

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

August 2020 2020年8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



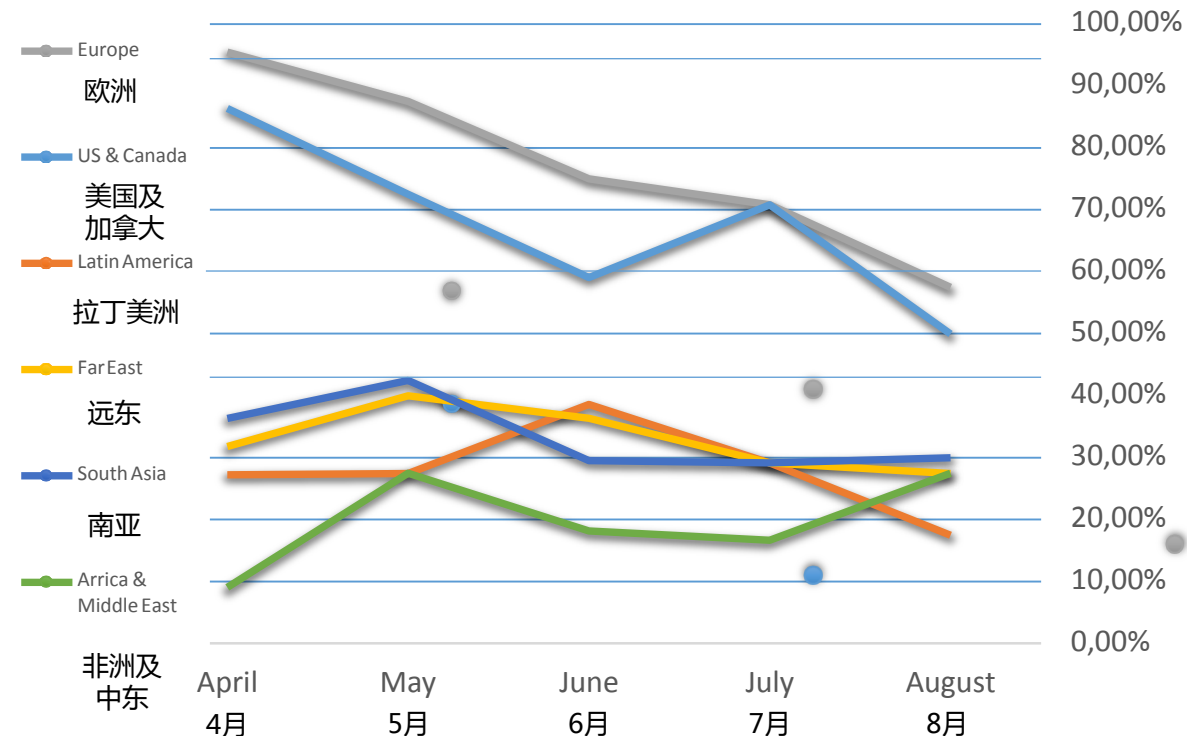
DEMAND: Significant Decrease from the Americas and Europe

需求：来自美国和欧洲的需求大幅减少



- Compared to last month the demand from the US and Canada has significantly dropped by 20%.
- 与上个月相比，来自美国和加拿大的需求大幅下降了20%。
- For Europe a decrease of the demand of 13% has been recorded. This clearly shows a negative trend that persists since the beginning of the pandemic.
- 欧洲的需求下降了13%。这清楚地说明了自疫情爆发以来一直存在的消极趋势。
- 25% don't face any decreasing orders at all, that's exactly the same percentage as last month.
- 25%的公司没有面临订单减少的情况，这一比例与上个月结果持平。

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



LOGISTICS: Material shortage again more of an issue

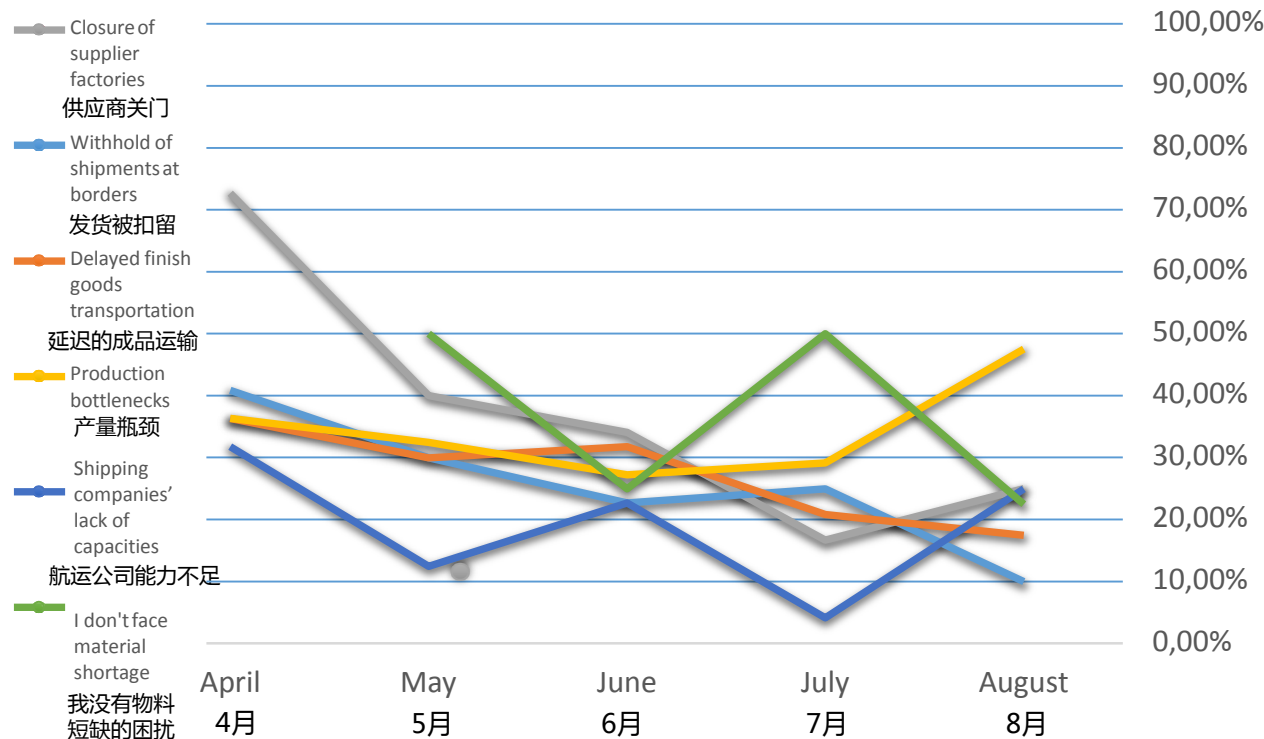
物流：材料短缺再次成为问题



物料短缺的原因是

Are you facing material shortage due to:

- Compared to last month double as many respondents face material shortage.
- 与上个月相比，面临物资短缺的受访者数量增加了一倍。
- Delayed finished goods transportation and withhold of shipments at borders are continuing to be less of an issue.
- 延迟的成品运输和发货被扣留仍然不太算是个问题。
- The positive trend shown in the past month for production bottle necks and closure of supplier factories has abruptly stopped this month as both are increasingly a challenge for the industry.
- 过去一个月出现的生产瓶颈和供应商工厂关闭的积极趋势在本月突然停止，这两种情况对行业来说都是越来越大的挑战。

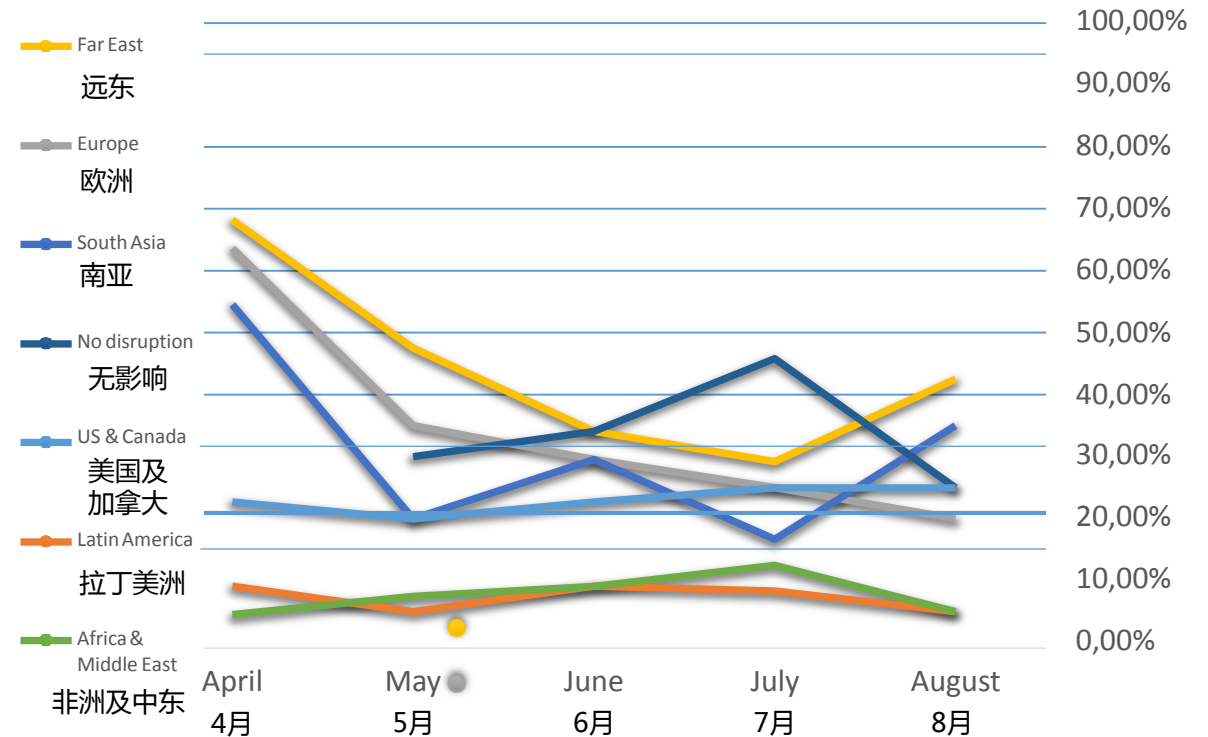


SUPPLY: significant improvement 供应：显著好转



- The number of respondents facing disruption has dropped by significant 20%, that's so far the most important decrease recorded.
- 面临供应链中断的受访者数量大幅下降了20%，这是迄今为止记录到的最重要的下降。
- The positive trend for Europe and Latin America continues.
- 欧洲和拉丁美洲的积极趋势仍在继续。
- The numbers for Northern America remain stable.
- 北美的数字保持稳定。
- For Far East, Africa and Middle East and South Asia an increasing number of respondent face disruption again.
- 对于远东、非洲、中东和南亚，越来越多的受访者再次面临中断。

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



LABOR: Globally increasing infections cause labor shortage

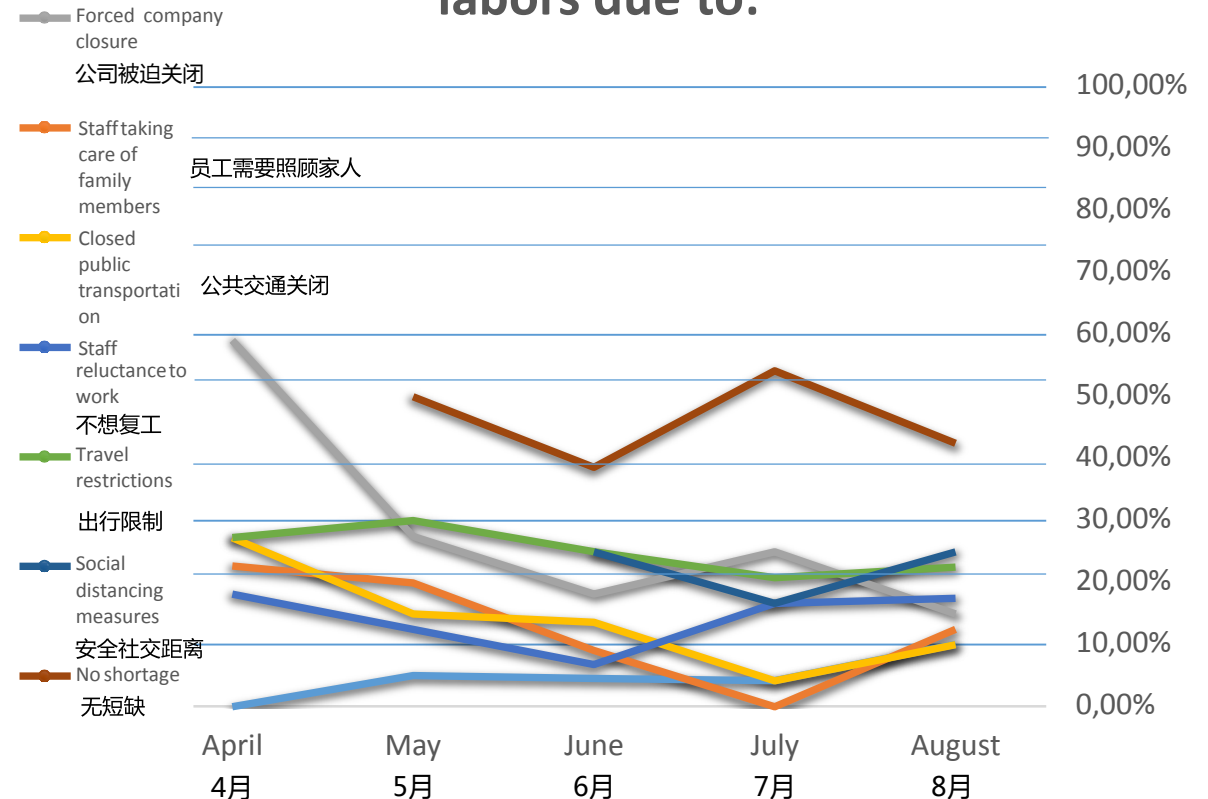
劳工：全球不断增加的感染病例导致劳动力短缺



- 12% more respondents that last month face again labor shortage.
- 面临劳动力短缺的受访者数量较上个月增加了12%。
- The number of respondents having staff being infected by Covid-19 has more than doubled. Also, the staff taking care of infected family members is again up to 12% whereas it was 0% last month. This development mirrors the global trend of countries reporting increasing number of infections.
- 员工感染新冠肺炎的受访者数量增加了一倍多。此外，需要照顾受感染家庭成员的工作人员再次上升到12%，而上个月该数字是0%。这一发展反映了感染人数不断增加的全球趋势。
- Also more than double as many respondents as last month face closed public transportation causing labor shortage. In addition, close to 10% more than last month are challenged by social distancing measures in place.
- 面临公共交通封闭导致劳动力短缺的受访者人数是上月的两倍多。此外，受到安全社交距离挑战的受访者较上个月增长了近10%。
- The numbers for travel restrictions and staff being reluctant to return to work are remaining stable.
- 反映出行限制和工作人员不愿返回工作岗位的人数保持稳定。

劳工短缺的原因是

Are you confronted with shortage of labors due to:

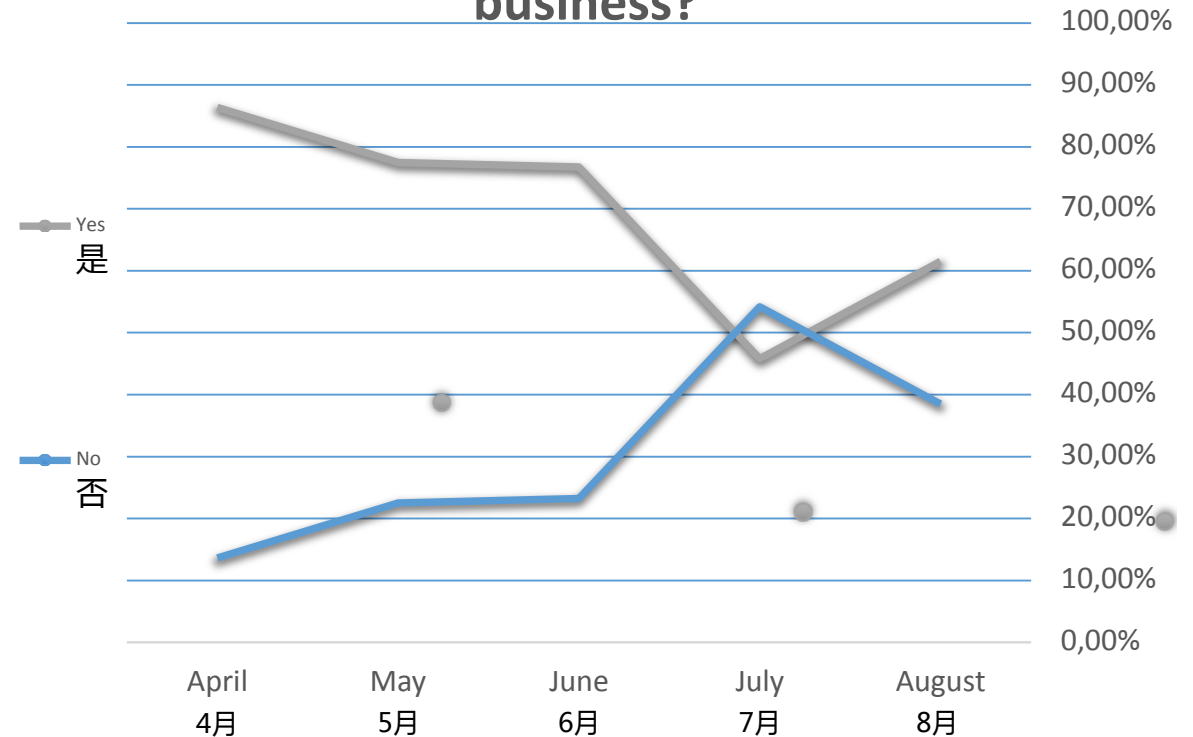


LEGAL: Interrupted positive trend 法规：中断的积极趋势



- The positive trend of the past months has been interrupted. Again, more respondents are impacted by legal measures taken by the local governments.
- 过去几个月的积极趋势已经中断，更多的受访者受到地方政府采取的法律措施的影响。

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: no changes at all

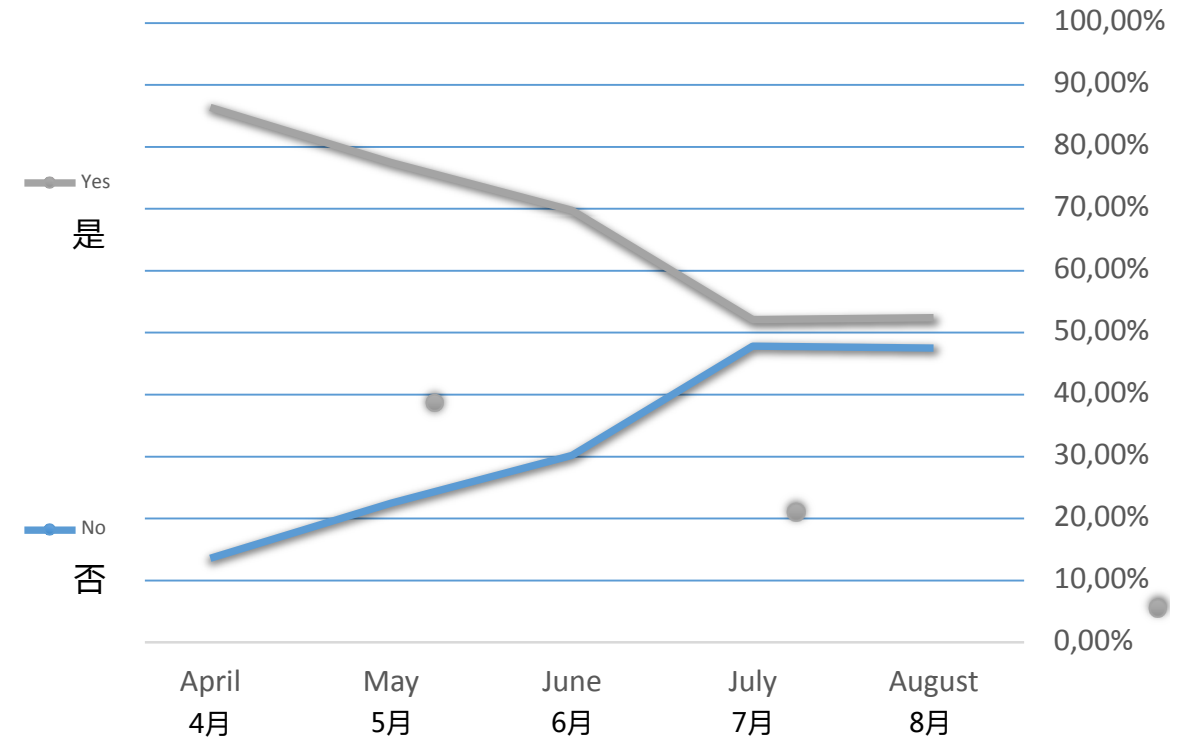
财务：完全无变化



- There is close to no change compared to last month and still just a small majority of respondents face cash flow challenges.
- 结果与上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: Slightly more optimism recorded

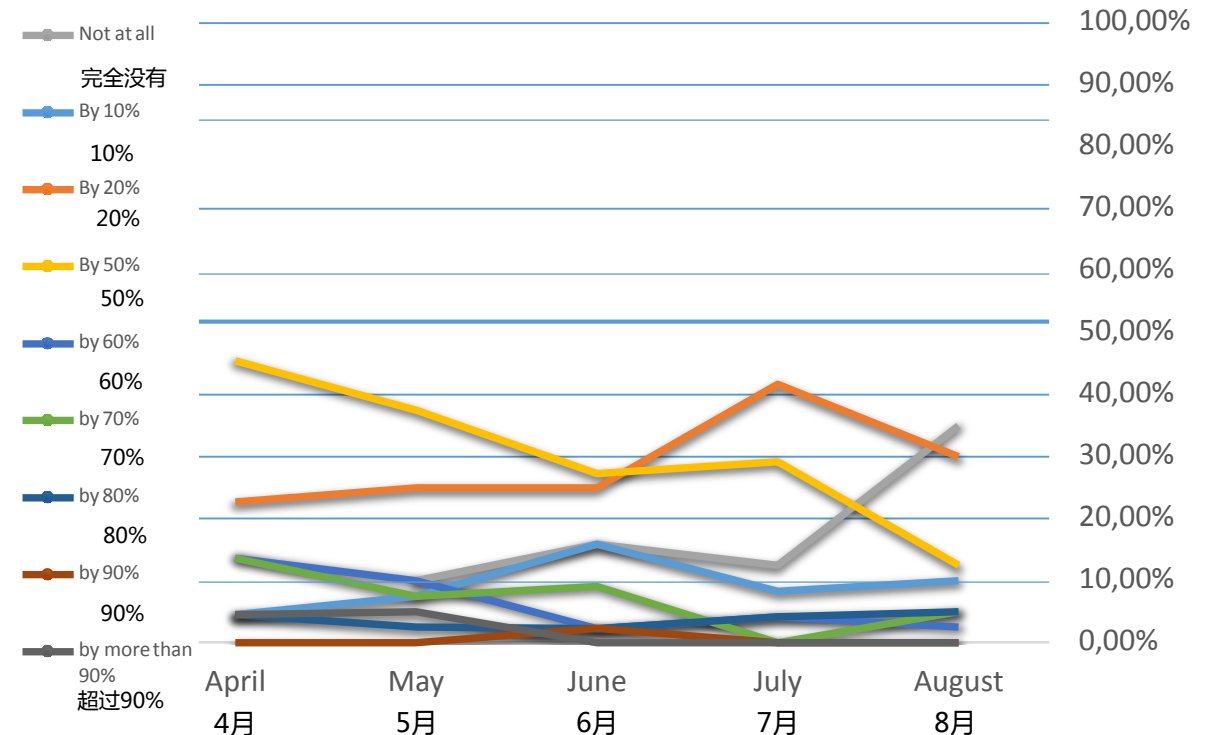
业务预测：反馈稍许乐观



- Only 65% of respondents see their business being impacted by COVID-19. This is by far the most promising result so far since April. Last month still 87.5% saw an impact.
- 只有65%的受访者认为他们的业务受到疫情的影响。这是自4月以来迄今为止最乐观的反馈。上个月仍有87.5%的人认为受到了影响。
- Most respondents see a business drop by 20% (30% of respondents) and a decline of 50% (12.5% of respondents).
- 大多数受访者认为业务将下降20%（30%的受访者）和50%（12.5%的受访者）。
- The most affected regions remain Europe and Northern America where around 50% expect less business.
- 受影响最严重的地区仍然是欧洲和北美，约有50%的人预期业务会减少。

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 full recovery

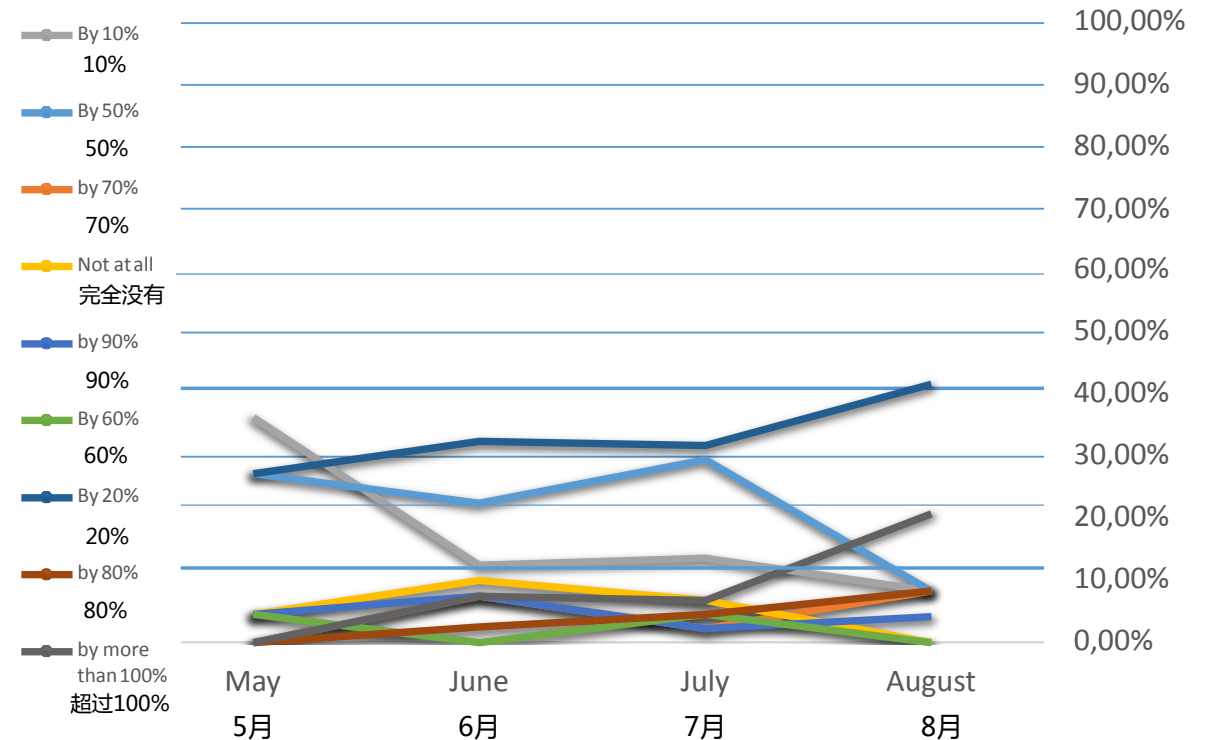
商业预测：对全面复苏的信心降低



- Whereas in July the first time 0% of respondents didn't expect any rebound, this month we are back to 10%. Also, only 10% expect a full recovery which is half as many as in July.
- 7月，第一次有0%的受访者认为经济不会复苏，而本月该数字又回到了10%。此外，只有10%的人预计经济将全面复苏，这一数字是7月结果的一半。
- Most respondents expect a recovery of 50%; followed by a recovery of 20% and 10%.
- 大多数受访者预计复苏比例为50%；其次是20%和10%。
- There are less respondents expecting a recovery over 50% this month: 5% expect a recovery of 60% respectively 80% and only 2.5% expect their business to bounce back to 70%.
- 预期本月恢复超过50%的受访者较少：分别有5%的受访者预期复苏比例为60%及80%，只有2.5%的受访者预计业务将恢复至70%。
- With regard to the time frame necessary for the recovery, the trend is not showing any significant change: 45% think that their business will need more than one year (last month 50% opted for this answer). 32.5% still guess that 91-180 days are necessary for their company to rebound.
- 至于经济复苏所需的时间范围，趋势并没有出现明显变化：45%的人认为他们的业务需要一年以上的恢复期（上个月50%的人选择了这个答案）。32.5%的受访者仍认为恢复期需要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: Production consolidation again the most popular option

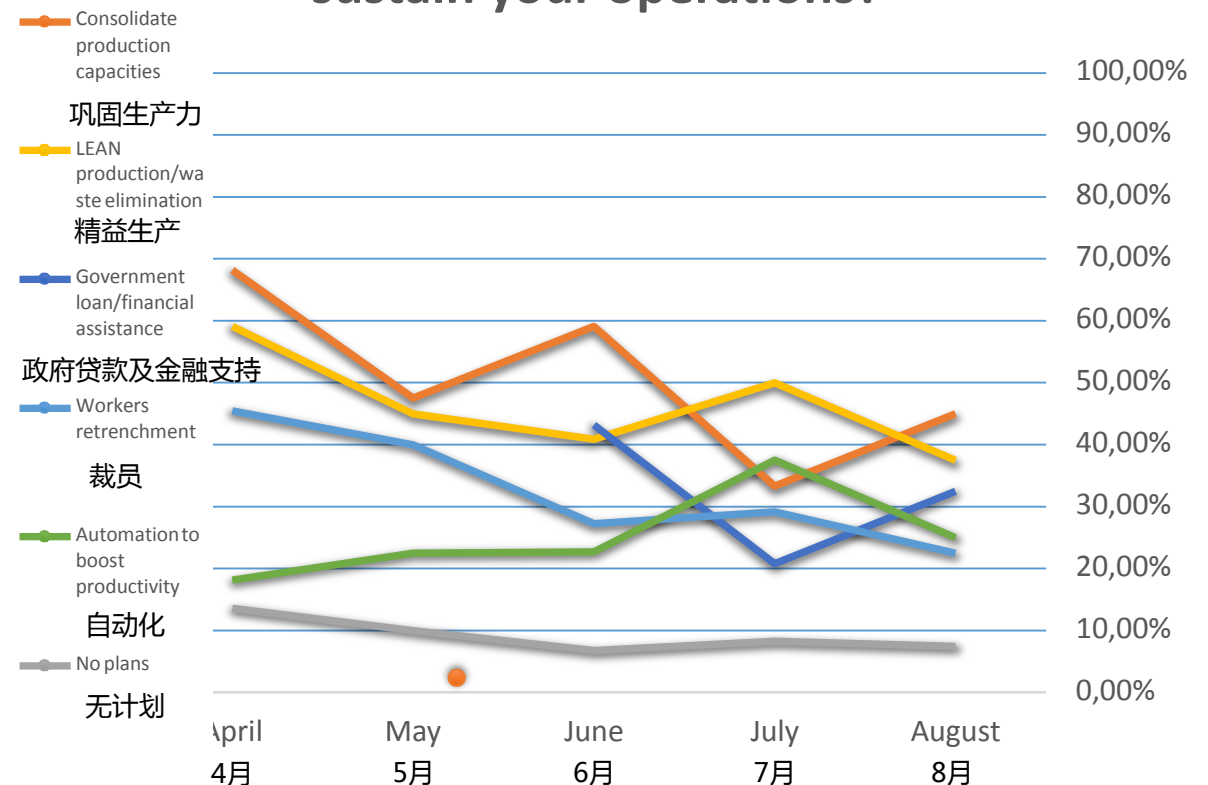
PRODUCTION

所采取的措施：巩固生产力再次成为最热门选择



- The trend for automation has shifted the first time as less people opt for that measure this month (only 25% compared to 37.5% last month) most popular options are adopting lean production and automation. The latter was only the second last option chosen in June.
- 自动化的选项第一次呈现下降趋势，因为本月选择这一措施的人越来越少了（仅25%；8月数据为37.5%），最受欢迎的选择是采用精益生产和自动化。后者在6月仅是排名倒数第二的选择。
- There is a sharp decline of companies consolidating production last month has been countered by an increase of over 10% of respondents opting for that measure again this month.
- 上个月选择巩固生产力的公司数量急剧下降，而本月数据较上月增长超过10%。
- Also, a little over 10% more respondents are turning towards governmental support this month compared to July.
- 与7月相比，本月选择获得政府支持的受访者数量增加略高于10%。
- The number of respondents considering lean production and worker retrenchment has slightly decreased.
- 考虑精益生产和裁员的受访者人数略有减少。

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



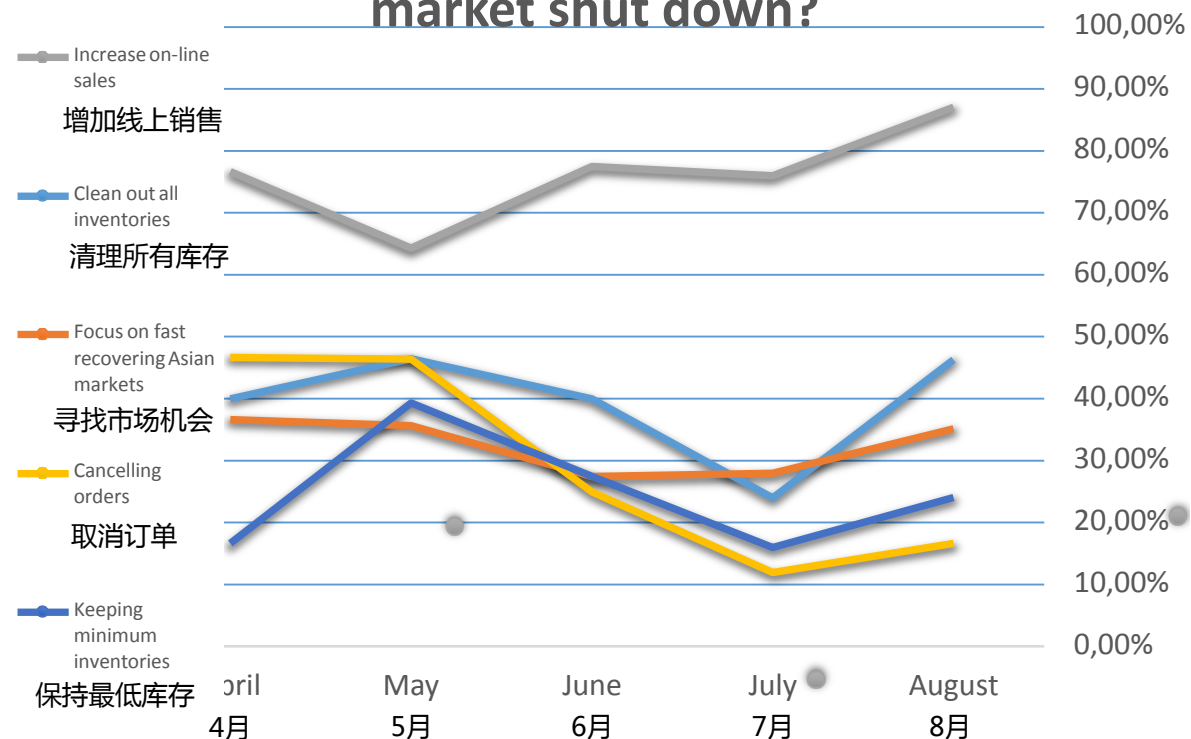
are key

减轻影响：增加线上销售&清理库存是关键

- Increasing online sales (87%) remains unchanged the most chosen option to mitigate the impact of the pandemic, there is a clear trend detectable that this measure has gained support over the past months.
- 增加在线销售（87%）仍是受访者减轻疫情影响的最佳选择。有一个明显的趋势表明，这项措施在过去几个月获得了支持。
- Focusing on the recovering market, cancelling orders and keeping minimum inventories have all gained a little more support as last month.
- 专注于复苏的市场、取消订单和保持最低库存的支持率都比上个月高。
- Clean out inventories has been chosen by nearly double as many respondents as last months (46.3%).
- 选择清仓库库存的受访者数量是上个月（46.3%）的近两倍。

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: clear plans to keep suppliers but decrease business volume

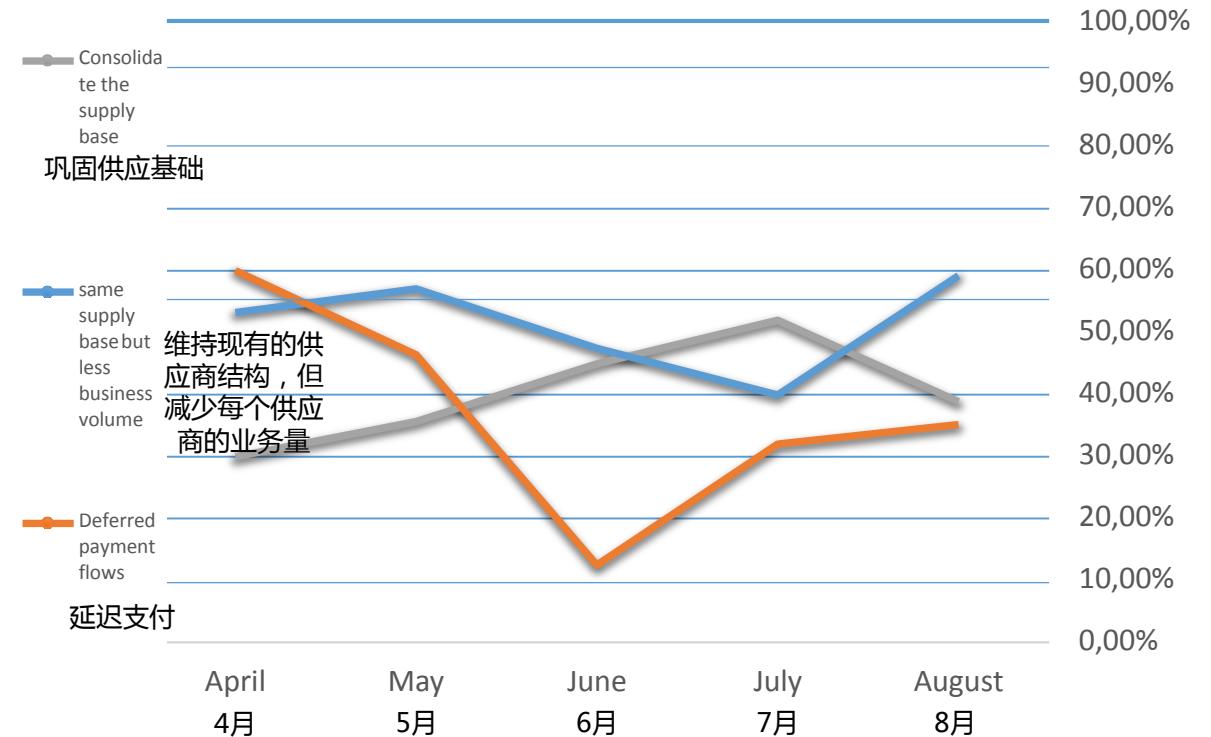


后果：明确要保留供应商但减少业务量

- For the first time since April consolidating the supply chain has not gained in importance but there was a drop of over 10%.
- 自4月份以来，整合供应链的重要性首次呈下降趋势，降幅超过10%。
- Nearly 20% more respondents opt for keeping the same suppliers but decreasing the business volume.
- 选择维持相同的供应基础，但减少业务量的受访者增加了近20%。

缓解策略对供应商有何影响？

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



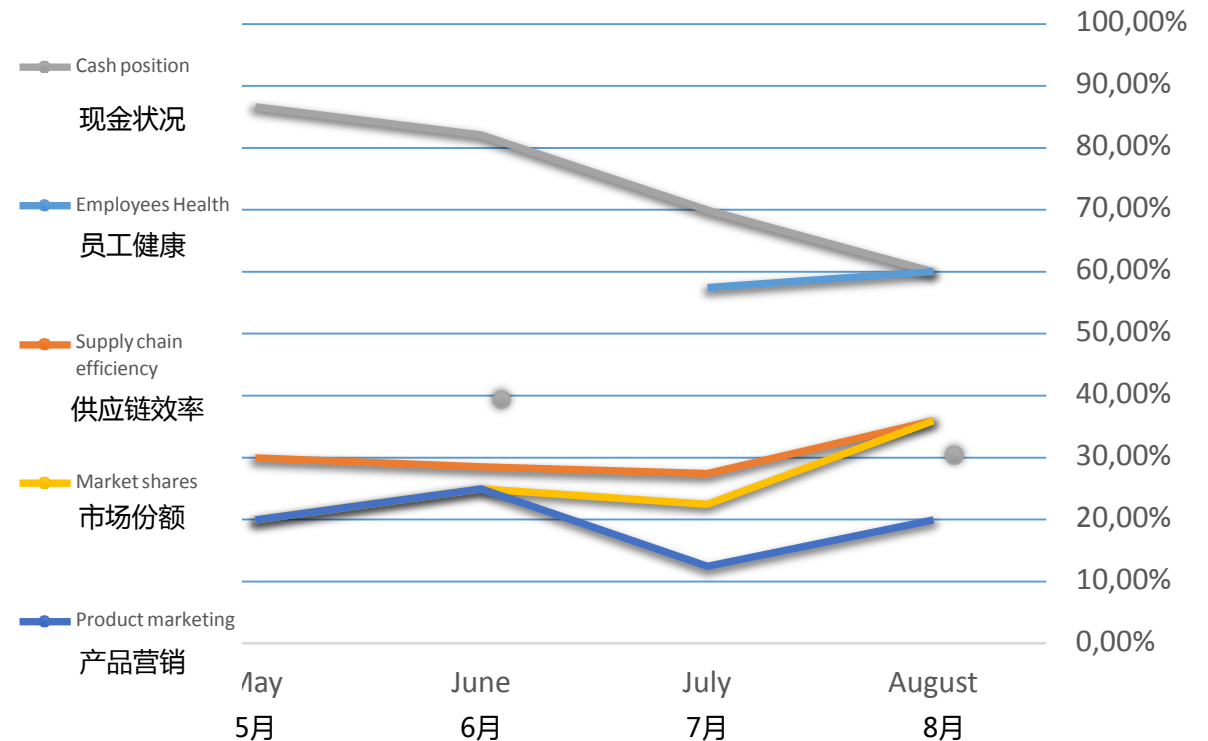
PRIORITIES: Primary focus on cash position and staff's health

侧重点：主要关注现金状况及员工健康



- Cash position is further losing importance and employees' health is of the same importance.
- 现金状况进一步失去了重要性，做出这一选择的受访者占比与选择关注员工健康的占比相同。
- Supply chain efficiency, market shares and product marketing are gaining importance.
- 供应链效率、市场份额和产品营销越来越重要。

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 REMAINS CRUCIAL

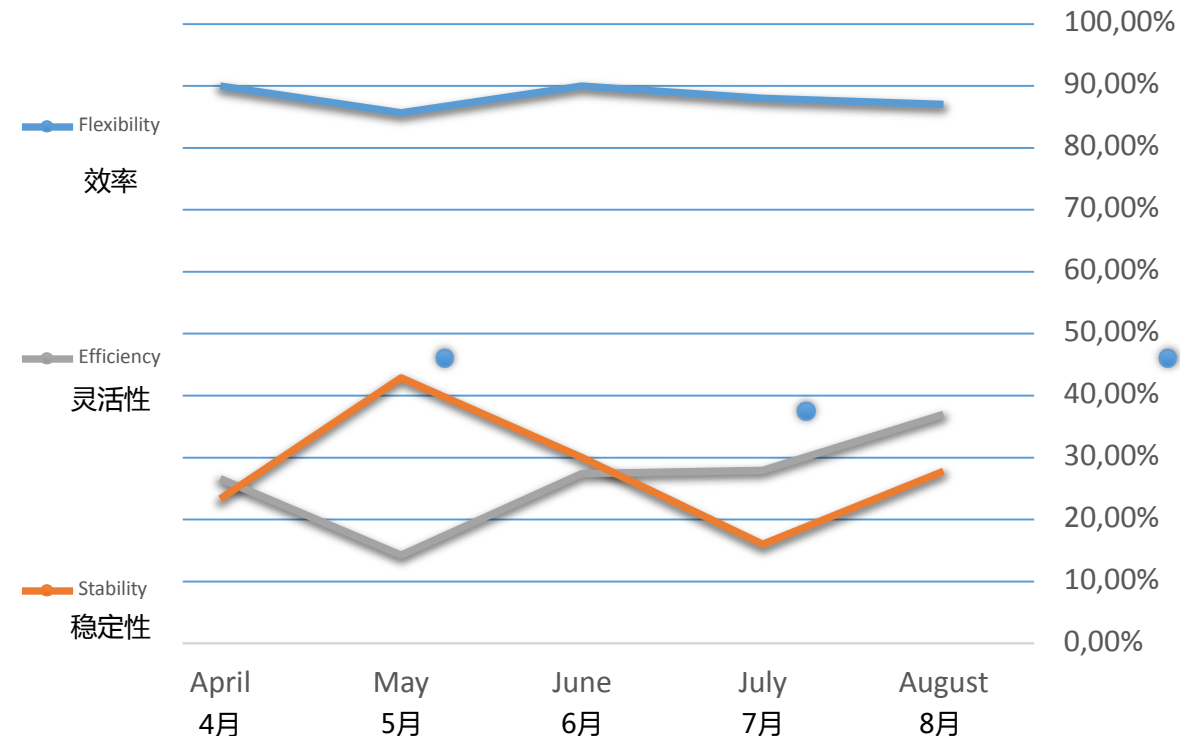
对供应商的期望：灵活性依然重要



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

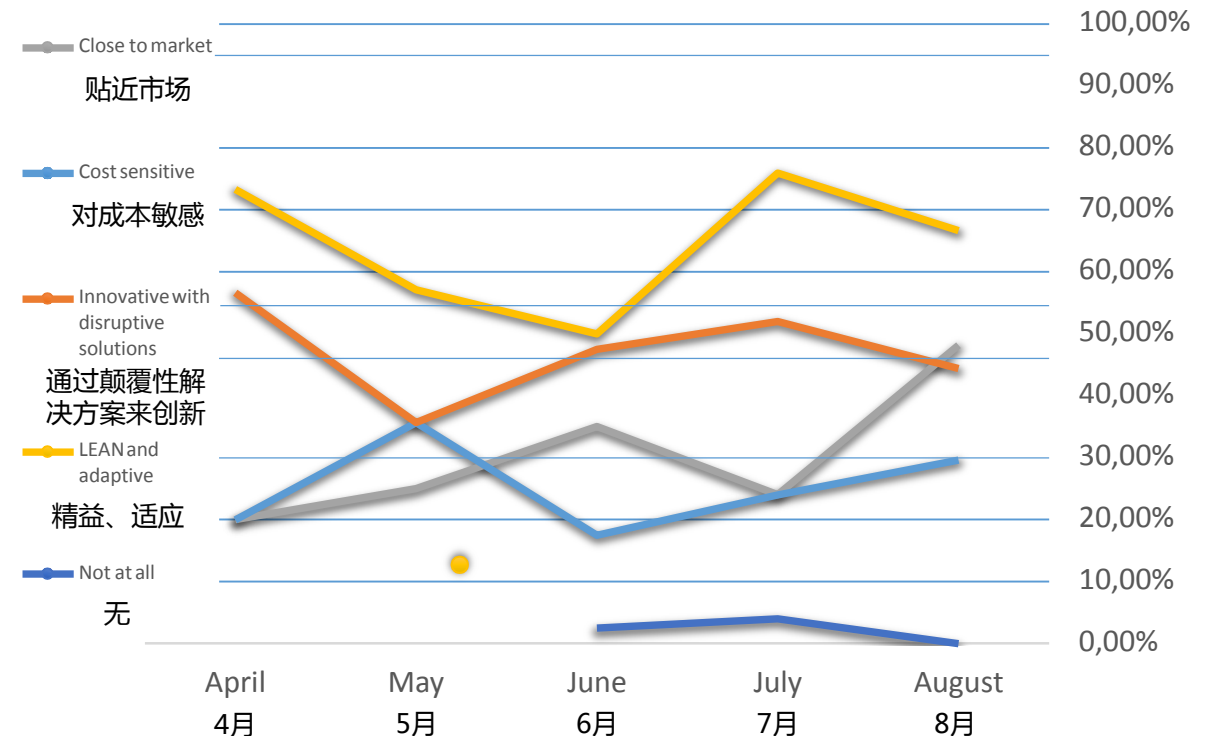
供应链转型：贴近市场的转型供应链大幅增加



- Lean and adaptive supply chain transformation is remaining the most attractive solution despite the fact that it decreased by 10% compared to last month.
- 尽管与上个月相比，精益和适应性供应链转型减少了10%，但仍然是最具吸引力的解决方案。
- Being close to the market is for the first time the second most popular transformation with nearly 50% of respondents opting for this solution.
- 向市场靠拢首次成为第二大最受欢迎的转型方案，近50%的受访者做出了这一选择。

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

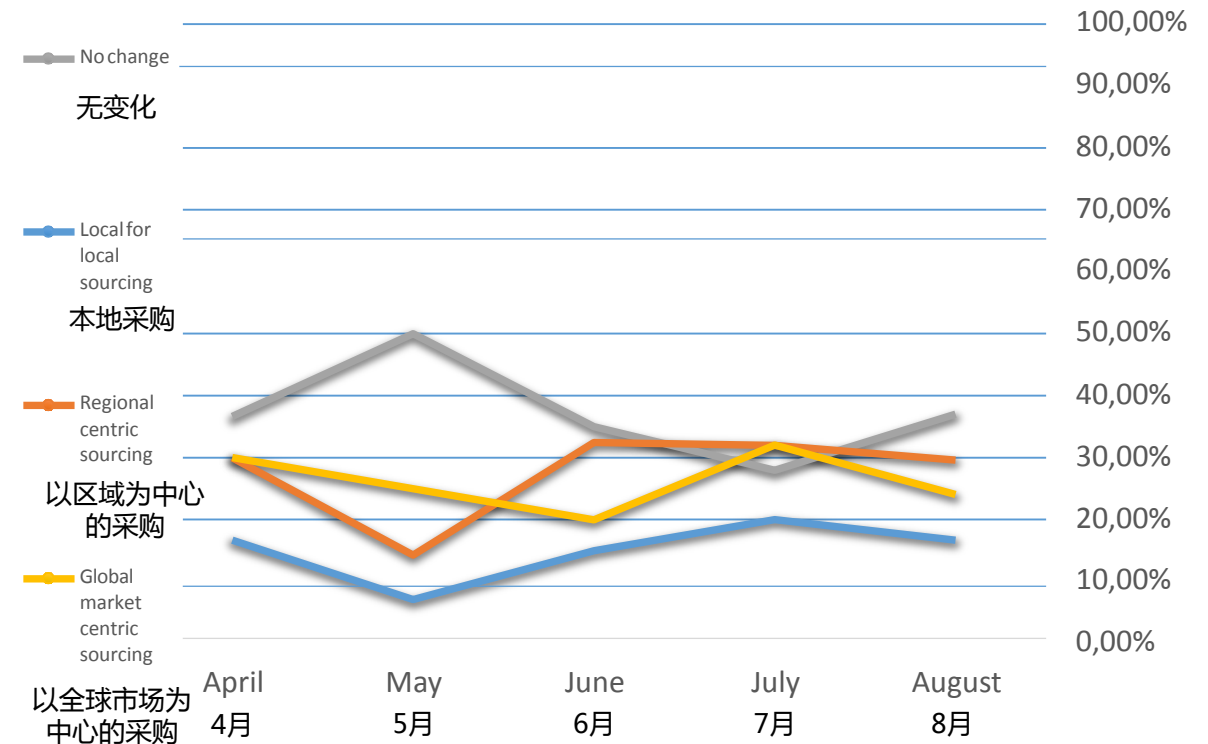
采购优先顺序：对变革的支持率降低



- Most of the respondents (37%) are not at all reframing their sourcing priorities, this is again an upwards trend.
- 大多数受访者（37%）根本没有重新规划采购优先顺序，这又是一个上升趋势。
- All other answer options have seen a slight decrease in respondents opting for them.
- 所有其他选项都显示，做出这些选择的受访者略有减少。
- Regional centric sourcing remains the most chosen reframing option.
- 以区域为中心的采购仍然是最受欢迎的重组选择。

疫情结束后，您的采购重点是？

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



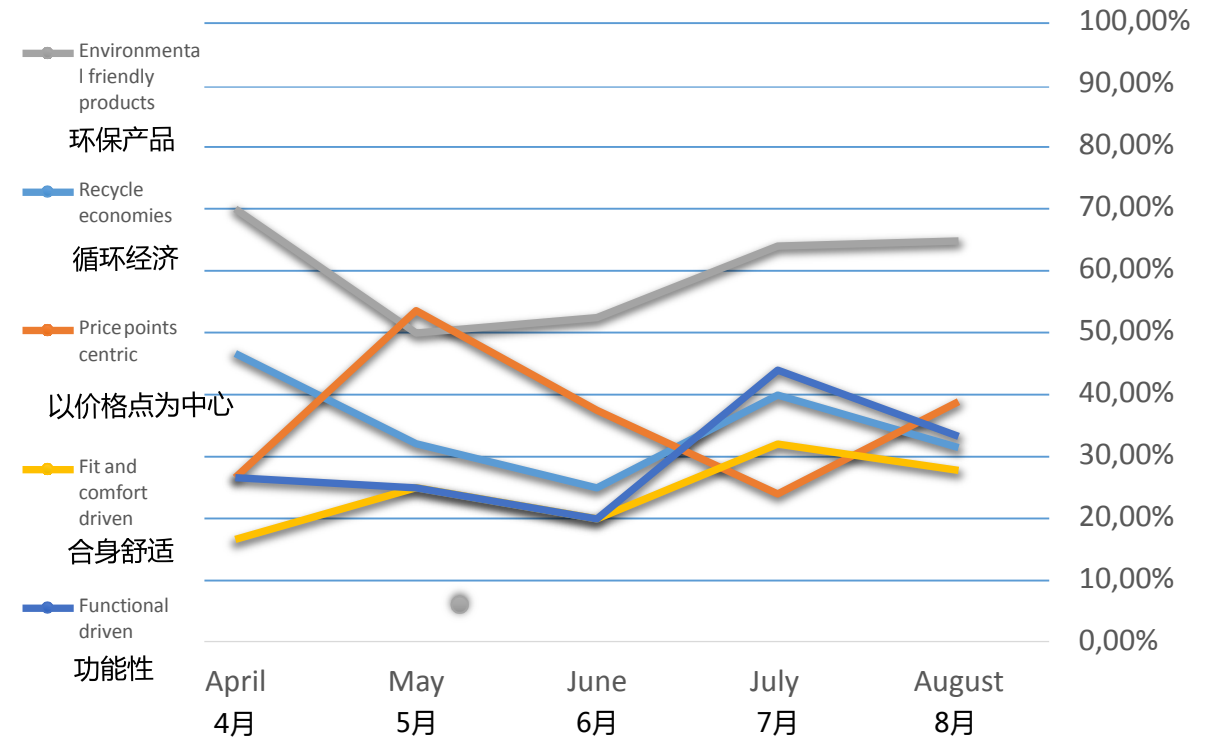
MARKET TRENDS: Environmentally friendly products trend stays ahead of the rest

市场趋势：环保产品保持领先趋势



- Environmentally friendly products are still topping the list with 65% of respondents supporting this trend.
- 环保产品仍然位居榜首，65%的受访者支持了这一趋势。
- While price points centric trends was the least important trend last month, it moved up to the second most chosen trend this month.
- 虽然以价格点为中心的趋势在上个月排名最后，但它成为本月第二大选择。
- All other trends are losing support of more than 5% more respondents compared to July.
- 与7月相比，所有其他趋势都失去了超过5%的受访者的支持。

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: Individual outdoor

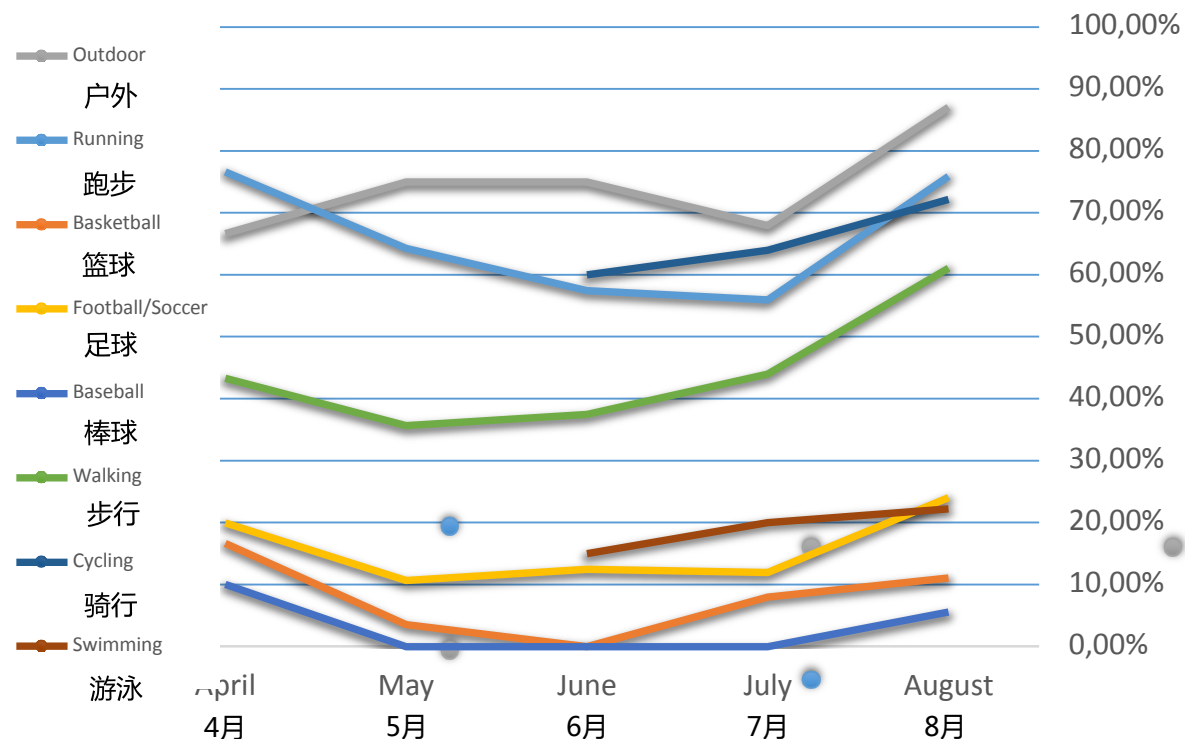
sports are topping the chart

疫情后的流行运动：个人户外运动位居榜首



- The sports topping the charts are seeing the highest increase of support this month: outdoor, running, cycling and walking are all chosen by over 60% or respondents.
- 位居榜首的运动项目本月的支持率增长最高：户外运动、跑步、骑行和步行都有超过60%的受访者选择。
- All other sports remain at a low level but see a very weak increase as well.
- 所有其他运动项目增长都非常微弱，均保持在低水平。

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 SEPTEMBER 2020 下次调研 – 2020年9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

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, E-mail: mmagnus@wfsgi.org