

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

September 2020 2020年9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



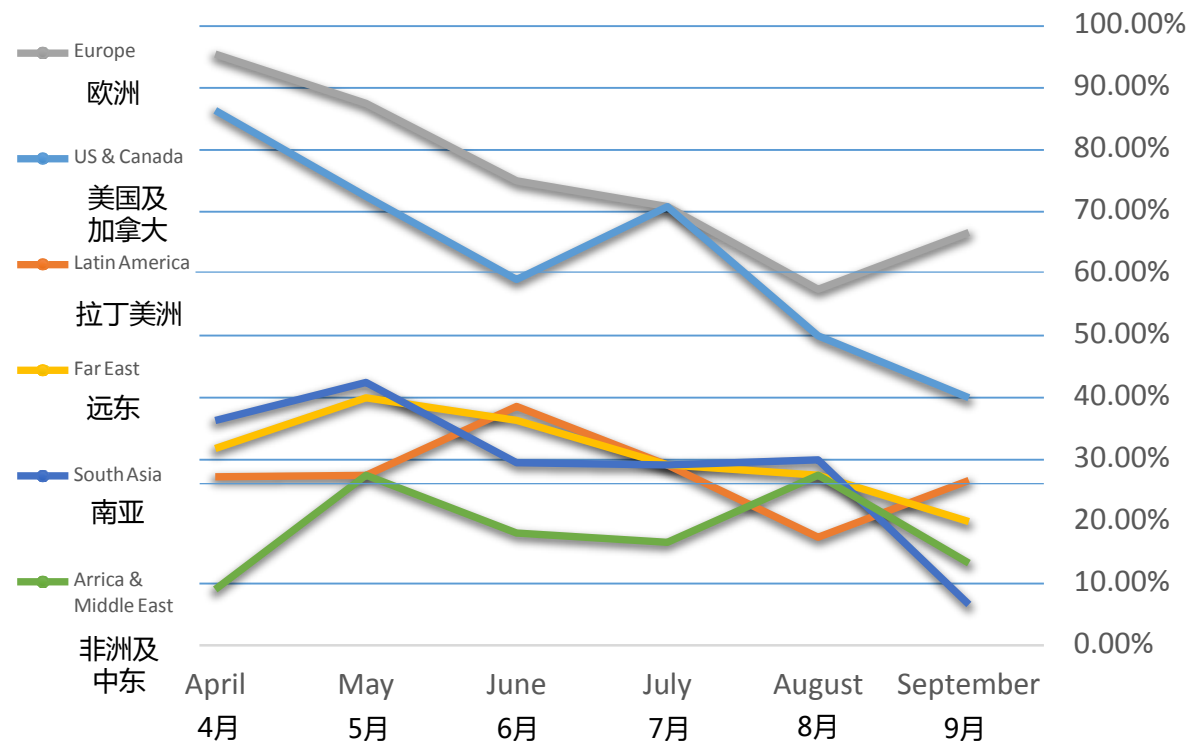
DEMAND: Decreasing orders - Europe tops the list

需求：订单减少-欧洲位居榜首



- 20% are not seeing any decreasing order, these are 5% less than last month.
- 20%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降低了5%。
- Close to 70% face order decrease from Europe that is an increase compared to last month.
- 近70%的受访者反馈了欧洲订单减少的情况，该数据较上个月有所增加。
- Beside Europe, there is only a decrease of orders seen in Africa & the Middle East region.
- 除欧洲外，非洲和中东地区的订单也在减少。
- For all other regions, participants indicate that there are less decreasing order than last month.
- 对于所有其他地区，受访者表示订单减少的情况较上个月有所好转。

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



LOGISTICS: Production bottlenecks provoke material shortage

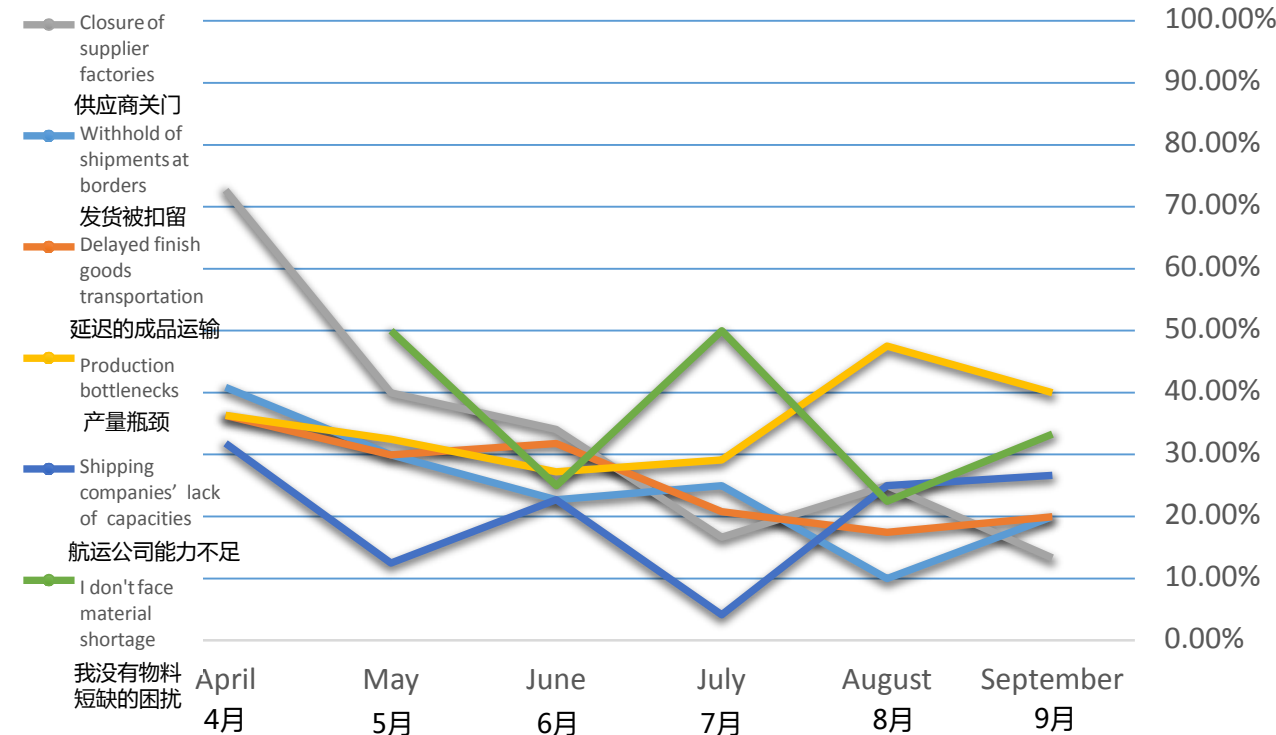
物流：生产瓶颈引发材料短缺



- Still a little over 30% of respondents face material shortage.
- 仍有略高于30%的受访者面临物料短缺。
- Production bottlenecks are the most chosen reason for material shortage (40%).
- 生产瓶颈是造成材料短缺的最主要原因（40%）。
- Closure of supplier factories is less of an issue but double as many respondents see their shipments being withhold at borders. Other than that the situation might not have changed dramatically.
- 供应商关张虽然不是个问题，但选择这个原因的受访者人数仍是选择货物被边境扣留的两倍。除此之外，其他因素的选择都没有明显变化。

物料短缺的原因是

Are you facing material shortage due to:



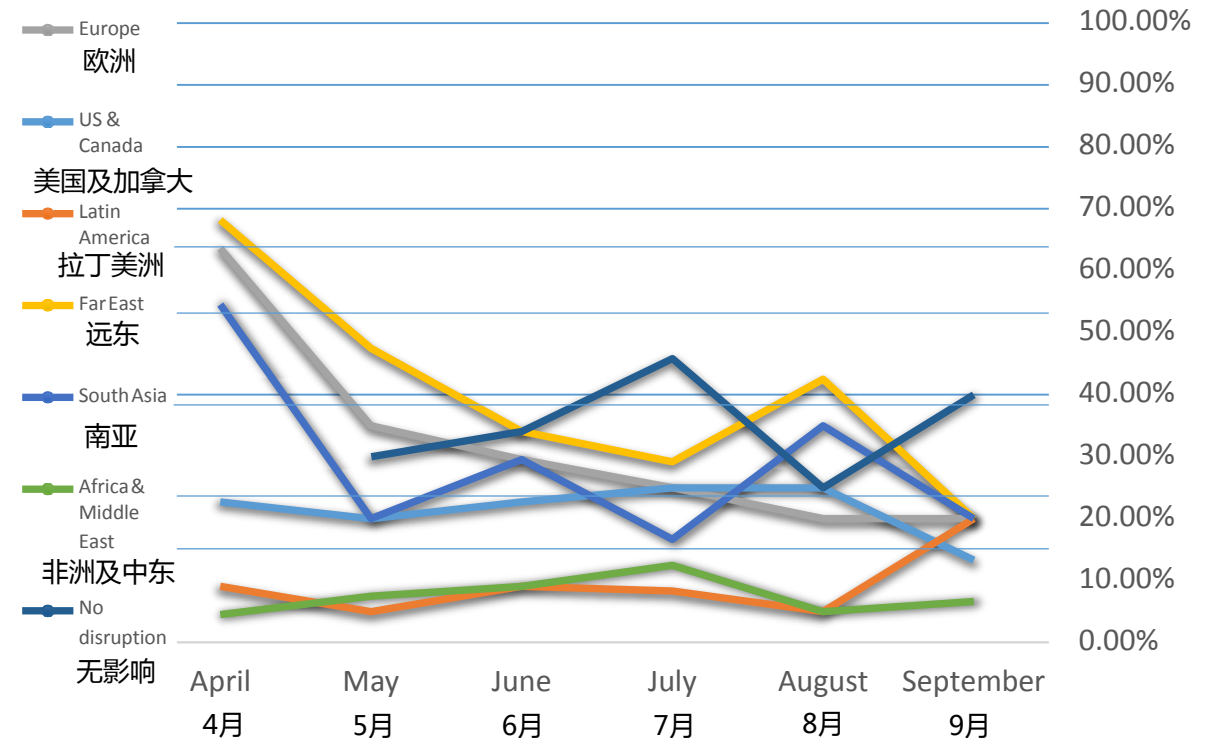
SUPPLY: the situation in Europe and LATAM remains critical while it improved in all other regions

供应：欧洲和拉丁美洲的局势仍然严峻，其他地区的情况有所改善



- 40% don't face any supply shortages which is a positive sign.
- 40%的人没有面临任何供应短缺，这是一个积极的信号。
- The number of respondents facing disruption in Europe remains important.
- 在欧洲面临供应中断的受访者人数仍然很多。
- The biggest increase of supply chain disruption compared to last month is seen in LATAM.
- 与上个月相比，拉美地区的供应链中断的问题格外严重。
- Positive development can be seen especially for Northern America and the whole of Asia.
- 北美和整个亚洲都有积极的改善。

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



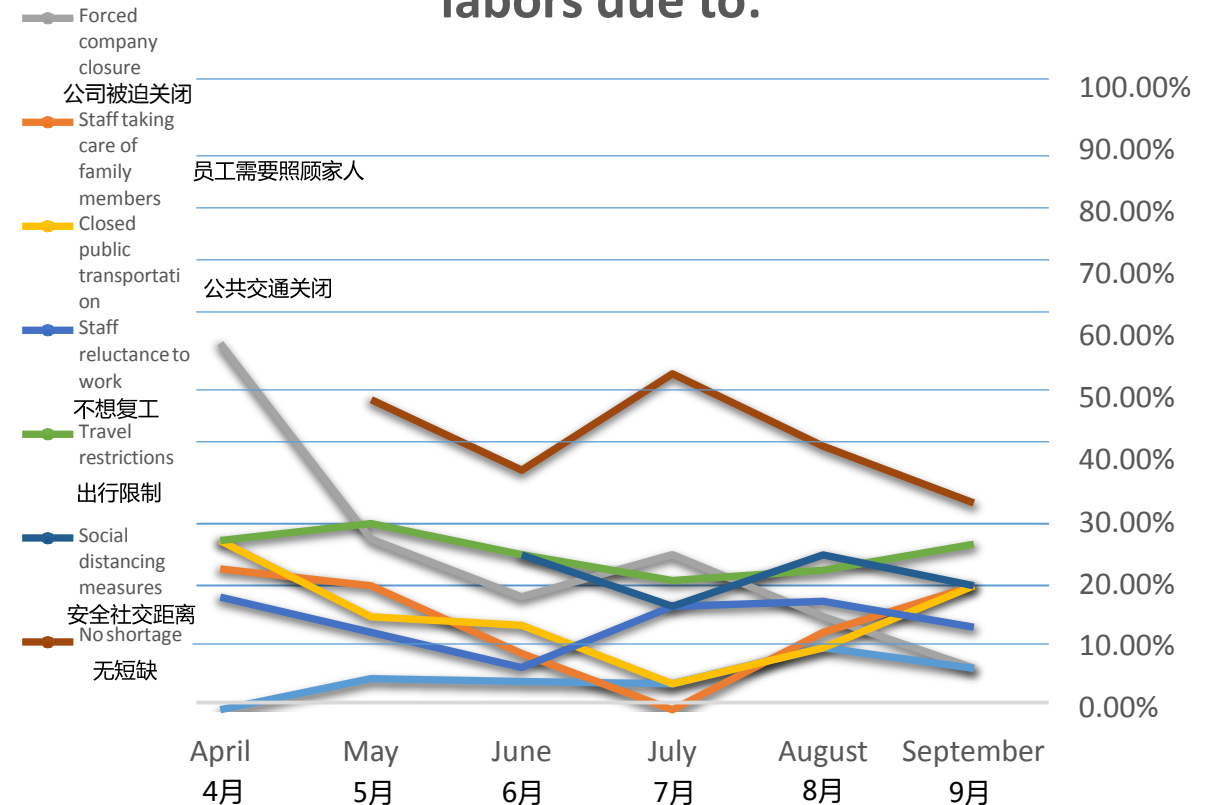
LABOR: Travel restrictions, closed public transportation, care taking of family members impact labor availability

劳工：出行限制、封闭公共交通、照顾家庭成员成影响劳动力的主要因素



- Since now three months labor shortage is decreasing.
三个月以来，反馈没有劳动力短缺的人数逐渐减少。
- There is also a clear trend showing that forced company closure is less of an issue.
一个明显的趋势表明，公司被迫关闭并不算是个问题。
- The level of infected staff impacting business remains over the average this month with close to 7% of respondents indicating this as an issue.
本月由于员工感染新冠肺炎影响公司业务的受访者比例仍高于平均值，近7%的人表示这是一个问题。
- Also, the staff taking care of infected family members is again up to 20%. This number is as high as during the lockdown period in April. As a reminder, 0% of respondents chose this option in July. The same development is seen with closed public transportation and travel restrictions due to the pandemic.
此外，需要照顾受感染家庭成员的工作人员再次高达20%。这一数字与4月处于封锁期时的数据一样高，而在7月，没有受访者选择这一选项。由于疫情爆发，公共交通关闭、出行受限等选项的发展趋势与上述雷同。

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



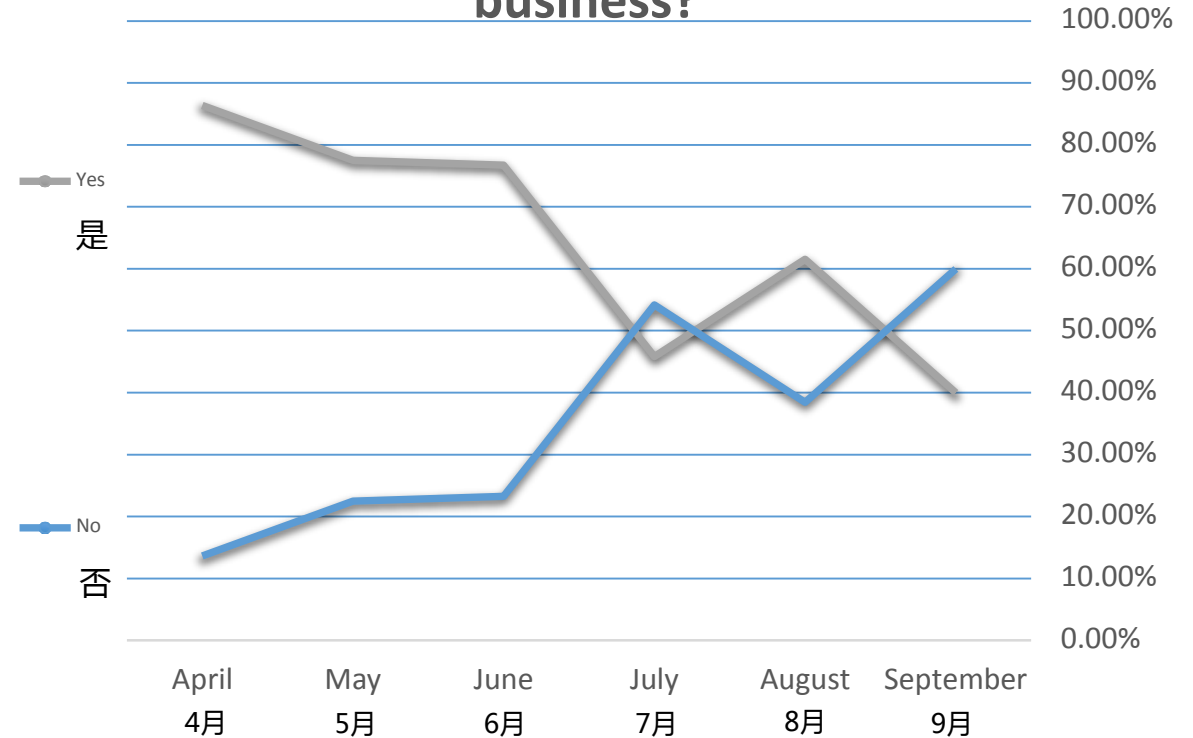
LEGAL: Positive situation as less impact is faced

法规：影响减弱呈积极趋势



- Again, less respondents are impacted by legal measures. There is no clear trend to be detected, rather an up and down development.
- 受法律措施影响的受访者有所减少。近几个月的结果没有表现出明显的发展趋势，而是持续波动。

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: trend goes on, close to no changes at all

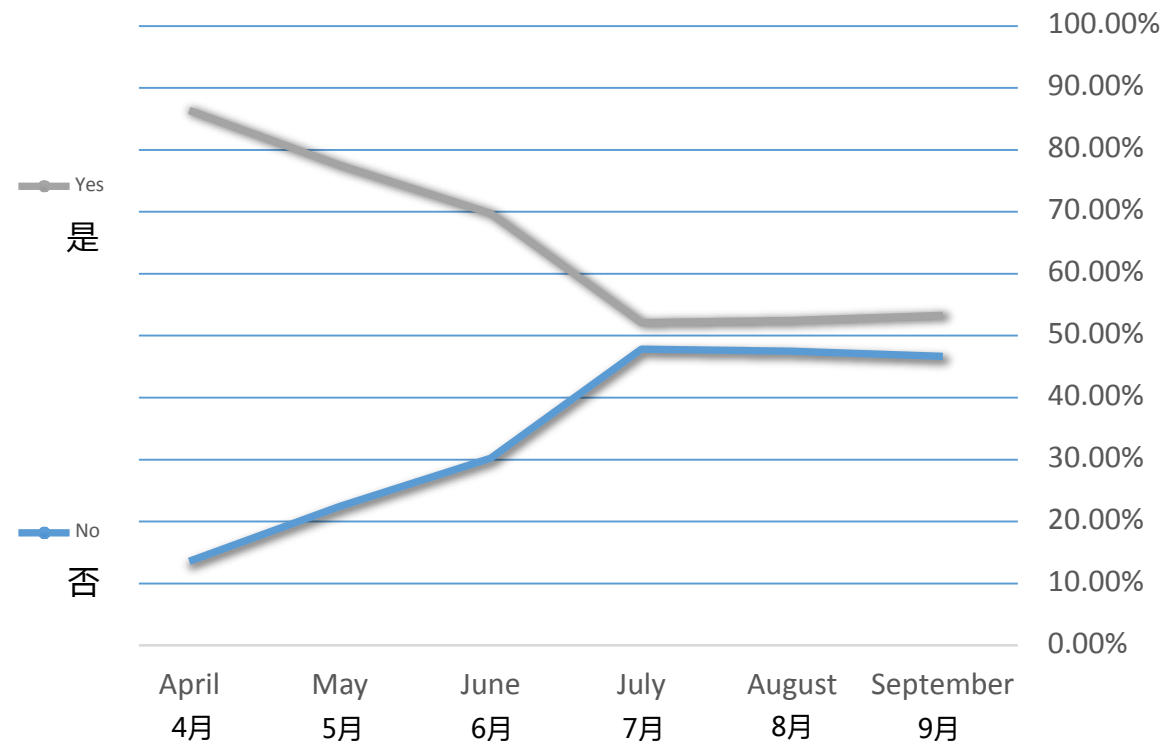
财务：趋势仍在继续，结果几乎无变化



- There is close to no change compared to the last two months and still just a small majority of respondents face cash flow challenges.
- 结果与上两个月相比几乎没有变化，仍只有少数受访者面临现金流挑战。

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: Roughly same situation as last month

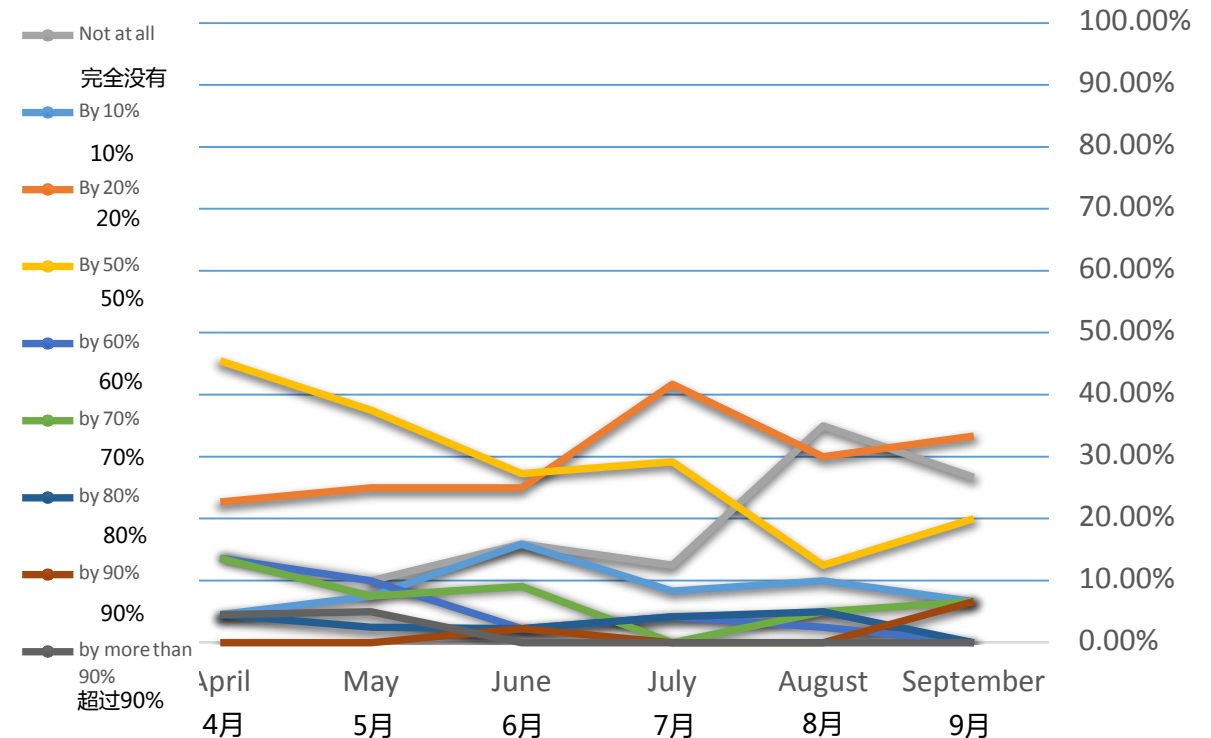
业务预测：与上个月结果大致相同



- A little less than 75% of respondents see their business being impacted by COVID-19. Last month still 65% saw an impact.
- 不到75%的受访者认为他们的业务受到了疫情影响，上个月该数据为65%。
- Most respondents see a business drop by 20% (33% of respondents) and a decline of 50% (20% of respondents). This shows roughly the same overall balance as last month.
- 大多数受访者认为业务下降了20%（33%的受访者）和50%（20%的受访者）。结果基本与上个月持平。
- The most affected regions remain Europe where over half of respondents see their business drop. Followed by Northern America and Far East.
- 受影响最严重的地区仍然是欧洲，超过一半的受访者认为他们的业务量有所下降，其次是北美和远东。

您认为业务会在下月下降么？

Do you see your business dropping in the upcoming month:



BUSINESS FORECAST: Less confidence in recovery goes on

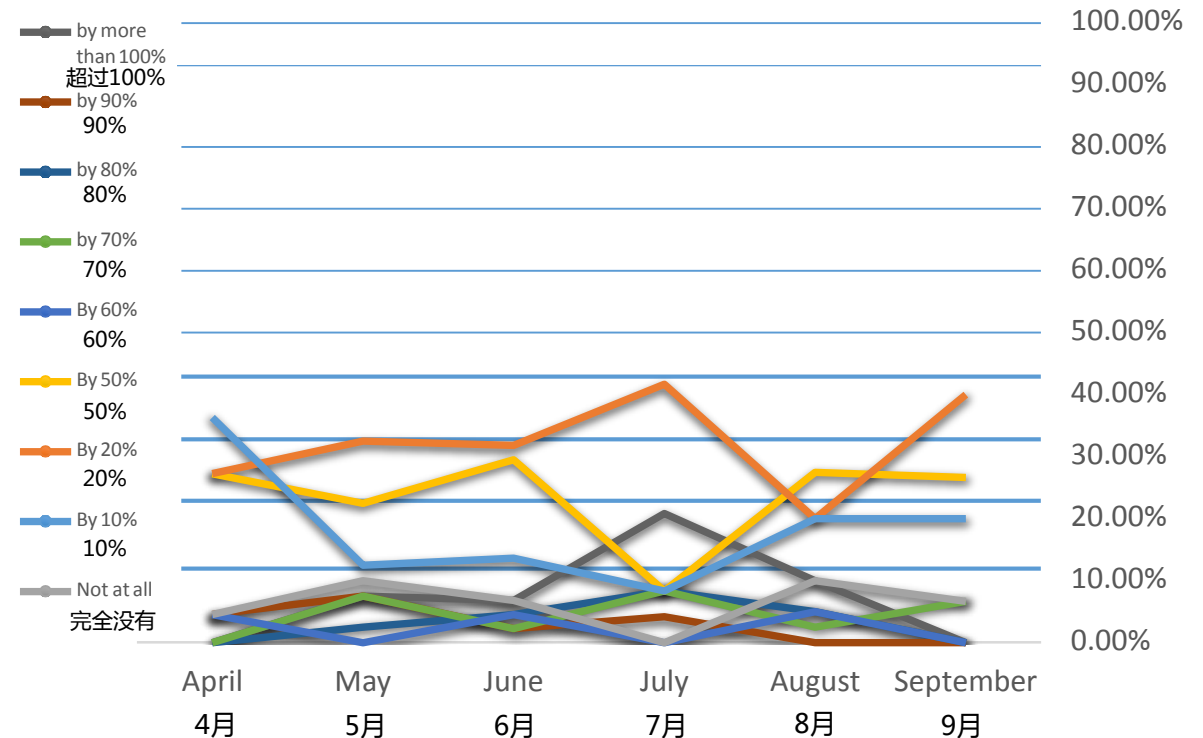
商业预测：对全面复苏的信心持续降低



- Still 7% of respondents don't expect any rebound of their business at all.
- 仍有7%的受访者认为自己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%。
- This is a slightly more pessimistic outlook than in the past month.
- 与过去一个月相比，这一预测略为悲观。
- With regard to the time frame necessary for the recovery, a majority of 60% think that their business will need more than one year (last month 45% opted for this answer).
- 关于经济复苏所需的时间范围，60%的人认为他们的业务需要一年以上的恢复期（上个月45%的人选择了这个答案）。

您认为疫情结束后，经济会复苏么？

Do you foresee the business rebound after the pandemic?

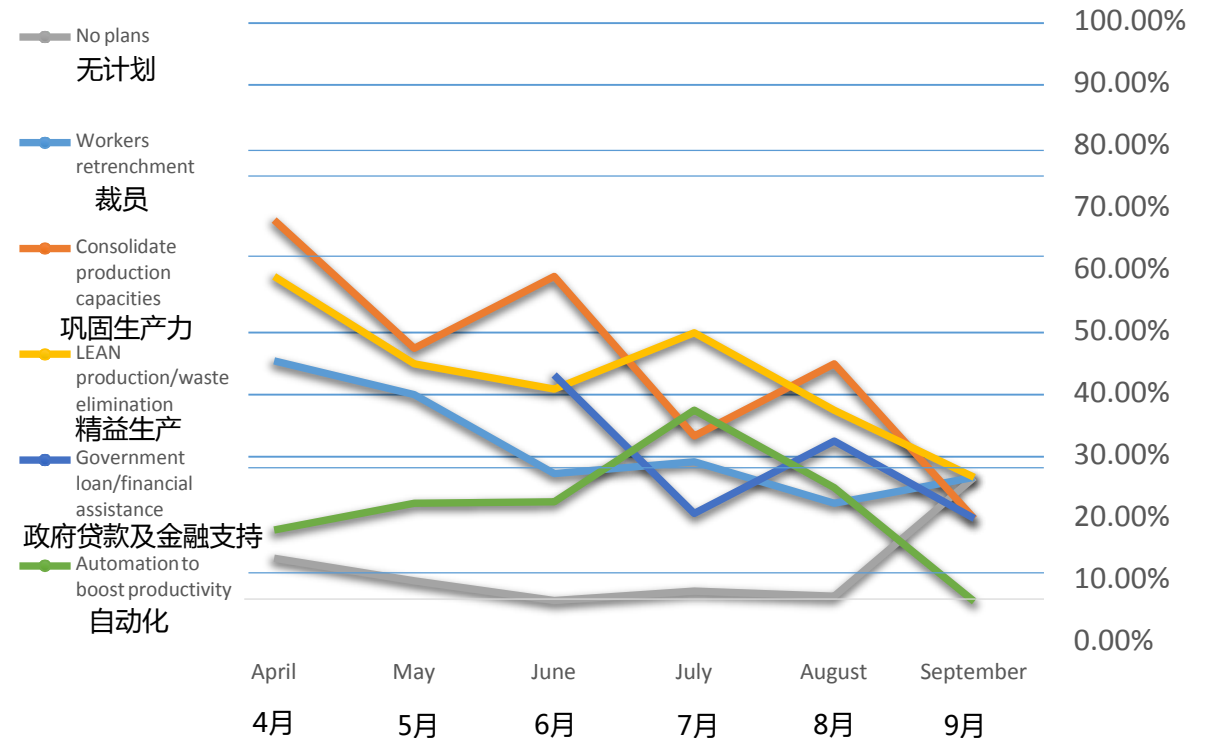


MEASURES TAKEN: one quarter has no plans for measures 所采取的措施：四分之一的公司没有改善措施计划



- Close to 27% have no plans to sustain operations. That's by far the highest number ever registered since the survey was launched in April. Last month only 7% had no plans.
- 接近27%的人没有维持运营的计划，这是自今年4月调研启动以来，选择人数最多的一次。上个月该数据仅为7%。
- There is a sharp decline of companies consolidating production of 25%.
- 选择巩固生产力的受访者比例锐减了25%。
- Still 20% of respondents are turning towards governmental support.
- 仍有20%的受访者转向获得政府支持。
- The number of respondents considering lean production and worker retrenchment remains high at 26% both.
- 考虑精益生产和裁员的受访者人数均高达26%。

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: Increasing online sales and keeping minimum inventories

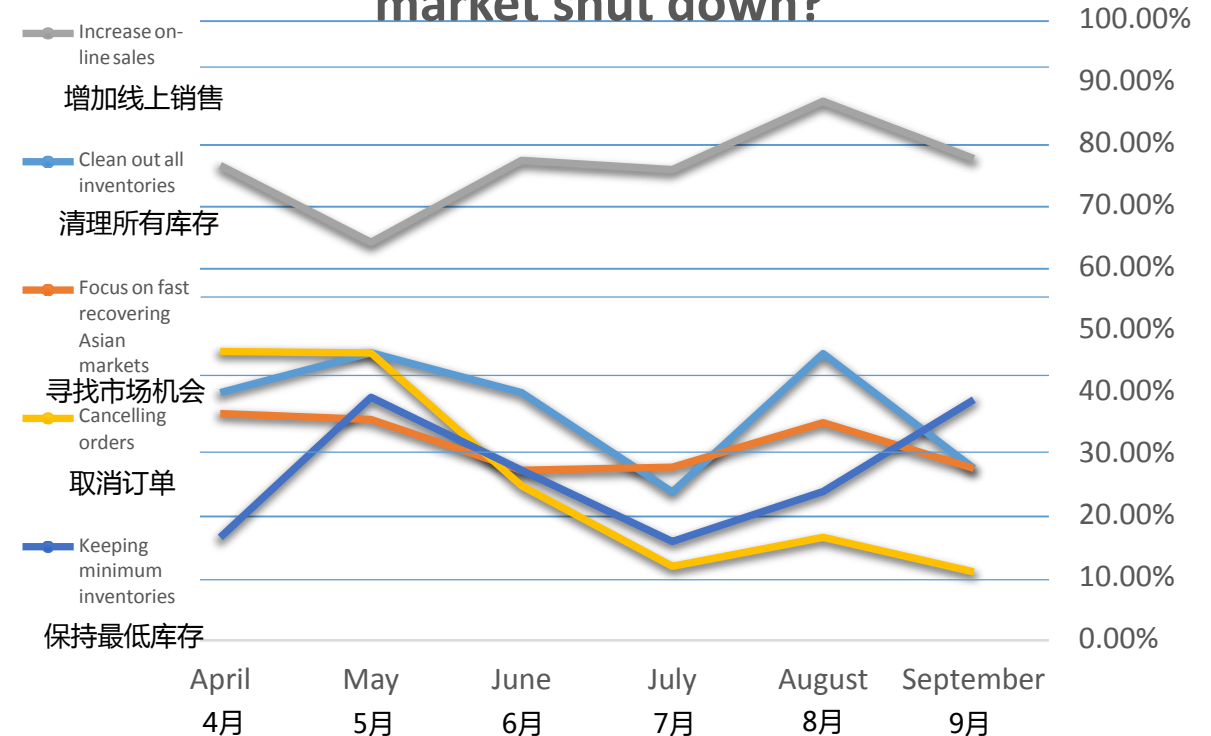
减轻影响：增加线上销售&保持最低库存



- Even though increasing online sales has lost a little support (-10%) it remains unchanged the most chosen option to mitigate the impact of the pandemic.
- 尽管增加线上销售已经失去了一些支持（降幅10%），但它仍然是减轻疫情影响的最佳选择。
- While focusing on recovering markets, cancelling orders and clean out inventories have seen a drop, keeping minimum inventory is increasingly important.
- 专注于复苏的市场、取消订单和清理库存三个选项的支持率有所下降，保持最低库存变得越来越重要。

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?



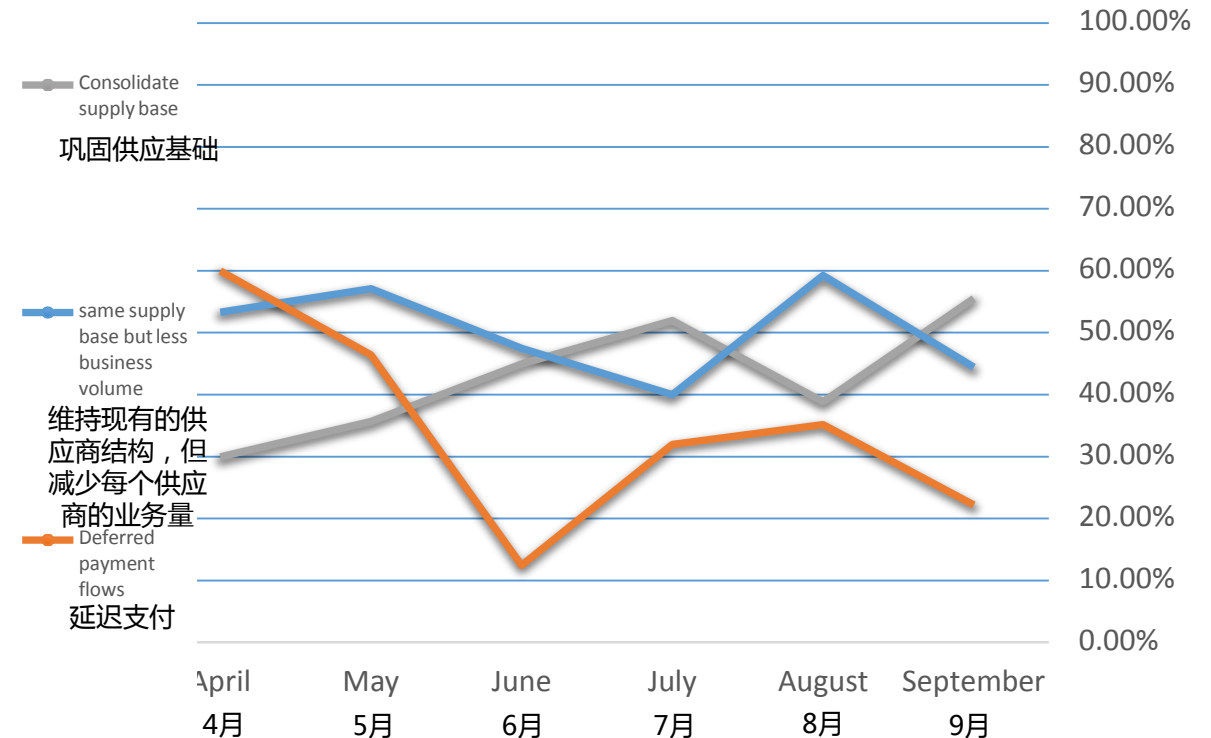
REPERCUSSION: Over 50% opt for consolidating the supply chain 后果：超过半数的人选择整合供应链



- Consolidating the supply chain is back on the top of the list.
- 整合供应链的重要性再次位居榜首。
- Deferring payment flows has lost support after it gained importance during months.
- 延迟支付在经过几个月的较高支持率后，逐渐失去了优势。

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: Primary focus on cash position

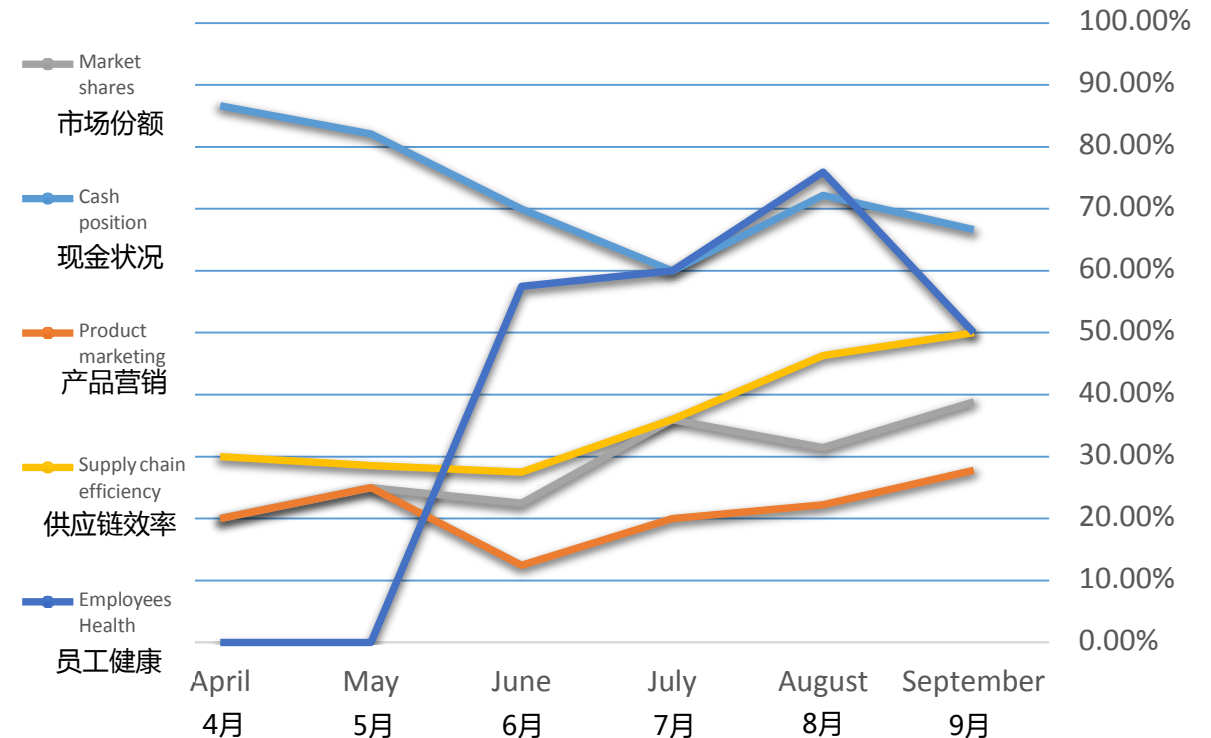
侧重点：主要关注现金状况



- Cash position and employees' health are less important this month after that they both gained in importance last month.
- 现金状况及员工健康两个选项经历了上个月的短暂反弹，再次失去了吸引力。
- Supply chain efficiency, market shares and product marketing are further gaining importance.
- 供应链效率、市场份额和产品营销持续获得关注。

在这个困难时期，您的侧重点是？

What would your priorities be during this difficult period?



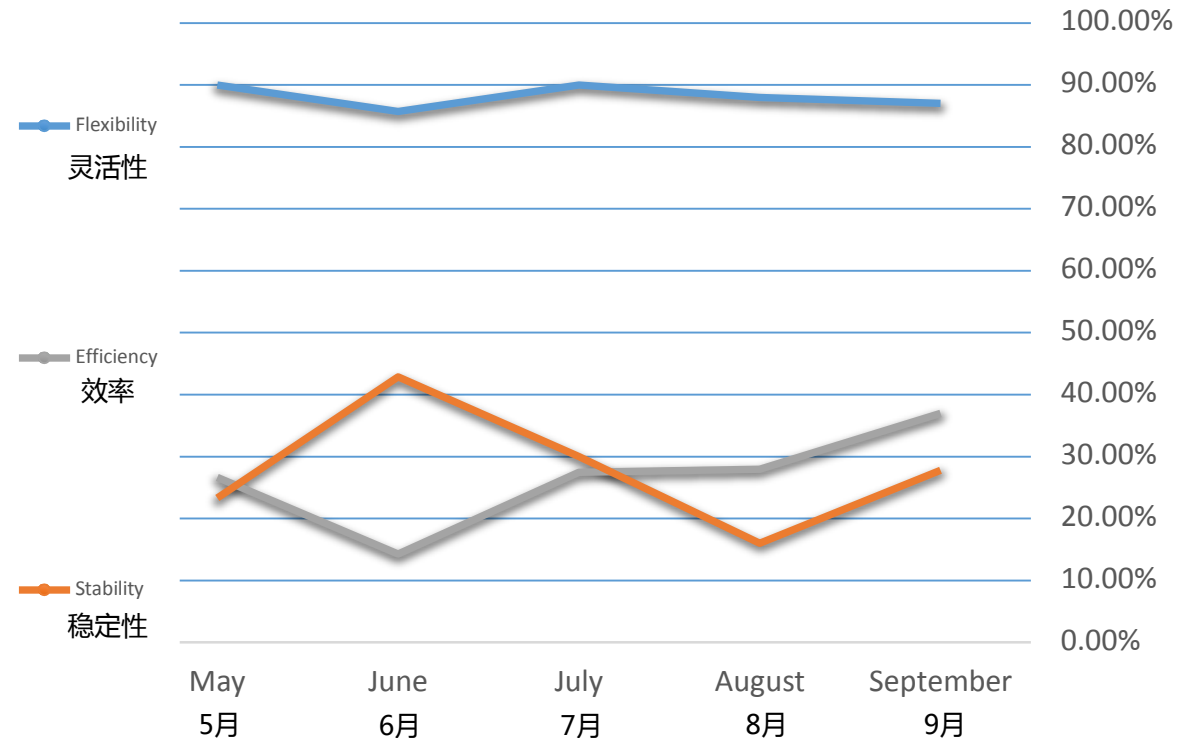
EXPECTATIONS TO SUPPLIERS: Flexibility cannot be overstated 对供应商的期望：灵活性的的重要性不言而喻



- Flexibility remains key as it is chosen by close to 90% of respondents.
- 灵活性仍然是关键，有接近90%的受访者选择了该选项。
- Both, efficiency and stability have become more important with an increase of around 10% of respondents choosing these answers.
- 效率和稳定性都变得更加重要，受访者占比均增加了约10%。

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: Remaining increase of transforming supply chains by moving closer to the market

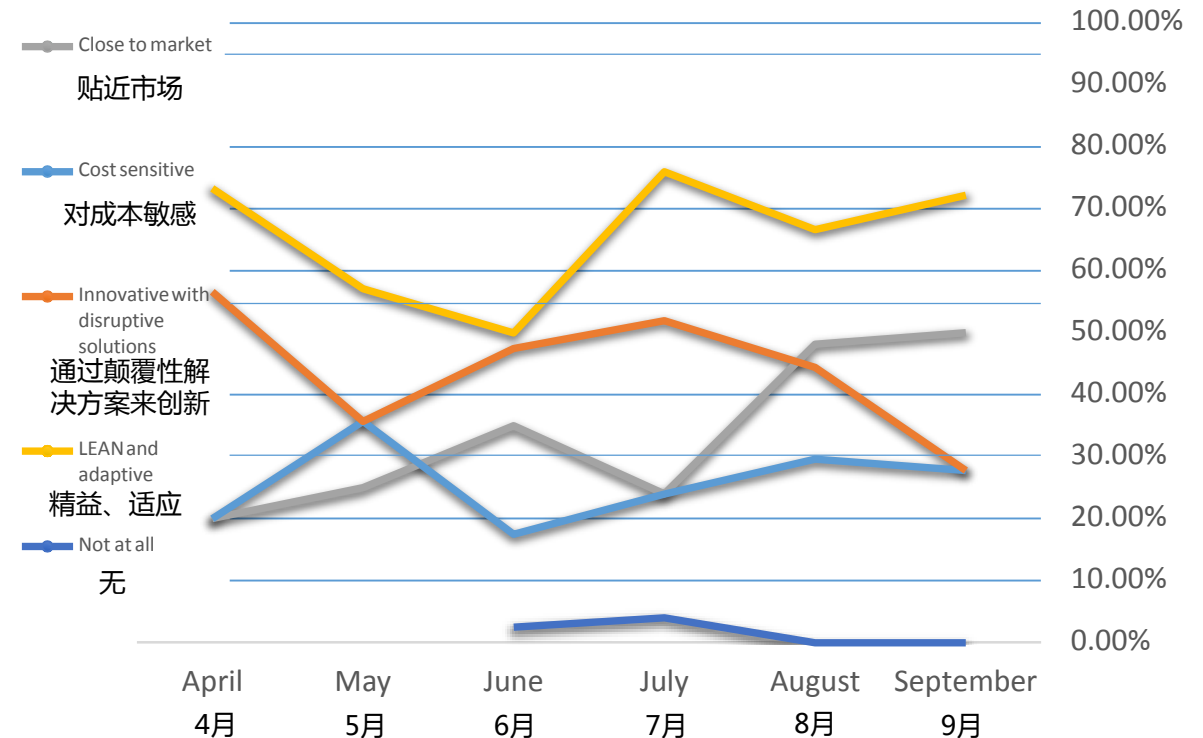
供应链转型：贴近市场的转型供应链持续增加



- Lean and adaptive supply chain transformation is remaining the most attractive solution after a small drop last month.
- 经过上个月的小幅下降，精益和适应性供应链转型仍然是最具吸引力的解决方案。
- Being close to the market keeps its importance while innovation is losing attractiveness.
- 在创新失去关注度的同时，贴近市场仍备受欢迎。

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: Less support for change

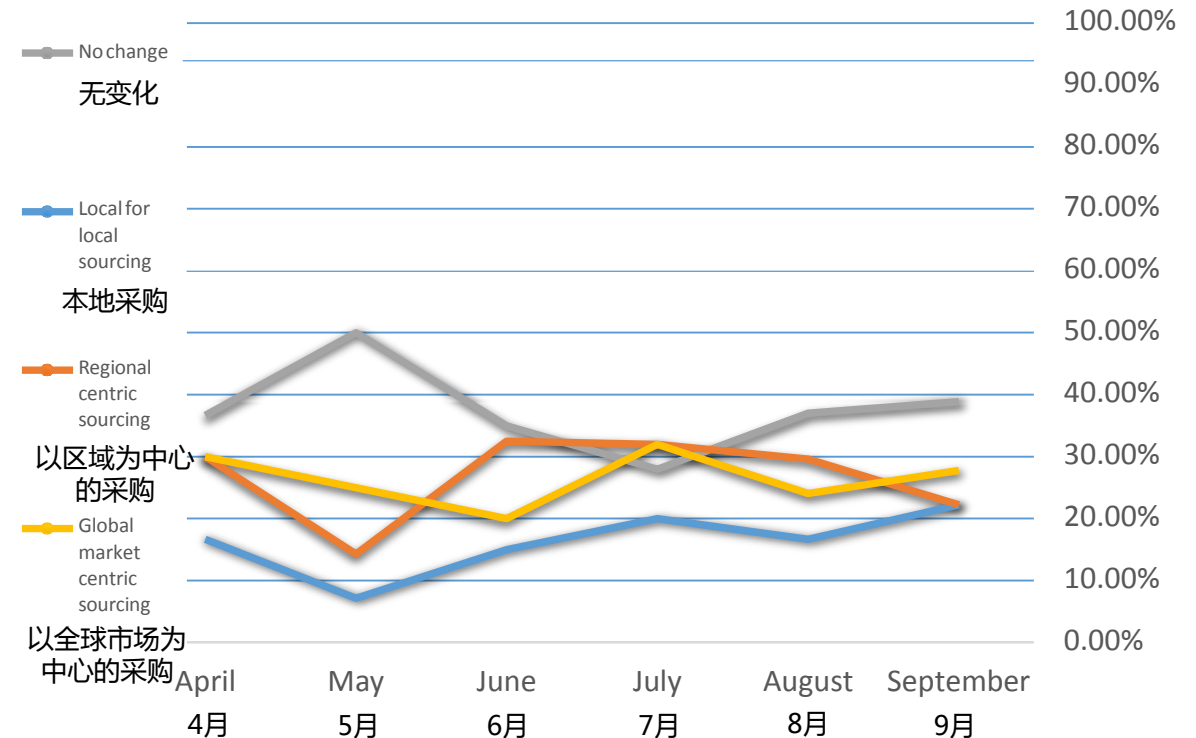
采购优先顺序：对变革的支持率降低



- Most of the respondents are not at all reframing their sourcing priorities, this is again an upwards trend.
- 大多数受访者根本没有重新规划采购优先顺序，这再次呈现出一个上升趋势。
- While regional centric sourcing loses support, people seem to rather focus on local to local and global market centric sourcing.
- 以区域为中心的采购失去了支持，人们似乎更关注本地到本地和以全球市场为中心的采购。

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, fit, comfort

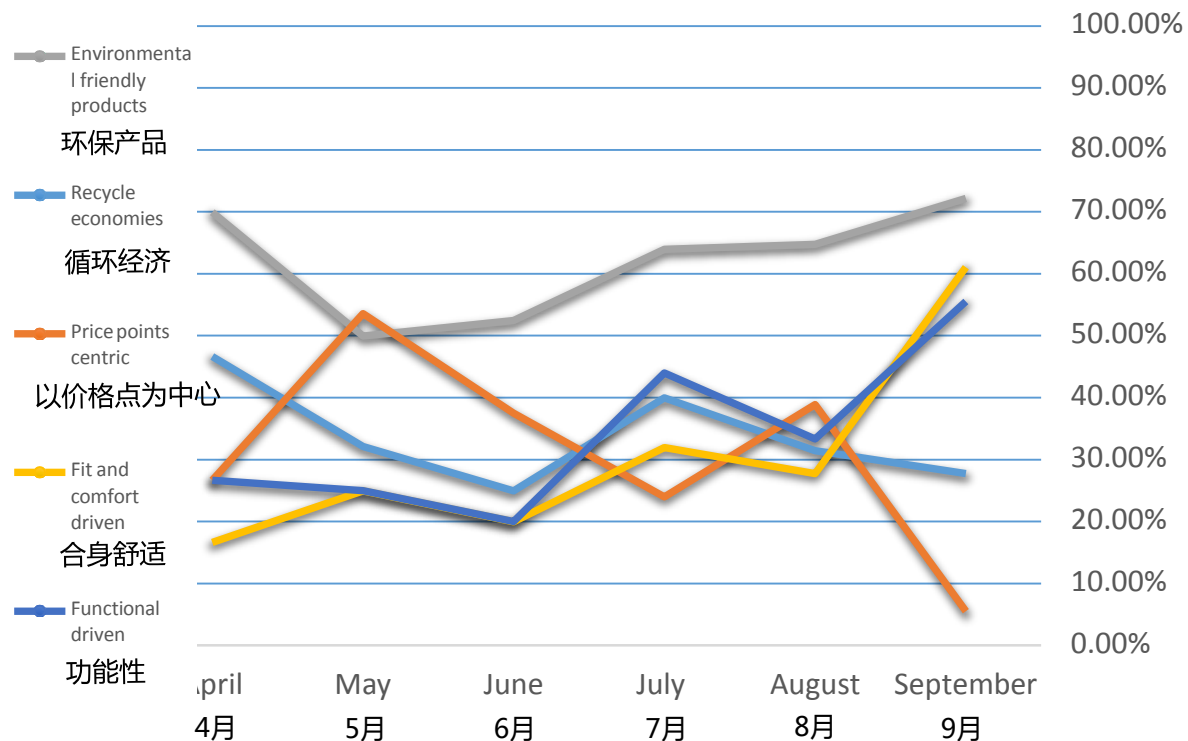
and functional driven trends stay on top

市场趋势：环保产品、合身舒适、功能性保持领先趋势



- The environmentally friendly products option is further gaining importance and is chosen by over 70% of participants this month.
- 环保产品仍然保持领先优势，70%的受访者支持了这一趋势。
- While price points centric trends was the second most chosen trend this month it is again on the very bottom this month.
- 以价格点为中心的趋势在上个月排名第二，本月再次排名最后。

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 the only

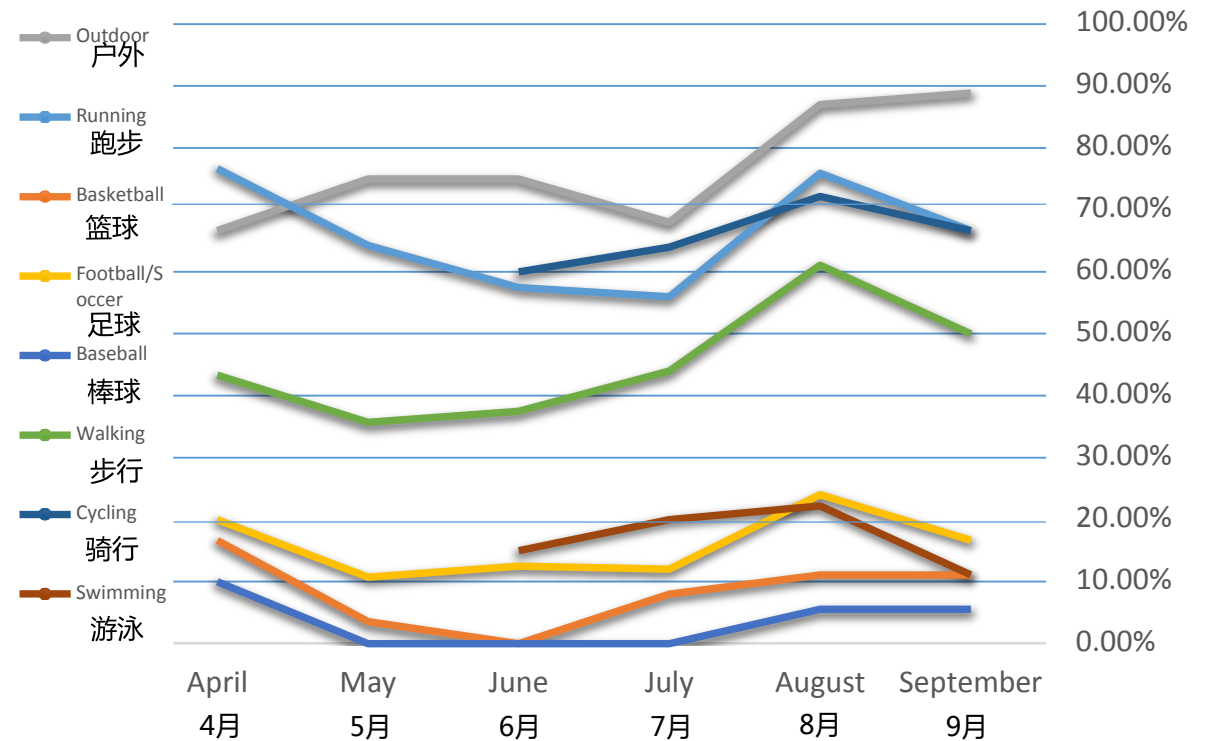
sport gaining support

疫情后的流行运动：户外运动是唯一获得支持的项目



- Outdoor is still on top of the list.
- 户外运动仍然位居榜首。
- While all other sports have seen decreasing number of respondents selecting them, outdoor is the only option chosen by more participants this week.
- 虽然选择所有其他运动项目的受访者都在减少，但本周有更多的受访者选择了户外运动。

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 October 2020 下次调研 – 2020年10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

KEEP SAFE & HEALTHY 保重

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