

**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**

**March/April 2020 2020年3月~4月**





# PRELIMINARY INFORMATION

## 初步资料



- WFSGI will be 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将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

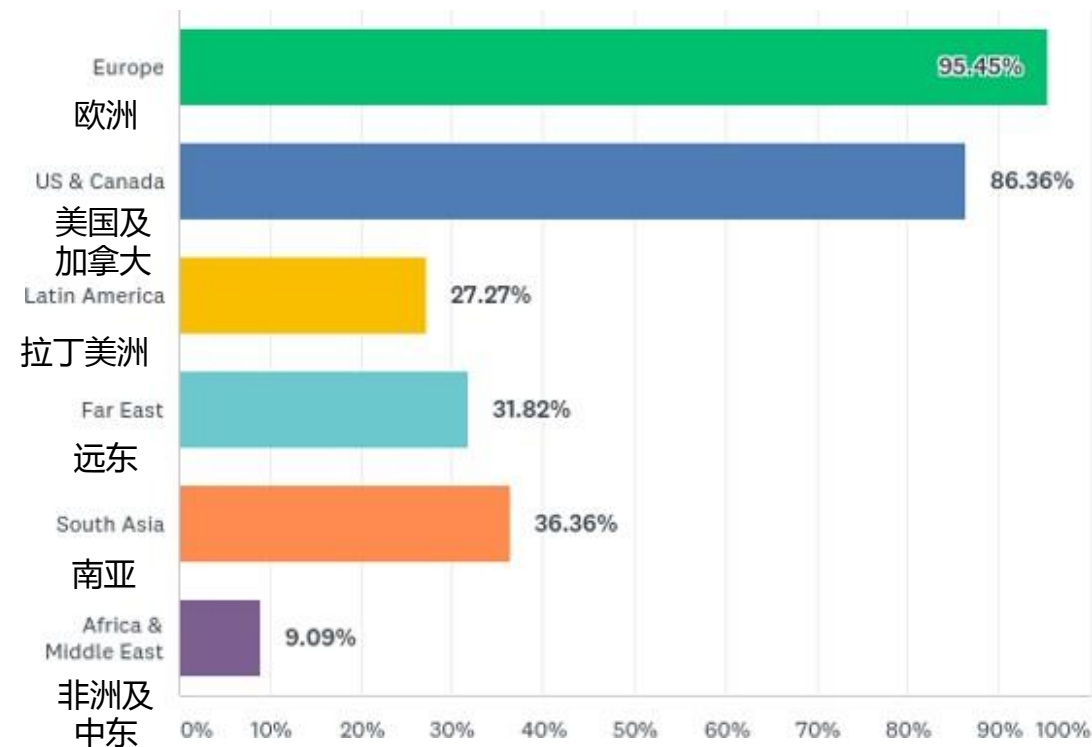


# DEMAND: SIGNIFICANT ORDER DECREASE

## 需求：订单明显减少



- Around 90% of respondents see decreasing orders from customers in Europe and the Northern America.
- 约90%的受访者认为来自欧洲和北美客户的订单有所减少。
- This number is lower (around 30%) for Latin America, Far East and South Asia.
- 仅有30%的受访者表示，拉丁美洲、远东和南亚受到影响。



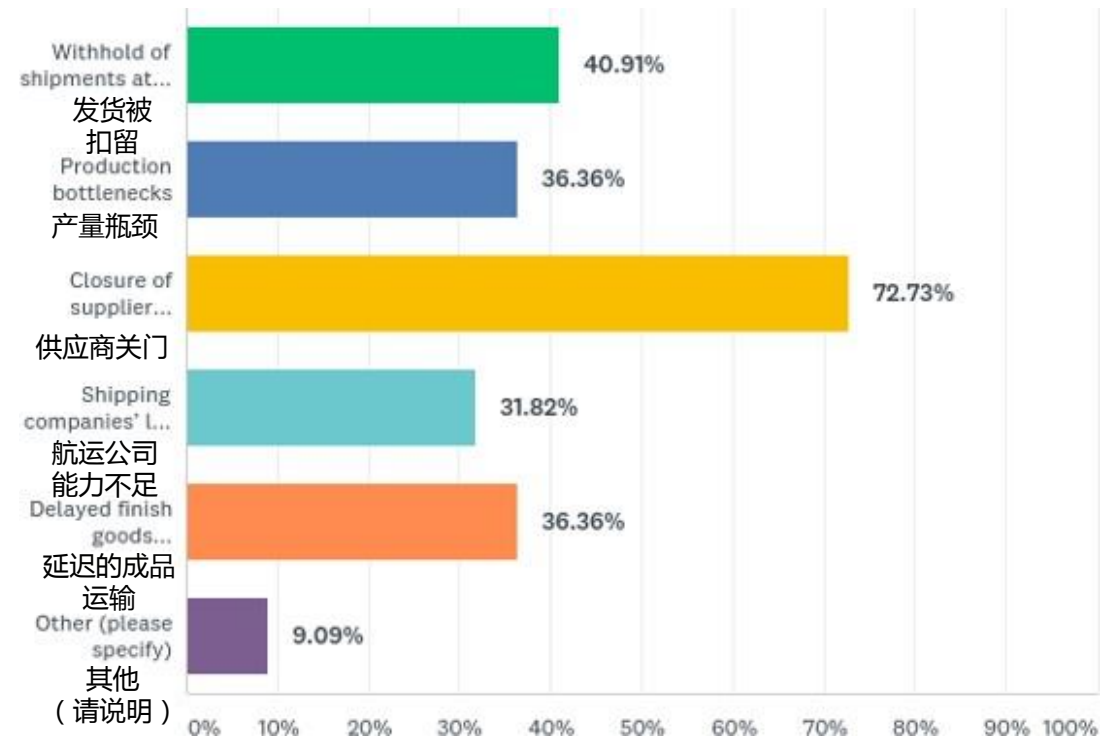


# LOGISTICS: SIGNIFICANT MATERIAL SHORTAGE

## 物流：物料明显短缺



- Over 70% of respondents face material shortage due to the closure of suppliers' companies.
- 超过70%的受访者因供应商公司关门而面临材料短缺。
- Around 40% face issues due to shipments being withhold, due to specific trade restrictions or delayed finish goods transportation.
- 大约40%的人面临着由于发货被扣留、或由于特定的贸易限制、延迟的成品运输而造成的材料短缺。
- A little over 30% have to cope with a lack of capacities of shipping companies.
- 超过30%的人须应对航运公司能力不足的问题。

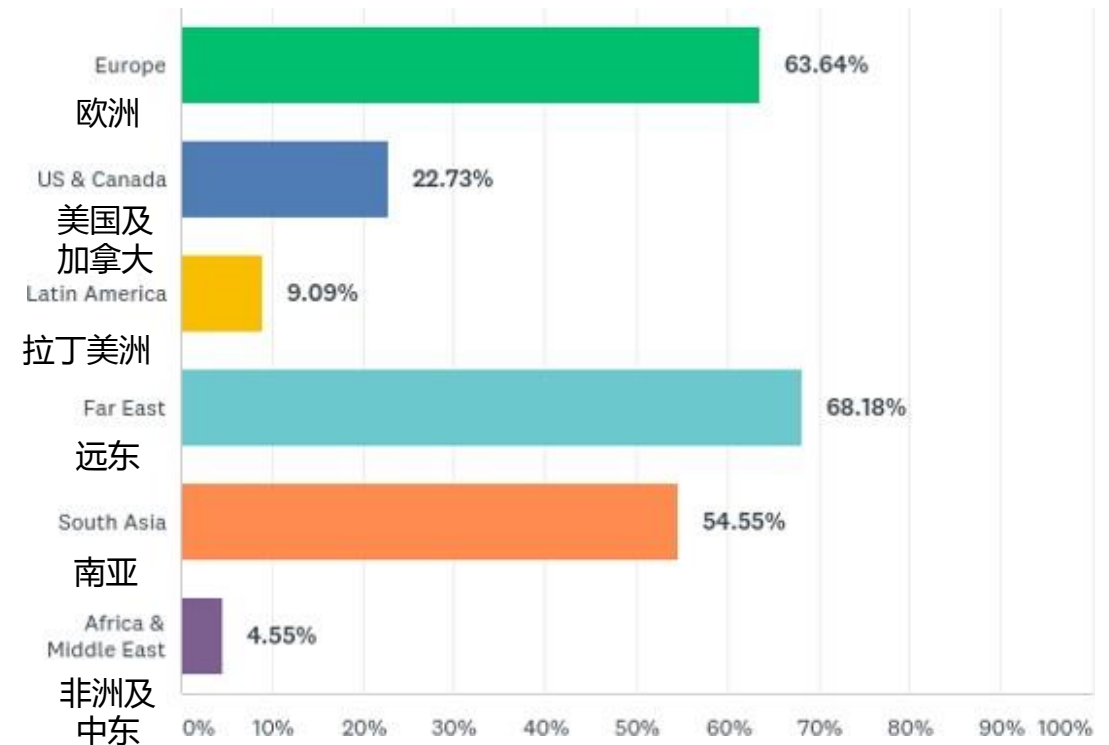


# SUPPLY: DISRUPTION GLOBAL SUPPLY CHAIN

## 供应：全球供应链中断



- Supply chains seem to be mostly affected in Far East (68%), followed by Europe (64%), South Asia (54%).
- 远东地区的供应链似乎是受到影响最严重的区域，受访者反馈比例达到68%，其次是欧洲（64%）和南亚（54%）。
- Supply chains in Northern America are only affected for 22% of respondents and in Latin America less than 10% see an impact on their supply.
- 北美的供应链仅有22%的受访者表示受到影响，而在拉丁美洲，只有不到10%的受访者认为供应链受到影响。

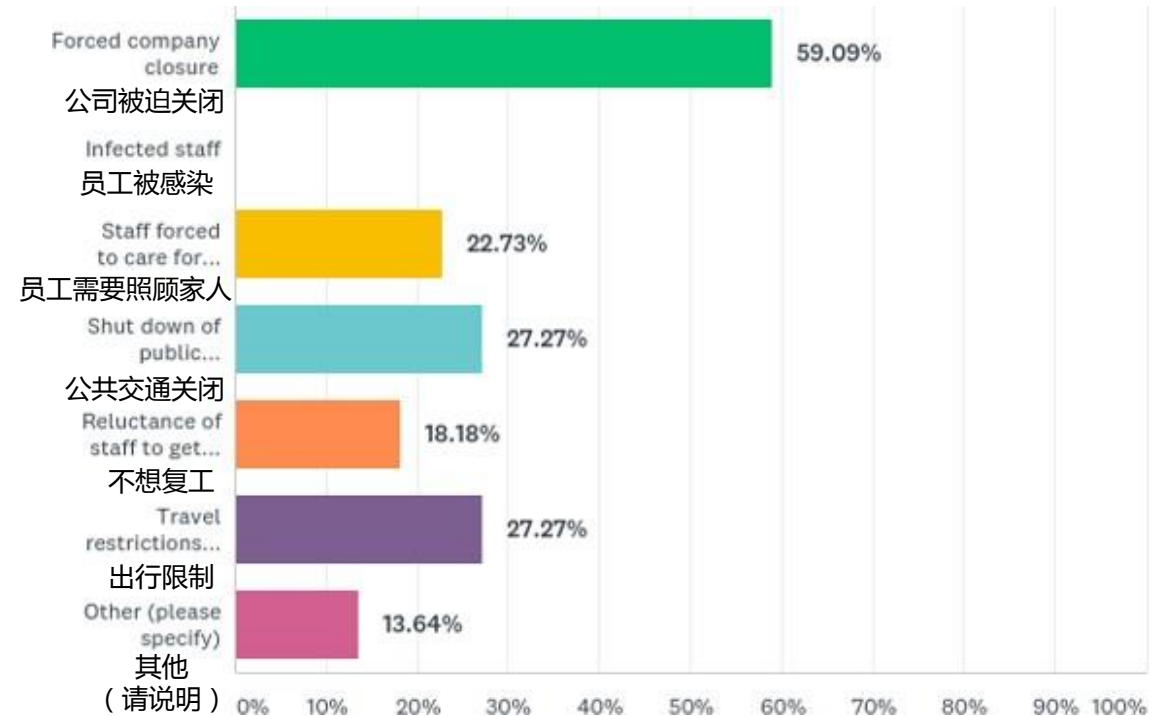


# LABOR: SHORTAGE OF LABOR

## 劳工：劳动力短缺



- Close to 60% see a labor shortage due to forced company closure.
- 近60%的受访者认为由于公司被迫关闭导致劳动力短缺。
- However, zero have infected staff members not showing up to work.
- 无人表示由于员工被感染而缺少劳动力。
- A little less than 30% face labor shortage due to travel restrictions for workers and shut down of public transportation for workers.
- 不到30%的人由于员工的出行限制、或是公共交通的关闭而面临劳动力短缺。
- Around 20% have seen staff not coming to work since they have to take care of family members or are reluctant to return to work due to fear to be infected.
- 大约有20%的人表示工作人员因为必须照顾家庭成员而不来上班，或者因为害怕被感染而不愿返回工作岗位。



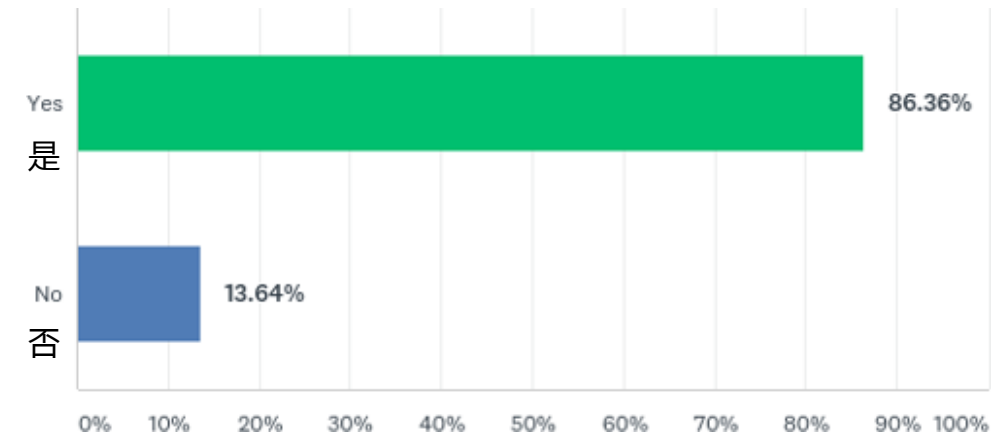


# LEGAL: IMPACT OF COVID-19 REGULATORY MEASURES

## 法规：疫情相关监管要求的影响



- Over 86% are impacted by specifically implemented regulations due to the COVID-19 pandemic.
- 由于疫情爆发，超过86%的人受到具体实施的监管的影响。

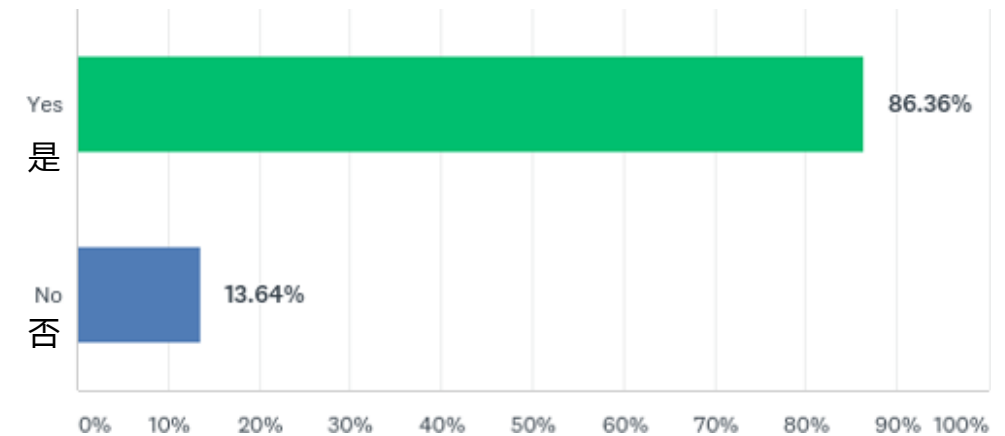


# FINANCE: SIGNIFICANT CASH FLOW ISSUES

## 财务：现金流问题严重



- Over 86% are challenged by low cash flow.
- 超过86%的人面临着现金流不足的挑战。
- This issue is caused due to extended payment terms and order cancellations, orders that are not delivered in time and since salaries are being paid in advance.
- 这是由于延期付款和订单取消、订单未及时交付以及工资提前支付造成的。
- Cash flow restrictions are also impacting on investment strategies.
- 现金流限的不足也影响投资策略。
- 50% of respondents said they will refrain from investments while 40% plan to invest in software and people and close to 30% plan to invest in infrastructure.
- 尽管接近50%的人会限制投资，仍有40%的人计划在软件和人员进行投资，近30%计划投资于基础设施建设。

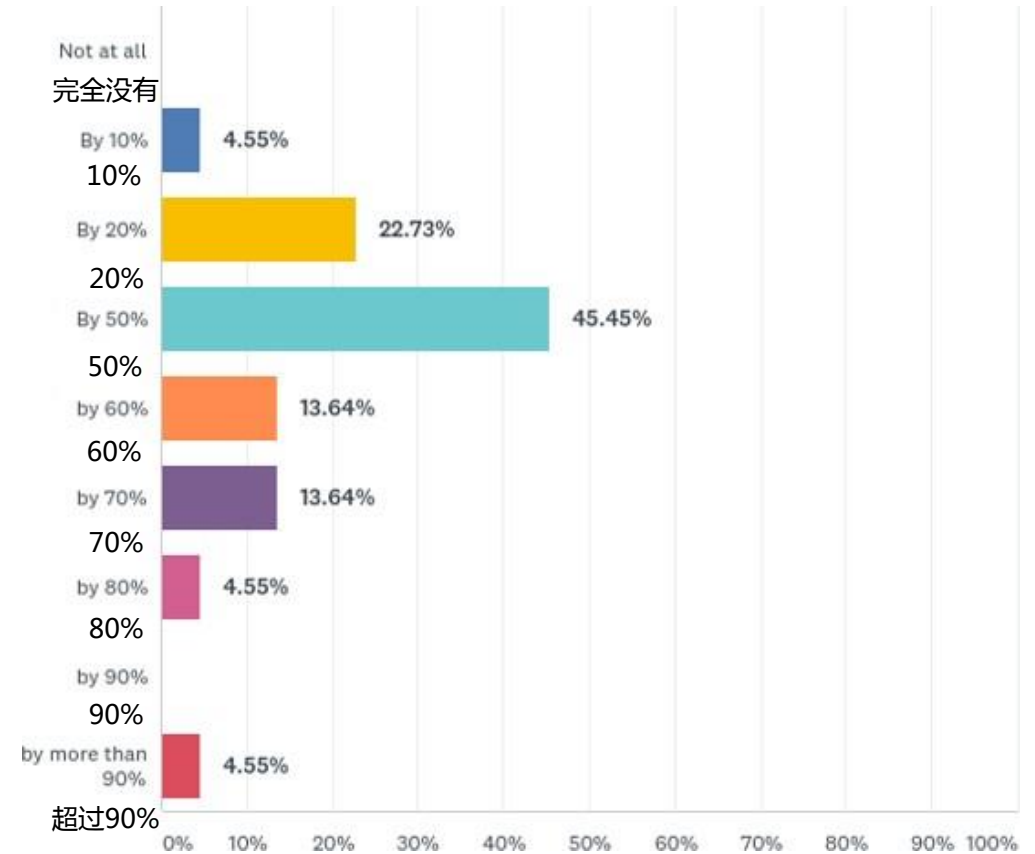


# BUSINESS FORECASTING: GLOBAL SLUMP

## 业务预测：全球经济衰退



- COVID-19 is forecast to impact every respondent's business.  
所有受访者预测疫情对他们的业务产生了影响。
- Most of them, close to 50%, see their business dropping by 50% in the upcoming month. Around 15% expect even a 70% respectively 80% drop.  
他们中有接近五成的人，推测其业务将在下个月下降50%。大约15%的人预计，营业额下滑程度甚至达到70%至80%。
- The more optimistic 22% of the respondents expect a drop of maximum 20%.  
约有22%的受访者呈乐观态度，他们预测，最大降幅仅达20%。
- The most affected region for respondents is Europe where 95% see a drop of their business.  
受访者受影响最大的地区是欧洲，有95%的人表示欧洲区业务下滑。
- In Northern America 77% expect business to decrease, while for Asia only 30% see a decrease of business followed by Latin America with only 18%.  
在北美地区，77%的人预计业务会减少，而在亚洲，只有30%的人预计业务会减少，其次是拉丁美洲，只有18%。



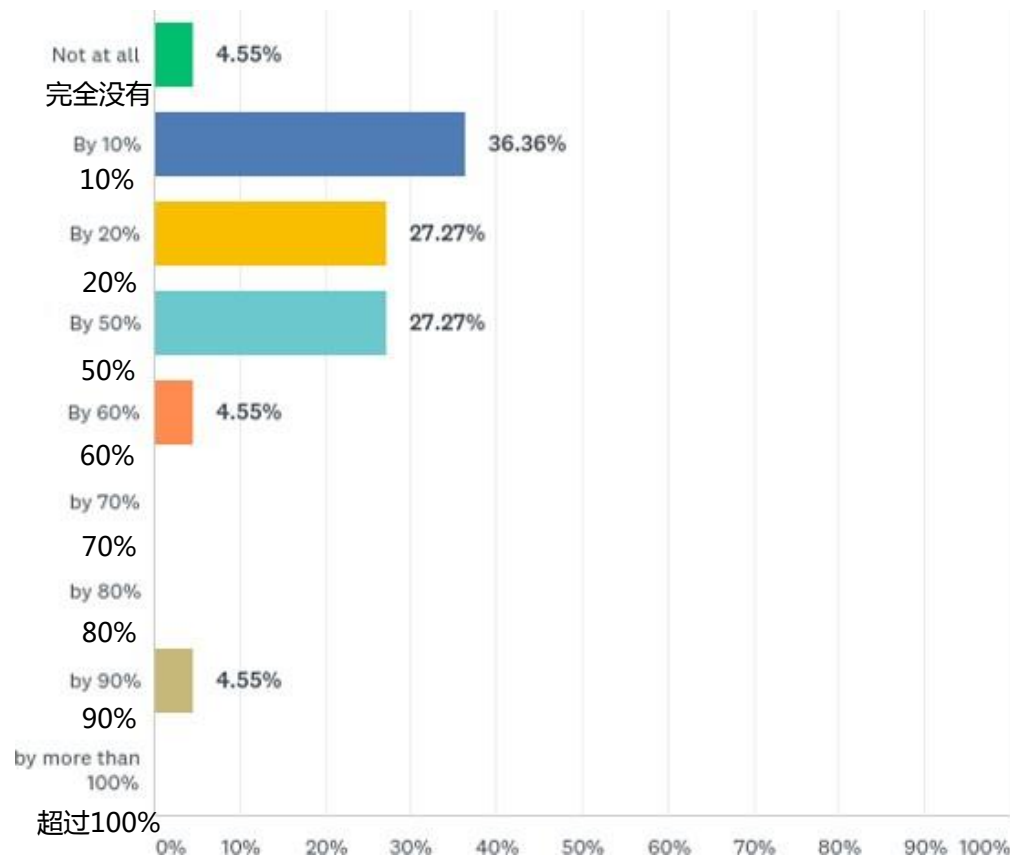


# BUSINESS FORECAST: SLOW & PARTIAL RECOVERY

## 业务预测：缓慢、部分复苏



- Industry confidence regarding the future outlook and recovery is low.
- 业界对未来前景和复苏的信心很低。
- Close to 40% of respondents only expect that their business will rebound by 10%.
- 接近40%的人预期其业务只会恢复到平时的10%。
- Roughly 25% of respondents expect their business to recover by 20%. The same percentage however, expected their business to recover by 50%.
- 近25%的人预期其业务只会恢复到平时的20%。还有25%的人预期恢复程度达50%。
- Less than 5% expect their business to reach 90% of its former performance. No respondents expect to reach 100% of their initial business performance.
- 不到5%的人预计他们的业务将恢复到以前业绩的90%。无人表示业务将100%恢复到疫情前的水平。
- Less than 30% think that they will only need 61-90 days to get back to business after the pandemic.
- 不到三成的人认为，他们只需要61-90天就可以在疫情结束后恢复正常经营。
- A majority of 60% foresee a timeframe of 91-180 days. Close to 10% even would predict that more than a year is necessary.
- 60%的大多数人预估恢复期需要91-180天，甚至有接近10%的人预测至少要一年缓冲。

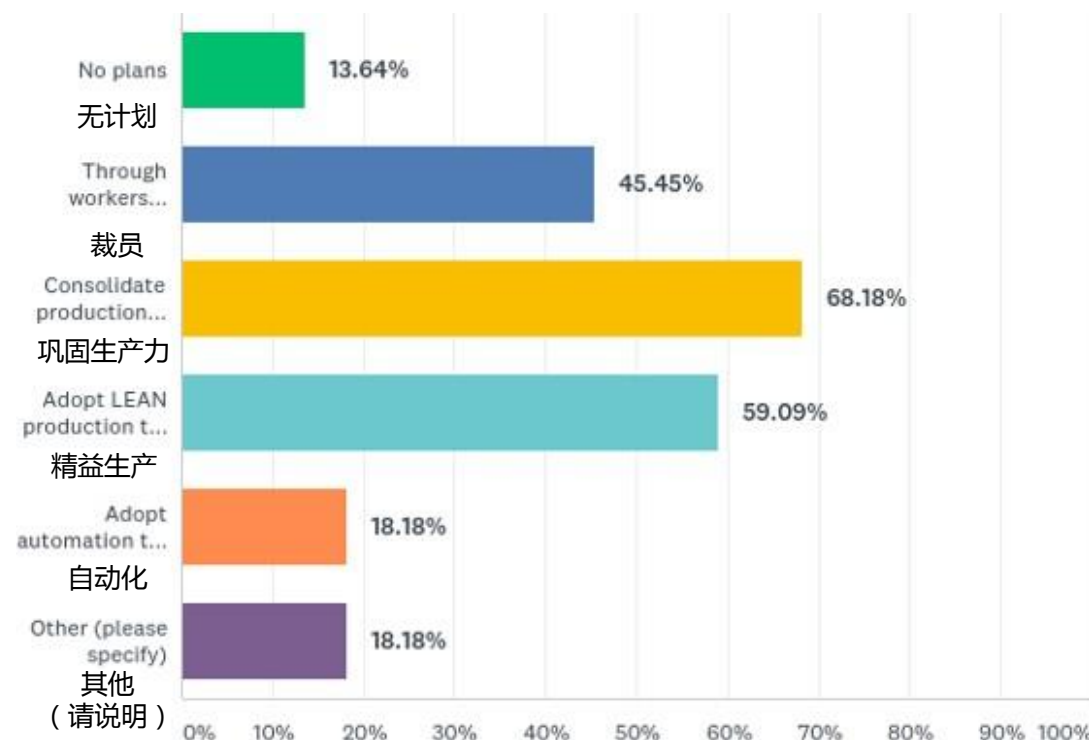


# MEASURES TAKEN: KEY INSIGHTS

## 所采取的措施：重要见解



- Close to 70% will consolidate production capacities as a response to the pandemic.  
为应对疫情，近70%的受访者将巩固生产力。
- Nearly 60% will focus on adopting lean production to eliminate waste.  
近60%的公司将致力于精益生产从而减少浪费。
- Over 45% will need to look into worker retrenchment.  
超过45%的人需要考虑裁员问题。
- Automation is a solution for close to 20% of respondents.  
自动化是近20%受访者的解决方案。
- A significant proportion of respondents(14%) have no specific plans in place.  
14%的受访者没有应对方案。





## 2. RESPONSES SPORTING GOOD BRANDS AND RETAILERS

### 体育用品品牌及零售商反馈



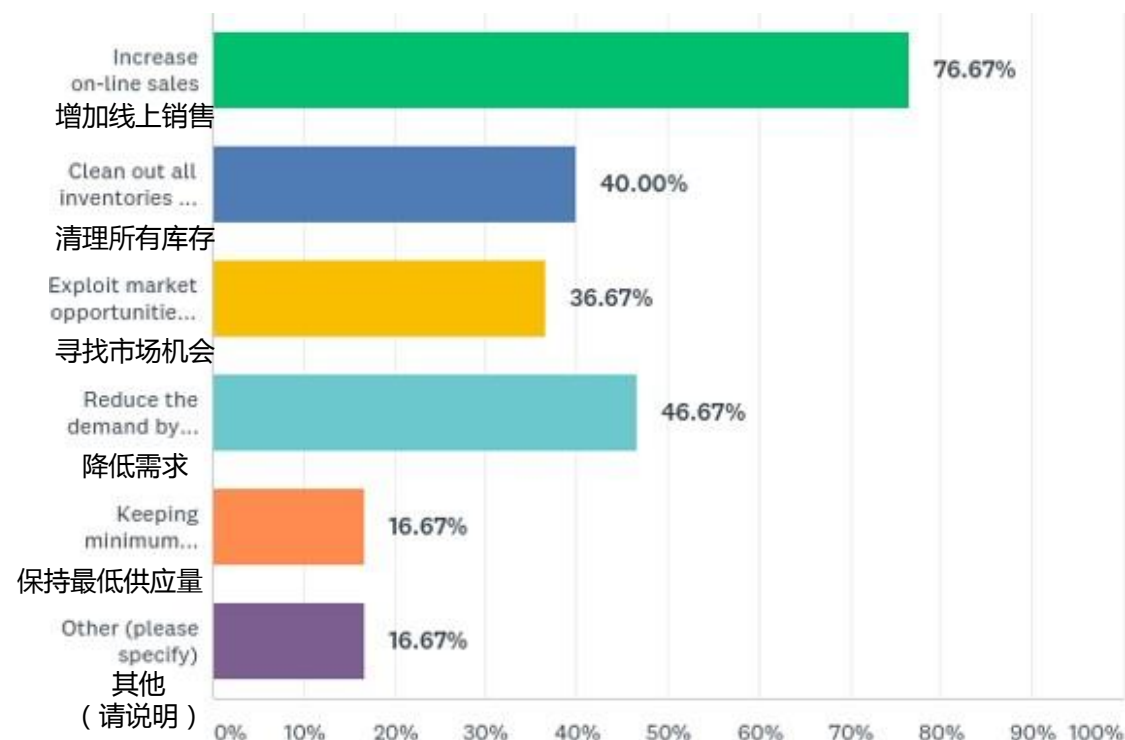


# MITIGATION OF IMPACT: STEPS THAT WILL BE TAKEN

## 减轻影响：采取的措施



- Close to 80% want to increase their on-line sales.
- 接近80%的人希望增加在线销售。
- 47% will reduce their demand by cancelling orders in the following months.
- 47%的公司将在接下来的几个月内取消订单，从而降低需求。
- Around 40% will clean out all inventories to maintain their cash position and exploit market opportunities in the recovering Asian markets.
- 有40%的公司将清理所有库存，以维持现金流，并在复苏的亚洲市场中寻找市场机会。
- This will lead for 60% of respondents to deferred payment flows.
- 这将导致60%的受访者选择延迟支付。
- Over 50% would opt for sharing the pains by keeping the same supply base but provide for less business volume for each supplier.
- 超过50%的人会选择维持现有的供货商结构，但减少每个供应商的业务量。
- Still 30% are looking to consolidate the supply base and keep only strategic partners.
- 仍有30%的企业希望巩固供应基础，只保留战略合作伙伴。

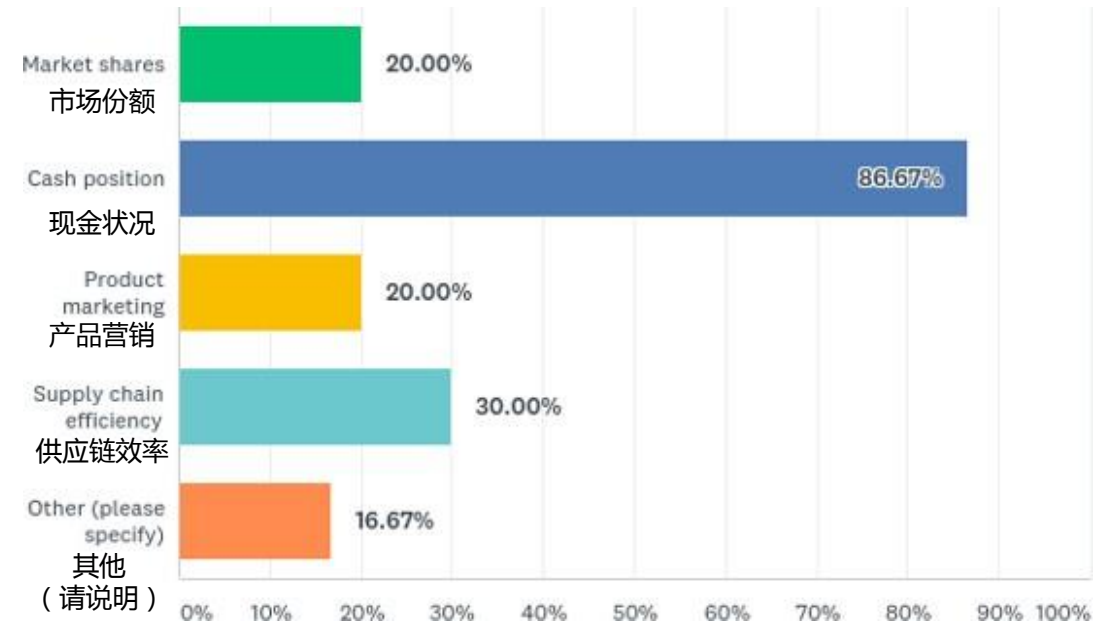


# PRIORITIES: KEY INSIGHTS

## 优先事项：重点见解



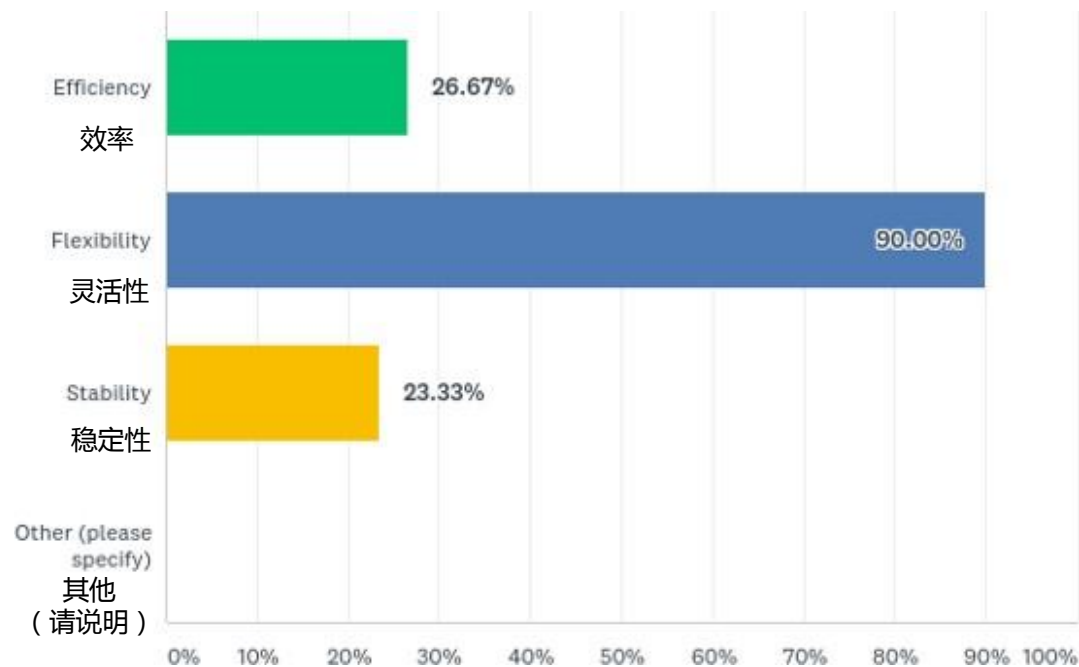
- Close to 90% will focus on cash position while 30% are increasing their supply chain efficiency.
- 近90%的人将关注现金状况，而30%的人正在提高他们的供应链效率。
- 20% will look in to product marketing and market shares.
- 20%将关注产品营销和市场份额。
- It was also mentioned that temporary unemployment for some staff supported by government payments is an option.
- 有人还提到，可以尝试让部分员工“暂时性失业”以申请政府补助。



# EXPECTATIONS TO SUPPLIERS 对供应商的期望



- Most respondents, 90%, are welcoming flexible suppliers while around 25% are awaiting efficiency and stability.
- 大多数受访者（90%）喜欢灵活的供应商，约25%的受访者看重效率和稳定性。



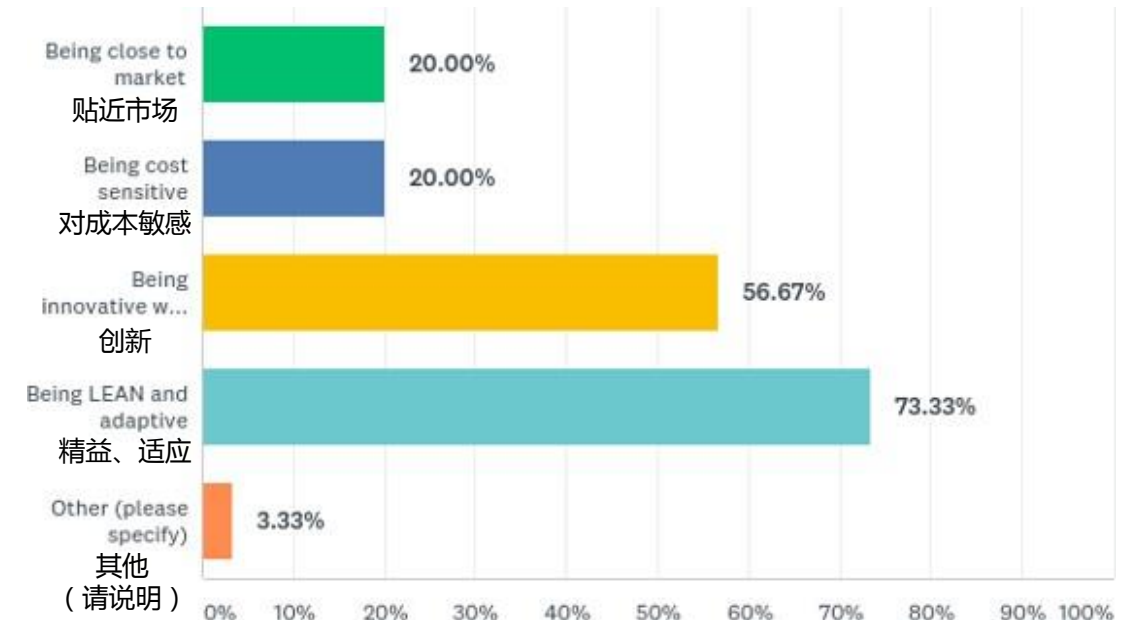


# SUPPLY CHAIN TRANSFORMATION AFTER THE PANDAMIC

## 疫情后的供应链转型



- Over 70% will work on a lean and adaptive supply chain.
- 超过70%的人将采用精益和适应性的供应链。
- over 55% are looking for innovative ways to cope with disruption.
- 超过55%的人正在寻找创新思路来应对混乱。
- 20% want to be close to market & cost sensitive.
- 20%的人希望贴近市场，对成本敏感。
- Still close to 40% don't want to reframe their sourcing priorities after the pandemic while 30% will look for a regional centric sourcing or global market centric sourcing.
- 仍有近40%的人不想在疫情爆发后重新制定采购优先顺序，而30%的人将寻找以区域为中心的采购或以全球市场为中心的采购。
- A little over 15% want to opt for local for local sourcing. Also, some respondents have not yet the answer to this question.
- 略高于15%的人希望选择本地采购。另外，一些受访者没有回答这个问题。

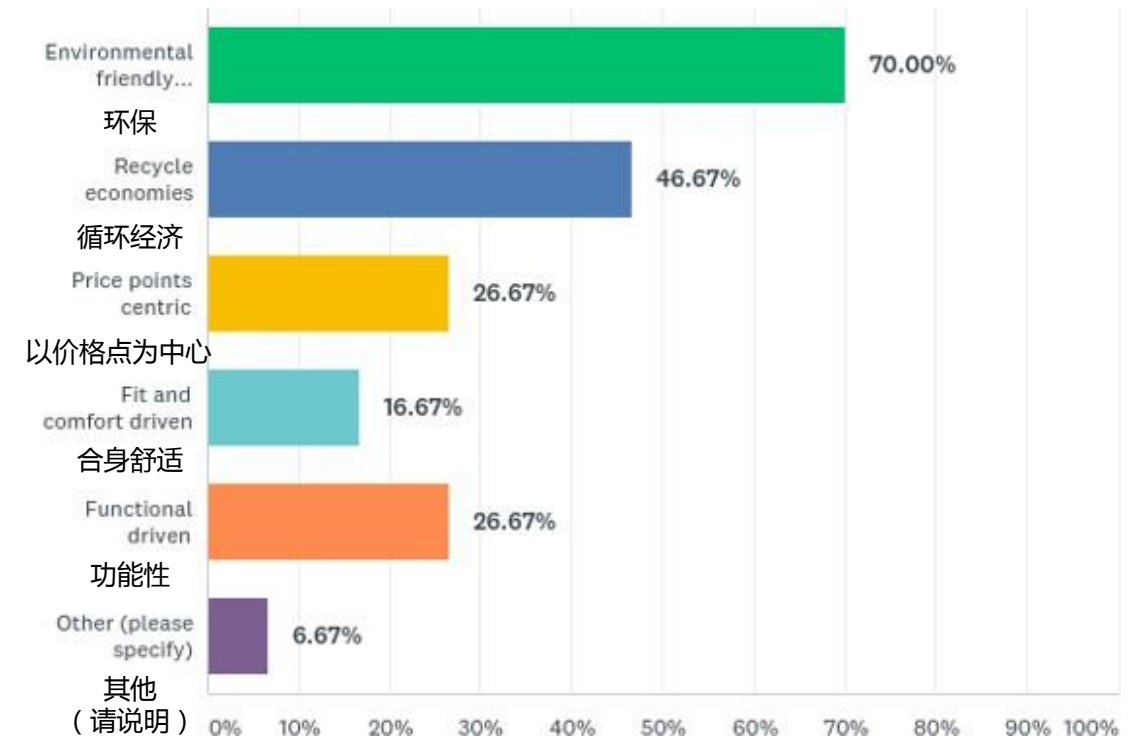


# EMERGING MARKET TRENDS POST COVID-19

## 疫情后的新兴市场趋势



- Sustainability will remain a key industry driver post COVID-19.
- 疫情过后，可持续性仍将是一个关键的行业驱动力。
- 70% consider environmental friendly products to be the most important market trend after the pandemic.
- 70%的人认为环境友好型产品是疫情后最重要的市场趋势。
- In addition, 46% of respondents thought that the most important trend would be recycle economies.
- 46%的人还看重循环经济。
- Around 25% see functional driven and price points centric developments as important.
- 大约25%的人认为功能驱动和以价格点为中心的开发非常重要。

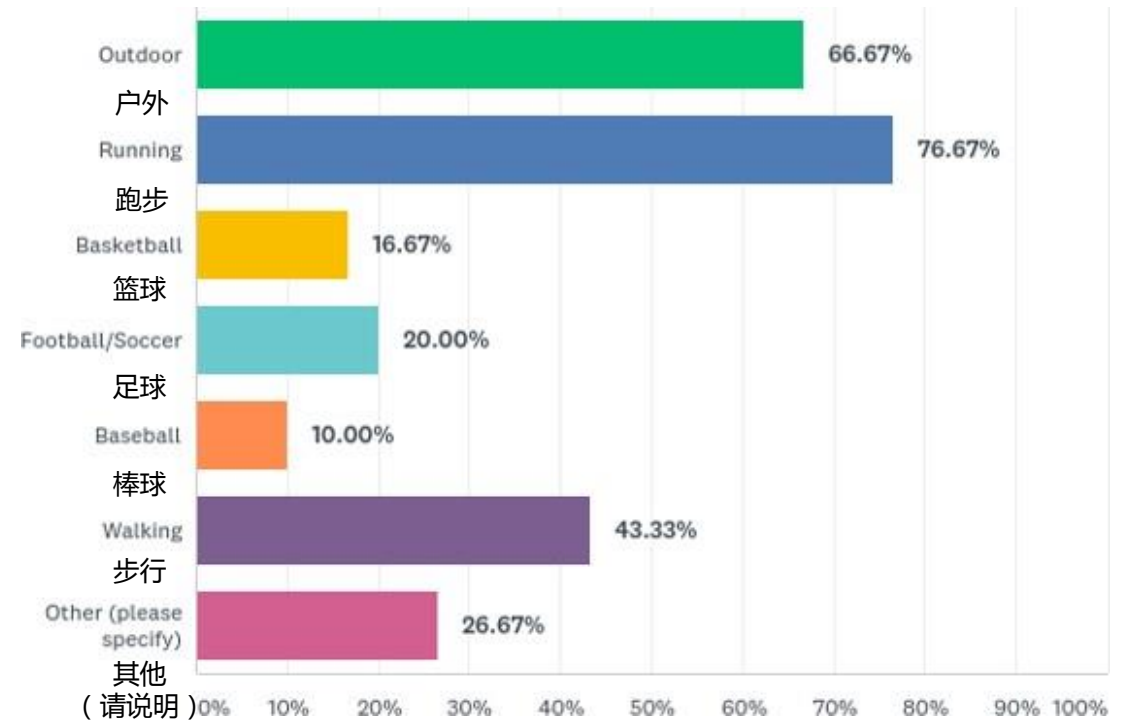


# PREVAILING SPORTS AFTER THE PANDEMIC

## 疫情后的流行运动



- The industry was split on which sports would be most prevalent post COVID-19.
- 疫情过后，整个行业对哪项运动将受欢迎的看法出现了分化。
- Around 70% of respondents see running and outdoors as the most appealing sports after the pandemic.
- 大约70%的受访者认为跑步和户外运动是疫情过后最受欢迎的运动。
- A little less than 50% consider walking to be practiced most after the pandemic.
- 有不到50%的人认为，在疫情之后，步行是最常见的锻炼方式。
- Around 20% consider basketball and soccer to take that position.
- 还有大约20%的人认为是篮球和足球。
- Finally, cycling is also seen as a popular activity after the pandemic.
- 最后，自行车运动也被视为疫情后的一项流行运动。





# NEXT SURVEY MAY 2020 下次调研 – 2020年5月



Want to support us by filling in the next survey edition? It takes you less than 3 minutes, many thanks!  
想通过填写下一个调研版本来支持我们吗？只用不到3分钟，感谢！

**<https://www.surveymonkey.com/r/7VF7FW8>**

ANYTHING WE CAN DO FOR YOU IN THESE TROUBLED TIMES?

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

**WFSGI – World Federation of the Sporting Goods Industry**

Haus des Sports, Talgut-Zentrum 27, 3063 Ittigen/Bern, Switzerland

Phone +41 31 939 60 61

[www.wfsgi.org](http://www.wfsgi.org), E-mail: [mmagnus@wfsgi.org](mailto:mmagnus@wfsgi.org)