



STATE OF THE INDUSTRY

Benchmarking Aquatic Facility Study

Edition 1, 2017

Platinum



Australian Innovative Systems

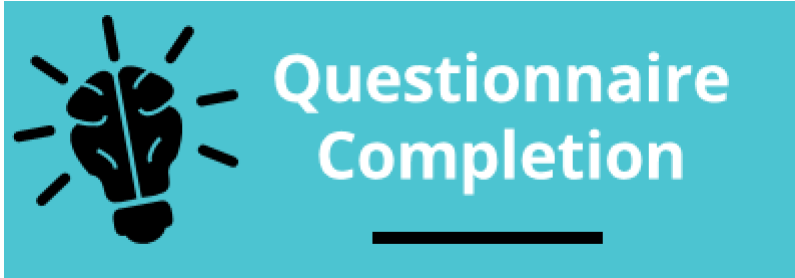
Gold



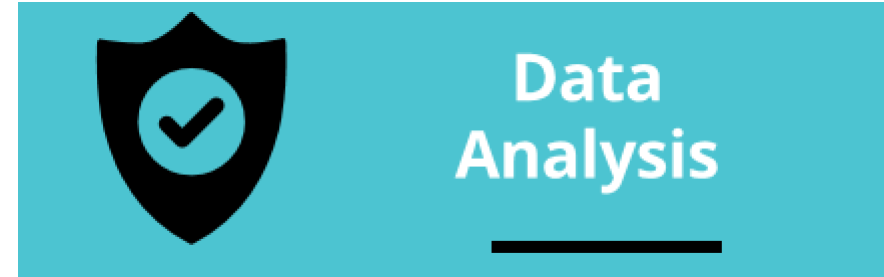
Silver



The How.....



- 95 questions developed by ALFAQ board
- Across a broad spectrum of pool topics
- Aquatic Facility Managers of Qld
- Survey Monkey link
- Voluntary to complete survey
- Voluntary questions
- Sufficient responses were made to enable statistical validity
- No checking of answer validity was undertaken



- Graphs direct from Survey Monkey
- Q86, graph created from raw data

The How.....



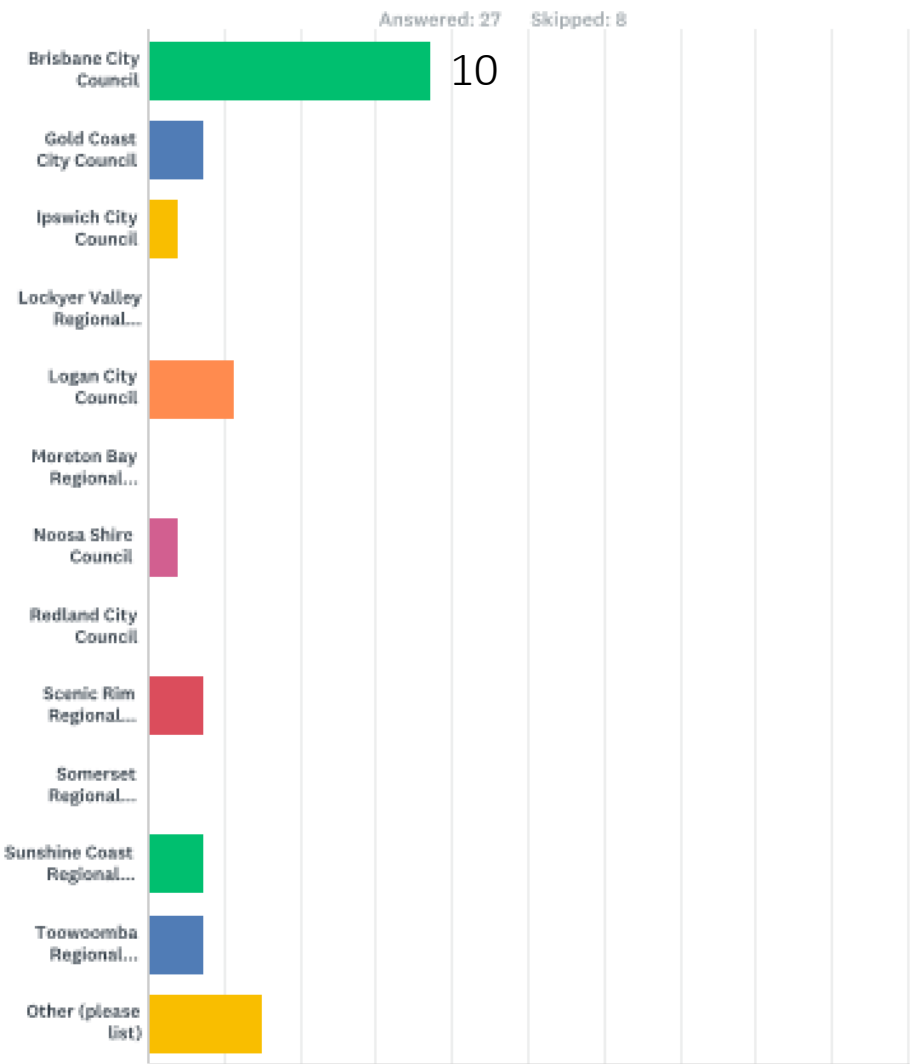
- 35 of the 95 questions are shown
- Questions to show were selected by ALFAQ board
- Questions shown - highlight key industry differences – so we can ask why?
- eg. 100% have shade cloth so this is not shown



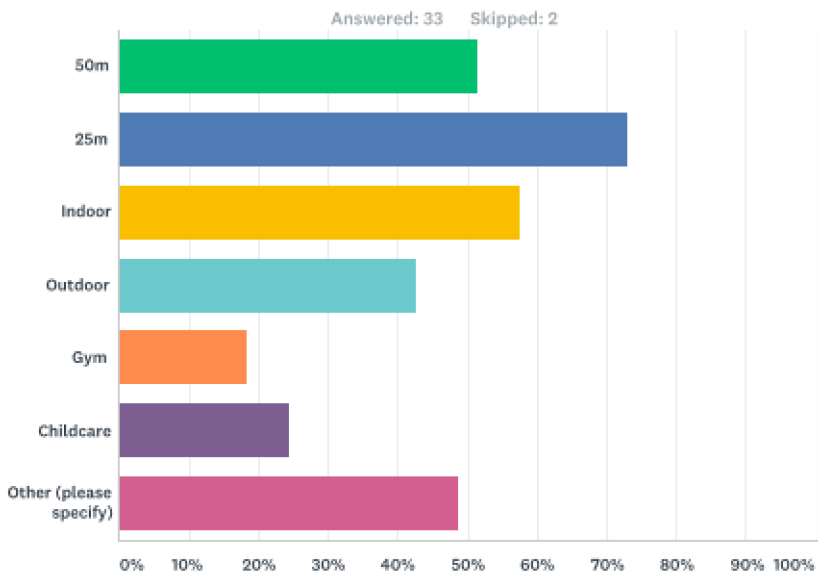
- No interpretation was made in the study on what answer is “the best”
- The session today has some interpretations
- Largely interpreting what is best is obvious from the data. Eg. 100% compliance to GSPO is better than 80%
- There has been no cross-interpretation, eg did immersions happen at non-100% GSPO pools

Centre overview...

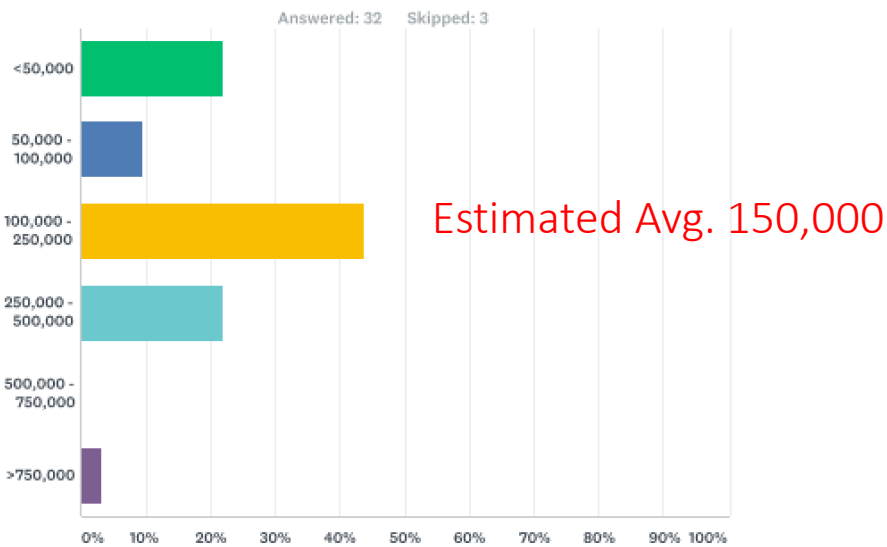
Q89 Council that the pool operates within:



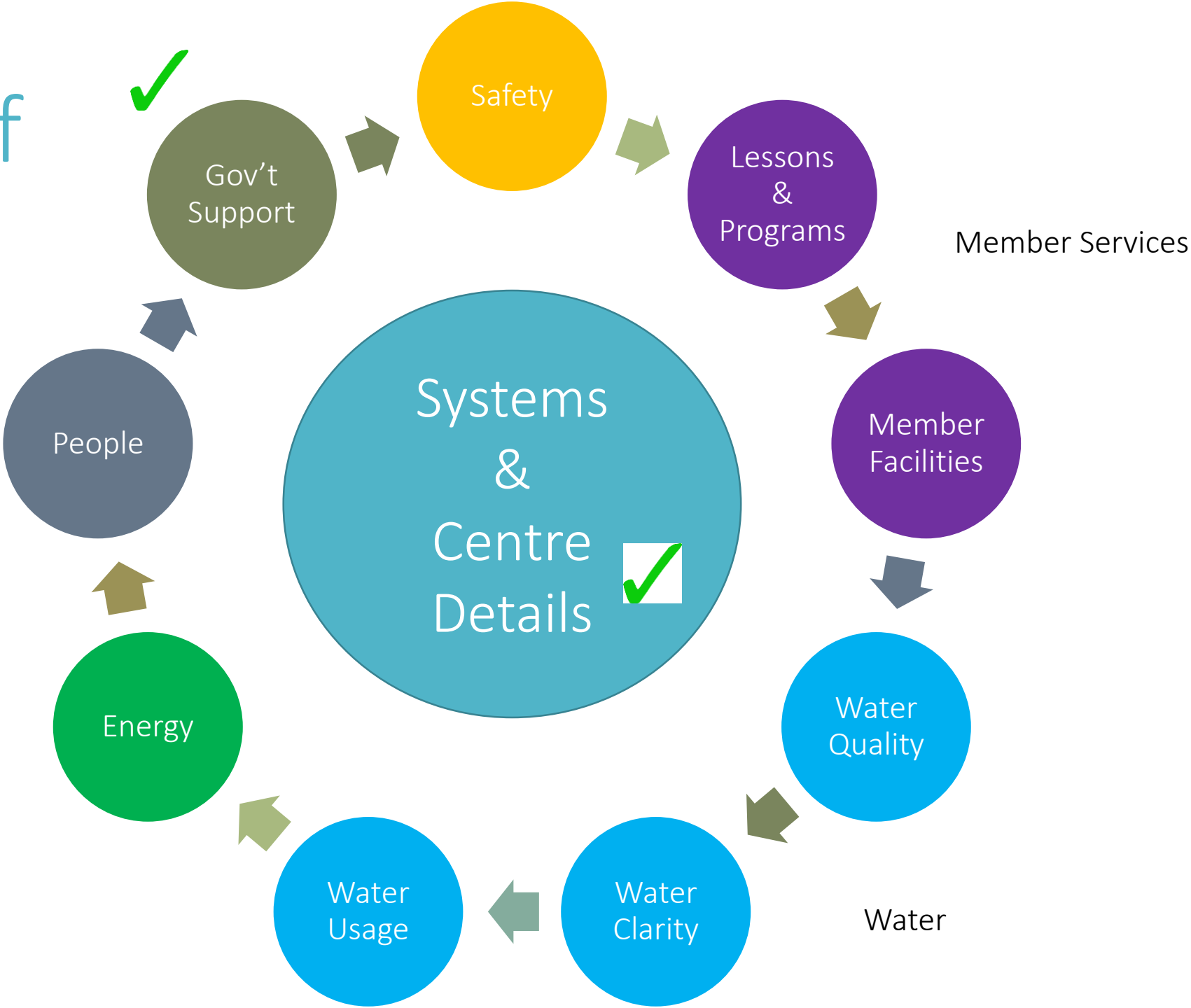
Q15 What type of pools do you have in your complex?



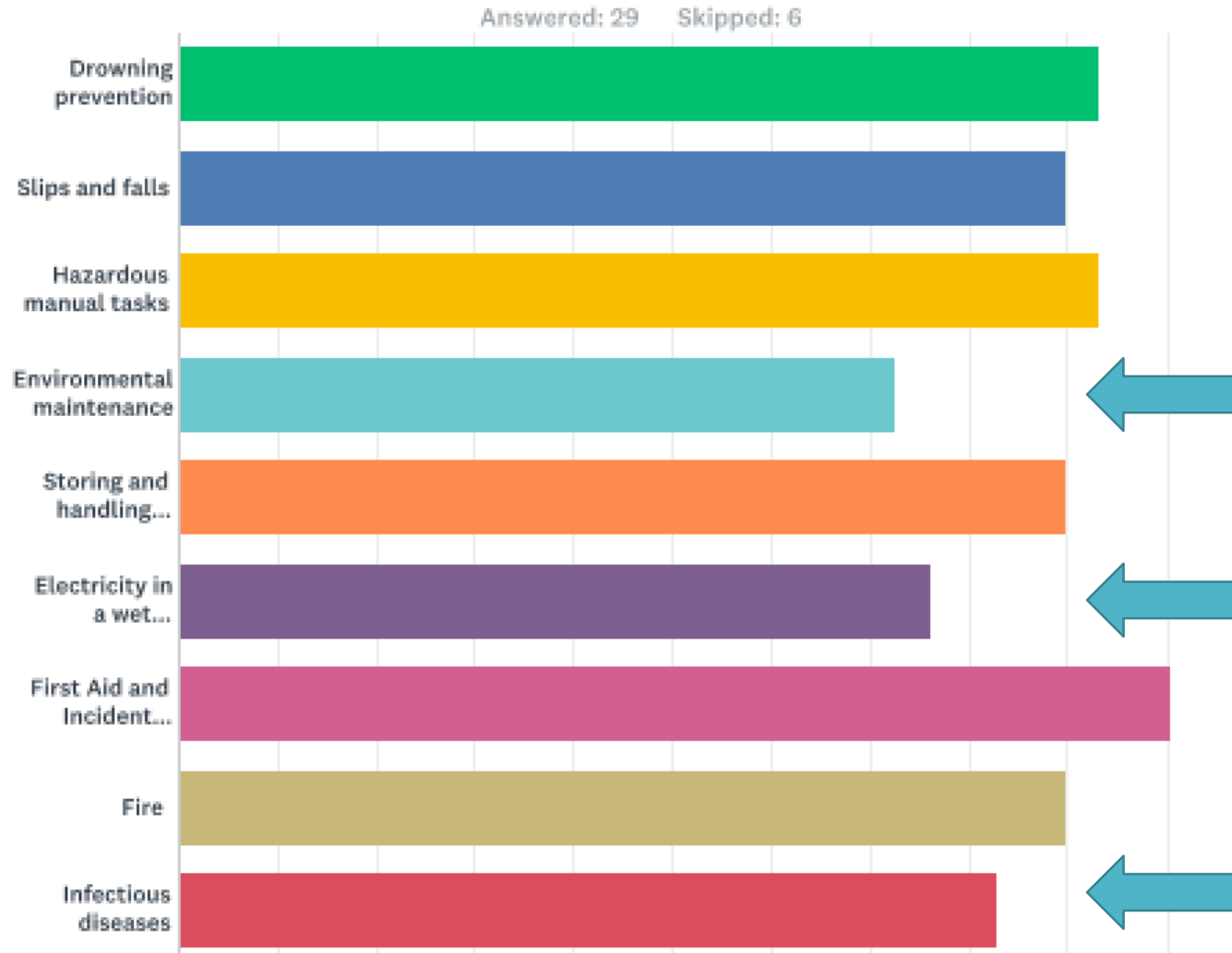
Q19 How many people per year would come through your centre?



The Areas of Analysis

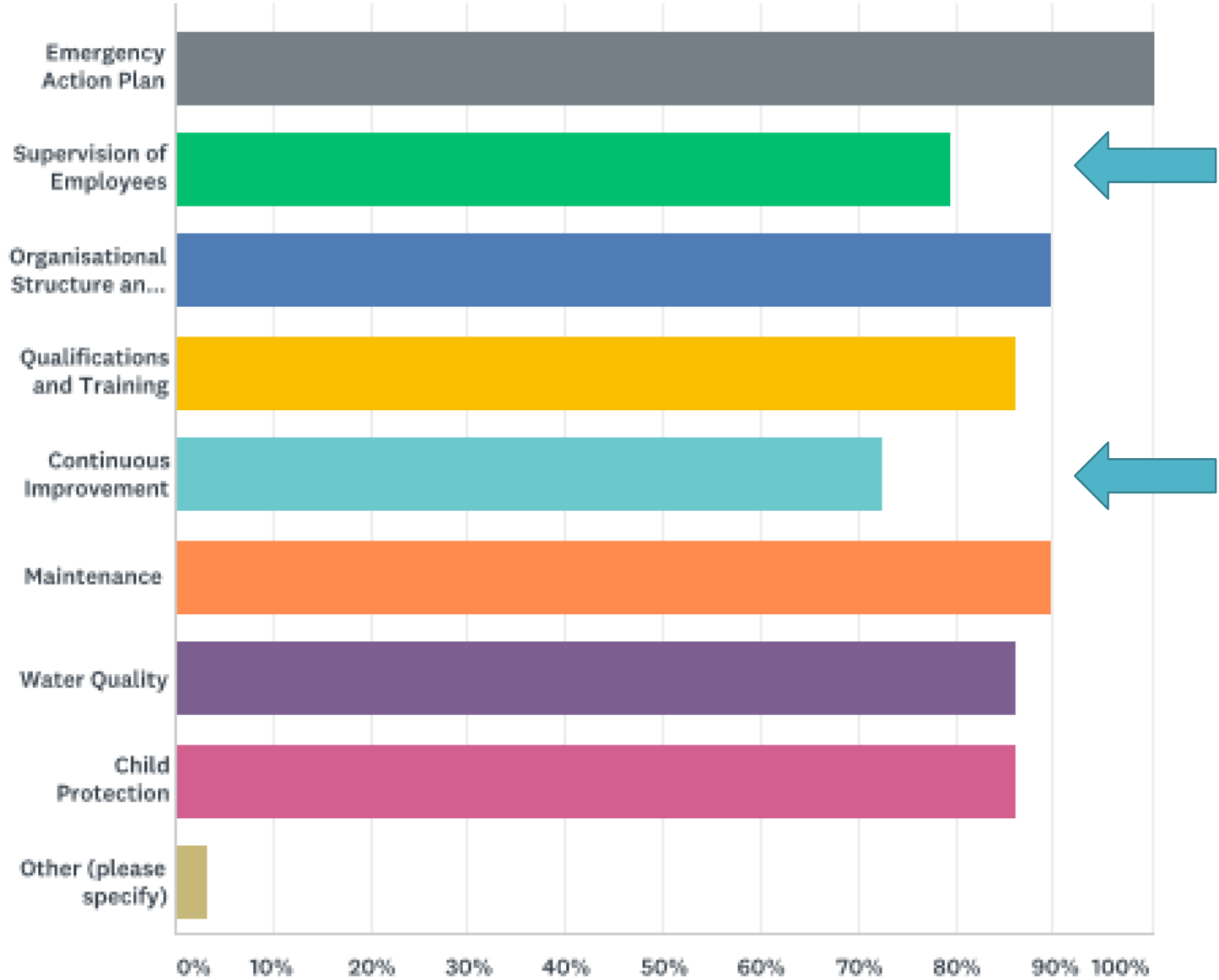


Q85 Do you have Safety Systems (e.g. risk assessments/procedures/policies) in place for any/all of the following?



Does your centre have these?

Systems contd.

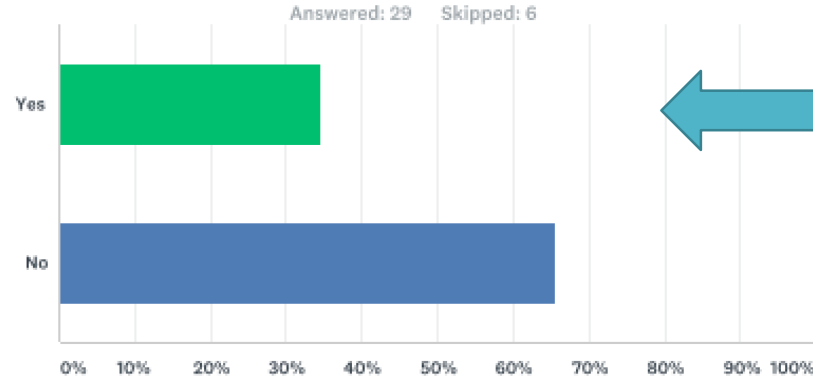


Does your centre have these?

Safety

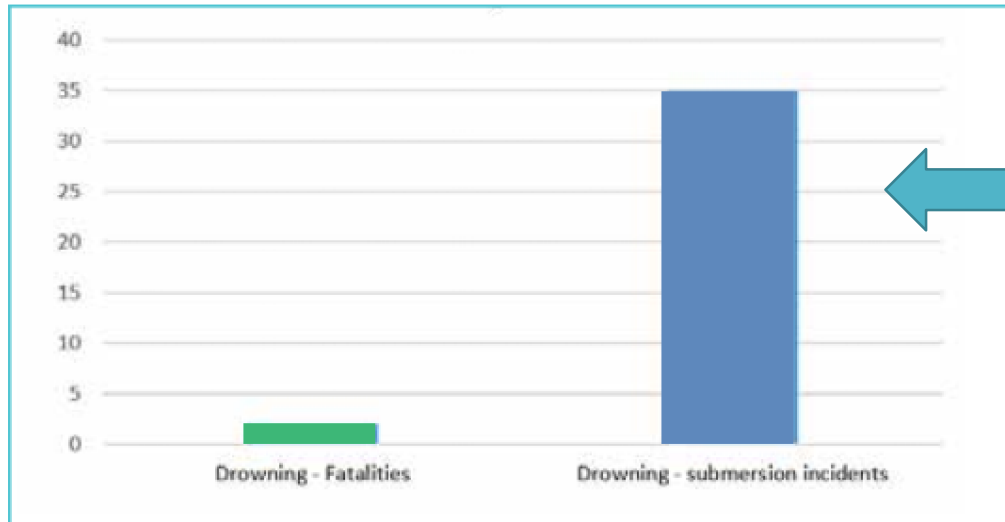
Safety

Q88 In the last 5 years, have you ever had an investigation into your facility by WHS?



Large % have been investigated

**In 2016, how many of the following have you had?
Please enter the number of incidents in the space
provided.**

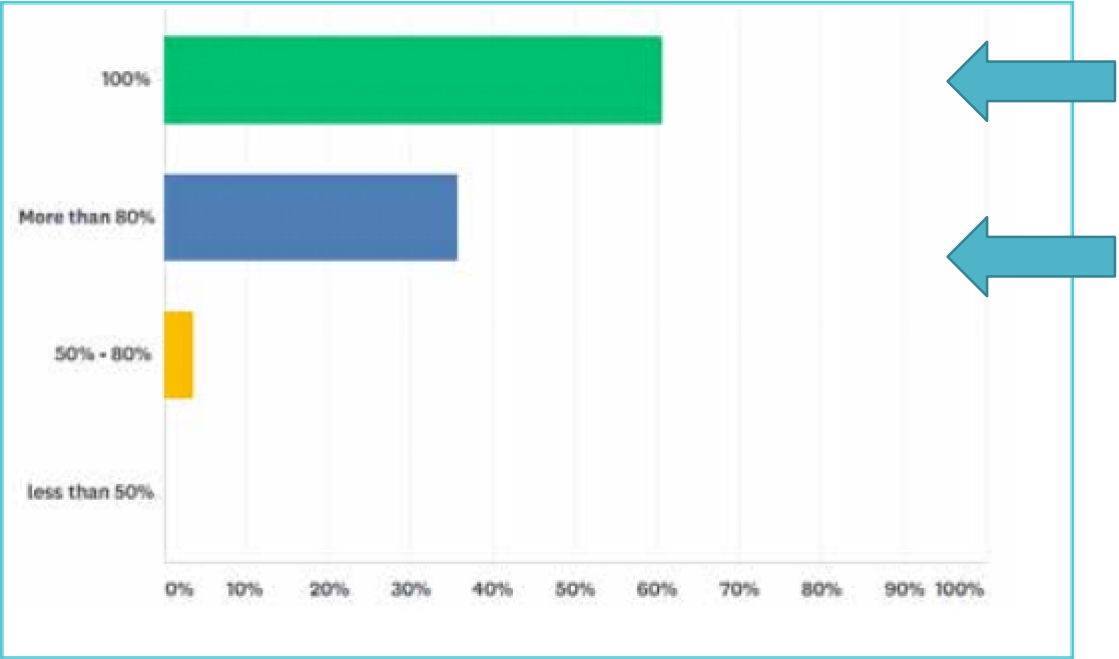


Just over an immersion for every pool on average:

- Not all pools had immersions,
- Some had multiple

Safety

Do you follow the GSPO (note GSPO are guidelines not laws)?

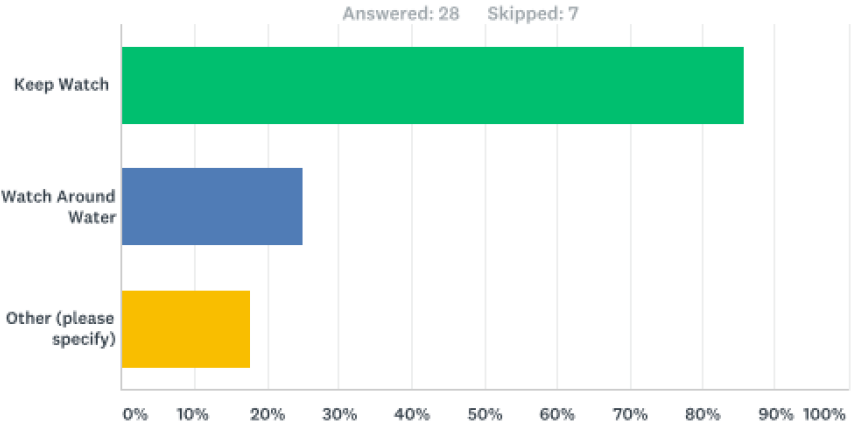


Around 60% completely follow GSPO

Vast majority follow it >80%

ALFAQ Member Benchmarking Survey

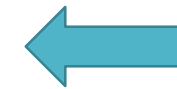
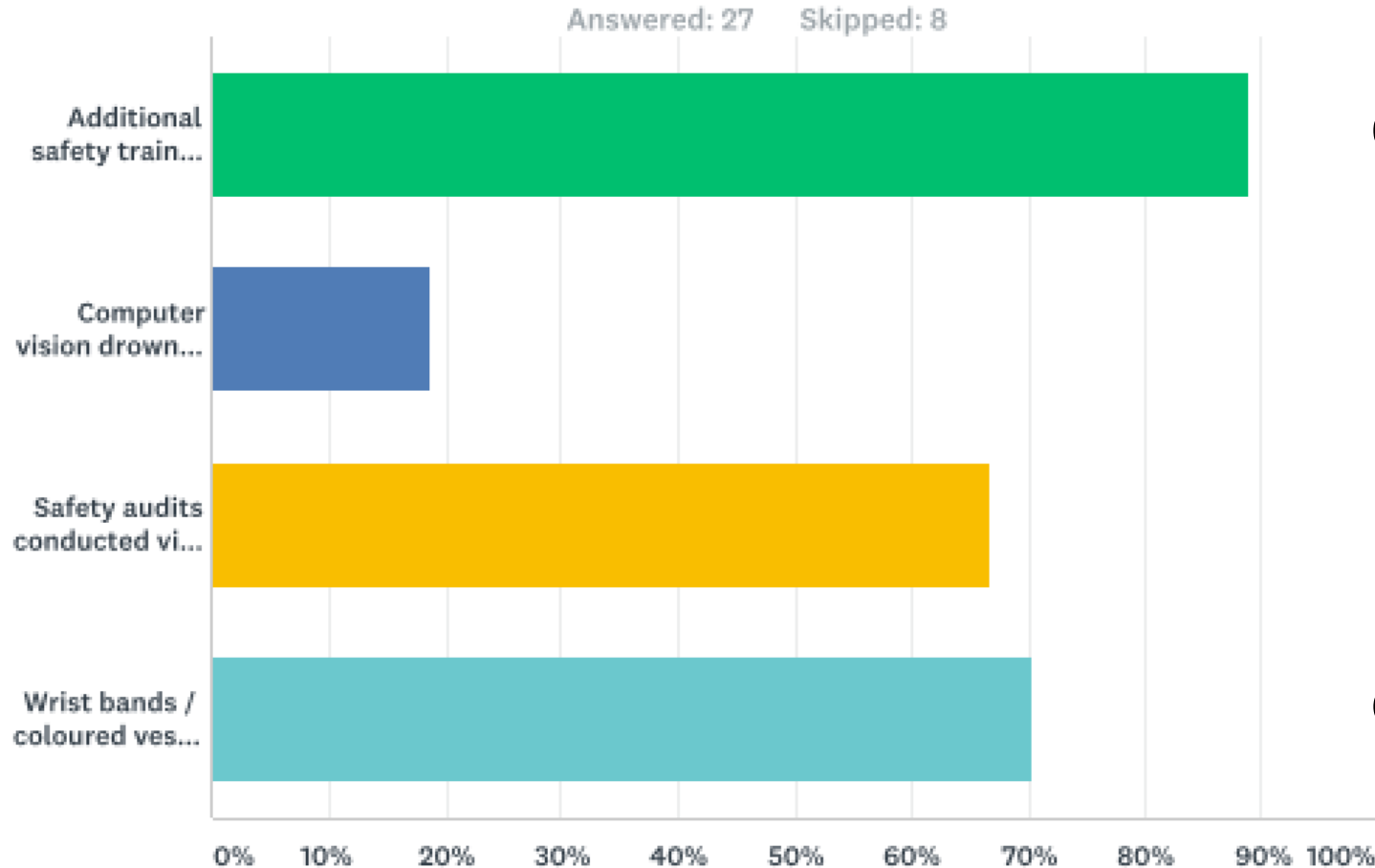
Q80 If yes, what program is in place?



Strong take up of supervision programs

Q87 In the last year, have you ever considered?

Safety



A large proportion of centres are looking for what else can be done

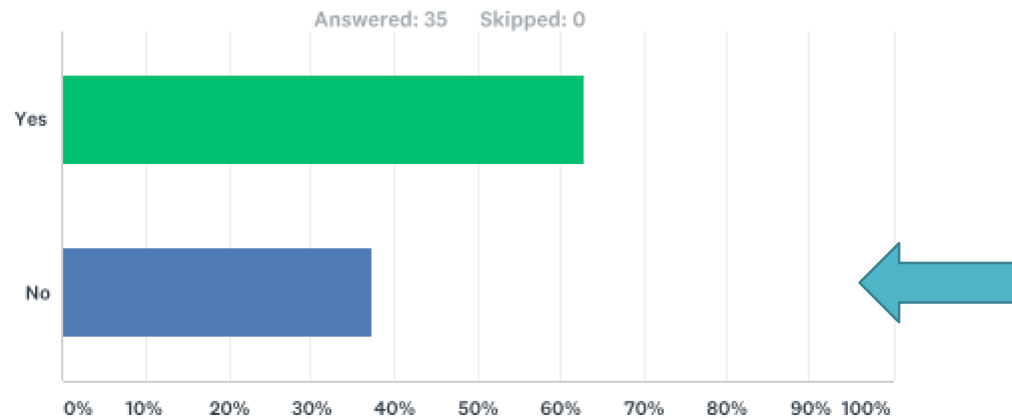
ANALYSIS

Incidents are still occurring despite majority following industry guidelines
As such new initiatives are being investigated

Member Services

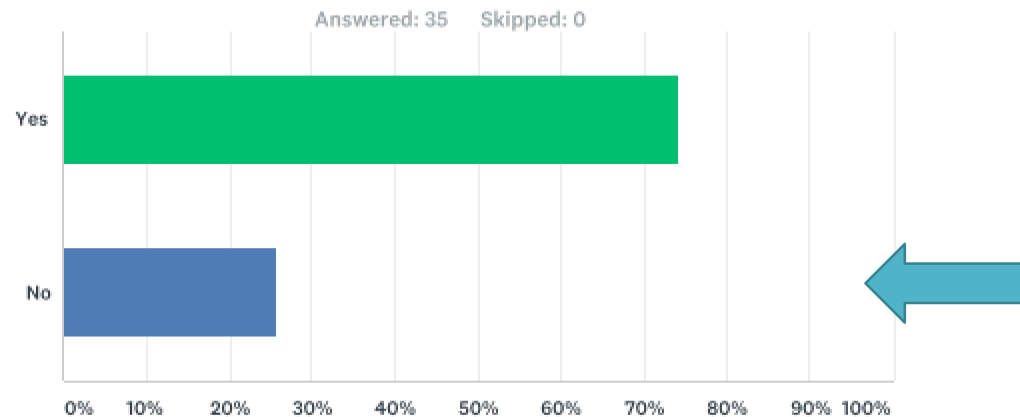
Lessons, Programs & Facilities

Q1 Do you include specific lessons for disabled patrons?



Opportunity to support
Disabled Community

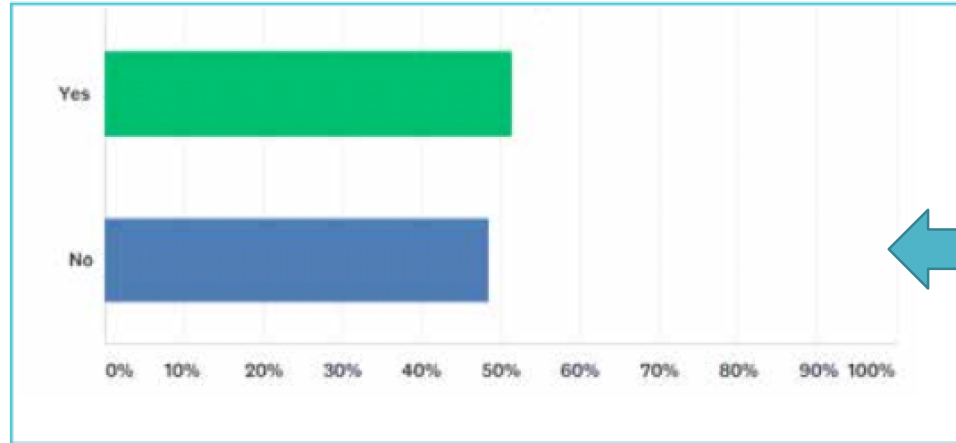
Q2 Do you have classes for babies under 6 months



Opportunity for baby
programs

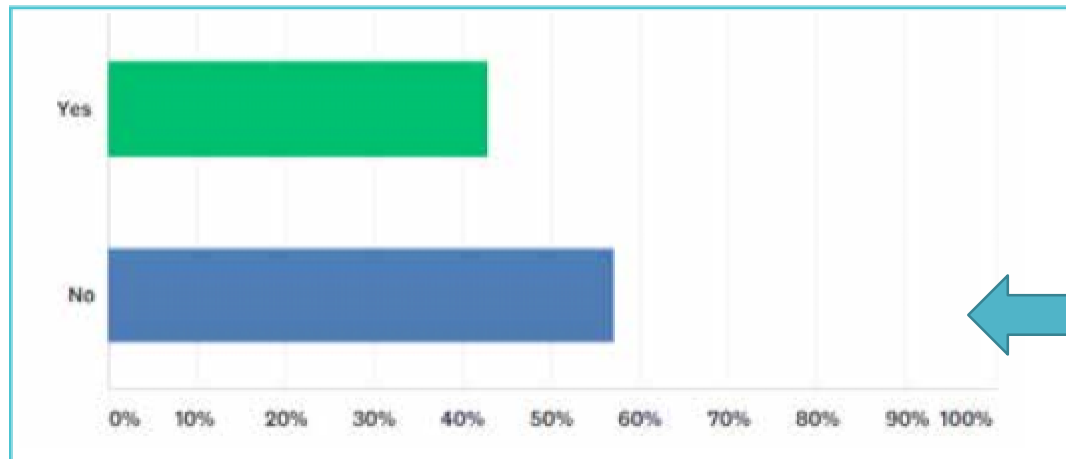
Lessons, Programs & Facilities

Do you run a program like the Swim 2 Survive or Optus Junior Dolphins for your school based programs?



Opportunity for School programs
Nb. Non branded programs?

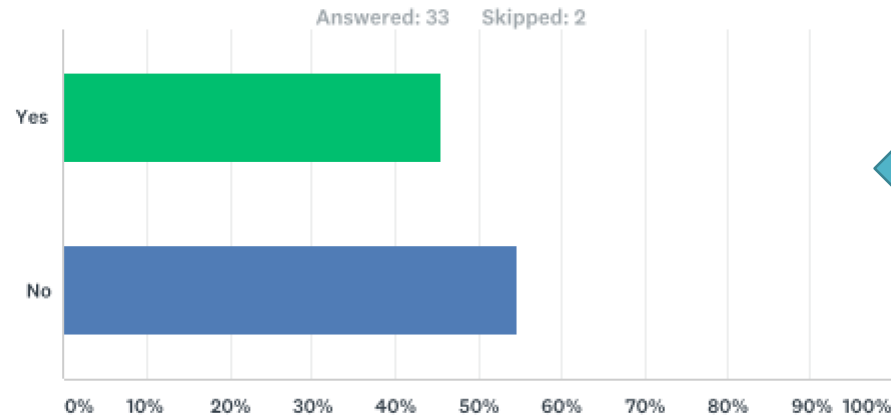
Do you have a program specifically targeting elderly people?



Ageing Demographic
opportunity

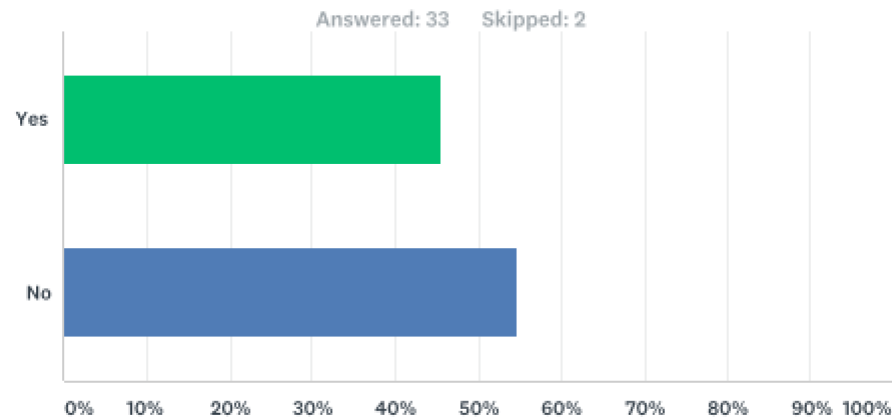
Lessons, Programs & Facilities

Q28 Does your facility provide Hydro-therapy facilities?



Opportunity for Hydro therapy

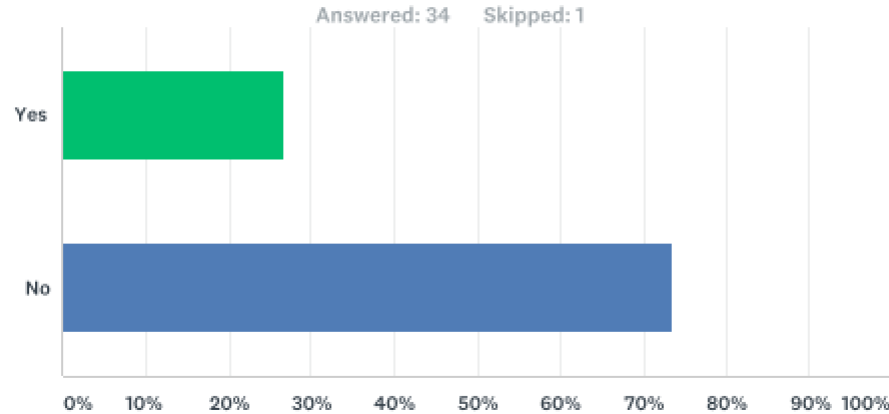
Q29 Does your facility have health club / gym facilities?



Gym opportunities

Lessons, Programs & Facilities

Q8 Do you offer public training for CPR, First Aid?



← Opportunity for public training

ANALYSIS

Overall, there are gaps in the “non-standard” programs area:

- Disabled
- Elderly
- Babies
- Patron safety lessons

← Better Community Service
Better \$ incomes

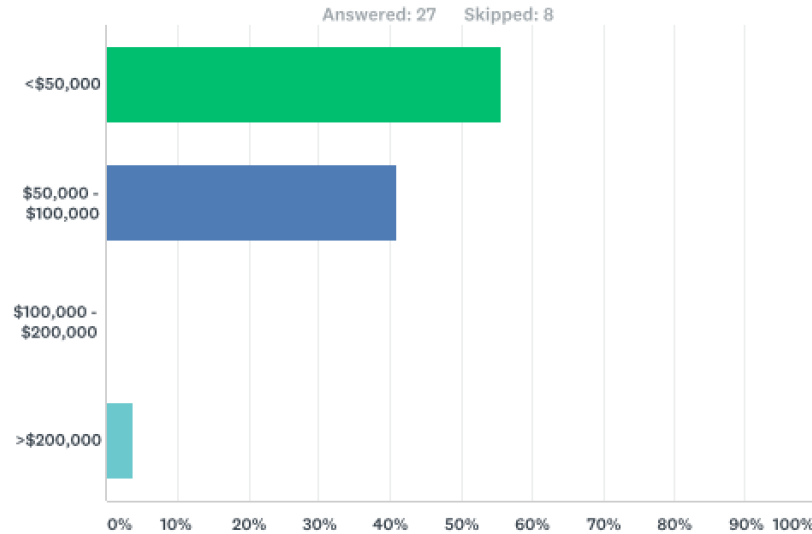
And gaps in Add-on services:

- Hydrotherapy
- Gyms

Water

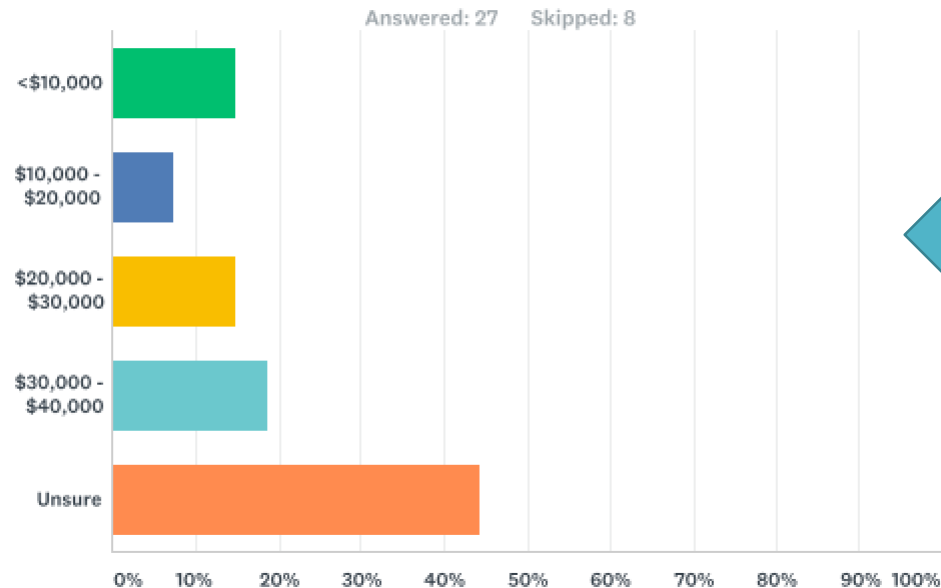
Water Spend

Q51 How much would you spend per year on chemicals?



Large \$ per year on chemicals

Q64 How much does the centre spend on water per year?

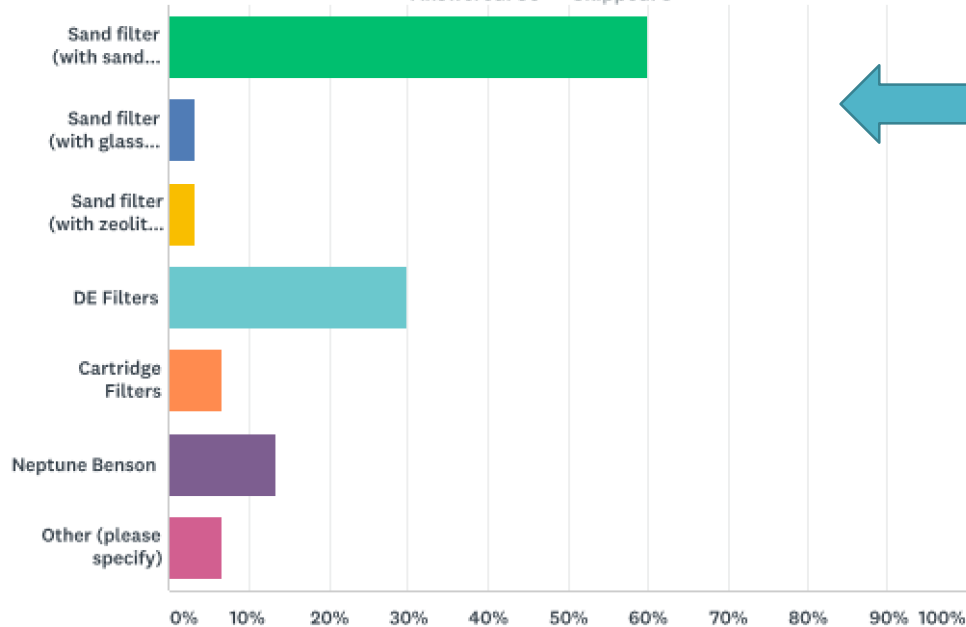


Large \$ per year on water

Approx \$75K p.a on water & chemicals

Q42 What type of filtration is on site?

Answered: 30 Skipped: 5



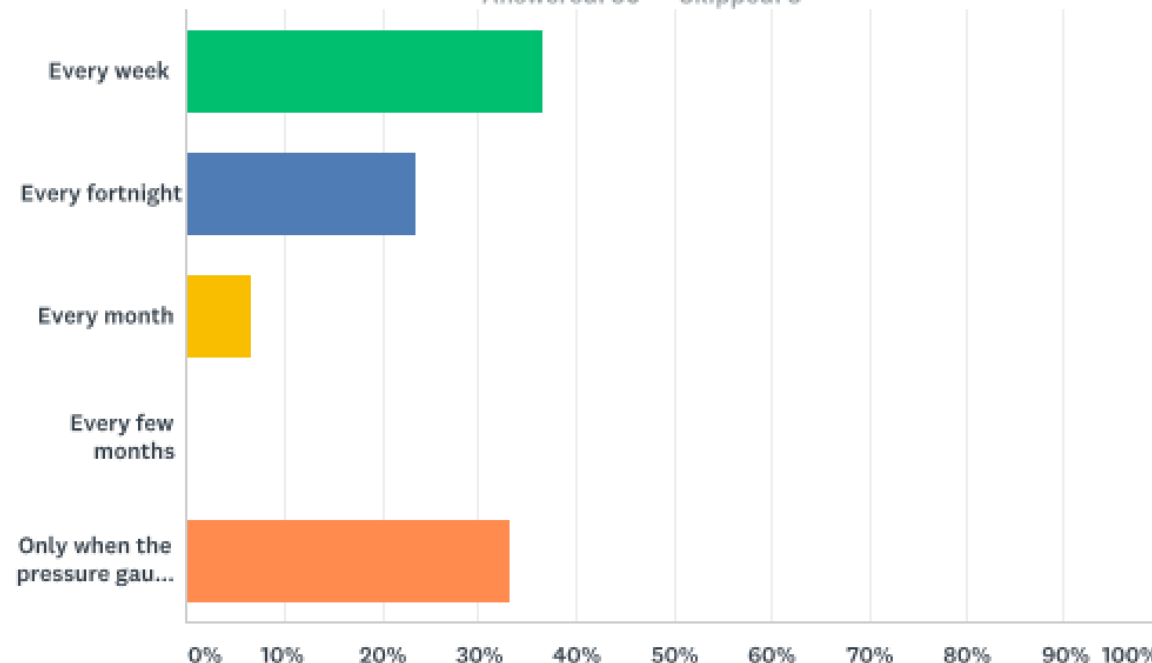
Large proportion of Sand Filters have not moved to more efficient Glass Media

Wasting Water by backwashing on time not pressure

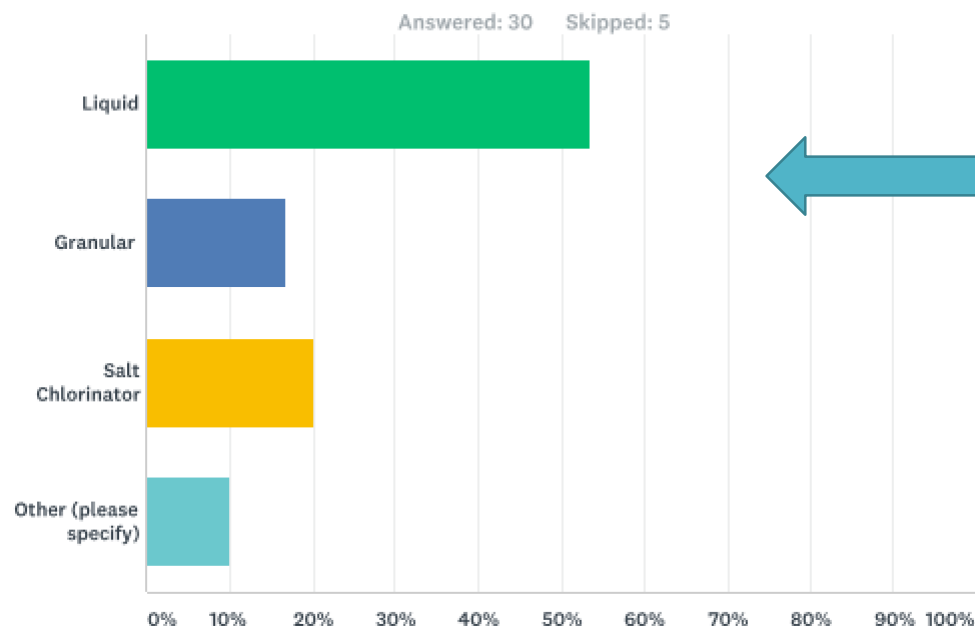
Water Saving

Q57 How often do you backwash?

Answered: 30 Skipped: 5



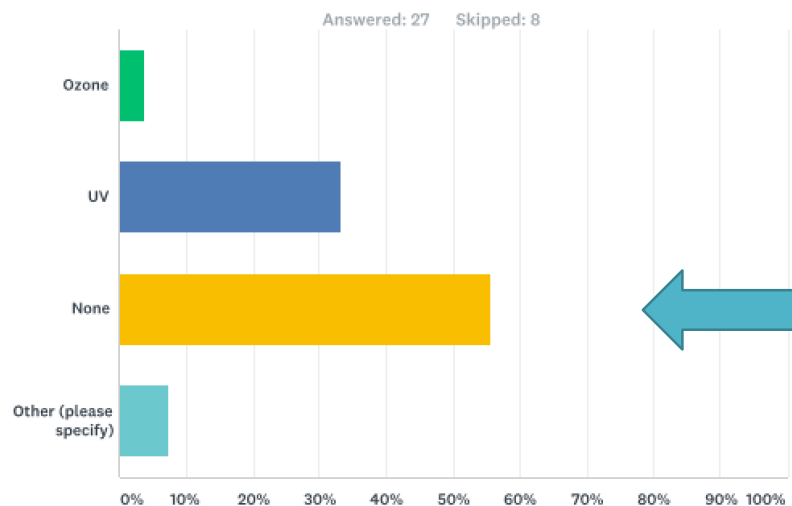
Q35 What type of chlorination system do you have?



Water Quality

Large proportion use more costly liquid chlorine

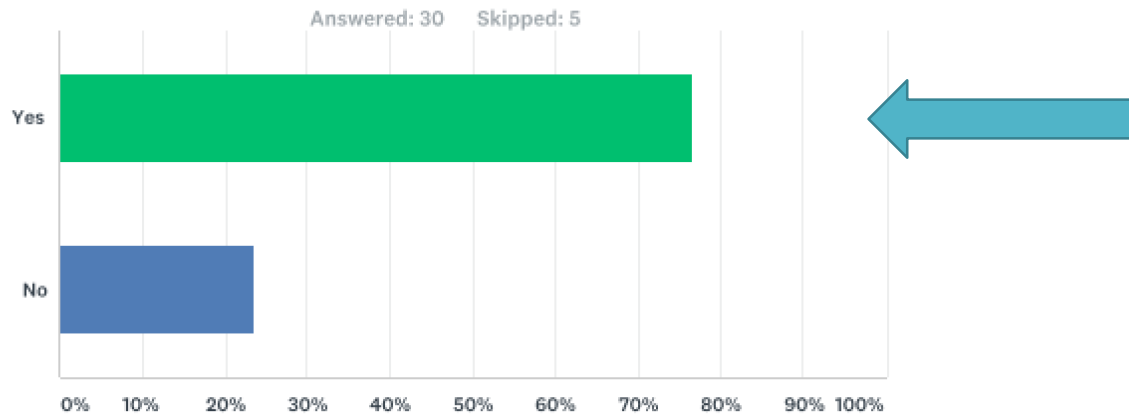
Q38 What type of secondary disinfection is used on site?



Large proportion do not use more effective secondary disinfection

Water Harvesting

Q56 Is excess water stored?



Good section of industry is storing water

ANALYSIS

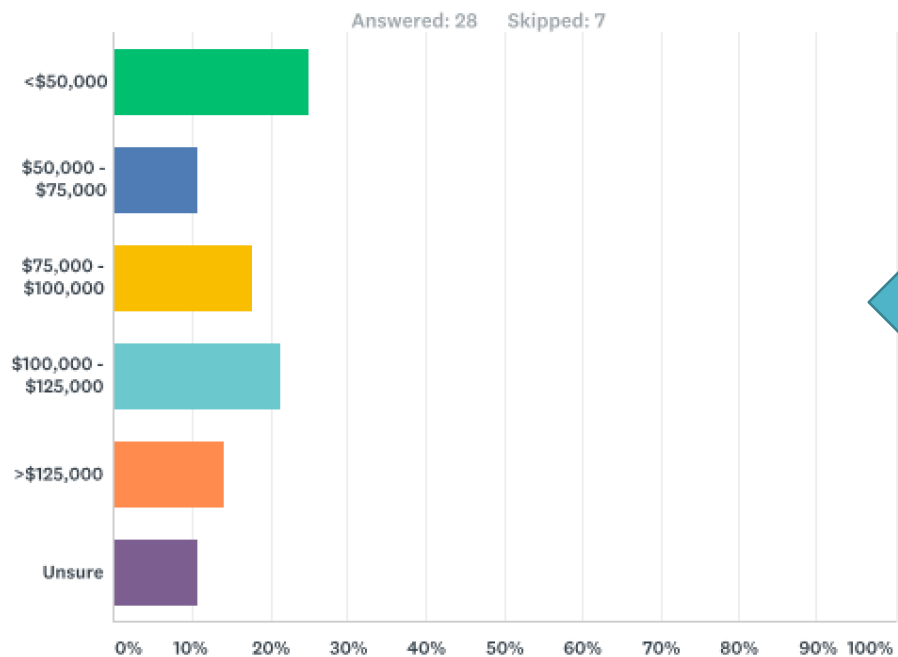
There is significant opportunity for the industry to move from traditional water methods to best practice:

- Low TDS chlorination (AIS style)
- Secondary Sanitation (Ozone & UV)
- Glass Filter Media
- Plus more training is needed on filter operations

Energy

Q60 How much would the centre spend per year on electricity?

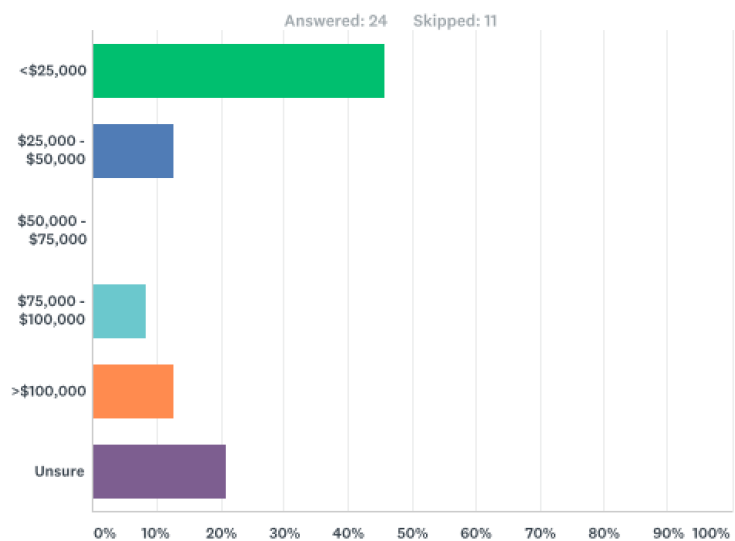
Energy Spend



Large \$ per year on power
Likely to increase with Electricity
price increases

100K

Q63 How much would the centre spend per year on gas?

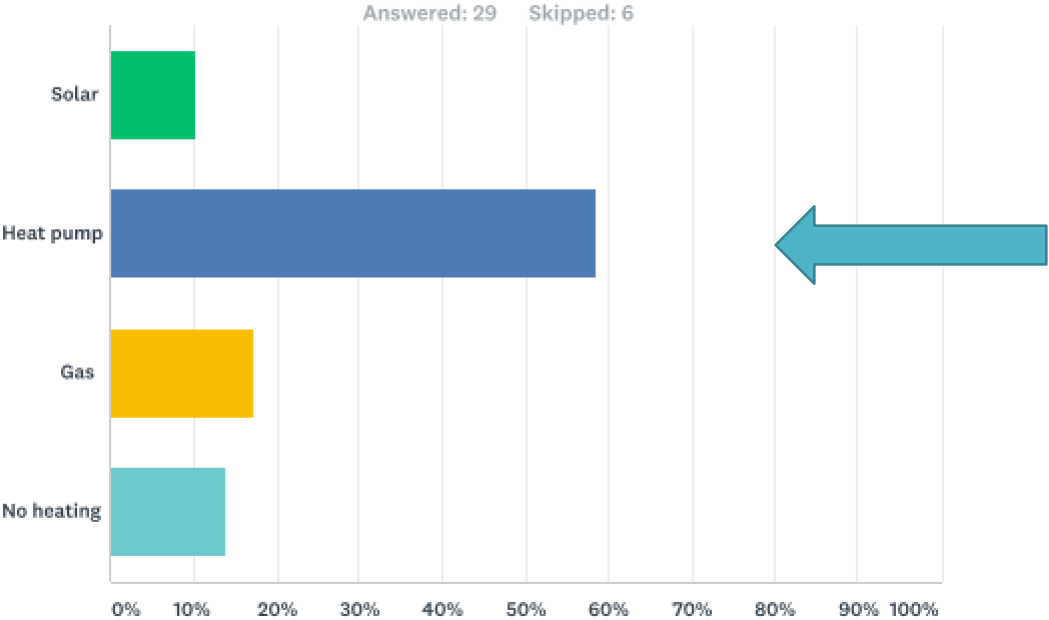


Centres Still using expensive gas

100K

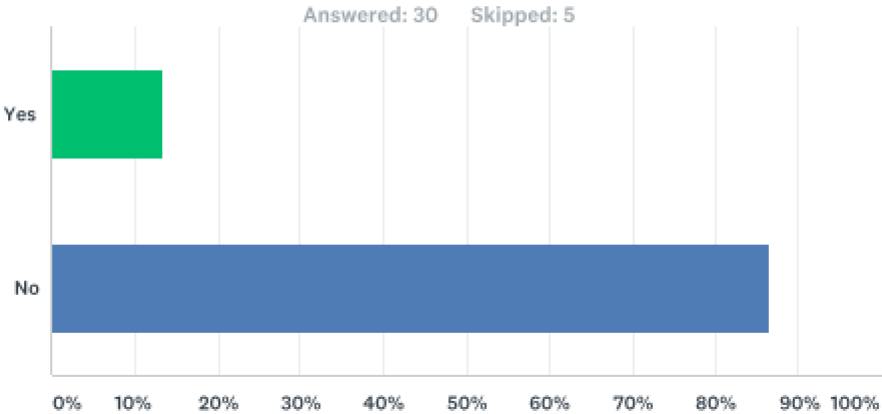
Energy Efficiency

Q40 What type of pool heating is on site?



Most centres use efficient heat pumps
Small Amount still use inefficient Gas

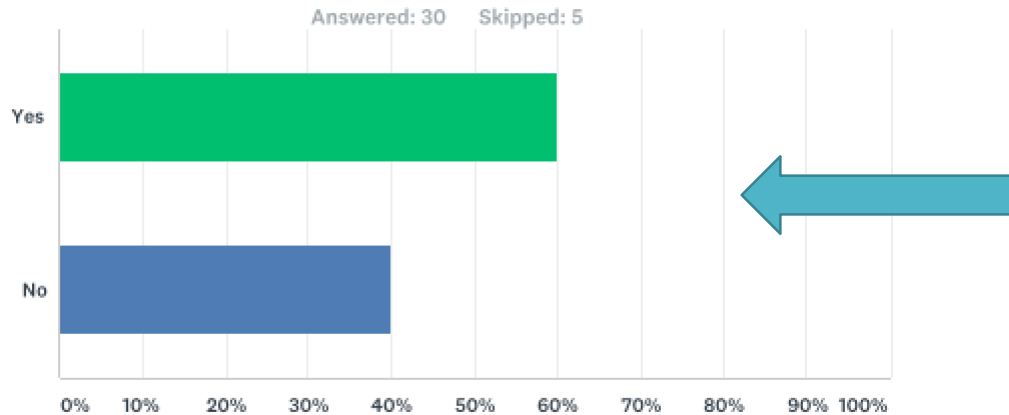
Q55 Does the centre have solar power for electricity generation (ie. Not for pool heating)?



Industry is yet to move into Solar PV

Energy Efficiency

Q58 Is energy efficient lighting used?



Industry is more than half way to efficient lighting

ANALYSIS

With Energy costs poised to rise significantly, there are opportunities to become more efficient:

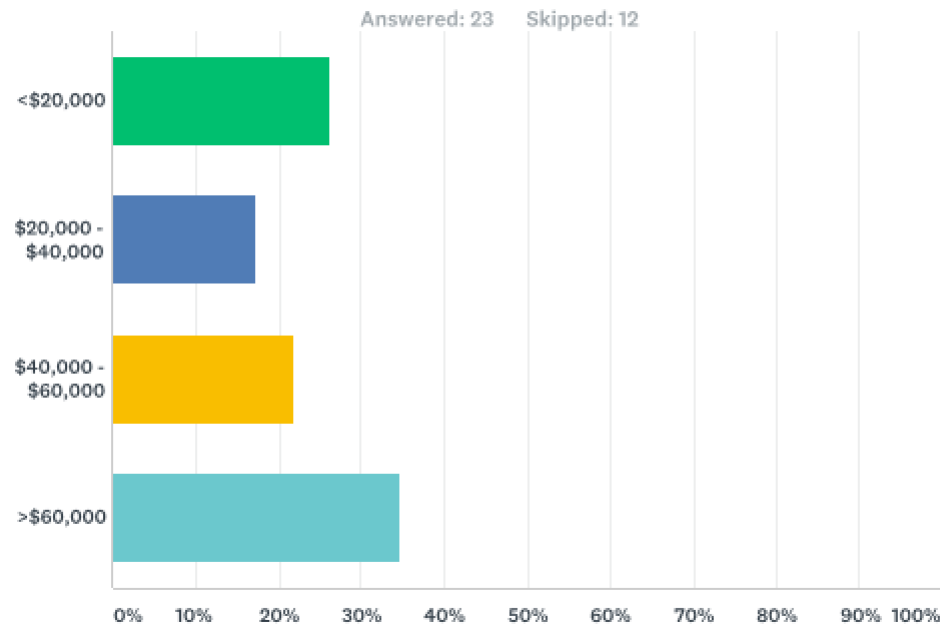
- Change to Heat Pumps
- Efficient Lighting
- Solar PV
- Tariff & Price negotiation

Electricity price growth



People

Q77 What is your monthly payroll amount?



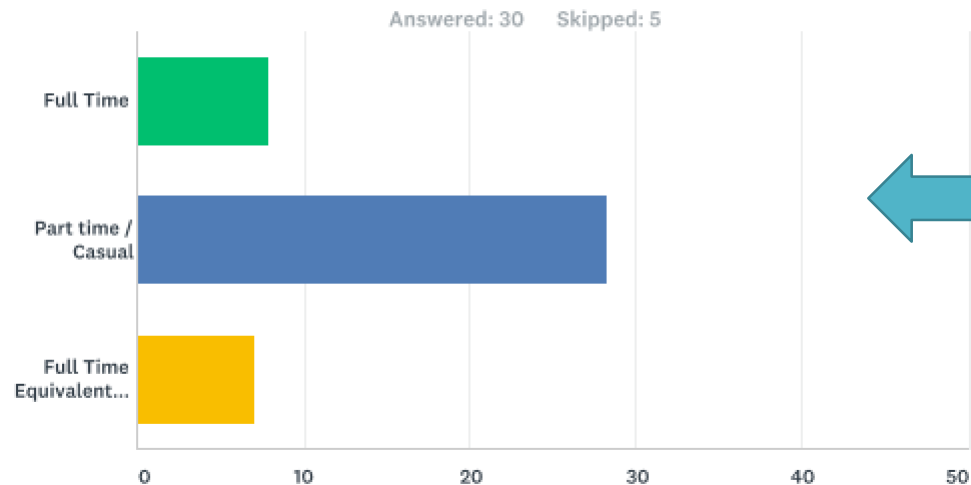
People

Employment is one of the largest costs

400K+ p.a

ALFAQ Member Benchmarking Survey

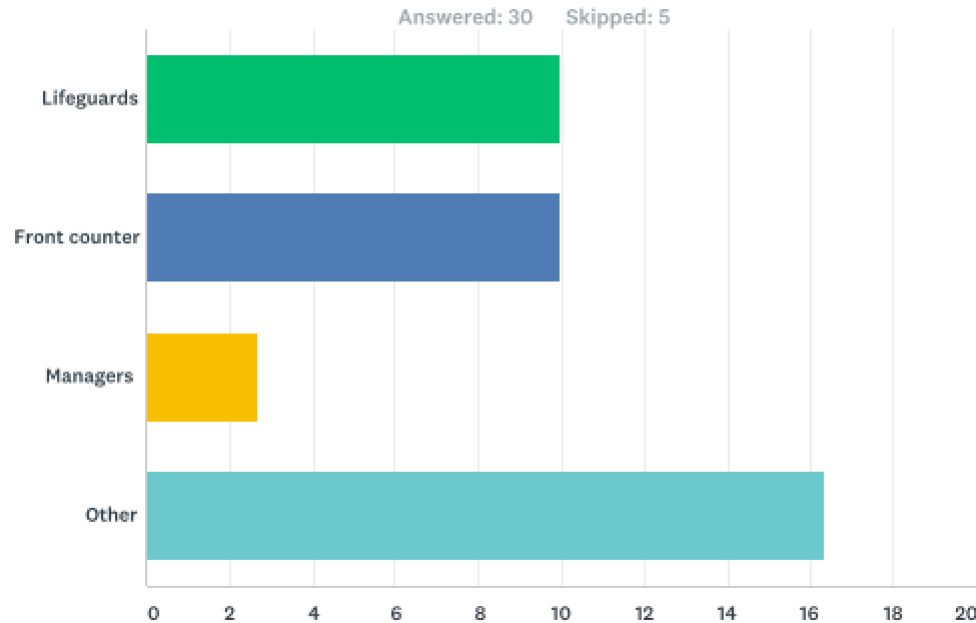
Q67 How many staff are employed on site?



Each Centre Employees on average 43 people
Estimated 300+ Aquatic Centres in Qld = 12,900 people

People

Q69 How many staff do you employ as:



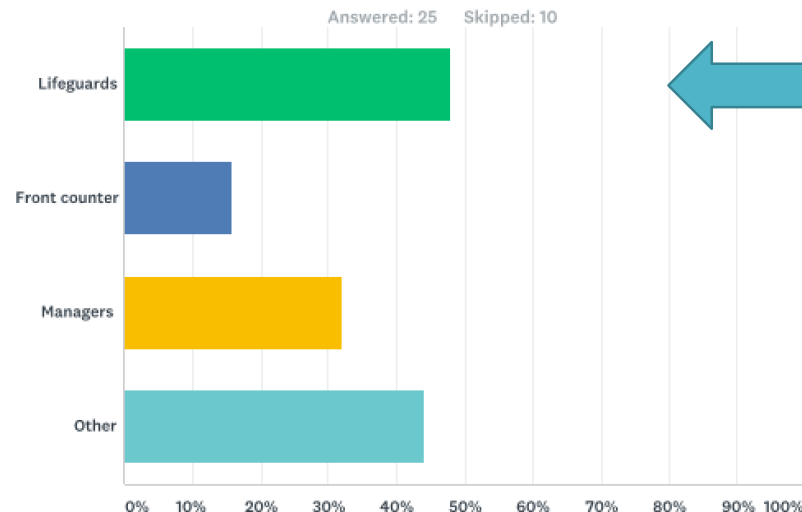
Key roles are lifeguards and Front counter



ANALYSIS

Staffing is one of the largest costs of operating an Aquatic Facility

Q70 Which role do you find hardest to recruit for:



Approx. half of respondents found lifeguards hardest to recruit for



Relative to the number of staff employed, Managers were also difficult

With little industry overall Management Training & the difficulty to recruit managers – there is an opportunity to improve our industry staff development processes

Summary & Next Steps

Summary

The Aquatic Industry has many amazing attributes:

- Estimated in Queensland to Employ over 12,000 people
- Estimated Visitation 4,500,000
- Many great programs, people, community activities
- Swimming is a large part of the Queensland Culture

However, we have many areas that we can still improve, that we can grow to:

- Become More efficient
- Provide More Community Benefit
- Provide Safer, more environmentally friendly facilities

Industry Scorecard

Improvement Areas



Next Steps

Proposed Next Steps

- Create an Aquatic Centre Benchmarking Audit Tool
- Lobby for funding to address weak areas across the state
- Collaborate nationally to see where Qld sits vs the rest of Australia
- Repeat the process every 2-5 years to determine industry changes