

USA Gymnastics 2013 Survey of the Member Clubs

Conducted and reported by
David Holcomb

The 2013 USA Gymnastics Survey results are in. Over 200 gyms from across the USA responded. This is the fourth time that USA Gymnastics has conducted the survey and I hope the results prove to be both informative and helpful.

The purpose of the survey is to gain and provide general information about the gymnastics industry, develop industry standards, gauge how we are doing as the economy slowly improves, collect and share the best ideas from gyms across the USA, and to provide feedback on USA Gymnastics itself so they can better serve the needs of the Member Clubs across the USA.

The last two surveys identified increased education and training opportunities plus professional support as the most important things USA Gymnastics could do to help the clubs. USA Gymnastics responded by pouring resources into doing just that. According to the results from this survey the overwhelming majority of our Member Clubs appreciate (94%) are benefiting from those efforts.

The leadership at USA Gymnastics pays close attention to both the results and the comments. Many times they want to respond directly to those who ask questions or who have issues but cannot because of the confidentiality built into the survey results.

Your ideas are awesome! I am always impressed by the passion and thoughtfulness of the gym owners, managers, and coaches in our industry. Some of those ideas can be found in this report. However, with hundreds of gyms providing information, it is possible to include only a handful of those responses.

That is why a complete report containing virtually all of your responses, ideas and opinions will be sent to those who completed the survey.

Thank you again for your time and effort in responding to the 2013 Survey. It is my hope that the results prove to be both interesting and useful as you make decisions about programs, pricing, organization, and approaches.

Best wishes for a great year in gymnastics!

David Holcomb,
Founder and Owner, Buckeye Gymnastics,
Chair, USA Gymnastics Business Advisors

Basic Demographics

Information about the gym owner:

Gym owner male or female?	2013	2010	2006
Male	29%	41%	45%
Female	72%	59%	55%

Age of the gym owner:			
20-30	5%	3%	7%
30-40	22%	23%	25%
40-50	24%	37%	40%
50-60	32%	23%	23%
over 60	16%	14%	5%

College graduate:			
Yes	75%	73%	70%

Graduate or professional degree?			
Yes	36%	25%	23%

Was the owner a gymnast?			
Yes	71%	72%	78%

Was the owner an accomplished gymnast?			
Yes	31%	27%	34%

Does the owner manage the day-to-day operation of the gym?			
Yes	91%	86%	

How many gym owners spend time doing the following:

	2013	2010	
Coaching:	60%	64%	
Teaching:	42%	54%	
Front desk:	50%	49%	
Cleaning:	32%	46%	
Accounting:	87%	79%	

If the owner had it to do over again, would s/he still open a gym?

	2013	2010	2006
Yes	93%	90%	88%

Is the owner the highest paid employee of the gym?

Yes	70%	60%	61%
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On average, how many hours does the owner work in the gym each week?

Under 10	7%	4%	4%
10-15	4%	7%	3%
16-20	2%	4%	6%
21-25	2%	7%	9%
26-30	18%	6%	7%
31-35	11%	12%	16%
36-40	16%	22%	52%
over 40	42%	39%	2%

How much did the gym owner show as gym related income on their 2013 Federal Income Tax return or how much did the gym owner make in total gym compensation in 2013?

Under \$25,000	19%
\$25,001-\$40,000	10%
\$40,001-\$55,000	15%
\$55,001-\$70,000	7%
\$70,001-\$85,000	3%
\$85,001-\$100,000	8%
\$100,001-\$150,000	8%
150,001- \$200,000	3%
\$200,000- \$250,000	2%
Over \$250,000	8%

In 2009:

Under \$20,000	19%
\$20,001-\$30,000	14%
\$30,001-\$40,000	11%
\$40,001-\$50,000	10%
\$50,001-\$60,000	9%
\$60,001-\$70,000	6%
\$70,001-\$80,000	20%

Information about the gym

How many locations do you have?

	2013	2010	2006
1	83%	87%	86%
2	12%	7%	9%
3	1%	4%	3%
4 or more	1%	2%	

Do you own your building?

Yes	48%	47%	35%
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In what type of building do you operate?

	2013	2006
Single tenant, free-standing	50%	40%
Warehouse complex	5%	22%
Light industrial	7%	33%
Commercial building	15%	4%
Strip shopping center	5%	
Public Building: school, YMCA	5%	

Gym owners have made a significant move away from warehouses in industrial areas over the past seven years. Back in 2006 over half of all gyms (55%) were located in warehouse and light industrial buildings and areas. After all, these buildings were both large and inexpensive. Unfortunately, they also tended to be located in areas where children and families were not located. While the gym space might be more expensive in other types of buildings and areas it is highly likely that better locations can be found close to thriving communities that are full of kids wanting to take gymnastics.

Do you operate as a not-for-profit business?

No	88%	86%	95%
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Do you operate in a multi-sport building complex (exclude cheer, dance, trampoline, and other traditional gymnastics related programs)?

Yes	31%	26%	30%
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What programs do you offer?

Gymnastics instruction	100%
Birthday parties	92%
Team: gymnastics	92%
Private lessons	89%
Summer camps	75%
Open gym	68%
Holiday camps	55%
Non-select recreation team	50%
Cheerleading	43%
Competition team camps	39%
Special Needs	33%
Dance	32%
Fitness	25%
Team: cheerleading	22%
Team: TNT	20%
Martial arts	17%
Swimming: Outdoor pool	7%
Swimming: Indoor pool	4%

It is interesting that cheerleading has dropped both as a program and as a competition team offered by gymnastics schools. Cheer is a tough business and competition is often fierce driving down what a gym can charge for the training. Maybe that is why fewer gyms are offering it. Meanwhile there are more gyms offering TNT teams. The percentage of gyms having and offering swimming has also dropped.

Enrollment January 2013:

Small gym	under 325 students
Medium gym	325-650
Large gym	over 650 students

Enrollment January 2010:

Small gym	under 350 students
Medium gym	351-720
Large gym	over 720 students

Enrollment 2006:

Small gym	under 300 students
Medium gym	301-650
Large gym	over 650 students

Enrollment by program:

	Overall	Large	Med	Small
Preschool	32%	33%	29%	29%
Rec classes	45%	47%	50%	51%
Team	12%	11%	14%	18%
Cheer	11%	9%	7%	8%

Year of Peak Enrollment?

75% of the gym reported their highest enrollment ever to be in the past two years. 90% report their highest enrollment year in the years since 2009 and the financial slow down.

This means that only 10% of the gyms had their highest enrollment prior to the financial meltdown and the great recession.

This result says a great deal about the value that families place on the children's sports, recreation, fitness, and education in general and the support that our gymnastics school have within the communities we serve specifically.

How "BIG" is your gym? Three ways to measure gym size.

How many kids? Enrollment:

Small gym	under 325 students
Medium gym	325-650
Large gym	over 650 students

Enrollment by program:

	Overall	Large	Med	Small
Preschool	32%	33%	29%	29%
Rec classes	45%	47%	50%	51%
Team	12%	11%	14%	18%
Cheer	11%	9%	7%	8%

How large is your gym?

Small	up to 10,000 sq/ft	29%
Medium	10,000-15,999 sq/ft	39%
Large	over 16,000 sq/ft	33%

Most common size: 10,000 sq/ft 8%
National average gym size: 15,000 sq/ft

What is your annual gross gym income?

Small	under \$300,000	34%
Medium	\$300,000- \$850,000	30%
Large	over \$850,000	36%

National average gross income: \$765,000
30% reported annual gross income at over 1 million.
7% reported annual income under \$100,000.

What an "Average" gym looks like:

Small Gym*: up to 10,000 sq/ft gym
up to 325 students
bringing in up to \$300,000 a year

Medium Gym*: 10,000 to 16,000 sq/ft gym
between 325 & 650 students
bringing in between \$300 & \$850K

Large Gym*: over 16,000 sq/ft gym
over 650 students
bringing in over \$850K

* Fewer than 50% of the gyms stayed in the same classification across all three measurements used here.

Small Gym (using annual gross revenue)

Average gym size	9,560 sq/ft
Average enrollment	212
Average annual income	\$148,000
Avg. rent/mortgage per square foot	\$4.47
Avg. facilities cost (rent + utilities) as a Percentage of gross	33%
Avg. income per square foot	\$21.40
Own building:	31%
Percentage of owners making:	
Under \$25,000	52%
\$25K-\$55K	33%
\$55-\$100	3%
over \$100K	12%

Medium Gym (using annual gross revenue)

Average gym size	17,332 sq/ft
Average enrollment	533
Average annual income	\$534,300
Avg. rent per square foot	\$8.40
Avg. facilities cost (rent + utilities) as a percentage of gross	33%
Avg. income per square foot	\$30.83
Own building:	42%
Percentage of owners making:	
Under \$25,000	15%
\$25K-\$55K	41%
\$55-\$100	37%
over \$100K	7%

Large Gym (using annual gross revenue)

Average gym size	20,280 sq/ft
Average enrollment	1,243
Average annual income	\$1,650,000
Avg. mortgage per square foot	\$5.71
Avg. facilities cost (mortgage + utilities + taxes) as a percentage of gross	9.4%
Avg. income per square foot	\$83.80
Own building:	82%
Percentage of owners making:	
Under \$25,000	6%
\$25K-\$55K	9%
\$55-\$100	29%
over \$100K	57%

Program Information

How do you organize and enroll your students?

Monthly	47%
8 week sessions	18%
9 week sessions	5%
10 week sessions	9%
11-13 week sessions	11%
over 13 weeks	4%

If you charge an annual membership or registration fee what is it?

No fee:	7%
\$20	10%
\$25	15%
\$30	14%
\$35	18%
\$40-\$45	29%
\$50	7%
Over \$50	7%

Preschool Gymnastics:

Average teaching ratio: 6.3	2013	2010
5:1	9%	
6:1	59%	80%
7:1	19%	8%
8:1	10%	4%

Some clubs had different ratios for different age groups.

Average class length: 48.5 Minutes

	2013	2010
40 min.	4%	8%
45	52%	55%
50	17%	9%
55	10%	
60	12%	18%

Average cost per class: \$15.41 \$14.00

2013 avg cost per hour: \$19.33
2010 Avg. cost per hour: \$18.66
2006 avg. cost per hour: \$18.63

2013 Avg cost per minute: \$0.32

2013 Average cost for Preschool Classes:

40 min	\$12.89
45	\$14.50
50	\$16.11
55	\$17.72
60	\$19.33

Discounts offered	2013	2010
Multiple classes	78%	86%
Sibling	77%	84%
Early pay	8%	16%
Active duty military	4%	

School-age Beginning Levels Rec Program:

Average teaching ratio: 8.3

	2013	2010
6:1	3%	
7:1	7%	14%
8:1	55%	58%
9:1	20%	16%
10:1	14%	

2013 Rec Classes Average Class Length: 63

	2013	2010
45 min.	0%	3%
50	2%	
55	15%	17%*
60	62%	67%
65	2%	3%
70	2%	
75	7%	
90	7%	3%

* The 17% figure for 2010 was for 50-55 min. classes

2013 Average cost per class: \$17.50

2010 Average cost per class: \$16 per class

2013 Avg cost per hour: \$16.59
2010 Avg cost per hour: \$15.40
2006 Avg. cost per hour 2006: \$12.83

2013 Average cost per minute: \$0.28

Average cost for Beginner Recreation Classes:

50 min	\$13.82
55	\$15.20
60	\$16.59
65	\$17.97
75	\$20.73
90	\$24.88

Discounts offered	2013	2010
Multiple classes	81%	86%
Sibling	78%	86%
Early Pay	7%	
Active Duty Military	3%	

Team Hours and Tuition: National averages

2013	Hrs/wk	tuition	tuition/hr
Level 3	7.5	\$178	\$6.03
Level 4	10	\$211	\$5.25
Level 5	11.5	\$223	\$4.96
Level 6	13.5	\$245	\$4.49
Level 7	15.5	\$272	\$4.33
Level 8	16	\$278	\$4.30
Level 9	18	\$279	\$4.14
Level 10	19	\$300	\$3.91
XCEL	8.5	\$179	\$5.24

2010	Hrs/wk	tuition	tuition/hr
Level 3	4	\$160	\$10.00
Level 4	6	\$196	\$8.17
Level 5	8.5	\$231	\$6.79
Level 6	11	\$233	\$5.30
Level 7	13	\$260	\$5.00
Level 8	15	\$268	\$4.47
Level 9	16.5	\$280	\$4.24
Level 10	17.5	\$288	\$4.11

2006	Hrs/wk	tuition	tuition/hr
Level 4	6.13	\$150	\$6.64
Level 5	8.67	\$176	\$5.20
Level 6	11.1	\$200	\$4.54
Level 7	13.6	\$217	\$4.12
Level 8	14.8	\$227	\$3.89
Level 9	16.5	\$248	\$3.84
Level 10	17.97	\$285	\$4.08

Staff Information:

What do you pay entry-level team coaches per hour?

Under \$8.00/hr	4%
\$8.00-\$9.00	7%
\$9.01-10.00	16%
\$10-11.00	23%
\$11-\$12.50	15%
\$12.50-\$15.00	22%
\$15-\$17.50	8%
\$17.50-\$20	1%
Over \$20.00/hr	0%

What do you pay experienced team coaches per hour?

Under \$8.00/hr	1%
\$8.00-\$9.00	2%
\$9.01-10.00	2%
\$10-11.00	3%
\$11-\$12.50	10%
\$12.50-\$15.00	25%
\$15-\$17.50	19%
\$17.50-\$20	17%
Over \$20.00/hr	16%

What do you pay entry-level class/rec teachers per hour?

Under \$8.00/hr	11%
\$8.00-\$9.00	42%
\$9.01-10.00	19%
\$10-11.00	13%

\$11-\$12.50	8%
\$12.50-\$15.00	3%
\$15-\$17.50	1%
\$17.50-\$20	1%
Over \$20.00/hr	1%

What do you pay experienced class/rec teachers per hour?

Under \$8.00/hr	2%
\$8.00-\$9.00	4%
\$9.01-10.00	10%
\$10-11.00	20%
\$11-\$12.50	13%
\$12.50-\$15.00	31%
\$15-\$17.50	14%
\$17.50-\$20	4%
Over \$20.00/hr	2%

Benefits offered to full-time employees:

401K	25%
Health Insurance	54%
Common contribution,	60-90%
Vacation days	67%
Sick Days	43%
Personal Days	35%
Dental/vision	31%
Bonus	66%

Paid Time Off: Vacation, sick, and personal days:

Many of the gyms that offer paid time off provide a total number of paid days off that employees can use as they want to with no distinction as to what it is used for.

Part Time Benefits: (Not common):

401K or similar:	13%
Health Insurance:	18%
Paid Days off:	39%
dental	20%

The Economy

Comparing your enrollment now with your enrollment in 2007, before the recession:

Much higher	38%
Higher	34%
About the same	18%
Lower	8%
Much lower	3%

From 2010: Comparing your enrollment now with your enrollment in 2007, before the recession:

Much higher	11%
Higher	21%
About the same	28%
Lower	32%
Much lower	7%

Comparing your enrollment now with your enrollment in 2011-2012, before the 2012 Olympics Games, is your enrollment:

Much higher	21%
Higher	54%
About the same	18%
Lower	7%
Much lower	0%

Programs that are doing well for your gym:

These results are all over the place. It depends on the gym and there are no trends that I can discern except one: teams are doing well. This might come as a surprise since team tend to be a gym's highest priced program because of the greater number of training hours involved. And yet team programs are thriving. Parents may sacrifice for their families during hard economic times but they fight hard to pay for their kid's sports.

Programs that are not doing so well:

Once again it depends mostly on the individual gym but one trend is surprisingly strong: preschool enrollment is down across the country. So is cheerleading. Is this decline based on the economy or could it be increased competition for those preschool dollars? Or the increase in the number and professionalism of the cheer gyms?

Best Ideas for Increasing revenue*

Stepping up our Social Media!! Lots of in house marketing! Word of mouth. Advertising in all the area zipcode magazines. For example, check out "92127 magazine in San Diego" We advertise in 8 zip code areas near our gym. We have the most talented and enthusiastic staff ever!!

All staff are "PICS" -- people in charge of something -- Camps, birthday parties, team, demo team, Motion Evolution, safety and maintenance, preschool, school-age, Character Counts, Mobile Program, Gym Plus, retail shop, etc. etc. All report to our amazing Program Director.

We have been steadily raising prices with no adverse impact on class sizes, in fact they are all bigger today than in previous years. We are doing email blasts of former students alerting them to new classes and/or registration date information.

We ran a living social deal with our camp program and rec classes two years ago. This brought in a lot of prospective clients at only 1/4 of the regular rate. This past year we offered all of our living social customers from the year before a 25% discount for signing up for a camp which brought us a new camp revenue increase of \$112,000 over 10 weeks. Not including our regular clients. Out of those customers we also offered one free month with payment of a full month. We increased our rec enrollment by 325 students and have retained all but 17 of them over this past year.

Provide community outreach programs. Free month coupons to try our program with a \$25 registration Fee. They must sign up for classes in order to use it.

* We print five great ideas here, but those who completed the survey receive all the Best Ideas (over 50!) and all of the information. Many thanks to all who completed the survey. The more who respond (once every 3-4 years!) The better the results and the more valuable info we can provide to you!