



ACQUISITIONS, REALIGNMENTS AND BANKRUPTCY CLOSURES SHOOK UP THE RETAIL PLAYING FIELD IN 2006. BY THERESE IKNOIAN

Just as you begin to think there can't be as much change in fitness retail as there has been, store acquisitions, closures, realignments and other runs and passes seemed to alter the game all over again.

From the big specialty guys to sporting goods players known for fitness to small store chains, when the buzzer sounded at the end of the year's fourth quarter the field looked more than a wee bit different. And 2007 already promises a new look on the specialty field. But we digress. We have another year until the 2007 scorecard will be out. Remember, our annual "top retailer" FitBiz edition in early spring each year is all about the previous calendar year.

As we did with our first FitBiz "top retailer" edition in 2004, we stuck with concrete numbers that can't be fudged or made to lie. That means this chart simply lays out the leading specialty shops—as well as sporting goods and mass folks key to fitness—and only details store numbers, states, growth, closings and the like. With it, a picture is painted about the state of the fitness industry. We know, really we do, that store volume means a lot. We know there are single stores that do HUGE volume and small chains with only a handful of stores that do more volume than chains twice their size. In fact, we hope and encourage retailers to grow volume per store as a more profitable way to survive the current economy. However, in doing these charts, we feel it is too easy for someone to shove numbers around in their favor since all of our specialty stores are private and don't have to show us proof-positive. That would leave our charts less than accurate. Here at

SNEWS®, as most of you know, we aren't about guessing.

You can pin your own average per-store figures to these counts to come up with guesstimates of revenue and how those numbers would change rankings. One repeat this year is a change we made last year: If one company owned multiple store brands, we lumped them together in one listing, breaking out the store brands by name with their individual numbers as a sub-listing of the company's listing. That affects six listings. Interesting to note is that in our first couple of years we actually lopped the list at 25 and still left out a couple that had five stores. In last year's FitBiz representing 2005, we had 24 companies on the list for a count of 467 doors. This year, the list of specialty stores as of Dec. 31, 2006, was cut off at 23 (ALL of those with five or more, as far as we can tell), accounting for 528 doors, or a whopping 61 more than a year earlier.

» **THE BIG GET BIGGER.** Here's a comparison for you based on those numbers: The total doors among the Big Three (Hancock Park's FHI and Omni, 2nd Wind Exercise, and Scott Egbert's group) last year came to 224. This year, the number for those three alone came to 277—a jump of 53. That represents all but eight of the total increase in specialty stores over the year-ago numbers. 2nd Wind leapfrogged its count up 46 to 102—now about quadruple what it was three years ago. Egbert pushed his count up 13 to 61, nearly triple what it was three years ago. On the other hand, Hancock Park's fitness stores under the FHI and Omni Fitness umbrellas dropped a couple of notches but remained the overall largest group. In the next year, something has to give, and we (continued on page 3)



» Downtime in a Distraction Derby



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So what does all that have to do with downtime?

Not much, other than it highlights the fact that in our effort to ensure you are connected, we've forgotten to remind you to disconnect too. A Fast Company magazine article cited a Day-Timers survey finding instant communications technology is actually making

it harder, not easier, to get things done. Those who reported feeling productive dropped from 83 percent in 1994 to less than 51 percent in 2006. As the article's author, Joe Robinson, wrote, "It's hard to perform in a 24/7 distraction derby that constantly disrupts focus and feeds an epidemic of false urgency."

When was the last time you disconnected? When was the last time you let your mind wander aimlessly, just enjoying the moment? There is nothing wrong with working hard—but only if you also disconnect hard, have good fun, and spend quality time with family and friends. You need it, and we need it. So our challenge this year to everybody, including ourselves, is to find downtime in today's distraction derby.



Thanks for being a part,

Therese Iknoian and Michael Hodgson
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think there will be realignments among this group—but not before they take on more doors or new cities.

» **SMALLER FOLKS BUTTON UP.** With up and down sales at specialty this year, depending on the region, others mostly stuck to the status quo, relocating stores and generally using the year to stabilize. Take out acquisitions or sales, and you'll find only a few onesie and twosie additions. Many promised bigger news in 2007. But we're taking a wait-and-see stance.

» **GONE BUT NOT FORGOTTEN.** Then there are those that departed our ranks in 2006. Bergen Fitness suddenly shuttered all five of its stores and declared Ch. 7 bankruptcy liquidation in October 2006. The Sanders brothers sold their five "The Fitness Store" shops to G&G Fitness and left the industry.

» **IT'S ALL IN A NAME.** With a Midwestern battle shaping up over territories, Dick Enrico moved into what was known as Scott Egbert's stomping grounds in Chicago, and Egbert said touché and moved into Enrico's headquarter state of Minnesota, starting the march with the purchase of Push Pedal Pull's four Minnesota stores in October. Egbert also added six stores in Wisconsin. That made his Illinois Fitness Experts name

(what The Fitness Experience stores he had acquired had become) superfluous, so most of those became Chicago Home Fitness.

» **SPORTING'S GOODS.** We have to mention the final collapse of Copeland's, as it declared bankruptcy mid-year (again), held fire sales, and The Sports Authority group snapped up the assets of many of the locations. We zapped it from our chart since it was basically gone although technically it was doing business until early January. Dick's Sporting Goods announced in mid-2006 that it plans to triple its size in the next eight years, shooting for 15-percent jumps in numbers each year. TSA also finished its transition to becoming a private company. And Sears, after a long and rough patch merging with Kmart to become Sears Holdings, is trying to find itself. These chains will begin going strongly head-to-head within each other's regions rather than sticking to their home turfs. And we think there may be some steps into specialty by sporting goods.

» **NORTH OF THE BORDER.** Although Canada is not part of our chart, we wanted to mention that Canada's nine-store Fitness Source was acquired by Forzani Group in February 2006, with plans announced for big expansion in 48 months. But no moves had yet been made by the end of the year. 🏠

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» SPECIALTY

Store	Address/Telephone	Website	States	Store Nos. 2006	Change from 2005
1) Hancock Park / Fitness Holdings Int'l... Corp HQ: 1000 North Studebaker, Long Beach, CA 90815, 562-296-1095 . hpcap.com			AK, AZ, CO, CA, CT, DE, MA, NH, NJ, NY, NV, PA, RI, WA	114	down 6
» After acquiring at a breathtaking pace for two years, Hancock Park (and its company FHI) took 2006 to sit back and stabilize, closing a few doors on lease expirations and realigning locations.					
• Busy Body Home Fitness	1000 North Studebaker, Long Beach, CA 90815, 562-296-1095	busybody.com	AK, AZ, CO, CA, NV, WA	57	down 5
• Omni Fitness	60 Oxford Dr., Moonachie, NJ 07074, 201-334-1102	omnifitness.com	CT, DE, MA, NH, NJ, NY, PA, RI	44	down 1
• LA Gym Equipment	1000 North Studebaker, Long Beach, CA 90815, 562-296-1095	lagymequipment.com	CA	13	0
2) 2nd Wind Exercise Equipment	7585 Equitable Dr., Eden Prairie, MN 55344, 952-544-5249	2ndwindexercise.com	IL, IN, IA, MN, MO, ND, NE, SD, WI	102	up 46
» The Enrico Empire Strikes: Moving like a thundering herd into the Chicago area where half of its new doors were, 2nd Wind has upped the ante in the Midwest, also adding stores in two new states.					
3) Home Fitness Group / Scott Egbert			IL, IN, MI, MN, OH, UT, WA, WI	61	up 13
» The Egbert Empire Strikes: The Midwest battle could become E vs. E, as Egbert's lineup of stores consolidated Illinois' Fitness Experts under the CHF name, added Wisconsin and Minnesota stores and could be sizing up its next move.					
• Chicago Home Fitness	1205 Butterfield Rd., Downers Grove, IL 60515, 630-725-9100	chicagohomefitness.com	IL, IN	26	up 10
• Fitness Experts	1205 Butterfield Rd., Downers Grove, IL 60515, 630-824-0139	fitnessexperts.com	MI	5	down 7
• American Home Fitness	600 West Maple, Troy, MI 48064, 248-720-2550	americanhomefitness.com	MI, OH	14	up 1
• North Star Home Fitness	1935 Beam Ave., Maplewood, MN 55109, 651-748-0126	northstarhomefitness.com	MN	6	up 6
• Northern Home Fitness	1306 S. 108th St., West Allis, WI 53214, 414-476-5030	northernhomefitness.com	WI	3	up 3
• Precor Home Fitness	15400 N.E. 20th St., Bellevue, WA 98007, 425-603-0400	precorhomefitness.com	WA	4	0
• Utah Home Fitness	10875 S. State St., Sandy, UT 84070, 801-816-1900	utahhomefitness.net	UT	3	0
4) Gym Source	40 E. 52nd St., New York, NY 10021, 212-688-4222	gymsource.com	CT, FL, MA, MD, NJ, NY, PA, RI, VA	28	up 2
» Gym Source has crept up a couple, including adding a store in Virginia, and it has begun planning its Western region entry with an Arizona operations center.					
5) Fitness Resource	2721 Dorr Ave., Fairfax, VA 22031, 703-849-8300	fitnessresource.com	VA, MD, GA	24	0
» Not wavering from its Southeast focus, Fitness Resource always takes small, calculated steps. Its hopes to add a couple in '06 didn't happen after three in '05, but '07 may see new doors. (continued)					



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» **SPECIALTY** (continued)

Store	Address/Telephone	Website	States	Store Nos. 2006	Change from 2005
6) FitCorp USA	Corp HQ: 2330 Apollo Circle, Carrollton, TX 75006, 972-416-7200	fitcorpusa.com	TX	21	0
» After acquiring Fitness Headquarters and closing a couple of Fitness In Motions in 2005, 2006 became a quiet period for the company to re-stabilize. A couple more doors are planned for the middle of 2007.					
• Fitness Headquarters		fitnessheadquarters.com	TX	8	0
• Busy Body		busybodytx.com	TX	7	0
• Fitness In Motion		fitnessinmotiontx.com	TX	6	0
7) Busy Body / Gyms To Go	910 S.W. 2nd Place, Pompano Beach, FL 33069, 954-781-1787	gymstogo.com	FL, GA	19	up 2
» With an unwavering focus on hitting 20 stores in 2006, one store was delayed, ultimately leaving the group at 19 at year's end. But it has been and will be making up for that with more plans in 2007.					
8) Leisure Fitness	316 Markus Court, Newark, DE 19713, 302-266-0624	leisurefitness.com	DE, MD, NJ, VA, PA	17	up 2
» Continuing its slow-and-steady-wins-the-race growth plan, Leisure Fitness again added just a couple of stores and will likely continue on that track this year.					
9) G&G Fitness	7350 Transit Rd., Williamsville, NY 14221, 716-983-1448	livefit.com	NY, OH, PA	17	up 5
» Picking up Ohio's The Fitness Store, G&G grew in one swoop by nearly 50 percent. It also closed one G&G, but rebalanced by opening another in New York.					
10) Total Fitness	274 Nutmeg Road South, South Windsor, CT 06074, 860-282-1849	totalfitnessequipment.com	CT, MA, NH, NY	14	up 1
» Total Fitness (both north and south divisions) is another specialty retailer that had a relatively stabile 2006, only adding one store in Massachusetts.					
11) Eclat Inc.	Corp HQ: 10516 Old Katy Rd., Ste. A, Houston, TX 77043, 832-358-1702		TX	13	up 2
» Continuing its use of multiple store brands, the company added one Fitness Unlimited and an entirely new store concept called Pre-Owned Fitness, where trade-in equipment from all stores are centralized for sale.					
• Busy Body of Houston		bbhouston.com	TX	5	0
• Fitness Unlimited		fitnessunlimited.net	TX	6	up 1
• Pre-Owned Fitness		preownedfitness.com	TX	1	up 1
• Winston Fitness		winstonfitness.com	TX	1	0
12) Superior Fitness Systems	1212 A-D Graphic Court, Charlotte, NC 28206, 704-342-0111	superiorfitness.com	NC, SC, VA	13	up 2
» Superior held true to its promise last year to round out its numbers to a dozen, but eventually even one-upped that to a baker's dozen as the Southeastern market heats up.					

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» **SPECIALTY** (continued)

Store	Address/Telephone	Website	States	Store Nos. 2006	Change from 2005
13) HEST Fitness	4730 S.P.I.D, Corpus Christi, TX 78411, 361-814-4378	hestfitness.com	TX	12	up 1
» Opening its first new store (Houston) in the last year since a string of three in 2003, HEST finished the year as it began, but will see really big changes in 2007 with new ownership.					
14) Push Pedal Pull	3110 W 12th St, Sioux Falls, SD 57104, 605-334-7740	pushpedalpull.com	ND, SD, NE, IA, OK, NM	10	down 4
» Selling off its four Minnesota stores to Scott Egbert, Push Pedal Pull dropped to 10, but has plans to grow just a bit in 2007. Perhaps the plans for Omaha additions last year that didn't happen will now.					
15) HealthStyles	P.O. Box 1934, Glenwood, CO 81602, 970-928-9345	healthstyleexercise.com	CO	10	0
» The plans to grow a bit in 2006 didn't materialize as the store focused on moving/expanding one store, but one more will be on tap for 2007.					
16) Precision / International Fitness	Corp HQ: 7080 W. State Road 84, Davie, FL 33317, 954-962-9119	precisionfiteq.com	AZ, FL, PR	9	up 1
» Although the Florida-based Nautilus chain held mostly steady in 2006, it seems to be re-grouping a bit. We know 2007 started with changes (e.g. AZ club attached to store closed) and we believe there will be more.					
• Nautilus of Florida/Precision Fitness . 7080 W. State Road 84, Davie, FL 33317, 954-693-4990 nautilusfl.com FL 7 up 1					
• Nautilus of Arizona 6170 W. Chandler Blvd., Chandler, AZ 85226, 480-786-3062 nautilusaz.com AZ 1 0					
• Nautilus of Caribbean 380 Juan Calaf, Ste. 11, Hato Rey, PR 00918, 787-767-2566 nautiluscaribbean.com PR 1 0					
17) All About Fitness / Lifestyle Fitness	Corp HQ: 7300 Sagebrush, Parker, CO 80134, 303-841-1641		KS, OK, NC	8	up 1
» These numbers don't include co-ownership as of Jan. 1, 2007, of U.S. Fitness Products' three stores. Some growth has and will happen there, as it will in commercial business, but numbers of stores won't spike.					
• All About Fitness 9128 Marshall Dr., Lenexa, KS 66215, 913-310-0990 aafitness.net KS 3 0					
• Lifestyle Fitness Equipment 800 Clanton Rd., Ste. R, Charlotte, NC 28217, 704-521-1448 lifestylefitequip.com NC, OK 5 up 1					
18) Fitness Systems	210 Gothic Court, Franklin, TN 37067, 615-771-4806	fitnesssystemsinc.com	AL, FL, KY, TN	8	0
» Tennessee could still see some runoff as Southern markets get hotter, and Fitness Systems – sticking to status quo in 2006 – foresees some steps in 2007, including stores and other marketing avenues.					
19) Fitness Showcase	1221 W. 103rd St., Kansas City, MO 64114, 816-942-9300	fitness-showcase.com	AR, IL, MO	7	0
» After a lot of changes in 2005, Fitness Showcase stayed the course in 2006 (with 7 stores and its warehouse) and likely will do the same in the coming year, staying true to its Midwest focus.					

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» **SPECIALTY** (continued)

Store	Address/Telephone	Website	States	Store Nos. 2006	Change from 2005
20) Nellie's Fitness	2410 Wardlow Rd., Ste. 103, Corona, CA 92880, 951-371-6511	nellies.com	CA	6	0
» Although solidly in the shadow of Busy Body in Southern California, Nellie's isn't far from two decades in business. It may consider more doors in 2007.					
21) Fitness Expo	4124 Veterans Blvd., Metairie, LA 70002, 504-887-0880	fitnessexpstores.com	LA, MS	5	0
» Still struggling with the continuous rebuilding of post-Katrina Louisiana, Fitness Expo says store numbers aren't as key as is reaching out to customers in a broader area for higher store volumes.					
22) Fitness Outlet	13407 N.E. 20th St., Bellevue, WA 98005, 425-957-4707	thefitnessoutlet.com	CA, WA	5	0
» Fitness Outlet is one of the few that stays successful with two retail hubs hundreds of miles apart – two in California's capital city area and three in upscale Seattle, Wash., areas.					
23) Fitness Showrooms	4114 Sunrise Hwy, Oakdale, NY 11769, 631-244-7555	fitnessshowrooms.com	NY	5	0
» Using five stores as hubs, Fitness Showrooms serves the entire Tri-State area, reaching into CT and NJ and all of NY's boroughs too. Further expansion? You never know.					

» **SPORTING GOODS**

Store	Address	Website	Store Nos. 2006	Store Nos. 2005
1) Hibbett Sports (Nasdaq: HIBB)	451 Industrial Ln., Birmingham, AL 35211	hibbett.com	613	549
» 2006 marked Hibbett's 10th year on the Nasdaq, as well as its tremendous No. 77 ranking on Forbes magazine's 200 Best Small Companies list. Not bad for a little Southern sports store!				
2) The Sports Authority	1050 West Hampden Ave., Englewood, CO 80110	thesportsauthority.com	408	398
» The Sports Authority's days as a NYSE publicly traded company ended in May 2006 when investor group Leonard Green & Partners took the company private in a cash-and-debt deal worth \$1.3 billion.				
3) Big 5 Sporting Goods (Nasdaq: BGFV)	2525 East El Segundo Blvd., El Segundo, CA 90245	big5sportinggoods.com	343	324
» Starting with five army surplus stores in 1955, Big 5 has long since outgrown its name with full-line stores in 10 states. 4Q 2006 marked its 44th consecutive quarter of positive same-store sales.				
4) Dick's Sporting Goods (NYSE: DKS)	300 Industry Dr., RIDC Park West, Pittsburgh, PA 15275	dickssportinggoods.com	294	255
» Dick's CEO shared the company's plans at its annual meeting in June: Increase store numbers 15 percent each year with the goal of 800 total stores in eight years. Yup, ambitious. No argument there. (continued)				

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» **SPORTING GOODS** (continued)

Store	Address	Website	Store Nos. 2006	Store Nos. 2005
5) Olympia Sports	5 Bradley Dr., Westbrook, ME 04092	olympiasports.net	153	151
» Touting carefully planned marketing strategies for its service- and family-oriented sporting goods company, Northeast-centric Olympia Sports promises future growth.				
6) Dunham's Sports	5000 Dixie Highway, Waterford, MI 48329	dunhamssports.com	141	135
» Dunham's store sizes range widely from 5,000 to 40,000 square feet, depending on the market needs. It too plans to continue opening stores in new and established markets.				
7) Modell's Sporting Goods	498 7th Ave., New York, NY 10018	modells.com	132	127
» Considered the nation's oldest sporting goods retailer, the Modell family's Northeast-based chain now for the first time has a non-family member at the helm as president.				
8) Academy Sports and Outdoors	1800 N. Mason Rd., Katy, TX 77449	academy.com	94	86
» With a start in tires and army surplus, Academy added sporting goods to its product assortment in the early 1980s. Expansion plans include additional stores throughout the Southeastern region.				
9) MC Sports	3070 Shaffer S.E., Grand Rapids, MI 49512	mcsports.com	77	75
» With a long heritage in Michigan and slow growth over the years into other Midwest states, MC Sports has added two more states – Iowa and Kansas – to its roster.				
10) Sport Chalet (Nasdaq: SPCHA & SPCHB)	One Sport Chalet, La Canada, CA 91011	sportchalet.com	45	40
» Sport Chalet is opening about five stores per year, partly thanks to consumers ranking it as the No. 1 most-desired retailer in the 2006 Retail Demand Today Report by Kanbay Research Institute.				
11) G.I. Joe's	9805 Boeckman Rd., Wilsonville, OR 97070	gjoes.com	26	23
» In 2007, G.I. Joe's will expand into Idaho – a new state for the Northwest chain – and anticipates several new stores in western Washington and one in Redding, Calif., in the next three years.				
12) Scheels All Sports	3218 13th Ave. South, Fargo, ND 58103	scheelssports.com	22	22
» Scheels is replacing older, smaller stores with larger-than-life stores with mega product, mega entertainment and mega family appeal. 2008 plans include a 250,000-square-foot store in Sparks, Nev.				
13) Chick's Sporting Goods	979 Village Oaks Dr., Covina, CA 91724	chickssportinggoods.com	13	11
» Chick's is one of the dominant full-line retail sporting goods players in the Southern California area – selling at mid- to upper-price points with annual sales in excess of \$100 million.				

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» SPORTING GOODS (continued)

Store	Address	Website	Store Nos. 2006	Store Nos. 2005
14) Paiva	3308 North Mitthoeffer Rd., Indianapolis, IN 46235	paiva.com	13	0
» Launched in April 2006, Paiva is an up-and-coming women's subbrand of Finish Line. So far, it has stuck mostly to softgoods in its mall-based locations, but who knows what's coming.				
* Play It Again Sports (Nasdaq: WINA)	4200 Dahlberg Dr., Ste. 100, Minneapolis, MN 55422	playitagainsports.com	393	397
» A large franchise operation, PIA is important, but not a numbered part of our full list because store operators decide their own mix – not all stores offer fitness, while some do a substantial amount.				

» MASS RETAILERS

Store	Address	Website	Store Nos. 2006	Store Nos. 2005
1) Sears Holdings Corp. (Nasdaq: SHLD)	3333 Beverly Rd., Hoffman Estates, IL 60179	searsholdings.com	3,410*/U.S.	3,498**/U.S.
» 2006 marked the first full year of Sears and Kmart as a merged company under the Sears Holdings moniker. Cutting expenses has yielded strong cash flow, but weak sales still persist. *1,394/Kmart; 2,016/Sears. **1,426/Kmart; 2,072/Sears.				
2) Wal-Mart (NYSE: WMT)	702 Southwest 8th St., Bentonville, AR 72716	walmart.com	3,287/U.S.	3,189/U.S.
» The Company Sam Built is still the world's No. 1 retailer in sales, but uncharacteristic dips in same-store sales and bad publicity plagued Wal-Mart in 2006.				
3) Target (NYSE: TGT)	1000 Nicollet Mall, Minneapolis, MN 55403	target.com	1,494	1,397
» Lauded for delivering on its brand promise, "Expect more, and pay less," Target continues to strike gold and attract more fitness brands with its cheap chic approach.				
4) Costco Wholesale Corp. (Nasdaq: COST)	999 Lake Drive, Issaquah, WA 98027	costco.com	371	346
» FY06 net sales were up 14 percent over '05, reaching \$58.96 billion with a profit of \$1.10 billion. And big fitness brand names continue to show up in aisles because of customer demographics.				



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