

SPORT MARKET OBSERVATORY

WSE SPORT MARKET ANALYSIS



PRESENTAZIONE DEL PROGETTO



SPORT MARKET ANALYSIS

**Monitor – Mapping
The Sport Market**

- **Per product category sell-in Market analysis.**
Sales done via national legal entities
B2B data analysis.
- **Per geographics areas sell-in Market analysis.**
Sales repositioned by geographic regions.

AZIENDE PARTECIPANTI AD OGGI ALLO "SPORT MARKET OBESERVATORY"

17 RAGIONI SOCIALI - 30 BRANDS



DATA ANALYSIS ARCHITECTURE BY PHASES

Sell-in analysis by internal data collection:



- **WHAT**
 - What product category / channel are involved.
- **WHEN**
 - When to collect the data and about what period.
- **HOW**
 - How to collect the data and how to use them.
- **WHO**
 - Who do what, Who is the data owner.



DATA ANALYSIS ARCHITECTURE – MID/LONG TERM VIEW



DATA ANALYSIS ARCHITECTURE – MID/LONG TERM VIEW

SPORTS

JR UNI W

ALPIN SKI	NORDIC SKI	B.T.TOURING	SNOWBOARD	T. RUNNING	RUNNING	OUTDOOR	SPORTW STYLE
SKI	SKI	SKI	SKI	APPAREL	APPAREL	APPAREL	APPAREL
BOOT	BOOT	BOOT	BOOT	FOOTWEAR	FOOTWEAR	FOOTWEAR	FOOTWEAR
BINDING	BINDING	BINDING	BINDING	GEAR	GEAR	GEAR	GEAR
HELMET	POLES	HELMET	HELMET	EYEWEAR	EYEWEAR	EYEWEAR	EYEWEAR
GOGGELS	APPAREL	GOGGELS	GOGGELS				
PROTECTION	GEAR	PROTECTION	PROTECTION				
POLES	EYEWEAR	POLES	APPAREL				
APPAREL		APPAREL	GEAR				
GEAR		GEAR					

Legenda:

SKI : Phase 1

FOOTWEAR : Phase 2 (Softgoods opening)



SELL IN ANALYSIS – PRODUCTS AND SPORTS INVOLVED

PRODUCT PER SPORT

ALPINE SKI	SKI	BINDING	BOOT
NORDIC SKI	SKI	BINDING	BOOT
BACK COUNTRY TOURING	SKI	BINDING	BOOT
ACCESSORIES	HELMET	GOGGLES	

DISTRIBUTION

RETAIL + RENTAL GEO-AREA Per provincia Sell-in done via all sport legal entities - physical & on-line

Data are not including own retail sales.

Data need to be strictly divided by categories: as example ski and binding are not together.



DATA ANALYSIS ARCHITECTURE

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- **WHEN**
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- Who do what, Who is the data owner.



DATA ANALYSIS ARCHITECTURE

SELL-IN ANALYSIS TIMELINE

YEAR 2023									YEAR 2024		
Q2			Q3			Q4			Q1		
P4	P5	P6	P7	P8	P9	P10	P11	P12	P1	P2	P3
APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DIC	JAN	FEB	MAR



FALL WINTER

- Brand sales data collection: 1 per year (april)
- Data reference period: season (divided by quarter)



DATA ANALYSIS ARCHITECTURE

SELL-IN ANALYSIS TIMELINE

APRIL 2024: ANALYSIS OUTPUT OF Q2, Q3, Q4 2023 AND Q1 2024

SPRING SUMMER

FALL WINTER

- Brand sales data collection: 1 per year (april)
- Data reference period: season (divided by quarter)



DATA ANALYSIS ARCHITECTURE BY PHASES

Sell-in analysis by internal data collection:



- **WHAT**
- What product category / channel are involved.



- **WHEN**
- When to collect the data and about what period.



- **HOW**
- How to collect the data and how to use them.

- **WHO**
- Who do what, Who is the data owner.



HOW TO COLLECT THE DATA AND HOW TO USE THEM

- **Per product category Market analysis via xls files (example available)**
- **Per geographics areas Market analysis via xls files (example available)**
- **Data collection done anonymous by uploading data into the Assosport dedicated portal.**
- **Data elaboration done by Assosport (no external market research company / business schools / university are involved)**



PRODCUT CATEGORY DATA ANALYSIS – xls example

Calendar Year	2023	2023	2024	2024
Quarter	Q4	Q4	Q1	Q1
	Total Quantity	Total Value	Total Quantity	Total Value
Order to cash Product hierarchy		EUR		EUR
[-] Alpine	20	2.200	20	2.200
Alpine Skis	5	1.000	5	1.000
Alpine Binding	5	350	5	350
Alpine Boots	5	750	5	750

Categorie →

↑
Quantità

↑
Valore



GEOGRAPHICS PRODCUT DATA ANALYSIS – xls example

Q4 2023

Categoria Prodotto →

L'OUTPUT VERRA'
FORNITO PER
REGIONE E PROVINCIA

ALPINE BOOTS	Sum of Total Quantity	Sum of Total Value
Campania	14	4.082
Emilia-Romagna	50	9.998
Friuli-Venezia Giulia	40	9.835
Lazio	9	1.762
Lombardia	132	13.579
Marche	6	1.064
Molise	1	236
Piemonte	244	46.503
Puglia	1	539
Trentino-Alto Adige	176	21.716
Valle d'Aosta	91	17.877
Veneto	132	42.342
Grand Total	1700	279.041

↑
Quantità

↑
Valore



PRODCUT DATA ANALYSIS – TO TAKE IN CONSIDERATION

ALPINE SKI AND ALPINE BINDING NEED TO BE SEPARATE

ALPINE SKI/BINDING/BOOTS AND BCT SKIS/BINDING/BOOTS ARE DEFINED BY THE BRAND (CONSUMER CENTRIC VIEW)

HOW TO COMMUNICATE ANONYMOUSLY

HOW TO REMOVE PERSONAL INFO FROM XLS FILES

STEP 1 - SAVE THE XLS FILE

STEP 2 - CLICK TO «**INFO**» ON THE XLS FILE

STEP 3 – CLICK TO «**CHECK OF ISSUE** » INSPECT WORKBOOK SESSION AVAILABLE INTO THE XLS FILE

STEP 4 – CLICK TO «**INSPECT DOCUMENT**» CHECK THE WORKBOOK FOR HIDDEN PROPERTIES OR PERSONAL INFO

STEP 5 – CLICK THE '**REMOVE ALL**' IN 'DOCUMENT PROPERTIES AND PERSONAL INFORMATION' SECTION



HOW TO UPLOAD THE XLS FILE

ASSOSPORT



SPORT MARKET OBSERVATORY

Lo **SPORT MARKET OBSERVATORY** è un progetto di Assosport che mira a raccogliere e analizzare i dati di "sell in" sul mercato degli sport invernali in Italia, per categoria di prodotto e per area geografica.

Fin dalla prima raccolta, avviata nel 2022, si è scelto di partire con alcune discipline e con alcune categorie di prodotti. Quando l'osservatorio sarà consolidato, si potrà potenzialmente allargarlo ad altre discipline e ad altre categorie merceologiche.

DISCIPLINE SPORTIVE ANALIZZATE: SCI ALPINO, SCI NORDICO, BACKCOUNTRY TOURING.

CATEGORIE MERCEOLOGICHE ANALIZZATE: SCI, SCARPONI, ATTACCHI, CASCHI, MASCHERE, PROTEZIONI.

I dati raccolti da Assosport in modo anonimo saranno accessibili esclusivamente alle aziende aderenti al progetto.

Tutti i dettagli nella presentazione qui sotto.

SPORT MARKET OBSERVATORY WSE SPORT MARKET ANALYSIS



Presentazione progetto



SPORT MARKET ANALYSIS

ISTRUZIONI PER IL CARICAMENTO DEI FILE

Nelle linee guida troverete tutte le indicazioni per predisporre, compilare ed inviare il file contenente i vostri dati statistici.

SPORT MARKET OBSERVATORY WSE SPORT MARKET ANALYSIS



Linee guida per la compilazione del file excel



Il caricamento dei file può essere fatto dal 01/04/2024 al 30/04/2024.

VEDI IL FOGLIO EXCEL AD ESEMPIO

Foglio XLS esempio



Allega qui il Foglio Excel compilato

Sfogli... Nessun file selezionato.

UPLOAD

Upload XLS



Per maggiori informazioni, gli uffici di Assosport sono a completa disposizione
ref. Marisa Bosa, Monica Piovesan | assosport@assosport.it | T. 041-2517567



HOW TO COMMUNICATE ANONYMOUSLY

BUONGIORNO

PER CORTESIA CANCELLATE IL

FILE: [AABBCC.XLS](#)

PROCEDIAMO CON UN NUOVO
UPDATE.

GRAZIE

EXAMPLE

ISTRUZIONI PER IL CARICAMENTO DEI FILE

Nelle linee guida troverete tutte le indicazioni per predisporre, compilare ed inviare il file contenente i vostri dati statistici.



Il caricamento dei dei file può essere fatto dal 01/04/2024 al 30/04/2024.

VEDI IL FOGLIO EXCEL AD ESEMPIO

Allega qui il Foglio Excel compilato

Sfogla... Nessun file selezionato.

UPLOAD

← Dove caricare il messaggio

Per maggiori informazioni, gli uffici di Assosport sono a completa disposizione
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DATA ANALYSIS TIMING

CARICAMENTO FOGLI XLS

DAL 01/04/24 AL 30/04/24

PORTALE CARICAMENTO DATI ASSOSPORT



DATA ANALYSIS – QUESTIONS & ANSWERS

DOMANDE ED EVENTUALI CHIARIMENTI
DURANTE LA RACCOLTA DEI DATI

assosport@assosport.it

Referente: Marisa Bosa



DATA ANALYSIS ARCHITECTURE BY PHASES

Sell-in analysis by internal data collection:

- **OUTPUT**
- Output example by categories and geo distribution.
- Data will be available in xls files tabs, graphics.
- The Output will be available only for the Brands involved into the research.
- The Output can not be shared with another Brands and/or companies.
- The Output is not open to be share externally (press-pr).
- The Output can not be used for Brand adverting or communication.



DEMO TEST

ASSOSPORT
ASSOCIAZIONE NAZIONALE
FRA I PRODUTTORI DI ARTICOLI SPORTIVI

SPORT MARKET ANALYSIS TEST PHASE

DATA ANALYSIS ARCHITECTURE BY PHASES // TEST PHASE

TEST BRAND

ROSSIGNOL / NORDICA / HEAD / DALBELLO / ATOMIC

ROSSIGNOL NORDICA HEAD DALBELLO ATOMIC

SPORT MARKET ANALYSIS **TEST PHASE** ASSOSPORT ASSOCIAZIONE NAZIONALE FRA I PRODUTTORI DI ARTICOLI SPORTIVI

DATA ANALYSIS ARCHITECTURE BY PHASES // TEST PHASE

TEST PHASE

All sport categories

T.RUNNING RUNNING OUTDOOR **ALPIN SKI** NORDIC SKI SNOWBOARD B.C.TOURING S.STYLE

TEST PHASE

SPORT MARKET ANALYSIS **TEST PHASE** ASSOSPORT ASSOCIAZIONE NAZIONALE FRA I PRODUTTORI DI ARTICOLI SPORTIVI

DATA ANALYSIS ARCHITECTURE BY PHASES // TEST PHASE

TEST SELL-IN ANALYSIS TIMELINE

NOVEMBER 2021 FEBRUARY 2022

HY2						HY1					
Q3			Q4			Q1			Q2		
P7	P8	P9	P10	P11	P12	P1	P2	P3	P4	P5	P6
JUL	AUG	SEP	OCT	NOV	DIC	JAN	FEB	MAR	APR	MAY	JUN

1 MONTH 1 MONTH ANALYSIS OUTPUT

• TEST PHASE: Brand sales data collection for only 1 month in 2021 and 1 month in 2022

SPORT MARKET ANALYSIS **TEST PHASE** ASSOSPORT ASSOCIAZIONE NAZIONALE FRA I PRODUTTORI DI ARTICOLI SPORTIVI



HOW THE OUTPUT LOOKS – PRODUCT CATEGORY ANALYSIS

Period: November 2021

Product Category: Alpine skis

Italy (all regions)

Brand	Quantità	M/S Q.tà	Valore	M/S Val
BRAND 1	2277	25%	390.523 €	22%
BRAND 2	1211	14%	268.965 €	15%
BRAND 3	1764	20%	371.548 €	21%
BRAND 4	2320	26%	437.237 €	25%
BRAND 5	1379	15%	273.027 €	16%
Totale	8951		1.741.301 €	100%

- National Total quantity and value divided per Brands by providing % market share.
- One period analysis, November 2021 – (test phase done on 2 single periods November and February).
- One category analyzed (Alpine skis)
- Five Brand involved (Test phase)



HOW THE OUTPUT LOOKS – PRODUCT CATEGORY ANALYSIS

Period: November 2021

Produc Category: Alpine skis

Italy (all regions)

Brand	Quantità	M/S Q.tà	Valore	M/S Val
BRAND 1	2277	25%	390.523 €	22%
BRAND 2	1211	14%	268.965 €	15%
BRAND 3	1764	20%	371.548 €	21%
BRAND 4	2320	26%	437.237 €	25%
BRAND 5	1379	15%	273.027 €	16%
Totale	8951		1.741.301 €	100%

Period: November 2021

Produc Category: Alpine bindings

Italy (all regions)

Brand	Quantità	M/S Q.tà	Valore	M/S Val
BRAND 1	2327	29%	114.315 €	17%
BRAND 2	142	2%	12.022 €	2%
BRAND 3	1552	20%	213.875 €	31%
BRAND 4	2705	34%	260.414 €	38%
BRAND 5	1218	15%	82.749 €	12%
Totale	7944	100%	683.375 €	

Period: November 2021

Produc Category: Alpine ski boots

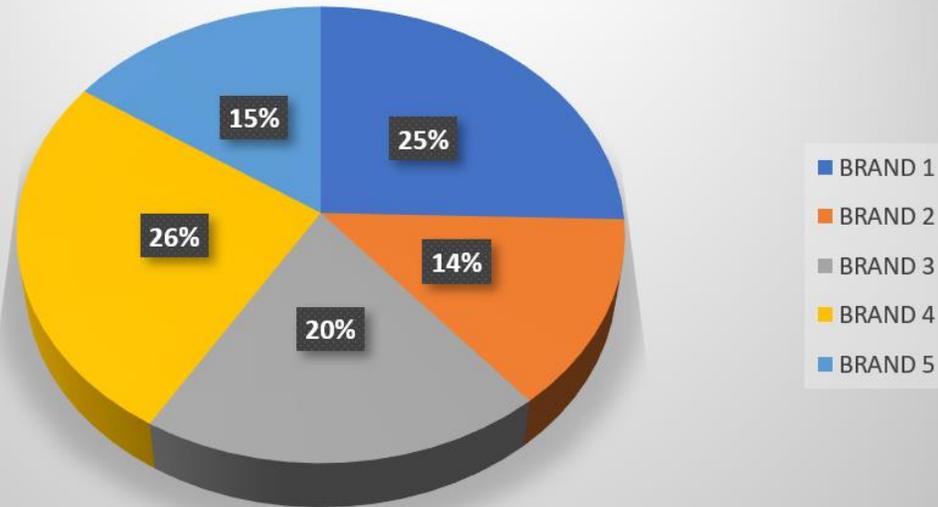
Italy (all regions)

Brand	Quantità	M/S Q.tà	Valore	M/S Val
BRAND 1	2988	28%	399.733 €	26%
BRAND 2	1892	18%	228.538 €	15%
BRAND 3	2595	24%	516.103 €	34%
BRAND 4	2084	20%	299.294 €	19%
BRAND 5	1057	10%	95.012 €	6%
Totale	10616	100%	1.538.679 €	

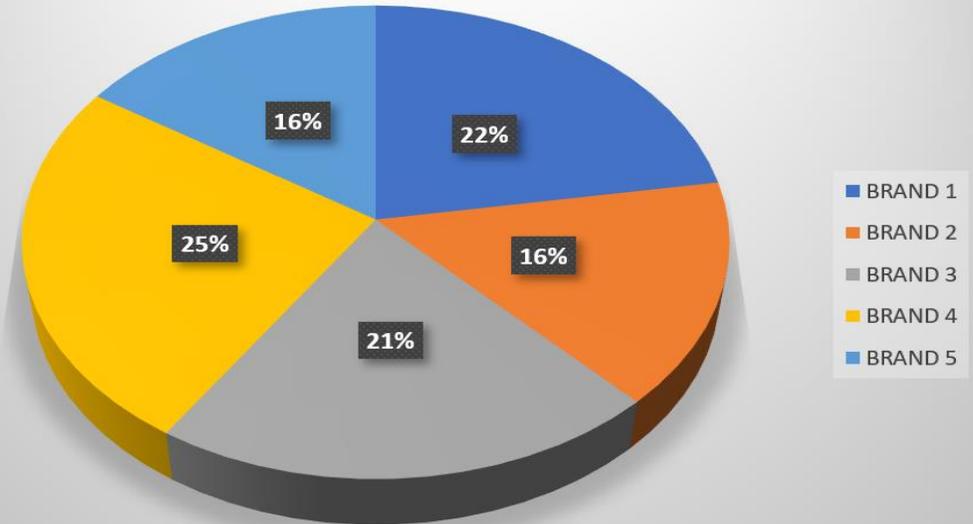
- National Total quantity and value divided per Brands by providing % market share.
- One period analysis, November 2021 - (test phase done on 2 single periods November and February).
- Three categories analysis (Alpine skis / Alpine Binding / Alpine Boots)
- Five Brand involved (Test phase)

HOW THE OUTPUT LOOKS – PRODUCT CATEGORY ANALYSIS

Alpine Ski Quantity - November 2021



Alpine Ski Value - November 2021



- Total quantity and value at national level.
- One period analysis, November 2021 – (test phase done on 2 single periods November and February).
- One product category analyzed (Alpine skis)
- Five Brand involved (Test phase)

HOW THE OUTPUT LOOKS – GEO ANALYSIS

Period: February
2022

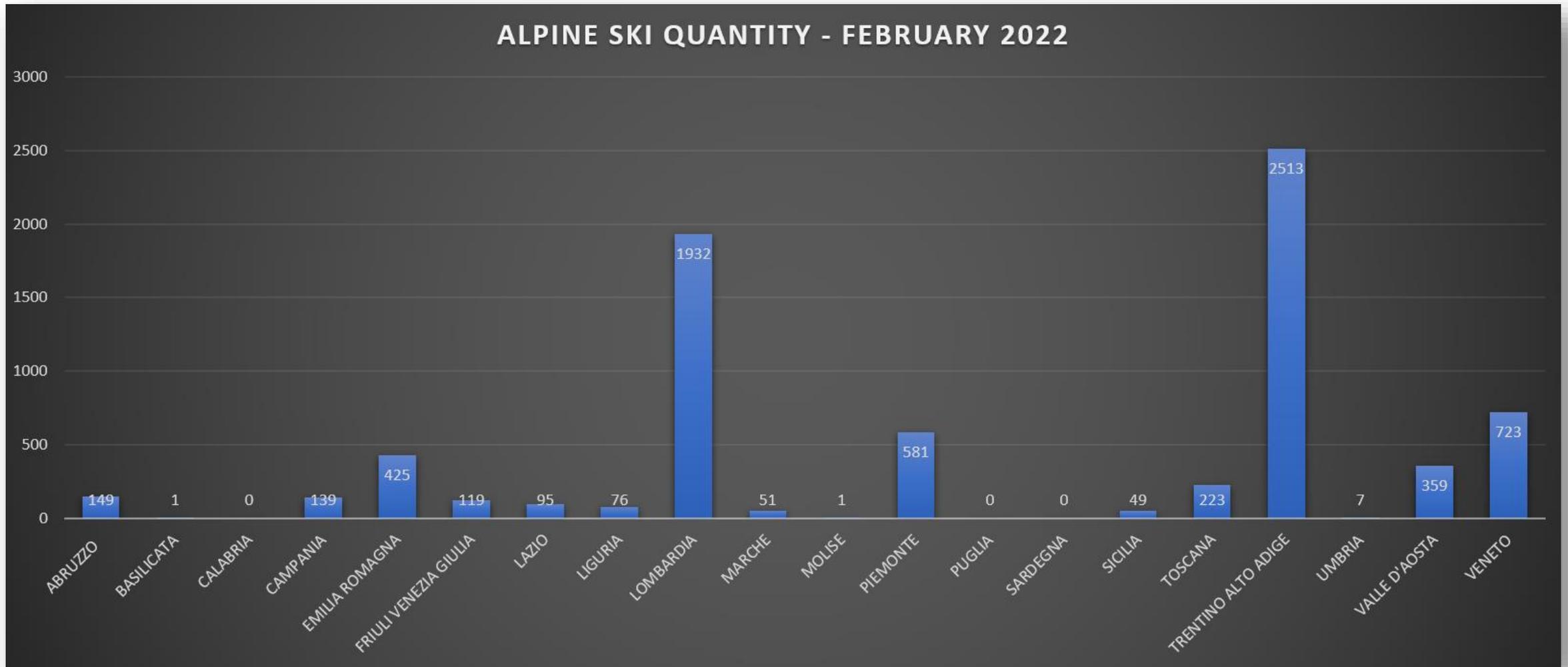
Product Category: Alpine skis

QUANTITA' PER REGIONE

	ABRUZZO	BASILICATA	CALABRIA	CAMPANIA	EMILIA ROMAGNA	FRIULI VENEZIA GIULIA	LAZIO	LIGURIA	LOMBARDIA	MARCHE	MOLISE	PIEMONTE	PUGLIA	SARDEGNA	SICILIA	TOSCANA	TRENTINO ALTO ADIGE	UMBRIA	VALLE D'AOSTA	VENETO	Totale complessivo
BRAND 1	31			67	112	41	72	56	582	28		185			23	112	498	6	61	126	2000
BRAND 2	0	0	0	2	15	14	0	0	91	0	0	9	0	0	0	5	161	1	9	322	629
BRAND 3	52			24	155	27	23	10	673	14	1	240				49	945		88	134	2435
BRAND 4	54				125	35		10	484	5		147			21	44	660		106	128	1819
BRAND 5	12	1		46	18	2			102	4		0			5	13	249		95	13	560
Totale	149	1	0	139	425	119	95	76	1932	51	1	581	0	0	49	223	2513	7	359	723	7443

- Total quantity split by brand and per single geographic area (same analysis available by value).
- Same logic apply to all the product categories.

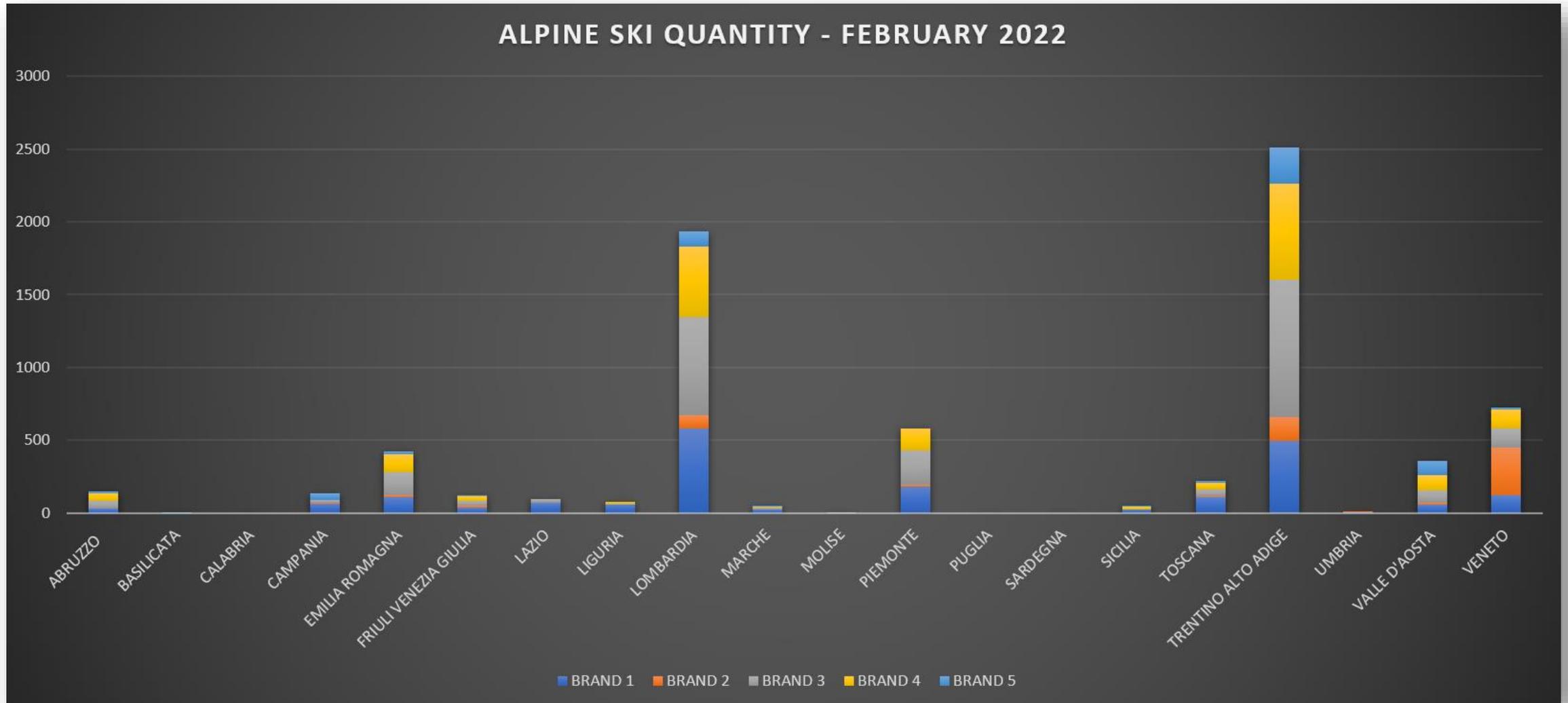
HOW THE OUTPUT LOOKS – GEO ANALYSIS



- Total quantity per single geographic area (same analysis available by value)



HOW THE OUTPUT LOOKS – GEO ANALYSIS



- Total quantity split by brand share and per single geographic area (same analysis available by value).



DATA ANALYSIS ARCHITECTURE BY PHASES

Sell-in analysis by internal data collection:

- ✓ • **WHAT**
 - What product category / channel are involved.
- ✓ • **WHEN**
 - When to collect the data and about what period.
- ✓ • **HOW**
 - How to collect the data and how to use them.
- ➔ • **WHO**
 - Who do what, Who is the data owner.



HOW TO COLLECT THE DATA AND HOW TO USE THEM.

- **Digital Platform owner is Assosport – No other entities are involved.**
- **Data are stored into the Assosport server – No external access allowed.**
- **Data owner is Assosport – No external ownership possible.**
- **Output data are available only for the Companies who take part of the market.**
- **To be part of the analysis Companies need to subscript the terms and agreements.**



HOW TO COLLECT THE DATA AND HOW TO USE THEM.

The agreement by point

- **Data can not be shared with any companies not involved into the market analysis.**
- **Data can not be shared with customers, external consultants / marketing agency.**
- **Data can not be shared with market research companies.**
- **Data can not be shared with external entities (i.e.: University – Business schools)**
- **Data can not be shared with Press – Journalists – no P.R. .**
- **Data can not be shared by social networks.**



SPORT MARKET OBSERVATORY

WSE SPORT MARKET ANALYSIS

