

**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**

**May 2020 2020年5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



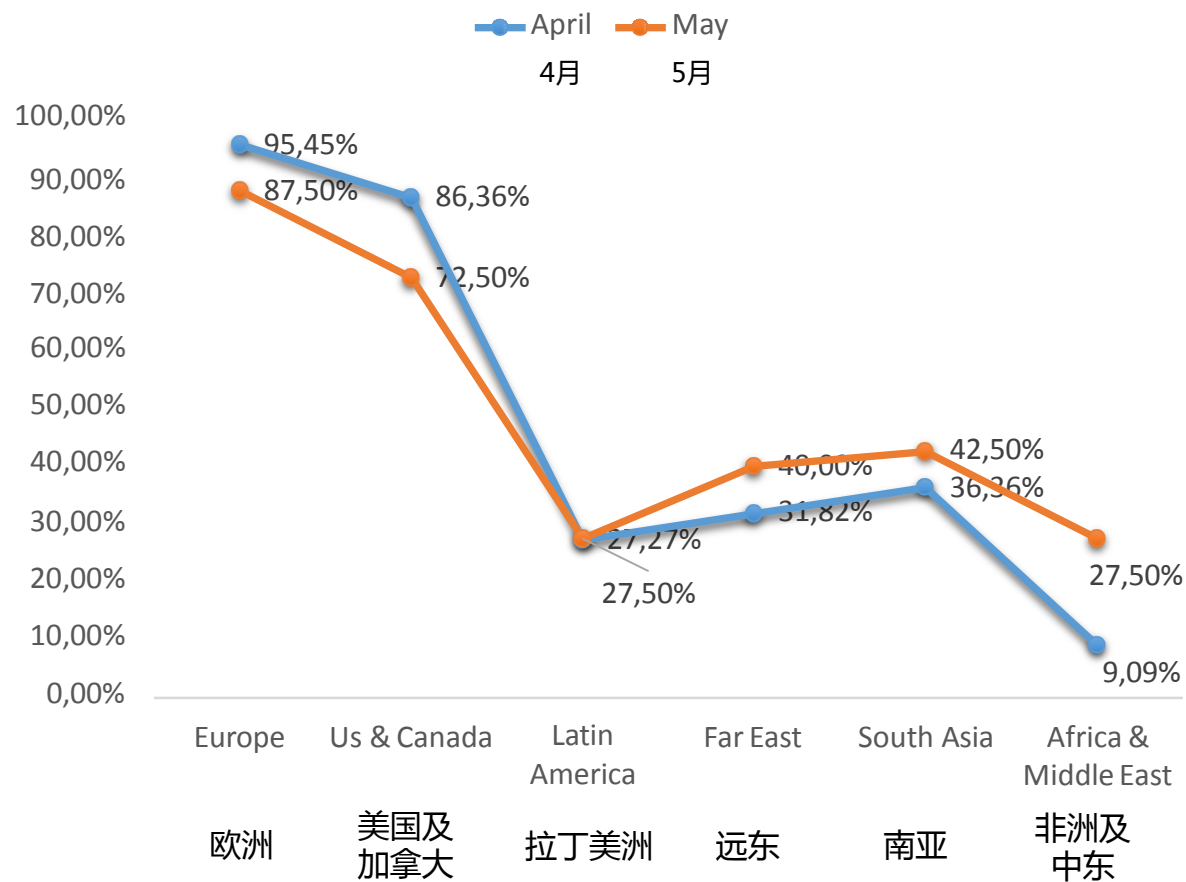
# DEMAND: PERSISTING SIGNIFICANT ORDER DECREASE

## 需求：订单持续大幅减少



- Around 80% of respondents see decreasing orders from customers in Europe and the Northern America.
- 约80%的受访者认为来自欧洲和北美客户的订单有所减少。
  - **Compared to last month, the situation for Europe and Northern American has slightly improved around 10%.**
  - 与上月相比，欧洲和北美的情况略有改善，订单恢复了10%。
- 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。
  - **While the situation remains the same for Latin America, it worsened for Far East, South Asia, and the African & Middle East region.**
  - 尽管拉丁美洲的情况依然如此，但远东、南亚和非洲及中东地区的情况却恶化了。

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





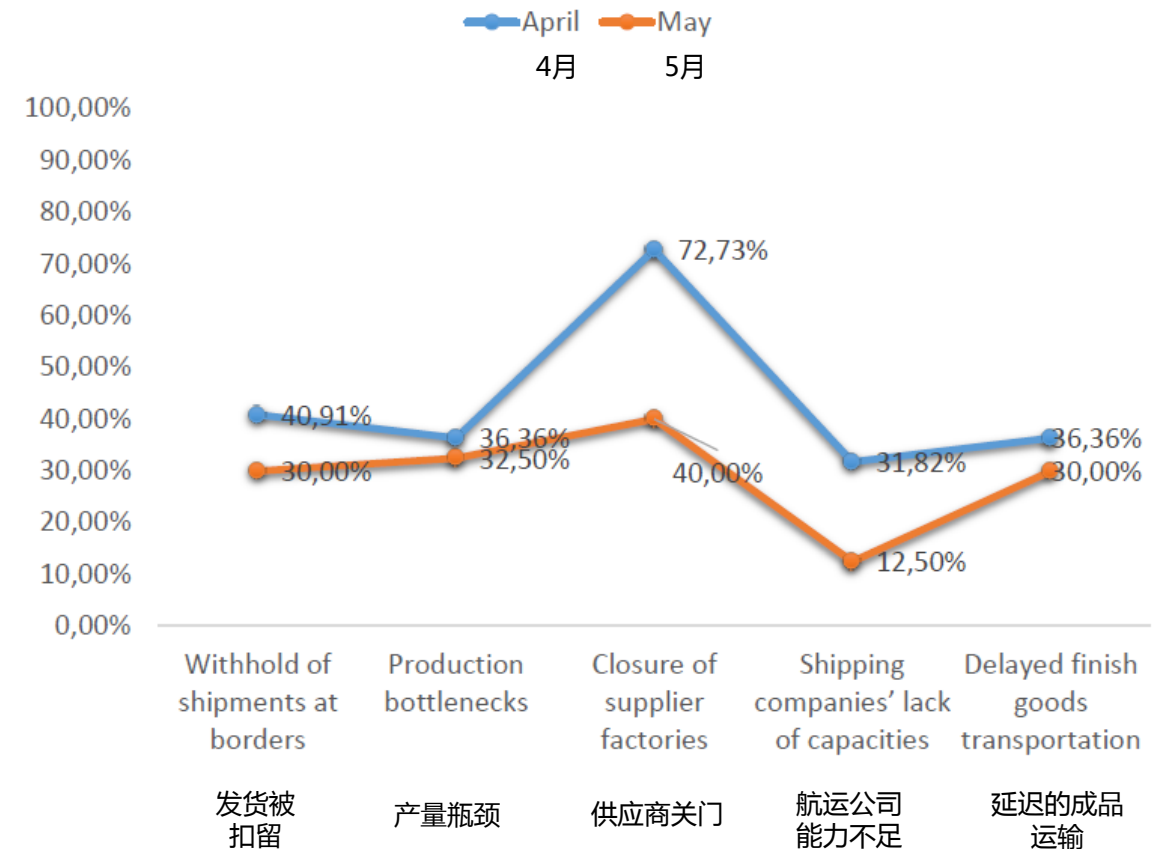
# LOGISTICS: MATERIAL SHORTAGE LESS OF AN ISSUE

## 物流：物料短缺不再是问题



- 50% of respondents face material shortage.
- 50%的受访者面临材料短缺。
  - **The situation around closed factories has improved: Nearly 50% less respondents than last month see this an issue.**
  - 关闭工厂的情况有所改善：与上月相比，反馈这一问题的受访者减少了一半。
  - **The same applies for shipping companies 50% less respondents face shipping capacities than last month.**
  - 受访者在航运公司能力不足的困扰也有所改善，与上月相比减少了约一半。
- Around 30% face issues due to shipments being withhold, production bottlenecks or delayed finish goods transportation.
- 大约30%的人面临着由于发货被扣留、生产瓶颈或成品运输延迟而产生的问题。

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



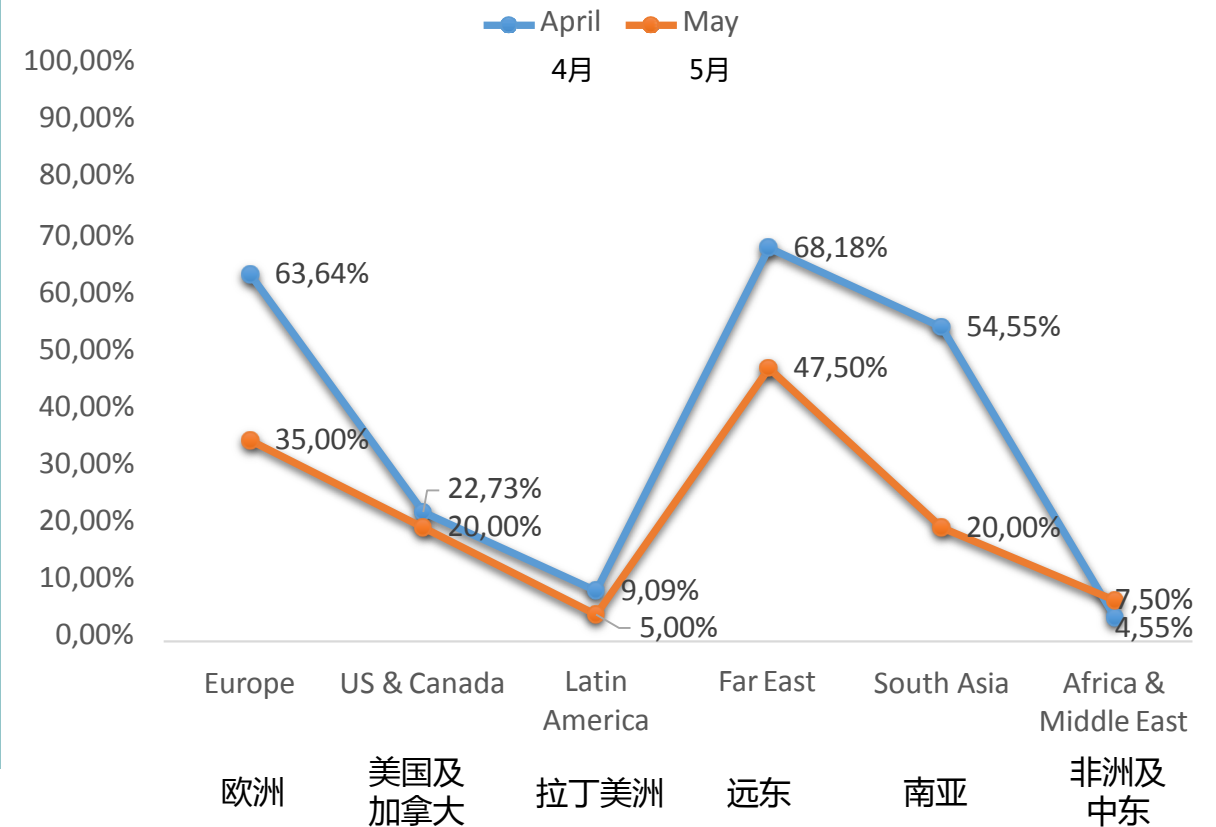
# SUPPLY: GLOBAL SHIFT OF SUPPLY CHAIN DISRUPTION

## 供应：供应链中断的全球转移



- 70% of respondents face supply chain disruption: mostly affected in Far East (47%), followed by Europe (35%), South Asia and Northern America (both 20%).
- 70%的受访者面临供应链中断：主要受影响的是远东地区（47%），其次是欧洲（35%）、南亚和北美（均为20%）。
  - The number of respondents facing disruption in South Asia has dropped by more than 30%. Also, half as many respondents face disruption in Europe compared to last month and 20% less respondents face disruption in Far East.**
  - 反馈南亚面临中断的受访者数量下降了30%以上。此外，与上月相比，在欧洲面临中断的受访者减少了一半，在远东地区面临中断的受访者减少了20%。

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



# LABOR: PARTIAL SHORTAGE OF LABOR

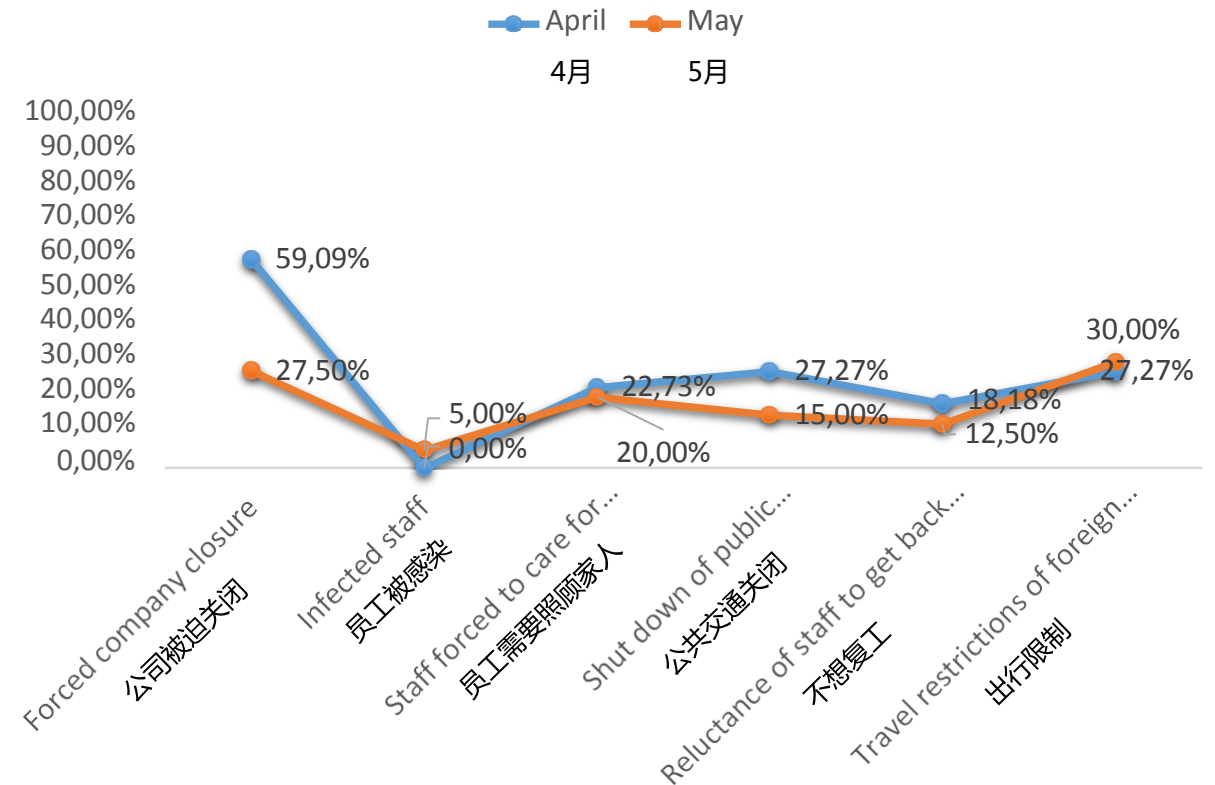
## 劳工：部分劳动力短缺



- 50% do not see any labor shortage.
- 接近半数的受访者不再面临劳动力短缺。
  - **The number of respondents facing forced company closure has dropped by more than 50% since last month.**
  - 自上月以来，面临被迫关闭公司的受访者数量下降了50%以上。
  - **Also, shut down of public transportation is a problem for nearly half as many respondents compared to last month.**
  - 由于公共交通的关闭而面临劳动力短缺的受访者数量与上月相比也减少了一半。

### 劳工短缺的原因是

Are you confronted with shortage of labors due to:





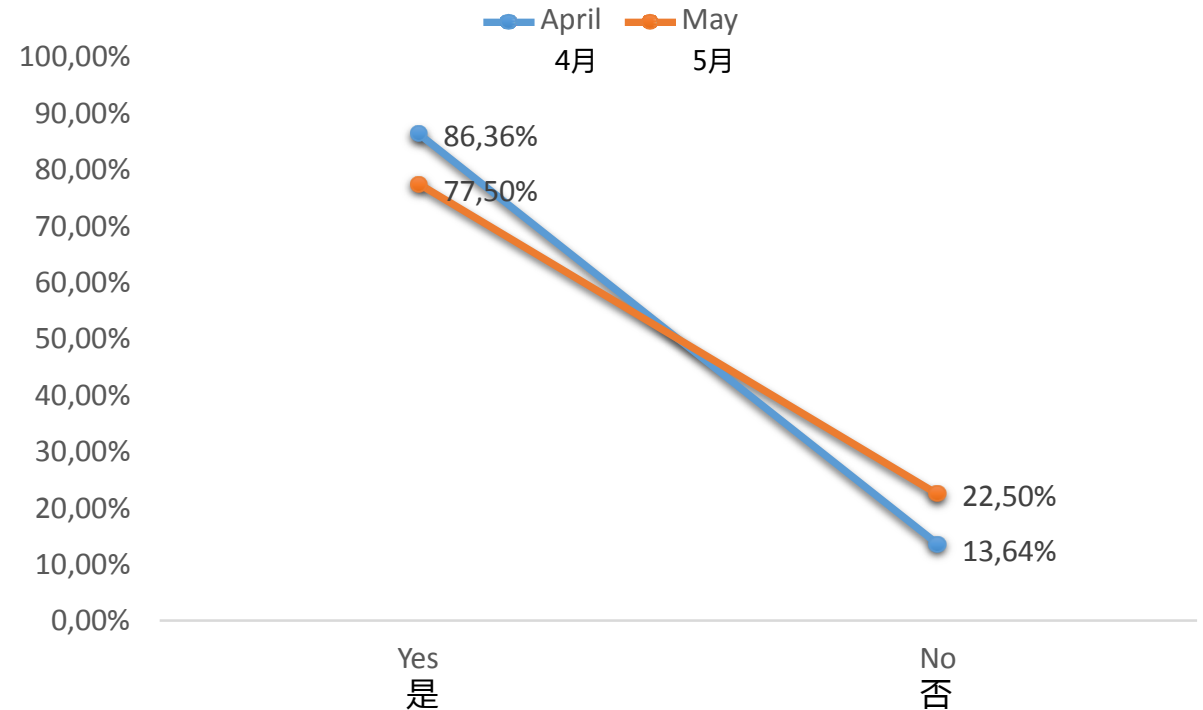
# LEGAL: STILL IMPORTANT COVID-19 REGULATORY MEASURES

## 法规：仍然重要的疫情相关监管要求



- Over 77% are impacted by specifically implemented regulations due to the COVID-19 pandemic.
- 由于疫情爆发，超过77%的受访者受到具体实施的监管的影响。
  - **This is a slight decrease of a little less than 10% compared to last month.**
  - 与上月相比，降幅略低于10%。

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: CASH FLOW ISSUES SLIGHTLY DECREASED

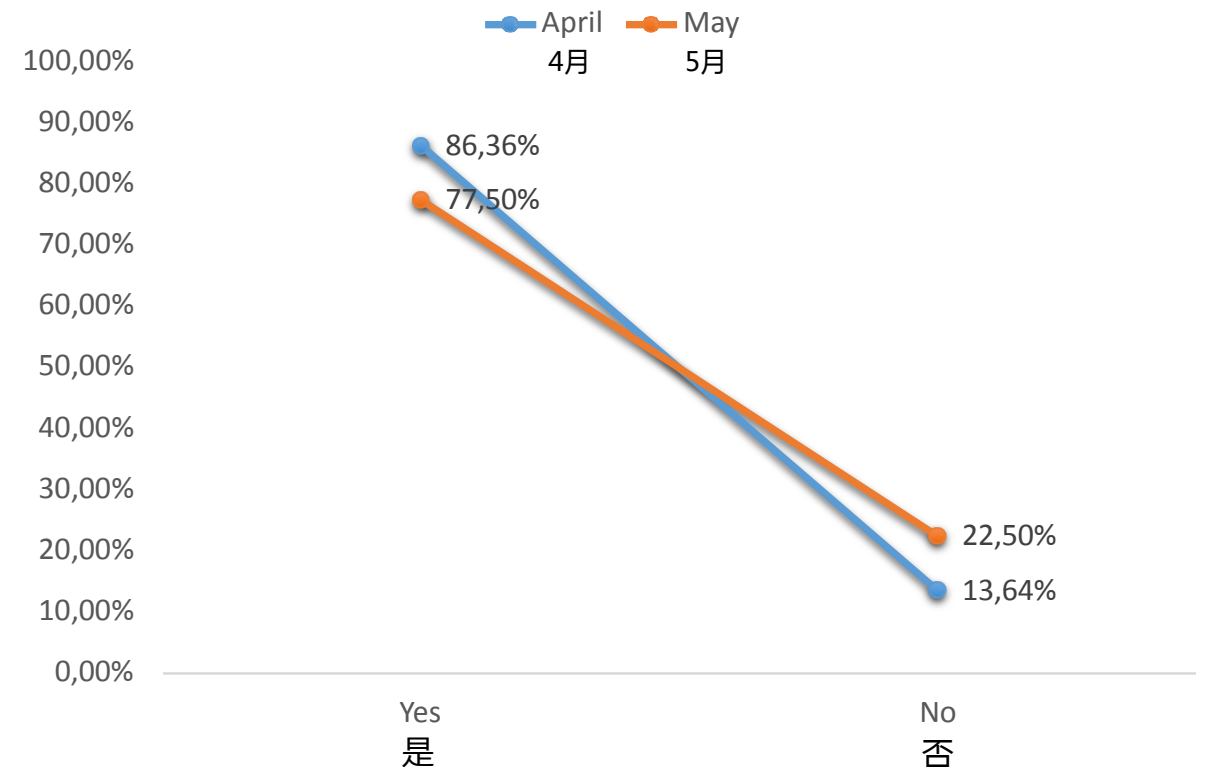
## 财务：现金流问题略有改善



- Over 77% are challenged by low cash flow.
- 超过77%的人面临着现金流不足的挑战。
  - **This is a slight decrease of a little less than 10% compared to last month.**
  - 与上月相比，降幅略低于10%。
- There are still a little over 22% not facing any cash flow issues.
- 仍有超过22%的人表示没有面临任何现金流问题。

### 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?



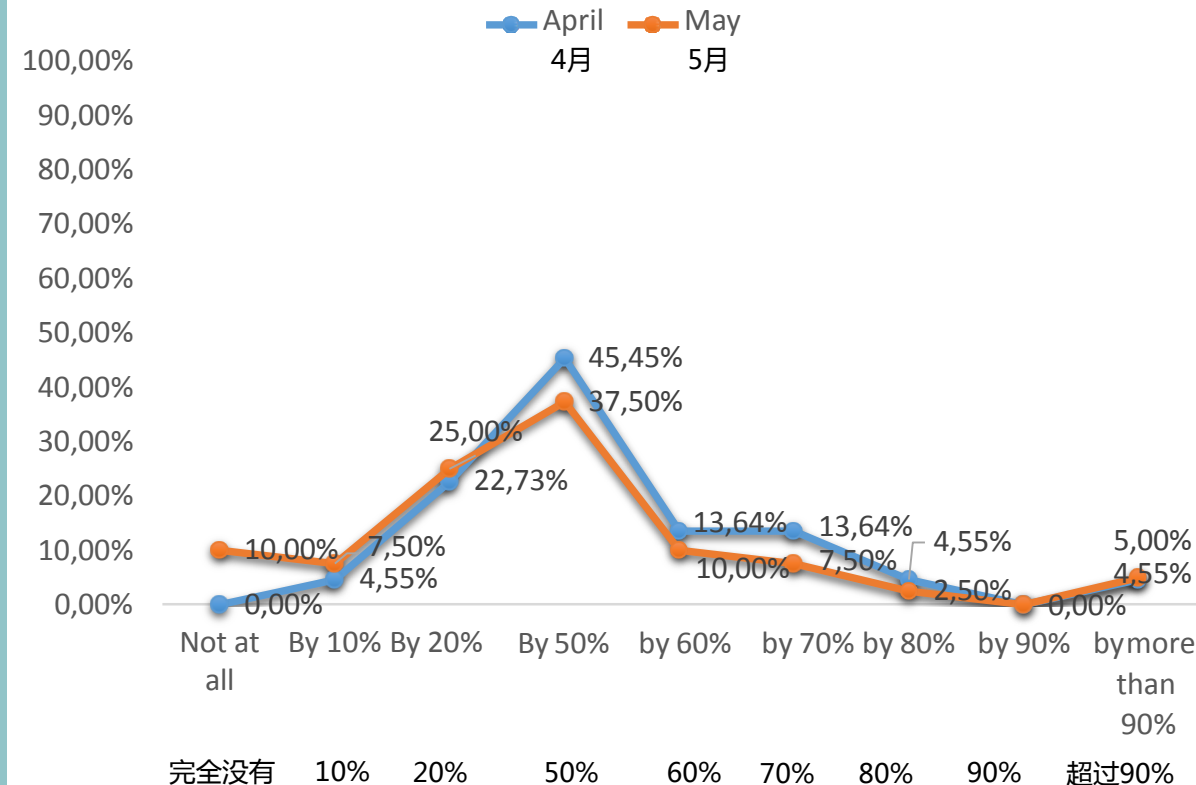
# BUSINESS FORECASTING: GLOBAL SLUMP NEARLY UNCHANGED

## 业务预测：全球经济衰退并未改善



- COVID-19 is forecast to impact 90% of respondent's business.
- 90%的受访者预测疫情对他们的业务产生了影响。
- Most of them, close to 37%, see their business dropping by 50% in the upcoming month.
- 他们中有近37%的人，推测其业务将在下个月下降50%。
  - That's a drop of over 10% compared to last month.**
  - 该数字与上月相比，降幅超过10%。
  - There are still 10% people expecting no change in their business compared to zero last month.**
  - 在上月的结果中，无人表示业务完全没有受到影响。本月有10%的人推测，他们的业务不会发生变化。
- The most affected regions for respondents remain Europe where 80% see a drop of their business and Northern America with 70%.
- 受访者受影响最大的地区仍是欧洲，有80%的人表示遭遇业务下滑。其次为北美地区，有70%的人受到影响。
  - That's a slightly more optimistic (-15% for Europe and -7% for Northern America) than last month.**
  - 这些结果比上月的数据乐观，欧洲地区下降了15%，北美地区下降了7%。

**您认为业务会在下月下降么？**  
**Do you see your business dropping in the upcoming month:**





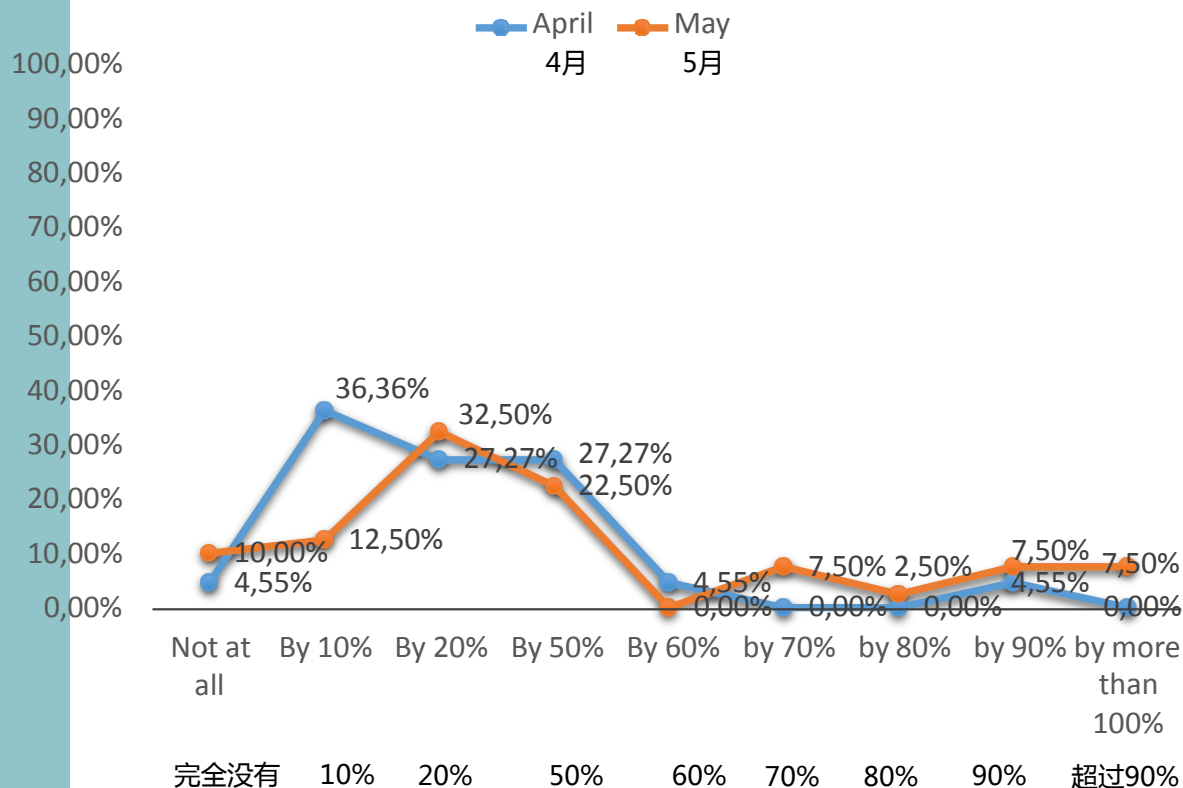
# BUSINESS FORECAST: SLOW & PARTIAL RECOVERY

## 业务预测：缓慢、部分复苏



- 10% do not expect any recovery.
- 10%的受访者预测，经济不会复苏。
  - Industry confidence regarding the future outlook and recovery has changed compared to last month as more than double the number of last month don't expect a recovery.**
  - 与上月相比，业内对未来前景和复苏的信心发生了变化。预测经济不会复苏的人数是上月数字的两倍以上。
  - Only one third of last month's respondents (12%) expect that their business will rebound by 10%.**
  - 预计业务将恢复10%的受访者仅为上月结果的三分之一（12%）。
- The percentage of respondents expecting their business to recover by 20% and 50% remains roughly the same as last month.
- 预计业务将恢复两成和五成的受访者比例与上月结果基本持平。
  - While there were 4.5% seeing their business to recover by 90% last month, there are nearly double as much this month. Also, 7.5% of respondents expect a recovery of 70% and more than 100% compared to 0% last month.**
  - 在上月的结果中，有4.5%的人预计他们的业务将恢复到平时的90%，本月的数字几乎翻倍。另外，7.5%的人预计他们的业务将恢复到平时的70%。不同于上月的无人有信心业务将100%恢复到疫情前的水平，该数字也有显著增长。
  - Compared to last month double the number of respondents think that they will need more than one year to recover.**
  - 与上月相比，多一倍的受访者认为他们需要一年以上的时间才能恢复。

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: KEY INSIGHTS

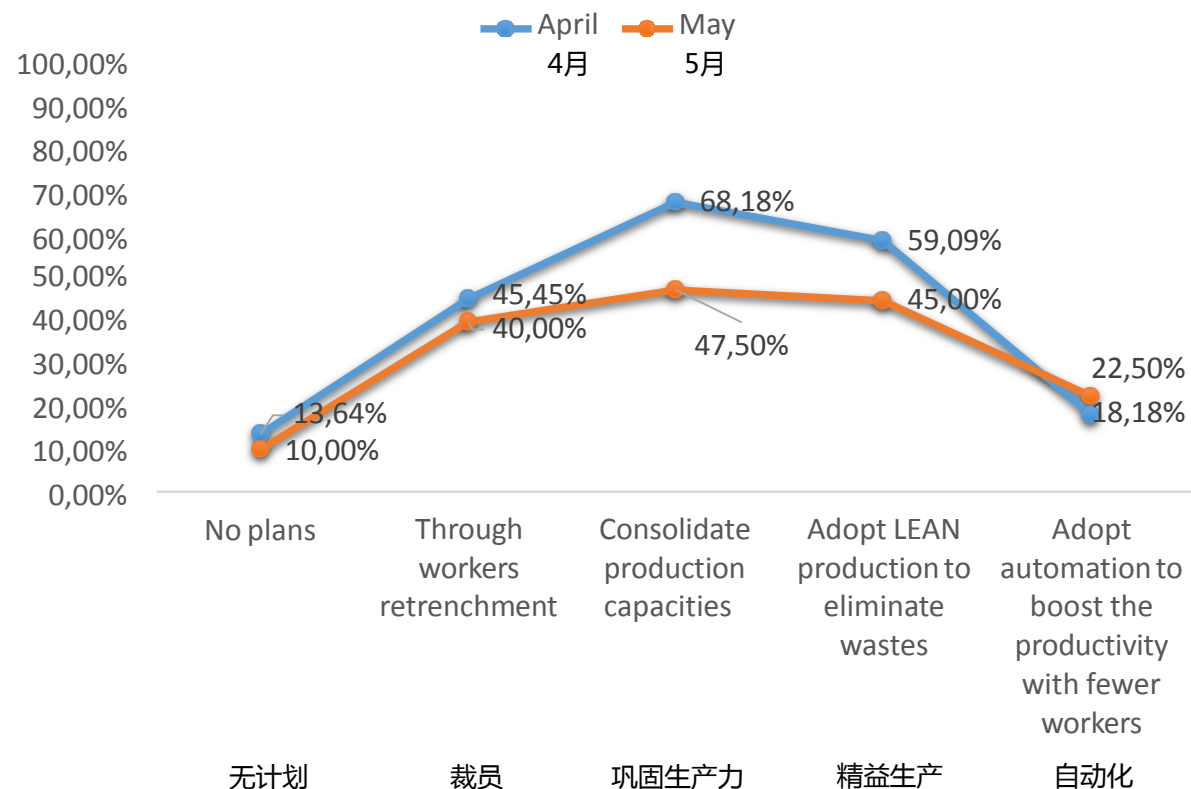
## 所采取的措施：重要见解



- Close to 50% will consolidate production capacities as a response to the pandemic. 45% will focus on adopting lean production to eliminate waste.
- 为应对疫情，近50%的受访者将巩固生产力。45%的公司将致力于精益生产从而减少浪费。
  - **These percentages went down by around 15% compared to last month.**
  - 这些数字与上月相比下降了约15%。
- 5% less than last month will need to look into worker retrenchment.
- 考虑裁员问题的受访者比例较上月下降了5%。
  - **The number of respondents considering automation remains the same.**
  - 决定采取自动化的受访者比例持平。
- Compared to last month only 10% have no specific plans in place.
- 本月份仅有10%的受访者没有应对方案。
  - **That's nearly 5% less.**
  - 该数字降低了5%。

### 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: MINIMUM INVENTORIES MATTER MORE

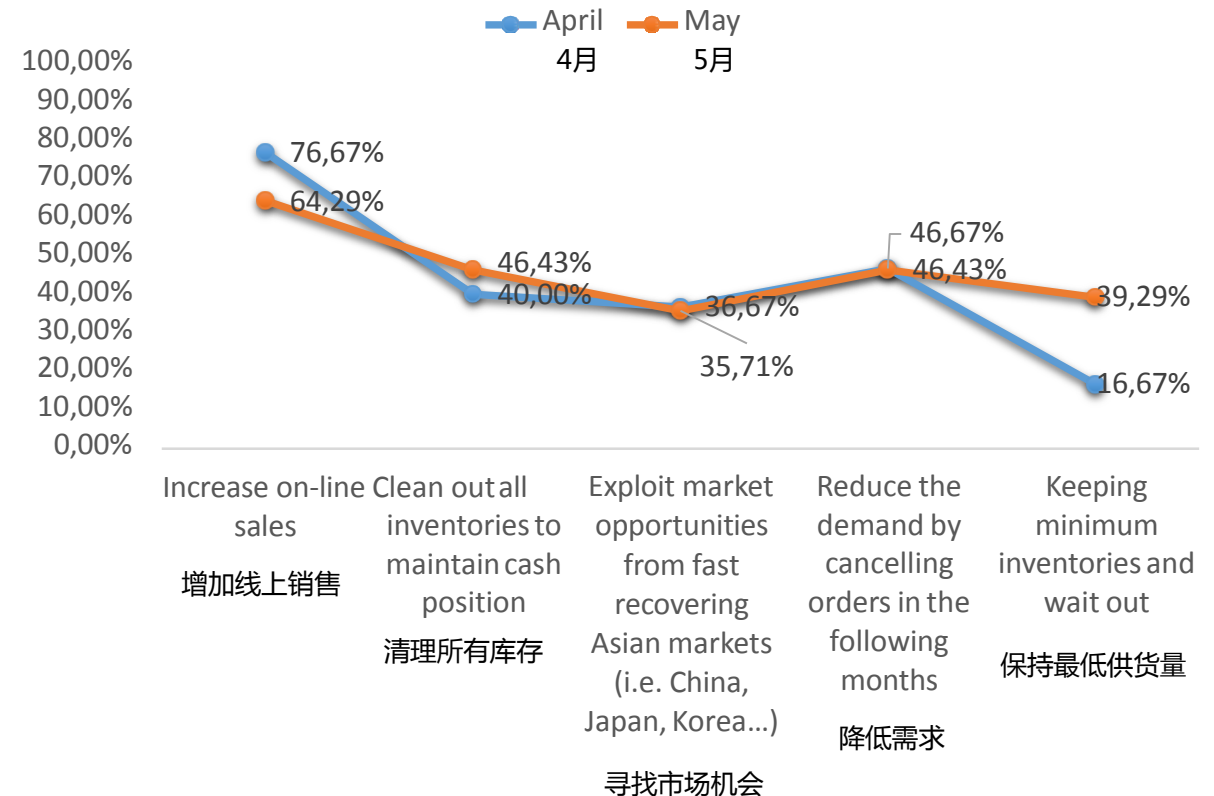
## 减轻影响：保持最低库存更为重要



- 64% want to increase their on-line sales.
- 接近64%的人希望增加在线销售。
  - That's a drop of 10% compared to last month.**
  - 该数字较上月下降了10%。
- The percentage of respondents who opt for keeping minimum inventories and wait out has sky-rocked from 16 to 40 %.**
- 选择保持最低库存并等待的受访者比例从16%飙升至40%。
- Other strategies seem to remain at the same level of importance.**
- 其他战略似乎有着相同的重要性。

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: LOWER BUSINESS VOLUME BUT KEEPING SUPPLIERS

## 后果：减少业务量但保留供应商

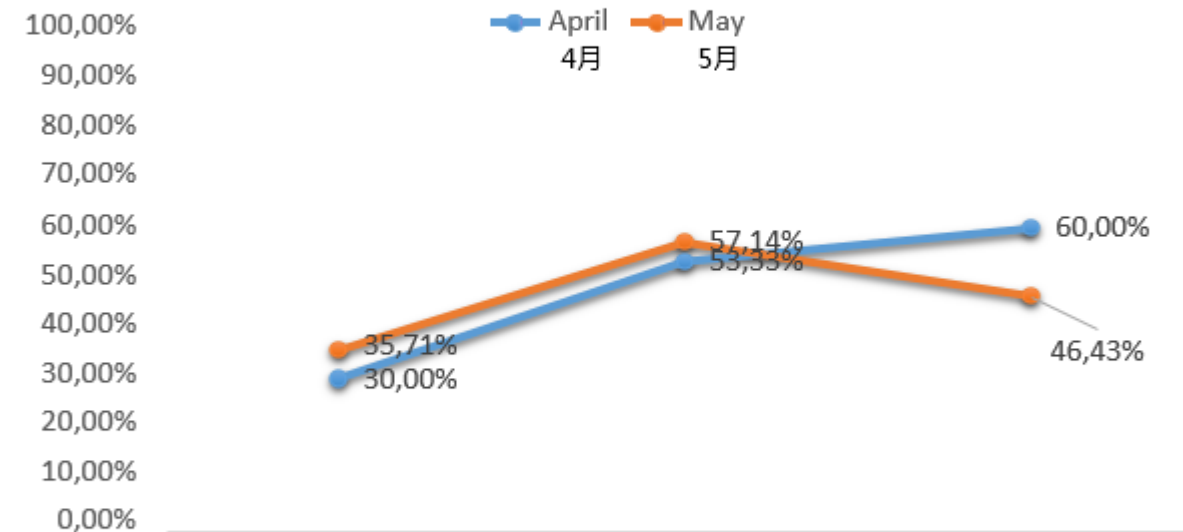


The figures remain basically the same as last month regarding possible repercussions.  
本月结果与上月相仿。

- Close to 60% will decrease the business volume for each of their supplier but try to provide business for all of them.
- 近60%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。
- **From a financial perspective there are 15% less expecting deferred payments compared to last month.**
- 从财务角度看，与上个月相比，预期的延期付款减少了15%。

缓解策略对供应商有何影响？

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



Consolidate the supply base and keep only strategic partners

巩固供应基础，只保留战略合作伙伴

Share the pains by keeping the same supply base but less business volume for each

维持现有的供货商结构，但减少每个供应商的业务量

Deferred payment flows  
延迟支付

# PRIORITIES: KEY INSIGHTS REMAIN UNCHANGED

## 侧重点：重点见解保持不变



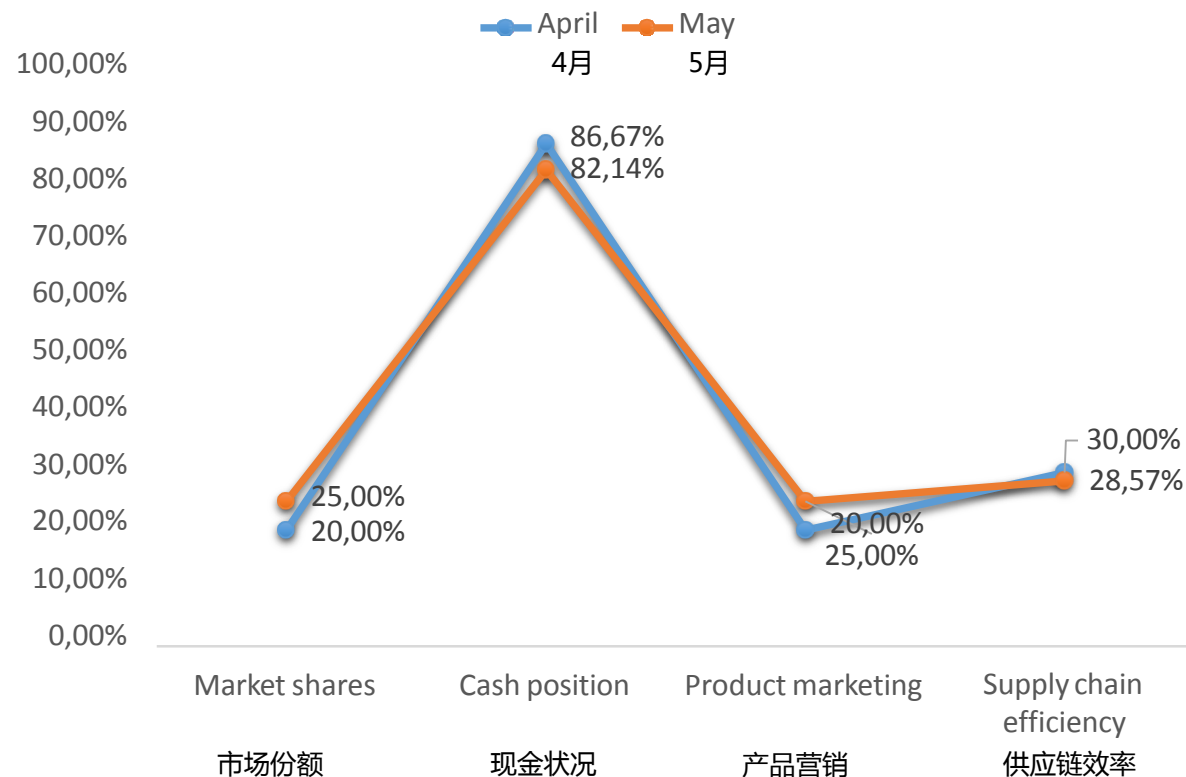
The trend remains the same for the priorities of respondents compared to last month:

本月结果揭示的趋势与上月相仿。

- Over 80% will focus on cash position while 30% are increasing their supply chain efficiency.
- 超过80%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。
- 25% will look in to product marketing and market shares.
- 25%将关注产品营销和市场份额。
  - Respondents have mentioned employees' health as a new focus.
  - 受访者提及的员工健康是一个新的关注点。

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: INCREASING REQUEST FOR STABILITY

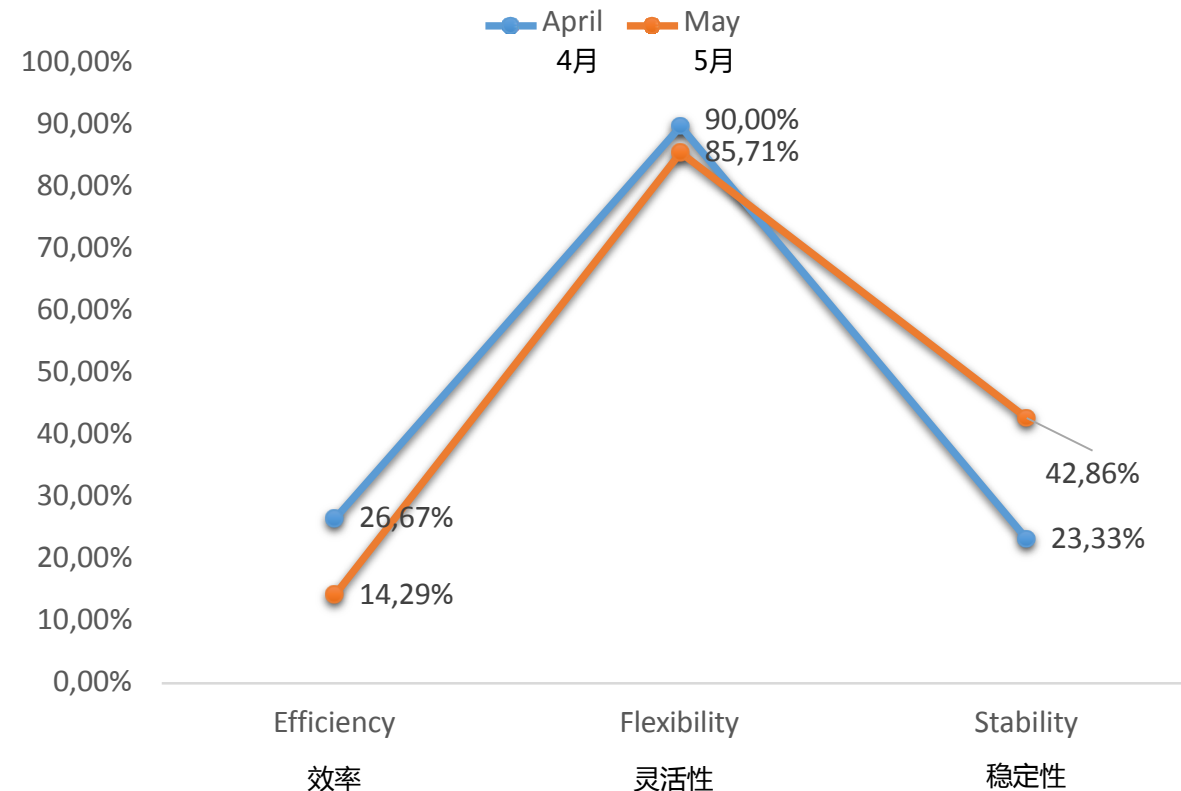
## 对供应商的期望：对稳定的要求越来越高



- Most respondents, 85%, are welcoming flexible suppliers while around 25% are awaiting efficiency.
- 大多数受访者（85%）喜欢灵活的供应商，约25%的受访者看重效率。
  - **Compared to last month the importance of stability has significantly increased from 23 to over 42 percentage.**
  - 与上月相比，稳定的重要性已从23%显著增加到42%以上。

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?



# FLEXIBLE AND STABLE SUPPLY CHAIN TRANSFORMATION

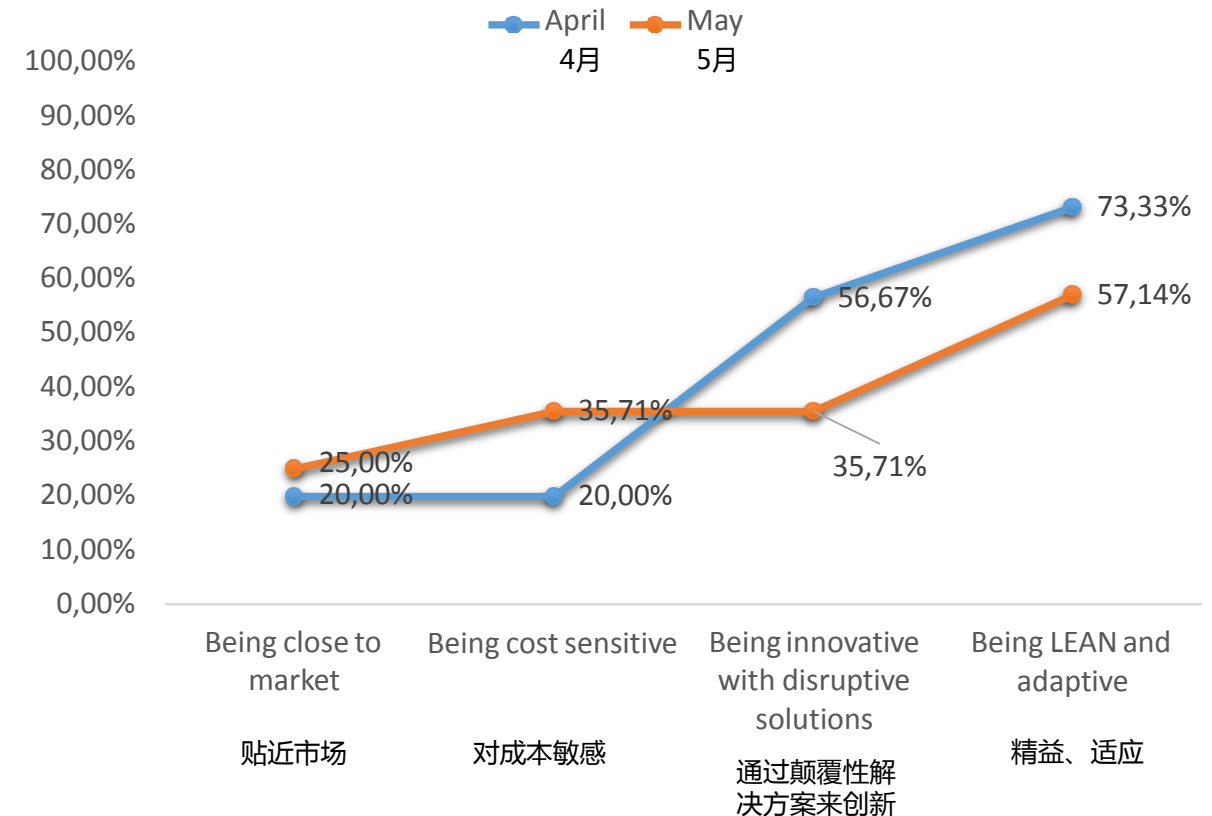
## 灵活稳定的供应链转型



- Last month being lean was chosen by three quarters of respondents.
- 在上月的结果中，约四分之三的受访者选择采用精益和适应性的供应链。
  - **This month shows a strong assimilation of the answers.**
  - 本月结果与上月相仿。
  - **Being cost sensitive has gained in importance, as nearly double the respondents opted for this answer.**
  - 对成本敏感已经变得越来越重要，本月数字几乎是上月的两倍。
  - **Innovation and disruptive solutions are only for 35% percentage an option whereas still over 56% opted for this solution last month.**
  - 创新和颠覆性解决方案的选择率仅为35%，而上个月仍有超过56%的人选择了这种解决方案。

### 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?



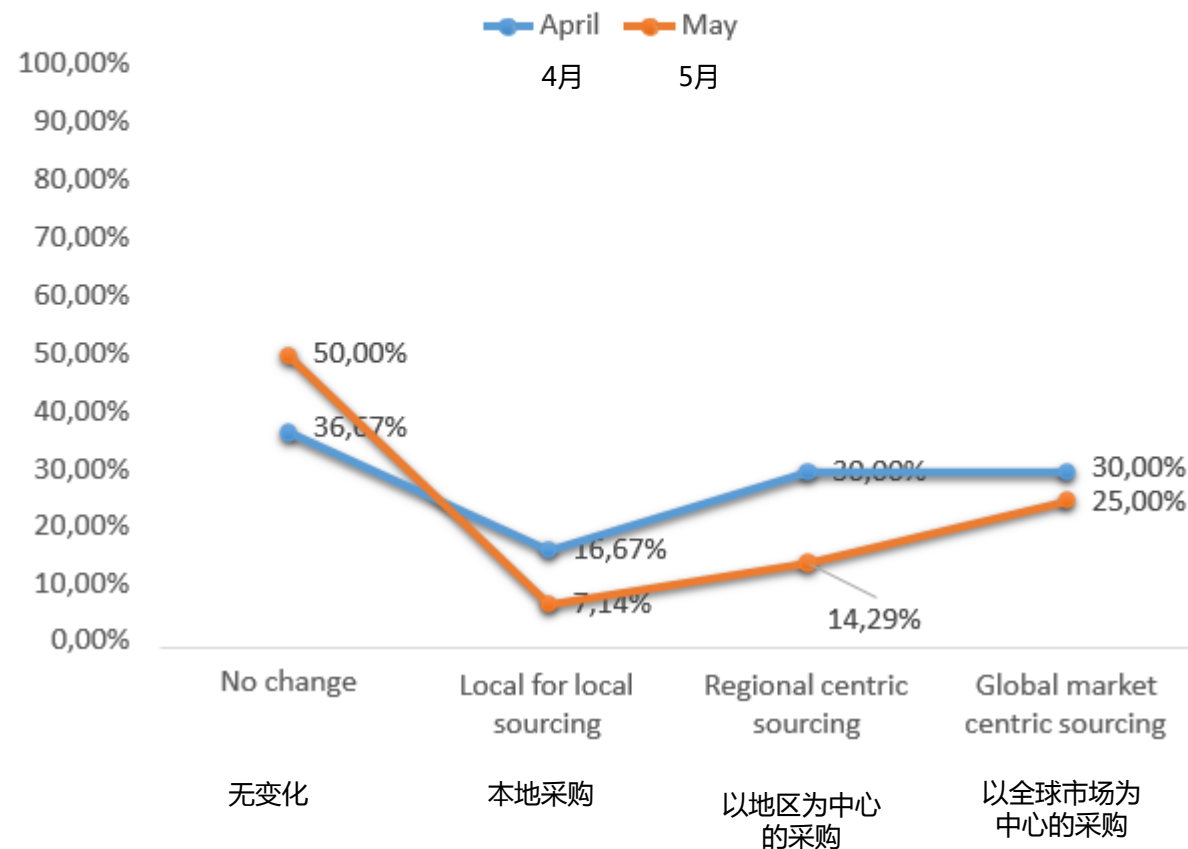
# SOURCING PRIORITIES: DIVIDED APPROACHES

## 采购优先顺序：不同方式



- Half of respondents don't intend to change any sourcing priorities.
- 一半的受访者表示不打算改变任何采购优先顺序。
  - **This is an increase of nearly 15% compared to last month.**
  - 这一数字较上月增长了近15%。
  - **Other changes are that half as many respondents have opted for both local to local and regional centric sourcing.**
  - 其他变化是，一半的受访者将寻找本地采购及以地区为中心的采购。

疫情结束后，您的采购重点是？  
How do you want to reframe your sourcing priorities after the pandemic?



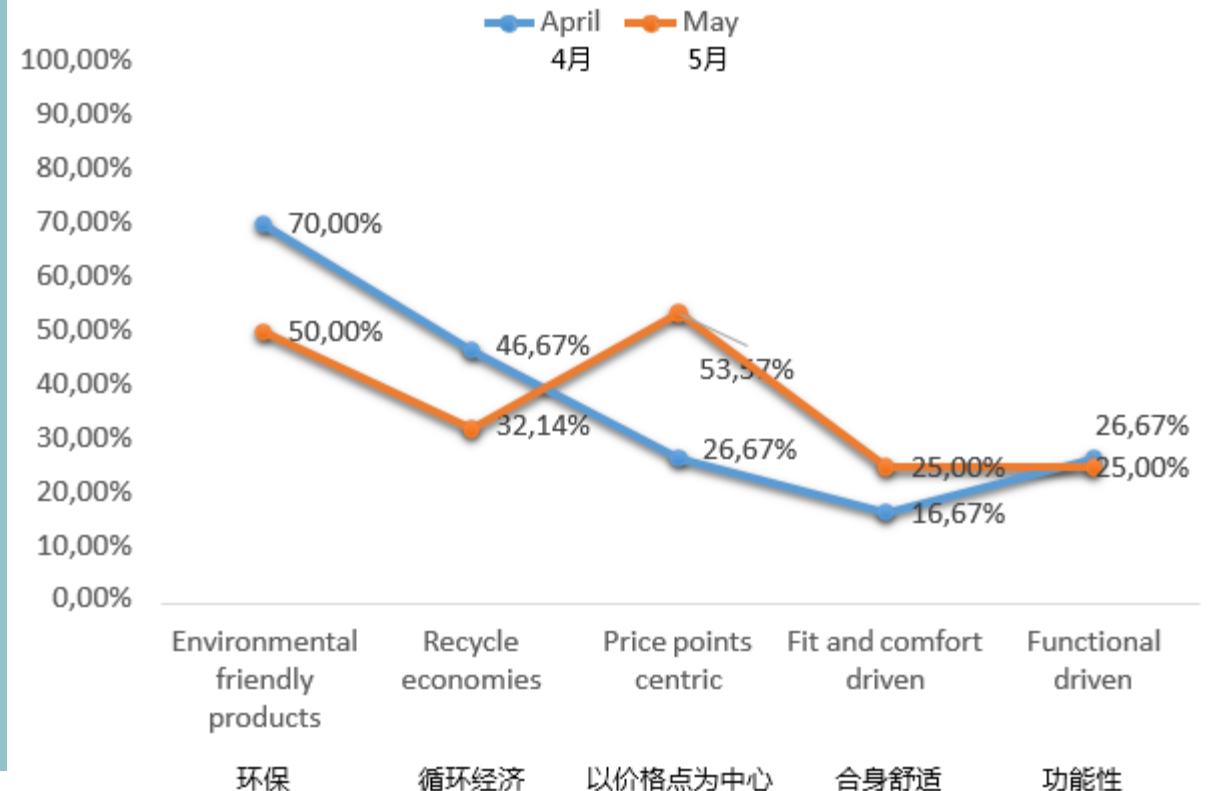


# MARKET TRENDS: SHIFT FROM SUSTAINABILITY TO PRICE SENSITIVE 市场趋势：从可持续性转向对价格敏感



- Sustainability has suffered a loss as only 50% of respondents - compared to 70% last month – consider environmental friendly products as key. Also, recycling remains important for 32%, this is decrease of 14%.
- 由于只有50%的受访者（上月为70%）认为环保产品是关键，行业对可持续性的关注降低了。此外，仍有32%的人看重循环经济，这一比例下降了14%。
- On the other side price point centric measures, chosen by over half of respondents, are double as important as last month.
- 另一方面，超过半数的受访者选择以价格点为中心的措施，其重要性比例是上月数字的两倍。

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



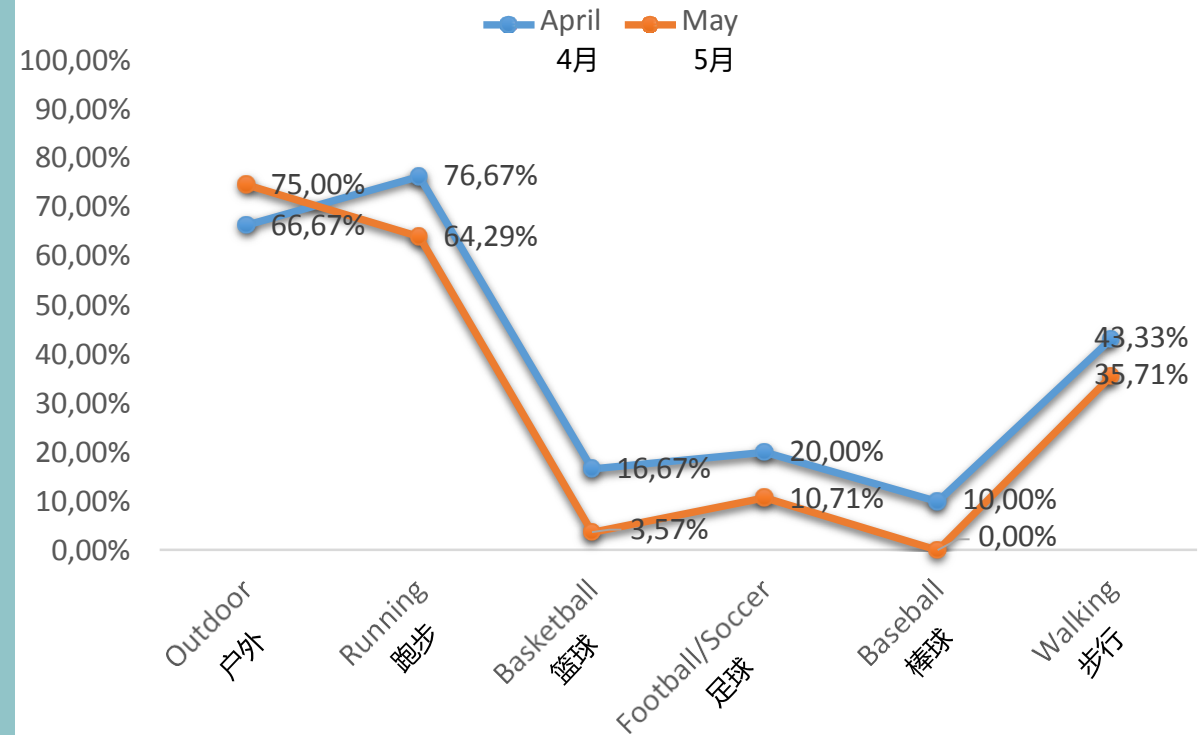
# PREVAILING SPORTS AFTER THE PANDEMIC: NO BIG CHANGE

## 疫情后的流行运动：无明显变化



- 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。
  - **The industry remains 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仍出现分化。
  - **Compared to last month baseball has won in importance as a popular sport after the pandemic.**
  - 与上月相比，棒球在疫后或将成为最受瞩目的运动项目之一。
- Finally, cycling and swimming are also seen as popular activities after the pandemic.
- 最后，自行车运动及游泳也被视为疫情后的流行运动。

您认为疫情结束后，哪种运动将受到欢迎？  
In your view, which product categories will prevail after the pandemic



# NEXT SURVEY JUNE 2020 下次调研 – 2020年6月



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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！

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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

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