



# INDOOR CLIMBING INDUSTRY REPORT

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# 2022



**Climbing Wall Association, Inc.  
88200 South Quebec Street, Box 413  
Centennial, Colorado 80112**

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# ABOUT THE CLIMBING WALL ASSOCIATION

The Climbing Wall Association is a trade association dedicated to protecting, connecting, and educating the indoor climbing industry. We provide relevant and actionable climbing business resources that keep the industry healthy and thriving. We do this through advocacy; developing industry standards; publishing industry news, data and analysis; sponsoring certification and professional development programs; and producing community-building and educational events.

Learn more and become a member at [www.cwapro.org](http://www.cwapro.org).



# REPORT CONTENTS

<b>INTRODUCTION</b>	<b>5</b>
Methodology .....	7
<b>OVERVIEW</b>	<b>8</b>
Company Operator Overview .....	9
Business Years Open + Ownership.....	10
Business Location .....	11
Local Competition.....	12
Policy Work At Height.....	12
Curricula Work At Height .....	14
Challenges .....	15
Areas of Growth .....	16
<b>FINANCIALS</b>	<b>17</b>
Gross Revenue .....	18
Revenue by Category.....	20
Product Prices .....	26
Expenses by Categories .....	27
Payroll Expenses .....	35
<b>MEMBERSHIP</b>	<b>36</b>
Membership Numbers.....	37
Check-Ins & First time visitors.....	38
Member Retention .....	39
<b>FACILITY</b>	<b>40</b>
Facility Size Surface Areas.....	41
Bouldering / Rope Climbing Walls .....	42
Climbing Equipment.....	43
Facility Offerings .....	44
Auxiliary Services Provided.....	45
<b>APPENDICES</b>	<b>46</b>
Additional Resources.....	47
Acknowledgements .....	48
Industry Survey Questions .....	49

# REPORT INTRODUCTION

The purpose of the CWA's annual Indoor Climbing Industry Survey is to provide reliable data and business metrics for indoor climbing industry stakeholders. We are also building an ongoing view of indoor climbing businesses in the US and Canada to develop long-term analysis, trends, and insights for our young industry.

Starting in 2017, the CWA began establishing an industry research program to develop information that aides climbing gym owners, industry vendors, and prospective gym owners in their decision-making processes. That initiative resulted in the 2018 Indoor Climbing Industry Report, the first of what has become an annual industry benchmarking project.

In 2019, the Indoor Climbing Industry Survey saw an increase in participation, but due to the COVID-19 pandemic and related shutdowns, the CWA did not gather data during this time, focusing efforts on supporting gyms during this time and due to the likelihood of the data being incomplete. The 2022 survey saw 181 unique responses from 43 unique gyms, providing feedback from a wide range of gym across the US and Canada. We are grateful to all those who participated and helped further industry cooperation.

The data and analysis here are representative of the respondents and do not necessarily represent other operations. The survey was conducted in partnership via a collaboration between the CWA and RRC Associates of Boulder, Colo. Data were collected via an online survey platform during September and October of 2022. A comprehensive list of commercial climbing gyms in the US and Canada was developed, contact information was identified for as many operations as possible, and gym operators were contacted via email and social media. In working toward our goal of providing actionable data for the industry, the 2022 Indoor Climbing Industry Report has been improved in a couple key areas.



# REPORT INTRODUCTIONS

First, we created a Research Advisory Committee to act as an advisory body for the CWA's industry research projects, aligning those projects with the needs of the industry. The committee has provided advice and input on key project milestones, especially the development of survey questions and improvement of reporting.

The group was selected based on their deep working knowledge of our industry's research and data needs, their backgrounds in research, and their extensive experience working in the industry. The members of the committee provide a fair and balanced representation of CWA members and industry sectors. The committee includes climbing gym owners, gym managers, senior staff, academic researchers, wall builders, gear manufacturers, and industry experts. A list of committee members who contributed to this project can be found in the Acknowledgements section on page 48 of this report.

Second, we refined our approach to reporting by dividing the results into more useful categories so that business owners can see their businesses more accurately reflected in the results. The categories are based on number of locations and facility type. The category of full-service locations is defined as facilities that offer both bouldering and some form of roped climbing, including top rope, lead climbing, and auto-belays. Bouldering-only locations do not offer any type of roped climbing. Within these two main categories, we have further categorized the results by number of locations in order to reveal differences between smaller and larger operations.

This study focuses on commercial climbing gyms, which are defined as facilities where the primary offering is indoor climbing. Some health clubs, recreation centers, and other facility types offer indoor climbing along with many other offerings; these were not included in this study.

# RESEARCH METHODOLOGY

Surveys were administered via online link through internal CWA email list to indoor gym operators. Of those contacted, a total of 181 surveys were responded to over the period of data collection. Surveys were collected from May 5, 2022 – September 9, 2022.

This study focuses on commercial climbing gyms, which are defined as facilities where the primary offering is indoor climbing. Some health clubs, recreation centers, and other facility types offer indoor climbing along with many other offerings; these were not included in this study.



**181**  
TOTAL RESPONSES



**43**  
IDENTIFIED GYMS

## HELP US GROW INDUSTRY DATA

While we've made many improvements to this year's industry report, there is still room to grow! As we continue to refine this survey and the CWA's Industry Research Program overall, we invite you to get involved. The best way to make our industry reports more useful is by increasing participation. By adding your information to our annual surveys, you help yourself and the industry as a whole. Participants receive free access to a copy of the report and bolster the overall accuracy of the information contained within the report.

**Be sure to receive a notification when future surveys are available by signing up for Lines, the CWA's industry newsletter, at <https://mc.cwapro.org/newsletter>.**

*Source: CWA 2022 Indoor Climbing Industry Report*



# OVERVIEW

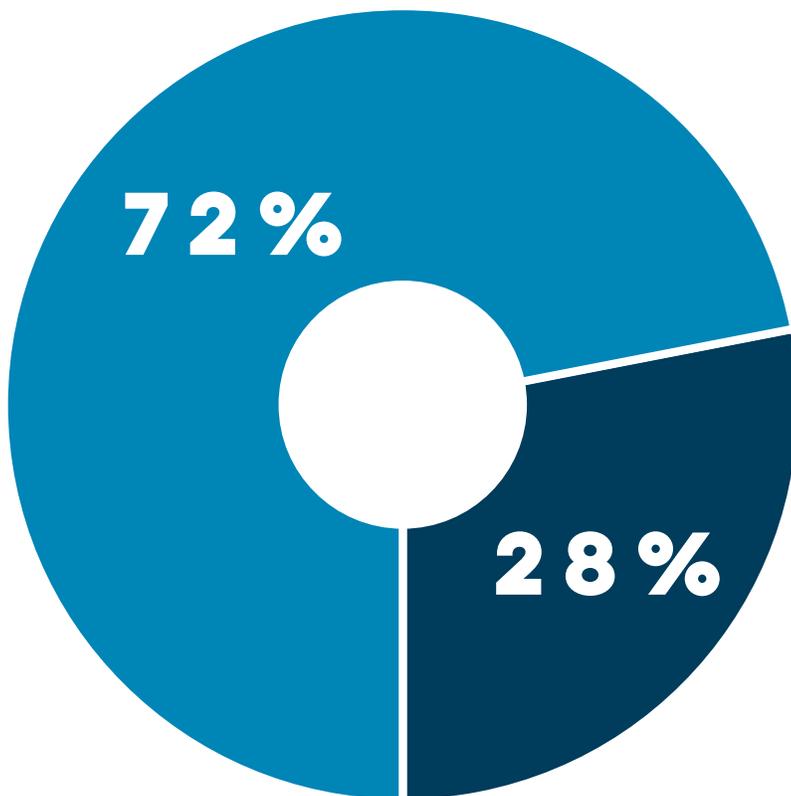
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Company Operator Overview.....	9
Business Years Open + Ownership.....	10
Business Location .....	11
Local Competition .....	12
Policy Work At Height .....	13
Curricula Work At Height .....	14
Challenges .....	15
Areas of Growth .....	16

# COMPANY OPERATOR OVERVIEW

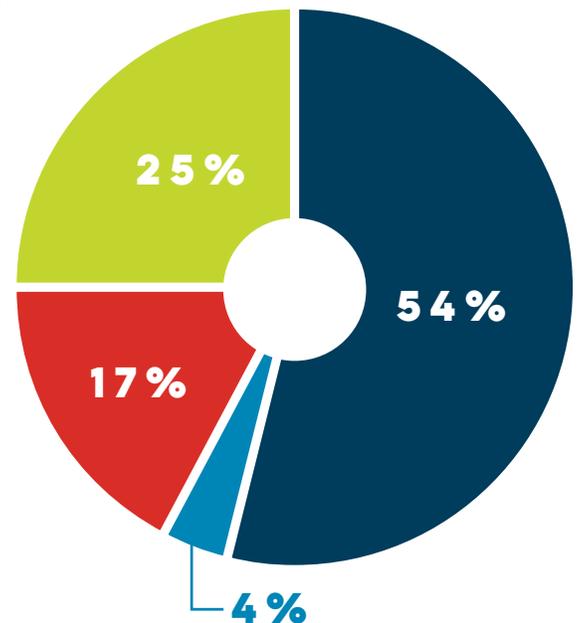
## Commercial Climbing Companies

On average, multi-gym operators operated 3.5 gyms.



Question 2: Which of the following best describes your company? n=63

- Single Gym Location Operator
- Multi Gym Location Operator



Question 10: Please enter the number of separate gym locations your company operates. n=63

- Operates 2 Gyms
- Operates 3 Gyms
- Operates 4 Gyms
- Operates 5+ Gyms

### SINGLE GYM OPERATORS

- 29** Full Service
- 9** Bouldering Only

### MULTI GYM OPERATORS

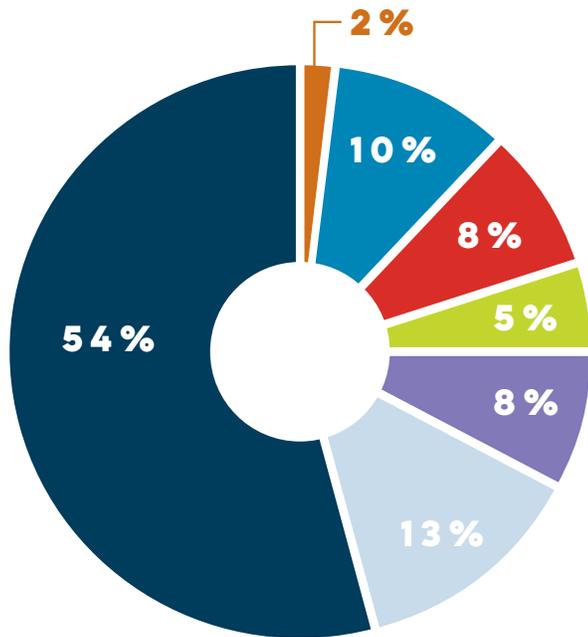
- 17** Full Service
- 6** Bouldering Only

*Full service facilities offer rope climbing, bouldering facilities do not offering rope climbing*

# BUSINESS YEARS OPEN + OWNERSHIP

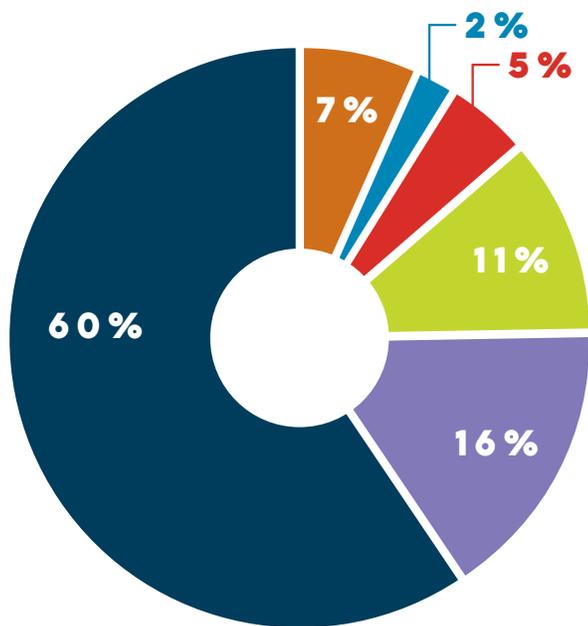
## Commercial Climbing Years in Business and Years Under Current Ownership

75% of climbing gyms have opened in the last 20 years, with more than half opening since 2015. 76% of gyms have come under new ownership in the last 12 years.



Question 13: What year did this location open? (Please enter a 4-digit year) n=61

- 1990 or older
- 1990-1994
- 1995-1999
- 2000-2004
- 2005-2009
- 2010-2014
- 2015-2019



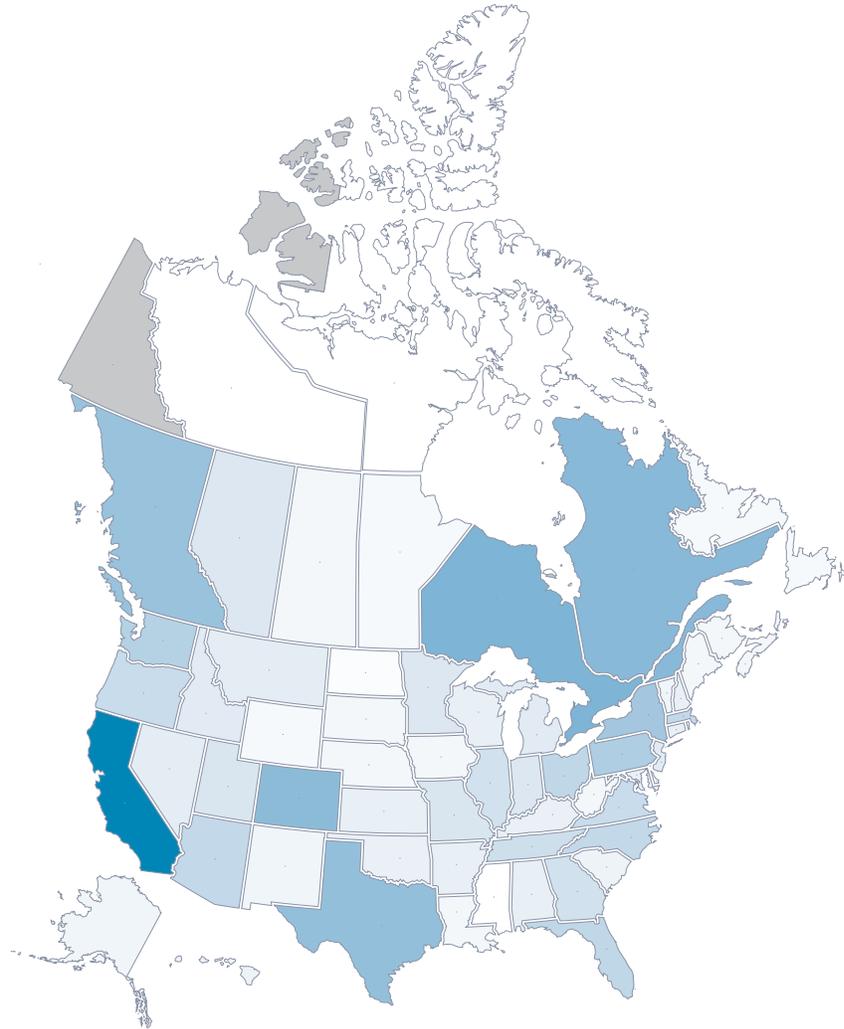
Question 15: What year did this location come under current ownership? (Please enter a 4-digit year) n=57

- 1990-1994
- 1995-1999
- 2000-2004
- 2005-2009
- 2010-2014
- 2015-2019

# BUSINESS LOCATION

## Commercial Climbing Facilities in North America

The CWA identified 777 distinct commercial climbing facilities in the US and Canada as of January 2024, an increase of 34.6% from 2019. California has the most operations (90), and Mississippi is the only state without an operating commercial climbing gym.



### NUMBER OF GYMS BY STATE/PROVIDENCE



#### UNITED STATES GYMS

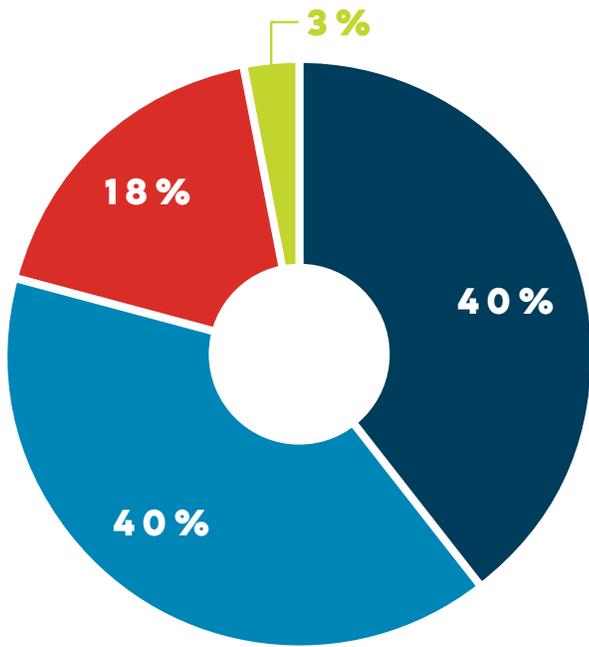
**631** Total  
**402** Full Service Gyms  
**229** Bouldering/Other

#### CANADIAN GYMS

**146** Total  
**81** Full Service Gyms  
**65** Bouldering/Other

# LOCAL COMPETITION

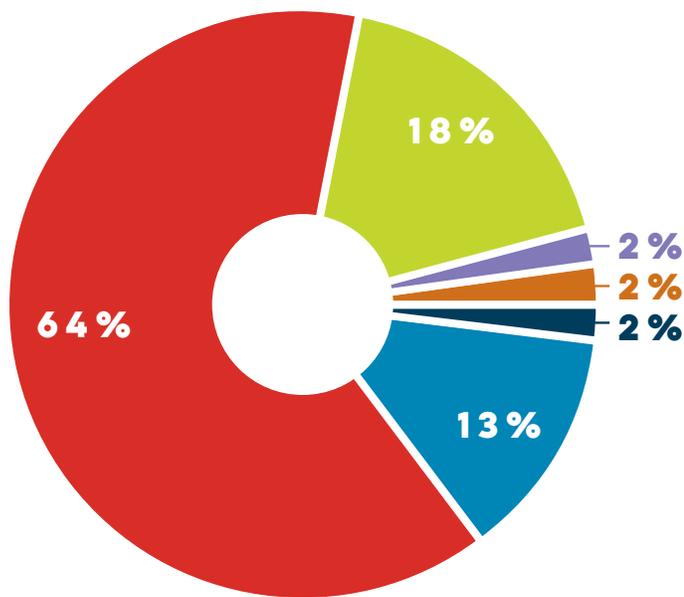
## Commercial Climbing Competition



Question 23: How many direct competitors do you have within your market area?

- 1 Competitor
- 2-4 Competitors
- 5-9 Competitors
- 10 or More Competitors

n=40



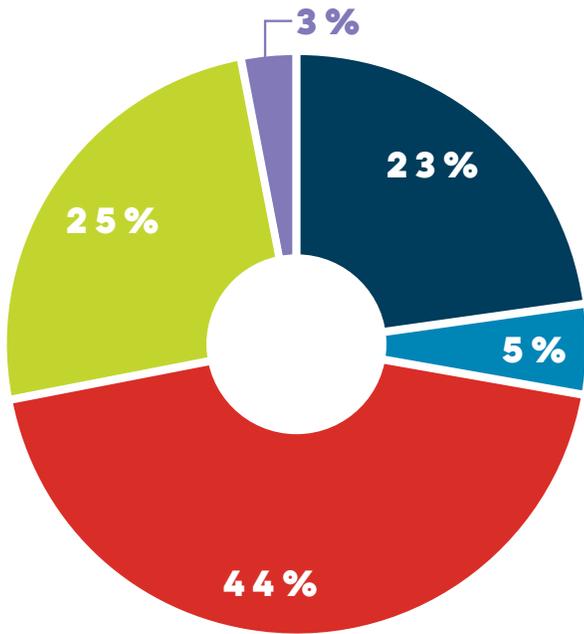
Question 24: Which of the following best describes the market saturation for what you define as this gym's market area?

- Extremely Oversaturated
- Oversaturated
- About Right
- Undersaturated
- Don't Know
- Prefer Not to Answer

n=61

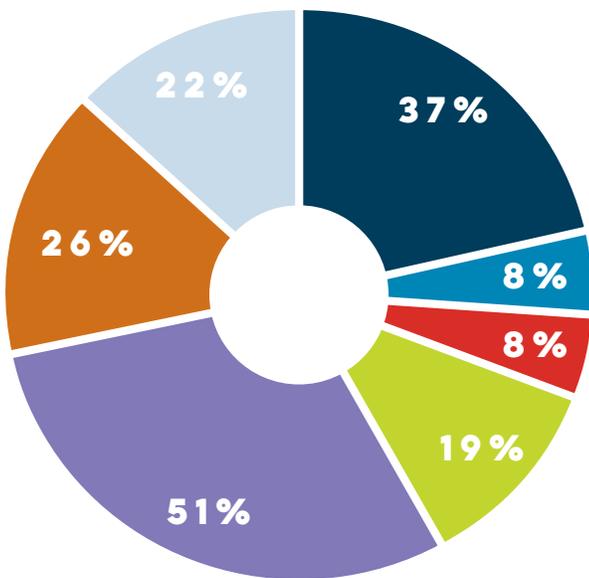
# POLICY WORK AT HEIGHT

## Commercial Work at Height Policies and Procedures



**Question 3: Which of the following best describes your company in regards to Work at Height policies/plans?** n=118

- Multi-location owner with a company-wide Work at Height policy/plan that applies to all locations
- Multi-location owner that has Work at Height policy/plan at some, but not all locations
- Single location owner with a work a Work at Height policy/plan
- My company does not have a Work at Height policy/plan
- Don't know



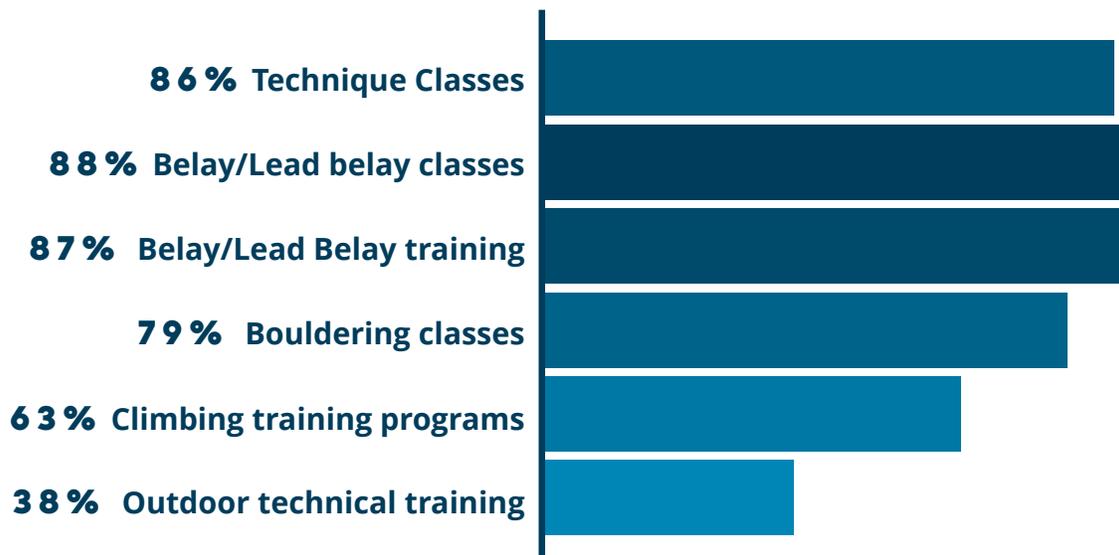
**Question 4: Which of the following did you consult in creating your Work at Height policy/plan? (check all that apply)** n=112

- Other Climbing Company Owners
- Attorney
- Textbooks
- Conference Presentations
- CWA Work at Height Program
- Other Work at Height Program
- None/NA

# CURRICULA WORK AT HEIGHT

## Work at Height Curricula & Criteria

Question 5: Does your company use written curricula/criteria for the following? n=112



# INDUSTRY & BUSINESS CHALLENGES

## Industry Challenges

Inflation, insurance, and staffing represent clear challenges facing the industry. “Gym” was often used in comparison to competitors for a variety of factors, while “climbing” related to behaviors around the sport. Numbers in the circle represent the number of times the topic was mentioned.

*Question 8: In a few words, please describe what you see as the (up to) top-3 challenges facing the industry in general.*



## Business Challenges

Staffing-related concerns were the most referenced challenges facing survey respondents (staffing, retention, employee, and wage all appearing in the top eight most commonly listed responses). Numbers in the circle represent the number of times the topic was mentioned.

*Question 6: In a few words, please describe what you see as the (up to) top-3 challenges for your specific business?*



# INDUSTRY & BUSINESS AREAS OF GROWTH

## Industry Areas of Growth

The industry areas of growth greatly skewed to youth climbers, through increased programs, teams, competitions, and services. Climbing also was related to increases programming options, accessibility, and instruction. Numbers in the circle represent the number of times the topic was mentioned.

*Question 9: In a few words, please describe what you see as the (up to) top-3 areas of growth for the industry in general.*



## Business Areas of Growth

Youth and programs were the most cited areas for growth, often in conjunction. However, business growth saw more diversity in answer than the overall industry growth. Numbers in the circle represent the number of times the topic was mentioned.

*Question 7: In a few words, please describe what you see as the (up to) top-3 areas of growth for your specific business?*





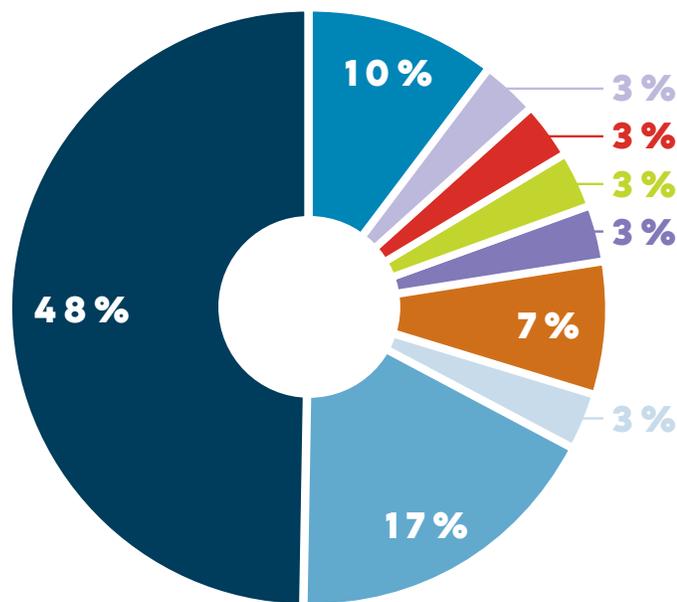
# FINANCIALS

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Gross Revenue .....	18
Revenue by Category .....	20
Product Prices .....	26
Expenses by Categories .....	27
Payroll Expenses .....	35

# GROSS REVENUE

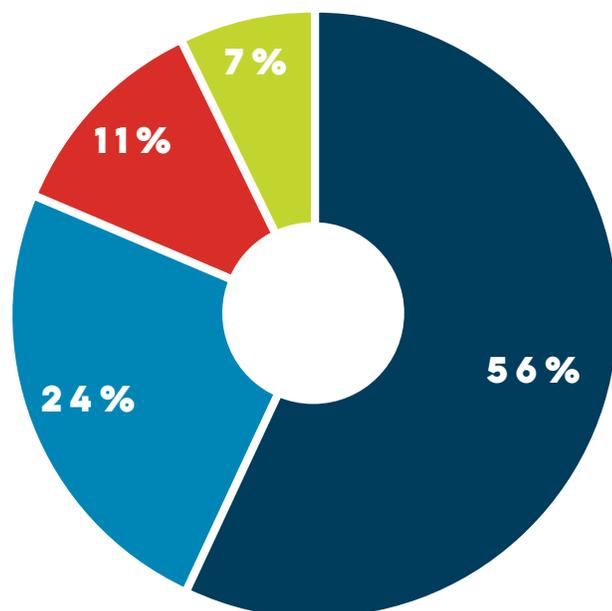
## Revenue Overview



Question 14: What was the gross revenue (total amount of sales prior to any deductions, for your first calendar year in business? (Please enter a number only, no "\$") n=29

- Less than \$10,000
- \$100,000 - \$124,999
- \$20,000 - \$34,999
- \$125,000 - \$199,999
- \$35,000 - \$49,999
- \$200,000 - \$299,999
- \$50,000 - \$74,999
- \$300,000 or more
- \$75,000 - \$99,999

**\$383,516** Average First Year Revenue  
**\$287,000** Median First Year Revenue



Question 31: What is the projected percent increase/decrease in gross annual revenue (minus sales tax) for this gym location in 2022? n=45

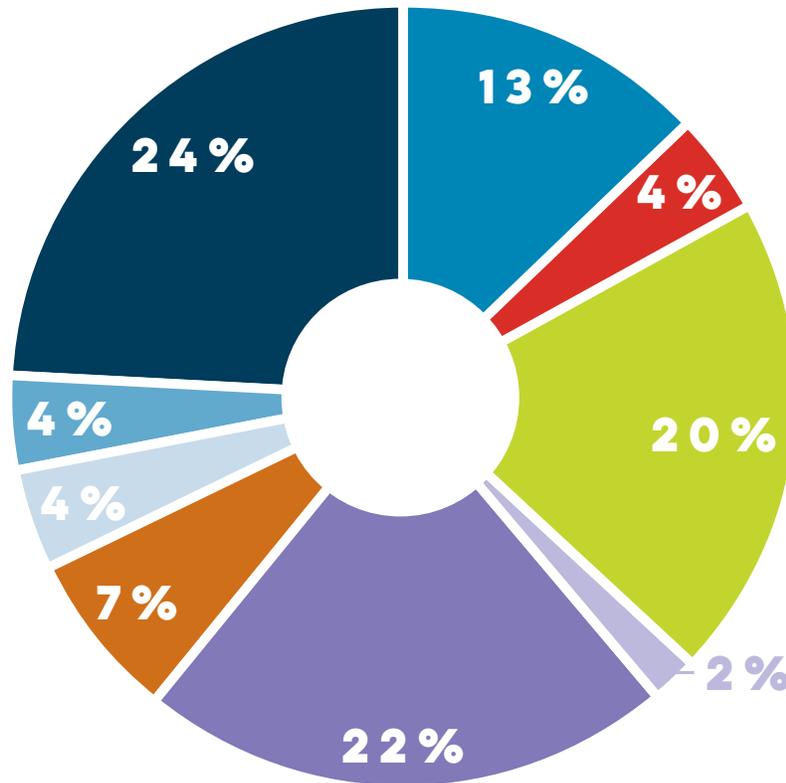
- 0 - 24%
- 25 - 49%
- 50 - 74%
- 75 - 100%

**27%** Average Projected Increase/Decrease in Revenue  
**20%** Median Projected Increase/Decrease in Revenue

# GROSS REVENUE

## Revenue Overview

*Total from Question 30: Please enter gross revenue (total amount of sales prior to any deductions) for 2021 for this gym location in the following categories. Enter "0" in fields that do not apply to this location.* n=46



- Less than \$100,000
- \$100,000 - \$199,999
- \$200,000 - \$349,999
- \$350,000 - \$499,999
- \$500,000 - \$749,999
- \$750,000 - \$999,999
- \$1,000,000 - \$1,249,999
- \$1,250,000 - \$1,499,999
- \$1,500,000 or more

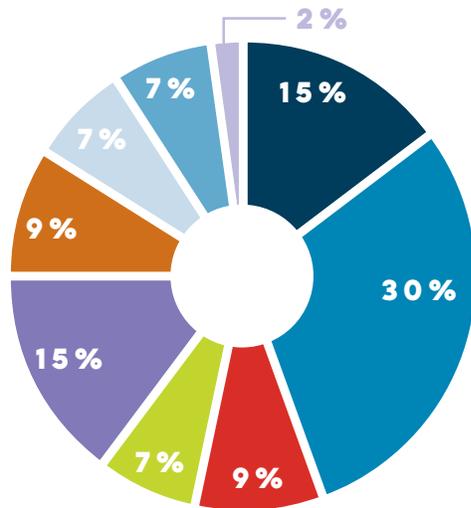
**AVERAGE GROSS REVENUE**  
**\$825,637**

# REVENUE BY CATEGORY

## 2021 Business Revenue by Category

Question 30: Please enter gross revenue (total amount of sales prior to any deductions) for 2021 for this gym location in the following categories. Enter "0" in fields that do not apply to this location. n=46

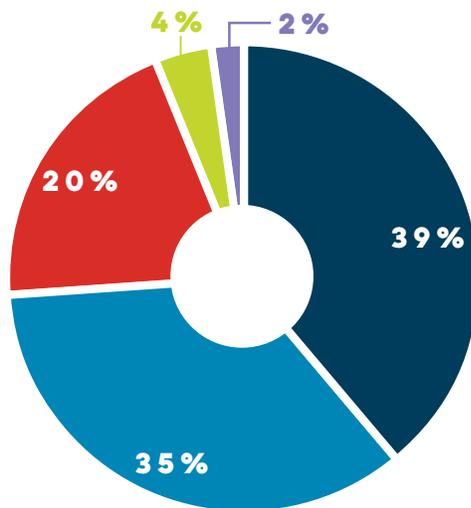
### MEMBERSHIP



- Less than \$100,000
- \$100,000 - \$199,999
- \$200,000 - \$349,999
- \$350,000 - \$499,999
- \$500,000 - \$749,999
- \$750,000 - \$999,999
- \$1,000,000 - \$1,249,999
- \$1,250,000 - \$1,499,999
- \$1,500,000 or more

**\$463,926** Average Membership Revenue  
**\$261,697** Median Membership Revenue

### DAY / PUNCH PASSES

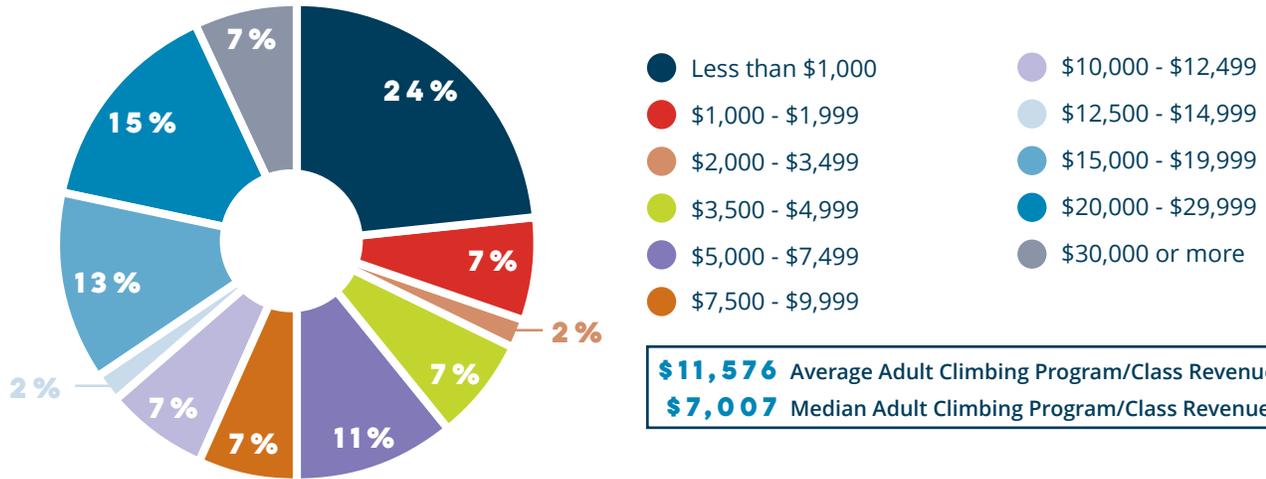


- Less than \$100,000
- \$100,000 - \$199,999
- \$200,000 - \$349,999
- \$350,000 - \$499,999
- \$500,000 - \$749,999

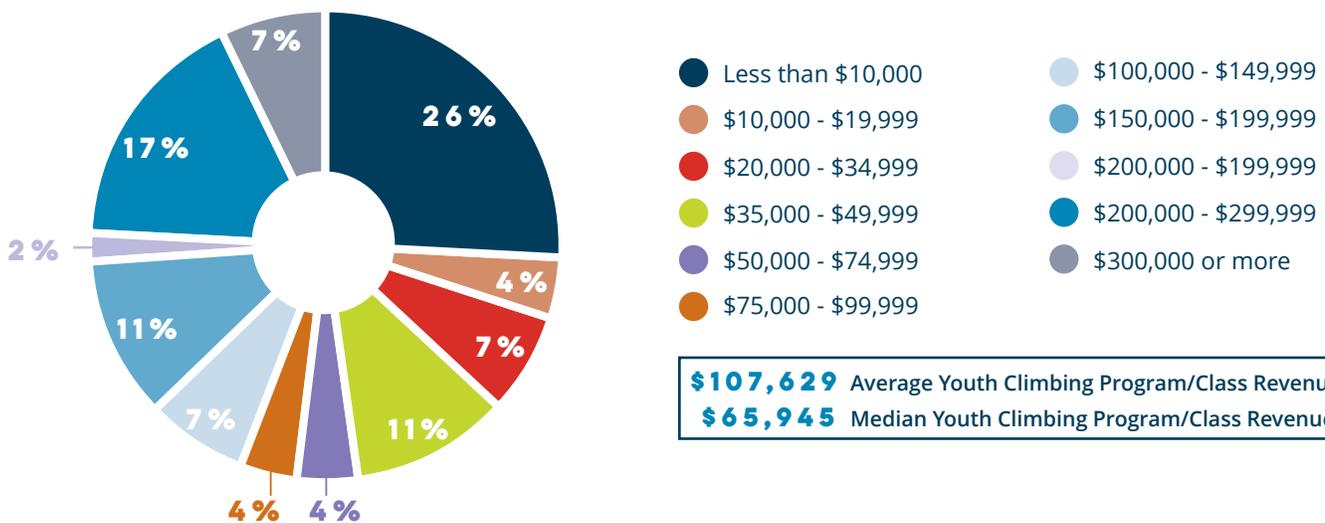
**\$146,611** Average Day/Punch Pass Revenue  
**\$140,613** Median Day/Punch Pass Revenue

# REVENUE BY CATEGORY

## ADULT CLIMBING PROGRAM / CLASS

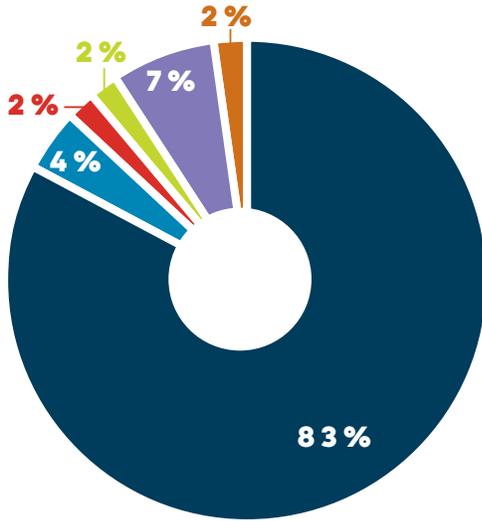


## YOUTH CLIMBING PROGRAM / CLASS



# REVENUE BY CATEGORY

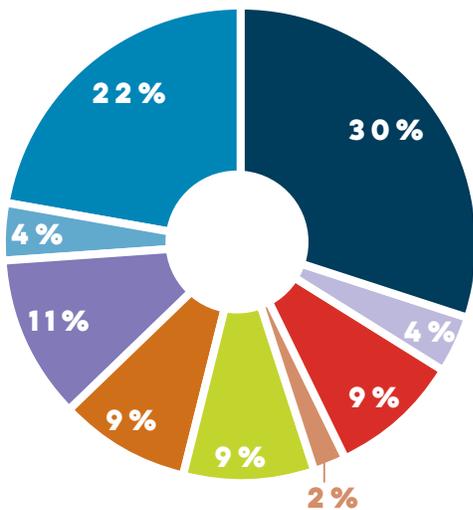
## OUTDOOR PROGRAM



- Less than \$1,000
- \$3,500 - \$7,499
- \$1,000 - \$1,999
- \$7,500 - \$9,999
- \$2,000 - \$3,499
- \$10,000 - \$12,499

**\$987** Average Outdoor Program Revenue

## GROUP SALES

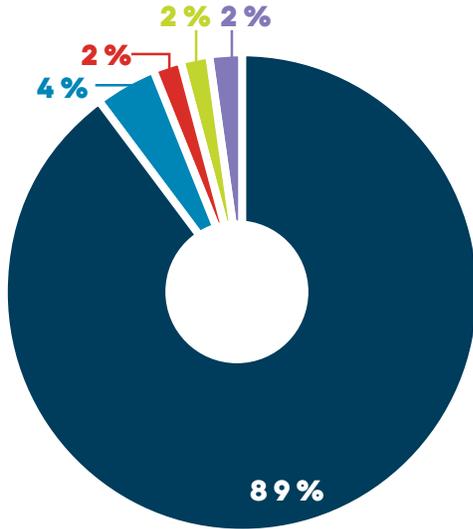


- Less than \$1,000
- \$10,000 - \$14,999
- \$1,000 - \$1,999
- \$15,000 - \$19,999
- \$2,000 - \$4,999
- \$20,000 - \$29,999
- \$5,000 - \$7,499
- \$30,000 or more
- \$7,500 - \$9,999

**\$14,500** Average Group Sales Revenue  
**\$9,050** Median Group Sales Revenue

# REVENUE BY CATEGORY

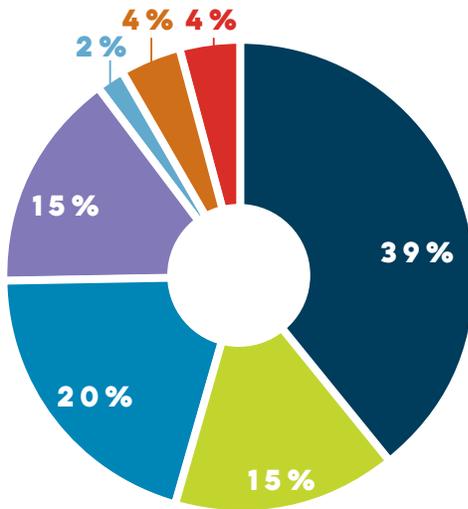
## NON-CLIMBING PROGRAM / CLASS



- Less than \$1,000
- \$1,000 - \$1,999
- \$2,000 - \$9,999
- \$10,000 - \$29,999
- \$30,000 or more

**\$1,572** Average Non-Climbing Program/Class Revenue

## GEAR RENTAL



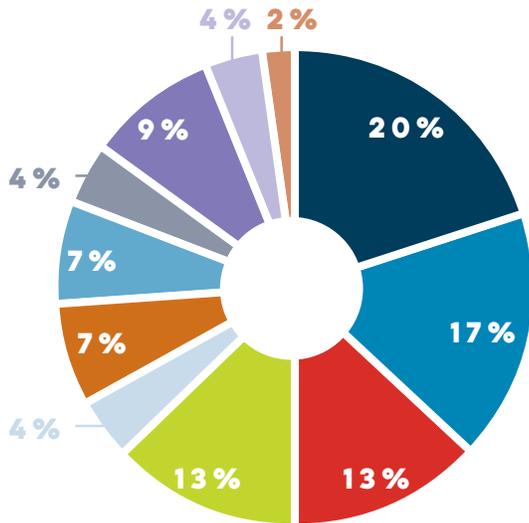
- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 - \$149,999

**\$25,592** Average Gear Rental Revenue

**\$18,286** Median Gear Rental Revenue

# REVENUE BY CATEGORY

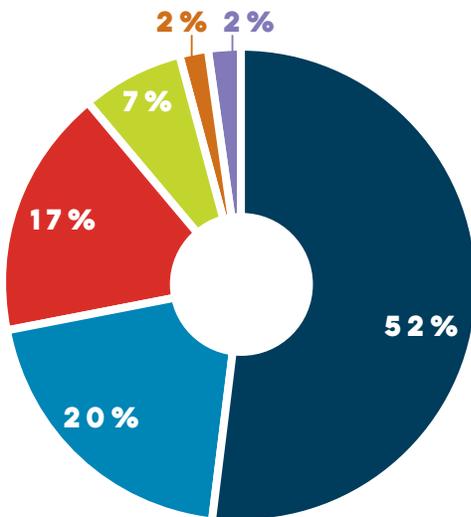
## RETAIL



- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 - \$124,999
- \$125,000 - \$149,999
- \$150,000 - \$199,999
- \$200,000 - \$299,999
- \$300,000 or more

**\$69,592** Average Retail Revenue  
**\$32,662** Median Retail Revenue

## FOOD AND BEVERAGE

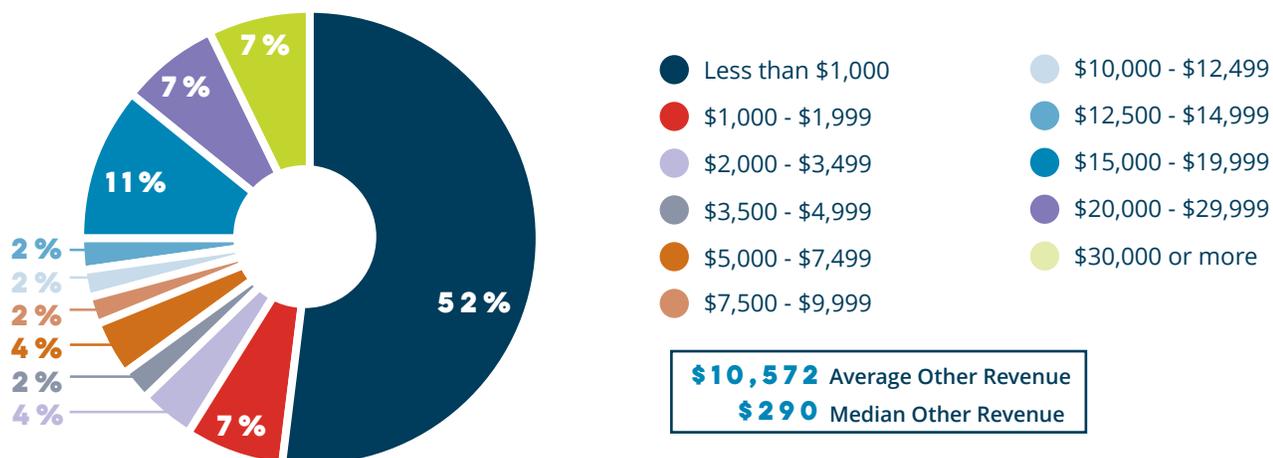


- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$49,999
- \$50,000 - \$99,999
- \$100,000 - \$299,999

**\$18,118** Average Food and Beverage Revenue  
**\$7,896** Median Food and Beverage Revenue

# REVENUE BY CATEGORY

## OTHER



# PRODUCT PRICES

## 2021 Membership Pricing

Question 34: Please enter the price of the following products for this gym location (number only; no \$ or decimals please; enter "0" in fields that do not apply to this location.)

● Average ● Median

	DAY PASS	10-PUNCH PASS	MONTHLY EFT	MONTHLY PREPAID	ANNUAL PREPAID
<b>SINGLE</b>	\$19	\$167	\$70	\$84	\$710
	\$19	\$155	\$69	\$86	\$660
<b>FAMILY</b>	\$33	N/A*	\$154	\$162	\$1,557
	\$33	N/A*	\$143	\$150	\$1,584
<b>DUAL</b>	\$32	\$280	\$107	\$132	\$1,157
	\$32	\$280	\$105	\$120	\$1,076
<b>CHILD</b>	\$14	\$124	\$52	\$102	\$524
	\$14	\$125	\$51	\$62	\$495
<b>TEEN</b>	\$16	\$134	\$65	\$122	\$624
	\$16	\$138	\$58	\$80	\$615
<b>STUDENT</b>	\$17	\$134	\$67	\$105	\$682
	\$18	\$150	\$60	\$81	\$623
<b>MILITARY</b>	\$16	\$129	\$62	\$74	\$636
	\$17	\$135	\$58	\$74	\$593
<b>OTHER</b>	\$13	\$161	\$51	\$81	\$595
	\$17	\$161	\$55	\$81	\$771

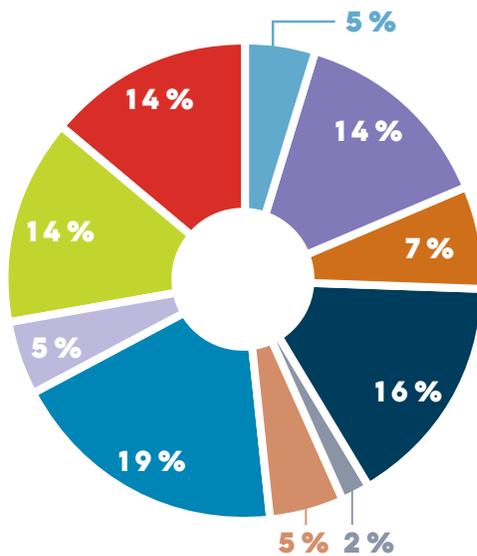
\*No Responses Submitted

# EXPENSES BY CATEGORIES

## 2021 Business Revenue by Category

Question 32: Please enter the 2021 expenses for the following categories: n=43

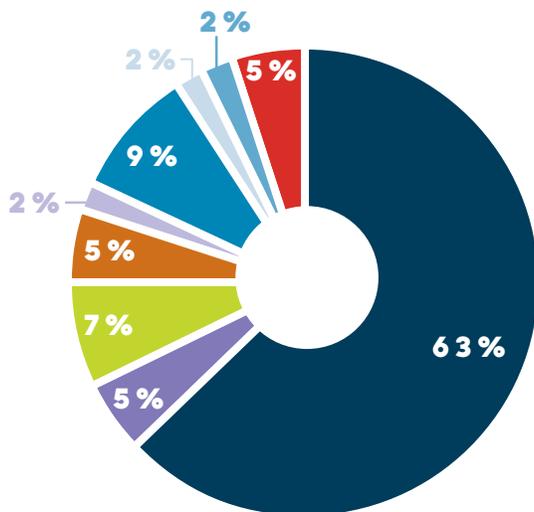
### LEASE / MORTGAGE PAYMENT



- Less than \$19,999
- \$100,000 - \$124,000
- \$20,000 - \$34,999
- \$125,000 - \$149,999
- \$35,000 - \$49,999
- \$150,000 - \$199,999
- \$50,000 - \$74,999
- \$200,000 - \$299,999
- \$75,000 - \$99,999
- \$300,000 or more

**\$135,163** Average Lease/Mortgage Expense  
**\$125,000** Median Lease/Mortgage Expense

### DEBT SERVICE

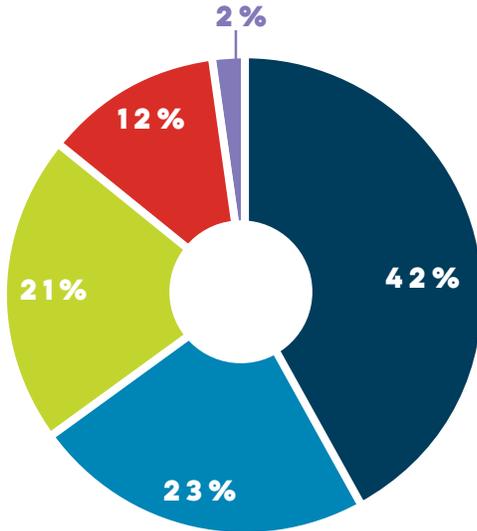


- Less than \$10,000
- \$75,000 - \$99,999
- \$10,000 - \$19,999
- \$100,000 - \$124,000
- \$20,000 - \$34,999
- \$125,000 - \$149,999
- \$35,000 - \$49,999
- \$150,000 - \$299,999
- \$50,000 - \$74,999

**\$32,471** Average Debt Service Expense  
**\$3,200** Median Debt Service Expense

# EXPENSES BY CATEGORIES

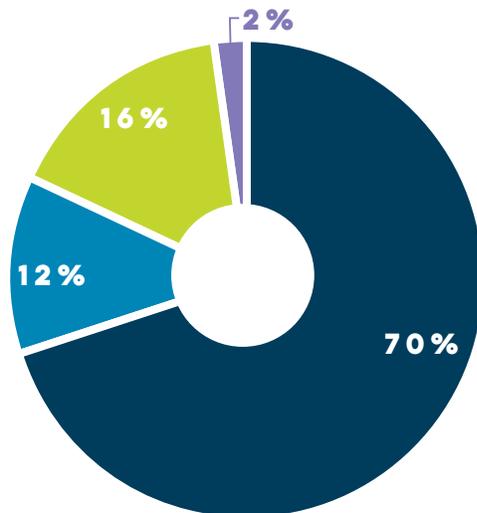
## UTILITIES



- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$49,999
- \$50,000 - \$74,999

**\$16,333** Average Utility Expense  
**\$13,287** Median Utility Expense

## HOLD / VOLUMES PURCHASE

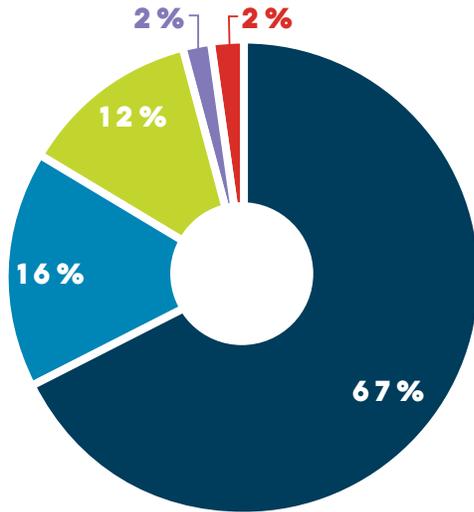


- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$74,999

**\$9,220** Average Hold/Volumes Purchase Expense  
**\$5,000** Median Hold/Volumes Purchase Expense

# EXPENSES BY CATEGORIES

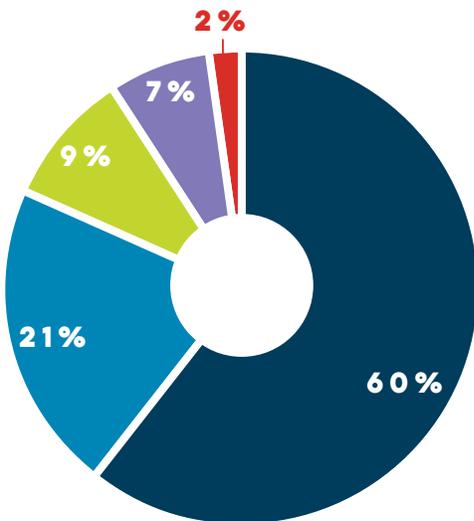
## NON-CLIMBING / VALUE ADDED IMPROVEMENTS



- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$99,999
- \$100,000 - \$124,999

**\$9,398** Average Non-Climbing/Value Added Improvement Expense  
**\$2,500** Median Non-Climbing/Value Added Improvement Expense

## CLEANING / CUSTODIAL / JANITORIAL

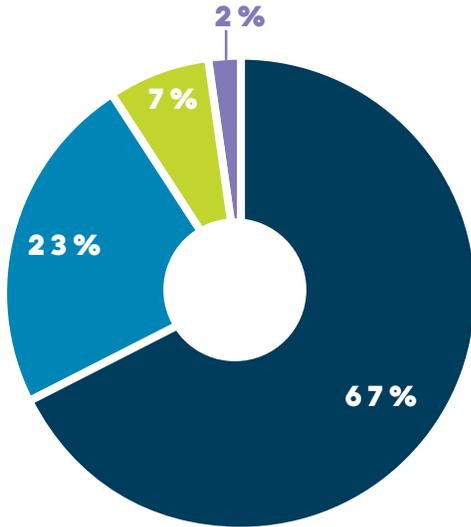


- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$49,999
- \$50,000 - \$74,999

**\$11,477** Average Cleaning/Custodial/Janitorial Expense  
**\$5,871** Median Cleaning/Custodial/Janitorial Expense

# EXPENSES BY CATEGORIES

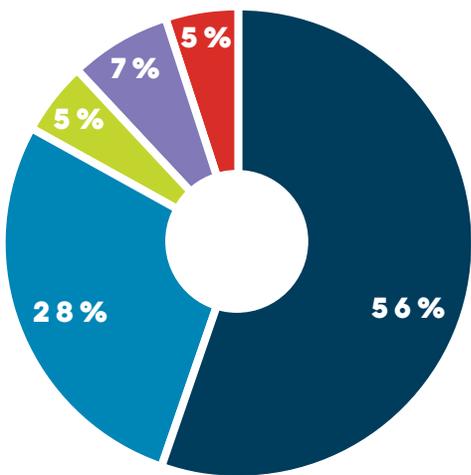
## MAINTENANCE AND REPAIR



- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$74,999

**\$8,895** Average Maintenance and Repair Expense  
**\$6,000** Median Maintenance and Repair Expense

## MARKETING / PROMOTIONS

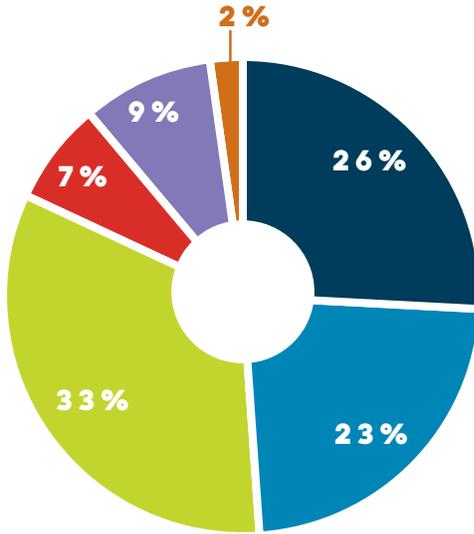


- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$49,999
- \$50,000 - \$74,999

**\$11,878** Average Marketing/Promotion Expense  
**\$7,400** Median Marketing/Promotion Expense

# EXPENSES BY CATEGORIES

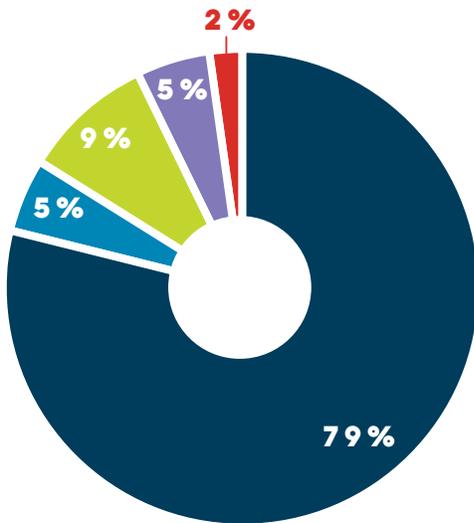
## INSURANCE



- Less than \$10,000
- \$35,000 - \$49,999
- \$10,000 - \$19,999
- \$50,000 - \$99,999
- \$20,000 - \$34,999
- \$100,000 - \$149,999

**\$24,084** Average Insurance Expense  
**\$21,594** Median Insurance Expense

## FEDERAL TAXES

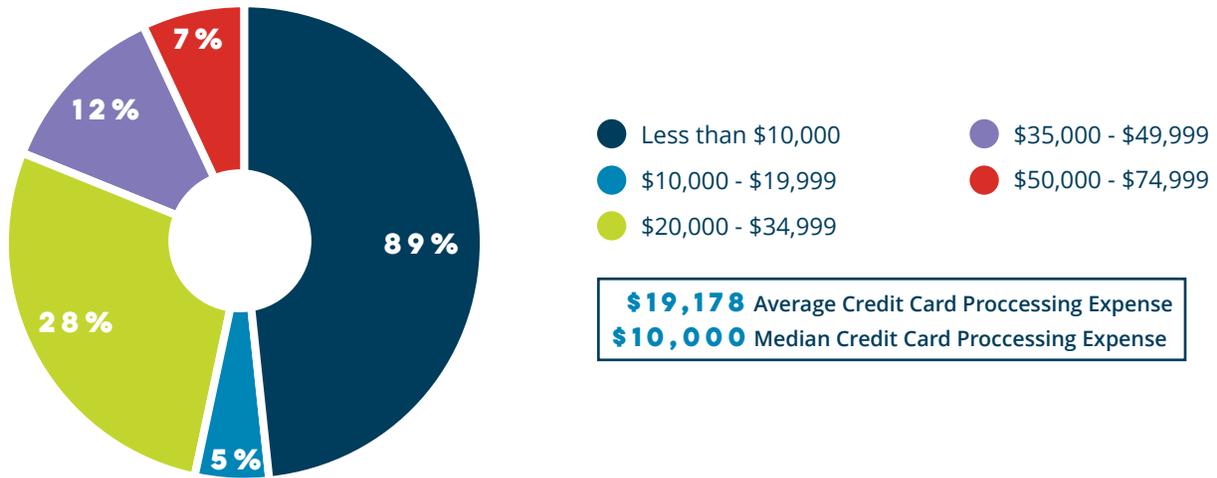


- Less than \$10,000
- \$35,000 - \$74,999
- \$10,000 - \$19,999
- \$75,000 - \$124,999
- \$20,000 - \$34,999

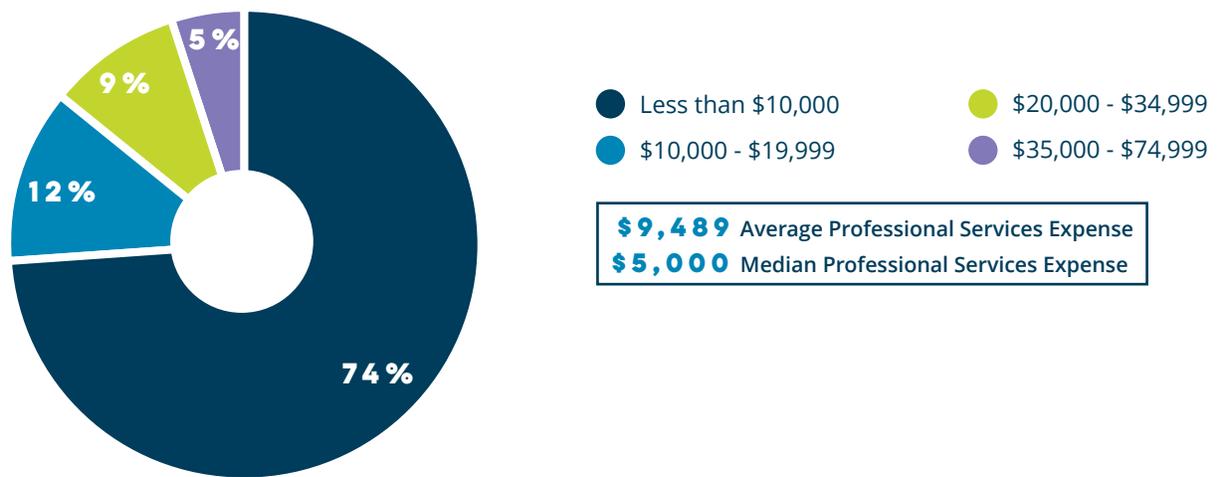
**\$10,079** Average Federal Tax Expense

# EXPENSES BY CATEGORIES

## CREDIT CARD PROCESSING FEES

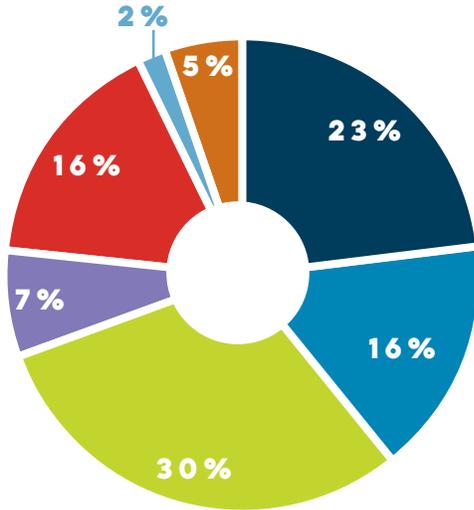


## PROFESSIONAL SERVICES



# EXPENSES BY CATEGORIES

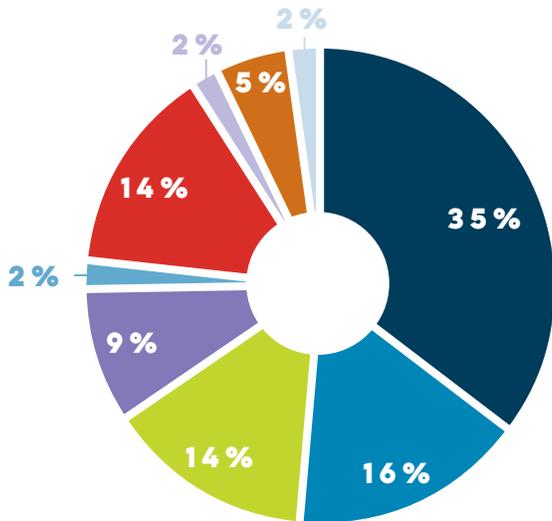
## TOTAL PAYROLL



- Less than \$100,000
- \$100,000 - \$199,999
- \$200,000 - \$349,999
- \$350,000 - \$499,999
- \$500,000 - \$749,999
- \$750,000 - \$999,999
- \$1,000,000 - \$1,249,999

**\$309,373** Average Total Payroll Expense  
**\$227,057** Median Total Payroll Expense

## RETAIL STOCK

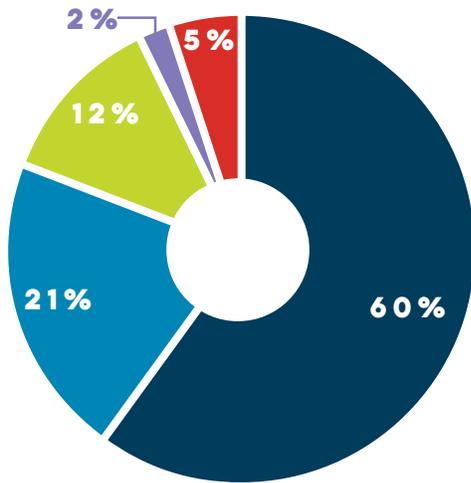


- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 - \$124,999
- \$125,000 - \$199,999
- \$200,000 - \$299,999
- \$300,000 or more

**\$44,010** Average Retail Stock Expense  
**\$16,500** Median Retail Stock Expense

# EXPENSES BY CATEGORIES

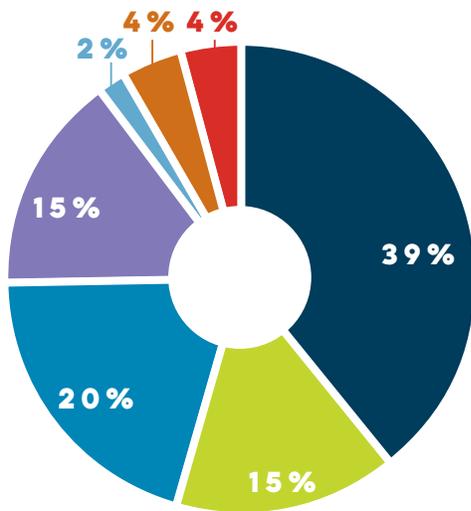
## CLIMBING RELATED CONSUMABLES



- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$49,999
- \$50,000 - \$74,999

**\$10,583** Average Climbing Related Consumables Expense  
**\$6,500** Median Climbing Related Consumables Expense

## OTHER



- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$34,999
- \$35,000 - \$99,999
- \$100,000 - \$299,999
- \$300,000 or more

**\$18,353** Average Other Expense

# PAYROLL EXPENSES

## 2021 Payroll Expenses and Staff Tenure

Question 33: Please enter the amount spent in 2021 on the following payroll expenses including independent contractors for this gym location (number only and round to nearest dollar; no \$ or decimals necessary, enter "0" in fields that do not apply to this location.)

● Average ● Median

	PAY	TENURE
<b>OWNER</b>	\$110,128	13.3 years
	\$84,000	14.0 years
<b>NON-OWNER MANAGEMENT</b>	\$96,259	6.4 years
	\$67,068	5.0 years
<b>FRONT DESK STAFF</b>	\$134,972	1.6 years
	\$120,000	1.5 years
<b>INSTRUCTIONAL STAFF</b>	\$68,562	3.6 years
	\$40,000	2.0 years
<b>INSTRUCTIONAL STAFF - OTHER PROGRAMS</b>	\$64,298	3.1 years
	\$52,000	2.5 years
<b>ROUTESETTERS</b>	\$54,432	4.4 years
	\$35,035	3.0 years
<b>ADMINISTRATIVE STAFF</b>	\$19,456	13.2 years
	\$13,074	4.0 years
<b>STAFF TRAINING</b>	\$12,167	8.4 years
	\$7,000	2.0 years
<b>OTHER</b>	\$24,651	2.0 years
	\$1,500	2.0 years



# MEMBERSHIP

---

Membership Numbers..... 37

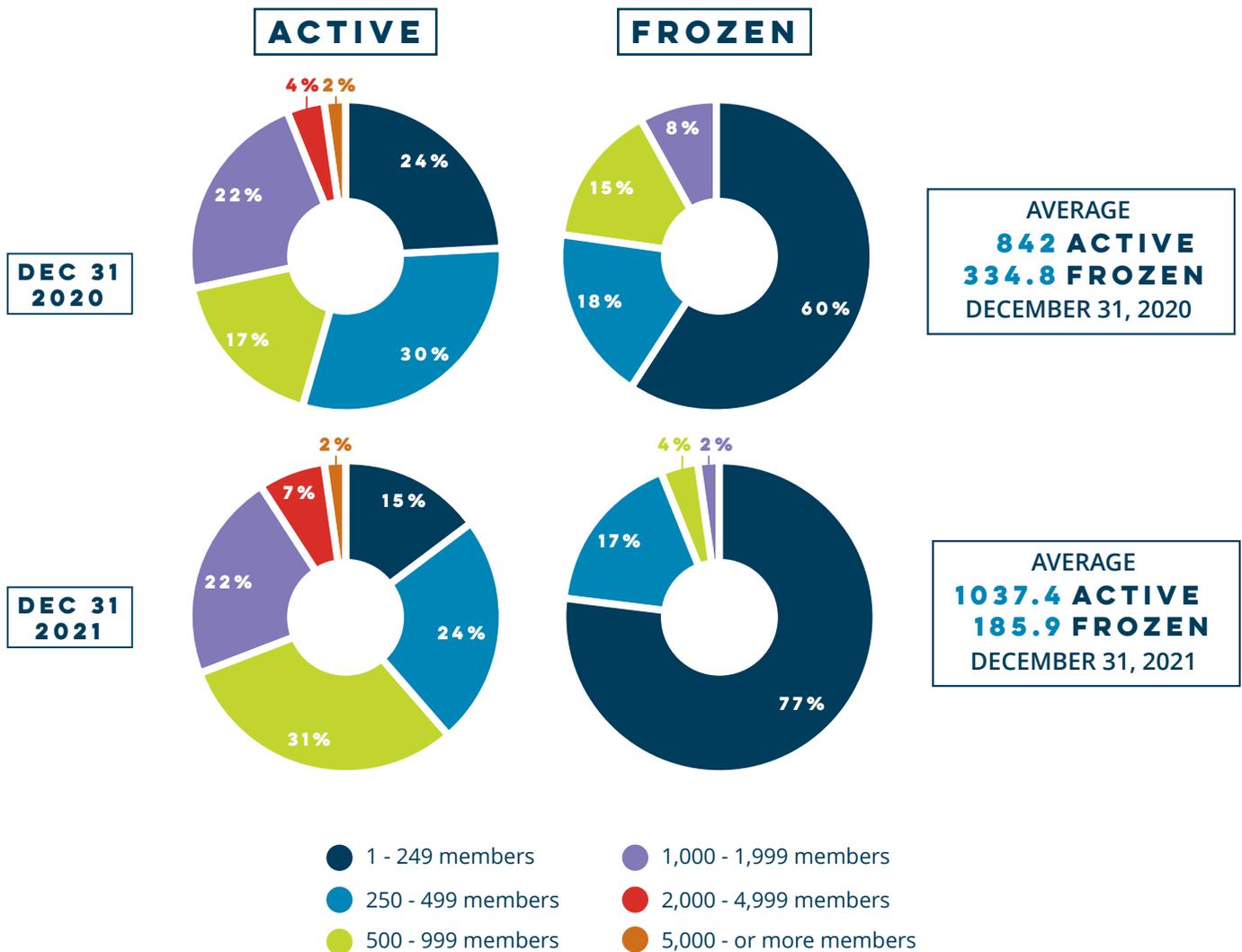
Check-Ins & First time visitors ..... 38

Member Retention..... 39

# MEMBERSHIP NUMBERS

## Active vs Frozen Members

Question 16: How many active members did you have on December 31, 2020 and December 31, 2021?  
How many frozen members did you have on December 31, 2020 and December 31, 2021?

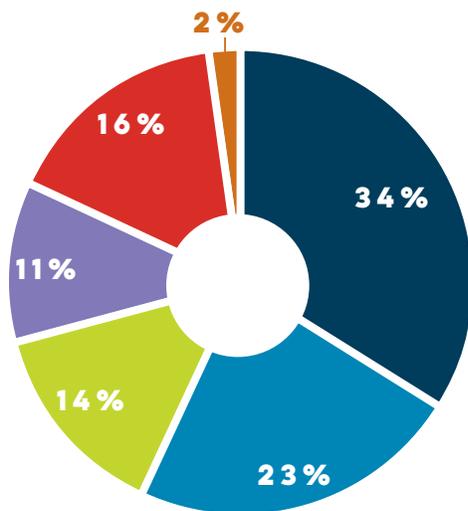


# CHECK-INS & FIRST TIME VISITORS

## Number of Check-Ins and New Waivers Created

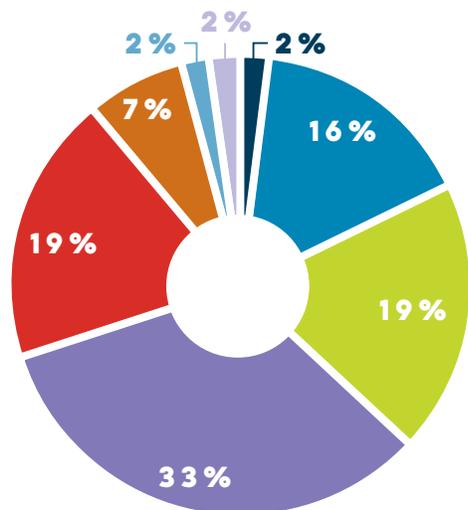
Question 18: Please provide the number of check-ins for the 2021 calendar year: Total number of check-ins and number of first time visitors (new waiver created). n=44

### CHECK-INS



- 0 - 24,999 check-ins
- 75,000 - 99,999 check-ins
- 25,000 - 49,999 check-ins
- 100,000 - 149,000 check-ins
- 50,000 - 74,999 check-ins
- 250,000 - 499,999 check-ins

### FIRST TIME VISITORS

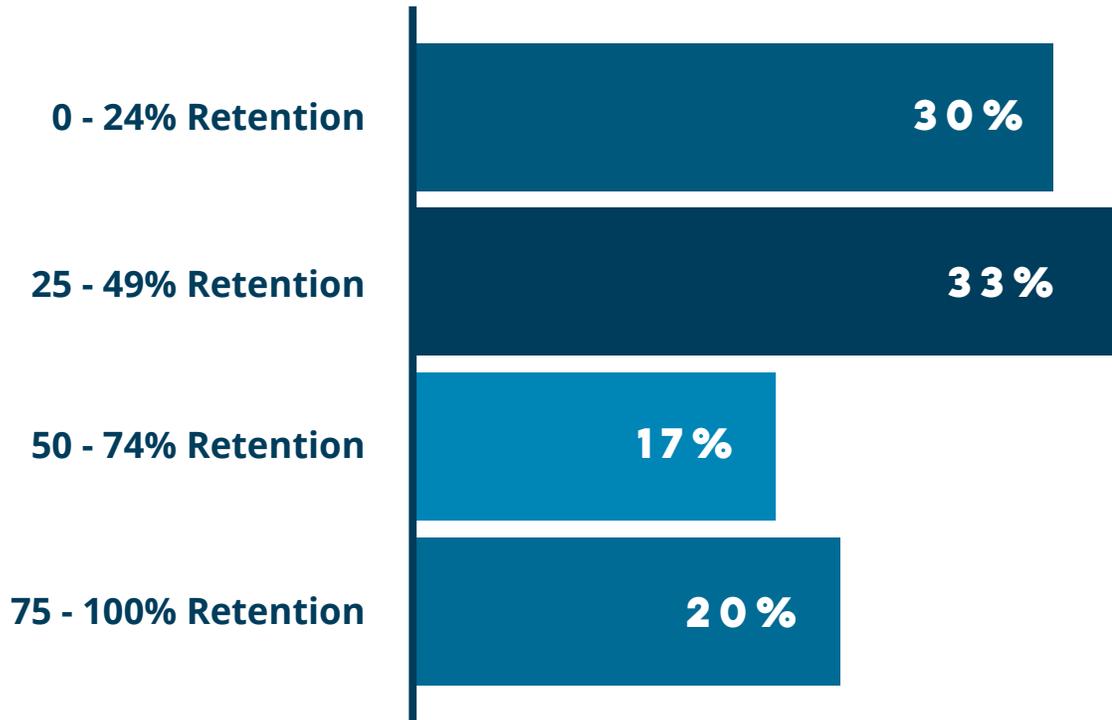


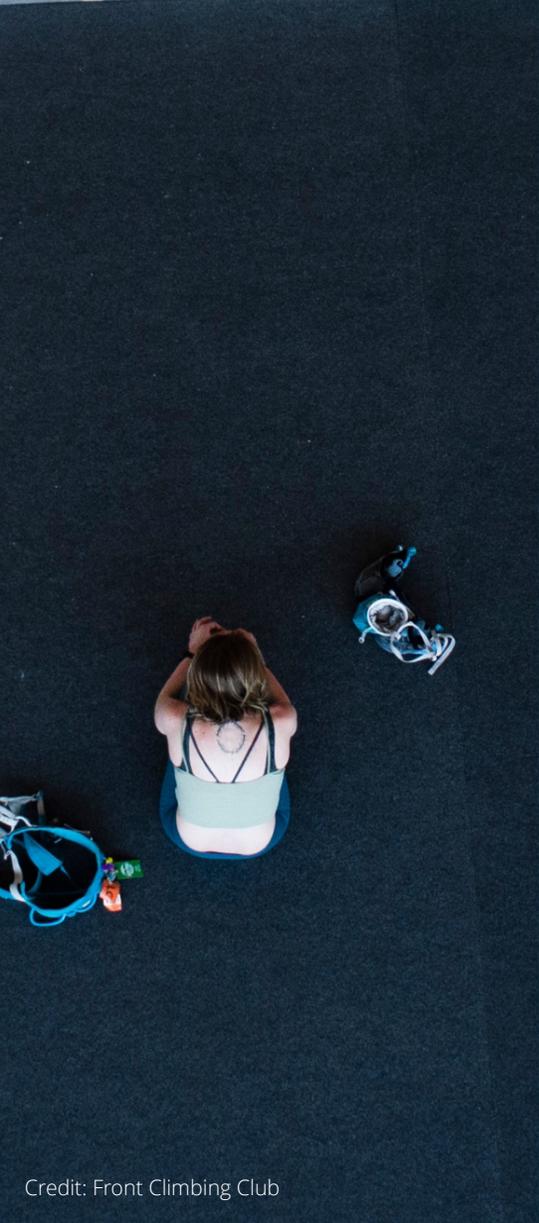
- 0 - 499 new waivers
- 10,000 - 14,999 new waivers
- 1,000 - 2,400 new waivers
- 15,000 - 24,999 new waivers
- 2,500 - 4,999 new waivers
- 25,000 - 49,999 new waivers
- 5,000 - 9,999 new waivers
- 50,000 or more new waivers

# MEMBER RETENTION

## Average Retention Percentage

Question 17: What was your average member retention rate for 2021? n=30





# FACILITY

---

Facility Size Surface Areas.....	41
Bouldering / Rope Climbing Walls .....	42
Climbing Equipment.....	43
Facility Offerings .....	44
Auxiliary Services Provided.....	45

# FACILITY SIZE SURFACE AREAS

## Size of Facility and Climbing Space

Question 25: Building footprint (as reported on your lease or tax report).

Question 26: What is that additional square footage?

Question 28: Please provide the following information about the surface area and height of this gym's bouldering/rope climbing walls. Enter "0" in fields that do not apply to this location.

Question 29: Please provide the following information about the surface area and height of this gym's bouldering/climbing walls. Enter "0" in fields that do not apply to this location.

● Average ● Median

	ALL RESPONSES	BOULDERING ONLY	FULL SERVICE
<b>BUILDING FOOTPRINT SQUARE FOOTAGE</b>	12,937.4	10,700	13,649
	10,600	7,750	11,000
<b>ADDITIONAL SQUARE FOOTAGE</b>	2,817	2,000	2,860
	2,497	2,000	2,994
<b>BOULDERING SURFACE SQUARE FOOTAGE</b>	93.5	106.3	89.4
	92.5	117	85
<b>BOULDERING WALL MAX HEIGHT (FEET)</b>	15.2	15.9	15
	15	16	15
<b>BOULDERING WALL BASE (LINEAR FEET)</b>	250.5	329.8	226.3
	200	250	177.5
<b>CLIMBABLE SURFACE SQUARE FOOTAGE</b>	10315.6	N/A	10315.6
	8650	N/A	8650
<b>ROPE CLIMBING WALL MAX HEIGHT</b>	42.7	N/A	42.7
	35	N/A	35
<b>NUMBER OF BOULDER PROBLEMS SET</b>	93.5	106.3	89.4
	92.5	117	85

# BOULDERING / ROPE CLIMBING WALLS

## Anchors, Belays, and Routes

Question 20: How many auto-belay systems are installed at this gym?

● Average ● Median

<b>AUTO-BELAY SYSTEMS INSTALLED</b>	8.3
	7.0

Question 27: Enter the number of anchors and routes per anchor for each of the following in this gym. Enter "0" in any fields that do not apply to this location.

● Average ● Median

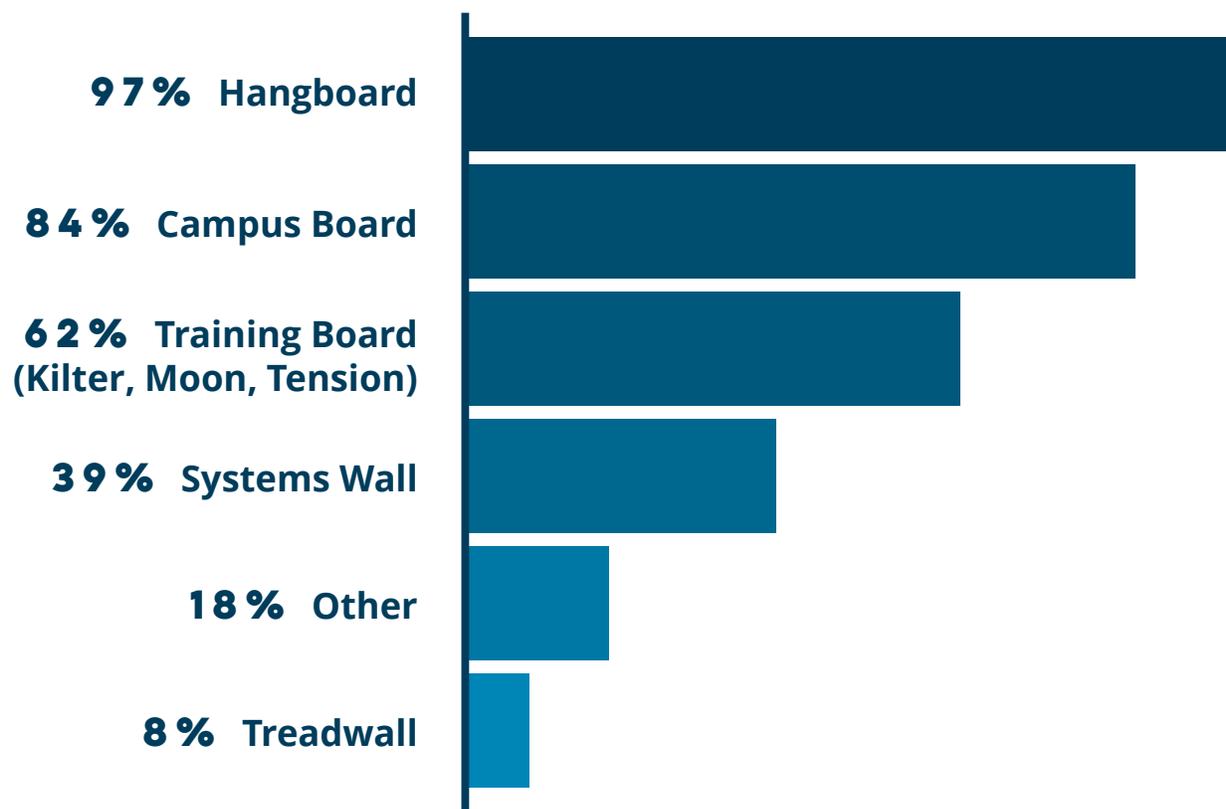
<b>TOP ROPE-ONLY ANCHORS</b>	30.3
	26
<b>ROUTES PER TOP ROPE-ONLY ANCHORS</b>	2.3
	2
<b>LEAD-ONLY ANCHORS</b>	13.8
	10
<b>ROUTES FOR LEAD-ONLY ANCHORS</b>	2.8
	2
<b>COMBINED TOP ROPE AND LEAD ANCHORS</b>	23.9
	13
<b>ROUTES FOR COMBINED TOP ROPE AND LEAD ANCHORS</b>	5.3
	2

# CLIMBING EQUIPMENT

## Climbing Specific Equipment

Question 21: What climbing specific training equipment is available at this gym?

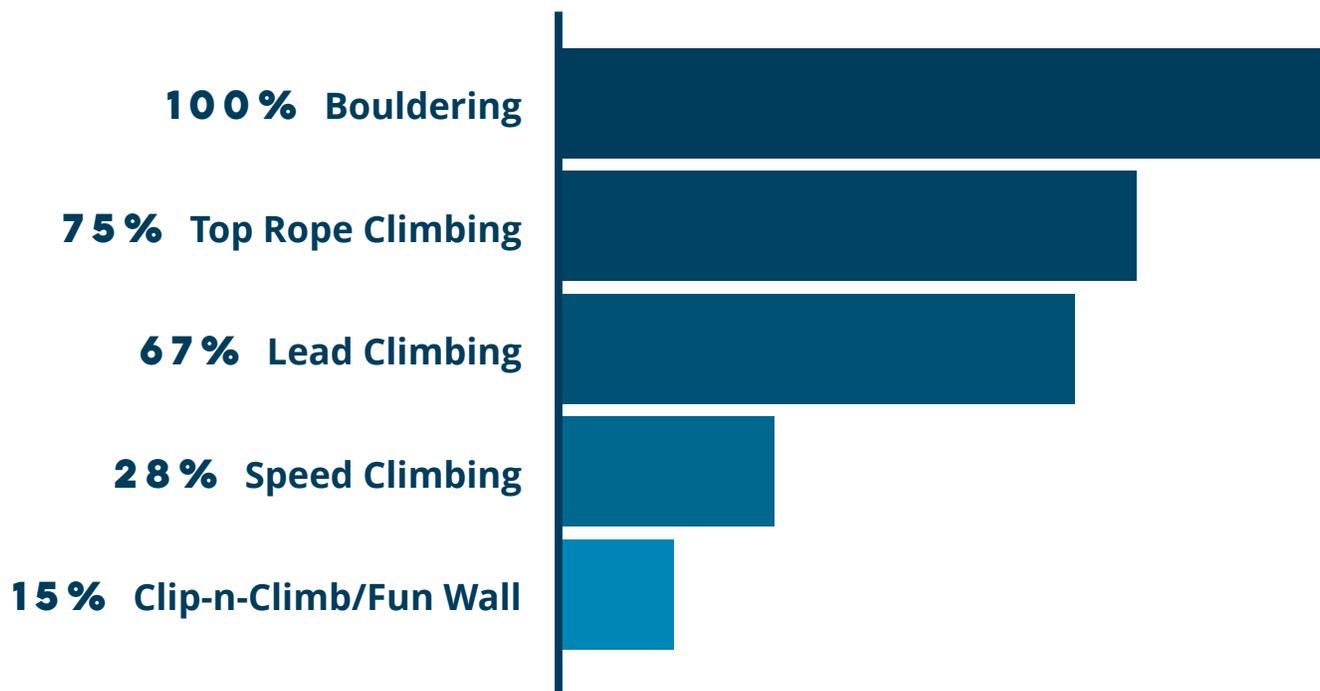
Please check all that apply. n=61



# FACILITY OFFERINGS

## Different Climbing Services Provided

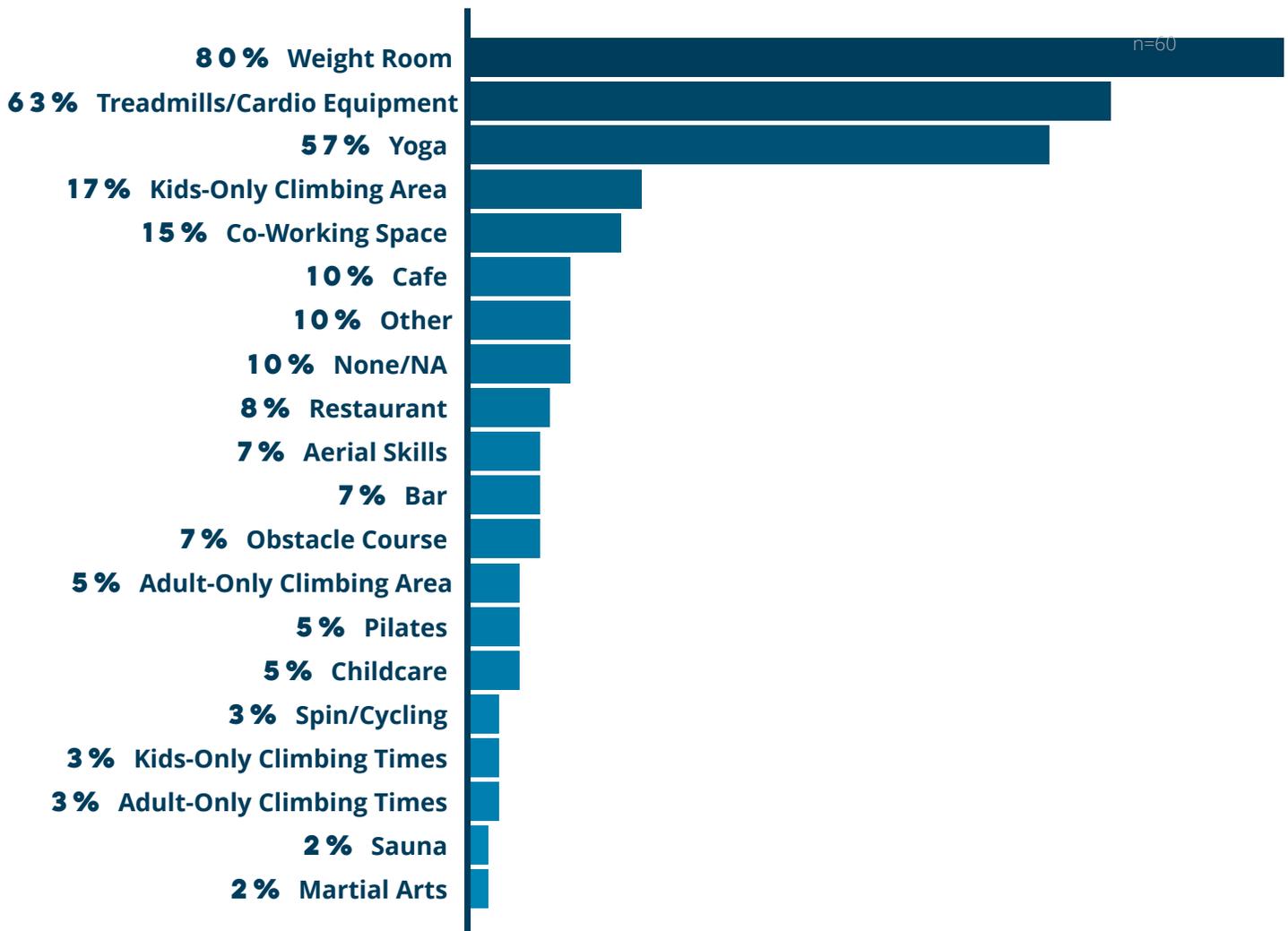
Question 19: What climbing offerings are available at this gym? Please check all that apply. n=61



# AUXILIARY SERVICES PROVIDED

## Different Auxiliary Services Provided

Question 22: What auxiliary offerings are available at this gym? Please check all that apply.





# APPENDICES

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Additional Resources.....	47
Acknowledgements .....	48
Industry Survey Questions.....	49

# APPENDIX

# ADDITIONAL RESOURCES

For further information on the climbing industry, additional resources are available from the following organizations:

- Access Fund, [www.accessfund.org](http://www.accessfund.org)
- American Alpine Club, [www.americanalpineclub.org](http://www.americanalpineclub.org)
- American Mountain Guides Association, [www.amga.com](http://www.amga.com)
- Association of British Climbing Walls, [www.abcwalls.co.uk](http://www.abcwalls.co.uk)
- Climbing Business Journal, [www.climbingbusinessjournal.com](http://www.climbingbusinessjournal.com)
- Climbing Escalade Canada, [www.climbingcanada.ca](http://www.climbingcanada.ca)
- Climbing Wall Association, [www.cwapro.org](http://www.cwapro.org)
- International Federation of Sport Climbing, [www.ifsc-climbing.org](http://www.ifsc-climbing.org)
- Outdoor Industry Association, [www.outdoorindustry.org](http://www.outdoorindustry.org)
- USA Climbing, [www.usaclimbing.org](http://www.usaclimbing.org)

# APPENDIX

# ACKNOWLEDGEMENTS

This report would not have been possible without the support and expertise of many contributors.

- CWA Research Advisory Committee
- Committee Chair: Doug Cosby, Inner Peaks, Inc.
- Kenneth Cronin, Crag X Indoor Climbing Inc.
- Alex Fleming, Mesa Rim Climbing & Fitness
- Hilary Harris, EVO Rock + Fitness, Inc.
- Alexandra Hristova, Walltopia AD
- Rob Moore, Climb NuLu / Hoosier Heights
- Rory O’Leary, Asana Climbing Gym, Inc.
- Mike St. Laurent, Triangle Rock Club
- Tim Wetherill, Stonetree Climbing Center
- Blair Williams, EDELRID

This survey and summary data analysis were carried out by RRC Associates of Boulder, Colo..

## GET IN TOUCH!

Have questions, feedback, or interest in getting involved?  
Reach out to the CWA at: [hello@cwapro.org](mailto:hello@cwapro.org).

# APPENDIX

# INDUSTRY SURVEY QUESTIONS

## 2022 Indoor Climbing Industry Study

This survey is part of the CWA's continued efforts to publish an industry report that will serve as a valuable resource for our members. These results will be helpful to you in understanding where your operation stacks up against similar organizations, and can help identify areas of strength and of underperformance relative to industry norms. All participating climbing gyms will receive a free copy of the final industry report.

As we continue to emerge from the Covid-19 pandemic, your input is more valuable than ever. The CWA continues its efforts to characterize the indoor climbing industry as a whole, as well as to show the resilience and vitality of our industry as we come out of these unprecedented times.

If you have any questions about the survey, please feel free to reach out to [details omitted from report]

### *Confidentiality Statement*

The survey data requested and collected from both individual climbing walls/gyms, as well as climbing walls/gyms as part of a broader corporation, will be maintained strictly confidential. This survey data will only be used as part of a broader, aggregated data set of climbing wall/gym information that is compiled, analyzed, and published for industry use, and evaluated by categories of business operations. This aggregated data will be published in a CWA report and presented at the 2022 CWA Summit. RRC Associates is the only entity that will have access to climbing wall/gym-specific data, and only a limited number of authorized employees of RRC Associates will be permitted to access this data; CWA's staff, directors, members, agents or contractors, will not be permitted access to underlying, climbing wall/gym-specific data. Unless compelled by statute, regulation, law, or any court of competent jurisdiction, climbing wall/gym-specific survey data obtained from a climbing wall/gym (or climbing walls/gyms as part of a corporation) that names or identifies that individual climbing wall/gym or corporation will not be released.

# APPENDIX

# INDUSTRY SURVEY QUESTIONS

1. Do you own/operate a commercial climbing facility in the USA or Canada? For the purposes of this study, climbing walls in general fitness facilities, recreational facilities, community centers, colleges/universities, etc. are not considered commercial climbing facilities.  
 Yes  No
2. Which of the following best describes your company?  
 Single gym location operator  
 Multi gym location operator - number of gyms: \_\_\_\_\_
3. Which of the following best describes your company in regards to Work-at-Height policies/plans?  
 Multi-location owner with a company-wide Work-at-Height policy/plan that applies to all locations  
 Multi-location owner that has Work-at-Height policy/plan at some, but not all locations  
 Single location owner with a work a Work-at-Height policy/plan  
 My company does not have a Work-at-Height policy/plan  
 Don't know
4. Which of the following did you consult in creating your Work-at-Height policy/plan?  
(check all that apply)  
 Other climbing company owners  
 Attorney  
 Textbooks  
 Conference presentations  
 Textbooks  
 CWA Work-at-Height program  
 Other Work-at-Height program  
 Other  
 None/NA

# APPENDIX

## INDUSTRY SURVEY QUESTIONS

5. Does your company use written curricula/criteria for the following?

	Yes	No	Don't Know
<b>Bouldering Classes</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Technique Classes</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Belay/Lead Belay Classes</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Belay/Lead Belay Testing</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Climbing Training Programs (strength, cross-training, boards, etc.)</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Outdoor Technical Training</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*The next few questions will ask about challenges and growth for your business and the climbing industry. Please provide brief descriptions.*

6. In a few words, please describe what you see as the (up to) top-3 challenges for your specific business?

Challenge #1 for your business: \_\_\_\_\_

Challenge #2 for your business: \_\_\_\_\_

Challenge #3 for your business: \_\_\_\_\_

7. In a few words, please describe what you see as the (up to) top-3 areas of growth for your specific business?

Area of growth #1 for your business: \_\_\_\_\_

Area of growth #2 for your business: \_\_\_\_\_

Area of growth #3 for your business: \_\_\_\_\_

# APPENDIX

# INDUSTRY SURVEY QUESTIONS

8. In a few words, please describe what you see as the (up to) top-3 challenges facing the industry in general.

Industry challenge #1: \_\_\_\_\_

Industry challenge #2: \_\_\_\_\_

Industry challenge #3: \_\_\_\_\_

9. In a few words, please describe what you see as the (up to) top-3 areas of growth for the industry in general.

Industry growth #1: \_\_\_\_\_

Industry growth #2: \_\_\_\_\_

Industry growth #3: \_\_\_\_\_

10. Please enter the number of separate gym locations your company operates. Enter the number - i.e. - 1, 2, 3, etc. Please do not spell out "one," "two," "three," etc.

\_\_\_\_\_

## Gym-specific questions

*(Remember, your data is completely confidential)\**

### 11. State/Province

- |                                      |  |   |   |
|--------------------------------------|--|---|---|
| <input type="checkbox"/> Alabama     | <input type="checkbox"/> Kentucky      | <input type="checkbox"/> North Carolina | <input type="checkbox"/> Wisconsin                      |
| <input type="checkbox"/> Alaska      | <input type="checkbox"/> Louisiana     | <input type="checkbox"/> North Dakota   | <input type="checkbox"/> Wyoming                        |
| <input type="checkbox"/> Arizona     | <input type="checkbox"/> Maine         | <input type="checkbox"/> Ohio           | <input type="checkbox"/> Alberta                        |
| <input type="checkbox"/> Arkansas    | <input type="checkbox"/> Maryland      | <input type="checkbox"/> Oklahoma       | <input type="checkbox"/> British Columbia               |
| <input type="checkbox"/> California  | <input type="checkbox"/> Massachusetts | <input type="checkbox"/> Oregon         | <input type="checkbox"/> Manitoba                       |
| <input type="checkbox"/> Colorado    | <input type="checkbox"/> Michigan      | <input type="checkbox"/> Pennsylvania   | <input type="checkbox"/> CA - New Brunswick             |
| <input type="checkbox"/> Connecticut | <input type="checkbox"/> Minnesota     | <input type="checkbox"/> Rhode Island   | <input type="checkbox"/> CA - Newfoundland and Labrador |
| <input type="checkbox"/> Delaware    | <input type="checkbox"/> Mississippi   | <input type="checkbox"/> South Carolina | <input type="checkbox"/> CA - Nova Scotia               |
| <input type="checkbox"/> Florida     | <input type="checkbox"/> Missouri      | <input type="checkbox"/> South Dakota   | <input type="checkbox"/> CA - Ontario                   |
| <input type="checkbox"/> Georgia     | <input type="checkbox"/> Montana       | <input type="checkbox"/> Tennessee      | <input type="checkbox"/> CA - Prince Edward Island      |
| <input type="checkbox"/> Hawaii      | <input type="checkbox"/> Nebraska      | <input type="checkbox"/> Texas          | <input type="checkbox"/> CA - Quebec                    |
| <input type="checkbox"/> Idaho       | <input type="checkbox"/> Nevada        | <input type="checkbox"/> Utah           | <input type="checkbox"/> CA - Saskatchewan              |
| <input type="checkbox"/> Illinois    | <input type="checkbox"/> New Hampshire | <input type="checkbox"/> Vermont        |   |
| <input type="checkbox"/> Indiana     | <input type="checkbox"/> New Jersey    | <input type="checkbox"/> Virginia       |   |
| <input type="checkbox"/> Iowa        | <input type="checkbox"/> New Mexico    | <input type="checkbox"/> Washington     |   |
| <input type="checkbox"/> Kansas      | <input type="checkbox"/> New York      | <input type="checkbox"/> West Virginia  |   |

# APPENDIX

# INDUSTRY SURVEY QUESTIONS

12. OPTIONAL - Contact Info - Your responses are processed by a trusted third party research firm and are completely confidential; this info is only used if further info is required. (we can move the contact person info to the first page if we're expecting it to be the same person for multiple gyms)

Your Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Gym Name: \_\_\_\_\_

Address 1: \_\_\_\_\_

Address 2: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

13. What year did this location open? (Please enter a 4-digit year)

\_\_\_\_\_

14. What was the gross revenue (total amount of sales prior to any deductions, for your first calendar year in business? (Please enter a number only, no "\$")

\_\_\_\_\_

15. What year did this location come under current ownership? (Please enter a 4-digit year)

\_\_\_\_\_

### 16. *Membership Numbers*

How many active members did you have on:

December 31, 2020: \_\_\_\_\_

December 31, 2021: \_\_\_\_\_

How many frozen members did you have on:

December 31, 2020: \_\_\_\_\_

December 31, 2021: \_\_\_\_\_

# APPENDIX

# INDUSTRY SURVEY QUESTIONS

17. What was your average member retention rate for 2021?

*Member Retention Rate = ((ME-MN)/MS) \* 100*

ME = Number of members at end of period

MN = Number of new members acquired during period

MS = Number of members at start of period

Average retention rate: \_\_\_\_\_

OR

I am unable to track/report retention

18. Please provide the number of check-ins for the 2021 calendar year:

Total number of check-ins: \_\_\_\_\_

Number of first time visitors (new waiver created): \_\_\_\_\_

19. What climbing offerings are available at this gym? Please check all that apply.

- Bouldering
- Top rope climbing
- Lead climbing
- Speed climbing
- Clip and Climb

20. How many auto-belay systems are installed at this gym?

\_\_\_\_\_

21. What climbing specific training equipment is available at this gym? Please check all that apply.

- Training board (Kilter, Moon, Tension)
- Campus board
- Hangboard
- Systems wall
- Treadwall
- Other
- None/NA

# APPENDIX

# INDUSTRY SURVEY QUESTIONS

22. What auxiliary offerings are available at this gym? Please check all that apply.

- |  |   |
|--|---|
| <input type="checkbox"/> Yoga                        | <input type="checkbox"/> Pilates          |
| <input type="checkbox"/> Spin/Cycling                | <input type="checkbox"/> Cafe             |
| <input type="checkbox"/> Aerial Skills               | <input type="checkbox"/> Restaurant       |
| <input type="checkbox"/> Weight room                 | <input type="checkbox"/> Bar              |
| <input type="checkbox"/> Treadmills/cardio equipment | <input type="checkbox"/> Martial Arts     |
| <input type="checkbox"/> Sauna                       | <input type="checkbox"/> Obstacle course  |
| <input type="checkbox"/> Kids-only climbing area     | <input type="checkbox"/> Childcare        |
| <input type="checkbox"/> Kids-only climbing times    | <input type="checkbox"/> Co-working space |
| <input type="checkbox"/> Adult-only climbing area    | <input type="checkbox"/> Other            |
| <input type="checkbox"/> Adult-only climbing times   | <input type="checkbox"/> None/NA          |

23. How many competitors do you have within your market area?

\_\_\_\_\_

24. Which of the following best describes the market saturation for what you define as this gym's market area?

- |  |   |
|--|---|
| <input type="checkbox"/> Extremely oversaturated | <input type="checkbox"/> Extremely undersaturated |
| <input type="checkbox"/> Oversaturated           | <input type="checkbox"/> Don't know               |
| <input type="checkbox"/> About right             | <input type="checkbox"/> Prefer not to answer     |
| <input type="checkbox"/> Undersaturated          |   |

## 25. Facility Size

Building footprint (as reported on your lease or tax report):

\_\_\_\_\_

Do you have any additional space (floors, outdoor, etc.) that increase usable square footage?

- Yes    No

26. What is that additional square footage?

\_\_\_\_\_

# APPENDIX

## INDUSTRY SURVEY QUESTIONS

27. Enter the number of anchors and routes per anchor for each of the following in this gym. Enter "0" in any fields that do not apply to this location.

	Number	Routes per Anchor
Top rope-only anchors		
Lead-only anchors		
Combined top rope and lead anchors		

28. Please provide the following information about the surface area and height of this gym's bouldering/rope climbing walls. Enter "0" in fields that do not apply to this location.

Square footage of bouldering surface: \_\_\_\_\_

Max. height of bouldering wall: \_\_\_\_\_

Square footage of climbable surface: \_\_\_\_\_

Max. height of rope climbing wall: \_\_\_\_\_

29. Please provide the following information about the surface area and height of this gym's bouldering/climbing walls. Enter "0" in fields that do not apply to this location.

How many boulder problems are set in this gym? \_\_\_\_\_

How many linear feet is your bouldering base of wall?: \_\_\_\_\_

30. Please enter **gross revenue** (total amount of sales prior to any deductions) for 2021 for this gym location in the following categories. Enter "0" in fields that do not apply to this location.

Memberships: \_\_\_\_\_

Day/punch passes: \_\_\_\_\_

Adult climbing program/class revenue: \_\_\_\_\_

Youth climbing program/class revenue: \_\_\_\_\_

Outdoor program revenue (guiding, classes, etc.): \_\_\_\_\_

Group sales (corporate, schools, birthday parties, scouts, etc.): \_\_\_\_\_

Non-climbing program/class revenue (yoga, fitness, etc.): \_\_\_\_\_

Gear rental revenue: \_\_\_\_\_

Retail revenue: \_\_\_\_\_

Food & Beverage: \_\_\_\_\_

Other revenue not included above: \_\_\_\_\_

Total gross annual revenue minus sales tax: \_\_\_\_\_

# APPENDIX

# INDUSTRY SURVEY QUESTIONS

31. What is the projected percent increase/decrease in gross annual revenue (minus sales tax) for this gym location in 2022?

0 \_\_\_\_\_ [ \_\_\_\_\_ ] \_\_\_\_\_ 100

32. Please enter the 2021 outlay for the following *expense* categories for this gym:

Lease/mortgage payment: \_\_\_\_\_

Debt service: \_\_\_\_\_

Utilities: \_\_\_\_\_

Hold/volumes purchase: \_\_\_\_\_

Non-climbing/value added improvements (fitness equip, front desk computers, yoga room flooring, bar on wall, etc.): \_\_\_\_\_

Cleaning/custodial/janitorial: \_\_\_\_\_

Maintenance and Repair: \_\_\_\_\_

Marketing/promotions: \_\_\_\_\_

Insurance: \_\_\_\_\_

Federal taxes: \_\_\_\_\_

Credit card processing fees: \_\_\_\_\_

Professional services (bookkeeping, attorney, etc.): \_\_\_\_\_

Total payroll (incl. payroll taxes, workers comp, and other employee benefits): \_\_\_\_\_

Retail stock: \_\_\_\_\_

Climbing related consumables (ropes, shoes, harnesses, pads, etc.): \_\_\_\_\_

Other; please describe: \_\_\_\_\_

# APPENDIX

## INDUSTRY SURVEY QUESTIONS

33. Please enter the amount spent in 2021 on the following *payroll expenses* including independent contractors for this gym location (number only and round to nearest dollar; no \$ or decimals necessary, enter "0" in fields that do not apply to this location.)

	Enter Amount	Average Tenure in Years <i>(round to the nearest whole year)</i>
Owner Payroll		
Non-owner management		
Front desk staff		
Instructional staff - climbing		
Instructional staff – other programs (fitness, etc.)		
Routesetters		
Administrative staff		
Staff training		
Other - please describe		

34. Please enter the price of the following products for this gym location (number only; no \$ or decimals please; enter "0" in fields that do not apply to this location.)

	Day Pass	10-punch pass	Monthly EFT	Monthly prepaid	Annual prepaid
Single					
Family					
Dual					
Child					
Teen					
Student					
Military					
Other - please describe					



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