

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

November 2020 2020年11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



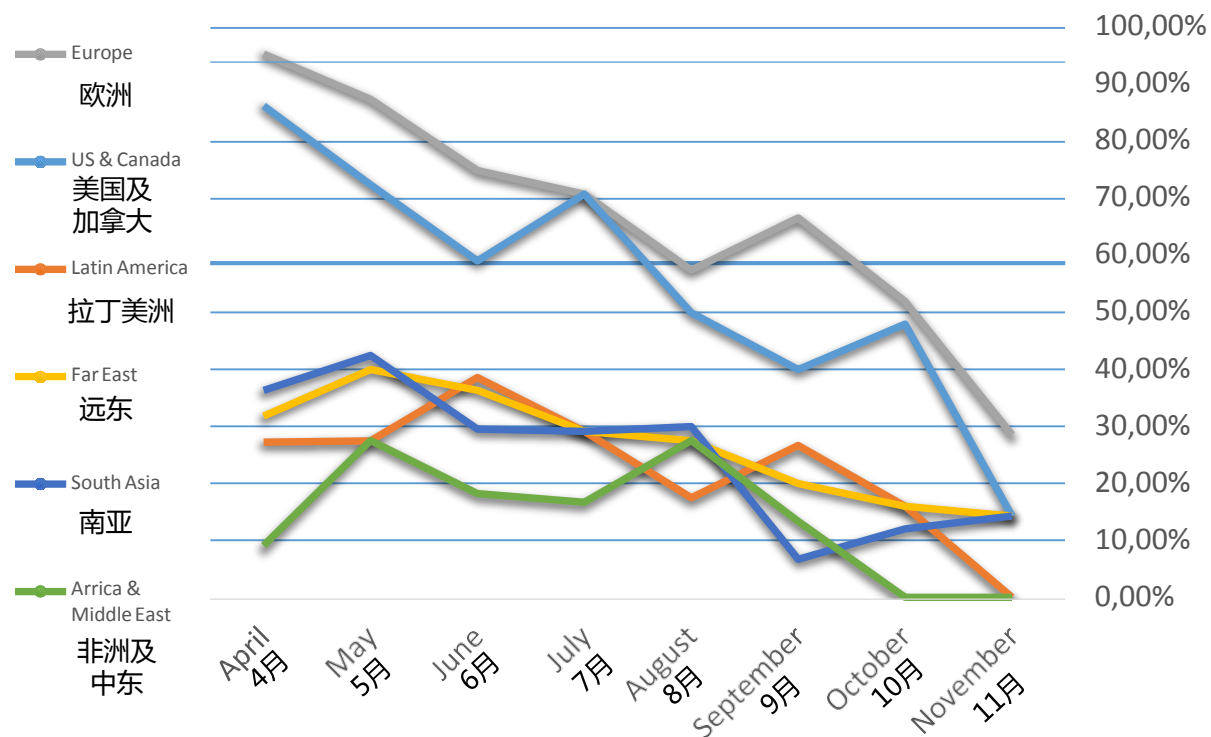
DEMAND: orders globally no longer steeply decrease

需求：全球订单不再急剧下降



- For 71% of respondents, orders did not decrease, that's 43% more than last month.
- 71%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43%。
- The situation has improved for most regions.
- 大部分地区的情况有所好转。
- The sharpest drop has been recorded for Europe from where close to 28% less face order decrease and US & Canada with 14%.
- 反馈欧洲订单减少的人数下降了近28%，创下了最大的降幅，反馈美国和加拿大订单减少的人数下降了14%。

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



LOGISTICS: material shortage mainly due to production bottlenecks

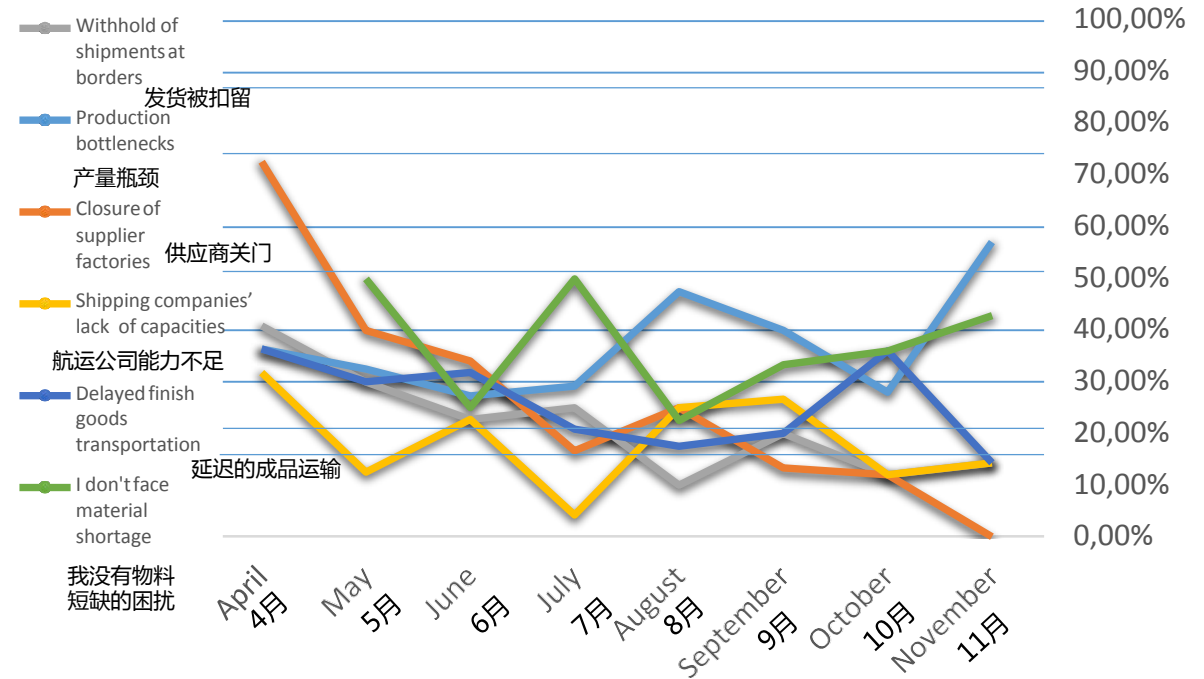
物流：物料短缺主要是由产量瓶颈造成的



- 42% of respondents don't face material shortage that's a slight improvement compared to last month.
- 42%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。
- The main reason for material shortage for this months' survey is the production bottlenecks.
- 本月调查结果显示，造成物料短缺的主要原因是产量瓶颈。
- No one of the respondents mentioned the closure of the supplier factories as an issue.
- 供应商关门不再是个问题，没有受访者做出这一选择。

物料短缺的原因是

Are you facing material shortage due to:



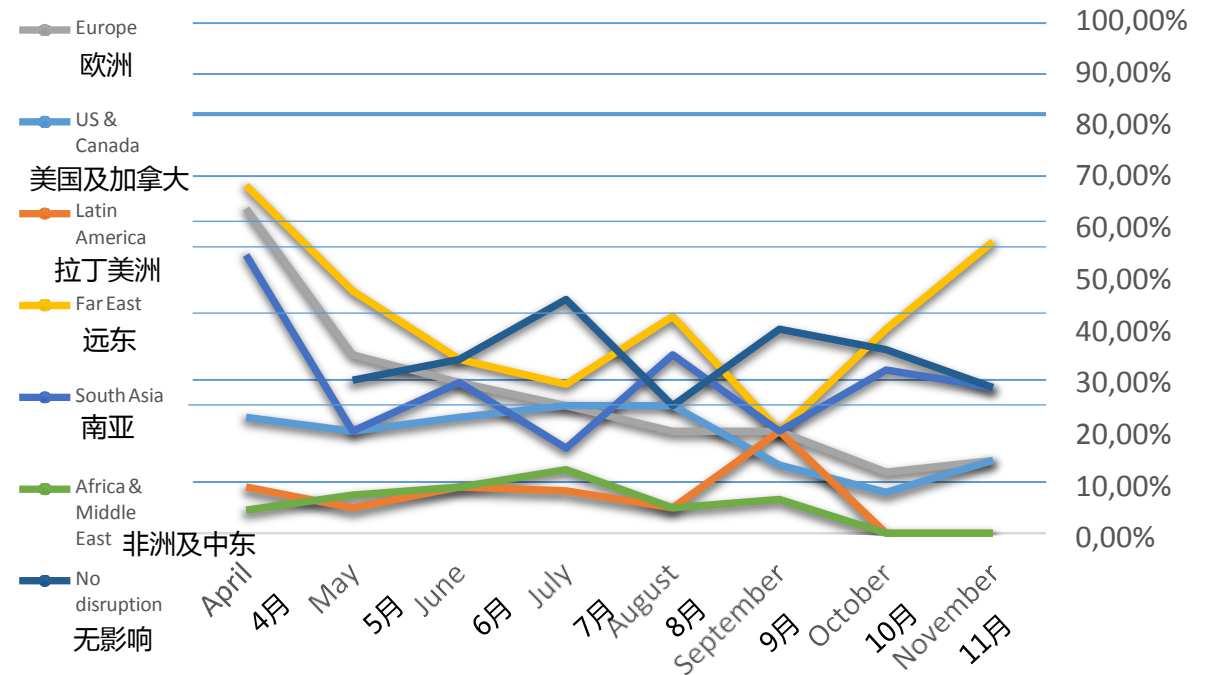
SUPPLY: Important disruption still affect the Far East

供应：远东地区仍面临严重中断



- 28% of industry players did not face supply chain disruption.
- 28%的行业参与者不再面临供应链中断。
- The number of respondents facing disruption in Far East remains important.
- 远东地区的供应受干扰情况仍然严峻。
- Supply chain disruption from Europe, US & Canada increased slightly compared to last month.
- 欧洲、美国和加拿大供应中断的情况较上个月有所恶化。
- Only in South Asia the supply disruption has decreased this month.
- 南亚是本月唯一情况好转的地区。

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



LABOR: More than half is no longer facing shortage

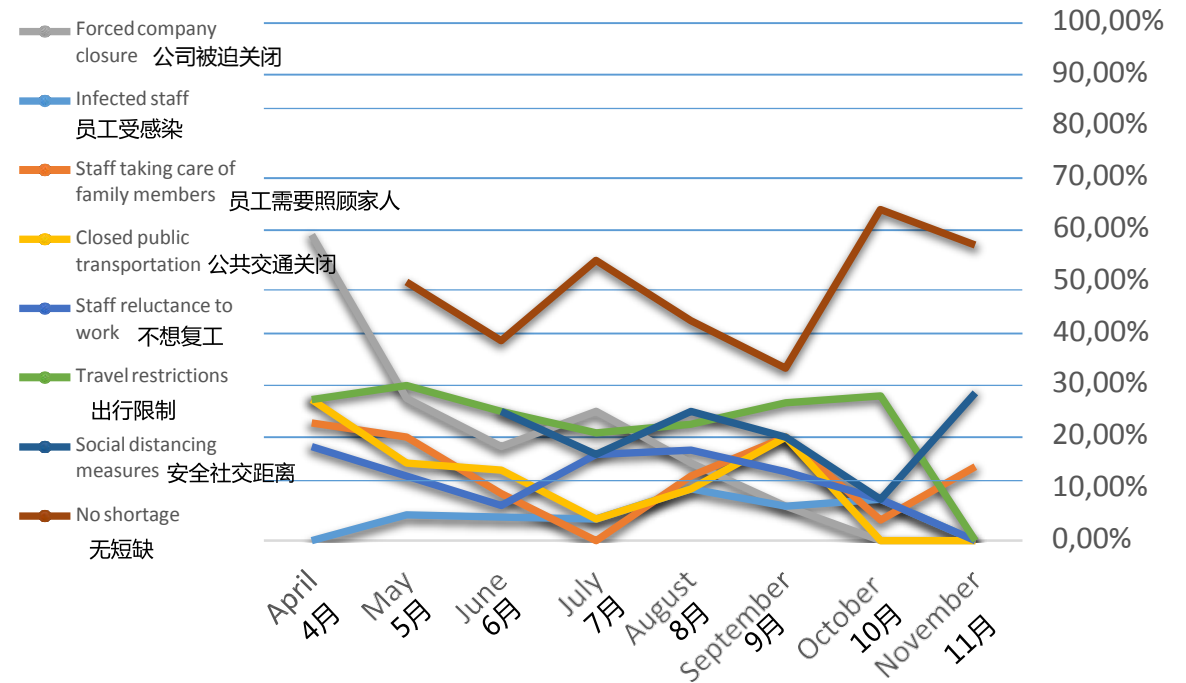
劳工：超过一半的人不再面临劳动力短缺



- 57% are no longer confronted with labor shortage.
- 57%的人不再面临劳动力短缺的问题。
- Travel restriction dropped down to 0% together with infected staff.
- 出行限制及受感染员工的选择率下降至0。
- The main reason of labors' shortage this month is Social distancing measures with 28% followed by staffing taking care of family members which seems to be increasing again.
- 本月劳动力短缺的主要原因是社交距离，有28%的人做出了这一选择。员工需要照顾家庭成员这一选项似乎又有上升趋势。

劳工短缺的原因是

Are you confronted with shortage of labors due to:



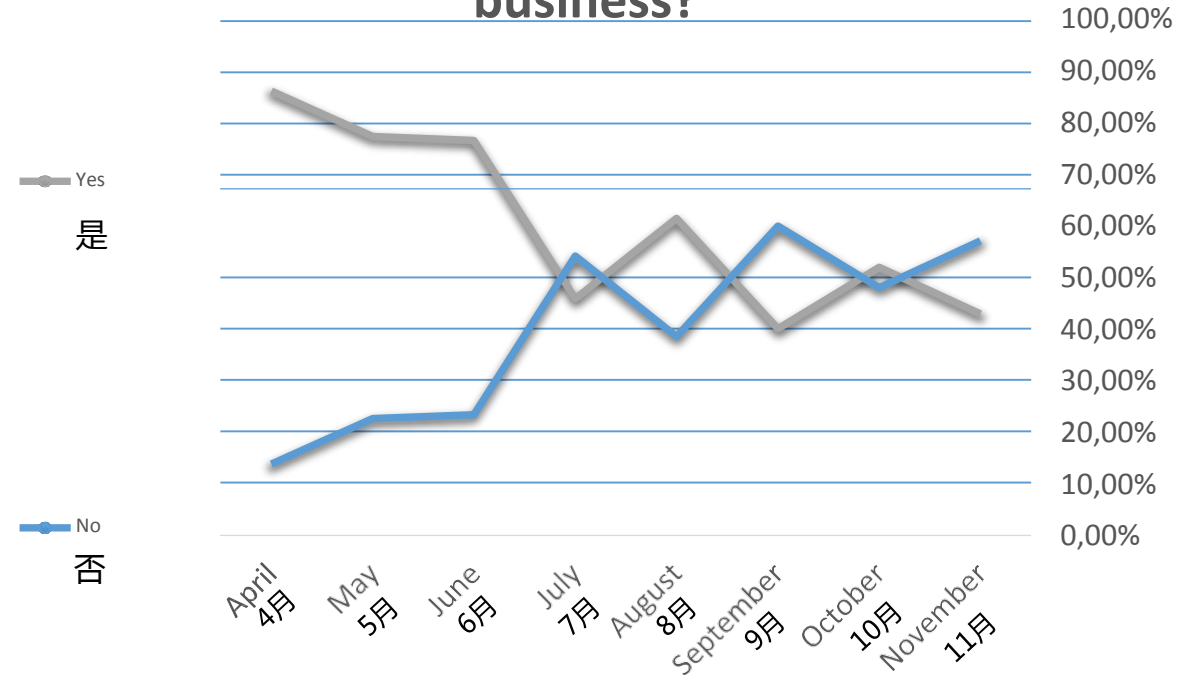
LEGAL: alternating trend ongoing since summer

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 about 14% more respondents consider themselves not 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。本月认为自己没有受到监管措施影响的受访者比例比选择有的人多14%。

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 is no longer an issue for this month

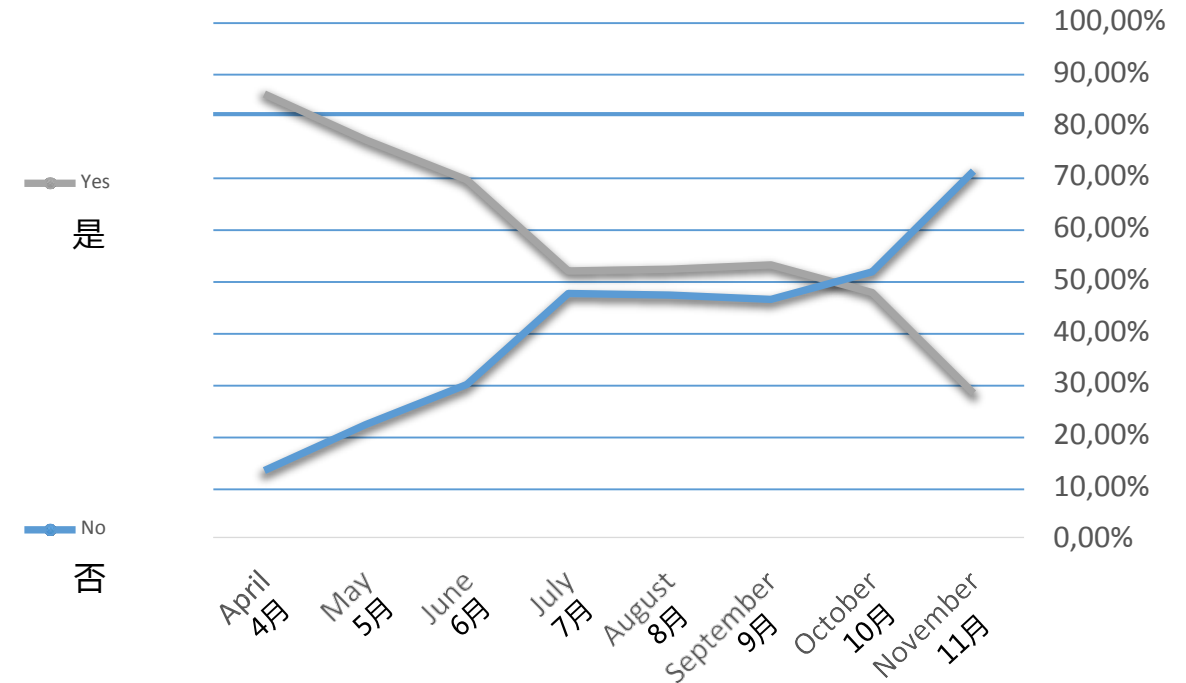
财务：本月，现金流不再是个问题



- This month the trend shows that low cash flow is not longer an issue for over 71% of the respondent.
- 本月的趋势显示，超过71%的受访者不再认为低现金流是个问题。
- 28% are still facing this issue, however this is the lower percentage registered since April.
- 28%的受访者仍面临这一问题，但这是自今年4月以来记录的较低数据。

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 for over 71%

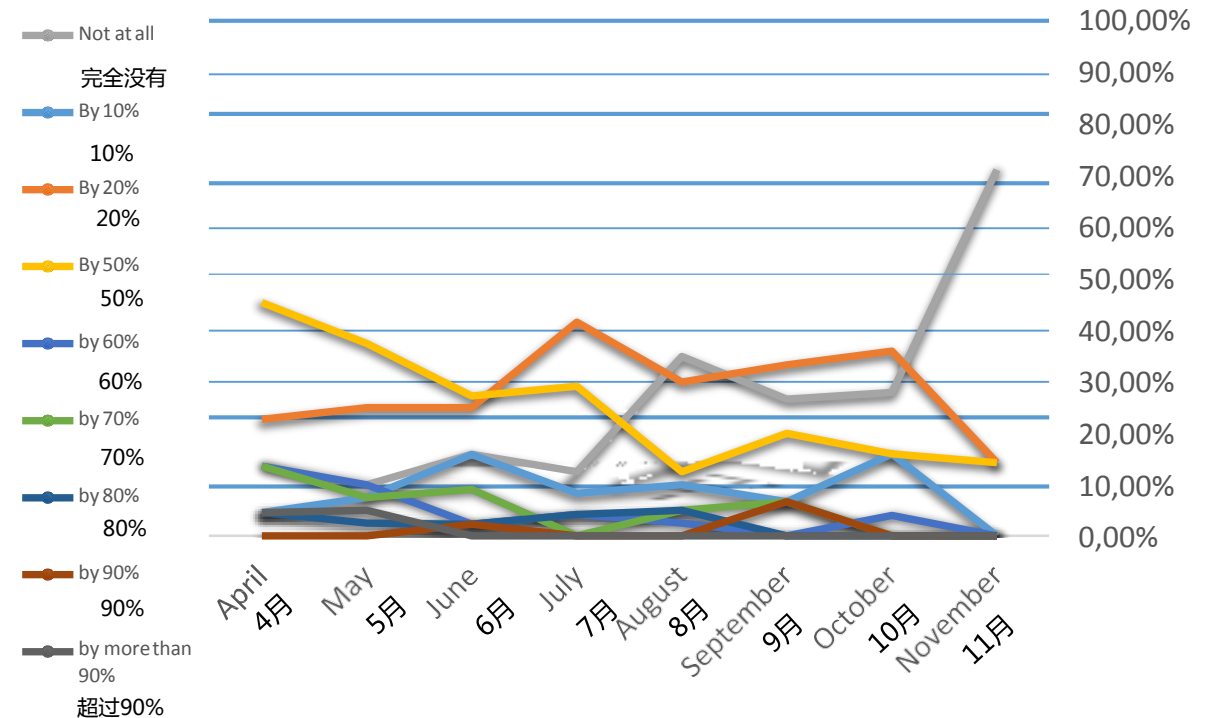
业务预测：71%的受访者不再预测业务下滑



- Over 71% declared that they will not see a drop of their business. This is the highest percentage we have registered since April.
- 超过71%的受访者认为业务将不再下滑。这是自4月以来记录的最高数据。
- Compared to last month, the number of respondents predicting that their sales will drop is significantly reduced at around 28% (half selected by 20% and half by 50%).
- 与上个月相比，预计业务会下降的受访者数量明显减少，约为28%（其中一半认为下降幅度为20%，另一半认为下降幅度为50%）。
- The most affected region remains Europe however the percentage dropped to 28%. US & Canada, Far East and South Asia are forecasting the drop of 14%.
- 受影响最严重的地区仍然是欧洲，但该比例下降至28%。美国、加拿大、远东和南亚预测业务下降的受访者占比为14%。

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

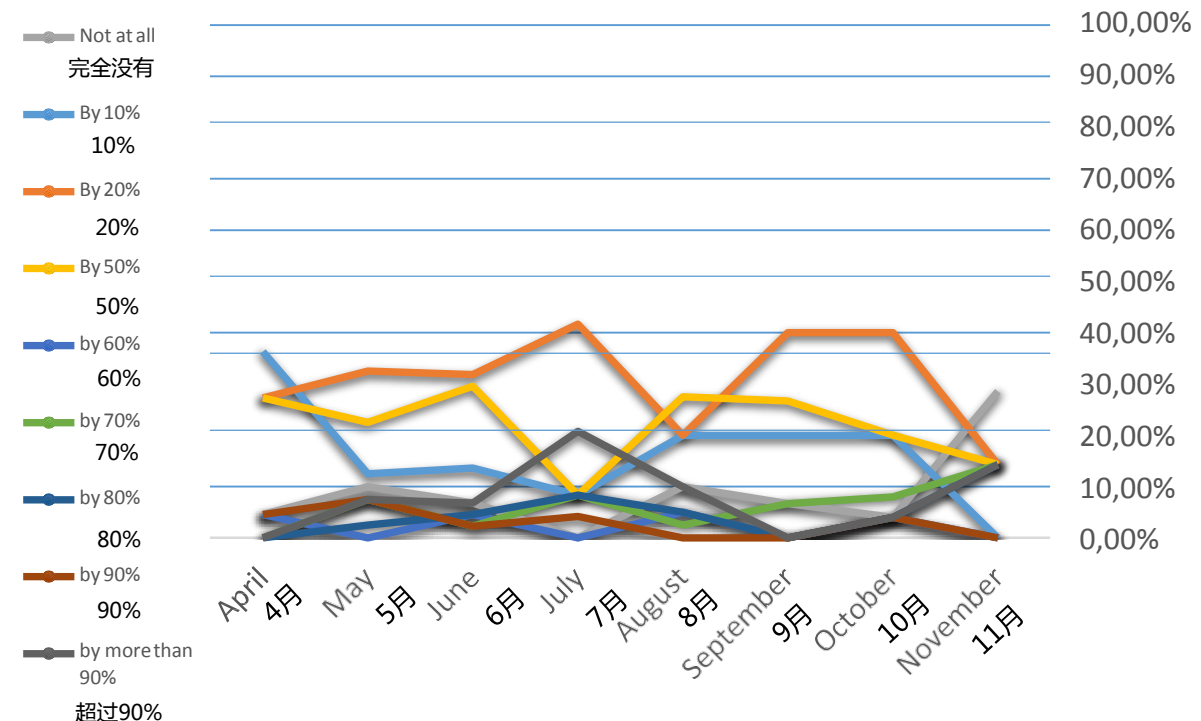
商业预测：对复苏的信心减弱



- 27% of respondents don't expect any rebound of their business at all this month. This is a clear sign of less confidence in recovery and the highest percentage reached since April.
- 本月，有27%的受访者认为他们的业务根本不会恢复。这是对经济复苏的信心减弱的明显迹象，且为4月以来记录的最高数据。
- The rest of the participants are evenly split in predicting a recovery of the 20, 50, 70, 80 and 100%.
- 预测恢复比例为20%、50%、70%、80%和100%的受访者比例相当。
- With regard to the time frame necessary for the recovery, 28% think that they will need over 1 one year to recover, however a majority of 42% think that their business will need between 91-180 days.
- 关于复苏所需的时间范围，28%的人认为他们的业务需要一年以上的恢复期，然而有42%的人认为恢复期约为91-180天。

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: No workers retrenchment to sustain operations

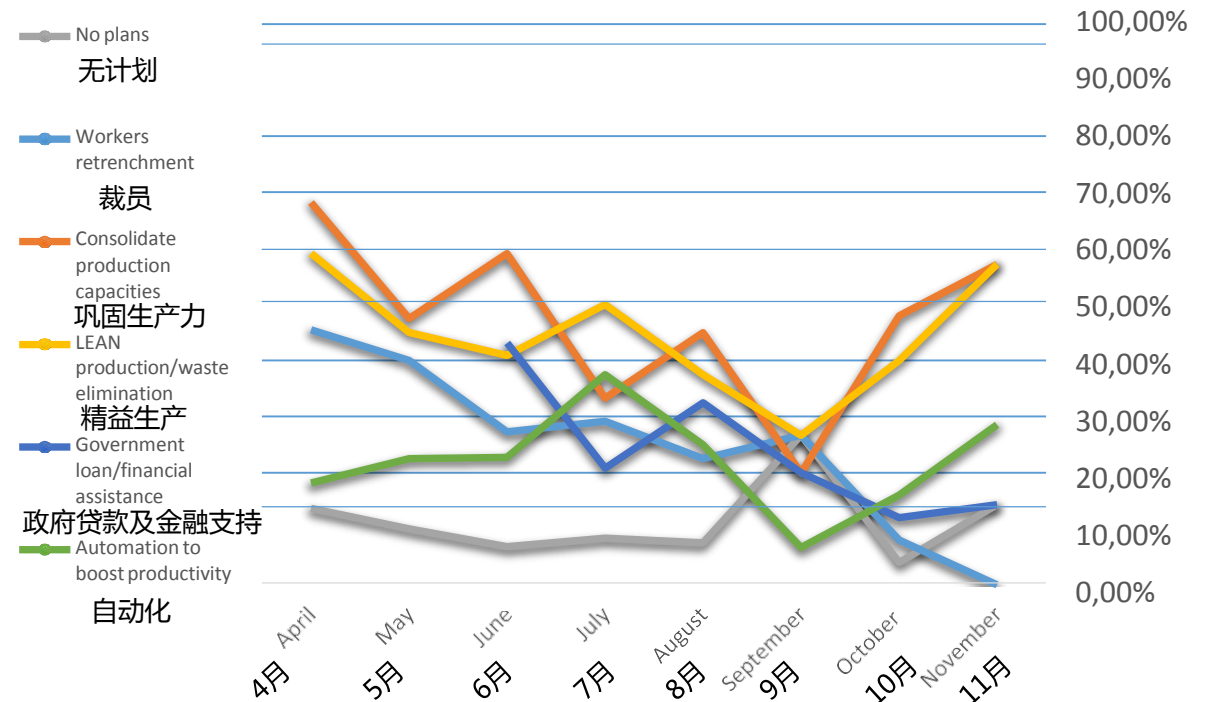
所采取的措施：不通过裁员来维持运营



- The percentage of the people who has not plan at the moment increased to 14% from last month 4%.
- 有14%的受访者没有维持运营的计划，该数据较上个月的4%有所上升。
- There is a sharp increase of companies that think consolidating production capacity and lean production/waste elimination are the main ideas to sustain operations this month with 57% followed by automation to boost productivity with 25% and government loan assistance with 14%.
- 巩固生产力、精益生产/杜绝浪费是最受欢迎的两个措施，选择率为57%，其次是通过自动化提高产能（25%）、政府贷款支持（14%）。
- No one is planning workers retrenchment for this month.
- 这个月，没有受访者选择裁员。

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

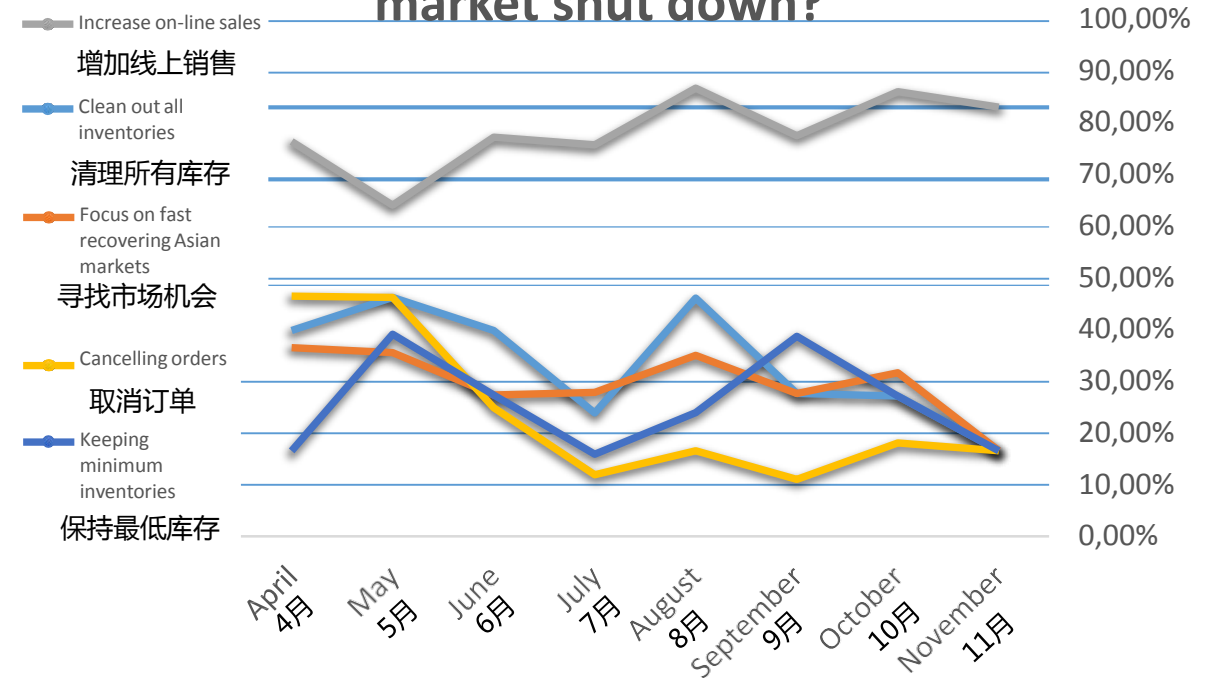
减轻影响：“增加线上销售”这一选项占比一直很高



- Increasing online sales stays on top of the options chosen with over 83% of respondents.
- 超过83%的受访者将增加网上销售作为首选。
- All other strategies are this month chosen equally by 16% each. For the focus on fast recovering Asian markets is the lowest percentage registered since April.
- 本月分别有16%的人选择了其他所有措施。关注快速复苏的亚洲市场这一选项的支持率创自4月以来的最低值。

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: keeping the Supply Base at the lower percentage

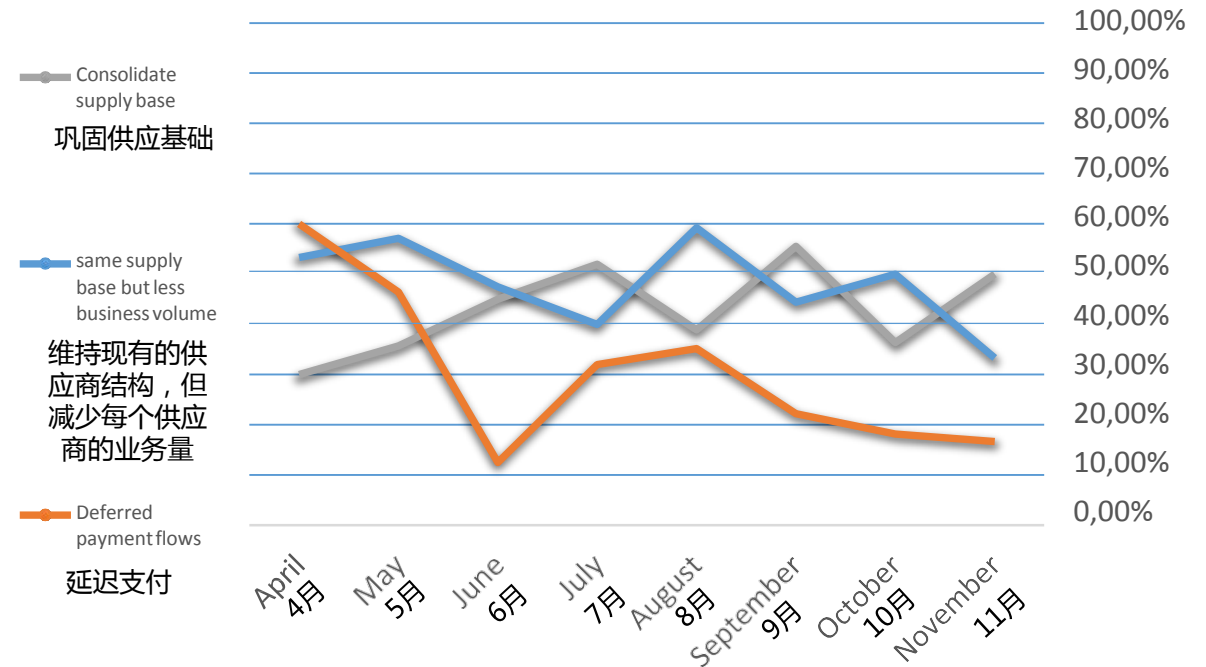
后果：维持现有供应商结构的支持率较低



- Since July, there is an alternating of the majority between consolidating the supply base and keeping the supply base but attributing less orders to each supplier.
- 自7月开始，每个月最受欢迎的选项不是“巩固供应基础”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 continuing 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?



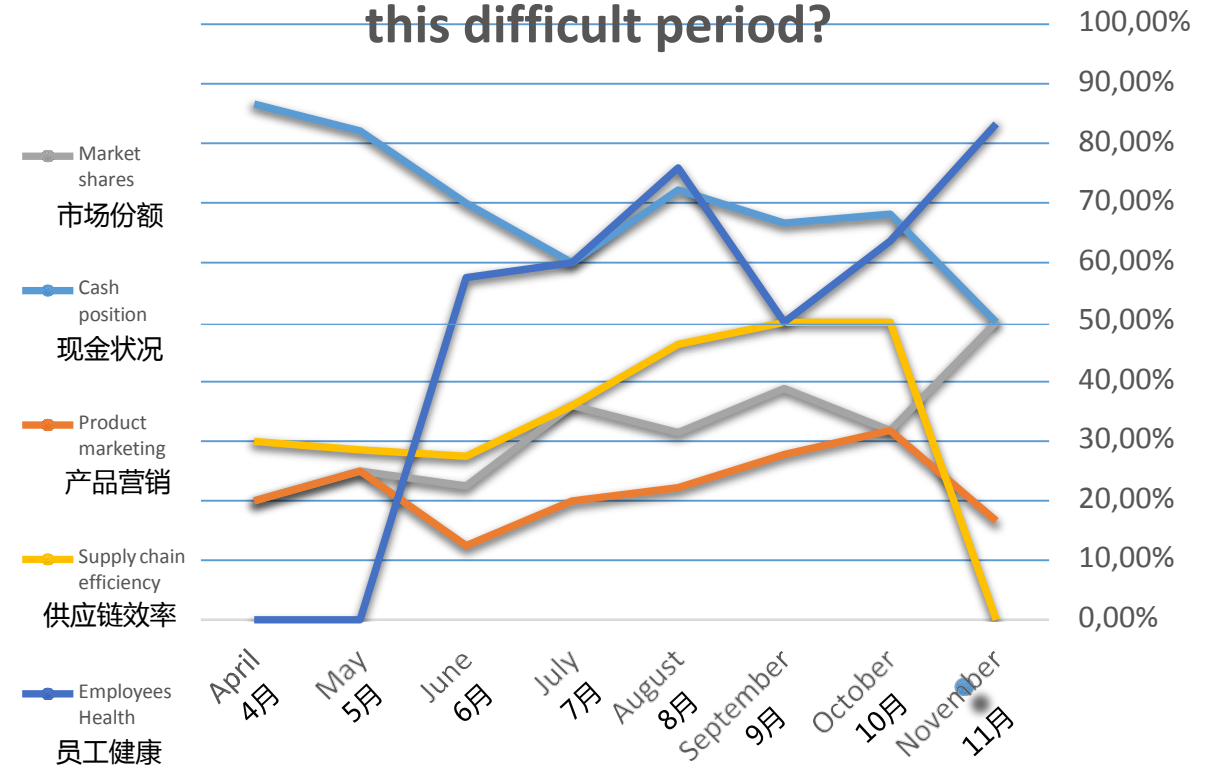
PRIORITIES: employees health at his highest 侧重点：员工健康创新高



- Market share and Cash position are both at 50% of respondents setting these priorities but the highest score for this month is Employees Health with 83%.
- 选择市场份额和现金状况的受访者占比均为50%，而获得最高支持率的是员工健康，占比83%。
- Supply chain efficiency went back to 0% (last month was 50%) and the Product marketing is reduced to 16% from last month.
- 供应链效率的选择率再次为0（上月为50%），产品营销下降至16%。

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 on the top

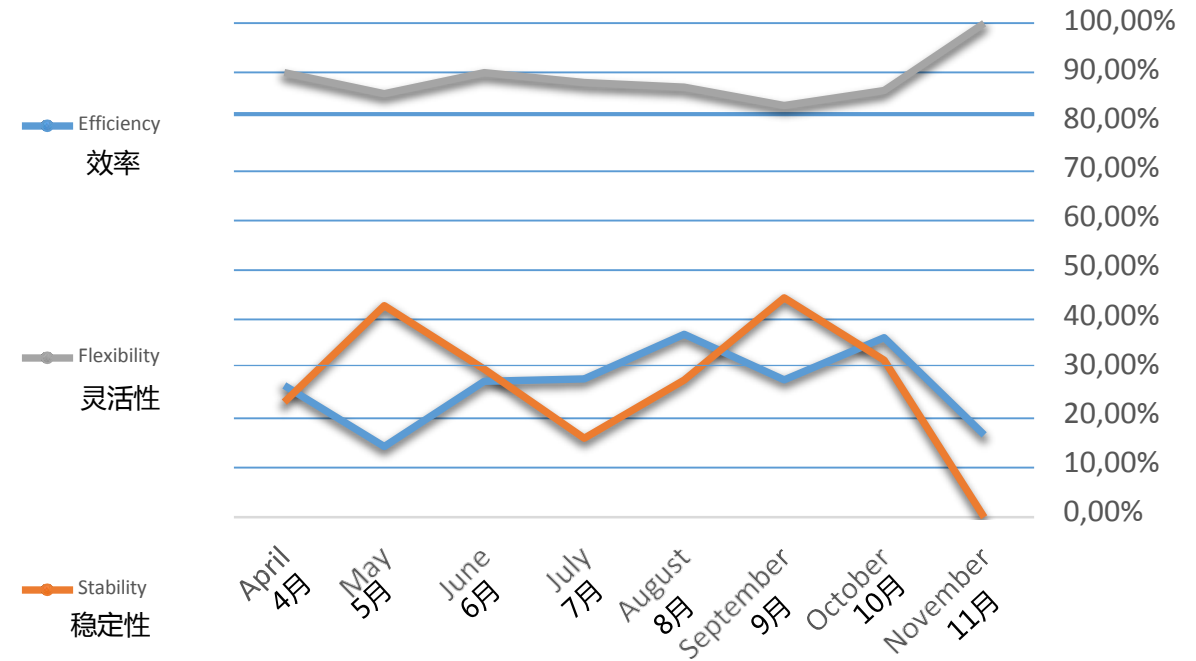
对供应商的期望：灵活性位居榜首



- With 100%, the flexibility of suppliers confirm its leading position throughout the beginning of this survey.
- 关注供应商灵活性的受访者占比达到100%，明确了其自调研开始以来的领先地位。
- Efficiency was chosen from 16% of the respondents.
- 有16%的受访者选择了效率。

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: Transformation to be lean and adaptive

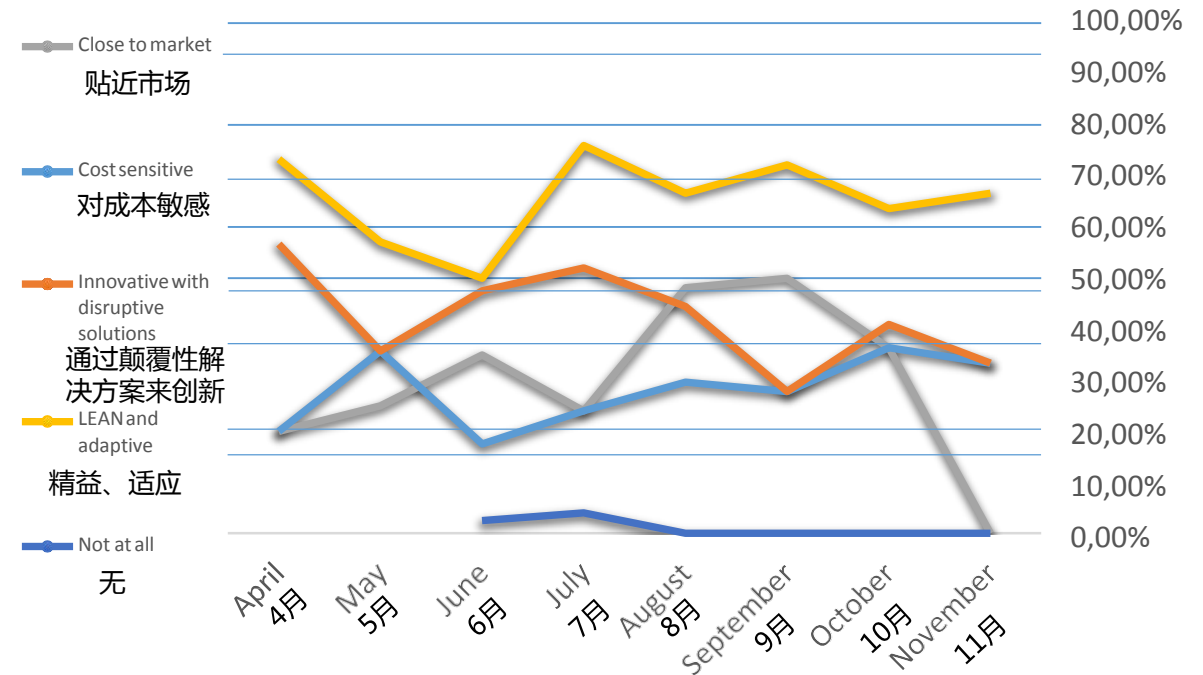
供应链转型：精益、适应性转型



- Lean and adaptive supply chain transformation is remaining the most attractive solution with over 66% 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66%的受访者支持这一选择。
- 33% of the respondents respectively chose being Cost sensitive and Innovative with disruptive solutions, which is slightly a lower percentage since last month.
- 分别有33%的受访者支持对成本敏感和创新，该数据较上个月有所下降。
- Being close to the market is down to 0% for the first time since the beginning of this survey.
- 贴近市场的支持率自调研开始首次为0。

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: No change is needed

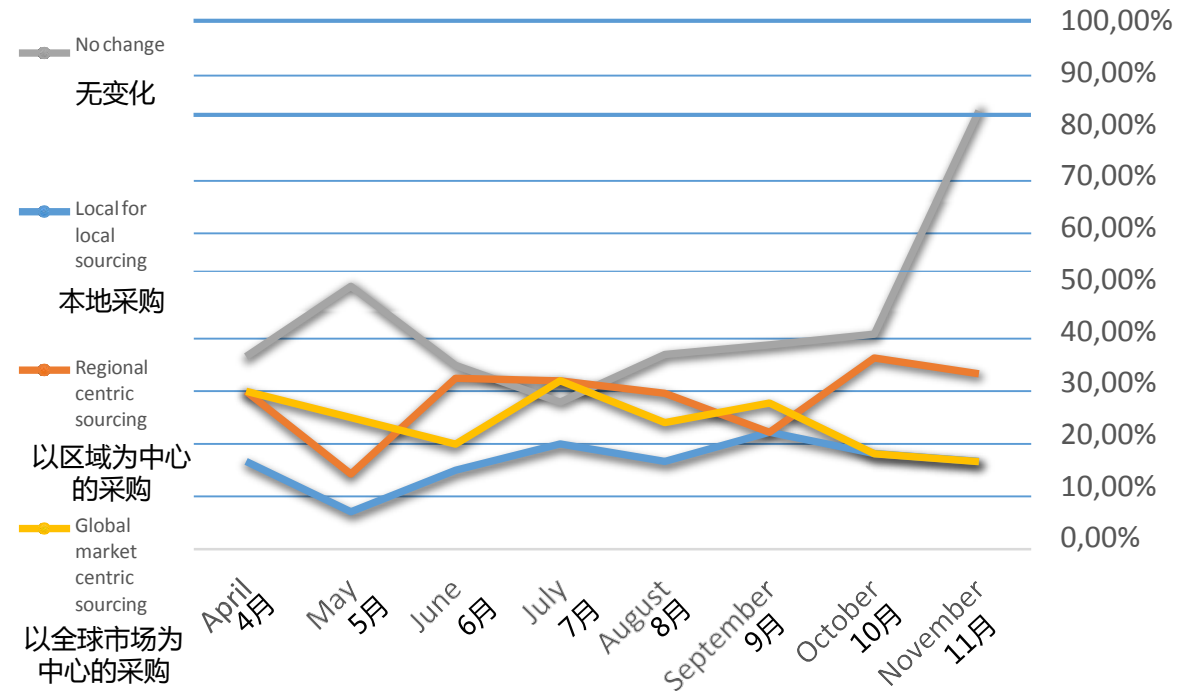
采购优先顺序：不需要改变



- With a surge of 80%, the respondents confirmed this month that they do not intend to reframe their sourcing priorities.
- 不打算重新规划采购优先顺序的受访者占比本月激增至80%。
- Regional centric sourcing remains over 33%.
- 以区域为中心的采购获得了33%以上的受访者支持。
- Local to local and global market centric sourcing are both only selected by a little more than 16%.
- 本地到本地和以全球市场为中心的采购的占比都只略超过16%。

疫情结束后，您的采购重点是？

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



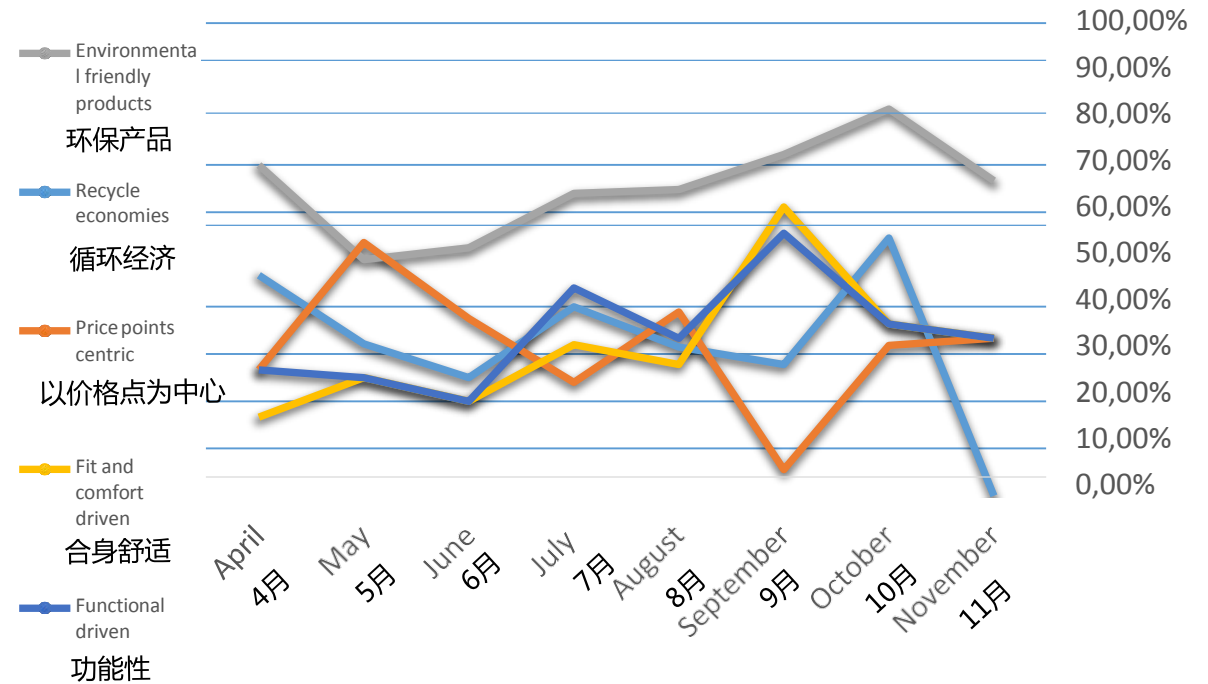
MARKET TRENDS: Environmentally Friendly Products remain Ahead of the Rest

市场趋势：环保产品遥遥领先



- Since May environmentally friendly products is remaining, with over 66% of participants, the most chose trend.
- 自5月开始，越来越多的人支持环保产品，本月有超过66%的受访者做出了这一选择。
- The trends price points centric, fit and comfort driven and functional driven have gained over 33% of votes.
- 以价格点为中心、合身舒适和功能驱动这三个选项分别获得了超过33%的支持率。
- On the other side, recycle economies is no longer a trend option for this month and reached the 0% since the beginning of this survey.
- 另一方面，循环经济本月不再受到关注，自调研开始以来首次支持率为0。

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

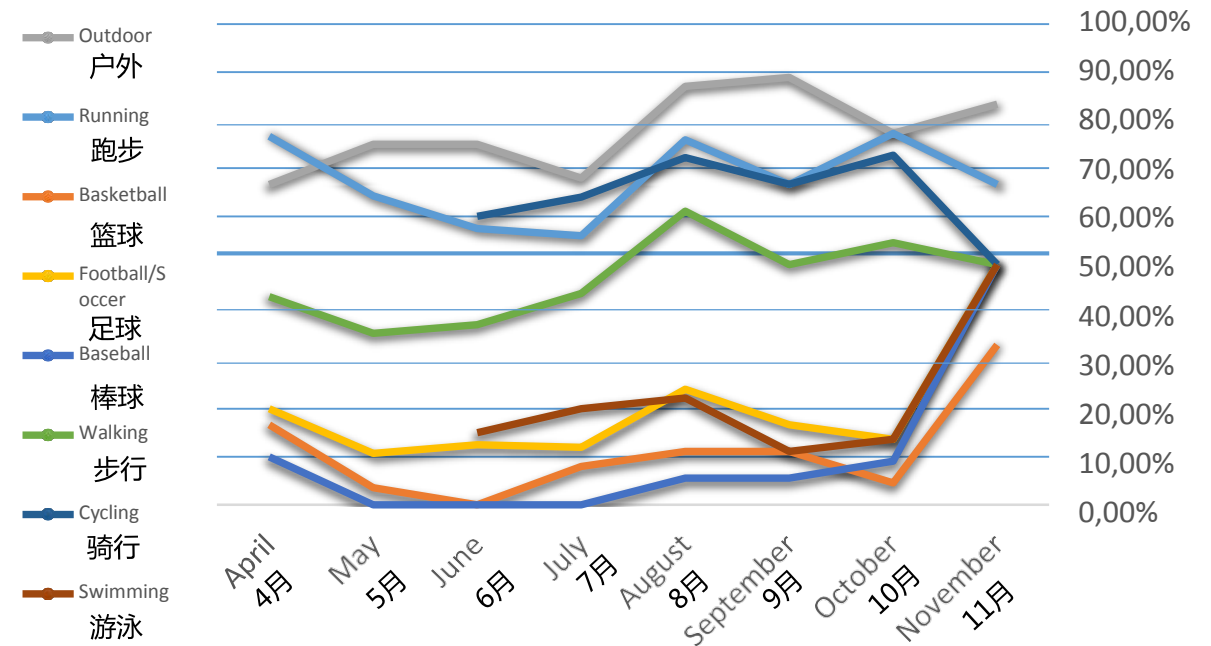


PREVAILING SPORTS AFTER THE PANDEMIC: Outdoor will prevail the product categories 疫情后的流行运动：户外运动占主导地位



- Outdoor took back the lead with over 83% as the product category that will prevail after the pandemic followed by Running with over 66%.
- 户外运动以超过83%的支持率重新占据主导地位，成为疫情后最受欢迎的产品类别，其次是跑步，支持率超过66%。
- Football, Baseball, Walking, Cycling and Swimming are equally selected from 50% of the respondents.
- 选择足球、棒球、步行、骑行和游泳的受访者占比均为50%。
- Basketball increased from over 4% to 33% this month.
- 篮球的支持率自4%上升至33%。

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 下次调研



Thank you for your support!

感谢您的支持！

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！

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KEEP SAFE & HEALTHY 保重

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