



COVID-19 Industry Impact Report

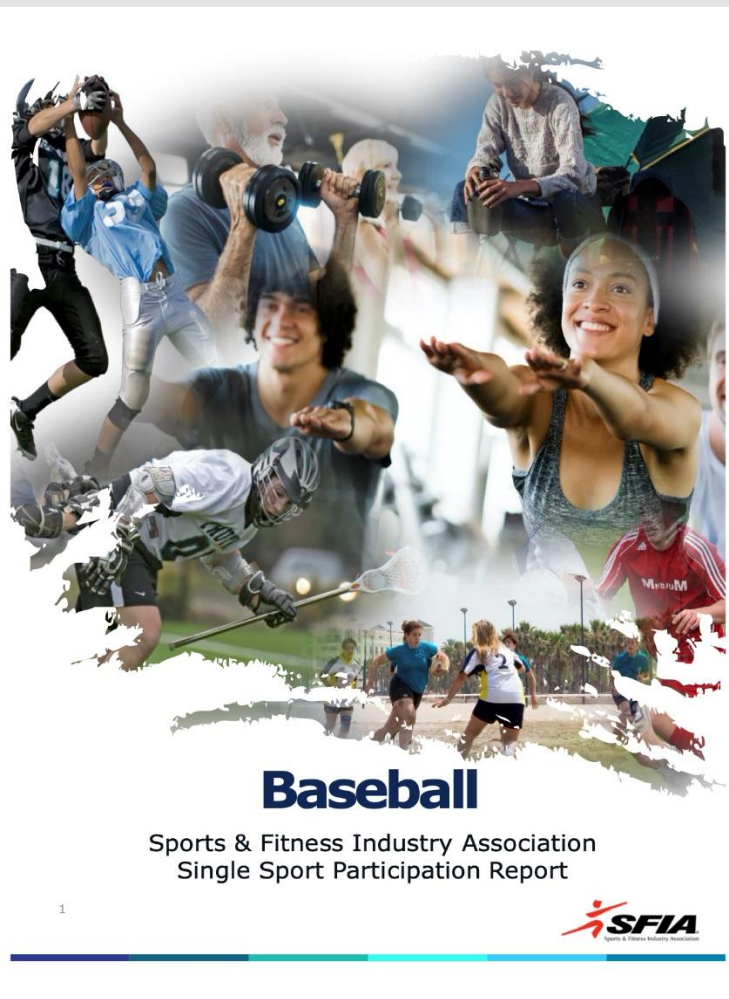
May 2020 Results







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COVID-19 Industry Survey Results

Introduction:

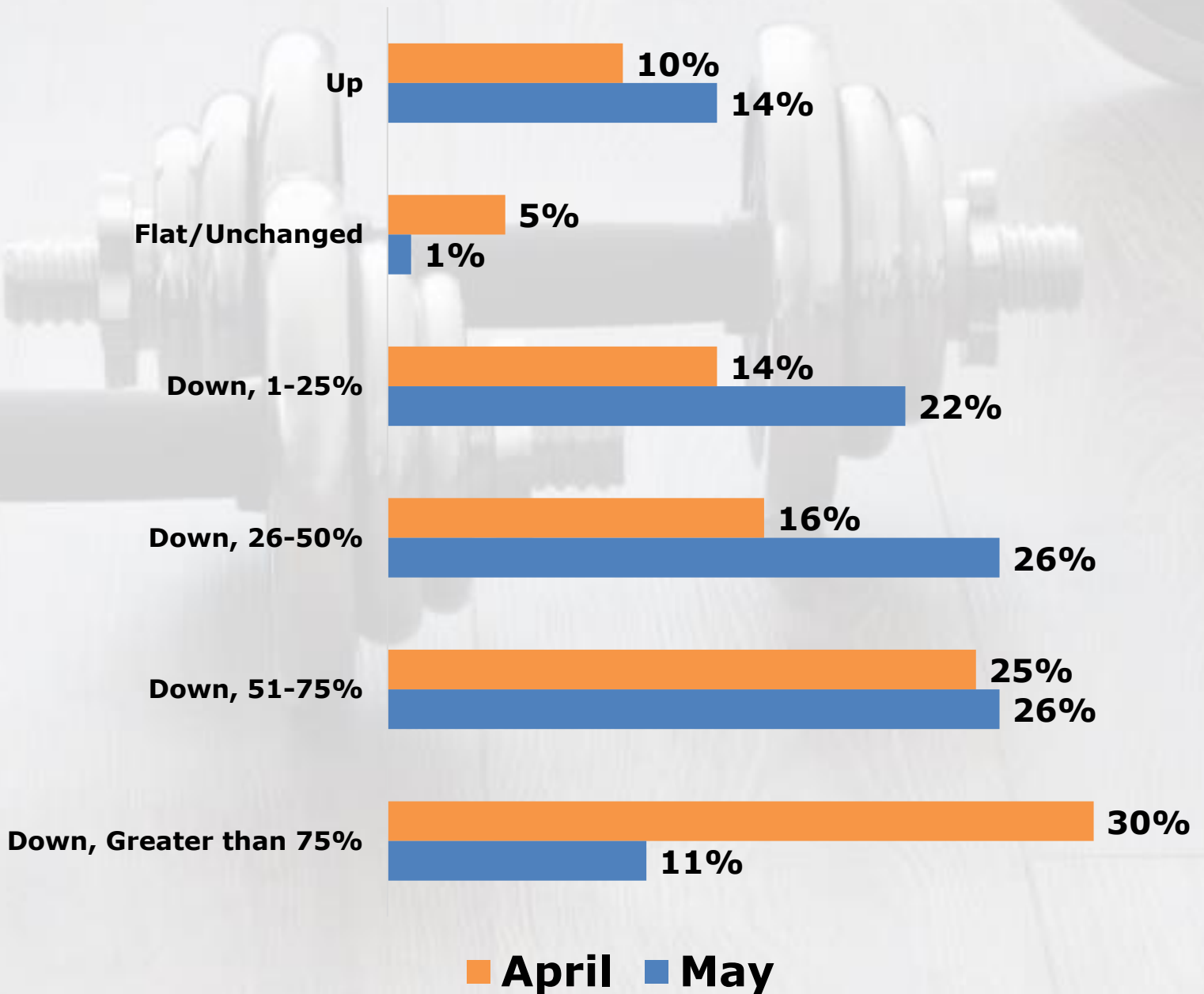
The Sports & Fitness Industry Association (SFIA) surveyed its membership to understand the effects the COVID-19 pandemic is having on the sports and fitness industry. The following insights contained in the report are intended to provide a snapshot of key business questions. We hope that this report assists industry stakeholders in decision making and provides new insights for them to consider.

This is the second edition of SFIA's COVID-19 Industry Impact survey series. We are committed to continuing to gather insights to help our industry get through this period of uncertainty.

Key Findings:

- Industry performance improving slightly. May showed positive movement as 56% of companies reported an increase in sales for May 2020 when compared to April 2020.
- Digital is key focus, even in a COVID-19 environment. Though many companies continue measures to conserve cash, 60% of industry respondents reported increased investment in their digital presence, with over half stating that they have increased investment in their own website.
- E-Commerce represents opportunity. 51% of brands reported their May 2020 e-commerce sales were higher than in May 2019.
- Domestic supply chains are relatively clean and disruptions are easing. Fulfillment and distribution centers experienced less delays in May when compared to April. Notably, 55% of companies reported no delays in May whereas 32% reported no delays in April.
- Return to Physical Activity and Sports picking up. 76% of respondents think that gyms, health clubs and boutique fitness centers will return in the summer, while for youth sports, 80% believe that organized youth sports will return by September or October.
- Long way to go. When asked when they expect company sales will return to “some semblance of pre-COVID levels,” a majority of sports and fitness companies (60%) project 2021 or later.

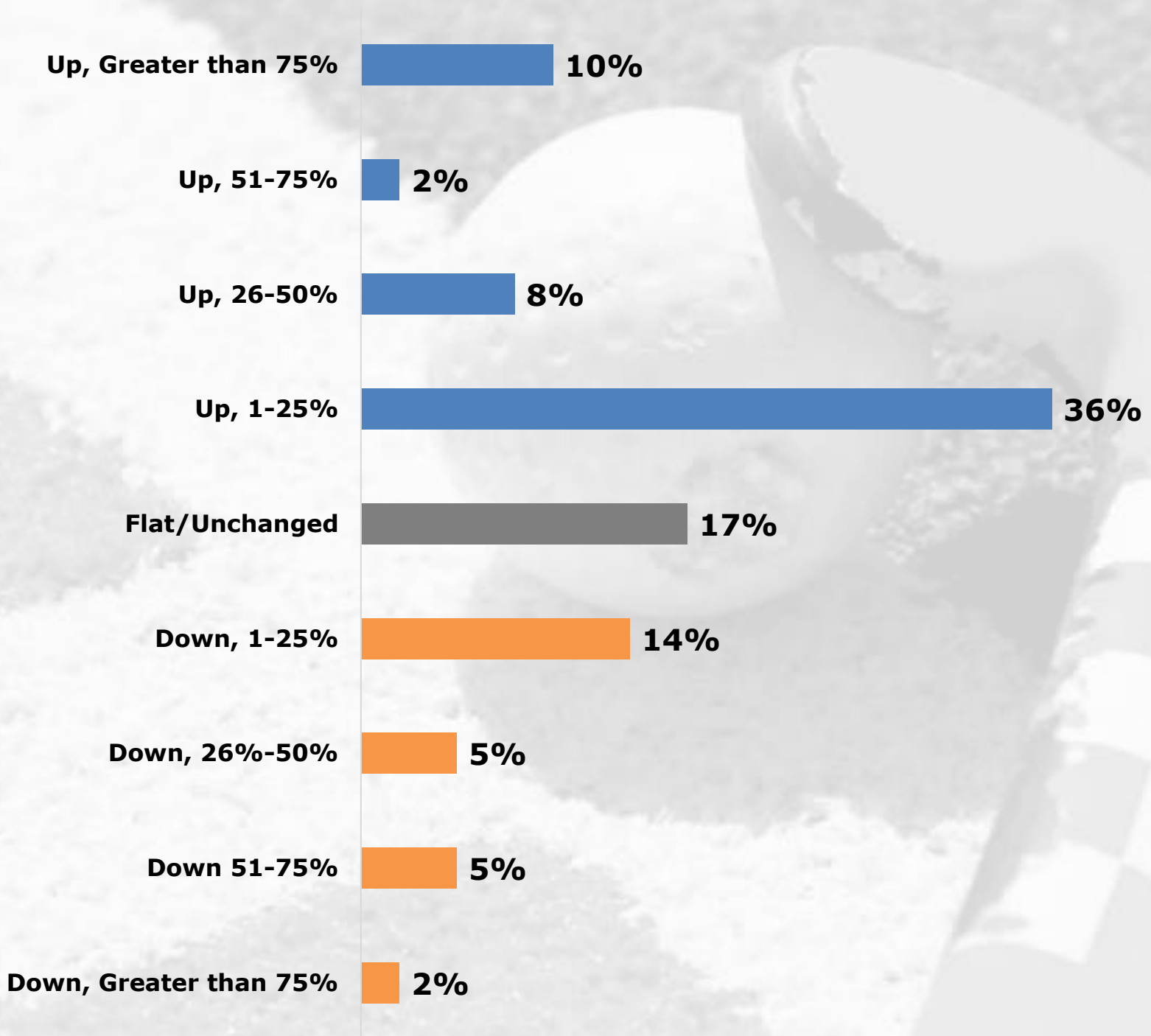
How do your May 2020 overall sales compare to May 2019?



*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories that reported sales data.

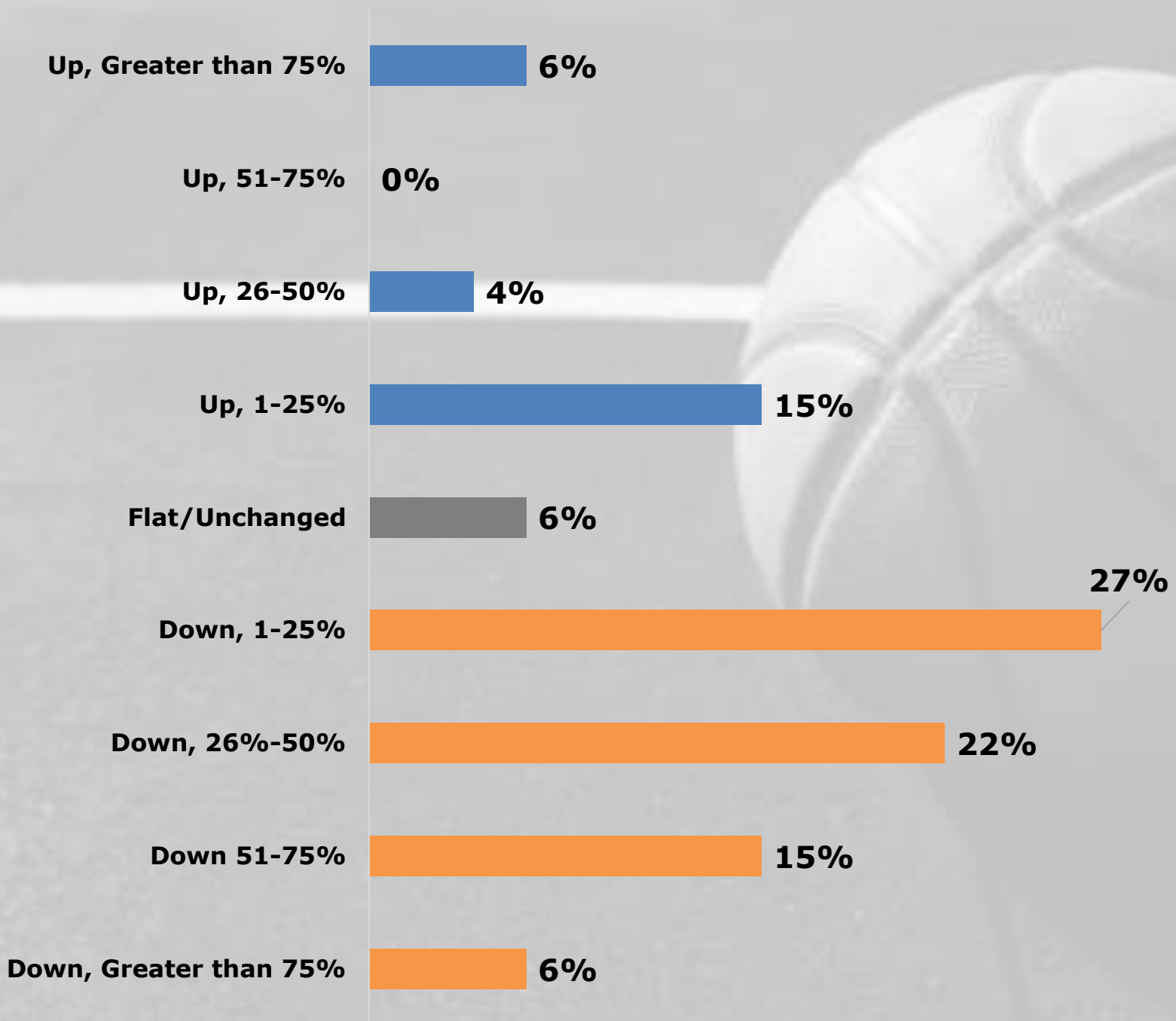
** The April data referenced in this chart is taken from the question "How do your April 2020 overall sales compare to April 2019?" in the April survey results.

How do your May 2020 sales compare to April 2020?



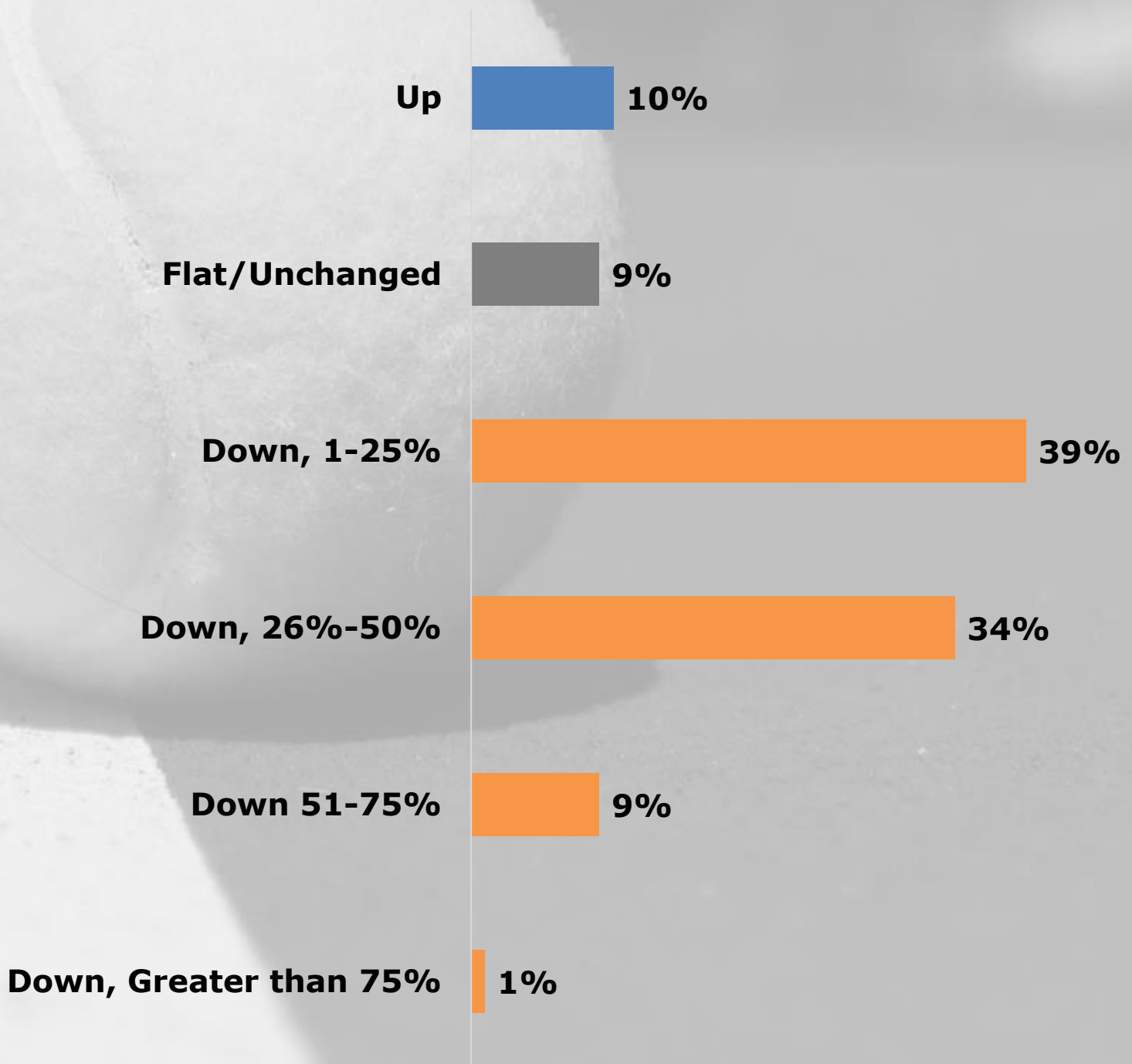
*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories that reported sales data.

How are you projecting your June 2020 sales compared to June 2019?



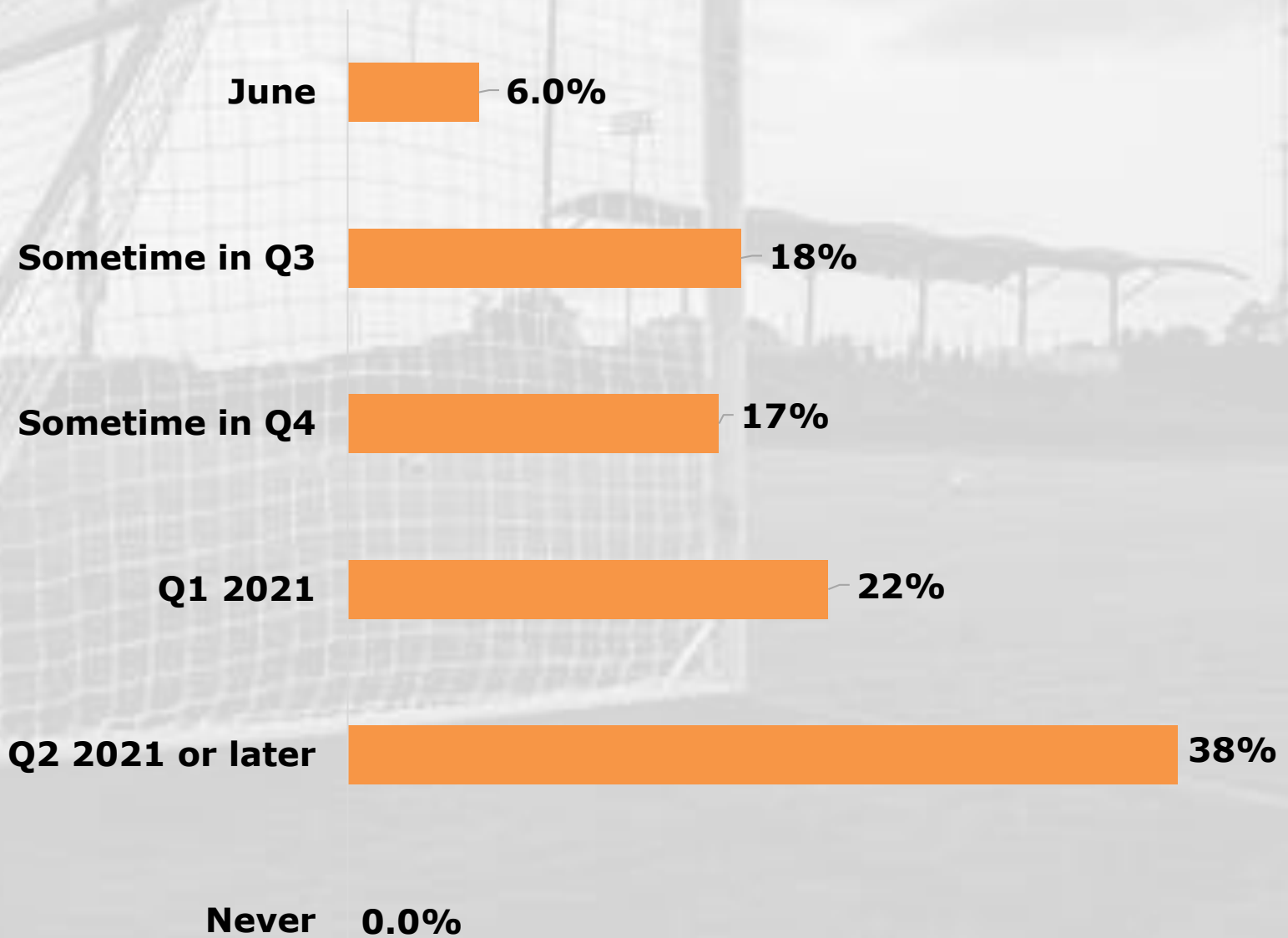
*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories that reported sales data.

How are you projecting your fiscal year 2020 sales compared to 2019?



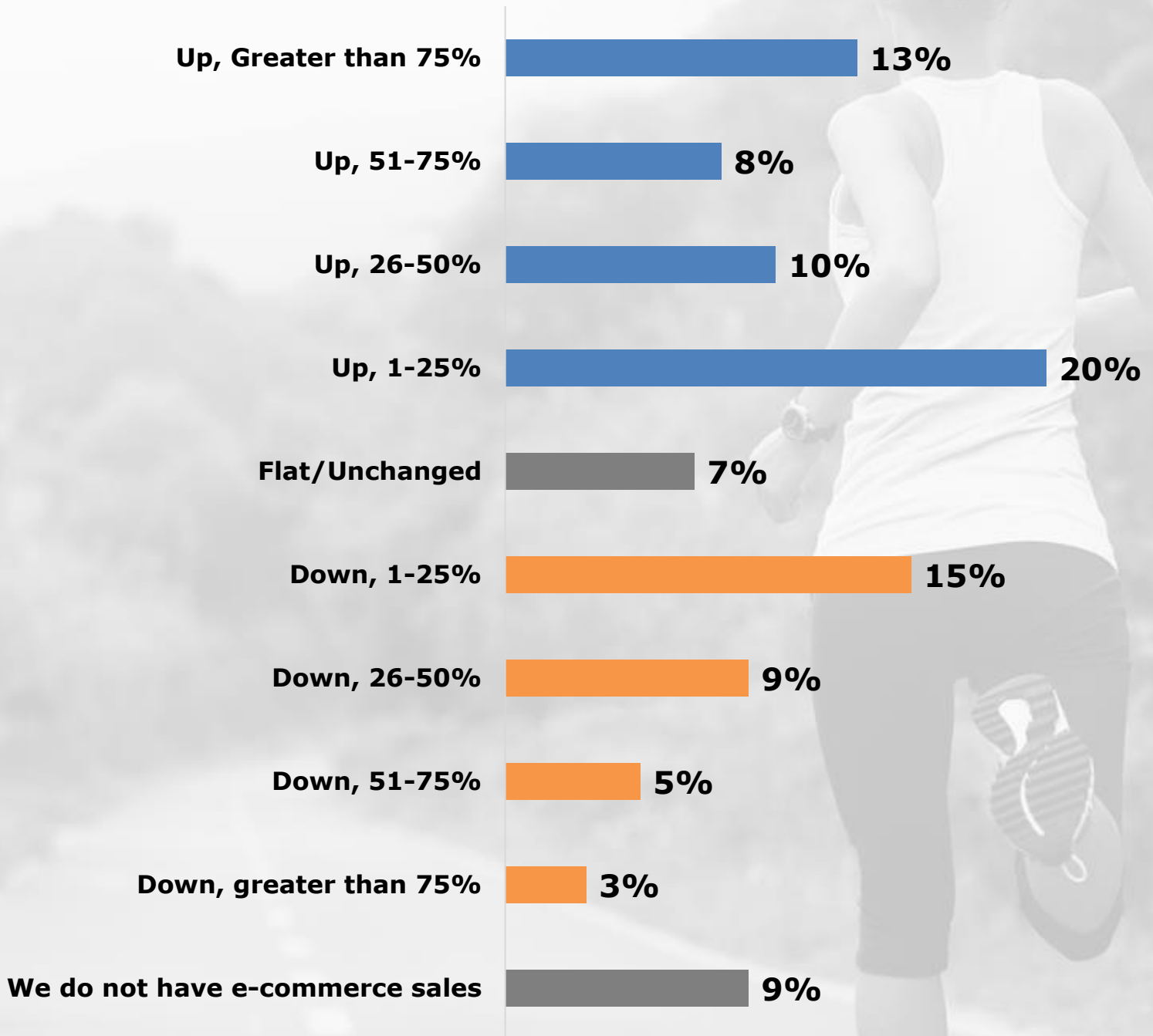
*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories that reported sales data.

Given the current business climate, when do you anticipate that sales will resume to some semblance of pre-COVID-19 projections?



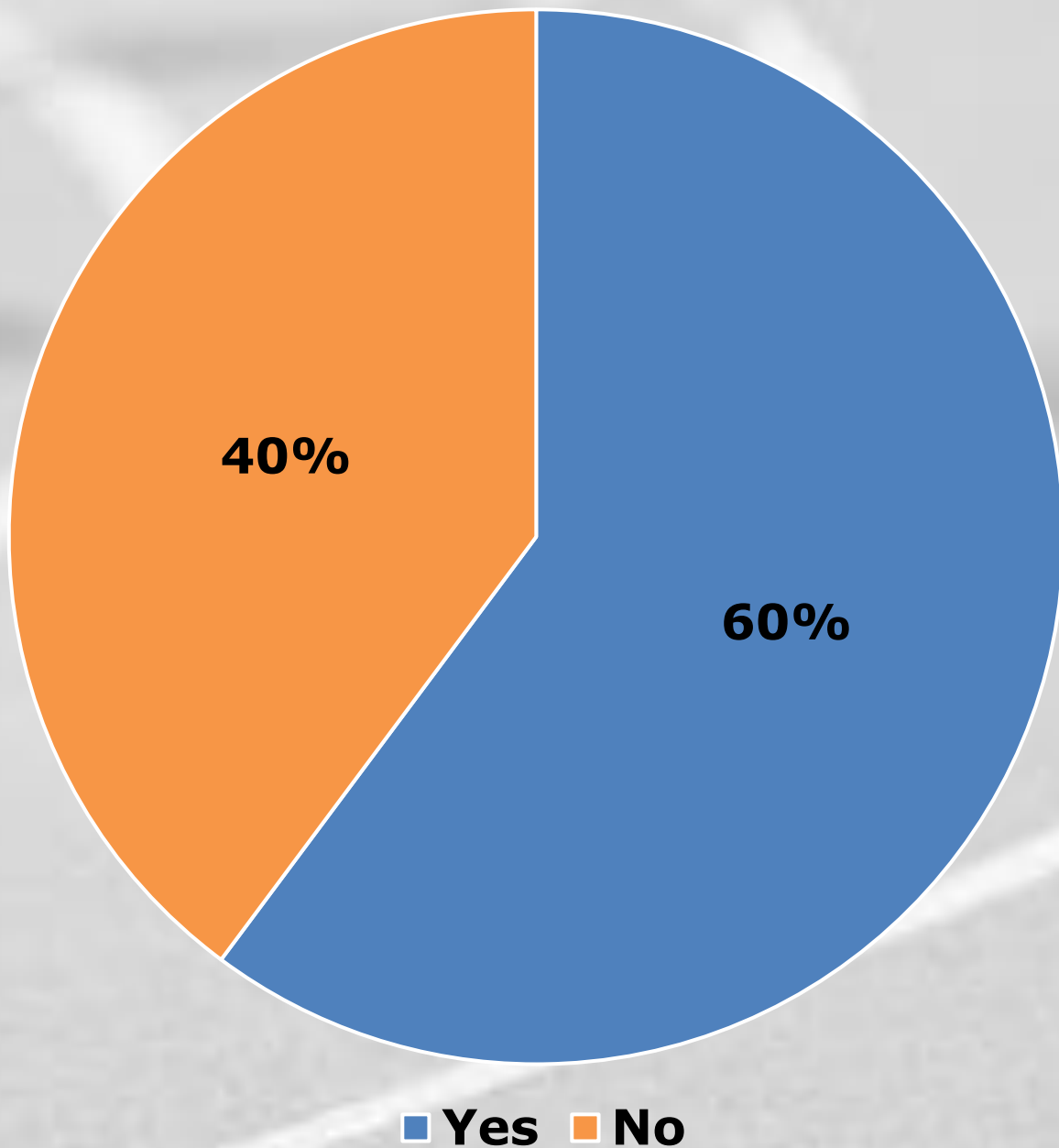
*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories that reported sales data.

How do your May 2020 e-commerce sales compare to May 2019?



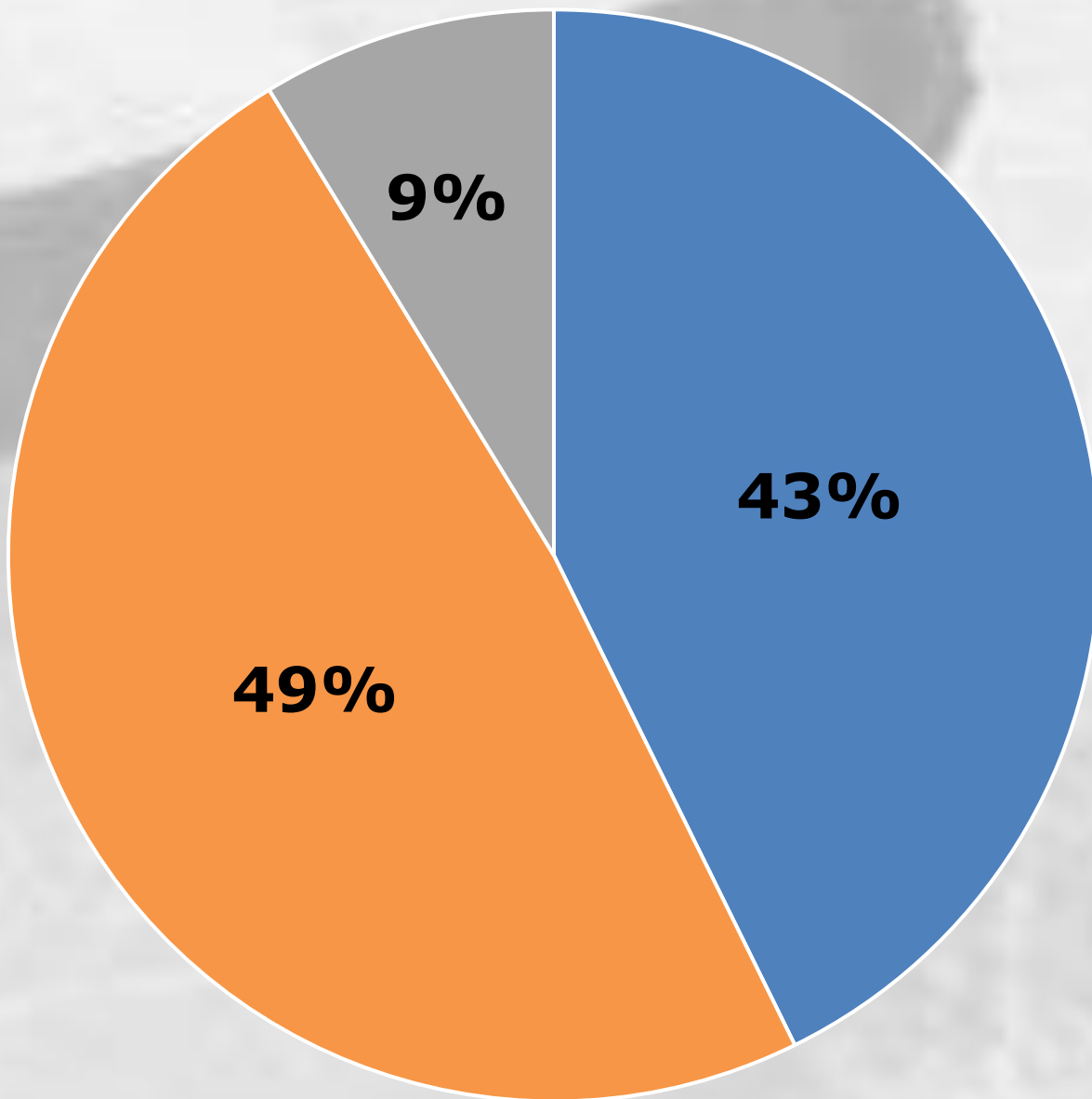
*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories that reported the sale of a physical product.

Since the COVID-19 pandemic began, are you investing more into your digital presence?



*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories that reported having a digital presence.

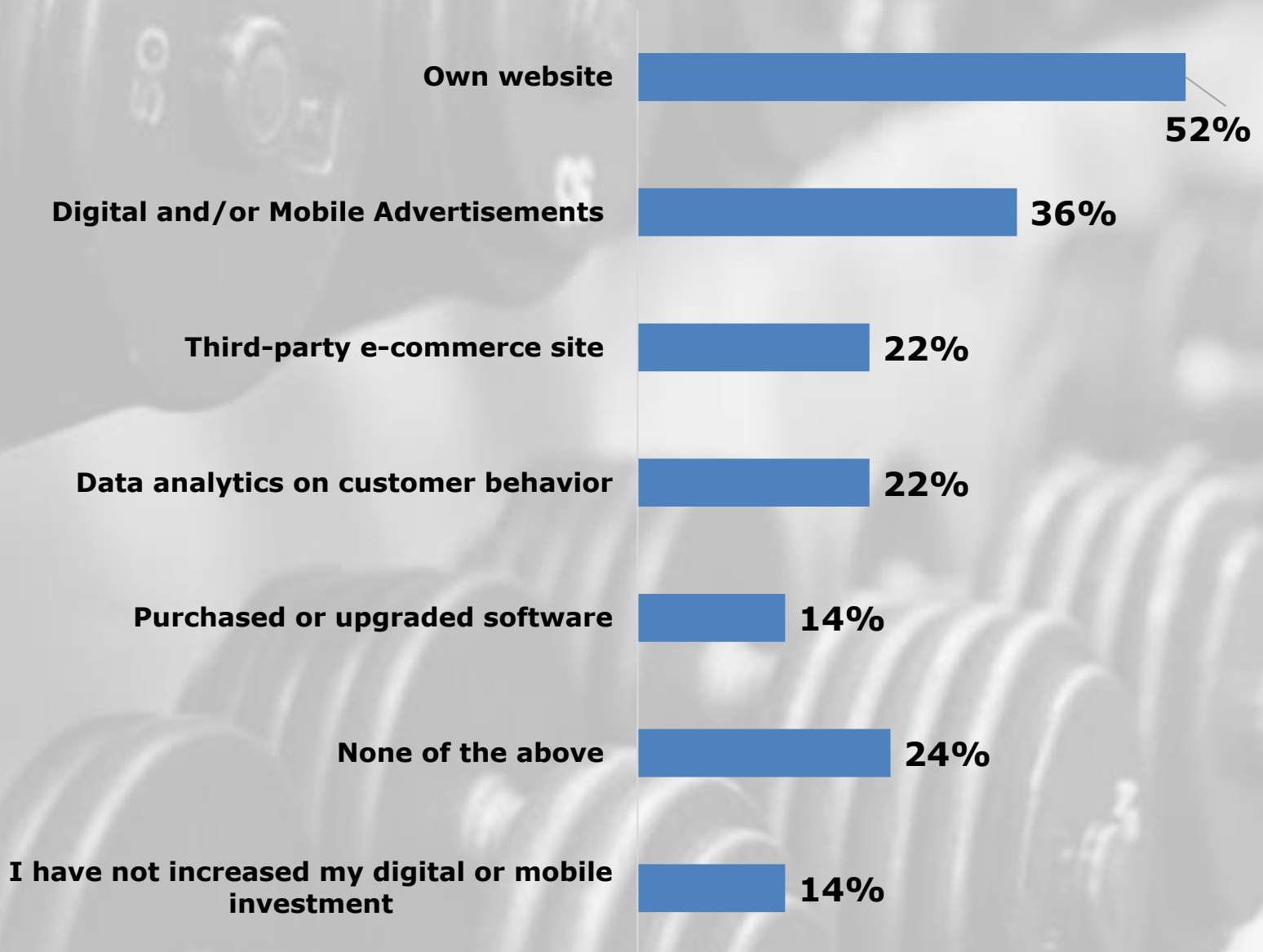
Since the COVID-19 pandemic, are you investing more into your mobile presence?



■ Yes ■ No ■ Not applicable

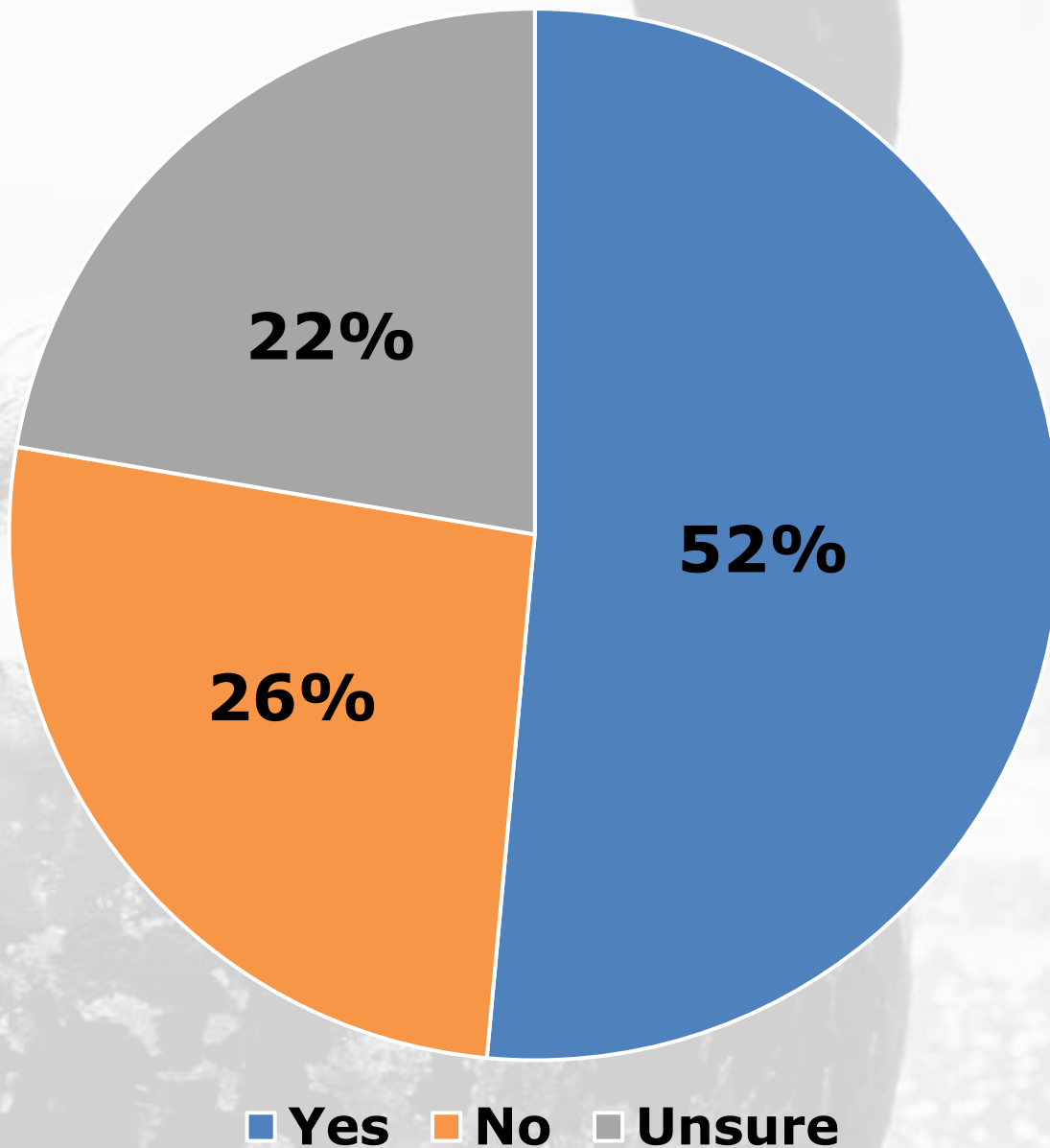
*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories.

Since the COVID-19 pandemic began, where have you increased your digital and/or mobile investment? Please select all that apply.



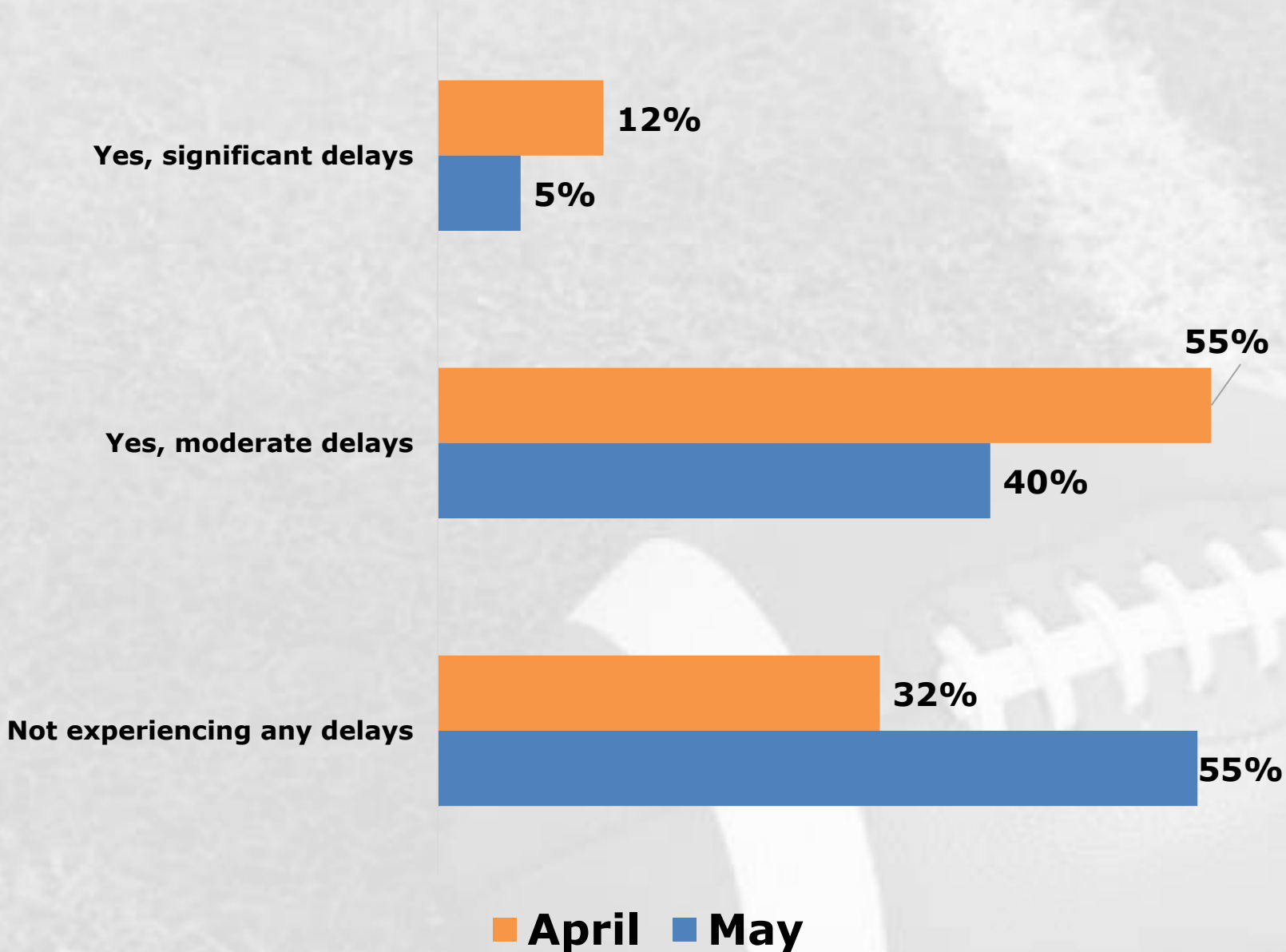
*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories.

If declines from COVID-19 persist for another two months, do you anticipate having to conduct further layoffs, furloughs or reductions in staff/salaries/hours?



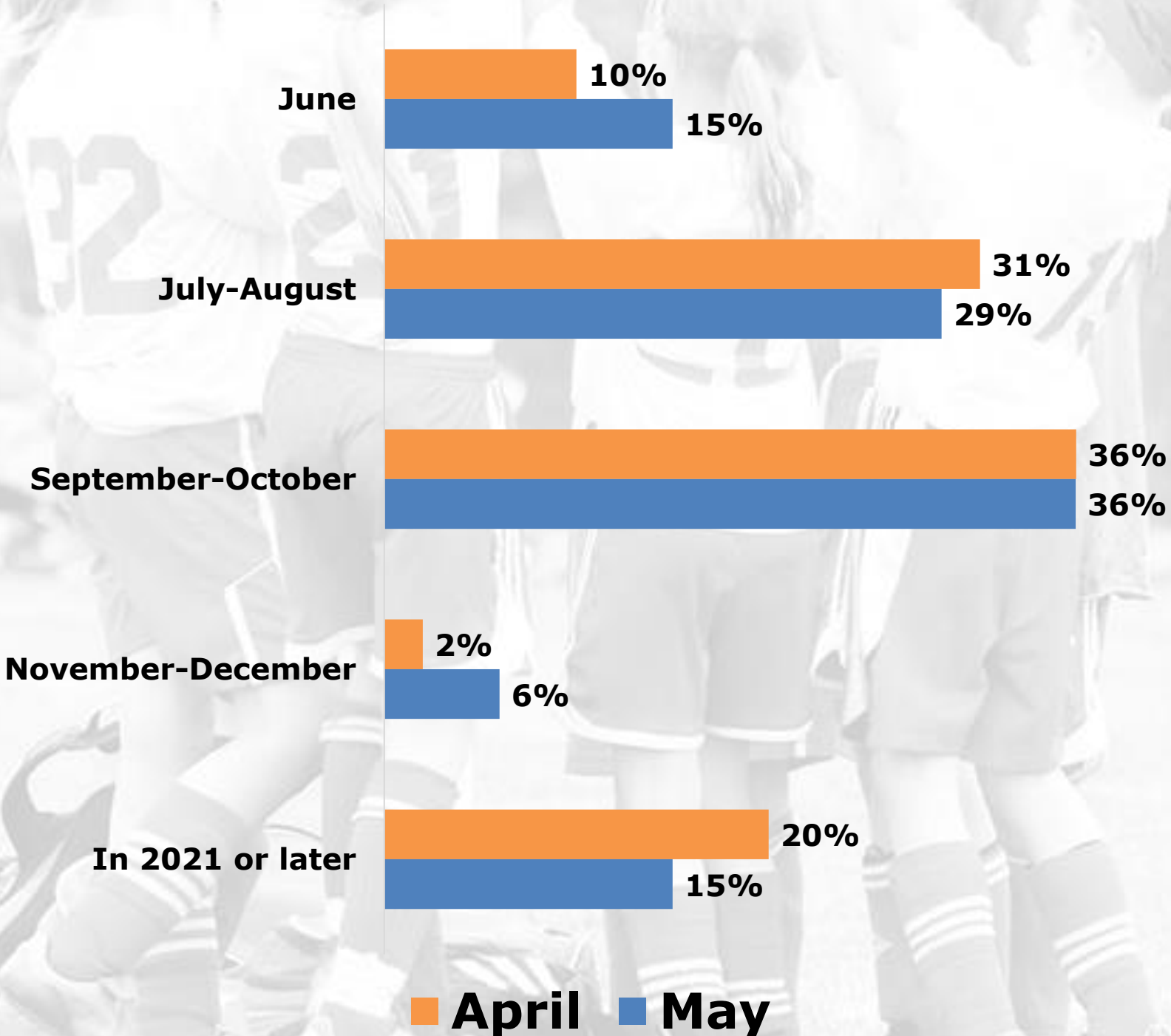
*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories.

Are you experiencing any delays at your distribution or fulfillment centers? (Comparing April and May survey editions)

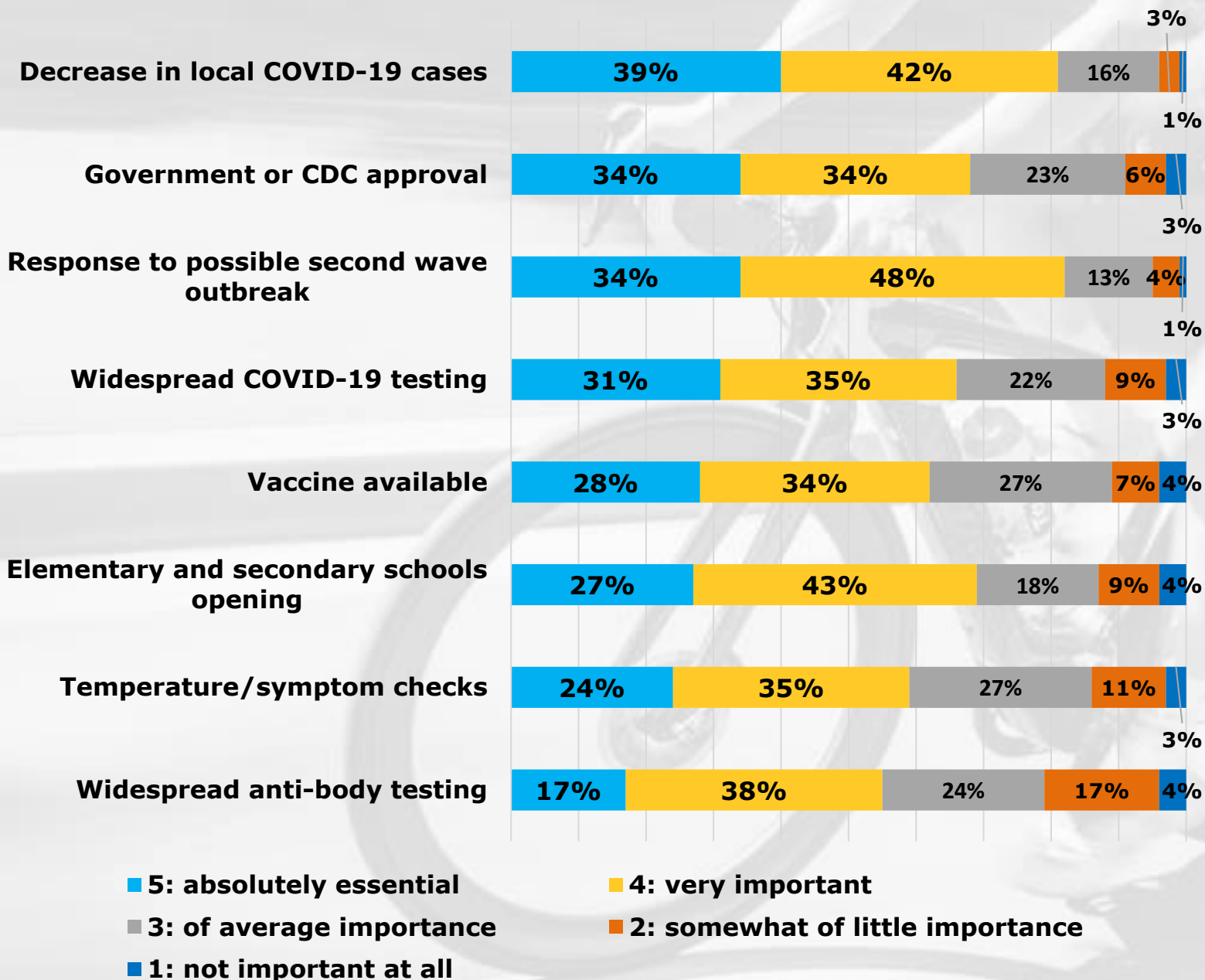


*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories that reported having a supply chain in both the April and May editions of this survey.

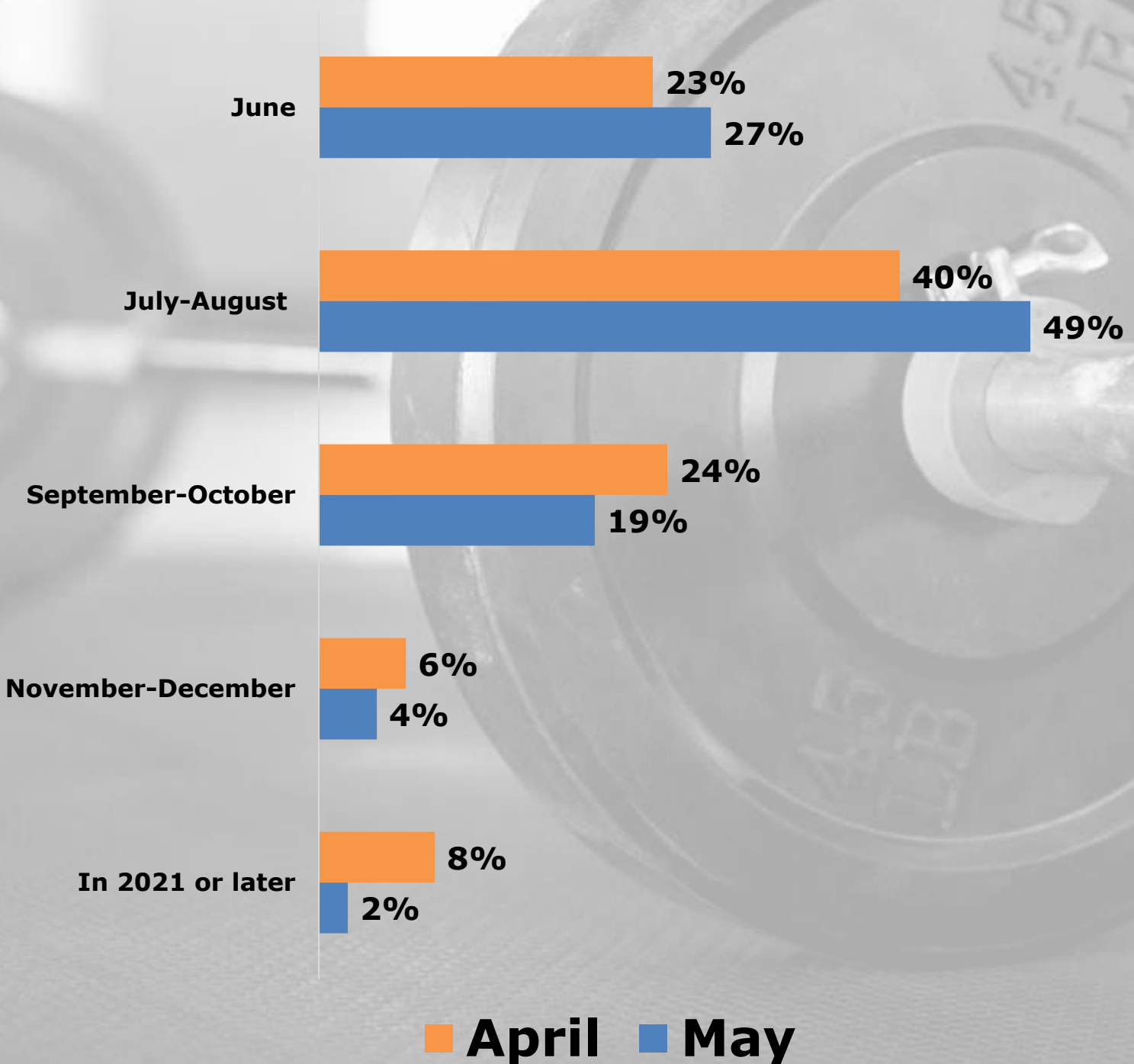
When do you think organized youth sports will first return to play? (Comparing the April and May survey editions)



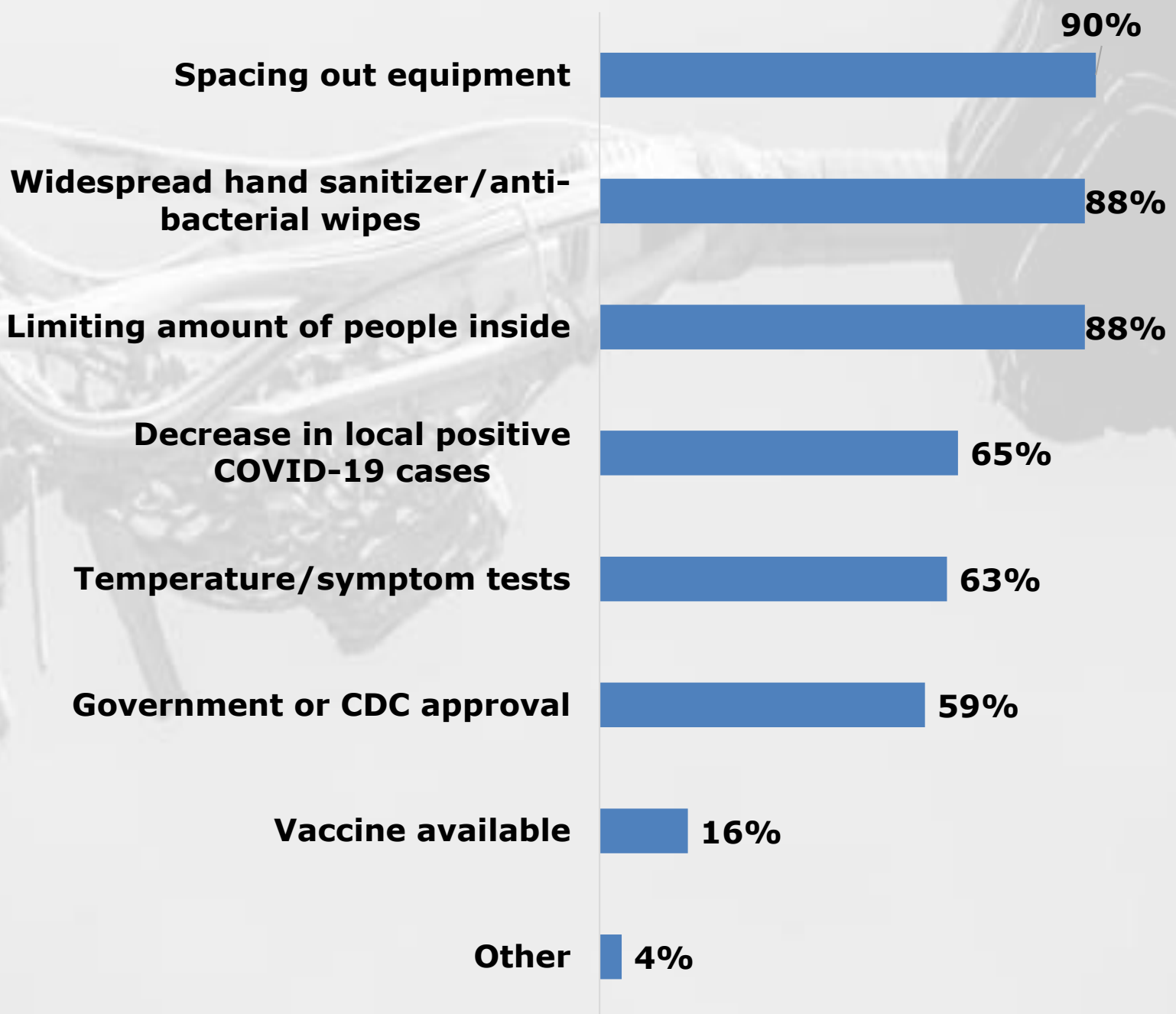
How important are the following steps or adaptations to the return of competitive league play in youth sports? On a scale of 1 to 5, where 1 is “not important at all” and 5 is “absolutely essential”.



When do you think gyms, health clubs and boutique fitness centers will re-open? (Comparing the April and May survey editions)



What precautions or adaptations need to be implemented before a re-opening of gyms, health clubs and boutique fitness studios? Please select all that apply.





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COVID-19 Industry Survey Results

Methodology:

The May COVID-19 Industry Impact survey is the second in a series of monthly surveys run by the Sports & Fitness Industry Association (SFIA). SFIA has decided to institute these simple and quick monthly surveys to get a general sentiment of several key questions regarding the COVID-19 situation and how this situation has impacted the sports and fitness industry. This edition of the survey focused on the impact COVID-19 had in May 2020.

This edition of the survey ran from June 8th through June 15th and had a total of 166 respondents. All respondents participated anonymously, and the data has been aggregated. Due to rounding, numbers may not add up to 100%. All surveys are subject to some level of standard error that is - the degree to which the results might differ from those obtained by a complete census of every business in the sports and fitness industry.

Disclaimer:

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