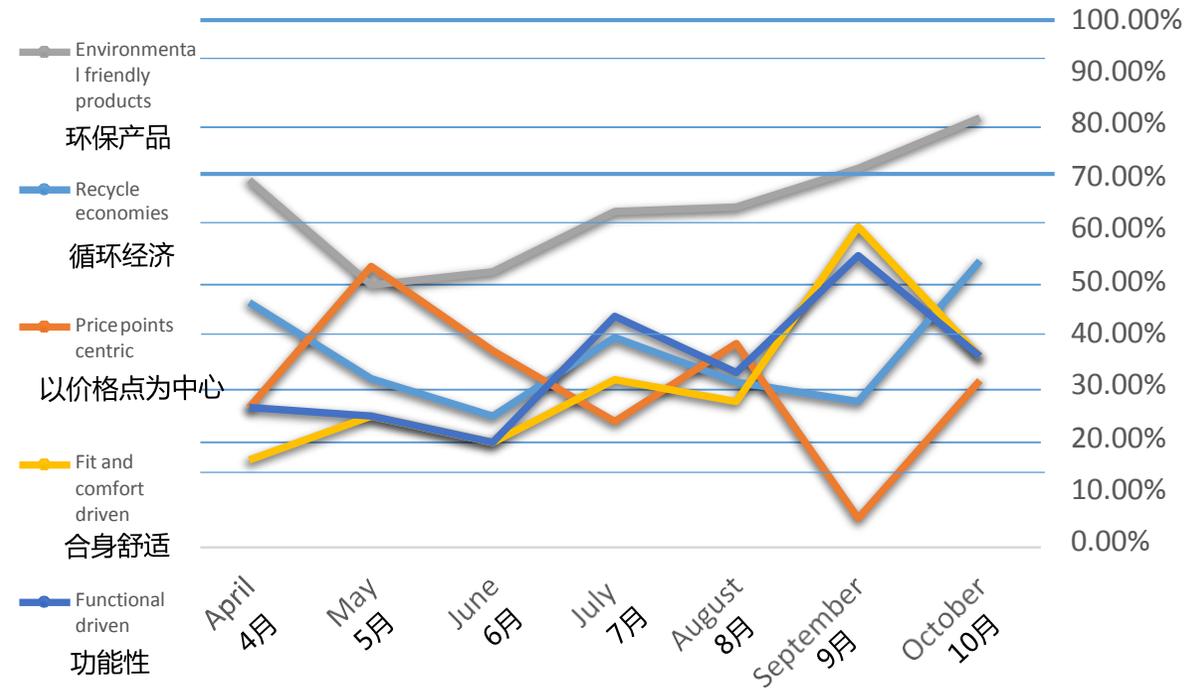
MARKET TRENDS: Environmentally Friendly Products Ahead of the Rest

市场趋势：环保产品遥遥领先



- Since May environmentally friendly products is increasingly getting support with over 80% of participants choosing that trend this month.
- 自5月开始，越来越多的人支持环保产品，本月有超过80%的受访者做出了这一选择。
- The trends price points centric and recycle economies have gained over 20% of votes.
- 以价格点为中心和循环经济两个选项分别获得了超过20%的增长。
- On the other side fit, comfort and functional driven trends have lost significant support.
- 另一方面，合身舒适和功能驱动的趋势出现了下降，支持率不足50%。

疫情结束后，新兴市场的趋势是？ What would be the emerging market trends after the pandemic?



PREVAILING SPORTS AFTER THE PANDEMIC: Outdoor and Running go Head to Head

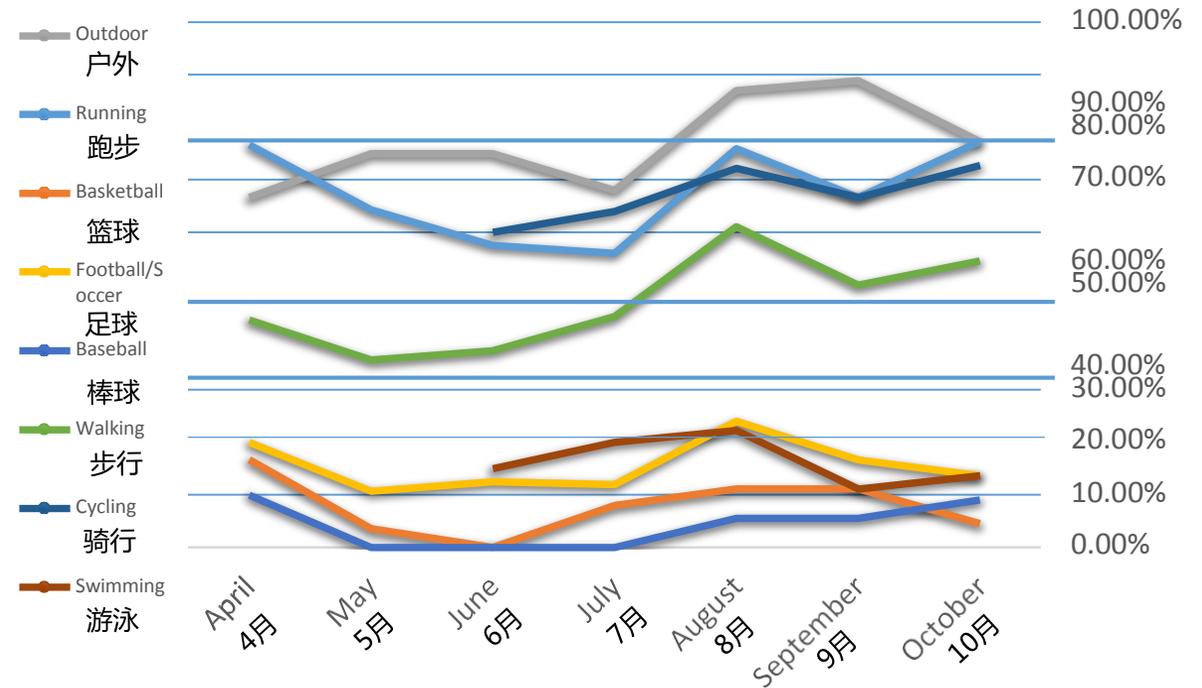
疫情后的流行运动：户外运动和跑步并驾齐驱



- Running is for the first time since May as important as Outdoor with close to 80%.
- 自5月以来，跑步首次变得与户外运动同等重要，占比接近80%。
- Cycling is just getting 5% less votes and Walking is still chosen by close to 55% of respondents.
- 骑行运动紧随其后，支持率较上述两种活动的占比仅低了5%，有近55%的受访者选择步行。
- After these sports there is a huge gap and all other sports are meant to prevail after the pandemic for less than 15% of survey participants.
- 上述运动与其他项目拉开了巨大的差距，支持率均不足15%。

您认为疫情结束后，哪种运动将受欢迎？

In your view, which product categories will prevail after the pandemic



NEXT SURVEY November 2020 下次调研 – 2020年11月



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Please contact us at any time!

在这个困难时期我们能为你做些什么？请随时与我们联系！

[**covid19support@wfsgi.org**](mailto:covid19support@wfsgi.org)

KEEP SAFE & HEALTHY 保重

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