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 forth 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, gage 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:

<table>
<thead>
<tr>
<th>Question</th>
<th>2013</th>
<th>2010</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gym owner male or female?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>29%</td>
<td>41%</td>
<td>45%</td>
</tr>
<tr>
<td>Female</td>
<td>72%</td>
<td>59%</td>
<td>55%</td>
</tr>
<tr>
<td>Age of the gym owner:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20-30</td>
<td>5%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>30-40</td>
<td>22%</td>
<td>23%</td>
<td>25%</td>
</tr>
<tr>
<td>40-50</td>
<td>24%</td>
<td>37%</td>
<td>40%</td>
</tr>
<tr>
<td>50-60</td>
<td>32%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>over 60</td>
<td>16%</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>College graduate:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>75%</td>
<td>73%</td>
<td>70%</td>
</tr>
<tr>
<td>Graduate or professional degree?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>36%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Was the owner a gymnast?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>71%</td>
<td>72%</td>
<td>78%</td>
</tr>
<tr>
<td>Was the owner an accomplished gymnast?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>31%</td>
<td>27%</td>
<td>34%</td>
</tr>
<tr>
<td>Does the owner manage the day-to-day operation of the gym?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>91%</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td>How many gym owners spend time doing the following:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coaching</td>
<td>60%</td>
<td>64%</td>
<td></td>
</tr>
<tr>
<td>Teaching</td>
<td>42%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Front desk</td>
<td>50%</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>Cleaning</td>
<td>32%</td>
<td>46%</td>
<td></td>
</tr>
<tr>
<td>Accounting</td>
<td>87%</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>If the owner had it to do over again, would s/he still open a gym?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>93%</td>
<td>90%</td>
<td>88%</td>
</tr>
<tr>
<td>Is the owner the highest paid employee of the gym?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>70%</td>
<td>60%</td>
<td>61%</td>
</tr>
<tr>
<td>On average, how many hours does the owner work in the gym each week?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under 10</td>
<td>7%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>10-15</td>
<td>4%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>16-20</td>
<td>2%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>21-25</td>
<td>2%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>26-30</td>
<td>16%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>31-35</td>
<td>11%</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>36-40</td>
<td>16%</td>
<td>22%</td>
<td>52%</td>
</tr>
<tr>
<td>over 40</td>
<td>42%</td>
<td>39%</td>
<td>2%</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $25,000</td>
<td>19%</td>
</tr>
<tr>
<td>$25,001-$40,000</td>
<td>10%</td>
</tr>
<tr>
<td>$40,001-$55,000</td>
<td>15%</td>
</tr>
<tr>
<td>$55,001-$70,000</td>
<td>7%</td>
</tr>
<tr>
<td>$70,001-$85,000</td>
<td>3%</td>
</tr>
<tr>
<td>$85,001-$100,000</td>
<td>8%</td>
</tr>
<tr>
<td>$100,001-$150,000</td>
<td>8%</td>
</tr>
<tr>
<td>$150,001-$200,000</td>
<td>3%</td>
</tr>
<tr>
<td>$200,001-$250,000</td>
<td>2%</td>
</tr>
<tr>
<td>Over $250,000</td>
<td>8%</td>
</tr>
</tbody>
</table>

In 2009:

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $20,000</td>
<td>19%</td>
</tr>
<tr>
<td>$20,001-$30,000</td>
<td>14%</td>
</tr>
<tr>
<td>$30,001-$40,000</td>
<td>11%</td>
</tr>
<tr>
<td>$40,001-$50,000</td>
<td>10%</td>
</tr>
<tr>
<td>$50,001-$60,000</td>
<td>9%</td>
</tr>
<tr>
<td>$60,001-$70,000</td>
<td>6%</td>
</tr>
<tr>
<td>$70,001-$80,000</td>
<td>20%</td>
</tr>
</tbody>
</table>

Information about the gym

How many locations do you have?

<table>
<thead>
<tr>
<th>Year</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4 or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>83%</td>
<td>12%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>2010</td>
<td>87%</td>
<td>7%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>2006</td>
<td>86%</td>
<td>9%</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Do you own your building?

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>48%</td>
</tr>
<tr>
<td>2010</td>
<td>47%</td>
</tr>
<tr>
<td>2006</td>
<td>35%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Year</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>88%</td>
</tr>
<tr>
<td>2010</td>
<td>86%</td>
</tr>
<tr>
<td>2006</td>
<td>95%</td>
</tr>
</tbody>
</table>

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.

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.
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
5:1 2013 2010 9% 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
40 min. 2013 2010 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: $18.83

2013 Avg cost per minute: $0.32

2013 Average cost for Preschool Classes:
- 40 min: $12.89
- 45 min: $14.50
- 50 min: $16.11
- 55 min: $17.72
- 60 min: $19.33

Discounts offered:
- 2013
  - Multiple classes: 78%
  - Sibling: 77%
  - Early pay: 8%
  - Active duty military: 4%
- 2010
  - Multiple classes: 86%
  - Sibling: 85%
  - Early pay: 16%
  - Active duty military: 16%

School-age Beginning Levels Rec Program:
Average teaching ratio: 8.3

2013 2010
6:1 3% 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 min: 2% 7%
55 min: 15% 17%
60 min: 62% 66%
70 min: 2% 3%
75 min: 7% 5%
90 min: 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: $12.83

2013 Average cost per minute: $0.28

Average cost for Beginner Recreation Classes:
- 50 min: $13.82
- 55 min: $15.20
- 60 min: $16.59
- 65 min: $17.97
- 75 min: $20.73
- 90 min: $24.88

Discounts offered:
- 2013 2010
  - Multiple classes: 81% 86%
  - Sibling: 78% 86%
  - Early Pay: 7% 8%
  - Active Duty Military: 3%

Team Hours and Tuition: National averages

<table>
<thead>
<tr>
<th>Level</th>
<th>2013 Hrs/wk</th>
<th>Tuition</th>
<th>Tuition/hr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 3</td>
<td>7.5</td>
<td>$178</td>
<td>$6.03</td>
</tr>
<tr>
<td>Level 4</td>
<td>10</td>
<td>$211</td>
<td>$5.25</td>
</tr>
<tr>
<td>Level 5</td>
<td>11.5</td>
<td>$223</td>
<td>$4.96</td>
</tr>
<tr>
<td>Level 6</td>
<td>13.5</td>
<td>$245</td>
<td>$4.49</td>
</tr>
<tr>
<td>Level 7</td>
<td>15.5</td>
<td>$272</td>
<td>$4.33</td>
</tr>
<tr>
<td>Level 8</td>
<td>16</td>
<td>$278</td>
<td>$4.30</td>
</tr>
<tr>
<td>Level 9</td>
<td>18</td>
<td>$279</td>
<td>$4.14</td>
</tr>
<tr>
<td>Level 10</td>
<td>19</td>
<td>$300</td>
<td>$3.91</td>
</tr>
<tr>
<td>XCEL</td>
<td>8.5</td>
<td>$179</td>
<td>$5.24</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Level</th>
<th>2010 Hrs/wk</th>
<th>Tuition</th>
<th>Tuition/hr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 3</td>
<td>4</td>
<td>$160</td>
<td>$10.00</td>
</tr>
<tr>
<td>Level 4</td>
<td>6</td>
<td>$196</td>
<td>$8.17</td>
</tr>
<tr>
<td>Level 5</td>
<td>8.5</td>
<td>$231</td>
<td>$6.79</td>
</tr>
<tr>
<td>Level 6</td>
<td>11</td>
<td>$233</td>
<td>$5.30</td>
</tr>
<tr>
<td>Level 7</td>
<td>13</td>
<td>$260</td>
<td>$5.00</td>
</tr>
<tr>
<td>Level 8</td>
<td>15</td>
<td>$268</td>
<td>$4.47</td>
</tr>
<tr>
<td>Level 9</td>
<td>16.5</td>
<td>$280</td>
<td>$4.24</td>
</tr>
<tr>
<td>Level 10</td>
<td>17.5</td>
<td>$288</td>
<td>$4.11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Level</th>
<th>2006 Hrs/wk</th>
<th>Tuition</th>
<th>Tuition/hr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 4</td>
<td>6.13</td>
<td>$150</td>
<td>$6.64</td>
</tr>
<tr>
<td>Level 5</td>
<td>8.67</td>
<td>$176</td>
<td>$5.20</td>
</tr>
<tr>
<td>Level 6</td>
<td>11.1</td>
<td>$200</td>
<td>$4.54</td>
</tr>
<tr>
<td>Level 7</td>
<td>13.6</td>
<td>$217</td>
<td>$4.12</td>
</tr>
<tr>
<td>Level 8</td>
<td>14.8</td>
<td>$227</td>
<td>$3.89</td>
</tr>
<tr>
<td>Level 9</td>
<td>16.5</td>
<td>$248</td>
<td>$3.84</td>
</tr>
<tr>
<td>Level 10</td>
<td>17.97</td>
<td>$285</td>
<td>$4.08</td>
</tr>
</tbody>
</table>

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%
Olympics Games, is your enrollment:

Comparing your enrollment in 2011 with your enrollment in 2007, before the recession:

From 2010:

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, 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 zip code 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. 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!