2010 GYMNASTICS and CHEERLEADING Industry - Annual BUSINESS Survey

Compiled by 3rd Level Consulting – Frank Sahlein, President – April 2010

Survey Comments and Disclaimer

PARTICIPATION – **182 owners**, representing **262 facilities** (multiple sites) participated in the 2010 Gymnastics and Cheerleading Industry Survey.

OBJECTIVES – Our objectives in conducting this Survey, and all future surveys, are simple.

- To help eliminate some of the "guesswork" in the industry with respect to critical trends.
- To increase the level and depth of professionalism within the industry.
- To ultimately increase the value of businesses for owners.

THANKS - Please accept our sincere appreciation for your time and thoughts. Without your active participation, no useful information can be gathered!

SUPPORT – **Thanks are due to USA Gymnastics, Gymnastics Ontario (Canada), and Inside Gymnastics / Inside Cheerleading Magazine**, along with several of our vendor partners, for their assistance and ongoing support of these valuable surveys.

INDUSTRY SEGMENTATION – The business owners who respond to this Survey define themselves as **Gymnastics-centered Children's Activity Centers**, with varying degrees of additional Activity Programs in the areas of Sports Instruction, Entertainment and Education.

REPORT FORMAT – The overall Survey results will be sent to all who respond in full. More detailed reports will be made available to the respective associations and organizations that assisted in the distribution of the Survey to its' members.

ANALYSIS – The user can draw significant trend conclusions "by the numbers". More detailed analysis of the results will be conducted in the near future to determine the trends "beyond the numbers". These findings will be shared through newsletters, webinars, conferences, etc.

DISCLAIMER – The data contained in this, and all future Surveys, is compiled solely from the input by the respondents. No auditing or other verification was conducted on the raw data. Users of the data agree to hold 3rd Level, Inc., its Officers, Agents and other representatives free of any liability whatsoever.

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2010 GYMNASTICS and CHEERLEADING Business Trends Survey

1. Where are you located?

	Response Percent	Response Count
United States	**94.0%**	**171**
International	6.0%	11
	answered question	**182**
	skipped question	**0**

2. About YOU - Please tell us a little bit about yourself! These boxes are REQUIRED (except Address 2 and Phone) to receive the results of the survey, and before you can complete the survey. Your information will be kept 100% confidential, and will NOT be sold, passed on or distributed in any fashion. No individual names or business names are used in the survey results.

	Response Percent	Response Count
Name:	**100.0%**	**182**
Company:	**100.0%**	**182**
Address 1:	**100.0%**	**182**
Address 2:	8.8%	16
City/Town:	**100.0%**	**182**
State/Province:	99.5%	181
ZIP/Postal Code:	**100.0%**	**182**
Country:	**100.0%**	**182**
Email Address:	**100.0%**	**182**
Phone Number:	87.4%	159
	answered question	**182**
	skipped question	**0**

3. Your Web Site address?	
	Response Count
	169
answered question	**169**
skipped question	**13**

4. DEMOGRAPHIC INFO - Which would best describe the population area that your business operates in?		
	Response Percent	**Response Count**
Densely populated, high income	6.7%	12
Densely populated, medium income	14.4%	26
Densely popuated, low income	2.8%	5
Medium density, high income	12.8%	23
Medium density, medium income	**42.8%**	**77**
Medium density, low income	4.4%	8
Low density, high income	2.8%	5
Low density, medium income	8.3%	15
Low density, low income	5.0%	9
	Comments	27
answered question		**180**
skipped question		**2**

5. Corporate Form		Response Percent	Response Count
Non Profit		12.4%	22
Sole Proprietor		7.9%	14
C Corporation		10.7%	19
S Corporation		**39.0%**	**69**
LLC		21.5%	38
Partnership		0.6%	1
Not sure		7.9%	14
		Other/Comments	6
		answered question	**177**
		skipped question	**5**

6. EXPERIENCE and LONGEVITY - How long have you been a Business Owner in the industry?		Response Percent	Response Count
Less than 1 year		5.8%	10
1-3 years		12.7%	22
4-10 years		26.0%	45
10-20 years		**28.3%**	**49**
20-30 years		15.6%	27
30+ years		11.6%	20
		Comments	24
		answered question	**173**
		skipped question	**9**

7. INDUSTRY - Which best describes your PRIMARY activity of emphasis? (Generally, if 75% or more of your Gross Revenues are derived from one principle activity, that would be the Primary activity. If you have a balanced range of activity revenue streams, then you are by definition a Children's Activity Center)

	Response Percent	Response Count
Children's Activity Center model	13.5%	24
Gymnastics, Tumbling, Acrobatics	**60.7%**	**108**
Cheerleading	18.5%	33
Swimming	0.6%	1
Dance	1.7%	3
Martial Arts	0.0%	0
Education and Child Care	0.6%	1
Entertainment	0.0%	0
Mobile Program	2.2%	4
In Transition!	2.2%	4
	Comments	15
	answered question	**178**
	skipped question	**4**

8. PROGRAMS - What type of SPORTS INSTRUCTION Programs do you currently offer? Please check ALL that apply.

	Yes	No	Considering	Response Count
Preschool Gymnastics	**87.9% (131)**	10.1% (15)	2.0% (3)	149
Recreational Gymnastics, Tumbling, Acrobatics	**91.3% (137)**	7.3% (11)	1.3% (2)	150
Competitive Gymnastics	**71.9% (105)**	26.0% (38)	2.1% (3)	146
Youth Fitness Classes	35.7% (45)	27.0% (34)	**37.3% (47)**	126
Cheerleading	**64.9% (87)**	23.1% (31)	11.9% (16)	134
Swimming	13.0% (14)	**81.5% (88)**	5.6% (6)	108
Dance	**45.4% (54)**	41.2% (49)	13.4% (16)	119
Martial Arts	21.8% (24)	**60.0% (66)**	18.2% (20)	110
Private Lessons	**84.4% (119)**	14.2% (20)	1.4% (2)	141
Mobile Program	27.0% (30)	**63.1% (70)**	9.9% (11)	111
Any Program Adds or Drops from previous year? Other?				40
			answered question	**155**
			skipped question	**27**

9. INTRODUCTORY PROGRAMS - Length of Class Time (note that this applies to Introductory or Beginners Classes only)						
	30 mins	**45 mins**	**1 hour**	**1.25 hour**	**1.5 hour**	**Response Count**
Preschool Gymnastics (ages 1-2)	20.5% (25)	**63.9% (78)**	15.6% (19)	0.0% (0)	0.0% (0)	122
Preschool Gym or Cheer (ages 3-4)	4.5% (6)	**59.4% (79)**	36.1% (48)	0.0% (0)	0.0% (0)	133
Recreational Gym or Cheer (ages 5-7)	0.0% (0)	9.6% (13)	**80.1% (109)**	3.7% (5)	6.6% (9)	136
Recreational Gym or Cheer (ages 8+)	0.0% (0)	5.8% (8)	**68.3% (95)**	7.2% (10)	18.7% (26)	139
					Comments	24
					answered question	**143**
					skipped question	**39**

10. INTRODUCTORY PROGRAMS - Average Cost of each Class (Introductory or Beginners Classes only)						
	$8 - $12	**$13 - $16**	**$17 - $20**	**$21 - $25**	**$25+**	**Response Count**
Preschool Gymnastics (ages 1-2)	**49.2% (61)**	34.7% (43)	8.1% (10)	5.6% (7)	2.4% (3)	124
Preschool Gym or Cheer (ages 3-4)	**41.8% (56)**	37.3% (50)	12.7% (17)	4.5% (6)	3.7% (5)	134
Recreational Gym or Cheer (ages 5-7)	**36.0% (49)**	34.6% (47)	18.4% (25)	6.6% (9)	4.4% (6)	136
Recreational Gym or Cheer (ages 8+)	31.1% (42)	**35.6% (48)**	18.5% (25)	9.6% (13)	5.2% (7)	135
					Comments	15
					answered question	**140**
					skipped question	**42**

11. PROGRAMS - What type of EDUCATIONAL Programs do you currently offer? Please check ALL that apply.				
	Yes	**No**	**Considering**	**Response Count**
Day Camps	**64.2% (88)**	27.7% (38)	8.0% (11)	137
Afterschool	24.4% (30)	**58.5% (72)**	17.1% (21)	123
Educational Preschool	26.9% (32)	**60.5% (72)**	12.6% (15)	119
Child Care	11.8% (13)	**82.7% (91)**	5.5% (6)	110
Art	9.9% (11)	**86.5% (96)**	3.6% (4)	111
Music	9.8% (11)	**86.6% (97)**	3.6% (4)	112
Theatre	6.4% (7)	**90.0% (99)**	3.6% (4)	110
Computer Lab	4.7% (5)	**90.7% (97)**	4.7% (5)	107
Any Program Adds or Drops from previous year? Other?				8
	answered question			**141**
	skipped question			**41**

12. PROGRAMS - What type of ENTERTAINMENT Programs do you currently offer? Please check ALL that apply.				
	Yes	**No**	**Considering**	**Response Count**
Birthday Parties	**85.7% (126)**	11.6% (17)	2.7% (4)	147
Parent Night Out	**69.3% (95)**	19.7% (27)	10.9% (15)	137
Field Trips	**68.7% (92)**	25.4% (34)	6.0% (8)	134
Open Gym	**72.3% (102)**	19.9% (28)	7.8% (11)	141
Rock Climbing	9.7% (11)	**84.1% (95)**	6.2% (7)	113
Team Building	12.9% (15)	**72.4% (84)**	14.7% (17)	116
Inflatables	21.0% (25)	**67.2% (80)**	11.8% (14)	119
Indoor Softplay	14.9% (17)	**79.8% (91)**	5.3% (6)	114
Any Program Adds or Drops from previous year? Other?				18
	answered question			**149**
	skipped question			**33**

13. PARTICPANT NUMBERS TRENDS - Comparing 2009 to 2008, please estimate your Participation Numbers TRENDS in the following areas, where applicable.

	Down 16% or more	Down 6% - 15%	Down 1% - 5%	Holding steady	Up 1% - 5%	Up 6% - 15%	Up 16% or more	Response Count
Preschool Gymnastics	10.3% (13)	15.1% (19)	15.1% (19)	**27.0% (34)**	12.7% (16)	12.7% (16)	7.1% (9)	126
Recreational Gymnastics, Tumbling, Acrobatics	6.3% (8)	15.6% (20)	13.3% (17)	**31.3% (40)**	10.9% (14)	14.8% (19)	7.8% (10)	128
Competition Gymnastics	3.0% (3)	6.1% (6)	12.1% (12)	**31.3% (31)**	26.3% (26)	15.2% (15)	6.1% (6)	99
Swimming	6.7% (1)	13.3% (2)	20.0% (3)	**33.3% (5)**	6.7% (1)	13.3% (2)	6.7% (1)	15
Dance	14.0% (6)	4.7% (2)	**23.3% (10)**	**23.3% (10)**	9.3% (4)	16.3% (7)	9.3% (4)	43
Cheerleading	9.1% (7)	7.8% (6)	10.4% (8)	**32.5% (25)**	16.9% (13)	18.2% (14)	5.2% (4)	77
Martial Arts	8.0% (2)	12.0% (3)	16.0% (4)	**28.0% (7)**	24.0% (6)	8.0% (2)	4.0% (1)	25
Mobile Program	5.0% (1)	20.0% (4)	10.0% (2)	**50.0% (10)**	10.0% (2)	0.0% (0)	5.0% (1)	20
Education and Child Care	3.2% (1)	6.5% (2)	16.1% (5)	**38.7% (12)**	19.4% (6)	9.7% (3)	6.5% (2)	31
Parties and Special Events	6.3% (7)	12.6% (14)	8.1% (9)	**33.3% (37)**	17.1% (19)	15.3% (17)	7.2% (8)	111
							Comments	15
							answered question	**141**
							skipped question	**41**

14. Projected PARTICIPANT NUMBERS - For calendar 2010, please ESTIMATE your Participation Numbers TRENDS in the following areas, as compared to calendar 2009 (where applicable).

	Down 16% or more	Down 6% - 15%	Down 1% - 5%	Holding steady	Up 1% - 5%	Up 6% - 15%	Up 16% or more	Response Count
Preschool Gymnastics	5.6% (7)	5.6% (7)	8.0% (10)	25.6% (32)	**35.2% (44)**	14.4% (18)	5.6% (7)	125
Recreational Gymnastics	4.0% (5)	8.1% (10)	4.8% (6)	**29.8% (37)**	**29.8% (37)**	19.4% (24)	4.0% (5)	124
Competition Gymnastics	2.0% (2)	1.0% (1)	3.0% (3)	37.4% (37)	**40.4% (40)**	11.1% (11)	5.1% (5)	99
Swimming	5.6% (1)	5.6% (1)	11.1% (2)	**33.3% (6)**	16.7% (3)	22.2% (4)	5.6% (1)	18
Dance	6.1% (3)	4.1% (2)	8.2% (4)	24.5% (12)	**34.7% (17)**	20.4% (10)	2.0% (1)	49
Cheerleading	0.0% (0)	9.3% (7)	6.7% (5)	**28.0% (21)**	**28.0% (21)**	20.0% (15)	8.0% (6)	75
Martial Arts	3.7% (1)	7.4% (2)	11.1% (3)	**33.3% (9)**	**33.3% (9)**	7.4% (2)	3.7% (1)	27
Mobile Program	5.3% (1)	0.0% (0)	5.3% (1)	**47.4% (9)**	26.3% (5)	5.3% (1)	10.5% (2)	19
Education and Child Care	3.7% (1)	0.0% (0)	7.4% (2)	29.6% (8)	**48.1% (13)**	3.7% (1)	7.4% (2)	27
Parties and Special Events	3.2% (3)	2.2% (2)	10.8% (10)	**32.3% (30)**	29.0% (27)	15.1% (14)	7.5% (7)	93
							Comments	13
							answered question	**142**
							skipped question	**40**

15. FACILITIES - How many locations do you operate at present? (Please count Mobile Operations as 1 location)		
	Response Percent	**Response Count**
1	**73.4%**	**105**
2	15.4%	22
3	4.9%	7
4	1.4%	2
5	0.7%	1
6 or more	4.2%	6
	Comments	8
	answered question	**143**
	skipped question	**39**

16. FACILITIES - Do you Lease or Own?		
	Response Percent	**Response Count**
Lease	**60.0%**	**81**
Own	29.6%	40
Both	10.4%	14
	Comments or Other Facility arrangements	12
	answered question	**135**
	skipped question	**47**

17. FACILITIES - What is the total Square Footage under your management (include all sites)?		Response Percent	Response Count
Less than 3,000' sf		5.2%	7
3,001 - 5,000' sf		9.7%	13
5,001 - 10,000' sf		**27.6%**	**37**
10,001 - 20,000' sf		**27.6%**	**37**
20,001 - 40,000' sf		20.1%	27
40,001 - 60,000' sf		5.2%	7
60,001 - 80,000' sf		0.7%	1
Greater than 80,000' sf		3.7%	5
		Comments	5
		answered question	**134**
		skipped question	**48**

18. BUSINESS EXPANSION - Do you plan to EXPAND your operations in the next 12 months? If so, please comment and go to the next question. What new activities will you be adding?		Response Percent	Response Count
Yes		43.1%	59
No		**56.9%**	**78**
		Comments	36
		answered question	**137**
		skipped question	**45**

19. BUSINESS EXPANSION - If you are expanding operations in the next 12 months, what form will this take? Please check all that apply.

	Response Percent	Response Count
Expand current location space	**32.8%**	**19**
Expand satellite location space	5.2%	3
New satellite locations	27.6%	16
Mobile Programs	22.4%	13
City Recreation or other Partnerships	**32.8%**	**19**
Building new location	24.1%	14
Other/Comments		14
	answered question	**58**
	skipped question	**124**

20. MANAGEMENT - Which area(s) represent your most persistent challenge in running the business? Please check all that apply and use the Comments box if you like.

	Response Percent	Response Count
Long Term Strategies	31.3%	42
Marketing and Client Education	41.8%	56
Managing and Developing People	**53.7%**	**72**
Information Technology	13.4%	18
Financial - Revenue and Tracking	33.6%	45
Facility Maintenance	21.6%	29
Risk Management	5.2%	7
Inspiration!	17.9%	24
Other/Comments		17
answered question		**134**
skipped question		**48**

21. MANAGEMENT - What is your main Business Goal or Goals for the next 12 months?

	Response Count
	120
answered question	**120**
skipped question	**62**

22. FINANCIAL - How would you describe your Billing Type?		
	Response Percent	Response Count
Session Basis	29.7%	38
Perpetual Basis (monthly, ongoing)	**47.7%**	**61**
Both	21.9%	28
Other (describe below)	0.8%	1
	Comments/Other	7
	answered question	**128**
	skipped question	**54**

23. FINANCIAL - What Financial Software do you use?		
	Response Percent	Response Count
Quickbooks	**64.1%**	**82**
Other software package	11.7%	15
Excel spreadsheets	10.9%	14
Accountant does our internal books	12.5%	16
Not sure	0.8%	1
	Other	14
	answered question	**128**
	skipped question	**54**

24. FINANCIAL - How do you determine the Financial Health of your Company? Please check ALL that apply.

	Response Percent	Response Count
Overall MONTHLY Company Profit & Loss Statements	55.6%	69
Individual MONTHLY Program Profit & Loss Statements	32.3%	40
Overall YEARLY Company Profit & Loss Statements	**59.7%**	**74**
Individual YEARLY Program Profit & Loss Statements	30.6%	38
Ongoing Balance Sheet analysis	37.1%	46
Ongoing Cash Flow Statement analysis	45.2%	56
Other		9
answered question		**124**
skipped question		**58**

25. FINANCIAL - What were/are your Gross Revenues (GR) for the following periods for ALL of your operations combined?

	under $250K	$250K - $499K	$500K - $999K	$1.0 Mill - $1.49 Mill	$1.5 Mill - $1.99 Mill	$2.0 Mill - $2.99 Mill	$3.0 Mill + up	Rating Average	Response Count
Fiscal 2009 (actual GR)	**34.5% (41)**	23.5% (28)	21.0% (25)	10.9% (13)	4.2% (5)	2.5% (3)	3.4% (4)	2.48	119
Fiscal 2010 (projected GR)	**31.0% (36)**	23.3% (27)	22.4% (26)	12.1% (14)	5.2% (6)	2.6% (3)	3.4% (4)	2.59	116
Comments									9
answered question									**120**
skipped question									**62**

26. FINANCIAL - What were/are your Gross Revenues (GR) TRENDS for the following periods for ALL of your operations combined?

	Down 16% or more	Down 6% - 15%	Down 1% - 5%	Holding steady	Up 1% - 5%	Up 6% - 15%	Up 16% or more	Response Count
Fiscal 2009 (actual GR)	6.8% (8)	16.2% (19)	14.5% (17)	**29.9% (35)**	15.4% (18)	14.5% (17)	2.6% (3)	117
Fiscal 2010 (projected GR)	3.7% (4)	3.7% (4)	12.8% (14)	26.6% (29)	**27.5% (30)**	15.6% (17)	10.1% (11)	109
							Comments	9
							answered question	**119**
							skipped question	**63**

27. FINANCIAL - What were/are your Net Profit (NP) TRENDS for the following periods for ALL of your operations combined? What we are after here is the TREND in the TOTAL NET PROFITS or DISCRETIONARY EARNINGS of your company. You determine this by taking your Company Profits (or losses) from your Tax Return, then ADD BACK your base salary, your personal payroll taxes, any dividends, health insurances, excess rent payments (if applicable), cell phones, personal auto expenses, retirement fund payments and any other extraordinary expenses paid BY THE BUSINESS on your behalf. This is actually FUN to do, and the figure usually amounts to a lot more than you'd think on a day-to-day basis!

	Down 16% or more	Down 6% - 15%	Down 1% - 5%	Holding steady	Up 1% - 5%	Up 6% - 15%	Up 16% or more	Response Count
Fiscal 2009 (actual NP)	8.9% (10)	9.8% (11)	9.8% (11)	**34.8% (39)**	18.8% (21)	8.9% (10)	8.9% (10)	112
Fiscal 2010 (projected NP)	2.9% (3)	2.9% (3)	6.9% (7)	**37.3% (38)**	25.5% (26)	14.7% (15)	9.8% (10)	102
							Comments	8
							answered question	**113**
							skipped question	**69**

28. FINANCIAL - What are your Annual Gross Revenues per Square Foot? To calculate this, simply divide your company-wide Annual Gross Revenues by the total Square Footage under your management.

	Response Percent	Response Count
Less than $30	**32.4%**	**33**
$31 - $40	24.5%	25
$41 - $50	16.7%	17
$51 - $60	8.8%	9
$61 - $70	7.8%	8
$71 - $80	2.0%	2
More than $80	7.8%	8
	Comments	8
	answered question	**102**
	skipped question	**80**

29. FINANCIAL - What is your PAYROLL Cost as a percentage of Gross Revenues? To calculate this, simply divide your Payroll Cost (All Staff Payroll, Payroll Taxes, all Staff Benefits including Health and Bonuses, and REASONABLE Owner Compensation) by your Annual Gross Revenues. "Reasonable Owner Compensation" would be defined as the amount you would pay SOMEONE ELSE to perform your actual job functions, not including your strategic planning time.

	Response Percent	Response Count
Under 20%	14.7%	16
21% - 30%	14.7%	16
31% - 40%	**26.6%**	**29**
41% - 50%	25.7%	28
51% - 60%	16.5%	18
Over 60%	1.8%	2
	Comments	9
	answered question	**109**
	skipped question	**73**

30. FINANCIAL - What is your RENT Cost as a percentage of Gross Revenues? To calculate this, simply divide your Annual Rent Cost (If you RENT - use base rent figure, plus CAM's or Property Taxes, Property Insurance. If you OWN - use your BASE mortgage figure, plus Property Taxes, Property Insurance) by your Annual Gross Revenues.

	Response Percent	Response Count
Under 10%	10.9%	11
11% - 20%	**44.6%**	**45**
21% - 30%	26.7%	27
31% - 40%	9.9%	10
Over 40%	7.9%	8
	Comments	9
	answered question	**101**
	skipped question	**81**

31. FINANCIAL - What is your MARKETING Expenses as a percentage of Gross Revenues? To calculate this, simply divide your Annual Marketing Cost (Advertising - Phone book ads, web sites, direct mail, coupons, print ads, radio, TV, Promotions, etc.) by your Annual Gross Revenues.

	Response Percent	Response Count
Under 1%	19.8%	22
1% - 2%	**31.5%**	**35**
3% - 4%	24.3%	27
5% - 7%	18.0%	20
8% - 10%	5.4%	6
Over 10%	0.9%	1
	Comments	8
	answered question	**111**
	skipped question	**71**

32. FINANCIAL - Which COST-CUTTING moves were MOST EFFECTIVE in 2009? Please check ALL that apply.			
		Response Percent	Response Count
Cutting number of Full Time Staff		23.2%	22
Cutting number of Part Time Staff		34.7%	33
Converting to Variable Income Compensation Plan		4.2%	4
Renegotiating Lease terms		25.3%	24
Renegotiating Mortgage terms		7.4%	7
Renegotiating or re-bidding with all Suppliers		12.6%	12
Becoming a more energy-efficient facility		30.5%	29
Aggressively consolidating classes		**52.6%**	**50**
Increasing ratios in classes		32.6%	31
		Other/Comments	23
		answered question	**95**
		skipped question	**87**

33. FINANCIAL - Which REVENUE-INCREASING moves are you employing in 2010? Please check ALL that apply.			
		Response Percent	Response Count
Asking Full Time Staff to do more, or be more productive		40.4%	44
Asking Part Time Staff to do more, or be more productive		41.3%	45
Adding Programs for additional revenue streams		**78.0%**	**85**
Raising Prices		44.0%	48
Sub-Leasing to other entities in down times		20.2%	22
		Other/Comments	11
		answered question	**109**
		skipped question	**73**

34. FINANCIAL - Where do you currently get financial advice? Please check all that apply.			
		Response Percent	Response Count
Accountant		**64.3%**	**72**
Financial Planner		16.1%	18
Industry Consultant		33.0%	37
Financial Publications or Online Service		26.8%	30
None		24.1%	27
		Other /Comments	11
		answered question	**112**
		skipped question	**70**

35. MARKETING - What is your spending plan for Marketing in calendar 2010?			
		Response Percent	**Response Count**
Spend ABOUT THE SAME as previous year		**54.9%**	**62**
Spend 5-10% LESS than previous year		14.2%	16
Spend 11-20% LESS than previous year		2.7%	3
Spend 5-10% MORE than previous year		20.4%	23
Spend 11-20% MORE than previous year		8.0%	9
		Why? What is your rationale?	37
		answered question	**113**
		skipped question	**69**

36. MARKETING - Please rate the following in terms of RETURN ON INVESTMENT of your marketing dollars for your company.

	Outstanding Return	Above Average Return	Average Return	Below Average Return	Poor to No Return	Rating Average	Response Count
Web Site	**40.7% (44)**	25.9% (28)	25.9% (28)	4.6% (5)	2.8% (3)	3.97	108
Social Networking	20.0% (18)	25.6% (23)	**36.7% (33)**	8.9% (8)	8.9% (8)	3.39	90
Yellow Pages	2.2% (2)	4.3% (4)	**33.7% (31)**	31.5% (29)	28.3% (26)	2.21	92
Family Magazines	2.7% (2)	11.0% (8)	26.0% (19)	**30.1% (22)**	**30.1% (22)**	2.26	73
Newspaper Ads	1.2% (1)	6.0% (5)	**31.0% (26)**	**31.0% (26)**	**31.0% (26)**	2.15	84
Radio Ads	0.0% (0)	6.0% (3)	16.0% (8)	30.0% (15)	**48.0% (24)**	1.80	50
Television Ads	6.5% (3)	4.3% (2)	21.7% (10)	15.2% (7)	**52.2% (24)**	1.98	46
Direct Mail	10.1% (7)	24.6% (17)	**36.2% (25)**	18.8% (13)	10.1% (7)	3.06	69
Word of Mouth	**62.8% (71)**	30.1% (34)	7.1% (8)	0.0% (0)	0.0% (0)	4.56	113
Public Relations	23.5% (19)	**37.0% (30)**	30.9% (25)	4.9% (4)	3.7% (3)	3.72	81
Community Involvement	24.7% (24)	**41.2% (40)**	25.8% (25)	5.2% (5)	3.1% (3)	3.79	97
						Other/Comments	14
						answered question	**114**
						skipped question	**68**

37. MARKETING - What are your preferred SOCIAL NETWORKING mediums? Please check ALL that apply.		Response Percent	Response Count
Email - it still works as a business tool!		85.5%	94
Web Site		**96.4%**	**106**
Multiple Web Sites		6.4%	7
Facebook		48.2%	53
My Space		5.5%	6
Linked In		1.8%	2
Text Messages		10.0%	11
Twitter		10.9%	12
Blogs		10.9%	12
		Other/Comments	19
		answered question	**110**
		skipped question	**72**

38. MARKETING - Do you have a FORMAL Marketing Plan for calendar 2010? Please check the best answer.		Response Percent	Response Count
Yes, we have a detailed Marketing Plan		11.1%	13
Yes, we have a general Marketing Plan		**31.6%**	**37**
Sort of, it is roughly sketched out		16.2%	19
Sort of, it is all in my head!		20.5%	24
No		20.5%	24
		Comments	10
		answered question	**117**
		skipped question	**65**

39. DATA - What kind of Database Software does your Company use to handle Customer Information? Please check ALL that apply.		Response Percent	Response Count
Web-based		**37.6%**	**44**
Server-based with VPN capability		3.4%	4
Server-based, no VPN capability		5.1%	6
Packaged software		35.0%	41
Custom-build software		13.7%	16
Manual (paper) system		17.9%	21
None		3.4%	4
		Other method	11
		answered question	**117**
		skipped question	**65**

40. DATA - What Database Software company do you currently use? Please put NONE if not applicable.	
	Response Count
	102
answered question	**102**
skipped question	**80**

41. DATA - What Database Software features do you use consistently? Please check ALL that apply.		
	Response Percent	**Response Count**
Client Registration & Scheduling	85.7%	84
Client Accounting	82.7%	81
Class Roll Sheets	**86.7%**	**85**
Monitoring Student Progress	23.5%	23
Instructor Scheduling	31.6%	31
Other (please specify)		9
answered question		**98**
skipped question		**84**

42. DATA - What Database Software features would you most like to see in the future? Please check ALL that apply.		Response Percent	Response Count
More powerful Client Registration capabilities		**61.8%**	**47**
More powerful Client Accounting features		51.3%	39
More comprehensive Financial Reporting options		59.2%	45
Increased Roll Sheet Layout features		42.1%	32
Increased Instructor Scheduling options		36.8%	28
More options for HTML email and attachments		55.3%	42
		Other (please specify)	17
		answered question	**76**
		skipped question	**106**

43. DATA - Overall, does your Database Software represent a reasonable Cost:Benefit?		Response Percent	Response Count
Yes, completely satisfied		23.0%	23
Yes, mostly satified		**45.0%**	**45**
Neutral		27.0%	27
No, somewhat unsatisfied		3.0%	3
No, completely unsatified		2.0%	2
		Comments	13
		answered question	**100**
		skipped question	**82**

44. RISK MANAGEMENT - What Insurance Provider do you currently use for Liability and Accident/Medical coverage?	
	Response Count
	96
answered question	**96**
skipped question	**86**

45. RISK MANAGEMENT - Overall, does your Liability and Accident/Medical Insurance represent a reasonable Cost:Benefit?		
	Response Percent	**Response Count**
Yes, completely satisfied	33.0%	38
Yes, mostly satified	**40.9%**	**47**
Neutral	21.7%	25
No, somewhat unsatisfied	2.6%	3
No, completely unsatified	1.7%	2
	Comments	13
	answered question	**115**
	skipped question	**67**

46. RISK MANAGEMENT - Please rate EACH of the following types of Insurance, in terms of importance for your compa

	Absolutely Critical	Very Important	Important	Important if affordable	Not at all Necessary	Rating Average	Respo Cou
Liability	**87.8% (101)**	8.7% (10)	3.5% (4)	0.0% (0)	0.0% (0)	4.84	
Accident/Medical	**65.8% (75)**	23.7% (27)	7.0% (8)	2.6% (3)	0.9% (1)	4.51	
Catastrophic Cash	**33.7% (35)**	19.2% (20)	22.1% (23)	12.5% (13)	12.5% (13)	3.49	
Building and Contents	**41.7% (48)**	29.6% (34)	19.1% (22)	7.0% (8)	2.6% (3)	4.01	
Business Interruption	20.4% (22)	**28.7% (31)**	20.4% (22)	20.4% (22)	10.2% (11)	3.29	
Health Insurance (your Family)	**36.8% (39)**	17.0% (18)	15.1% (16)	13.2% (14)	17.9% (19)	3.42	
Health Insurance (Key Staff)	20.8% (22)	**23.6% (25)**	18.9% (20)	21.7% (23)	15.1% (16)	3.13	
Disability (your Family)	11.8% (12)	12.7% (13)	21.6% (22)	**29.4% (30)**	24.5% (25)	2.58	
Disability (Key Staff)	8.7% (9)	13.6% (14)	17.5% (18)	**35.0% (36)**	25.2% (26)	2.46	
Worker's Compensation	**40.4% (44)**	19.3% (21)	16.5% (18)	11.9% (13)	11.9% (13)	3.64	
Life Insurance	11.2% (12)	15.9% (17)	22.4% (24)	19.6% (21)	**30.8% (33)**	2.57	
Key Man Insurance (Partner Death Protection)	12.6% (12)	7.4% (7)	11.6% (11)	15.8% (15)	**52.6% (50)**	2.12	
						Comments	
						answered question	
						skipped question	

47. PEOPLE - How many Full Time (30+ hours per week) Staff do you employ throughout your operations, including yourself and your spouse or business partners, if applicable?

	Response Percent	Response Count
None	10.9%	13
1	12.6%	15
2-4	**32.8%**	**39**
5-10	29.4%	35
11-15	7.6%	9
16-20	4.2%	5
21+	2.5%	3
	Comments	6
	answered question	**119**
	skipped question	**63**

48. PEOPLE - What is the Annual Base Salary or Annual Hourly Total AVERAGE range for your Full Time staff? (Do not include yourself, and do not include Incentives, Bonuses, Profit-Sharing and other Benefits).

	Response Percent	Response Count
$18,000 - $23,999	22.6%	21
$24,000 - $35,999	**49.5%**	**46**
$36,000 - $47,999	23.7%	22
$48,000 - $59,999	4.3%	4
$60,000 - $69,999	0.0%	0
$70,000 and up	0.0%	0
	Comments	13
	answered question	**93**
	skipped question	**89**

49. PEOPLE - What is the Annual AVERAGE Total Incentives, Bonuses, Profit-Sharing and other Benefits range for your Full Time staff? (Do not include yourself).

	Response Percent	Response Count
$000 - $999	**60.2%**	**59**
$1,000 - $2,999	17.3%	17
$3,000 - $5,999	16.3%	16
$6,000 - $9,999	3.1%	3
$10,000 - $14,999	2.0%	2
$15,000 and up	1.0%	1
	Comments	7
	answered question	**98**
	skipped question	**84**

50. PEOPLE - How many Part Time (1-29 hours per week) Staff do you employ throughout your operations, including yourself and your spouse, if applicable? You might choose an AVERAGE here, allowing for seasonal variations.

	Response Percent	Response Count
None	5.1%	6
1-5	13.7%	16
6-10	24.8%	29
11-20	**25.6%**	**30**
21-40	19.7%	23
41-60	6.8%	8
61-99	1.7%	2
100+	2.6%	3
	Comment	4
	answered question	**117**
	skipped question	**65**

51. PEOPLE - What is the Range of Hourly Compensation for your Part Time staff?

	$7-$9	$10-$12	$13-$17	$18-$20	$21-$25	$26-$30	$31+	Response Count
Lowest Hourly	**72.8% (83)**	18.4% (21)	5.3% (6)	0.9% (1)	1.8% (2)	0.0% (0)	0.9% (1)	114
Highest Hourly	2.9% (3)	18.1% (19)	**35.2% (37)**	26.7% (28)	10.5% (11)	1.9% (2)	4.8% (5)	105
Median Hourly	10.8% (11)	**54.9% (56)**	28.4% (29)	1.0% (1)	2.0% (2)	2.0% (2)	1.0% (1)	102
							Comments	4
							answered question	**115**
							skipped question	**67**

52. PEOPLE - How do you see the employment picture shaping up for your company in the next 1-3 years? Please check all that apply.

	Response Percent	Response Count
More Full Time People	22.6%	26
More Part Time People	**51.3%**	**59**
Greater Percentage of Full Time People	10.4%	12
Greater Percentage of Part Time People	14.8%	17
Not sure	27.8%	32
	Comments	9
	answered question	**115**
	skipped question	**67**

53. PEOPLE - TECHNICAL DEVELOPMENT Please rank the following Professional Development tools.							
	Very Effective	**Somewhat Effective**	**Neutral**	**Not Effective**	**Not Used**	**Rating Average**	**Response Count**
Books	17.9% (20)	**43.8% (49)**	28.6% (32)	1.8% (2)	8.0% (9)	3.62	112
DVD's	28.9% (33)	**43.0% (49)**	18.4% (21)	1.8% (2)	7.9% (9)	3.83	114
Online Courses	23.9% (27)	**37.2% (42)**	25.7% (29)	4.4% (5)	8.8% (10)	3.63	113
In-House Training Workshops	**60.5% (69)**	28.9% (33)	4.4% (5)	0.9% (1)	5.3% (6)	4.39	114
Shadow Coaching	**62.8% (71)**	27.4% (31)	5.3% (6)	0.9% (1)	3.5% (4)	4.45	113
Guest Clinicians	**36.6% (41)**	30.4% (34)	13.4% (15)	1.8% (2)	17.9% (20)	3.66	112
						Other Effective Tools	10
						answered question	**117**
						skipped question	**65**

54. PEOPLE - BUSINESS MANAGEMENT ANDLEADERSHIP SKILLS DEVELOPMENT Please rank the following Professional Development tools.

	Very Effective	Somewhat Effective	Neutral	Not Effective	Not Used	Rating Average	Response Count
Books	25.9% (29)	**39.3% (44)**	21.4% (24)	3.6% (4)	9.8% (11)	3.68	112
DVD's	23.5% (27)	**34.8% (40)**	24.3% (28)	1.7% (2)	15.7% (18)	3.49	115
Online Courses	25.7% (29)	**29.2% (33)**	26.5% (30)	2.7% (3)	15.9% (18)	3.46	113
In-House Training Workshops	**41.4% (46)**	31.5% (35)	9.9% (11)	1.8% (2)	15.3% (17)	3.82	111
Seminars	**46.0% (52)**	41.6% (47)	7.1% (8)	0.9% (1)	4.4% (5)	4.24	113
Guest Speakers	25.5% (28)	**36.4% (40)**	13.6% (15)	0.9% (1)	23.6% (26)	3.39	110
Other Effective Tools							0
	answered question						**117**
	skipped question						**65**

55. LEARNING OPPORTUNITIES - Which events will you or your Key Staff consider attending during this calendar year? Please check ALL that apply.

	Definitely	Seriously considering	Possibly	Not attending	N/A	Rating Average	Response Count
USA Gymnastics National Congress	23.0% (26)	13.3% (15)	22.1% (25)	**30.1% (34)**	11.5% (13)	2.33	113
USA Gymnastics Regional Congress	**30.2% (35)**	17.2% (20)	17.2% (20)	20.7% (24)	14.7% (17)	2.67	116
Cheerleading Regional or National Education Event	13.3% (14)	8.6% (9)	18.1% (19)	26.7% (28)	**33.3% (35)**	2.13	105
US Swim School Assn National Conference	2.0% (2)	0.0% (0)	4.0% (4)	28.3% (28)	**65.7% (65)**	1.29	99
US Swim School Assn Regional Events	1.0% (1)	1.0% (1)	6.2% (6)	26.8% (26)	**64.9% (63)**	1.32	97
3rd Level's Business Brain Trust Conference	15.0% (16)	4.7% (5)	26.2% (28)	**39.3% (42)**	15.0% (16)	1.95	107
Dance Trade Show	4.1% (4)	3.1% (3)	10.2% (10)	28.6% (28)	**54.1% (53)**	1.62	98
Martial Arts Trade Show	0.0% (0)	0.0% (0)	5.0% (5)	32.0% (32)	**63.0% (63)**	1.14	100
Entertainment Industry Conferences	1.0% (1)	3.0% (3)	9.9% (10)	27.7% (28)	**58.4% (59)**	1.45	101
Educational Industry Conferences	5.0% (5)	4.0% (4)	27.7% (28)	25.7% (26)	**37.6% (38)**	1.81	101
						Other Events/Comments	10
						answered question	**119**
						skipped question	**63**