



COVID-19 Industry Impact Report

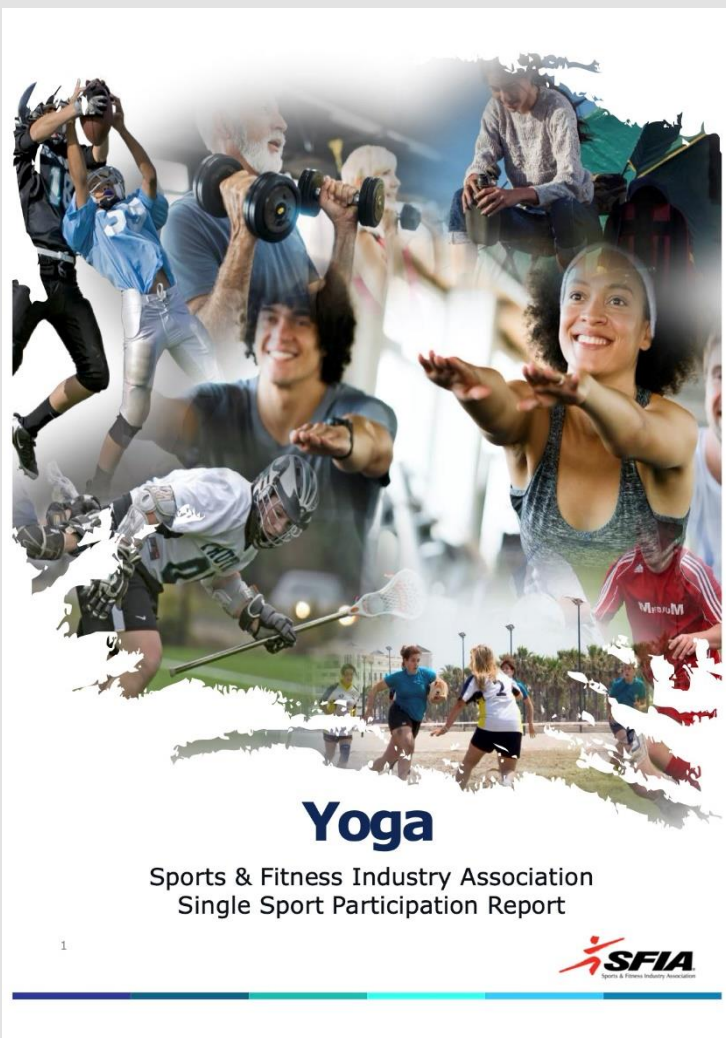
June 2020 Results







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COVID-19 Industry Survey Results

Introduction:

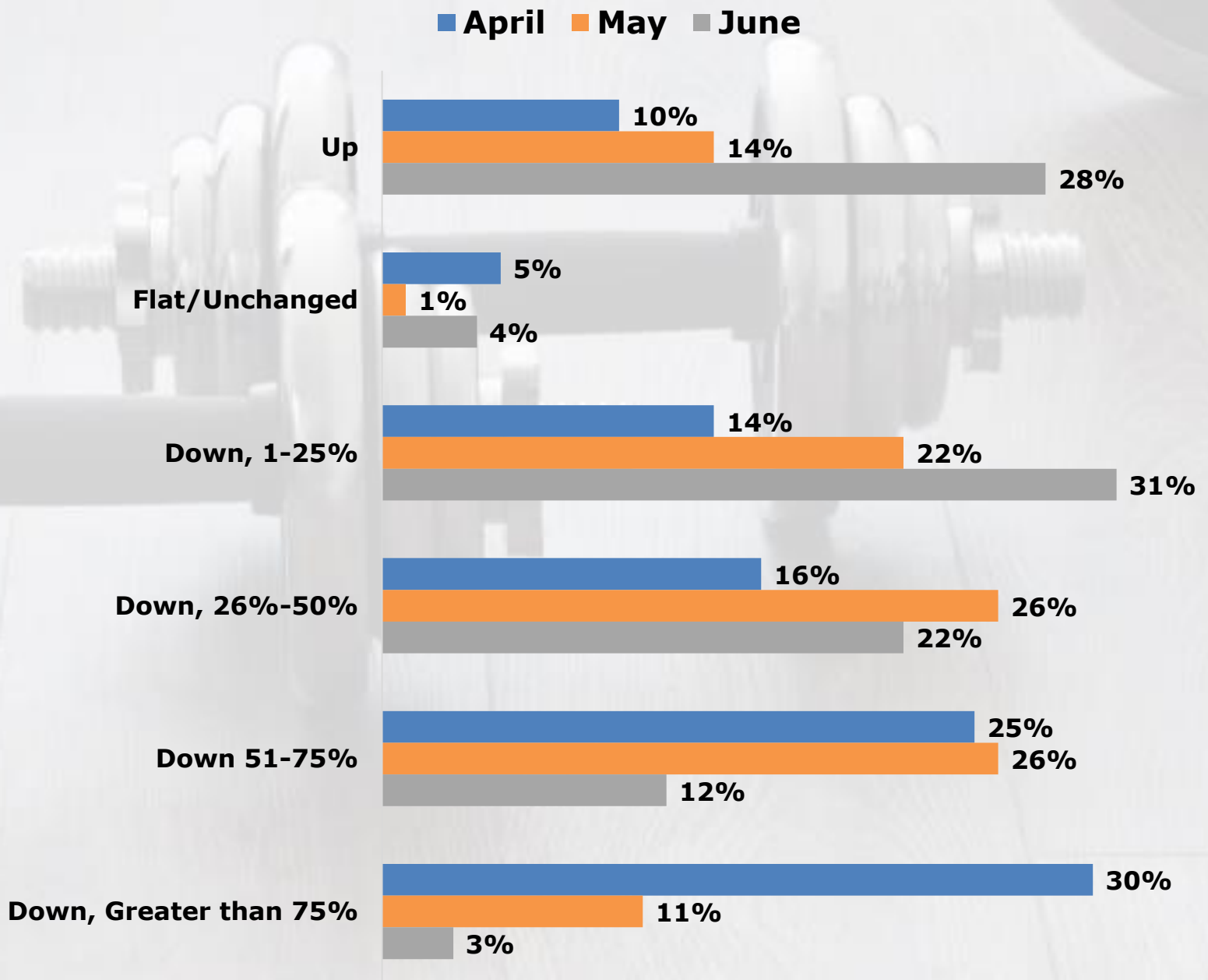
The Sports & Fitness Industry Association (SFIA) surveyed its membership to understand the effects the COVID-19 pandemic is having on the sports and fitness industry. The following insights contained in the report are intended to provide a snapshot of key business questions. We hope that this report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

This is the third 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:

- The industry's rebound from the effects of COVID-19 is going to take time. 72% of companies believe that they will not return to some semblance of pre-COVID-19 projections until 2021 or later, a 12 percentage point increase from our May edition's data.
- Month-to-month sales data shows improvement. 28% of respondents in June reported an increase of June 2020 sales when compared to June 2019, doubling May 2020 to May 2019 comparisons. Additionally, 68% of companies saw greater sales in June 2020 than in May 2020.
- The pandemic is changing the face of the sports and fitness industry. 59% predict the consolidation of companies to be the top emerging market trend after the pandemic. 72% of respondents expect Individual Sports and 66% anticipate Outdoor Sports to be the two top product categories to return to health post-COVID-19, reflecting consumers preference toward socially distanced activities.
- Respondents anticipate that the return of youth sports will be postponed. 37% of respondents expect youth sports to return in 2021 or later, a 22 percentage point increase from May report predictions.
- In regard to the re-opening of gyms, health clubs and boutique fitness centers, the importance of vaccine availability increased dramatically. 71% of respondents viewed it as a necessary precaution to be implemented before re-opening gyms, health clubs and boutique fitness centers, a 55 percentage point increase from the May Survey.

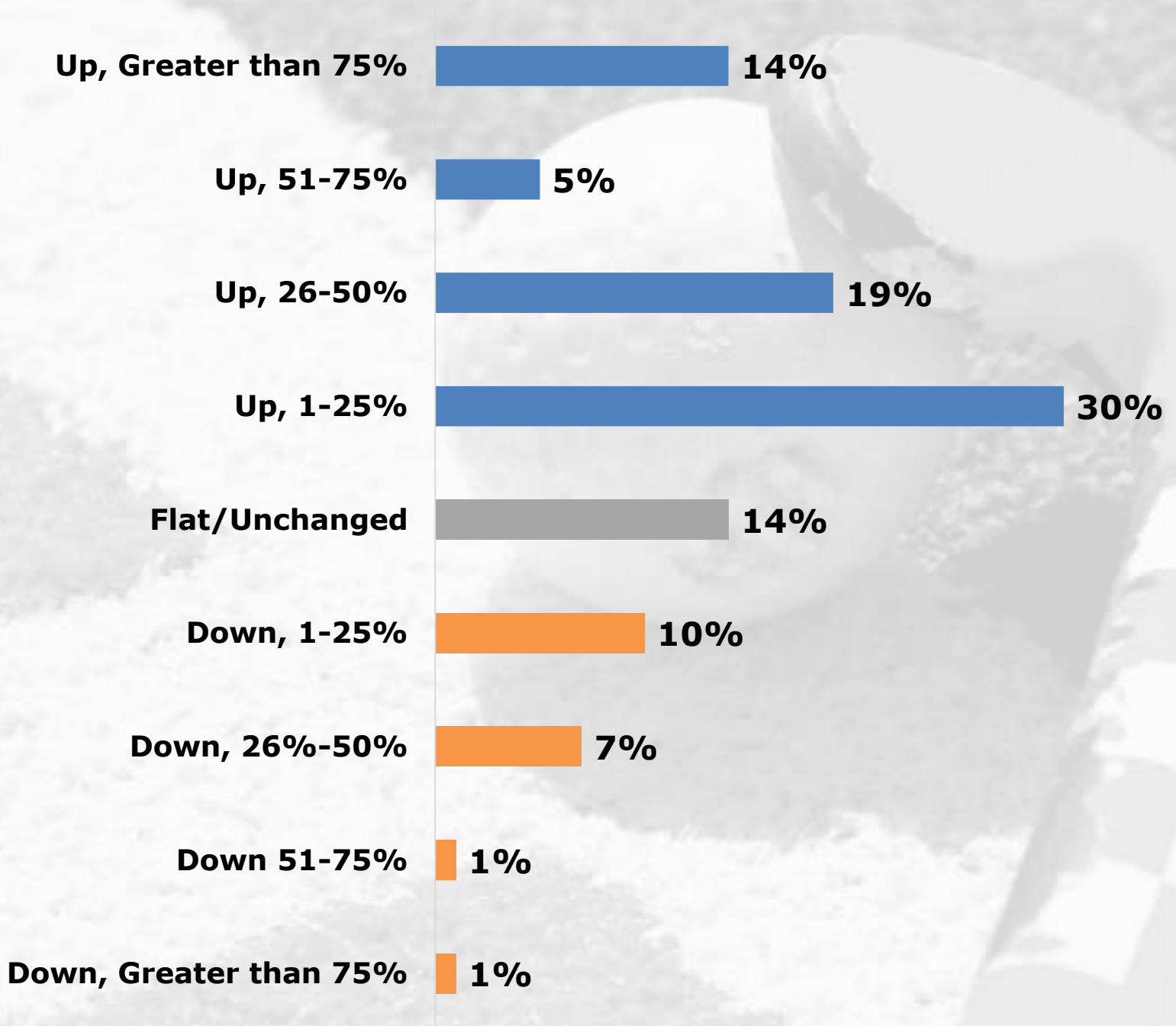
How do your June 2020 overall sales compare to June 2019?



*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.

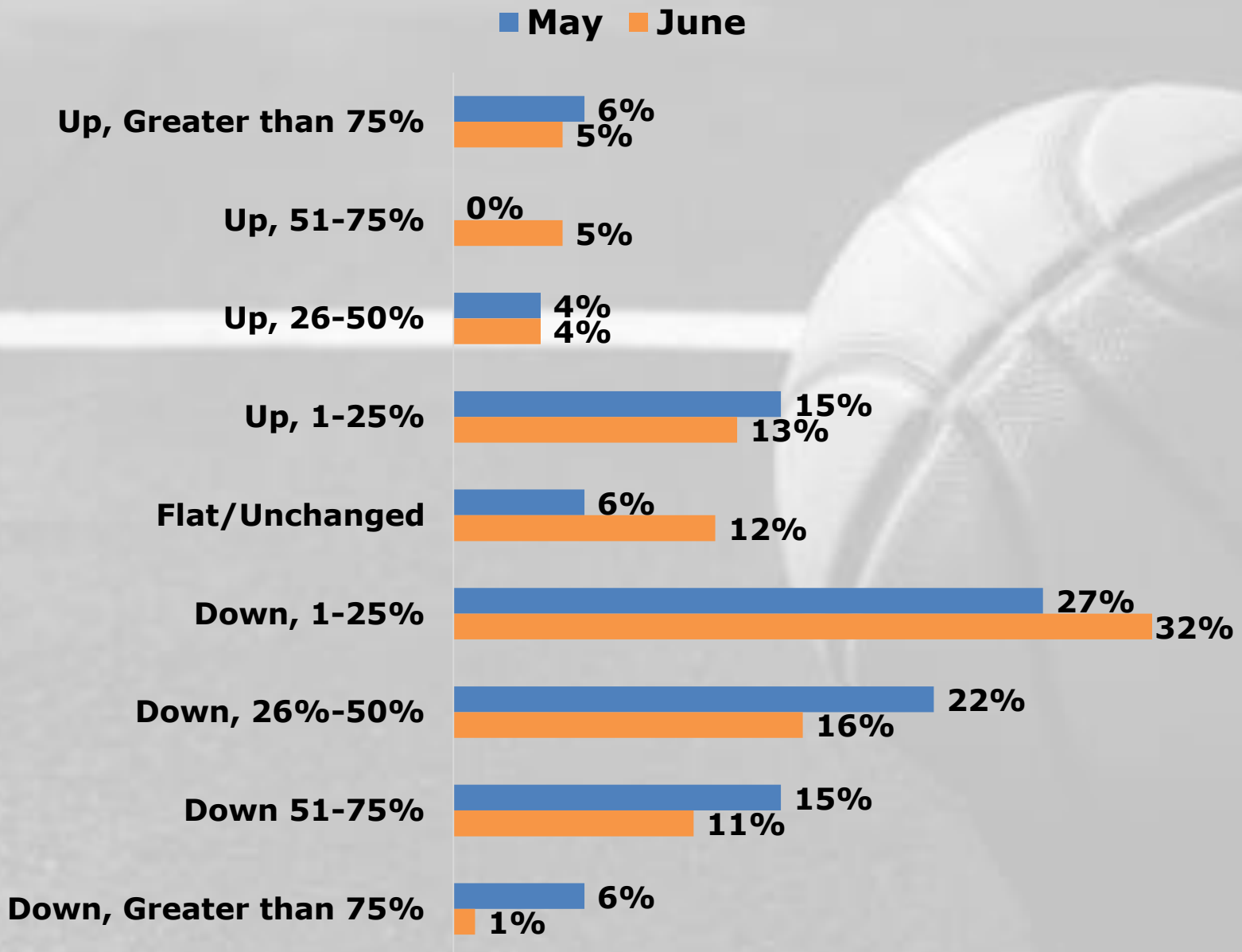
** The May and April data referenced in this chart is taken from the question "How do your April/May 2020 overall sales compare to April/May 2019?" in the April/May survey results.

How do your June 2020 sales compare to May 2020?



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

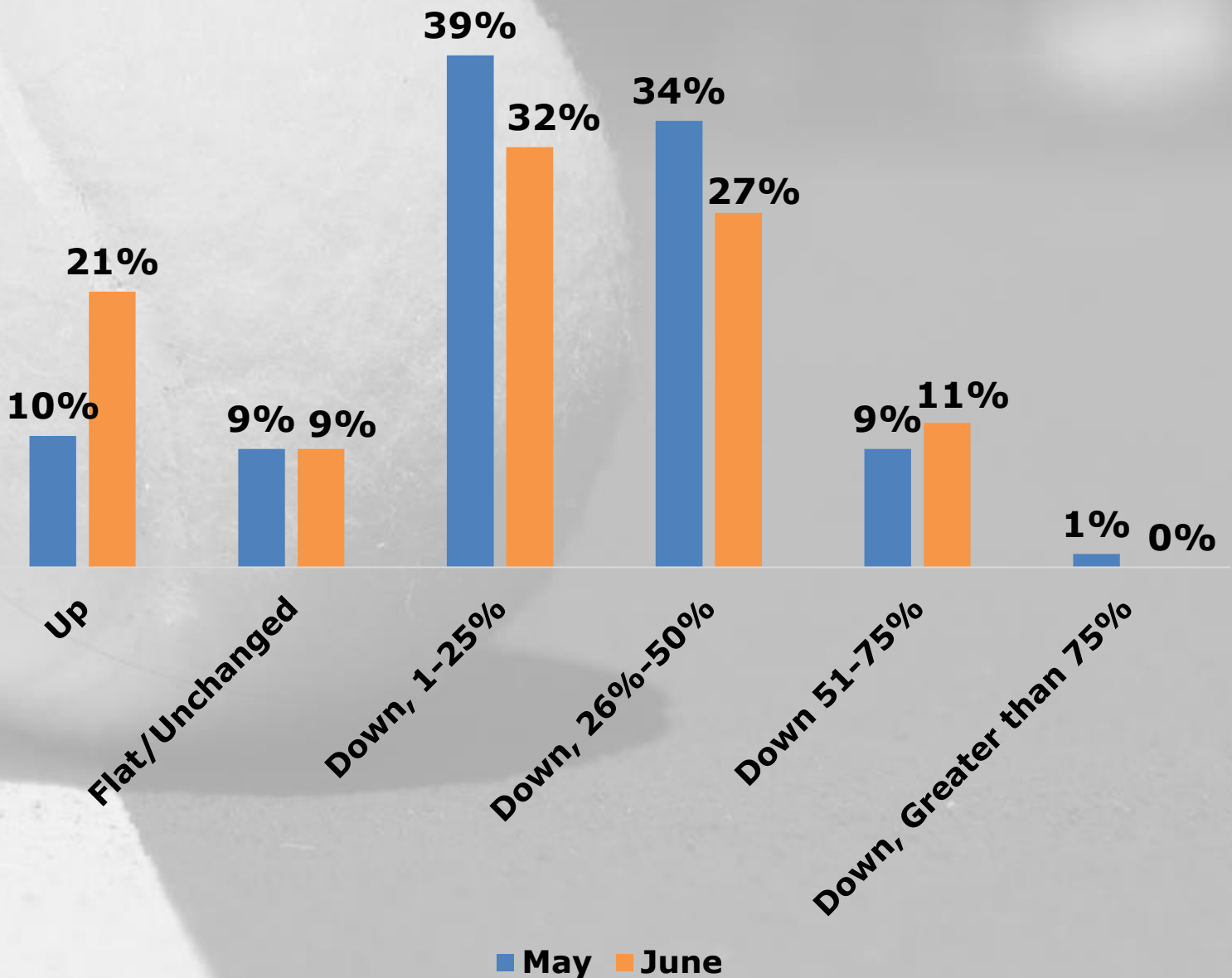
How are you projecting your July 2020 sales compared to July 2019?



*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 May data referenced in this chart is taken from the question "How are you projecting your June 2020 sales compared to June 2019?" in the May survey results.

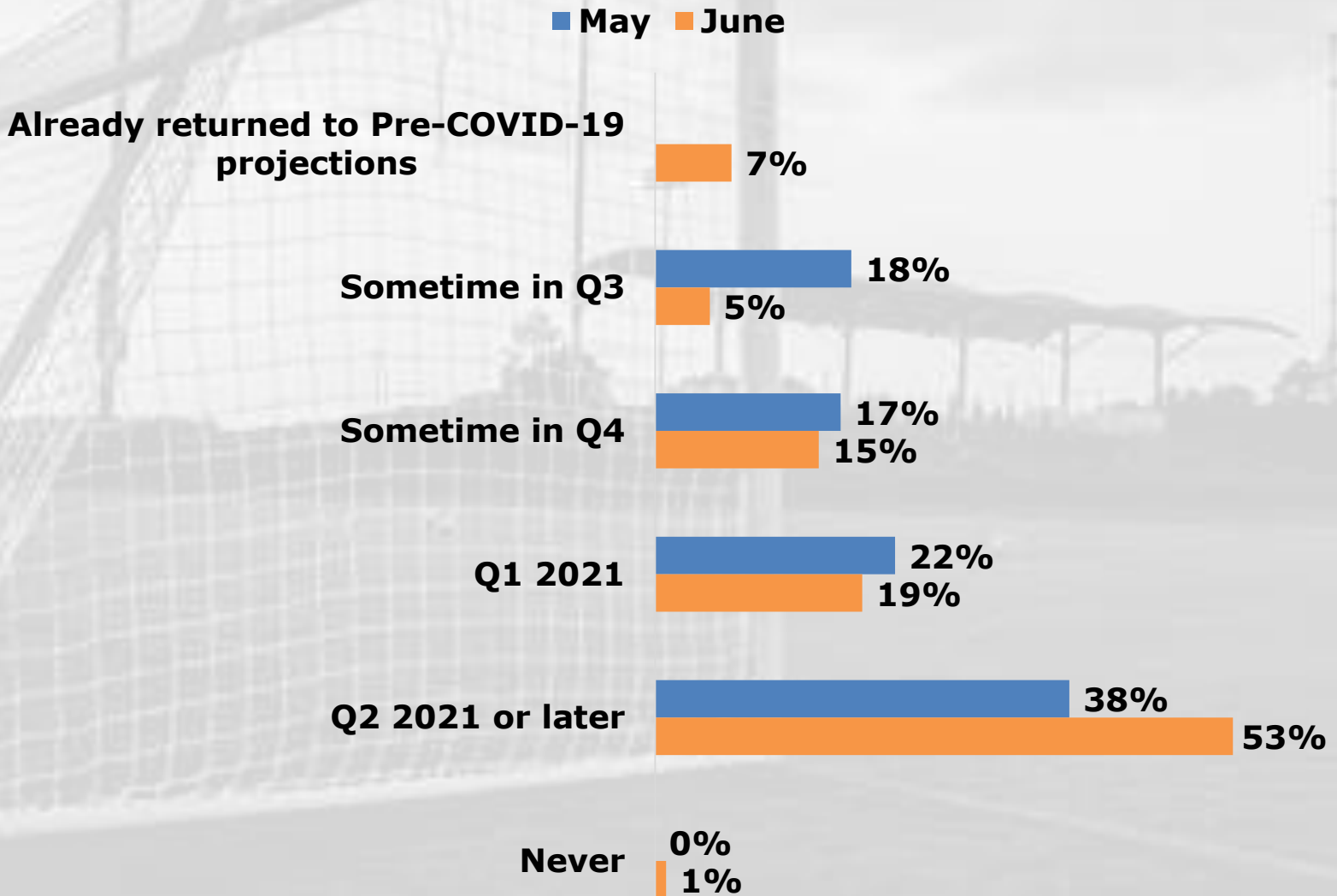
How are you projecting your fiscal year 2020 sales compared to 2019?



*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 in May and June editions.

**The May data referenced in this chart is taken from the same question in the May survey results.

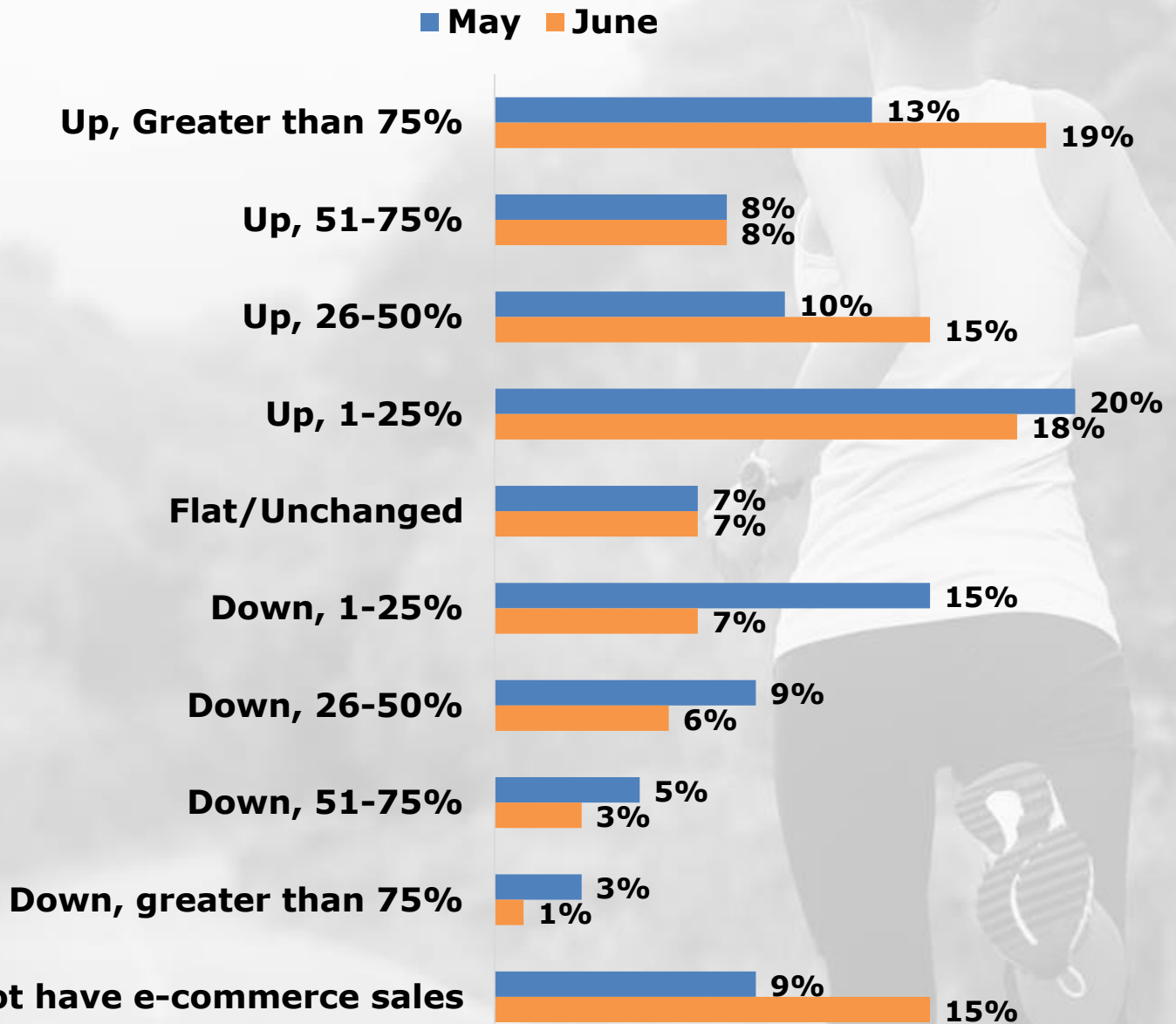
Given the current business climate, when do you anticipate that sales will resume to some semblance of pre-COVID-19 projections?



*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.

**The May data referenced in this chart is taken from the same question in the May survey results.

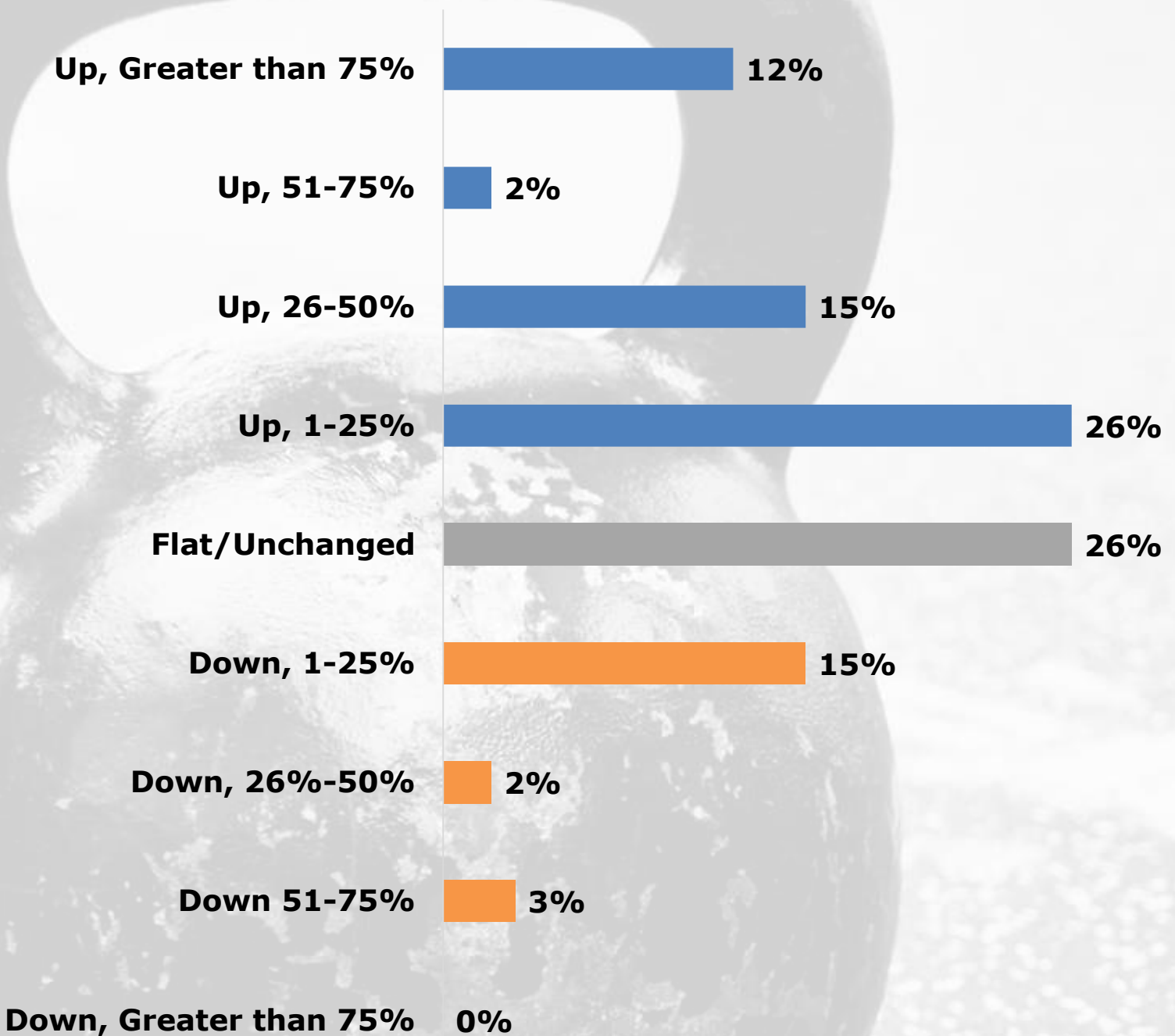
How do your June 2020 e-commerce sales compare to June 2019?



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

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

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

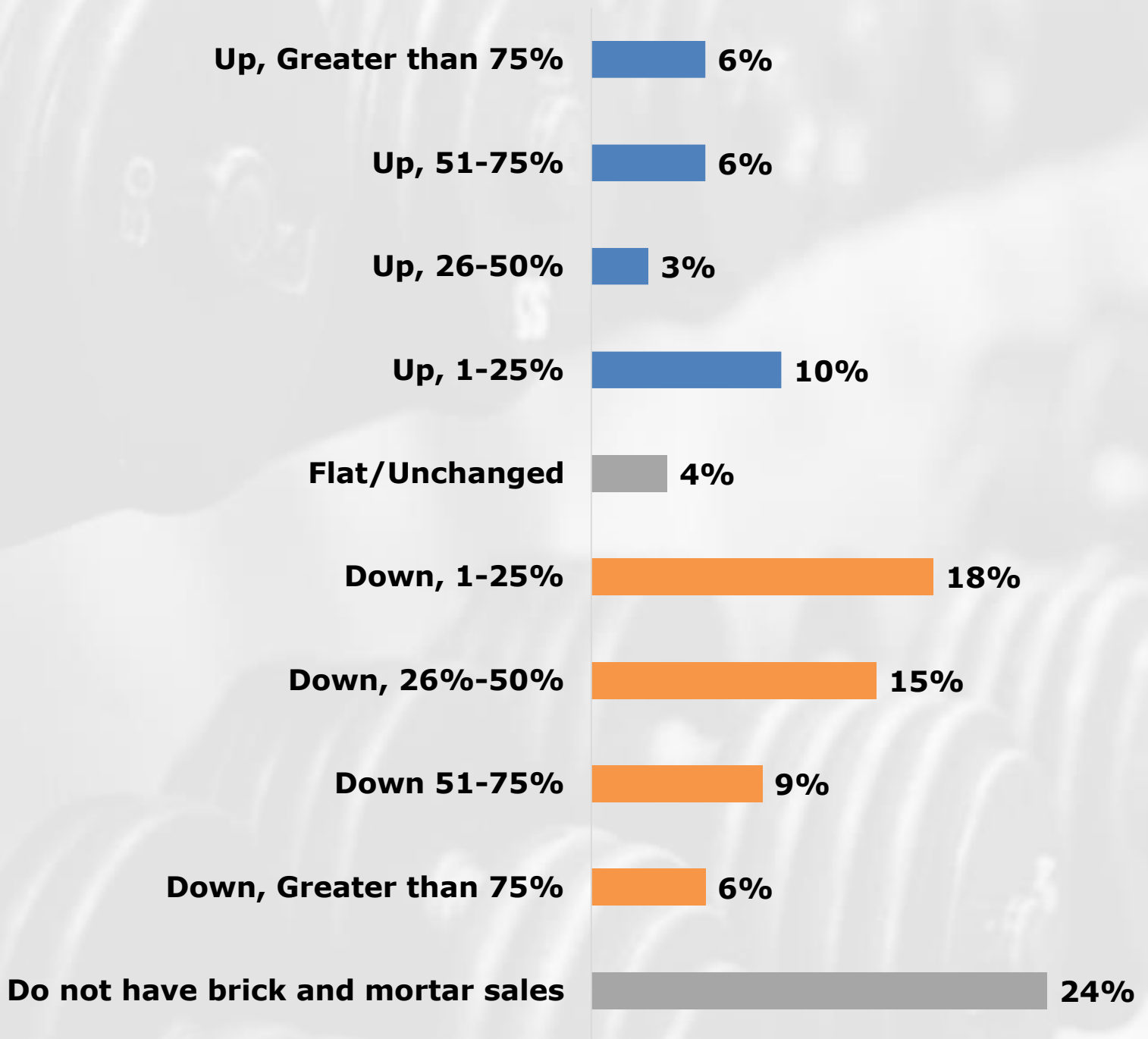


*This chart only presents responses from the "Sporting Goods Equipment Manufacturers/Brands", "Fitness Equipment Manufacturers/Brands", "Retailer" and "Sport & Fitness Technology Company" categories that reported e-commerce sales.



COVID-19 Industry Survey Results

How do your June 2020 brick and mortar sales compare 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.



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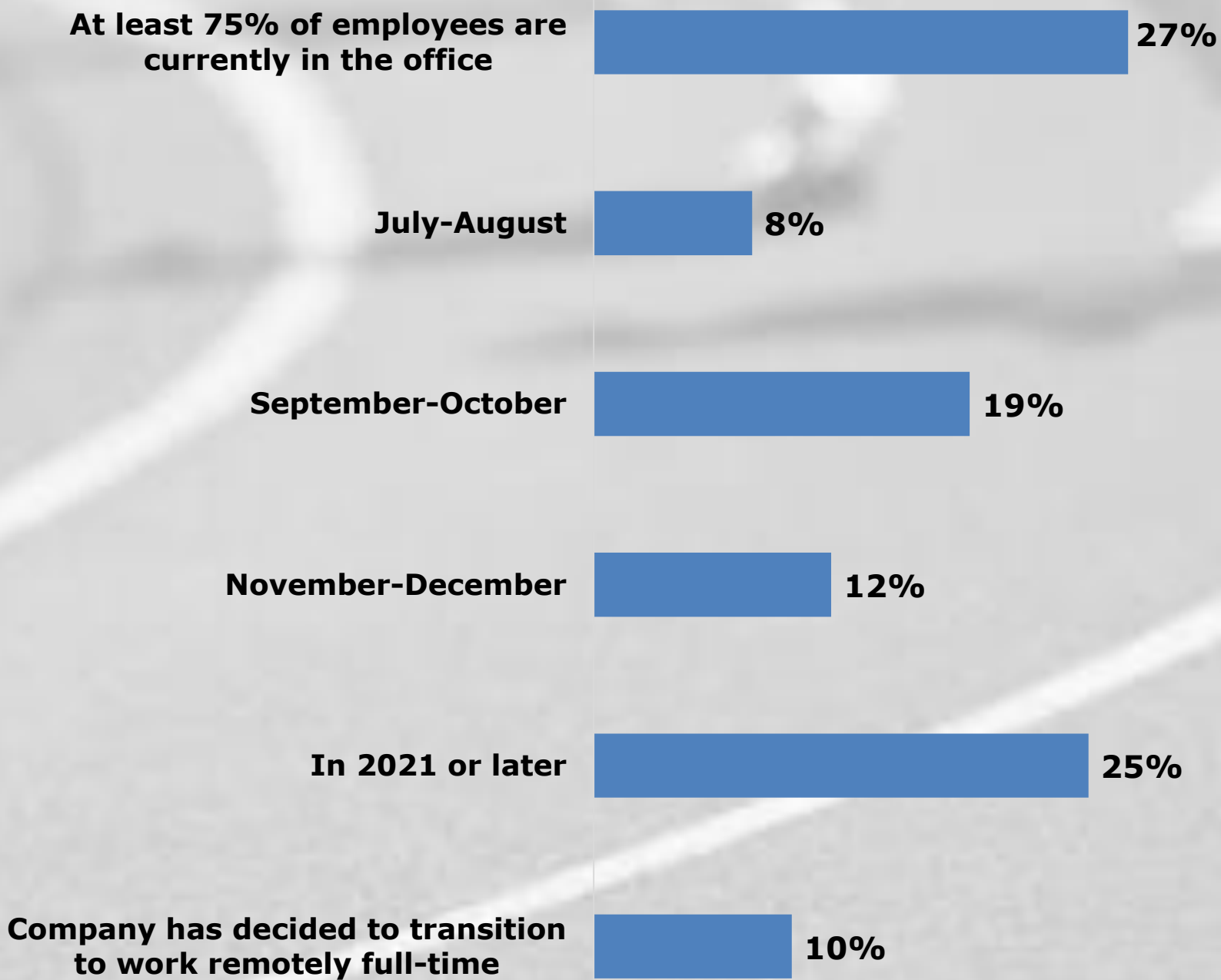
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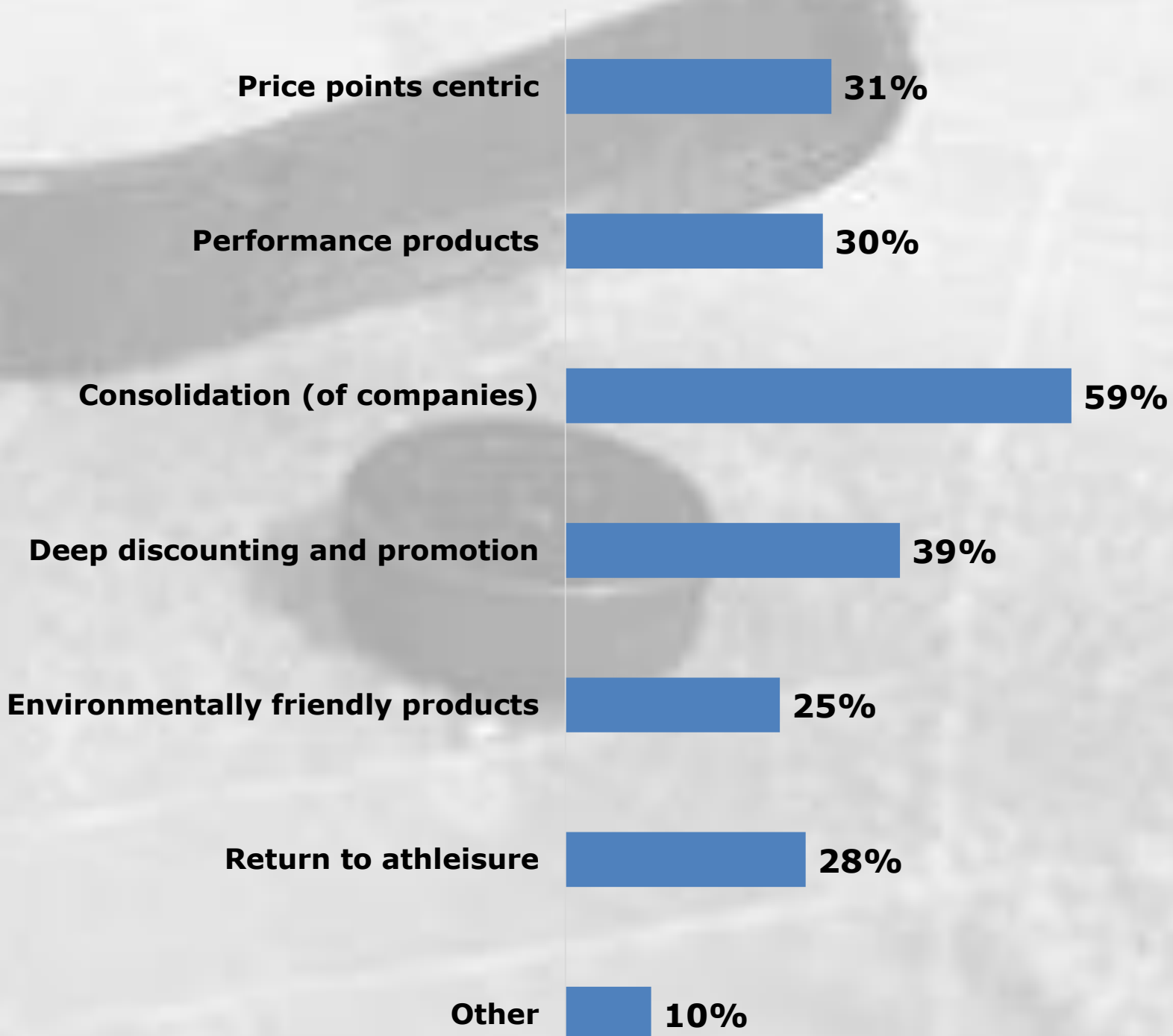
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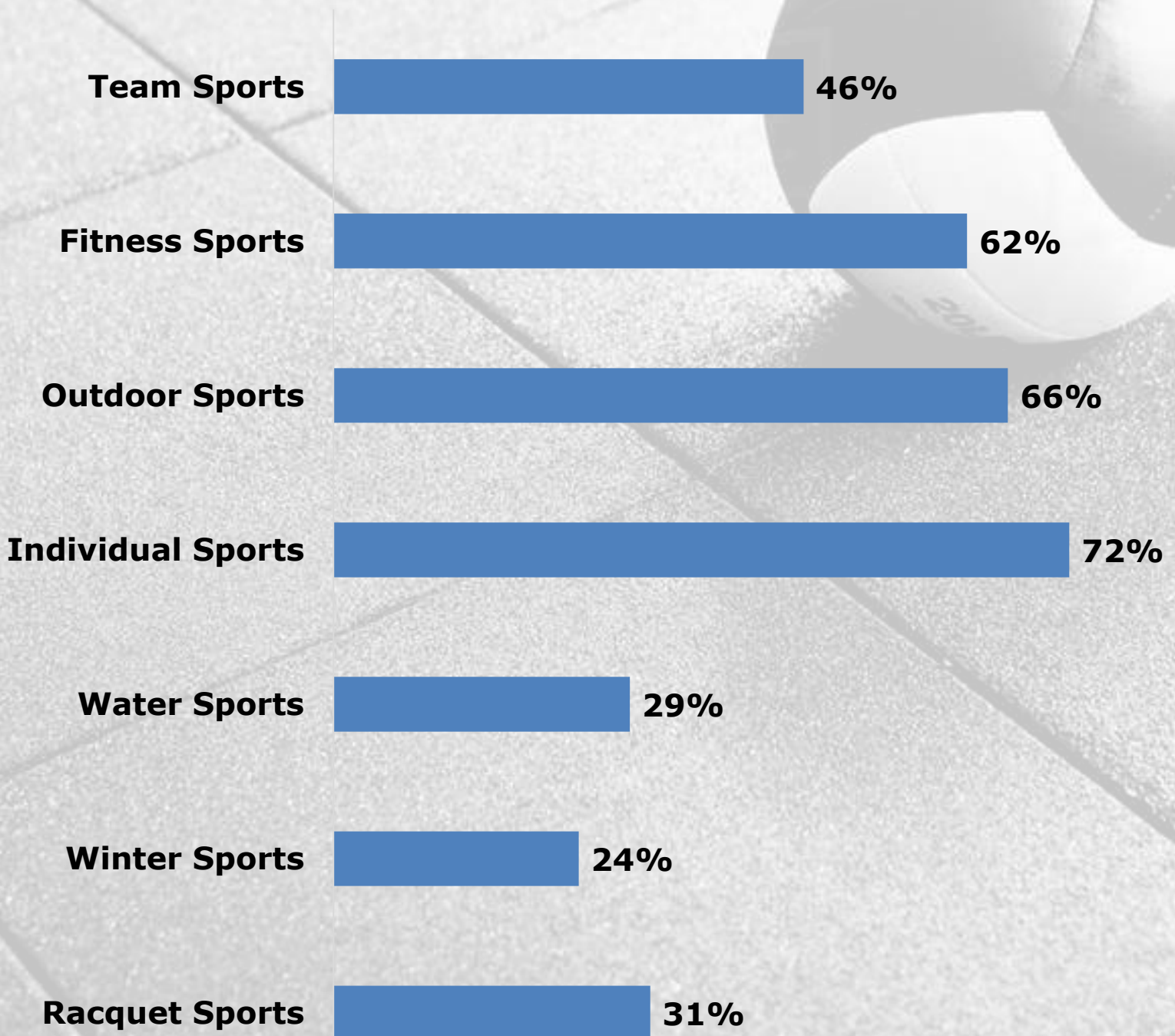
When is your company planning to bring back most of their current employees (at least 75%) to the “physical” office?



What would be the emerging market trends after the pandemic? (Check all that apply)



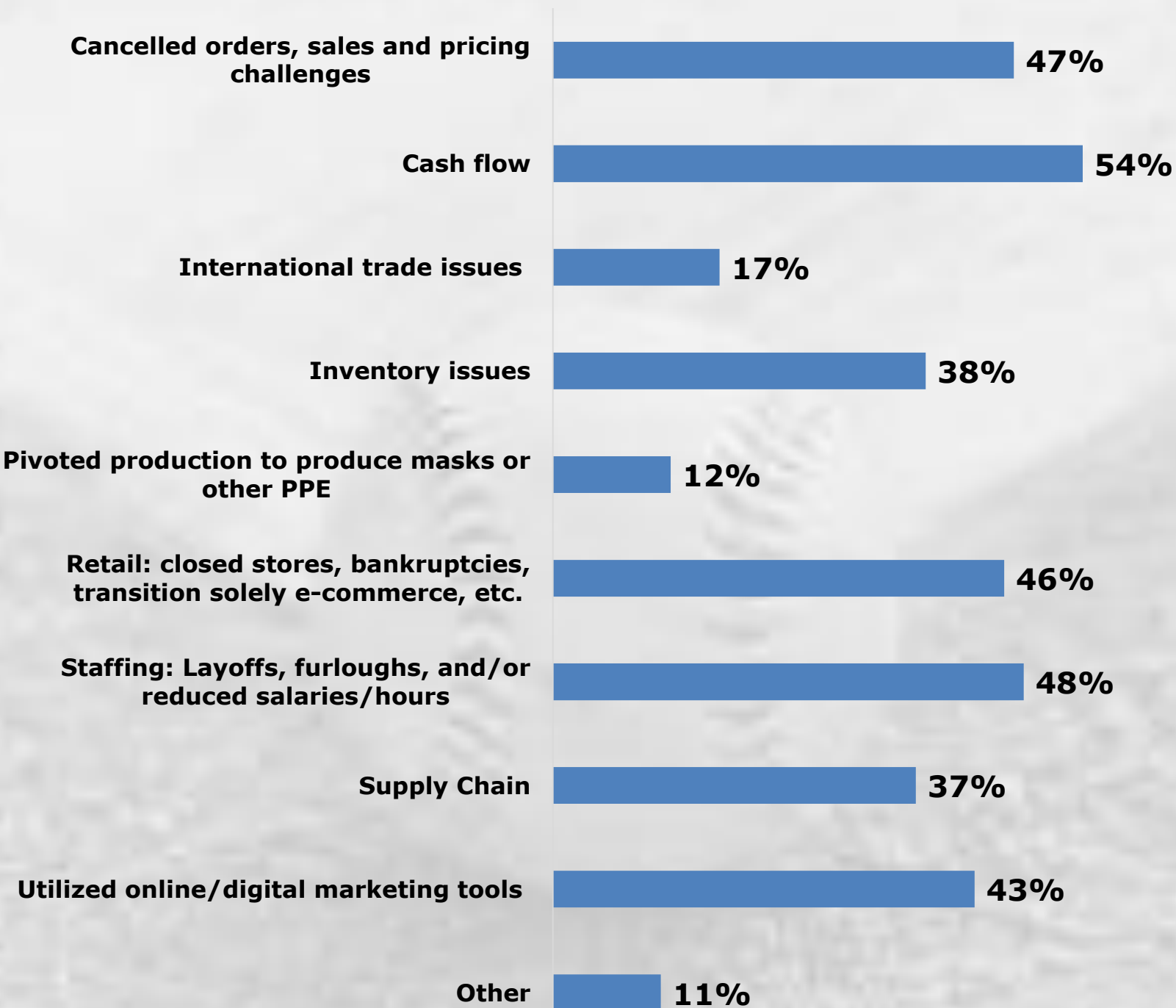
What product categories will return to health after the pandemic? (Check all that apply)



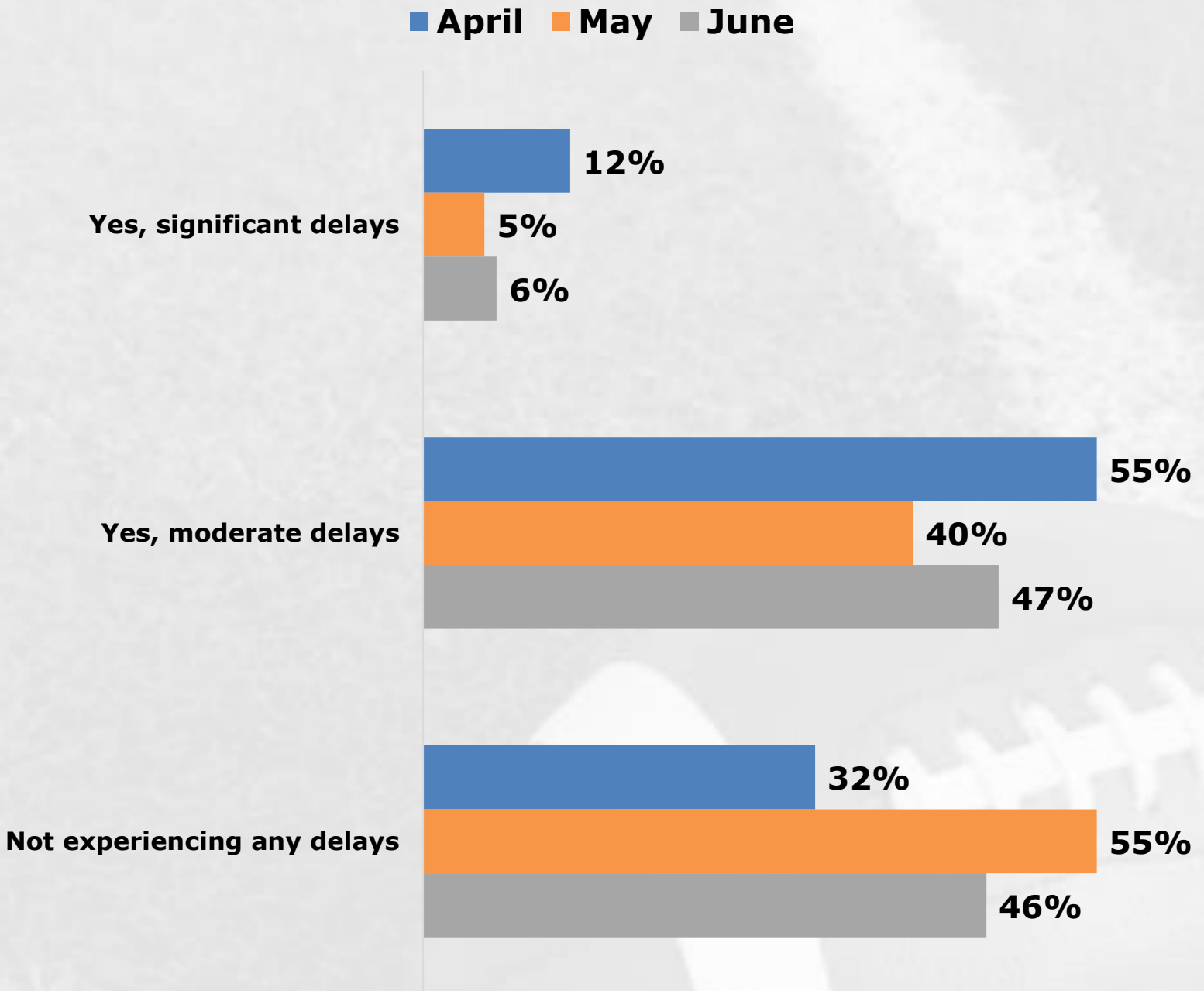


COVID-19 Industry Survey Results

Thinking about your business 6 months from now, in what ways do you think it will be impacted/challenged by COVID-19? (Check all that apply)



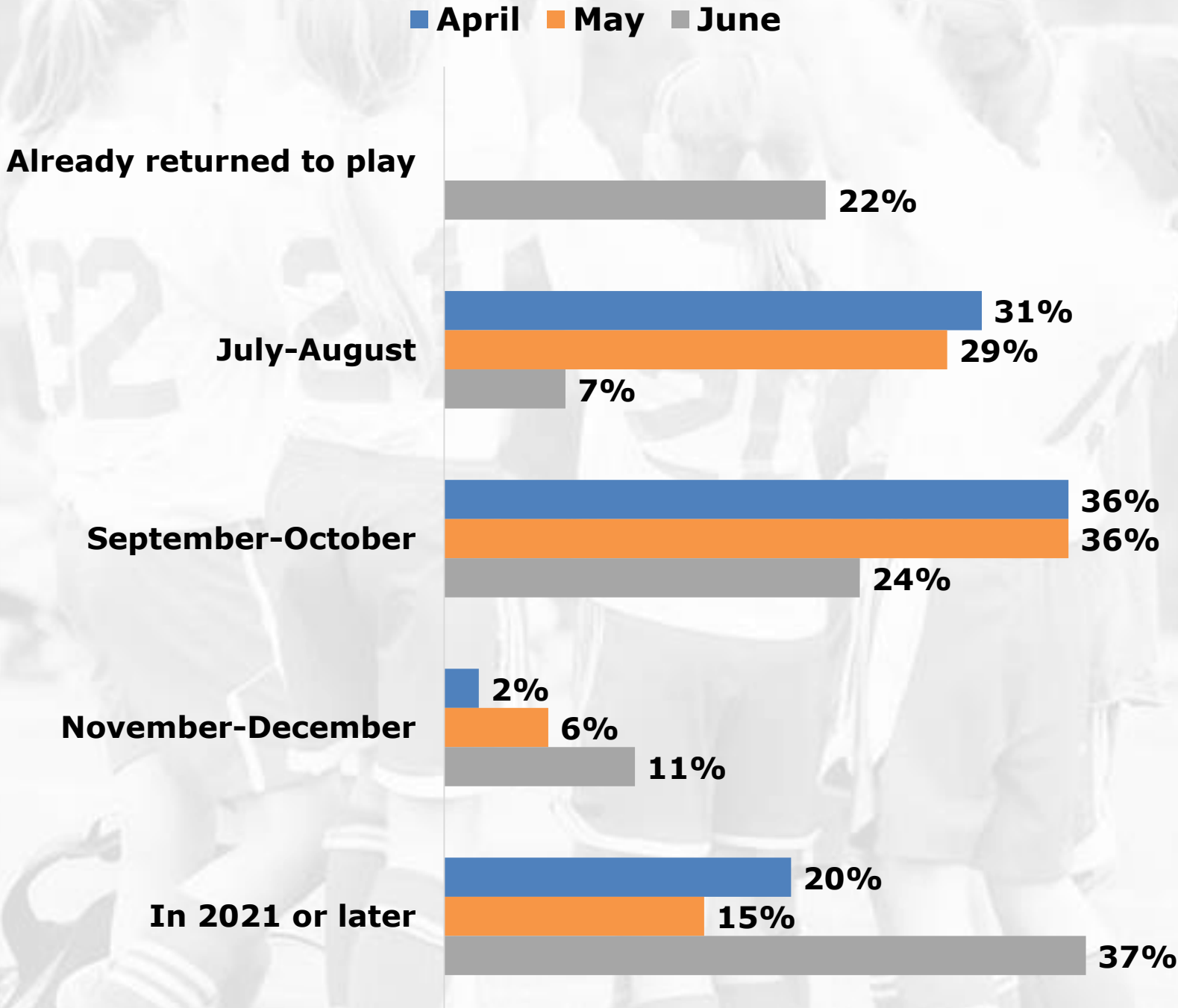
Are you experiencing any delays at your distribution or fulfillment centers?



*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 fulfillment center in both the April, May, and June editions of this survey.

**The May and April data referenced in this chart is taken from the same question in the April/May survey results.

When do you think organized youth sports will first return to play?

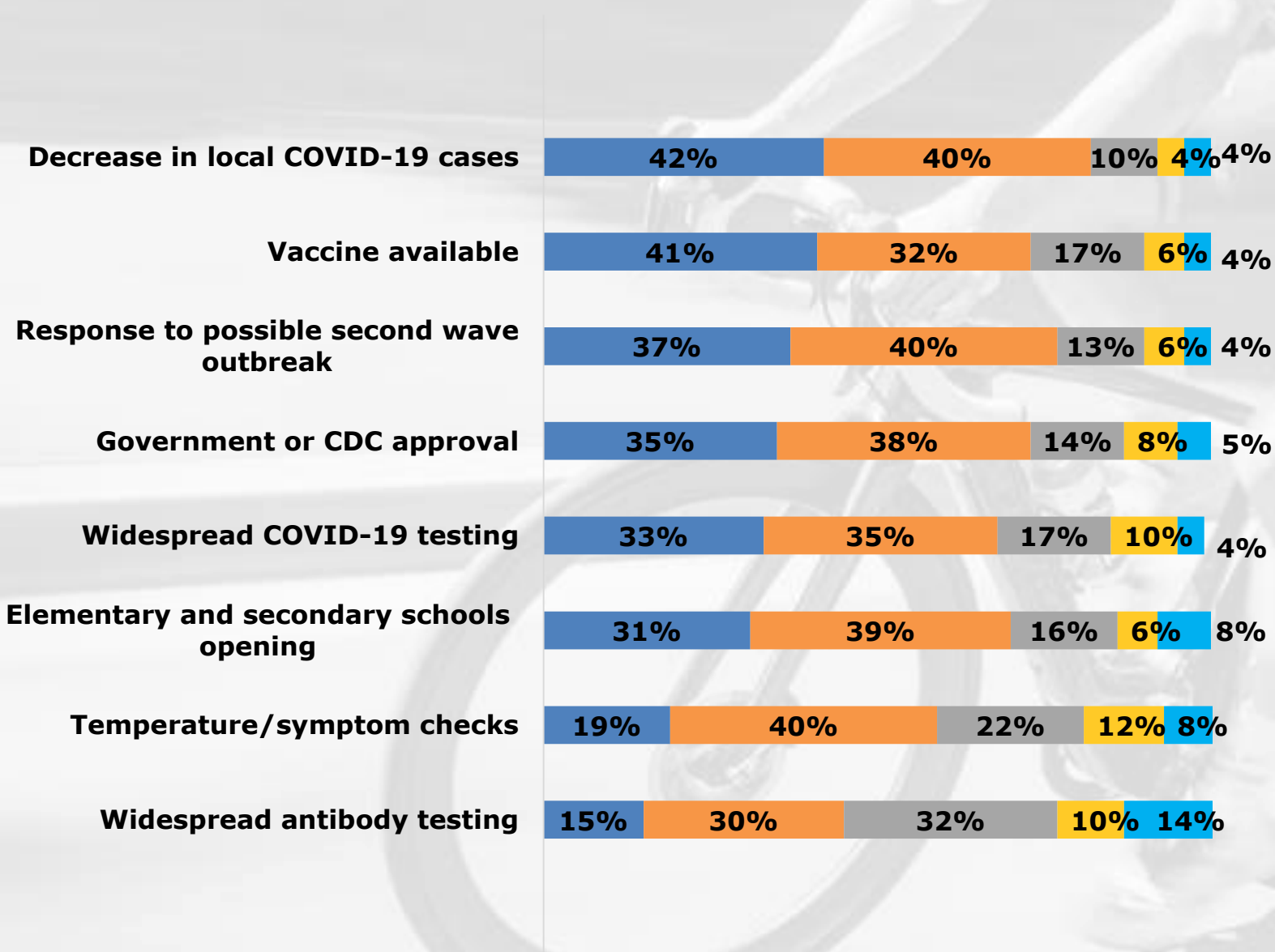


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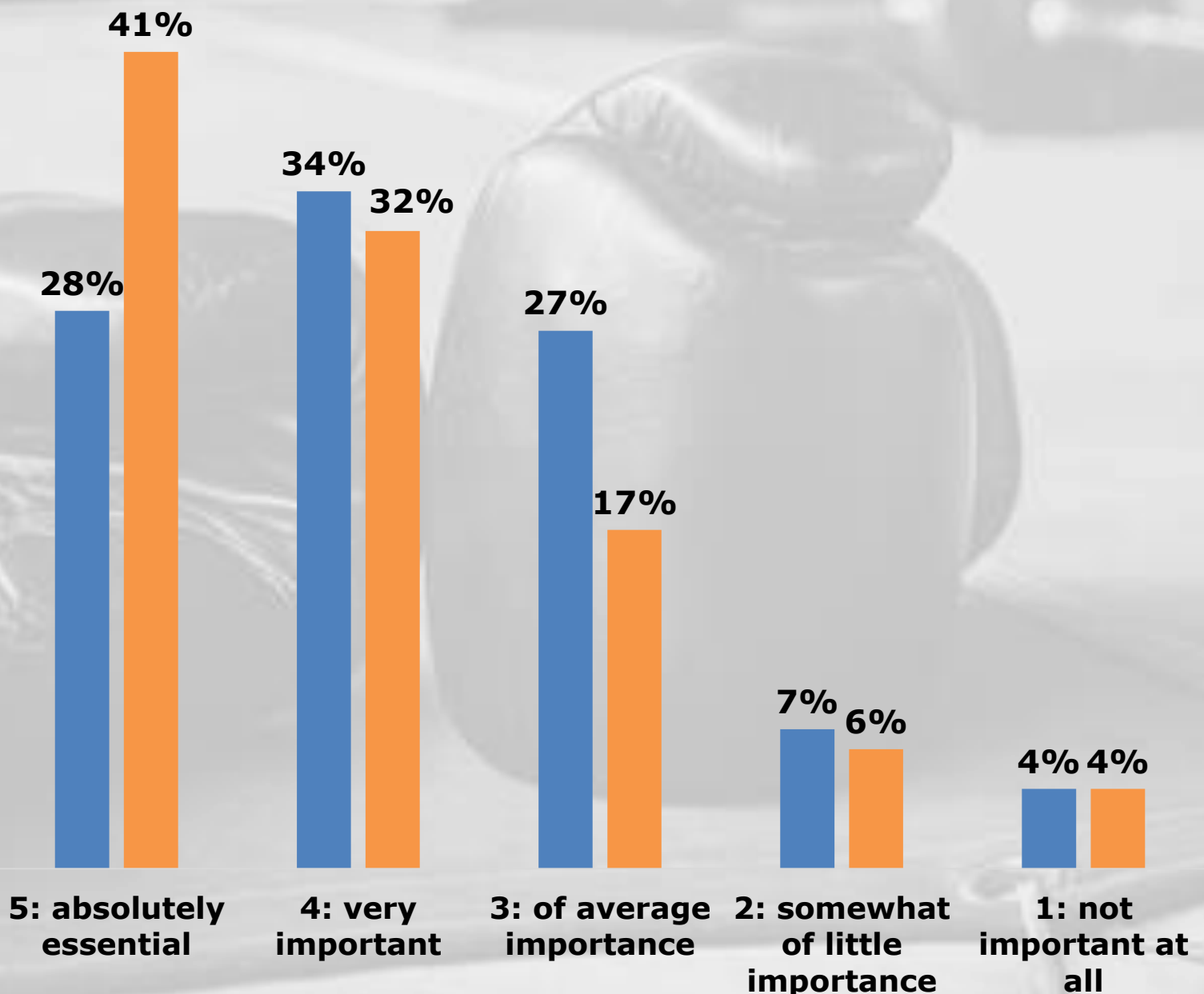
How important are the following steps or adaptations to the return of competitive league play in youth sports? On a scale of 1 to 5, where 1 is “not important at all” and 5 is “absolutely essential”.



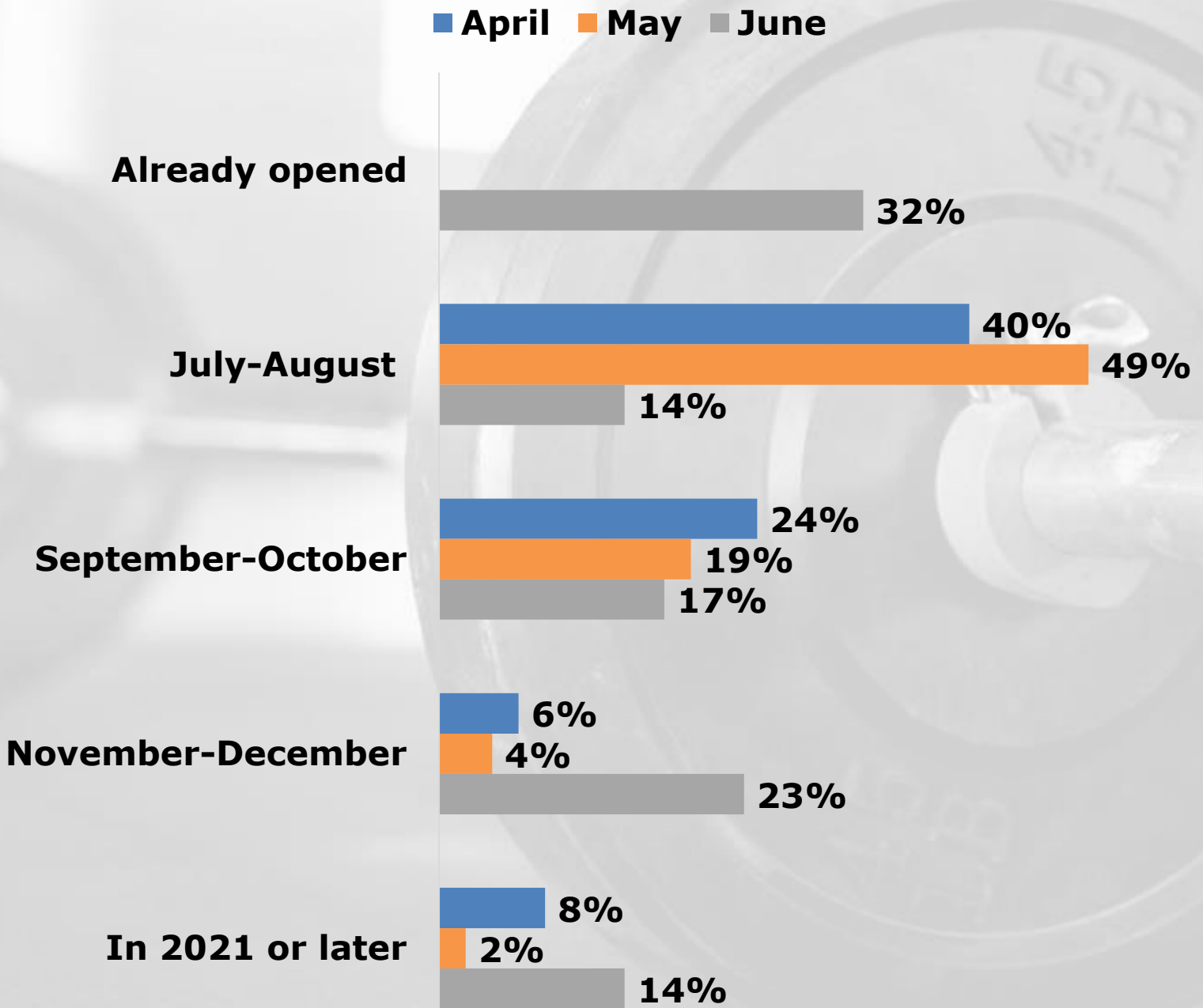
- 5: absolutely essential
- 4: very important
- 3: of average importance
- 2: somewhat of little importance
- 1: not important at all

Comparing the importance of “Vaccine Availability” on the return of competitive league play in youth sports between May and June reports.

■ May ■ June

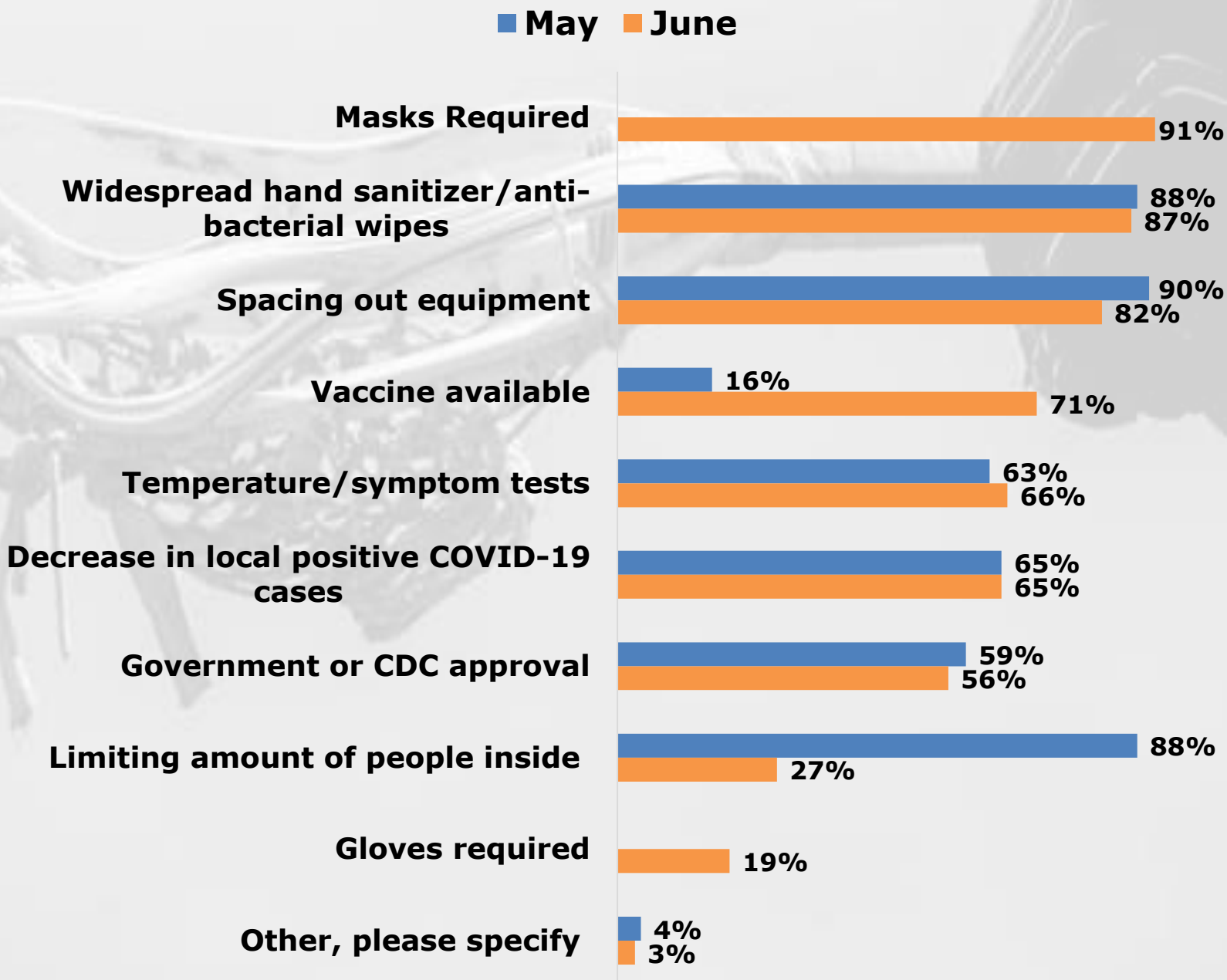


When do you think gyms, health clubs and boutique fitness centers will re-open?



*The May and April data referenced in this chart is taken from the same question in the April/May survey results.

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



* "Masks Required" and "Gloves Required" were only asked in June survey edition.



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Methodology:

The June COVID-19 Industry Impact survey is the third 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 June 2020.

This edition of the survey ran from July 13th through July 20th and had a total of 122 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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