

China: your sports market of the future

June 19, 2019

Outdoor Retailer, Denver (CO)



Messe München
Connecting Global Competence



China at a glance

- Slightly larger than the US
→ 3.705.000 mi²
- Climate: all climate zones - from cold and snowy in the north to tropical in the south
- Population: 1.4 billion
- 160 cities with more than 1 million inhabitants



Tier cities: a national classification system

Chinese cities are ranked into 5 “tiers” by the following criteria:

- population size
- development of services and infrastructure
- cosmopolitan nature

Big differences between tiers:

Consumer behavior, income level, buying power, local preferences and trends



China's sport market will continue to grow

China's political leadership has clearly committed itself to making sports and fitness more attractive and accessible to the population.

- Five-year plan issued by China's State General Administration of Sports in May 2016: by the end of 2020, the total turnover within China's sports industry will amount to **more than \$ 460 billion**.
- Goal of the Chinese government: **20% annual growth** for the winter sports industry until the 2022 Olympic Winter Games in Beijing.
- In 2015, "Fitness for All" became part of the national strategy. The goal: **500 million Chinese** are to become regular athletes by 2025.

\$ 58 billion

Total output value of China's sports industry in 2015



\$ 460 billion
Market size by 2020.

China: The sports market of the future



1.4 billion population

An increasing middle class is hungry for sports and leisure activities.
> 415 Mil. millennials are ready to purchase sport products.



70% look for high quality

By 2020, 70% of Chinese consumers will belong to the middle (55%) or high-end (15%) market segments. One billion consumers will be asking for superior quality products, which is three times the number of all the consumers in Europe and the USA combined.



900 Mil. e-commerce shoppers

China is the 2nd largest e-commerce market for sports and outdoor products (1st USA).
In 2020, an estimated 900 million Chinese consumers will shop online.

Outdoor

\$ 9.4 Billion - Turnover in the Chinese Outdoor Market

More and more people are doing sports in general and outdoor sports in particular. According to studies and e-commerce reports, the sales volume in the Chinese outdoor market is now **\$ 9,3 billion**.



How important are international outdoor brands in China?

The international brands have a **higher market share** than the Chinese producers. Arc'teryx, Columbia, Garmin, Osprey, Salomon, The North Face are among the most relevant international brands in the market. Kailas and Toread are the top Chinese brands.

Outdoor became part of the Chinese lifestyle

Camping is particularly popular among young and middle aged people.

Running

Enormous growth rates for running

The number of marathons and running events increased by **150%** between 2015 and 2016. In 2016, 2.8 million runners participated in racing. That's 180% more than the previous year.



44% run

Running is regarded as the most popular and the most important sport for Chinese people. 44% of sports-playing Chinese count running among their main activities. In Germany 25% count running among their main activities.

5 million marathon runners

In 2017, 5 million people participated in 1102 marathon races. By 2020 around 1,900 races will attract **10 million runners** annually

Health & Fitness

The number of gyms is rising very fast in China

In 2001, the Chinese gym-goer was limited to roughly 500 options for training facilities across the nation. Today that number has grown massively, to over **37,000 gyms**.



Multipurpose gyms: China joins the workout lifestyle trend

Multipurpose or boutique style gyms are popping up more frequently, breaking the mold of the classic large, franchised gym. The Chinese consumer is shifting towards a gym where they can specialize in a certain exercise, like yoga, CrossFit, or Pilates.

Market for fitness apps, wearable devices

Projections for 2018 show that the fitness app and wearable device industry could generate over **\$6.5 billion** in revenue in China, far surpassing the US – the next largest market – by over a billion US dollars.

Water sports

Total size of water sports industry will reach \$ 43 billion by 2020

By 2020, the number of water sports clubs and the national water leisure sports center will increase significantly.



Swimming gains popularity

Swimming is gradually becoming one of the most popular national sports and popular among all ranges of people. Swimming pools have become very crowded. For example, after the Beijing Olympics, the Water Cube has been opened to the public with a capacity of **6,000 people**.

Over 300 boat brands in China

At present, there are more than 300+ major boat manufacturers in the national water sports.

Snowsports

2022 Winter Olympic Games in Beijing

The International Olympic Committee recognized the recent growth in the Chinese sports industry by awarding the 2022 Olympic Winter Games to Beijing.



300 million new winter sports enthusiasts by 2022

The government has launched initiatives to ensure that the number of winter sports fans will grow strongly until the Winter Olympics in three years.

Visible boom of the ski market in China

The number of ski resorts increased from 225 in 2006 to 742 ski resorts in 2018
-> an **increase of 330%**!

Developing new markets

ISPO Beijing & ISPO Shanghai



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Driven by your goals. Our Business Solutions.



ISPO Beijing. Focusing on winter sports in Asia.



ISPO Beijing. Facts & figures.

Exhibitors & Brands 2019

- more than 400 exhibitors
- 682 brands
- 30,000 trade visitors

Date & Venue 2020

- 12-15 February 2020
- China International Exhibition Center
(New Venue)
- Beijing, China

Exhibition area

- 540,000 sq ft



ISPO Beijing. Segments.



ISPO Beijing. Venue.

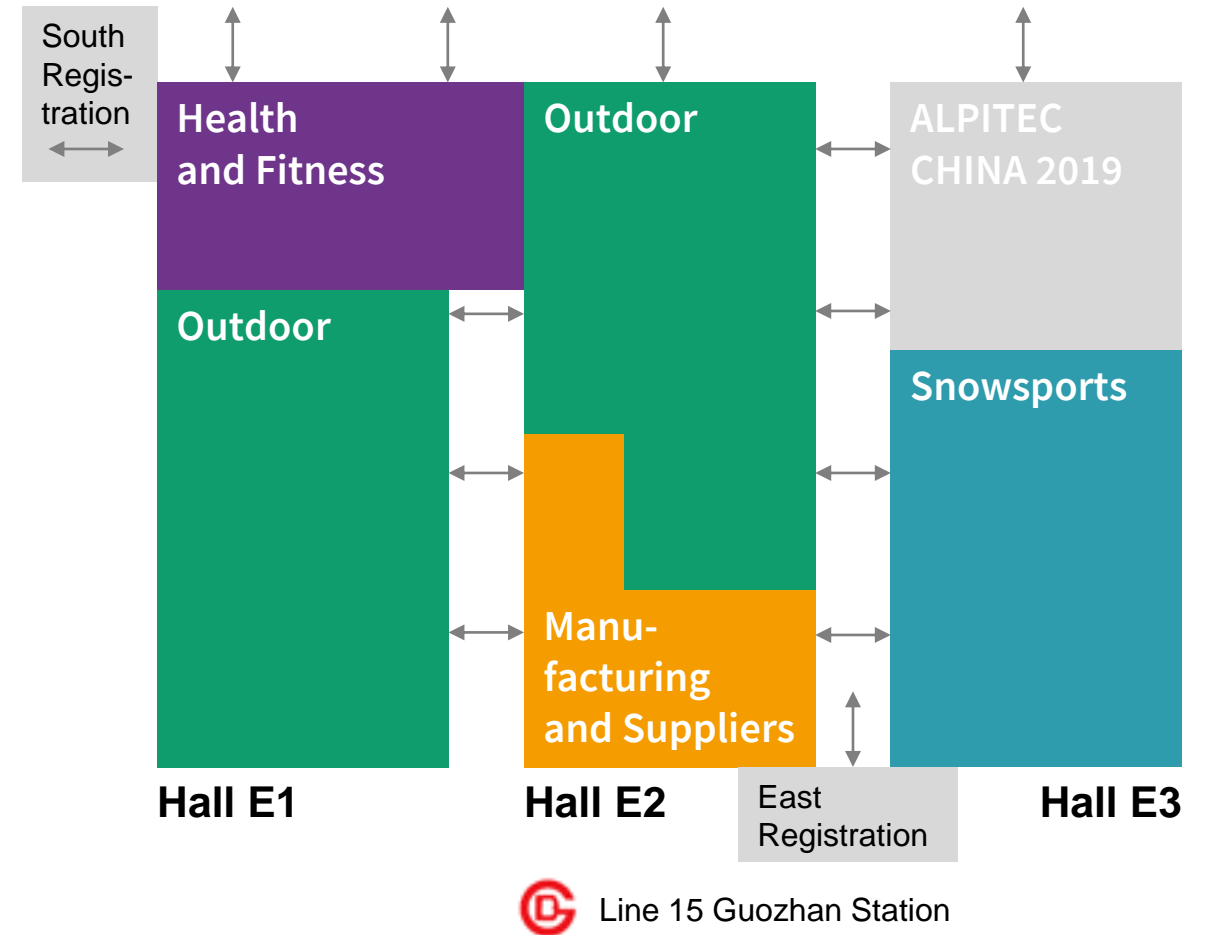
China International Exhibition Center (new venue)



Facts 2020

- February 12-15, 2020
- 540,000 sq ft

Hall overview (E1, E2, E3)



Forums to learn, grow and connect.

A large number of free conferences, forums and events accompany the trade show. Expand your knowledge and connect with experts from different fields.

- **Asia Pacific Snow Conference**
- **Sports industry forum**
- **Sports fashion trend forum**
- **Sports training and rehabilitation forum**
- **International football forum**
- **Climbing seminar**

...and many more.



ISPO Beijing 2019. Ski Resort Tour.

January 19 – 20, 2019

- Visit of 3 ski resorts in the Chongli area, incl.
- Exhibitors, visitors, stakeholders of the industry joined the tour
- Matchmaking with Managements of the ski resorts
- Guided Tours & Introduction to facilities
- Networking Dinner
- Fun on slopes



ISPO Beijing 2020:
in talks with Thaiwoo ski resort...

ISPO Shanghai. Focusing on summer sports in Asia.



**ISPO
Shanghai**



ISPO Shanghai. Facts & figures.

Since 2015 ISPO Shanghai is the platform for innovation, marketing, networking and communication for China's sports market.

Exhibitors & brands 2018

- 526 exhibitors & 655 brands
- More than 14,500 visitors

Exhibition area

- 355,000 sq ft & 3 halls

Segments

- Running, Health & Fitness, Water Sports, Outdoor, Manufacturing & Suppliers



Anniversary
ISPO Shanghai



ISPO Shanghai. Segments.



ISPO Shanghai. Venue.

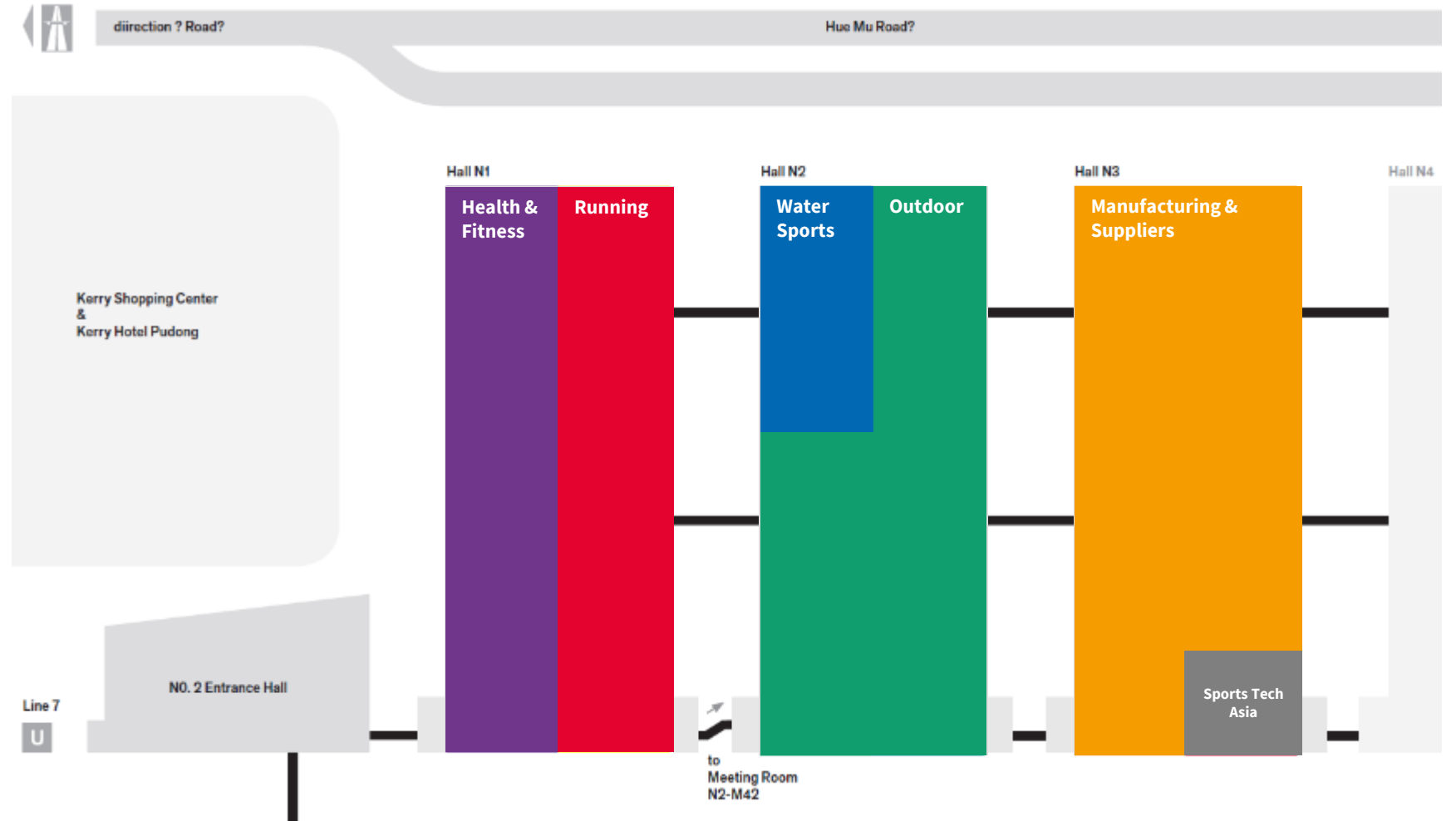
Health & Fitness

Running

Water Sports

Outdoor

Manufacturing & Suppliers



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- Retail & Digitalization Forum
- China Sports Fashion Trend Forum
- Kids & Women Sport Industry Forum
- International Football Forum
- Watersports & Diving Industry Forum

...any many more.



ISPO Shanghai 2019. Matchmaking platform.

High efficiency matchmaking with quiet meeting rooms and upfront / onsite appointment

29 e-commerce companies, department stores, sports/outdoor retailers, product managers and designers.

Choose from your buyers' wish list (excerpt):

E-Commerce:

alibaba group 1688, SANFO, Dangdang, Netease Kaola, 7jia2, amazon global selling, etc.

Department stores:

Bailan Group, Wushang, SKP Beijing, New Yansha Mall, etc.

Sports/Outdoor retailers:

SANFO, InterSports, SportsBox, etc.

Product managers and designers:

ANTA, BESTSELLER, Regatta, etc



三夫户外



View full list on: www.ispo.com/en/shanghai/exhibitors/exhibitor-services/e-commerce-matchmaking-program

ISPO and Tmall join forces for your success.

Tmall is the world's largest e-commerce marketplace and part of the Alibaba Group.

The partnership between ISPO and Tmall gives you the opportunity to...

Meet Tmall representatives to discuss business opportunities.

Open a Tmall flagship store quicker and easier than your competition.

Participate in live stream events to reach millions of consumers.



ISPO x Tmall Urban Fashion Show

The strategic cooperation between ISPO and Tmall further deepened and jointly launched the ISPO X Tmall Fashion Show during ISPO Shanghai. **Columbia, EDCO, Fjällräven, Jack Wolfskin, Kailas, Kolon, Lafuma, Phenix, Salomon, Suunto**: these 10 renowned brands displayed their newest collections at the ISPO and T-Mall fashion show. Not only the on-site visitors could join the show. It was also available for on-line visitors through the live broadcasting on the ISPO x T-Mall flagship store. The 2-days live broadcasting attracted 340,000 views and gained 4.3 million thumbs up.



TMALL & ISPO - Live Broadcasting.



66666666666666666666
登山人2011 阿迪喜欢啊
alice106373066 喜欢阿迪
登山人2011 科技发展前景
登山人2011 帅哥, 美女。

跟主播聊点什么?

Comments of the audience

Audience can find the link of the product and purchase directly online

Functions like: share to friends / send gifts / send likes



Market Introduction Program for China.

The MIP is a specific two-day seminar that makes it easier for newcomers to understand and enter the Chinese market.

The seminar takes place next to ISPO Beijing and ISPO Shanghai, and answers the most important questions about your business success in the Chinese sports market:

- ***How can I evaluate the realistic market potential of my products and my company?***
- ***How can I prepare my business for the specific conditions and needs of the Chinese market?***
- ***How can I find reliable long-term partners?***

Next edition:
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Tier cities: a national classification system.

1st Tier	2nd Tier	3rd Tier	4th Tier
The Big 4: <ul style="list-style-type: none">• Beijing• Shanghai• Guangzhou• Shenzhen	Capitals of the provinces / coastal cities: <ul style="list-style-type: none">• Tianjin• Chongqing• Chengdu• Wuhan• Xiamen	Medium sized cities of each province: <ul style="list-style-type: none">• Liuzhou• Chanzhou• Weifang• ...	Majority of urban cities: <p>Most of them are located in the Chinese back country.</p>