



# Linking Sports with Nature



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Nature is revered by the public both physically and metaphysically. National awareness for environmental protection is in place, but lacks applicable systems and social accountability. Niche markets are currently developing in various industries, with both nature and preservation as the selling point.

## Executive Summary

- Traditional Chinese views and philosophies on nature strongly impact their behavioral patterns subconsciously. Therefore, sport activities and product presentations should cater to this customer-centric feature.
- With ever-increasing size and spending power, China's middle-class consumers prefer outdoor sports activities and images intricately linked with nature. One-stop nature-friendly experiences are rising as a strong trend.
- Sportswear consumers warmly welcome tech-enabled eco-friendly materials. Fulfillment of responsibilities to nature by participating in sports often appears in social media headlines. Both dictate the adoption of a sustainable mentality in the sports industry.



# The Long History of the Chinese Mindset Towards Exercise and Nature

Chinese people's traditional mindset influences which seasons/times of the day exercising is appropriate. Sports-related habits also differ due to the understanding of nature and human body mechanisms such as when and how to hydrate after working out.

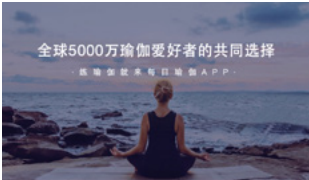
In ancient China, the sun's position in the zodiac distinguished the 24 solar terms, guiding agricultural activities. Modern Chinese believe solar terms reflect changes in climate and natural phenomena. Therefore, they adapt their sports activities accordingly. QQ Big Data released the *Chinese People's Sports Report 2016* stating the post-90s generation regarded "weather condition" as one of the major criteria for working out (2016). Recorded automatically via mobile devices, the daily step count supports the finding. Step counts in spring and autumn exceed those of summer and winter. This aligns with the implications of the 24 solar terms. Between the 11th and 12th solar terms, the Slight Heat and the Great Heat, people suggest avoiding strenuous exercises.

Humidity level and special weather phenomena on a seasonal and regional basis strongly affect people's choice of sports activities and sportswear. For instance, in the plum rain season, mostly in the south of China from May to July, the low air pressure and thin air cause non-stop sweating resulting in lower outdoor presences in general. During this time, social media posts advising how to exercise at the proper level flood timelines. Cotton sportswear or other slow-drying materials will likely go moldy and create a bad user experience. However, traditionally speaking, Chinese consumers more often buy cotton material, because they think it is more absorbent of sweat and has a more skin-friendly texture.

## Best Practices



Even now, searching the keyword “cotton sportswear” produces many results. However, as modern and international sports brands all double down on R&D of innovative materials: Nike’s Dri-Fit, Adidas’ Clima-Cool, and Reebok’s Play-Dry, the market preference is shifting and Chinese consumers are more open to new material options.



Indoor sports like yoga have unlimited potential in China with the power of “She Economy.” Based on the *2018 China’s Yoga Industry Research Report*, yoga is a market of strategic importance mounting to 40 billion RMB (iResearch, 2018). The booming of yoga apps, such as Everyday Yoga and I Love Yoga, are dominating the online market leaving yoga studios behind in less developed cities.

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### CONSIDER THE SOLAR TERMS

Chinese people have many views concerning nature and the human body that are deeply rooted and a possible niche selling point for sports brands. Chinese people tend to make their clothing choices based on the solar terms during season changes.

# Staying Close to Nature is the New Middle Class Lifestyle

The parallel growth of China's middle-class population and nature-friendly outdoor sports reveal a correlation. Niche categories show a need for further development to fit middle-class Chinese consumers' mentality and consumption habits.

According to *China Household Finance Survey (2015)*, the Chinese middle-class reached 200 million in population. The boom of outdoor activities in recent years is embodied in the explosive market growth from 0.1 billion RMB in 2000 to 19.8 billion RMB in 2018 (Chinese Outdoor Supplies Market Report, 2018). The same report revealed that the majority of travelers are aged between 21 to 40 and comprise up to 67.1% of the consumer group. Not only equipped with the most energy, the age group also suffers from a great deal of modern pressure related to work and family. For young white-collar workers with decent dispensable income and leisure time, weekend nature getaways and sweating the stress out is a popular trend.

Hiking and mountaineering are two nature-related outdoor activities introduced earlier to Chinese consumers and the vitality of this market is still strong. China Outdoor Association estimates 60 million Chinese participated in hiking and mountaineering in 2016. Meanwhile, China witnessed the rise in diversified outdoor programs recently, including skiing, surfing, diving and paragliding which provide consumers with the satisfaction of thrill-seeking, nature-loving and obtaining social-media-worthy content. In terms of frequency, once a week or 1-3 times a month are the major categories, occupying 79% of the interview samples by Asia Outdoor Trade Show (2018 Chinese Outdoor Products Market Analysis). Moreover, as revealed by the *Outdoor Sports and Holiday Industry Analysis (2015)*, the demand for adventure vacations, outdoor activities with resort-style service, will become the next profitable industry. In the survey, 37.1% of the participants revealed the major drive for participating outdoor sports is "leisure and pastime."

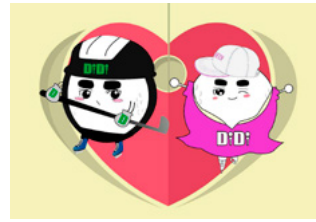
## Best Practices



**Anji Wufeng Mountain Sports Resort** was built following the blueprint of successful examples in Switzerland. Its all-rounded service includes outdoor sports, sports rehabilitation, eco-agriculture, health conservation in nature, etc., forming a one-stop vacation experience shaped by the theme of sports and nature. It is known as heaven for cycling enthusiasts with the most systematic services and facilities.



Based on the 2019 *Tmall Fishing Consumption Trends Report*, more and more young people choose fishing in the nature as a leisure activity. Hence Alibaba executed a Sports Gold Rush Fishing Competition accordingly that turned out to be a great success. **HANDING Outdoor** is a company specialized in fishing facilities and ranks as No.1 go-to on Tmall for both novice and expert fishers. Well-presented package gears and a wide range of the latest and best tools available helped it secure the role of professional fishing supplier.



**Didi Sports Butler** is an app-centered service provider primarily focused on elite golf services for China's middle class and their children. It lowered the threshold and increased the convenience compared to the traditional exclusive club format. It also includes other nature-friendly sports such as equestrianism and go-karts.

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### CHINA'S BOOMING MIDDLE-CLASS DEMANDS DISTINCTIVE CHOICES, AND NATURE-EMBRACING NICHE SPORTS IS THE ANSWER.

Resort-style sports tourism towns need to have the following features: industrial chains centering on a single knockout sports activity, comprehensive facilities, and a smart management mechanism (preferably with tailored apps that enable every digital service). The market for stress-relieving and status-matching sports related to nature has a huge potential considering Chinese middle class' strong spending power and mental need.

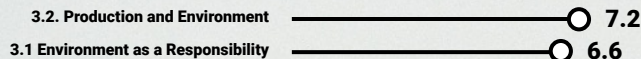
# Sustainable Awareness Shaped by Government Policies and Sophisticated Customers

Rapid economic development caused deeper thinking about nature preservation and sustainability on a government and individual level. This trend can be shown by the social media posts centering on the consumer value “Nature.” Of the posts, 7.2% talked about “production and environment” and 6.6% expressed “environment as a responsibility.” The sports industry is starting to demand an eco-friendly mindset in terms of national plans and relevant consumptions creating a huge marketing potential.

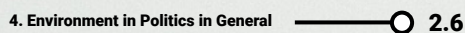
## ① VALUE NATURE: DETAILED CONTENT OF POSTS

The most important figurative meaning is how the social, environment influences the development of humans, followed by the nature of gender roles and what is considered typically male or female. The most important topic on environmental protection is the responsibility of mankind and its economical activities for the physical environment.

### Environmental protection



### Environment in politics



### Figurative meanings



Unit: Percent

Source: Chinese Consumer Value Index 2019 (Trendbüro, 2019)

In the past two decades, Chinese people’s understanding and attitude towards nature changed drastically. National policies borrowed from other countries’ abundant experiences such as Japan supporting the reinforcement of trash recycling. For the 2020 Olympic Winter Games, Beijing will reuse eight venues from 2008 Olympics, including the Water Cube for Curling competitions, the National Indoor Stadium for Ice Hockey events and the Bird’s Nest for both Opening and Closing Ceremonies. Besides, with the help of the State Grid Corporation of China, all 2020 Olympics venues will be powered by green electricity from its partner city Zhangjiakou.

On the customers' side, citizens especially in developed cities are more susceptible to international influences and take on a stronger social responsibility. In the *China New Generation Fashion Consumption Whitepaper 2018* published by digital business media Luxe.CO, 80.4% of the respondents believe social responsibility will influence their purchase decision. In the context of the sports industry, Chinese consumers prefer sports brands that utilize sustainable, recyclable materials and sports activities that seek co-existence with the natural environment. Sports brands correspondingly have started to take initiatives of environmental protection, as part of their communication strategies at the “social responsibility” level. Puma announced their goal of realizing 90% sustainable material production by 2020.

## Best Practices



In September 2019, **ANTA** initiated its new eco-friendly series, using on average 11 plastic bottles for each polyester shirt. The production volume in the whole third season collected 7.7 million bottles in total. It not only lowered the cost from 30% to 50% compared to international brands through technical innovation but also gained customer trust by attaching “tech-evoking eco-friendly” labels for better recognition.



As young Chinese consumers' desire to look chic and modern during sports grows, street-fashion clothing brands are enthusiastically chased after by street sports lovers such as skateboarding, BMX, and Parkour. **TIANC** by Chinese actor, Chenhe is one of the successful cases that also catered to the environmental-protection mentality of young followers. Messages are delivered via graffiti designs and social media marketing content on platforms such as Du (Poison).



PADI, together with Project Aware, Better Blue, and many other organizations launched a “Diving for Cleaning Event” on World Oceans Day in 2018, collecting more than 1000 kg of ocean trash. A trend has since been ignited for diver communities to organize this kind of event regularly across China, enabling participants to enjoy the sense of achievement while diving.

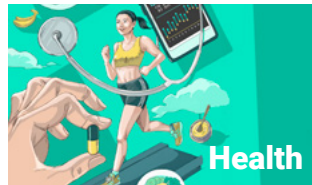
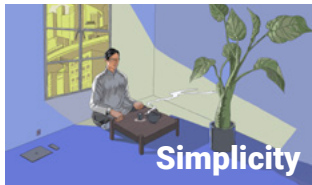
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**THE MARKET OF INTEGRATING NATURE ELEMENTS INTO SPORTS BRANDS AND ACTIVITIES HAS A LONG WAY TO GO; TECHNOLOGY UPGRADE AND OFFLINE INITIATIVES ARE TWO MAJOR WAYS OF BUILDING THE RESPONSIBLE ENTERPRISE IMAGE.**

Investing in material technology and adjusting manufacturing procedures might seem costly at the moment, but only those who start early will not be washed out of the market as consumers become more socially and environmentally aware and sensitive.



# Six More Chinese Values that are Relevant for Your Business in China.



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The 7-part whitepaper series *Chinese Sports Consumer Values* builds on Trendbüro's *Chinese Consumer Value Index 2019* – the first-ever quantitative and qualitative analysis of Chinese consumer values, based on 7.7 million user-generated posts from Sina Weibo and WeChat. An international team of researchers applied the CCVI's findings to the Chinese sports and outdoor industry, complete with best practice examples and business implications.

**Pictures:** The images shown are pictures from companies were selected as best practices, otherwise sketch illustrations were created to underline the context of the values.