

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

June 2020 2020年6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



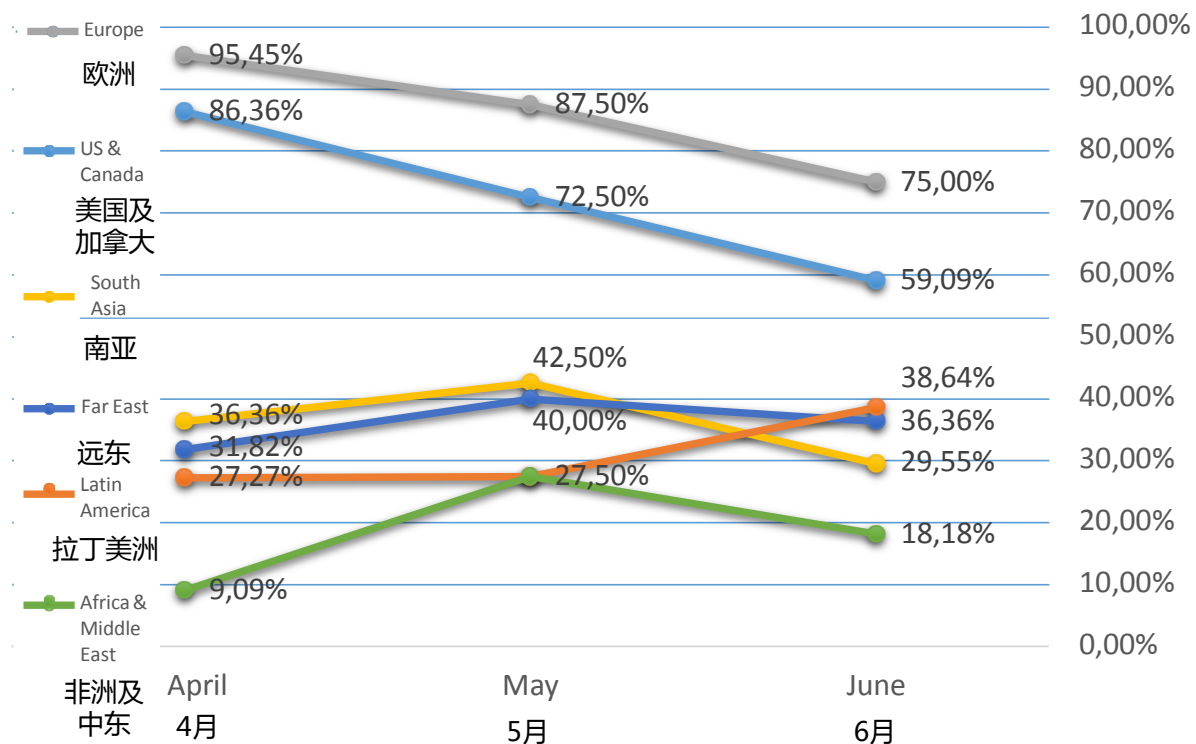
DEMAND: SLIGHTLY LESS ORDER DECREASE

需求：订单减少的情况稍微好转



- The trend shows that the situation is improving in all regions except Latin America where 10% more respondents than last month see a demand decrease.
- 除了拉丁美洲以外，所有地区的情况都在改善，认为拉丁美洲的需求下降的受访者比例较上个月增加了10%。
- For both Europe and Northern America the number of respondents facing demand decrease has dropped by more than 12%.
- 在欧洲和北美，面临需求下降的受访者人数下降了12%以上。

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



LOGISTICS: AGAIN INCREASING MATERIAL SHORTAGE

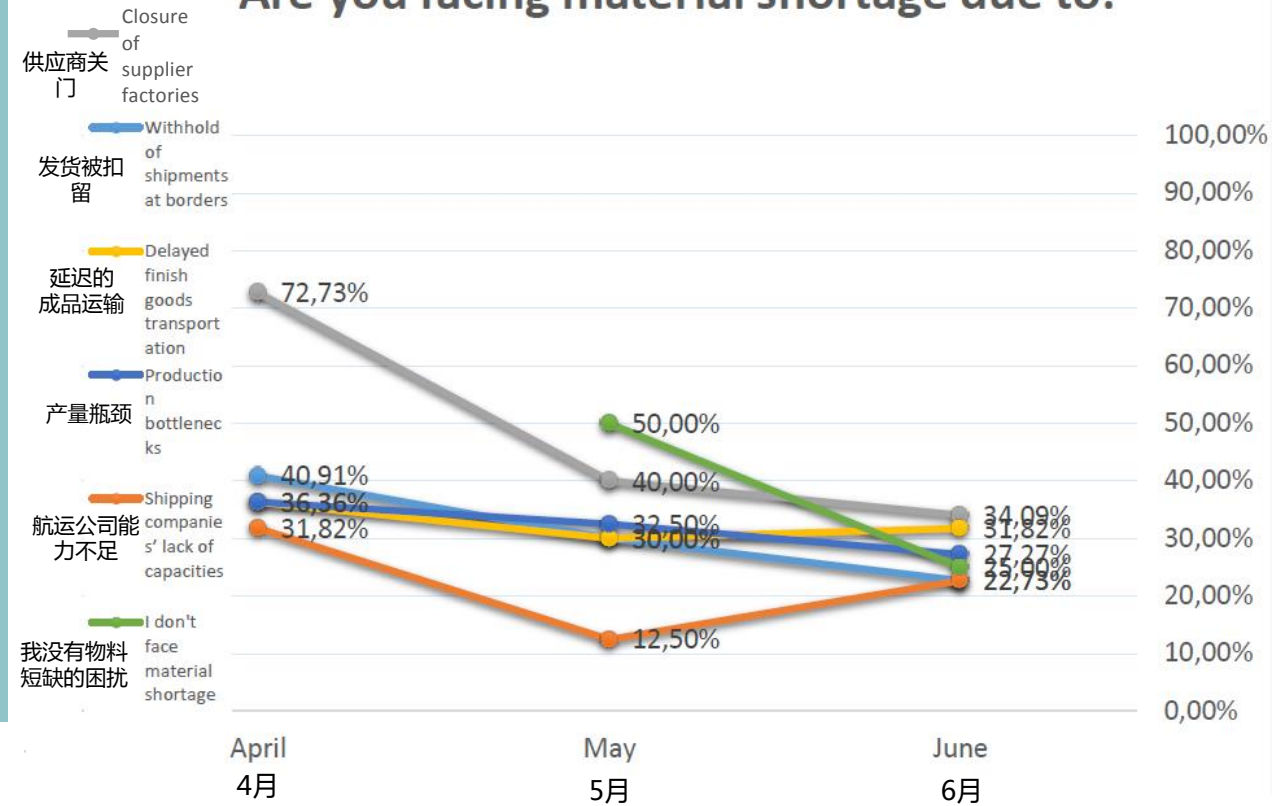
物流：物料短缺再次加剧



- There are double as many respondents facing material shortage compared to last month.
- 面临物料短缺的受访者是上个月的两倍。
- Especially the capacity of shipping companies is more of a problem compared to last month. All other reasons for material shortage are more or less equally important.
- 与上个月相比，航运公司能力不足的问题尤为突出。造成物料短缺的所有其他因素重要程度相近。

物料短缺的原因是

Are you facing material shortage due to:



SUPPLY: SUPPLY CHAIN DISRUPTION REMAINS UNCHANGED

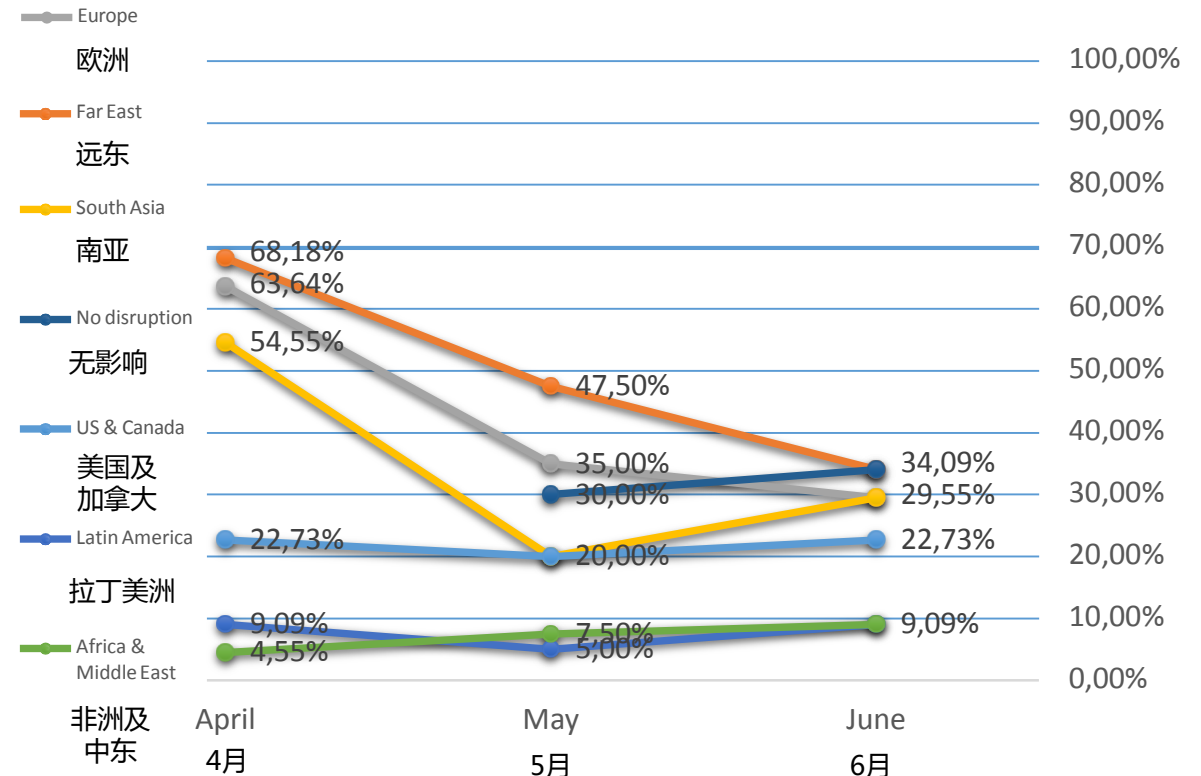
供应：供应链中断的问题并未好转



- The number of respondents facing disruption remains roughly the same.
- 面临中断的受访者人数大致相同。
- Supply chain disruption continues to diminish for Far East and Europe.
- 远东和欧洲的供应链中断现象持续减少。
- In all other regions respondents see a slight increase of their supply chains being disrupted.
- 除上述两个地区外的其他所有区域，受访者认为他们的供应链受到了轻微的中断。

受供应链中断影响的区域是

In which regions do you see your supply chain disrupted:



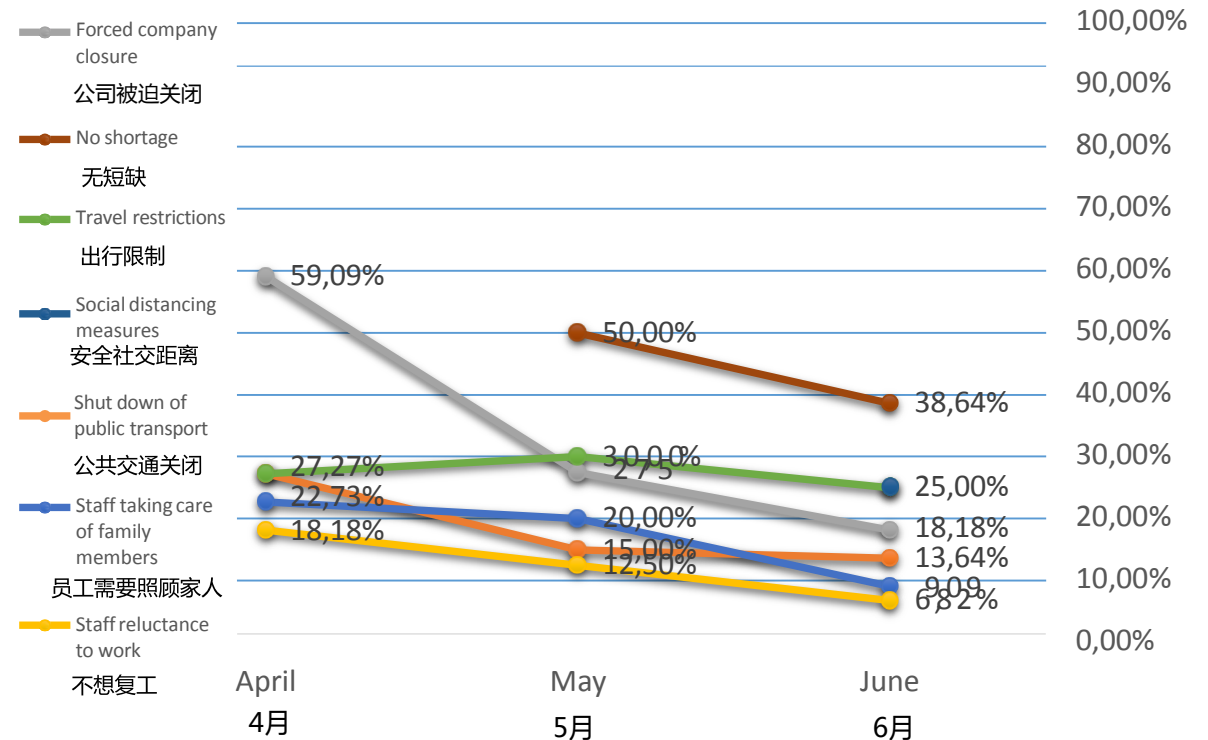
LABOR: DECREASING SHORTAGE OF LABOR

劳工：劳动力短缺问题有所缓解



- Still a little less than 40% see shortage of workers, that's more than 10% less than last month.
- 仍有不到40%的受访者认为没有劳动力短缺，该数字比上个月减少了10%以上。
- The number of respondents challenged by forced company closure is further decreasing.
- 受公司被迫关闭公司影响的受访者人数正在进一步减少。
- Half of last months respondents are confronted with staff being absent due to reluctance to return to work and because they must take care of family members.
- 由于不愿复工，和必须照顾家庭成员受到困扰的受访者较上个月减少了一半。
- Travel restrictions and closed public transport remain an important reason for staff being unable to pursue their tasks.
- 出行限制和公共交通的关闭仍然是工作人员无法复工的重要原因。

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



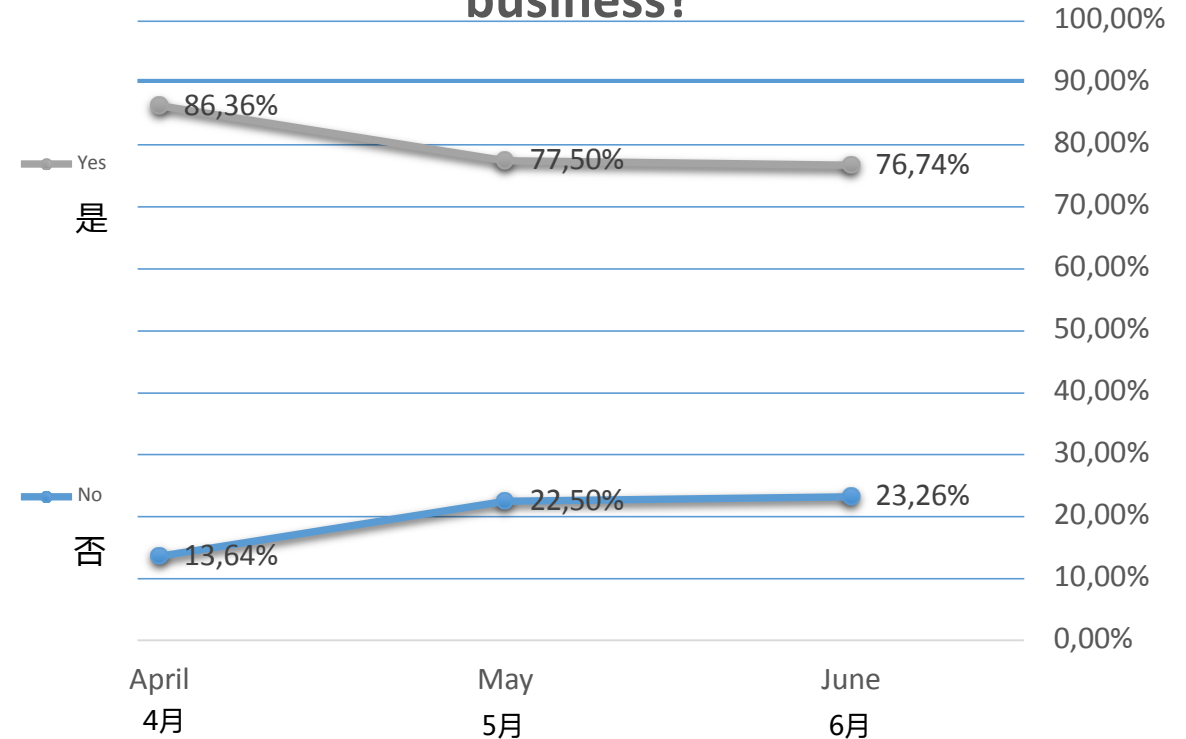
LEGAL: STILL IMPORTANT COVID-19 REGULATORY MEASURES

法规：仍然重要的疫情相关监管要求



- Over 75% are impacted by specifically implemented regulations due to the COVID-19 pandemic. This remains unchanged compared to last month.
- 由于疫情爆发，超过75%的受访者受到具体实施的监管的影响。该数字与上个月持平。

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

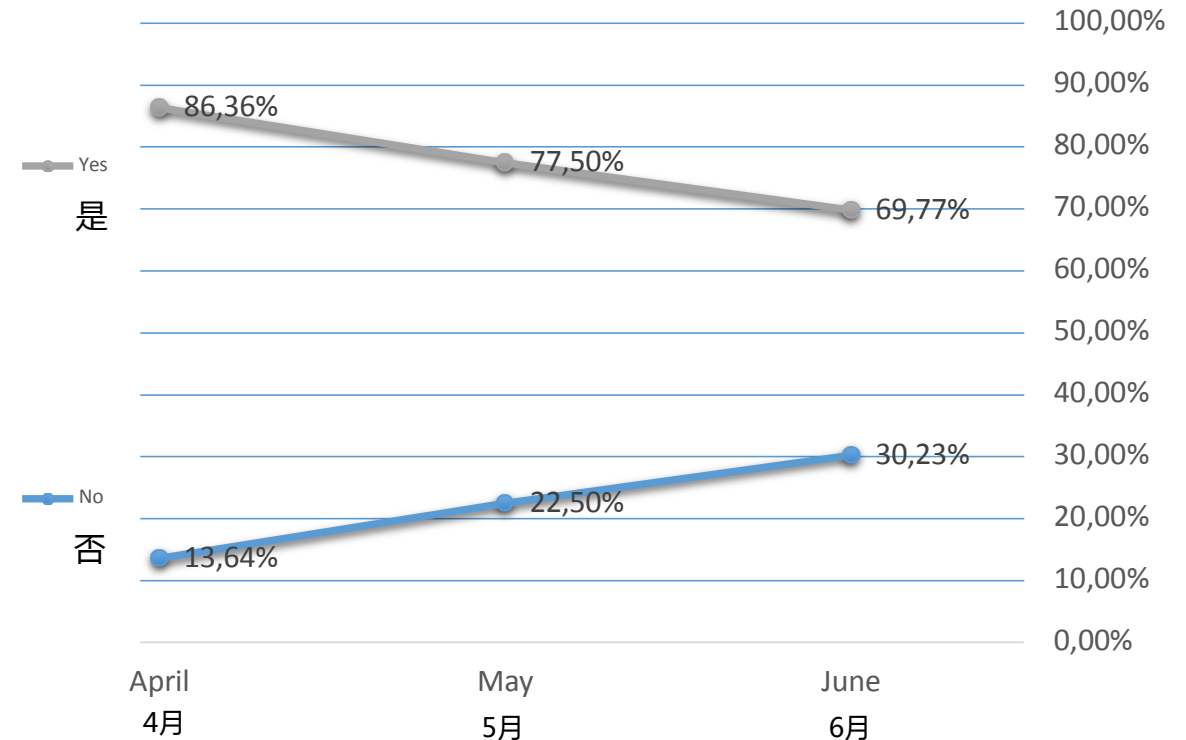
财务：现金流问题略有改善



- Close to 77% are challenged by low cash flow.
- 约77%的人面临着现金流不足的挑战。
- This is roughly 7% less than last month and with that the trend continuous to show that respondents face slightly less cash flow issues.
- 与上月相比，降幅约为7%。这一趋势预示着受访者面临的现金流问题正在逐步改善。

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?



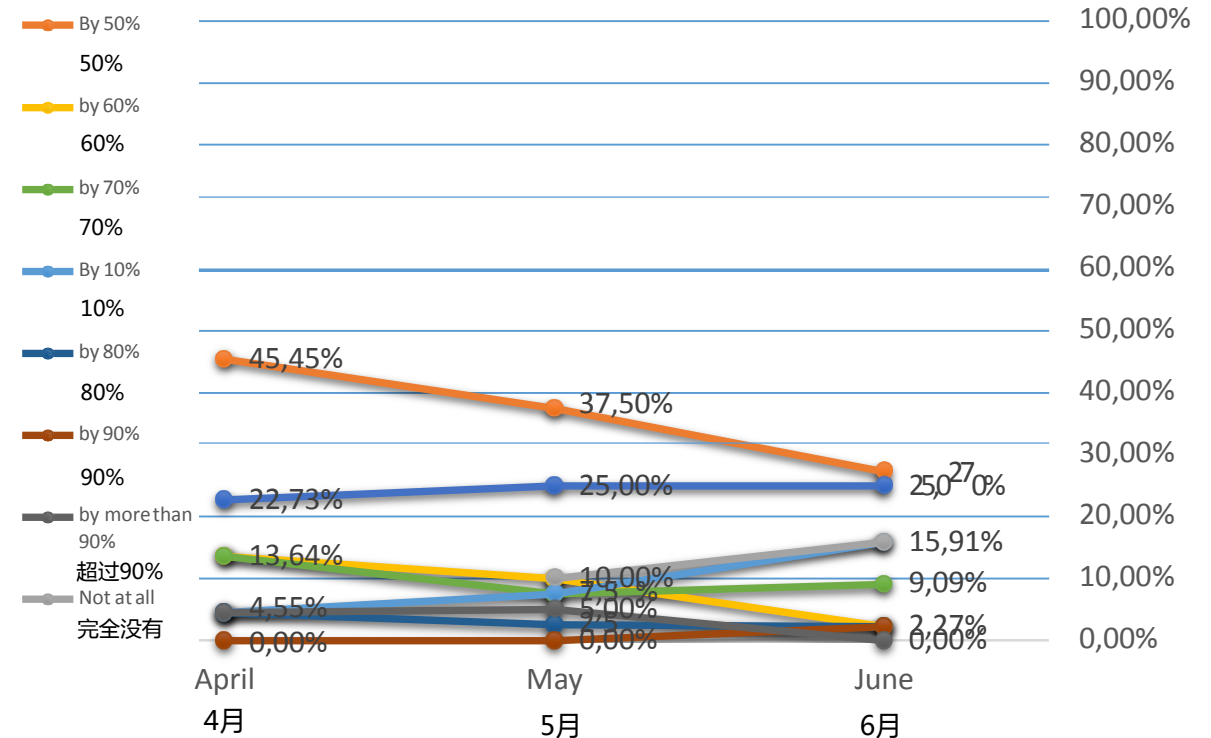
BUSINESS FORECASTING: GLOBAL SLUMP STILL PROJECTED BY MANY

业务预测：仍有许多人预测全球经济衰退

- COVID-19 is forecast to impact 84% of respondent's business. That's a little improvement of 6% compared to last month.
- 84%的受访者预测疫情对他们的业务产生了影响。与上个月相比，该数字降低了6%。
- There is an unchanged trend that, most of respondents (27%) see their business dropping by 50% in the upcoming month. Next, 25% of respondents expect a 20% drop and 15% expect their business to drop 10%.
- 与之前预测的趋势相似，大多数受访者（27%）认为他们的业务在未来一个月将下降50%。其次，25%的受访者预计降幅达20%，15%的受访者预测他们的业务将下降10%。
- Compared to the last months, nobody expects a business drop of more than 90% but a little more than 2% expect still their business to drop by 90% whereas nobody expected that in the last months.
- 与过去几个月相比，没有人预测业务下降将超过90%；但仍有略高于2%的人预计他们的业务将下降90%，该数据在过去的几个月里为0。
- The most affected regions remain Europe and Northern America where a little over 60% expect less business which is a drop of around 10% compared to last month.
- 受影响最严重的地区仍然是欧洲和北美，略高于60%的受访者预期业务量会减少，与上个月相比该数字下降了10%左右。

您认为业务会在下月下降么？

Do you see your business dropping in the upcoming month:



BUSINESS FORECAST: FULL RECOVERY SEEMS LESS LIKELY

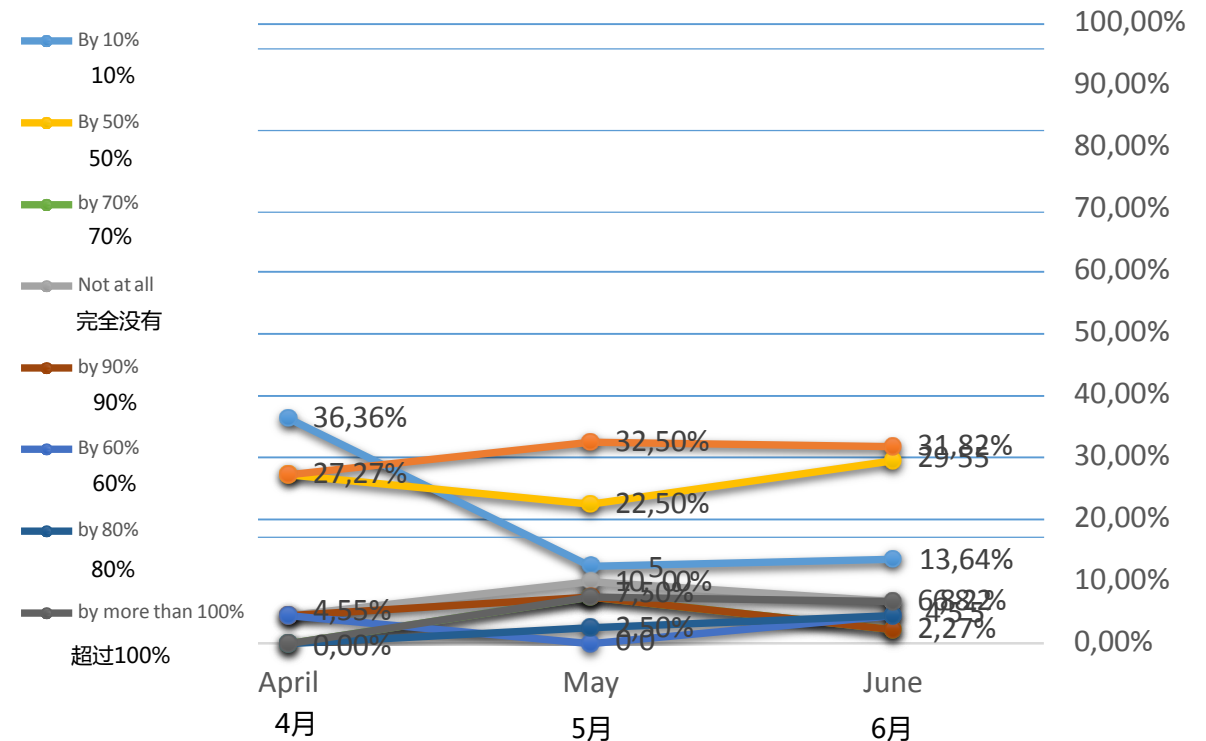
业务预测：全面复苏的可能性似乎不大



- 7% do not expect any recovery. That's slightly more optimistic than last month when still 10% shared that opinion.
- 7%的受访者预测，经济不会复苏。该数字在上个月为10%，说明业内对未来持相对乐观态度。
- The percentage of respondents expecting their business to recover by 10 to 50% remains roughly the same as last month.
- 预测业务将恢复10%~50%的受访者比例与上个月基本持平。
- However, there are only half as many respondents expecting a recovery between 70 and 90%.
- 然而，预期经济恢复在70%至90%之间的受访者比例较上月减少了一半。
- Over 45% of respondents see a recovery within 91 to 180 days, while 30% think it will take more than a year.
- 超过45%的受访者认为恢复期需要91~180天，而30%的受访者认为至少需要一年缓冲。

您认为疫情结束后，经济会复苏么？

Do you foresee the business rebound after the pandemic?



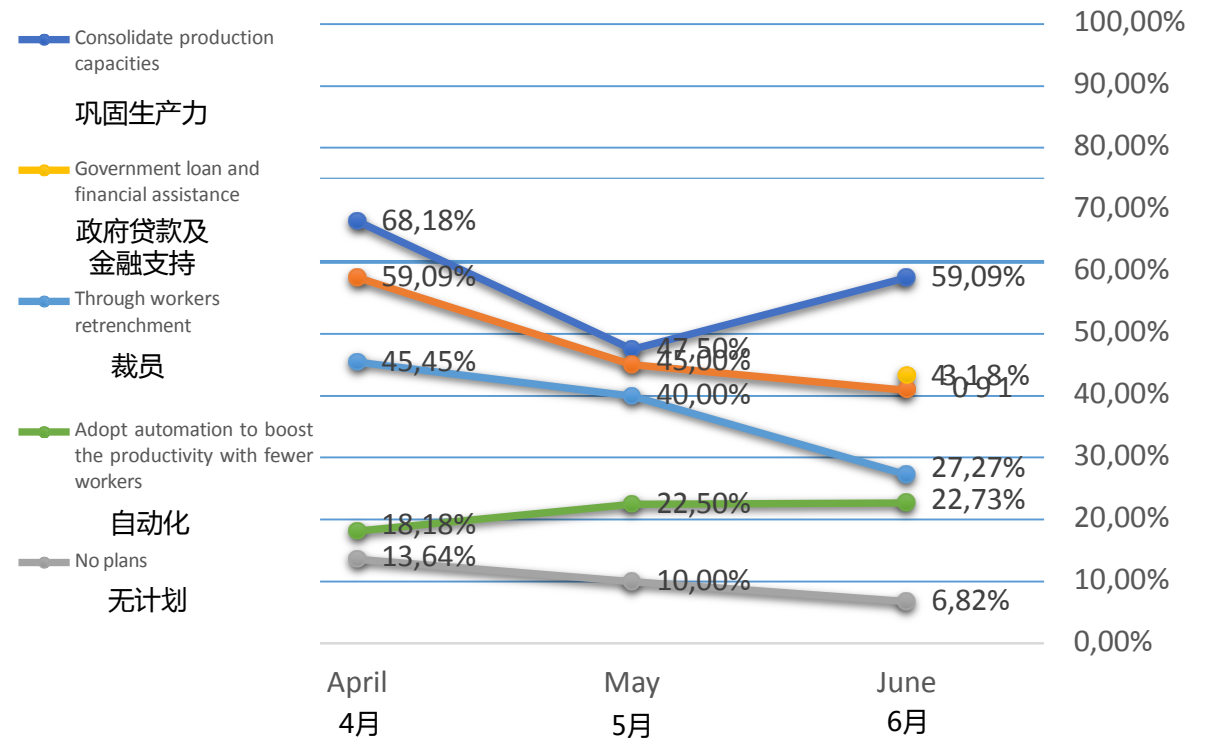
MEASURES TAKEN: FOCUS ON CONSOLIDATING PRODUCTION CAPACITIES

所采取的措施：着力巩固生产力

- Close to 50% rely on government loans and financial assistance.
- 近50%的受访者依赖政府贷款及财政支持。
- The number of respondents having no plans is still decreasing and accounts for 7% compared to 10% in May and 14% in April.
- 没有应对方案的受访者人数仍在减少，占比7%，该数据在5月为10%，4月为14%。
- The same goes for the retrenching workers, where a downtrend is pointing towards 27% (40% in May and 46% in April) and also adopting lean production is for 4% less an option.
- 考虑裁员的受访者比例也呈下降趋势，占比27%，该数据在5月为40%，4月为46%。采取精益生产的受访者比例较上个月减少了4%。
- The option gaining most consent is to consolidate production capacities, close to 60% opt for this solution.
- 获得最多认可的方案是巩固生产力，有接近60%的受访者选择此方案。

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: BACK TO THE APRIL STRATEGIES

- ONLINE SALE INCREASE AND MINIMUM

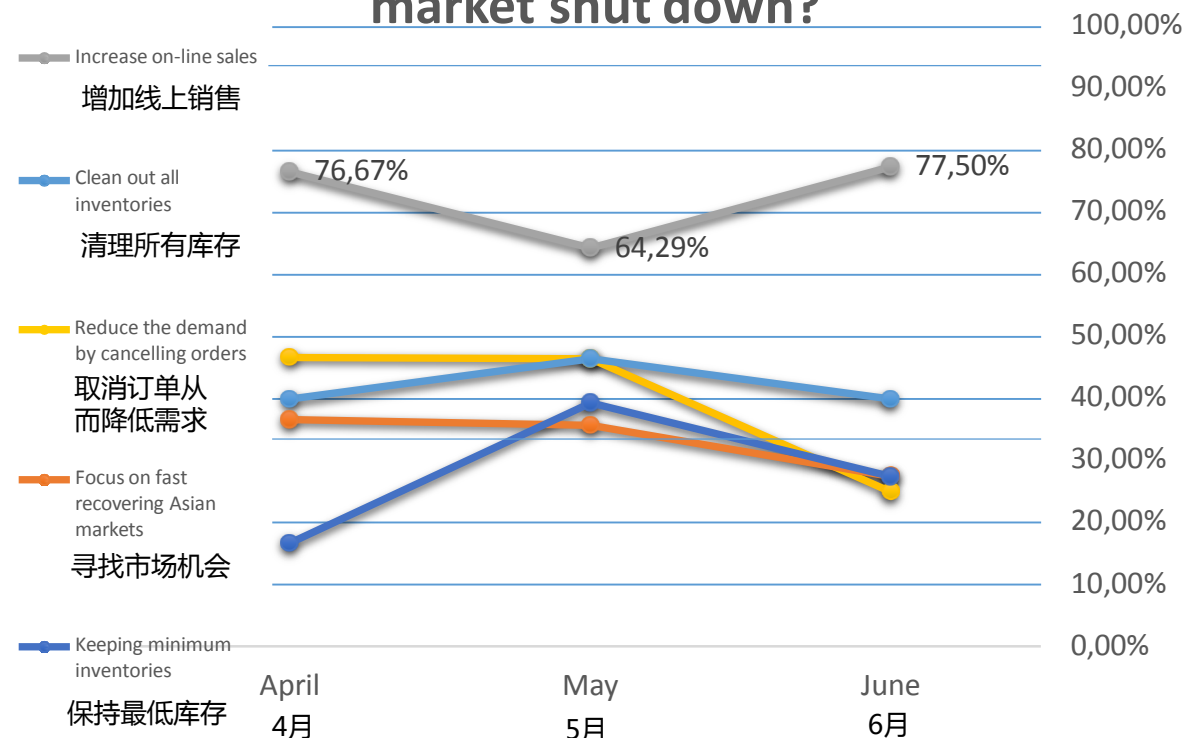
减轻影响：回归4月策略 – 增加线上销售、保持最低库存



- Focusing on the recovering Asian market and cancelling orders are again less of an option compared to last months.
- 与上个月相比，专注于复苏的亚洲市场和取消订单再次成为不太可能的选择。
- For all other strategies the trend changes and response rates are again going into the same direction as in April and not pursuing the direction of May.
- 其他策略的趋势变化和响应率与4月结果的走势相同，而不是按照5月的趋势方向发展。
- Increasing online sales (77%) and clean out existing inventories (40%) remain the most chosen strategies.
- 增加线上销售（77%）及清理现有库存（40%）仍然是最受欢迎的选择。

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: CONSOLIDATION OF SUPPLY CHAIN

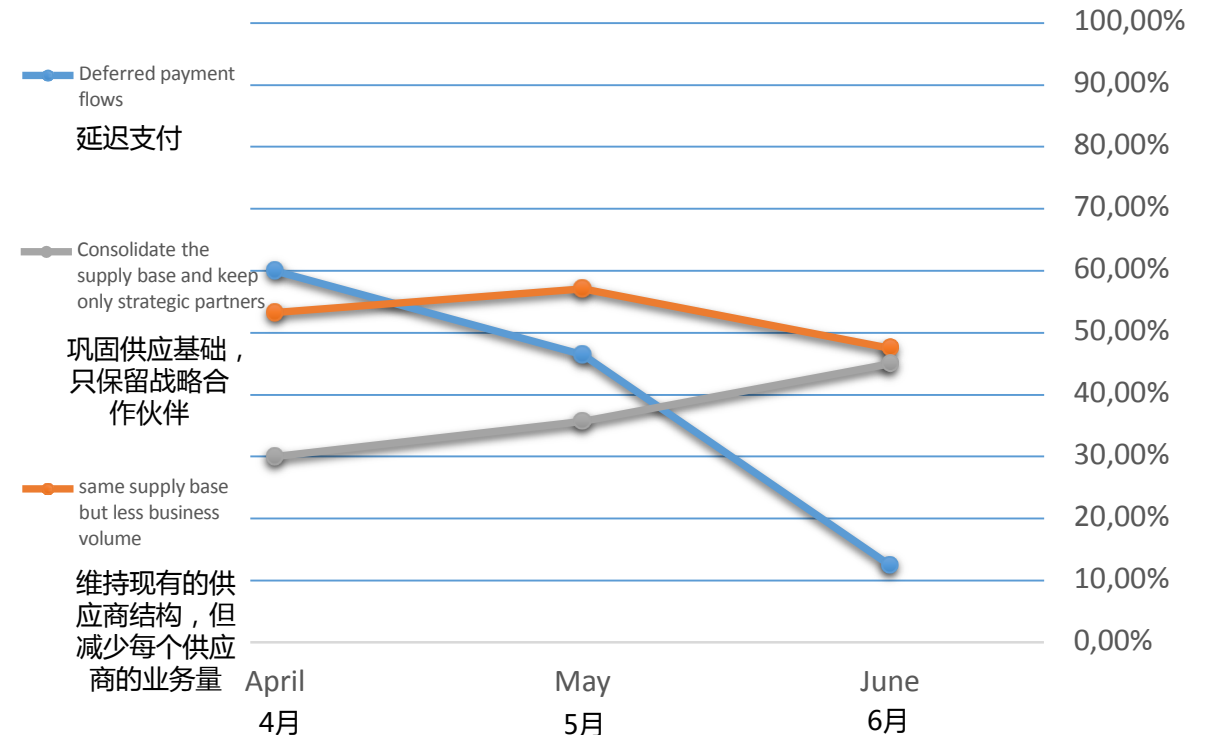
后果：供应链整合



- Whereas in April 60% opted to defer payment and still 47% did so in May, there are only a little over 12% opting for that strategy in June.
- 选择延期付款的受访者比例在4月约为60%，在5月为47%，而在6月仅略高于12%。
- In return, consolidating the supply chain has gained in importance as 15% more respondents since April look into that solution.
- 整合供应链变得越来越重要，自4月以来，又多了15%的受访者在寻求此种解决方案。

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: CASH POSITION AND STAFF'S HEALTH

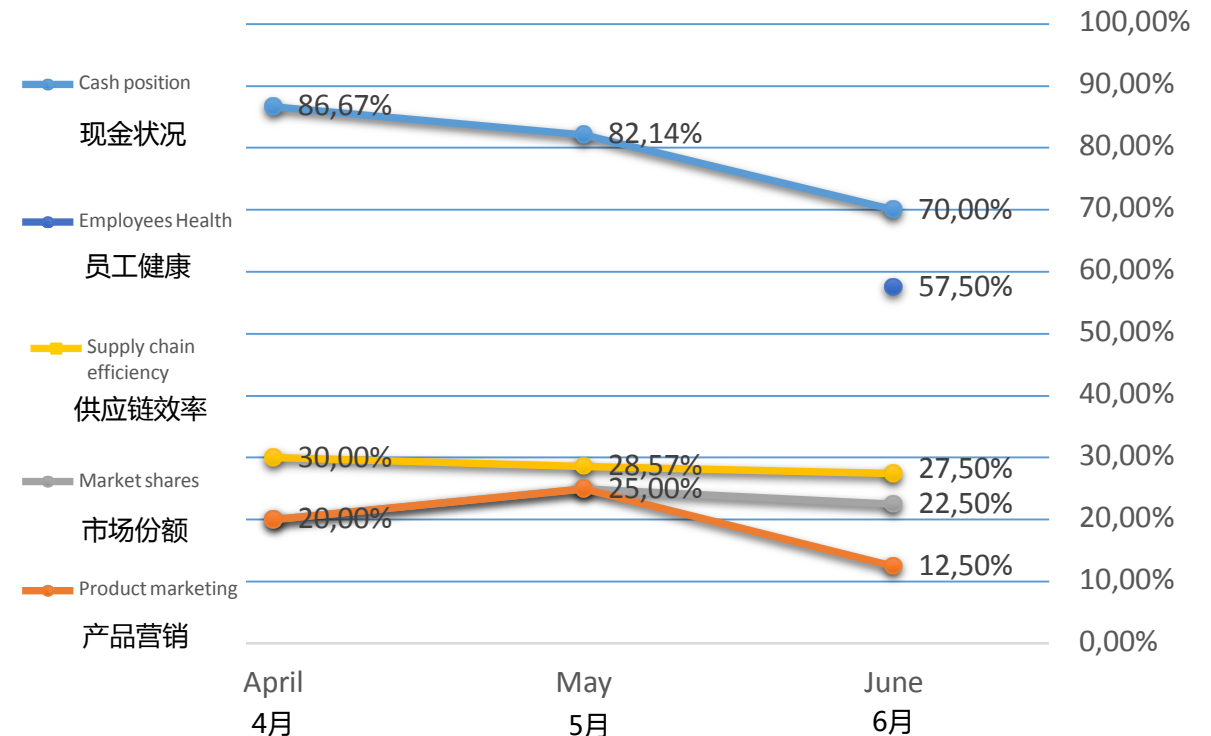
侧重点：现金状况及员工健康



- The order of priorities remains unchanged compared to the last months.
- 与过去几个月相比，优先次序保持不变。
- Focusing on cash position and product marketing is for around 12% of respondents less important than in May.
- 关注现金状况和产品营销的受访者较5月减少了约12%。
- As of June a high percentage of nearly 60% of respondents have explained that employees' health has become a priority.
- 6月的结果显示，近60%的受访者将侧重点转移到了关注员工健康。

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 IS KEY

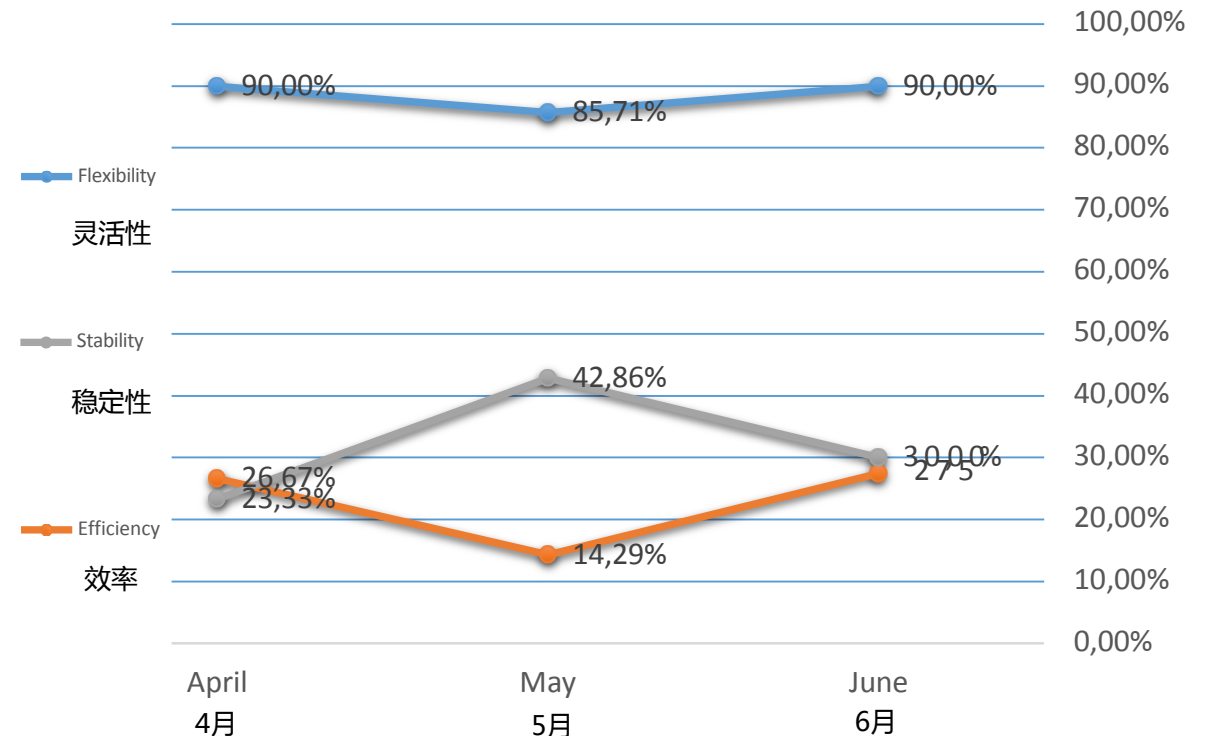
对供应商的期望：灵活性很重要



- Respondents have selected nearly the same order of expectations towards suppliers as they did in April.
- 受访消费者对供应商的期望顺序与4月几乎相同。
- Flexibility remains key while Efficiency and Stability are roughly of same importance.
- 灵活性仍然是关键，而效率和稳定性的
重要程度相近。

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?

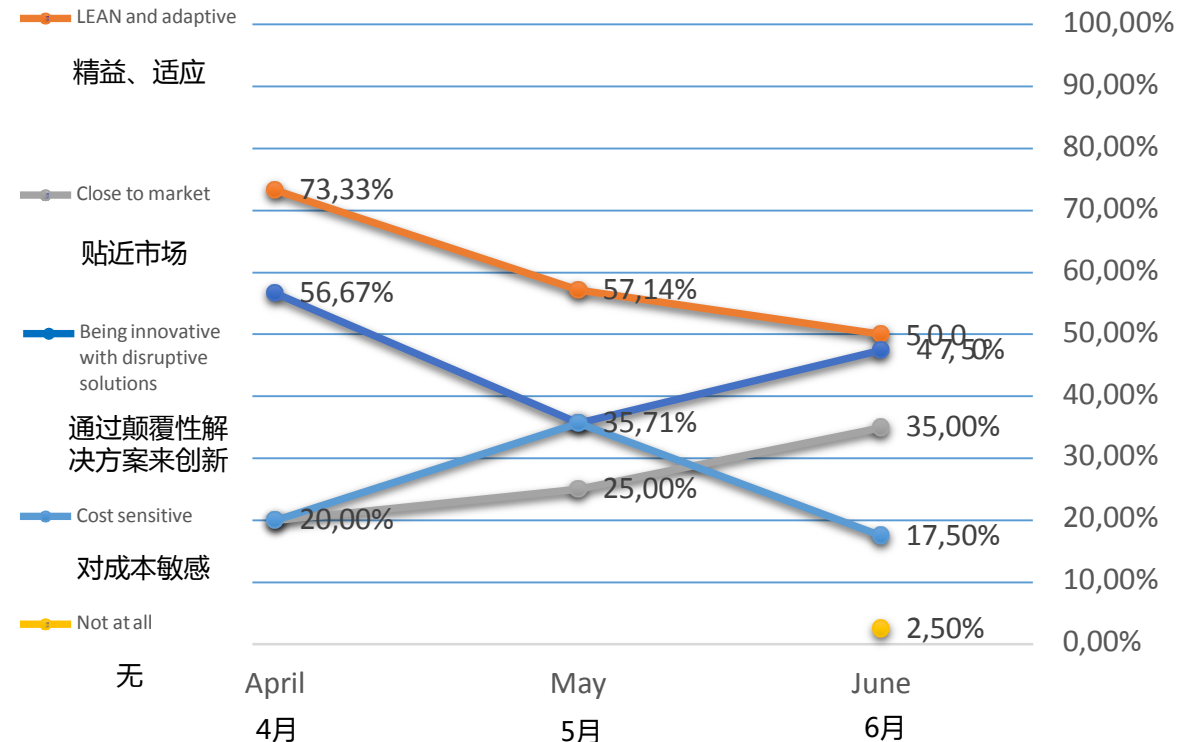


INCREASINGLY IMPORTANT

供应链转型：创新和贴近市场日益重要

- Lean and adaptive supply chain transformation is further losing attractiveness amongst respondents with only half of them opting for this change.
- 精益和适应性供应链转型的选择程度降低了，仅有50%的受访者选择了这种变革。
- Innovation and disruptive solutions is again more important to the industry.
- 创新和颠覆性解决方案对行业来说再次显得更为重要。
- Moving closer to the market is increasingly important as again 10% more respondents have opted for this move.
- 向市场靠拢越来越重要，受访者比例较上月增加了10%。
- Being cost sensitive is as unattractive as never since the survey start.
- 对成本敏感的选择比例创历史新低。

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: NEED FOR CHANGE SUCH AS REGIONAL SOURCING

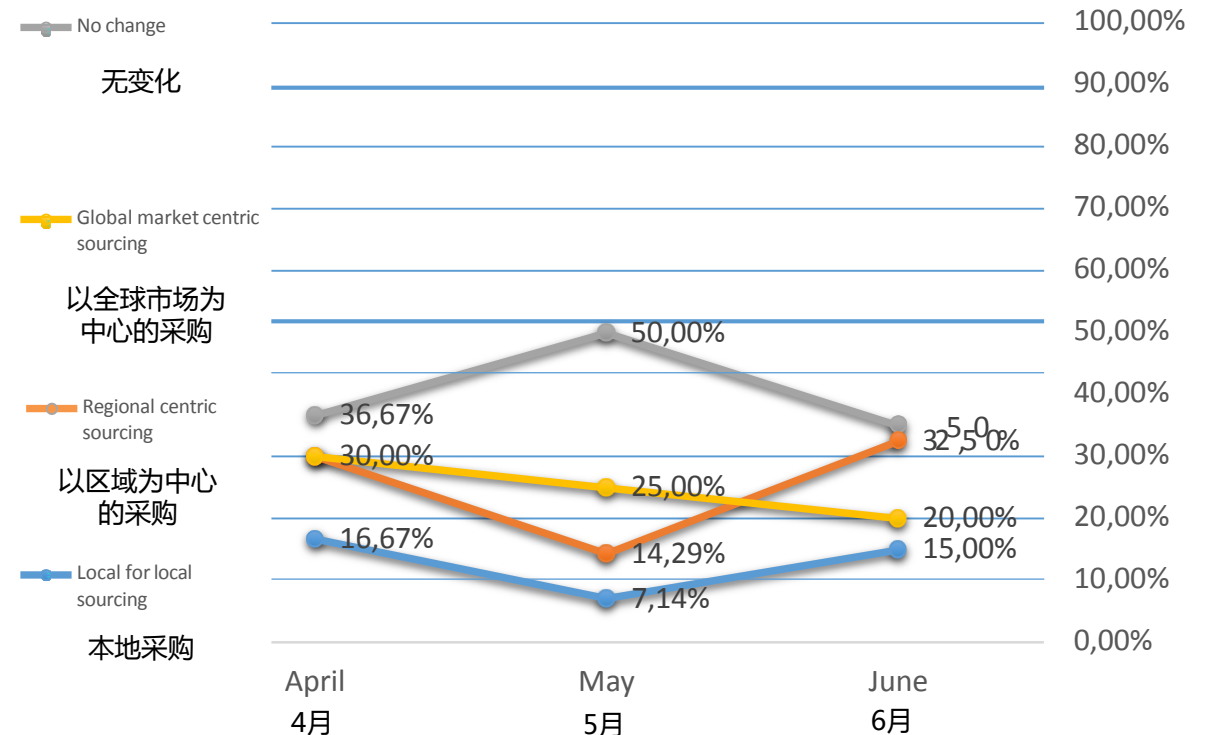
采购优先顺序：区域采购等变革需求



- Only 35% of respondents don't intend to change their sourcing priorities, that's a significant drop of 15% compared to last month and is the same result as in April.
- 只有35%的受访者不打算改变他们的采购优先顺序，该数字与4月份持平，较5月大幅下降了15%。
- The trend goes on that global market centric sourcing is getting less attractive with only 20% of respondents choosing that option.
- 以全球市场为中心的采购越来越没有吸引力，仅20%的受访者做出了这种选择。
- Local for local and also regional centric sourcing is becoming a more likely option for respondents.
- 对于受访者来说，本地采购及以区域为中心的采购将成为更可能的选择。

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: DOWNWARD TREND FOR PRICE SENSITIVITY

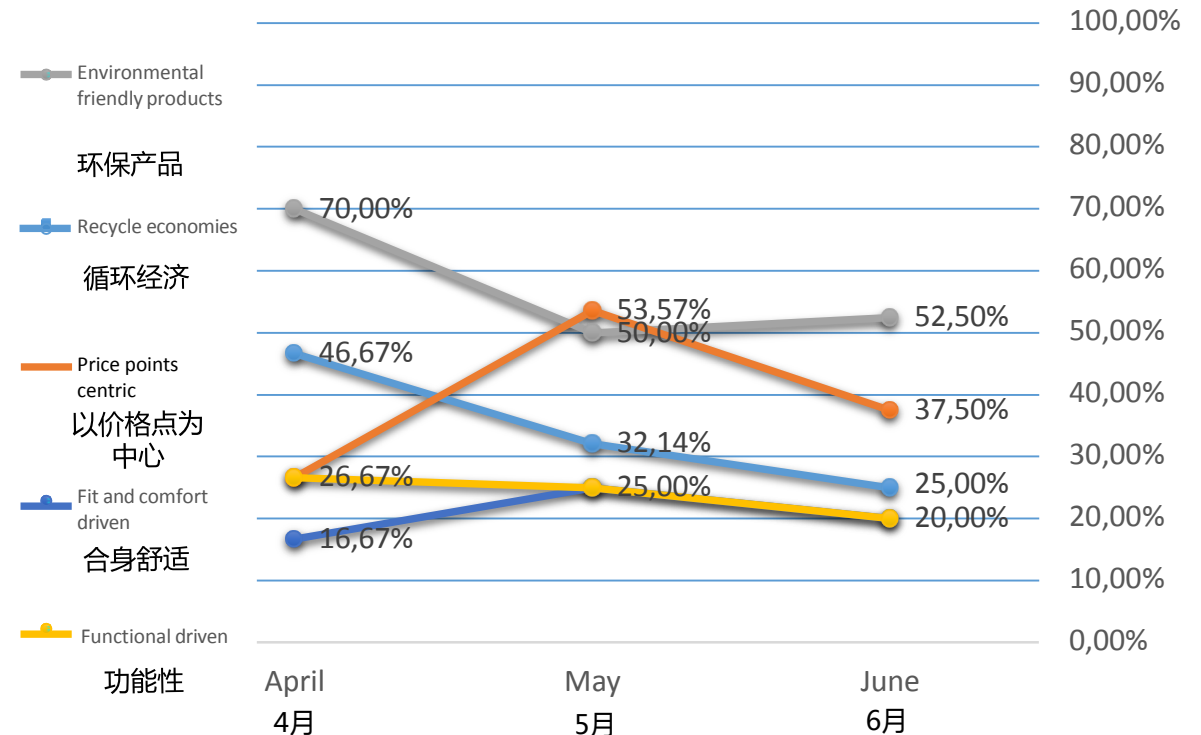
市场趋势：对价格敏感呈下降趋势



- Price points centric trends seem to be less likely for the industry according to 16% less respondents.
- 以价格点为中心的趋势似乎不太可能出现，该比例较上月减少了16%。
- Environmental friendly solutions are slightly increasing as a future trend.
- 环境友好型解决方案作为一种未来趋势，略有增加。

疫情结束后，新兴市场的趋势是？

What would be the emerging market trends after the pandemic?



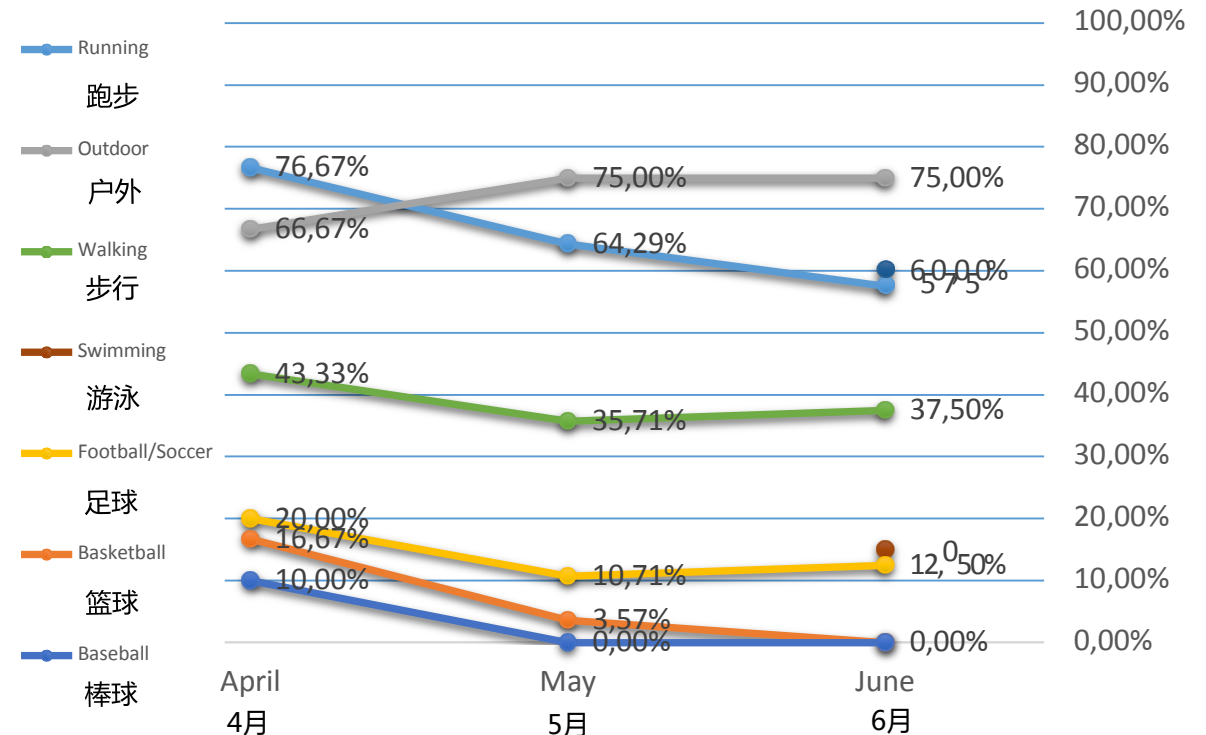
PREVAILING SPORTS AFTER THE PANDEMIC: OUTDOOR & CYCLING AHEAD OF THE REST

疫情后的流行运动：户外及骑行最受青睐



- Outdoor remains the most prevalent sport according to the industry.
- 户外运动仍被认为是疫后最受欢迎的运动。
- This is closely followed by cycling and running.
- 紧随其后的是骑行运动及跑步。
- It's worthwhile that Basketball and Baseball have not been selected by any of the respondents.
- 值得一提的是，篮球及棒球未被任何受访者选择。

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 JULY 2020 下次调研 – 2020年7月



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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

KEEP SAFE & HEALTHY 保重

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