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*What makes some centres so much more efficient than others?*

*Mike Hill – Leisure-net*

*Lisa Forsyth – Max Associates*

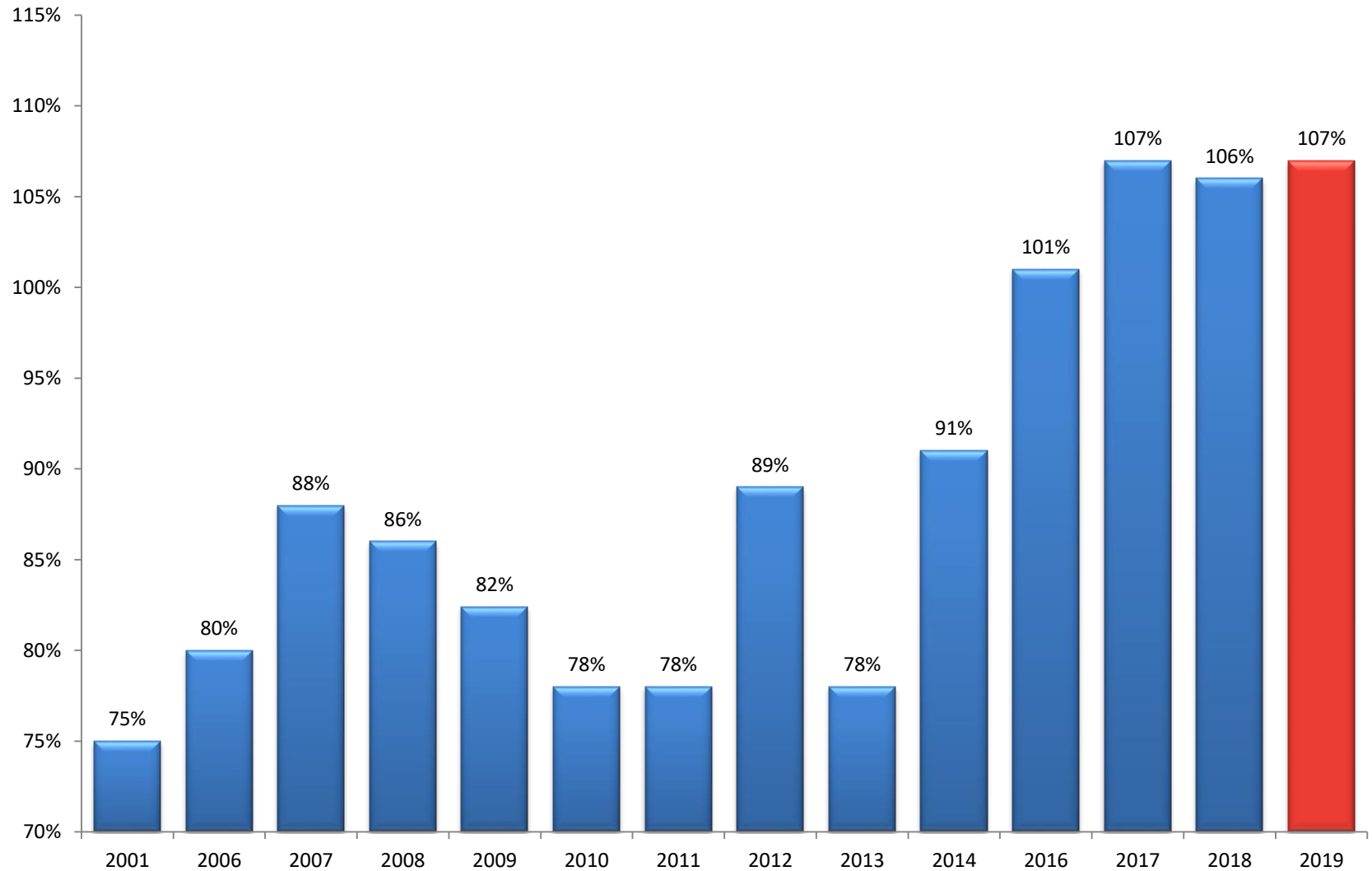


## Industry Relevance

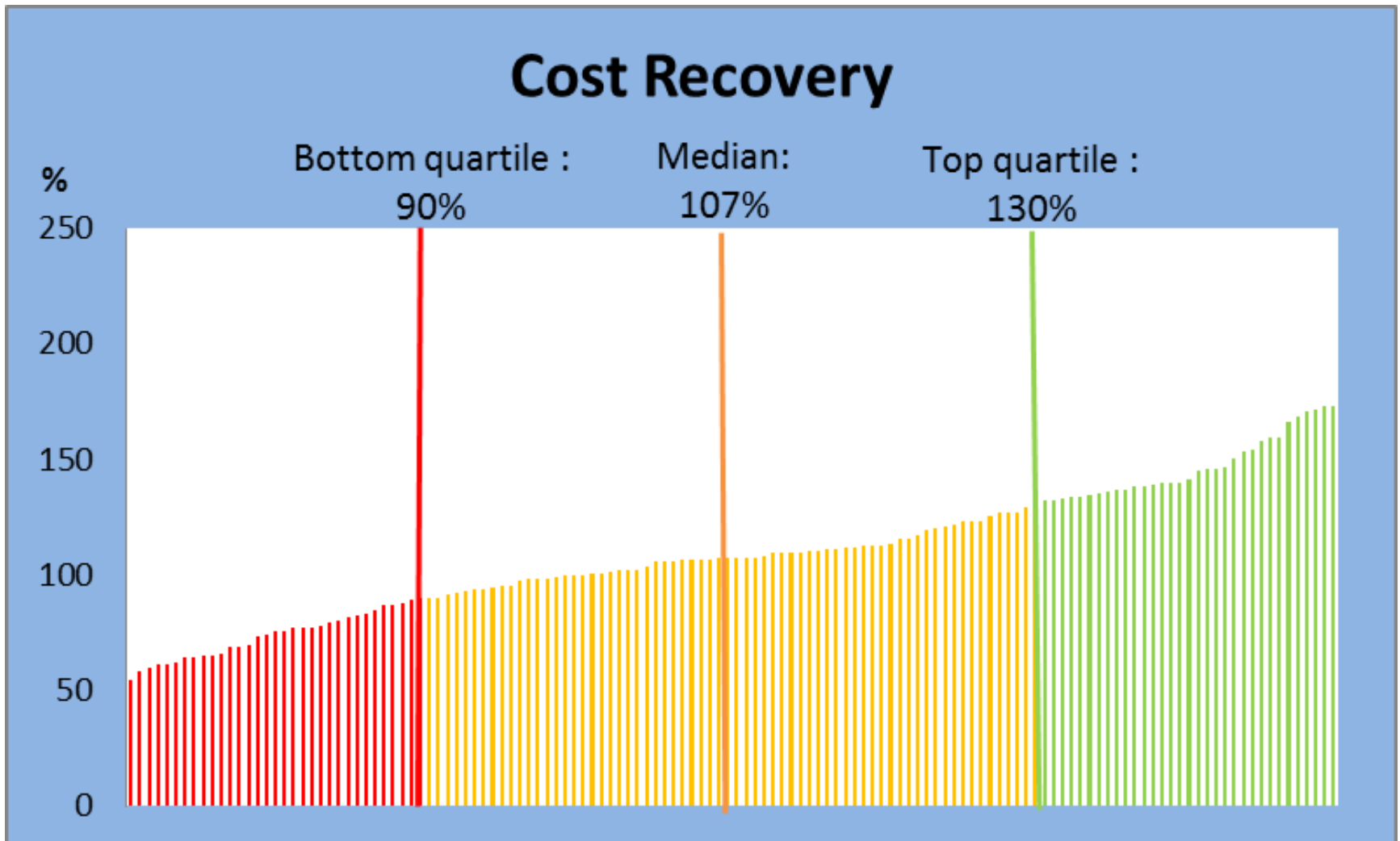
*The NBS 2019 Sample for efficiency*

	2019	2018	Change	% Change
Total number of centres	145	257	-112	-44%
Full NBS reports	43	70	-27	-39%
Efficiency	102	187	-85	-45%
Surveys	13,915	23,583	-9,668	-41%

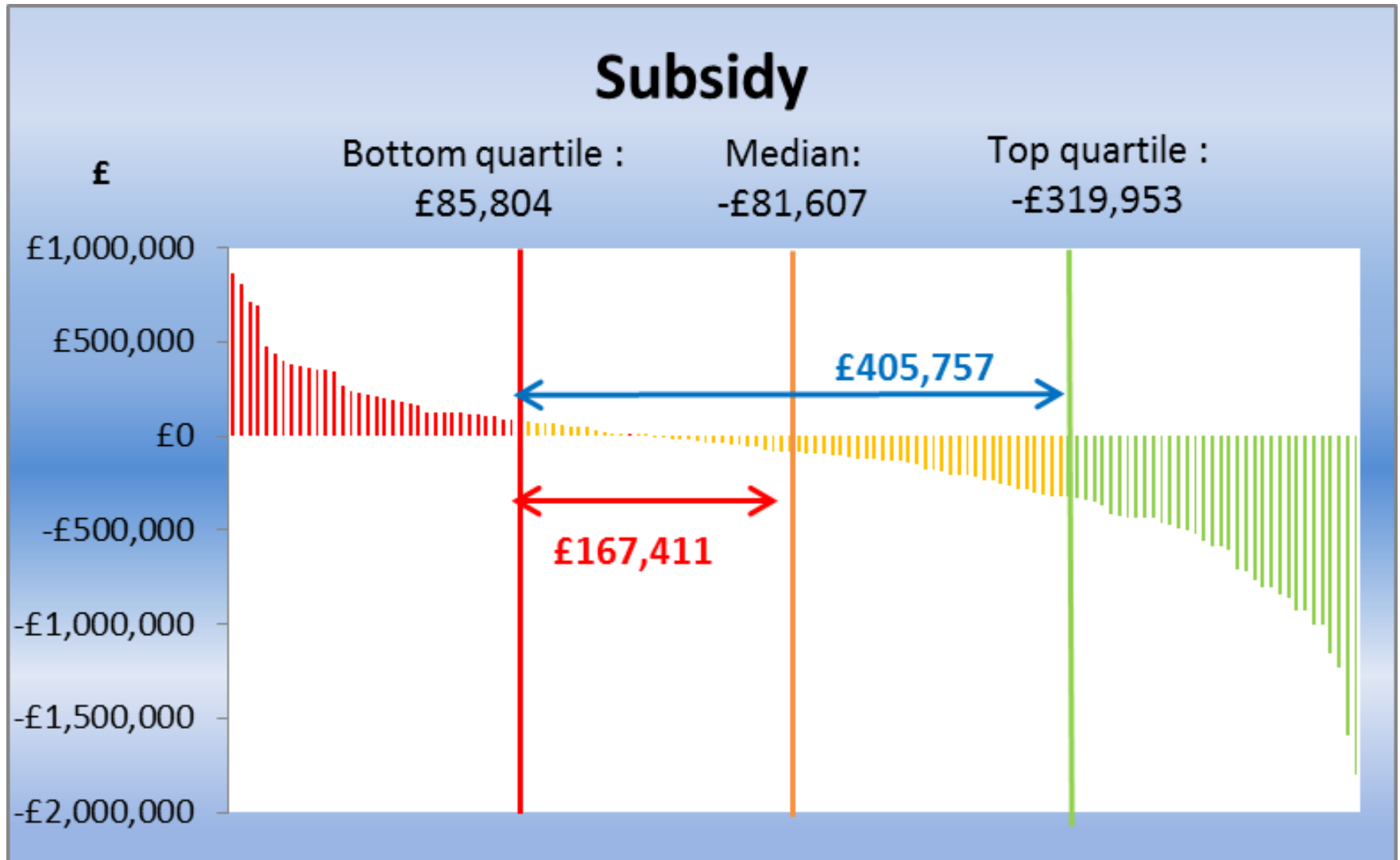
## Highlight 1: Cost Recovery % (a)



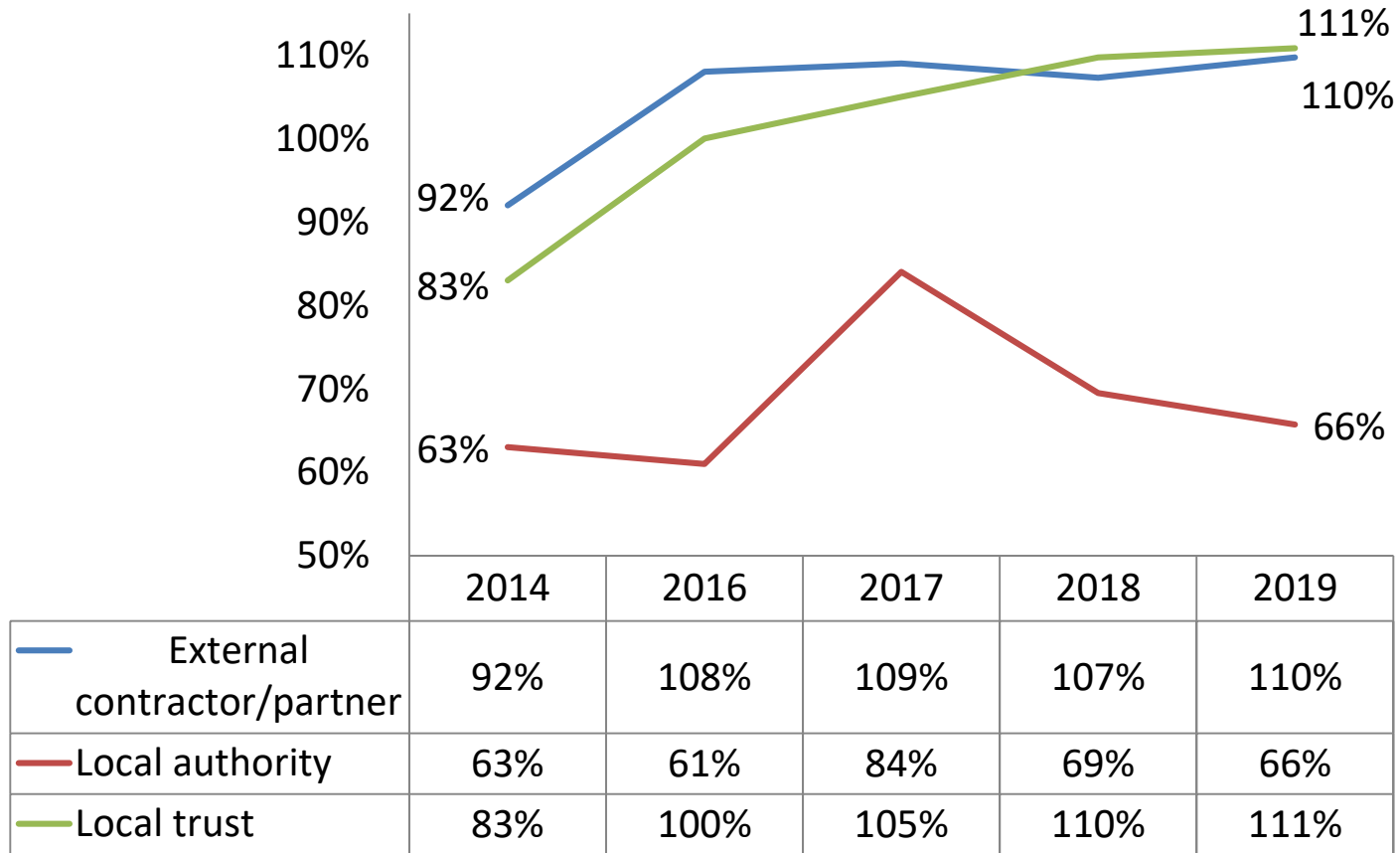
## Highlight 1: Cost Recovery % (b)



## Variations in Subsidy by Facility

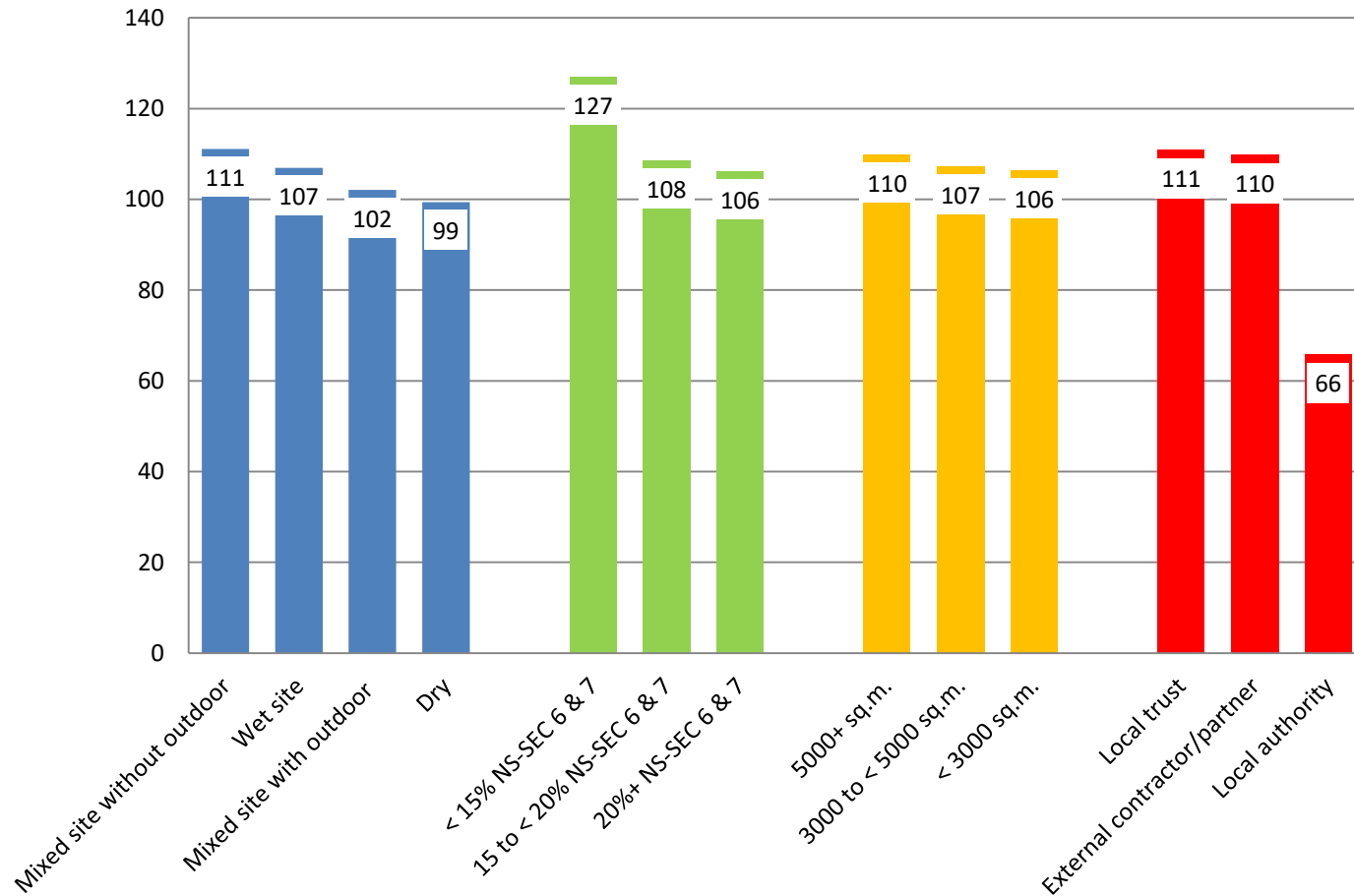


# Cost Recovery by Management Type



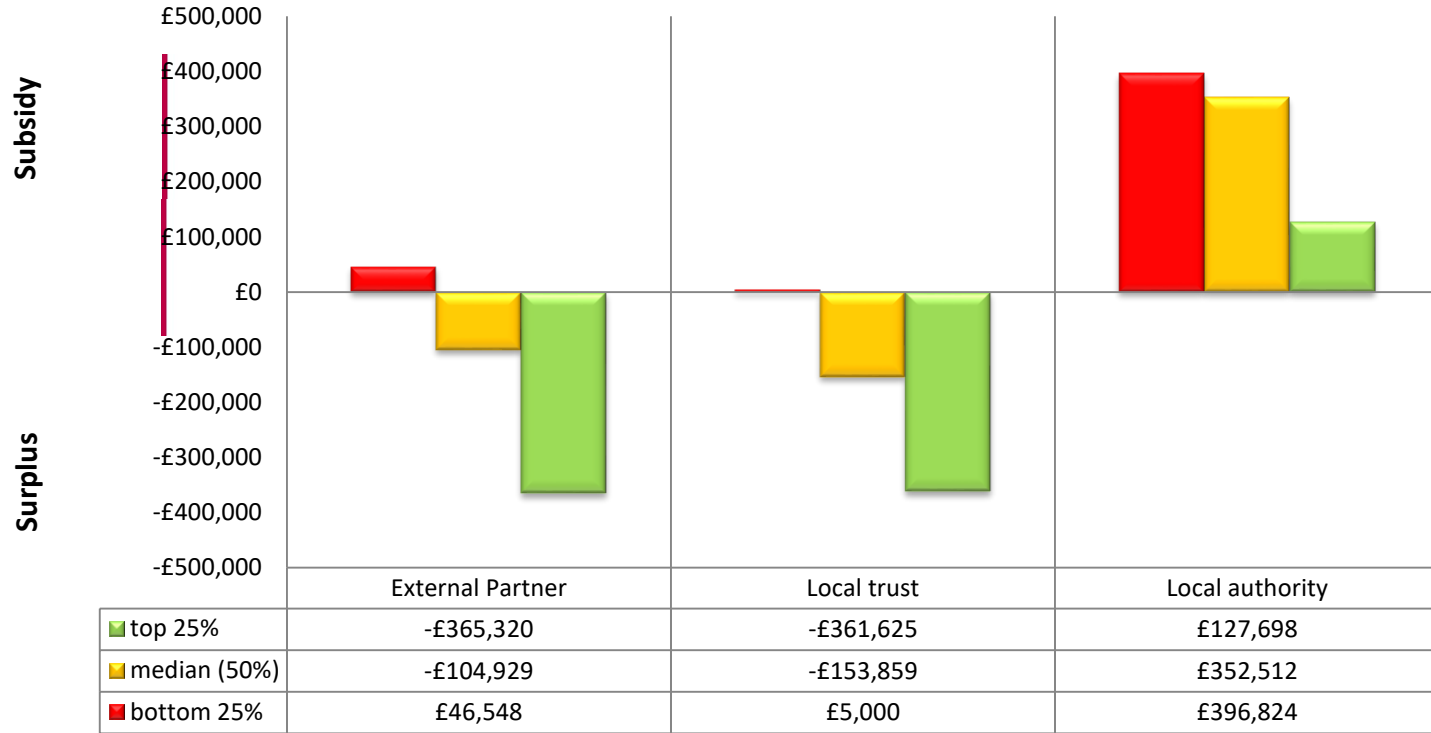
— External contractor/partner    — Local authority    — Local trust

### % Cost recovery by families





**Subsidy by management types**



	% cost recovery				
	Mean				
1	173	Dry site	<15% of catchment NS-SEC 6&7	1500 - <3000 sq.m floor space	External partner/contractor
2	172.9	Wet site	<15% of catchment NS-SEC 6&7	3000 - <5000 sq.m. floor space	External partner/contractor
3	171.6	Wet site	20%+ catchment in NS-SEC 6&7	1500 - <3000 sq.m floor space	Local Trust
4	171	Dry Site	20%+ catchment in NS-SEC 6&7	5000+ sq.m. floor space	Local Trust
5	168.8	Mixed with outdoor	20%+ catchment in NS-SEC 6&7	3000 - <5000 sq.m. floor space	External partner/contractor
6	166.7	Mixed with outdoor	15 - <20% of catchment in NS-SEC 6&7	5000+ sq.m. floor space	External partner/contractor
7	159.5	Mixed without outdoor	20%+ catchment in NS-SEC 6&7	5000+ sq.m. floor space	External partner/contractor
8	159.2	Mixed without outdoor	15 - <20% of catchment in NS-SEC 6&7	3000 - <5000 sq.m. floor space	External partner/contractor
9	158.2	wet site	20%+ catchment in NS-SEC 6&7	1500 - <3000 sq.m floor space	External partner/contractor
10	154	Mixed with outdoor	20%+ catchment in NS-SEC 6&7	5000+ sq.m. floor space	External partner/contractor

*Cost recovery bottom ten*



1	54.37	Dry site	20%+ catchment in NS-SEC 6&7	<1500 sq.m. floor space	External partner/contractor
2	58.07	Mixed without	20%+ catchment in NS-SEC 6&7	3000 - <5000 sq.m. floor space	External partner/contractor
3	59.94	Mixed with outdoor	20%+ catchment in NS-SEC 6&7	3000 - <5000 sq.m. floor space	In house local authority
4	61.05	Mixed with outdoor	20%+ catchment in NS-SEC 6&7	1500 - <3000 sq.m floor space	In house local authority
5	61.56	Dry site	20%+ catchment in NS-SEC 6&7	<1500 sq.m. floor space	In house local authority
6	62.47	Mixed with outdoor	15 - <20% of catchment in NS-SEC 6&7	1500 - <3000 sq.m floor space	In house local authority
7	64.24	wet	20%+ catchment in NS-SEC 6&7	1500 - <3000 sq.m floor space	In house local authority
8	64.32	Mixed with outdoor	20%+ catchment in NS-SEC 6&7	5000+ sq.m. floor space	External partner/contractor
9	65.25	Mixed without outdoor	20%+ catchment in NS-SEC 6&7	1500 - <3000 sq.m floor space	In house local authority
10	65.44	Mixed without outdoor	20%+ catchment in NS-SEC 6&7	1500 - <3000 sq.m floor space	In house local authority

## Family groupings of top and bottom ten performing sites

	Facility mix	SEC 6 and 7	Size	Mgt type
Top ten	3 are mixed with outdoor, 3 are wet sites	6 are 20%+ NS-SEC 6 and 7	4 are very large, 3 are large	8 are External Partners/contractors 2 different local Trusts
Bottom ten	4 are mixed with outdoor	9 are 20+ NS-SEC 6 and 7	5 are medium sized	7 are inhouse local authority 3 External Partners/contractors

## Age and refurbishment characteristics of top and bottom ten

- We looked at the age and refurbishment history of the top and bottom ten performing sites – efficiency wise
- There was no discernible pattern of older v newer/refurbered sites

## Key Takeaways

- Little difference between local trusts and ‘external partners/contractors’ i.e. the economies of scale of a larger organization, or more specialist skills are not impacting individual centres’ performance as much as it used too or we would expect it to
- And we must bear in mind that Customer Experience measures show that Local Authorities outperform both Trust and External Partners

	External	Trust	In-House
Overall Satisfaction /5	4.29	4.59	<b>4.61</b>
Net Promoter Score	23%	<b>62%</b>	53%

## Key takeaways (continued)

- The age/size/demographics/facility mix are not such a pre-determinator as you might think in terms of being a top performer in Cost recovery and Efficiency generally
- However Management type is definitely a factor, although this could be about the sites that have been “outsourced” management wise and those that are have not?
- Culture and freedom - Less flexibility e.g. websites and on-line booking systems
- Invest to save option
- However governance factors such as VAT/NNDR and staffing costs (pension/job review) have significant impact

Questions, comments, challenges?





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