

CITY OF LONDON

Hampstead Heath, Highgate Wood and Queen's Park Sports facilities and activities - Pricing Benchmarking Report

January 2021



CONTENTS

1. Executive Summary	3
2. Introduction	Error! Bookmark not defined.
3. Benchmarking	7
4. Sports Fees and Charges Analysis.....	10
5. Concessionary Charging Policy	32
6. Conclusion	355
Appendix 1 - Competitor Prices (provided as a separate excel document)	36
Appendix 2 - Third Party Providers.....	36
Appendix 3 – Archive Search using https://archive.org/web	36
Table 1 – Summary of Our Price Setting Recommendations	5
Table 2 – Aims of the Report	6
Table 3 – Price Quality Framework as a Guide to Differential Pricing	8
Table 4 – Criteria Applied to Active Place Power (APP) Dataset	9
Table 5 – Athletic Meeting/Equivalent Hourly Charges	10
Table 6 – Athletics School Rates	11
Table 7 – Athletics Track Admission Charges	12
Table 8 – Season Tickets	12
Table 9 – Cricket Pitch Hire Charges	14
Table 10 – Football Pitch Hire (grass).....	16
Table 11 – Rugby Pitch Hire	18
Table 12 – Bowls Activity Charges	19
Table 13 – Pitch and Putt Activity Charges	21
Table 14 – Lido Admission Charges	23
Table 15 – Open Water Activity Prices.....	27
Table 16 – Tennis Court Hire Prices.....	30
Table 17 – Tennis Coaching Hourly Rates.....	311
Table 18 – Categories of Concessionary Users – Neighbouring Boroughs.....	34

1. Executive Summary

- 1.1. The City of London Corporation ('the City Corporation') has commissioned Max Associates to undertake a sports benchmarking exercise to inform the Division's fees and charges commencing April 2021/2022. Hampstead Heath (number 803392), Highgate Wood and Queen's Park Kilburn (number 232986) are registered charities, for which the City Corporation is the Trustee. The Hampstead Heath, Highgate Wood and Queen's Park Committee manages Hampstead Heath on behalf of the City Corporation and must take decisions in the best interests of the charity.
- 1.2. In this 2020 report we utilise Sport England Active Places Power (APP) database to refine and refresh the data from the benchmarking exercise previously undertaken by Max Associates. The APP data helps establish a new analysis of comparable facilities that are similar in facility type and are within specified travelling distances to those on offer at Hampstead Heath, Highgate Wood and Queen's Park.
- 1.3. The analysis includes a review of the recommendation outlined in the March 2020 Swimming Review and its recommendations for pricing, safety control measures and capital investment. These changes have been noted as part of the analysis of other providers identified in this report.
- 1.4. We have also taken into account the findings outlined in the 2017 Athletics Track Benchmarking exercise, and its recommendations of setting a fixed hourly charge for club use and discounted prices for track session and season ticket prices for club members. Where we have found a comparable offer, this has been included.
- 1.5. The report also includes an analysis on concessions and any schemes that we found that offer free access to specific groups. As part of the review, we consider how further refinement of the concessionary categories may help improve its effectiveness. The analysis also looks at the use of day tickets, family tickets and season tickets where identified.
- 1.6. The findings of the report include a summary table together with some key themes and recommendations that aim to help simplify the pricing structure.
- 1.7. Since the 2015 Benchmarking Exercise was undertaken the sport and activity sector has continued to adapt to changes in technology and the use of internet solutions for pitch and activity booking. Customers are increasingly accustomed to using these and for the younger age groups particularly, booking through traditional systems like phone or post are more likely to be seen as a barrier to participation.
- 1.8. This report includes more data on the extent to which booking activities online is now being used by providers either directly or through the use of third-party providers.
- 1.9. The timing of this report coincides with a challenging and wholly unexpected period brought about by the emergency restrictions imposed by the Covid-19 pandemic. Admission and activity price data normally available through Council and operator websites and booking pages has been effectively 'turned off' as the Government has restricted their use and

alternative enquiries by phone or through email have been delayed either due to staff furloughing or as facilities have not opened. This has impacted the amount of comparable data we have been able to collect.

- 1.10. The comparator tables used in the 2015 report have been re-populated with new data for 2020. The complete dataset has been provided as an Appendix to this report.
- 1.11. This period has seen extreme pressure on public and charitable sector finances with the result that all bodies providing sporting and leisure services are more seriously having to review their traditional approaches to provision as they attempt to balance revenues and costs.
- 1.12. We expect the long-term impact of the Covid-19 crisis on the public provision of sports and leisure services to reverberate for some years to come.

Table 1 – Summary of Our Price Setting Recommendations

NORTH LONDON OPEN SPACES	No Change	Increase with inflation	Increase Above inflation	Increase/ Decrease in line with Benchmarking	Proposed Concessions	Free Access Proposals	Price Increase
ATHLETICS TRACK			✓				✓
CRICKET			✓				✓
FOOTBALL			✓				✓
RUGBY			✓				✓
SOFTBALL/ ROUNDERS (HAMPSTEAD HEATH)			✓				✓
BOWLS			✓		✓		✓
CROQUET (Golders Hill Park)		✓					
PITCH & PUTT (Queen's Park)			✓		✓		✓
SWIMMING							
<i>Lido Day Ticket (Individual and Family)</i>		✓					✓
<i>Season Ticket</i>				✓			
<i>New Swim Monthly Membership</i>				✓			
<i>Bathing Ponds Day Ticket</i>			✓				
<i>Lido & Bathing Ponds combined Season Tickets</i>				✓			✓
TENNIS		✓			✓		
TENNIS COACHING		✓					

- 2.1. Max Associates was commissioned in July 2015 to carry out a fundamental review of current fees and charges and charging policy on Hampstead Heath, Highgate Wood and Queen's Park. This 2020 report provides an update to that earlier benchmarking exercise, using the Sport England Active Places Power database to refresh the data on facility type, location and travel distance to ensure that, where practical, a like for like comparison can be made.
- 2.2. By refreshing the list of facilities and collating up to date fees and charges information for the activities available at those locations, we have been able to make recommendations for pricing.
- 2.3. Aims of the report:

Table 2 – Aims of the Report

- a. Analyse comparators in relation to day tickets, family tickets, season tickets and pitch/court hire. For each comparator understand if online booking is utilised and who the service provider is.
- b. Understand the approach to concessions and any schemes to offer free access to specific group across all sports.
- c. Consider the options to simplify the range of ticket options for each sport. Recognising that online booking for football, rugby and cricket is being progressed for April 2021.

2.4. Context and General Industry Observations

- 2.4.1. Continuing pressures on all public bodies and charities demand from those who are responsible for their management, a need to constantly review all charges for activities and services that are provided.
- 2.4.2. Where outdoor sports in parks and open spaces are concerned, there is continuing evidence of a diverse approach to fees and charges with base price levels varying across local authorities and other providers for similar services and activities.
- 2.4.3. Local Authorities are in the main continuing to provide outdoor pitch booking services although the function is carried out by numerous departments including parks, sports and allotments. There is growing evidence that promoting access to open spaces is also being shared with third party providers.
- 2.4.4. Obtaining access to basic price information has been more challenging in 2020 than in 2015. We found access to open data often complicated by the growing use of phone apps or the need for registration and sign up to provider websites in order to find price information.

- 2.4.5. We found relatively fewer providers offering comparable data on some sports, like softball or pitch and putt, which we expect may be due to both the timing of our search (winter) and the Covid-19 restrictions. For others like bowls, the fact that this sport is generally in decline is also a contributory factor.
- 2.4.6. Whilst many local authorities continue to offer particular policies for concessionary users, we found some variation between the terms and conditions of the concessionary schemes between those authorities. Across Hampstead Heath, Highgate Wood and Queen's Park the City Corporation provides a concession discount at 40% of the adult price, with rounding. When comparing the charges from other providers we have referred to this level of discount on concessionary prices.

3. Benchmarking

3.1. General Observations

- 3.1.1. Providers in general, continue to have a wide range of price options and packages for facilities and services. Variations that include prices at off-peak and peak times tend to be less promoted. Activity charges per hour or per session are common and we have seen clear evidence of charges that distinguish between resident and or non-resident and where membership is a pre-requisite, between member and non-member. These variations make overall comparisons more difficult between authorities/providers.
- 3.1.2. In the main, where the provision is effectively privately controlled like a sports club or franchise operation, operators tend to offer fewer variations to a standard price for use. The price setting is commercially driven and there is less overall difference between standard prices and prices for children or older age groups compared to public sector providers.
- 3.1.3. In comparison, public bodies such as local authorities and charitable trusts provide a complex range of discounting to both concessionary groups and regular users. We found concessionary pricing related particularly to age and economic status although there was no evidence that these applied consistently similar discounting criteria in setting prices for vulnerable groups.
- 3.1.4. Where quality differences exist, higher grade facilities command premium prices. We found this to be particularly true of grass pitches with a number of public bodies and other providers using pitch grading as a price differentiator.
- 3.1.5. We found free use particularly for outdoor activities to be the exception rather than the norm. We found evidence of free access applying to the use of some tennis courts in the neighbouring local authority of Haringey although in general where free use is permitted providers use their discretion as to the number and type of courts that are free and for what periods. The booking provider OpenPlay provides more background to the opportunities for free tennis in London at <https://www.openplay.co.uk/blog/best-free-tennis-courts-in-london/>
- 3.1.6. Where local authorities have outsourced their services to Trust or other community type organisations, those operators continue to apply the concessionary policy of the relevant authority but have also developed activity specific or all-inclusive membership offers that include loyalty type discounted prices on a large number of activities over the standard price for casual pay and play customers.

3.1.7. When viewing historic local authority fees and charges reports and in setting prices for 2020-21, Tower Hamlets¹ and Harrow have chosen to apply discretionary judgement and increased charges above the underlying rate of inflation². In terms of Harrow the decision is based on a move towards full cost recovery³.

3.1.8. A summary of our findings for 2020:

- Fewer Authorities/Providers are promoting traditional modes of differential pricing including peak and off-peak times as a basis for pricing.
- There is evidence of differences in pricing being used for residents and non-residents and for members and non-members.
- Concessionary prices continue to be offered although there are variations on the level of discount, who is offered a concession and when concessionary use might apply.
- Free use of outdoor sports facilities is limited and increasingly uncommon.
- Where quality distinctions are made – higher grade pitches are charged at high rates to lower grade pitches.
- In responding to continuing pressures in finance, local authorities and other providers, in setting annual fees and charges are not averse to raising prices above inflation.

3.2 Quality

3.2.1 Since 2015 there has been investment in the tennis provision at Hampstead Heath and Queen's Park which has improved the playing surfaces. We understand that for the remaining sports, overall standards have been well maintained and their upkeep remains on par with the assessment made in 2015.

3.2.2 The price quality framework set out in table 3 is used to provide some context to the analysis.

Table 3 – Price Quality Framework as a Guide to Differential Pricing

High Quality/High Price	Low Quality/High Price
Protect current arrangements to a level the market can sustain	Increase quality to maintain income potential
High Quality/Low Price	Low Quality/Low Price
Consider options for price increases to reflect investment and levels of demand	Consider options for investment in existing quality or change provision in line with strategic aims.

3.3 Price

3.3.1 In order to make effective comparisons between the facilities and those available in of neighbouring Boroughs, the Sport England Active Places Power database was searched and reviewed.

¹ [Tower Hamlets Council - Decision - Fees & Charges 2020-21](#)

² [Decision - Fees and Charges 2020/21 \(harrow.gov.uk\)](#)

³ [Meeting: \(harrow.gov.uk\)](#)

3.3.2 The Sport England database provides a full dataset of circa 12,500 facilities across England listed by age, facility type, management type and location. The dataset can also be searched using post code analysis to derive journey times from a particular point.

3.3.3 For ease of reference the post code of the Parliament Hill Fields Lido was used as a base point.

3.3.4 The database was screened to ensure the comparator sites and facilities resembled as close as possible those at Hampstead Heath, Highgate Wood and Queen's Park. A summary of the specific criteria used is set out below:

Table 4 – Criteria Applied to Active Place Power (APP) Dataset

Activity	Facility Type	Journey time
Athletics	8 lane synthetic track	
Football, Cricket, Rugby	Adult/Junior Grass pitch, no floodlights but with changing facilities; Pay and Play; Non School sites.	Up to 30 minutes by car
Softball	Pay and play	Up to 30 minutes by car
Tennis	Macadam surface; no floodlights; not overmarked	Up to 30 minutes by car
Outdoor Pool Swimming	Greater than 250 metres square of outdoor swimming water; pay and play; with changing facilities.	30-minute travel times by car

3.3.5 As the APP does not hold data on venues for open water swimming, pitch and putt, bowls croquet or angling, a general sweep of the facilities within and around London was undertaken.

3.3.6 Our original intention was to utilise the APP dataset over a 30-minute drive time. During our research it became apparent that many of the locations were either closed, not operating or where uncontactable by phone or email. Whilst the data includes those providers within the catchment range, only those we were able to provide information on have been included.

3.3.7 It is important to recognise that where facilities may be booked via a third-party app, the price charged may in some cases include the handling fee applied by the app provider. As a result, the price may differ from the income that the particular Council might receive directly from its own sale of the same item.

3.3.8 The dataset is provided as an Appendix to this report.

4. Sports Fees and Charges Analysis

4.1. Athletics (Quality Medium/Price Low)

- 4.1.1. The City Corporation commissioned benchmarking in 2017 with particular emphasis given to the charges for club training. That review concluded by recommending that clubs be charged a fixed hourly rate for use based on their hire periods on Tuesday and Thursday evenings throughout the year. The rate set at that time was £22.56 per hour. In 2020-21 the hourly rate for club training was increased by inflation to £23.77 per hour.
- 4.1.2. Due to social distancing restrictions, athletics meetings were restricted from March 2020. Despite the easing of Covid-19 restrictions during the year, venues such as the Croydon Sports Arena remain closed. Of the 11 comparable facilities identified, only 3 were providing publicly accessible information on the hourly charge for meetings.
- 4.1.3. The City Corporation charges for meeting based on a full day rate (7.5 hours from 9-00am -16.00pm or a half day rate comprising 3.5 hours either 9.00am-12.30pm or 1.3.00-16.30pm). None of the facilities we researched offered a flat fee price based on full day or half day use. We have used the equivalent hourly rates as a basis for comparison.
- 4.1.4. The highest charges continue to be levied at Enfield Lee Valley (£80 per hour) equivalent to £600 for a full day or £280 for a half day. The Linford Christie Stadium hourly rate is £77.65, equivalent to £582.37 for a full day or £271.80 for a half day. The QE2 Stadium charges the lowest rates at £37 per hour, equivalent to £277.50 for a full day or £129.50 for an equivalent half day.
- 4.1.5. The City Corporation ranks at the lower end of the benchmark, charging the equivalent of between £35.13 per hour for a full day and £37.85 for the half day for a booking Monday to Friday. The rates increase at weekends and bank holidays to £43.80 for the full day and £46.85 per hour based on use for a half day. At the time of the search, it was not possible to determine whether a minimum hire period was applied to meeting bookings at comparable venues.

Table 5 – Athletic Meeting/Equivalent Hourly Charges

ATHLETICS	Athletics Midweek (Monday -Friday)	Athletics Weekend and Bank Holidays	Equivalent/ Hourly Charge
City Corporation*- Hampstead Heath FULL DAY	£263.50*	£328.50	£35.13/£43.80
City Corporation*- Hampstead Heath HALF DAY	£132.50	£164.00	£37.85/£46.85
Linford Christie Stadium FULL/HALF DAY	£582.37/£271.78	n/a	£77.65
Lee Valley FULL/ HALF DAY	£600.00/£280.00	n/a	£80.00
QE2 FULL/HALF DAY	£277.75/£129.50	n/a	£37.00

*Full Day 7.5 hours; Half day 3.5 hours

- 4.1.6. We feel that there is an opportunity to re-package the price based on an hourly charge rather than a flat fee basis and introduce minimum hire periods for hire where necessary. With this change there is an opportunity to increase the hourly charge bringing it closer to the level required to cover the operational costs of the track.
- 4.1.7. The discount rate offered for school hire has continued to weaken. Only the Linford Christie Stadium publicised a Sports Day rate for the use of their athletics stadia. The remaining facilities have reverted to an hourly charge for schools. In this regard, the City Corporation currently charges £79 for am or pm use, the equivalent of £22.57 per hour and £158 for a full day (equivalent to £21.06 per hour).
- 4.1.8. In comparison, the Linford Christie Stadium levies a charge of £181.20 for a 3-hour booking by Borough schools (the equivalent of £60.40 per hour) and £224.95 (or £74.98 per hour) for non-Borough. Additional hourly rates are charged out at £72.95 and £91.60 respectively.
- 4.1.9. The Lee Valley Athletics Stadium charges a flat rate of £75.00 for school use. An equivalent full day booking would equate to £562.50 or £262.50 for a half day.
- 4.1.10. The rates at the QE2 in Enfield are £32 per hour. This takes the cost of a 3.5 hours half day booking to £112 making this the lowest priced school offer in the sample.
- 4.1.11. If we look at the discount rate against the standard rate for school use, at 40% this is particularly high at the City Corporation compared to others in the benchmark.
- 4.1.12. Again, we feel that there is scope to increase the hourly rate to help offset the operational costs of providing the service whilst still retaining a sizeable if not reduced concession discount for schools in line with others in our sample.

Table 6 – Athletics School Rates

	Schools Full Day*	Schools Half Day*	Equivalent/ Hourly Charge	Discount offered
City Corporation*- Hampstead Heath	£158.00	£79.00	£22.57/£21.06	40%
Linford Christie Stadium	Borough £453.00/Non-Borough £562.35	Borough £181.20/ Non- Borough £224.95	£60.40/£74.98	23%/3.5%
Lee Valley**	£562.50	£262.50	£75.00	6.25%
QE2*	£240	£112	£32.00	13.6%

*Full day 7.5 hours; Half day 3.5 hours

- 4.1.13. We found a good level of data to enable an effective comparison to be made on track admissions prices. Interestingly the current City Corporation charges are advertised as a day ticket price. We found no other comparators offering the same offer. Instead, many offered a fixed period (1 hour or 50 minutes) session price.
- 4.1.14. Session prices ranged from £8.00 per hour at the New River Sport & Fitness to £3.50 per hour at Perivale Athletics track in Ealing. The current City Corporation charge sits within this range but we would suggest that the descriptor be changed from Day Ticket to a time

limited (1 hour or 50 minutes) 'Track' session. We understand that this aligns with the current online booking arrangements.

4.1.15. Concessionary discount rates for athletics vary considerably across competitors. A number do not appear to offer a concessionary price for use.

4.1.16. There appears to have been a downward trend since our 2015 report in reducing the application of concessionary charges in this category. Where a comparison is possible, the differential price offered by the City Corporation is at the upper end of the benchmark, and it may wish to consider reducing the discount further.

Table 7 – Athletics Track Admission Charges

Athletics Individual Admission	Individual		Discount offered 2020
	Adult	Concession	
City Corporation – Hampstead Heath	£4.50	£3.00	40%
Battersea Park Millennium Arena/ and Norman Parks Athletics track	£5.00	£3.50	30%
Lee Valley Athletics	£4.00	£2.70	32.5%
Linford Christie Stadium	£5.35	£3.25	40%
Perivale Park Athletics	£3.40	£3.40	0%
Tooting Bec Stadium	£4.70	£4.70	0%
David Weir Stadium	£5.25	£5.25	0%
New River Sport & Fitness	£8.00	£8.00	0%

4.1.17. Of the comparators we found information on, only 4 providers expressly advertise prices for annual season tickets. Prices in this category varied from £160.20 at Linford Christie Stadium £380 at the QE2 Stadium. The rates charged by the City Corporation at £79 for Adult and £47.50 for concessions were again at the lower end of the sample. A number of the facilities do offer discounted rates on these prices for club athletes, but we were not able to obtain full information to enable an effective comparison to be made for this category. We understand that the City Corporation currently offers a discount on season ticket fees to club members.

Table 8 – Season Tickets

Athletics Annual Season Tickets	Individual		Discount offered 2020
	Adult	Concession	
City Corporation – Hampstead Heath	£79	£47.50	40%
Lee Valley Athletics, Enfield	£380	£280	26%
Linford Christie Stadium, Hammersmith & Fulham	£160.20	£80.20	50%
Norman Park, Bromley	£320	£215	33%

- 4.1.18. A number of facilities do provide specific options for monthly, 3 monthly and six-monthly passes and /or direct membership. Where the athletics track is part of a large sports complex, then use of the athletics facilities are included in the benefits of an inclusive membership.
- 4.1.19. Whilst we found little evidence that providers offered free use of an 8-lane athletics track, the 6-lane facility at Paddington Recreation Ground was offering free access
- 4.1.20. There was good evidence that booking individual track times via an online app was possible at a number of locations. There was no evidence however that the online functionality extended to booking meeting dates and times. All providers required interested customers to either speak to them directly or complete an online enquiry form.
- 4.1.21. We understand that City Corporation continues to improve the athletics facilities and is submitting a capital bid to secure funds for reconstructing the track in order to retain Clubmark status⁴.

Athletics: Key learning points

- As we observed in our 2015 report, none of the comparators differentiated between mid-week and weekend use of the track preferring to operate a set hourly rate.
- Rates for school use continue to be discounted but the level of discount is falling.
- Prices for annual season ticket at the Parliament Hill Athletics Track are low compared to other fee charging providers.
- A number of competitors like Lee Valley and New River, that have a track, include an athletics' offer within their direct debit membership options. Although this is not widespread, the City Corporation may wish to consider the merits of this as part of any future developments.

Athletics Track Price Recommendations

**Price Increase Above Inflation.
Consider phasing of increase to achieve aims**

4.2. Cricket (Quality High/Cost High/Middle)

- 4.2.1. Cricket charges have been compared with 15 other providers. In terms of pitch hire, seven authorities including the City Corporation differentiate between mid-week and weekend use with the remaining charging a flat fee for use. Many authorities include the charge for use of changing rooms with the hire fee. Authorities like Enfield only provide pavilion and changing facilities with the hire of their Grade One pitches and a number of authorities also differentiate their prices depending on whether the hire is full day, or part day or evening only.

⁴ <https://sportenglandclubmatters.com/club-mark/>

- 4.2.2. If we include the hire of changing rooms in the adult hire fee for weekend use, then a game at the City Corporation would be the equivalent of £151 (£105 pitch hire + £46.00 changing rooms) at Parliament Hill at weekends and cheaper at the Extension (£96.00 for pitch hire).
- 4.2.3. On this basis, we found the City Corporation operates in the mid-point of the comparator table (see overleaf) with six other venues being more expensive (The Walker Ground, Enfield (£250); Dulwich Sports Ground (£240); Council pitches in Harrow (£230), Peter May Sports Ground, Waltham Forest (£216), Douglas Eyre Sports Ground (£190) and Boston Manor, Hounslow (£178).
- 4.2.4. We could find few if any examples of up-to-date information on the separate charges for the hire of changing rooms at weekends. We only found rates for Southwark Council who advertise a rate of £55.50 for hire.
- 4.2.5. Weekday rates vary from the highest £150 at 2 separate venues in Waltham Forest and one in Hounslow to the lowest £72.31 a Grade B classified pitch at Ealing.
- 4.2.6. Junior pitch rates are levied by 5 out of the 16 providers. The remaining 9 providers make little distinction between hire rates for adult or junior use. Where they do, the rates vary from £42 (Islington) to £83 (Merton). At £63, the City Corporation sits in the midpoint of comparator prices. In addition, a number of venues offer rates for school use although we found this only applied to 5 of the venues in the sample.

Table 9 – Cricket Pitch Hire Charges

Cricket pitch	Weekend 2020-21 (incl. changing)	Midweek 2020-21 (no changing)		Discount
	Adult	Adult	Junior	
City Corporation – Hampstead Heath and Highgate Wood	£151.00	£96.00	£63.00	40%
Harrow (Council sites)	£230.00	£230.00	£115.75	50%
Ealing (Council sites)	£91.60	-	-	-
Islington (Wray Rec)	£99.00	£99.00	£42.00	58%
Merton/Brent (Council sites)	£120.00	£120.00	£83.00	31%
Southwark (Council pitches)	£80.00	£80.00	£49.50	38%
Waltham Forest (Peter May Sports Centre)	£216.00	-	-	-

- 4.2.7. In terms of midweek use the price difference between adults and junior rates varied from 70% (Hounslow) to 31% (Merton). At circa 40%, the City Corporation prices were at the lower end of the sample.

Cricket: Key learning points

- Competitors are more likely to advertise the total price of pitch hire and use of pavilions as opposed to advertising both prices separately. If most clubs tend to book both, it may be simpler to offer one all-inclusive price. If pitch hires and pavilion use are not regularly booked together, then keeping separate charges would appear reasonable.
- Discount rates for junior use at circa 40% of adult fees are towards the lower end of the comparators we found. This current level of discount remains competitive.

Cricket Price Recommendation

Price Increase Above Inflation

4.3. Football (Quality High/Cost High/Middle)

- 4.3.1 Hire rates for football have been compared with 28 other providers. Of the comparators we found, three differentiate their pitches in terms of quality, charging more for top grade pitches. Some providers like the City Corporation charge additional prices for use of the changing facilities. A standard pitch plus changing at the City Corporation sites is £136 (£90+£46).
- 4.3.2 The highest pitch rates were charged at the London Marathon Playing Field at Greenford and at Dulwich Sports Ground in Southwark. Both charged £174 for their top-grade pitch. The most expensive Council pitches were found at Harrow (£163.30).
- 4.3.3 The City Corporation's Epping Forest Wanstead Flats site had the cheapest hire rates (£73.50 Saturdays and £89 for Sundays). We found that Southwark Council also promoted school pitches for hire at £30.
- 4.3.4 Hire rates at the City Corporation (at Hampstead Heath) sit in the lowest quartile against competitors ranking 19/28 for pitch hire only. Again, as the City Corporation separate the rates for the use of the changing rooms, it is not necessarily easy to compare prices across the sample. If changing room fees are added, then the City Corporation rates rise to £136 per game, ranking the City Corporation 5/28 in comparison. We feel therefore that there is scope to raise pitch hire costs but not necessarily the hire rates for changing rooms.
- 4.3.5 In general terms, we found that junior rates are lower than a number of other providers. The highest junior rates are charged at Harrow (£100.90). Islington, Enfield and the Royal Borough of Kensington & Chelsea all currently charged more for junior use than the City Corporation.
- 4.3.6 Some providers continue to offer an off peak and peak price option as well as differentiated between hire charges for Saturdays and Sundays. Junior use in some cases is promoted on Sunday afternoons with some evidence that junior use is also limited to lower grade pitches.

Table 10 – Football Pitch Hire (grass)

Football Saturdays	Pitch Price 2020-21		Discount offered 2020-21
	Adult	Junior	
City Corporation, Hampstead Heath and Highgate Wood	£90.00	£54.00	40%
City Corporation, Wanstead Flats	£73.00 (Sat) /£89.00 (Sun)		
Barnet	£81.50	£40.50	50%
Haringey New River	£80.00	£50.00	38%
Haringey (Other Council pitches)	£110.85	£48.95	56%
Brent	£83.00-	£50.00	40%
Islington	£98.60	£58.50	40%
Royal Borough of Kensington & Chelsea	£98.90	£64.80	35%
Enfield	£121.00	£66.00	50%
Southwark	£95.00	£47.00	50%
Hammersmith & Fulham	£99.60	£45.10	55%

- 4.3.7 Our sample included nine providers who advertised rates for schools. There was some evidence that the rates for school use was further discounted against the junior hire rates although the rates for schools varied between £25.95 in Haringey to £77 in Harrow.
- 4.3.8 We identified a few instances where providers had introduced new categories of prices for hirers. This included prices for borough and non-borough schools/users and for chartered and non-chartered clubs.
- 4.3.9 Although we do not see either of these options as relevant at this time, Officers may wish to note these measures as part of continuing developments in pricing strategies.
- 4.3.10 Booking a football pitch is increasingly available online. As well as being available through operator specific apps from GLL, Fusion, Everyone Active and The London Playing Fields Foundation – www.lpff.org.uk; Openplay - www.openplay.co.uk; Playfinder – www.playfinder.com/london; PlayFootball - www.playfootball.net are also operating in the sector.
- 4.3.11 In terms of pitch bookings, we found that in general local authorities per se were more likely to still require customers to phone in with requests or complete applications online. Where booking online was an option, all providers were in the main working in collaboration with established partners including recognised leisure software providers like Gladstone MRM and Legend or specialist pitch booking providers like OpenPlay, iDVerde and the London Playing Fields Foundation. We only found evidence were one local authority Enfield was using its own bespoke software Zipporah.

Football: Key learning points

- Current hire charges for pitch only use is lower than a number of competitors. Our understanding is that the pitches are of good overall quality and therefore there is scope to increase fees.
- Whilst we encourage the fees to be increased for pitch only hirers, we feel that there is limited potential to increase the hire charges for the changing facilities.
- Some authorities continue to use Saturday/Sunday as a means of identifying periods of high and low demand.
- Providers continue to apply a discount rate for Junior use against the adult price. We found evidence that the rates vary between 30-55% with a number of providers directing junior use to periods of lower demand or onto pitches of lower quality.
- There is strong evidence of the ability to book football pitches online. A number of providers are operating in this area and we found that a number of Council's were referring enquiries to third party websites.

Football Price Recommendation

Price Increase Above Inflation

4.4 Rugby (Quality High/Cost High/Middle)

- 4.4.1 Pitch hire rates have been compared with 14 other provides. Whilst some providers offer the use of the changing rooms along with pitch hire, it is not always made clear from their prices. Due to the Covid-19 restrictions, hirers are not permitted to hire changing rooms at present and therefore we have used the basic pitch hire price as a guide for the comparison.
- 4.4.2 At £90.00 for pitch hire, the City Corporation is at the midpoint of comparators. The highest charges levied by a local authority are at Barnet (£118.98). Hammersmith & Fulham, Southwark and Enfield Councils also charge more.
- 4.4.3 Junior rates are on par with other providers with the City Corporation offering an average discount differential between adult and junior rates. A look at the current rates offered at Boston Manor confirms that some providers are not averse to charging higher rates from junior use over other providers.
- 4.4.4 There is some evidence that providers do offer some further discount on hire by schools. In our sample we found the publicised rates vary from £25.95 to £69.45.
- 4.4.5 We found evidence that booking a rugby pitch were being advertised as an option in a number of online apps available either through Council websites or via third party operator apps. Whilst these apps provided information on rugby pitches, the availability of rugby pitches and their particular prices were less common to view than other sports like football

and cricket. It is our view that booking a rugby pitch online is less well designed than for other sports.

Table 11 – Rugby Pitch Hire

Rugby	Pitch Price 2020-21		Discount offered 2020-21
	Adult	Junior	
City Corporation – Hampstead Heath	£90.00	£54.00	40%
Southwark	£95.00	£47.00	50%
Brent	£90.00	£53.00	42%
Hammersmith & Fulham	£99.65	£62.45	38%
Barnet	£118.28	£58.64	50%
Hounslow (Council Pitches)	£75.00	£58.54	32%
Boston Manor (Hounslow)	£98.00	£70.00	29%
Hackney Marshes (Hackney)	£93.60	£44.30	55%

Rugby: Key learning points

- Pitch only charges are comparatively low when compared to competitors so there appears room to increase these.
- Discount rates for junior use at 40% are more generous than a number of comparator providers where discounting is offered.

Rugby Price Recommendation

Price Increase Above Inflation

4.5 Softball/Rounders (Assumption Quality of Facilities High)

4.5.1 We found a total of six providers who provided public information about hire charges for Softball. Hammersmith and Fulham charged the highest fees at £99.70 including use of a changing room. Rates at the Hub in Regents Park and at the Council sites in Harrow were £82.50 and £81.40 respectively. Both are somewhat higher than the rates charged currently by the City Corporation who do not offer changing rooms as part of the hire.

4.5.2 The cheapest rate we found was at Woodfield School in Brent (£30).

4.5.3 We found good evidence that the interest in softball as a sociable and fun activity is growing. Online providers like Go Mammoth (<https://www.gomammoth.co.uk>) advertise meet up, social games and league opportunities widely using social media. The company offers its members softball opportunities at local venues in and around the capital. A review

of their website suggests that the company identifies and pre books venues and then uses its staff to promote new activities to its growing list of members.

- 4.5.4 As well as reviewing prices, there is further potential to increase the interest in softball by collaborating with operators like Go Mammoth in the joint marketing of the facilities

Softball: Key learning points

- The number of overall providers offering comparable outdoor facilities for Softball appears to be quite small.
- Current rates for softball are generally lower than a number of competitors.
- The interest in softball as a sociable and fun sport is increasing. We recommend that Officers consider the merit of working with Go Mammoth to increase the awareness and use of softball facilities to the London market.

Softball Price Recommendation

Price Increase Above Inflation

4.6 Bowls (Quality of Facilities High/Price Low)

4.6.1 We found limited information of alternate providers for bowls and croquet.

4.6.2 For bowls, activity charges the City Corporation were ranked lower/mid in comparison to the four other providers we identified. There is therefore some scope for increase above inflation.

4.6.3 In a bid to encourage younger players most providers offer a junior option and the discount off the adult prices ranged from 25%-48%.

Table 12 – Bowls Activity Charges

Bowls	Hire charges 2020-21		Discount offered 2020-21
	Adult	Junior	
City Corporation – Hampstead Heath	£4.00		
Finsbury Square, Islington	£7.00		
Tower Hamlets (Council sites)	£2.90	£1.50	48%
Merton (Council sites)	£7.50	£6.00	20%
Wimbledon Park Bowls Club (Merton)	£10.00	£7.50	25%

4.6.4 Two providers, Tower Hamlets and Merton also offered a season ticket option priced at £40.60 and £130 for adults respectively. This equates to a factor of around 14 times the

adult price in each case. To encourage take-up, the City Corporation may wish to consider introducing this as a new price category from 2021-22.

- 4.6.5 Albeit from a relatively low base, prices charged by the Tower Hamlets local authority were raised above inflation. Printed records of the Council's Fees and Charges report for 2020-21 shows that price increases of 7.1% for junior price and 6.7% on the cost for an Adult leisure pass holder were approved⁵.

Bowls: Key learning points

- Our search on bowls prices identified a small number of comparable providers.
- Where we were able to establish the comparisons, we found that rates charged were generally ranked low compared to others.
- A number of alternate providers also included a junior price and there was evidence of season ticket prices being available.
- To increase participation, consideration could be given to the development of the online offer for public pay and play bowls activities.

Bowls Price Recommendation

Price Increase Above Inflation

4.7 Croquet (Quality of Facilities High/Price Low)

- 4.7.1 Our analysis recognises that the facilities for croquet involve the shared use of the Parliament Hill bowling green.
- 4.7.2 We found only one comparator provider advertising prices for croquet.
- 4.7.3 Sydenham Tennis Club charge £40 for a 3-hour session and £20 per hour thereafter. This equates to between £13-£20 per hour which is considerably higher than the charges at the City Corporation.
- 4.7.4 Given the limited data for comparison, there may not be sufficient evidence on which to provide a recommendation for 2021-22 suffice to say that there may be scope to increase the hourly price above inflation.
- 4.7.5 Given the uniqueness of the offer, Officers may wish to hold or apply the standard inflationary increases to price pending further analysis in 2021-22.

⁵ [Tower Hamlets Council - Decision - Fees & Charges 2020-21](#)

Croquet: Key learning points

- To increase participation consider expanding and promoting the opportunities croquet available through the online booking system.
- Consider further development opportunities through further partnership working with the network of bowls clubs.

Croquet Price Recommendation

Increase in line with Inflation

4.8 Pitch & Putt (Quality of Facilities Good/Price Medium)

- 4.8.1 Our search identified five alternative providers offering pitch and putt activities. The highest charges were at the Putt in the Park franchised offer at various Council park sites within Wandsworth.
- 4.8.2 The Putt in the Park offer is somewhat removed from the standard putting green game. Course design includes single level crazy golf challenges, and a venue that caters for parties and a wide range of food and drink offers.
- 4.8.3 All providers offer a concessionary priced offer and this included rates for juniors and or seniors. Restrictions can apply for access by concessionary customers.
- 4.8.4 Rates charged at the City Corporation are generally mid-range with other providers.
- 4.8.5 Pitch and putt tends to be a fun activity undertaken by groups or with family members. As a variation to the standard admission price, the Putt in the Park sites offer a ticket for a family of up to five costing £30. Introducing a new family ticket is therefore an area for consideration.

Table 13 – Pitch and Putt Activity Charges

Pitch & Putt	Hire charges 2020-21		Discount offered 2020-21
	Adult	Concessions	
City Corporation - Queen's Park	£6.00	£3.50	40%
Alexandra Palace, Haringey	£7.50	£6.50	14%
Horsenden Hill, Footgolf Greenford	£2.90	£1.50	48%
Oakhill Pitch and Putt, Barnet	£7.00	£5.00	39%
Grovelands Park, East Barnet	£4.90	£3.90*	20%
Putt in the Park (Various sites Wandsworth)	£10.00	£8.00**	20%

* Mon-Fri only; ** U15's £8; Pensioner £7-£8

- 4.8.6 We found no evidence of season ticket prices for this activity.

- 4.8.7 Online booking was available through the Putt in the Park website. Although the facilities were closed at the time of study, we understand that the pitch and putt facilities at Alexandra Palace can be booked via the 'see tickets' feature on their website.

Pitch & Putt: Key learning points

- Pitch and putt tend to be fun activities undertaken by groups or with family members. Introducing a new family ticket is therefore an area for consideration.
- Consideration could be given to improving participation rates through further dialogue with commercial partners who exist in the market.

Pitch & Putt Price Recommendation

Price Increase Above Inflation

4.9 Swimming; The Lido (Quality High /Cost Low)

- 4.9.1 Data from seven Lidos, three unheated and four heated, were assessed from those operating in and around the London area.
- 4.9.2 Prices for lido swimming ranged from £4.45-£8.00 for heated pools and £6.85 - £8.00 for unheated pools based on an adult admission price. The highest priced day ticket £8.00 was found at Park Road Pool and Brockwell Lido. Surprisingly, we found that the cheapest admission price of £4.85 was for the heated lido at Charlton Lido and Lifestyle Club.
- 4.9.3 The benchmarking exercise has been undertaken during the Covid 19 pandemic. Many if not all of the facilities are under government restrictions and therefore the pricing and scheduling is likely to be different to normal operations.
- 4.9.4 During the Covid restrictions, all operators have had to observe strict pre-booking and timed activity sessions for swimming. The City Corporation has introduced lower activity prices for timed sessions during the Covid period. The price for day tickets was temporarily lowered to £4 (adults) and £2.40 (Concession adults). A temporary children's charge of £1.20 was also introduced. The combined family day tickets were also withdrawn.
- 4.9.5 We did not find any evidence that other providers had adopted similar temporary measures to reduce prices for general swimming.
- 4.9.6 The average general admission price from our sample was £6.57 pre Covid, at this level the City Corporation's rates are close to the top price band and therefore have limited additional headroom other than an inflationary increase. The temporary Covid rates that have been introduced however appear low compared to other providers at this time.
- 4.9.7 The City Corporation has offered early morning and late session lane swimming designed for those commuting for work so that they can enjoy a swim without crowds before and after

the working day. In contrast none of the alternate providers we came across during the Covid period, offered an early morning or late evening price for a swim.

4.9.8 To test our analysis, we carried out an archive search of websites using the Wayback Machine at <https://archive.org/web>. Hyperlinks to the details can be found at Appendix 3.

4.9.9 Based on the archive search, we found that Brockwell Lido and Park Road Pools offered an early morning option and late evening option in 2019-20 although the timings of these were different being 6am-10am and after 5pm at Brockwell and before 9am and after 6pm at Park Road Pools. The standard prices at these times were £3.20 and £3.40 at Brockwell Lido and a set £4.95 for each session at Park Road Pools. Both lidos were operated by Fusion Lifestyle. Both of these archived rates were higher than the Covid temporary rate being used by the City Corporation at this time.

4.9.10 We could find no comparable archived data on the other lido providers.

4.9.11 Summary details are provided in the table below.

Table 14 – Lido Admission Charges

Lido	Admission Price 2020-21		Discount offered 2020-21	Annual Season/Membership 2020-21		Discount offered 2020-21
	Adult	Conc.		Adult	Conc.	
City Corporation – Hampstead Heath (Pre-Covid)	£7.00	£4.50	40%	£222	£133	40%
City Corporation – Hampstead Heath (During Covid)	£4.00	£2.40 (Child 1.20)	40%	n/a	n/a	n/a
Park Road (Fusion), Haringey	£8.00	£8.00	0	n/a	n/a	n/a
Park Road (archive 2019-20)	£5.85	£4.00/£2.35*	32%/60%	n/a	n/a	n/a
London Fields (Better), Hackney	£5.20	£3.05	42%	£351.00	£275.94	30%
Brockwell Park (Fusion), Southwark	£8.00		n/a	n/a	n/a	n/a
Brockwell Park (archive 2019-20)	£6.10	£4.00	32%			
Charlton Lido (Better), Greenwich	£4.45	£2.20	50%	£351.00	n/a	n/a
Pools on the Park (Local Trust), Richmond	£5.60	£4.80	14%	n/a	n/a	n/a
Tooting Bec (Places), Wandsworth	£7.90	£4.90	38%	£336	n/a	n/a
Finchley Lido (Better), Islington	£6.85	£4.20	39%	£351	£323.46	8%

* prices applicable to holders of the Advantage+ or Advantage Card only

4.9.12 In terms of concessionary prices for general admission, five out of the seven providers in our sample offered a concessionary price. Where applied the level of discount varied from 15% up to 50%. The current discount rate at the City Corporation is 40% against the adult

rate, which is towards the midpoint of the sample. The archive search revealed that there was no over 60's price offered for an early morning swim at Brockwell Lido with swimmers paying the full adult rate. At Park Road Pools, whilst concessionary prices were available, they were reserved for Advantage + or Advantage card holder only.

- 4.9.13 Only the unheated Brockwell Lido offered the option of an annual adult season ticket. At £313 for 12 months and £107 for the six-month option, both rates were considerably more expensive than the City Corporation. Our archive search revealed that a season ticket at Brockwell has replaced the Outdoor pool voucher that offered either a 5 or 10 visit option priced at £23.90 or £47.50 respectively. A season ticket at Park Road Pools covering 10 visits was charged at £50.40.
- 4.9.14 The Parliament Hill Fields Lido has traditionally had a summer and winter season ticket split due to the unheated nature of the water. It is felt therefore that it is important to retain 2 options for all year swimming.
- 4.9.15 We found evidence of different approaches being applied by the same operator (Fusion Lifestyle) albeit in different venues, towards concessionary rates for season tickets both in the current data and historically. The archive search revealed that there was no concessionary price for the Outdoor Voucher scheme at Brockwell Lido in Lewisham, but a targeted concessionary price applicable for Advantage + card holders at Park Road Pools in Haringey.
- 4.9.16 In addition, none of the providers in our sample published specific prices for family swims or adult and child swims either currently or via the archive information we obtained. Our own direct enquiries with the operator Fusion Lifestyle, reveal that they did offer a family swim price at Brockwell Lido in 2018 (at £15.40) and indeed a family swim season ticket (at £505.00). We haven't been able to find confirmation of equivalent prices for Park Road Pools.
- 4.9.17 We understand that the family ticket was introduced several years ago in consultation with the Parliament Hill Lido User Group. The prices list for 2021-22 could be simplified if the family price were removed following our findings of other providers. We recommend however maintaining a family offer for the use of the lido in 2021-22 and reviewing how the market responds to lifting the Covid-19 restrictions during 2021.
- 4.9.18 We found that lido providers offered a membership option although only four offered a swim only option. Charges ranged from £356-£351 for an upfront annual payment and between £28-£32.50 per month for a monthly payment option. None of the sites offered a part year option.
- 4.9.19 In terms of the archive search, we found that there was no concessionary priced membership option for over 65's before 9am or after 6pm i.e. that ties in with early morning or late evening swimming at Park Road Pools and no swim only membership option at Park Road Pools.
- 4.9.20 Three sites operated by Better (GLL) provided a membership price for disabled users but not all of those sites had a concessionary membership. At Tooting Bec Lido, operated by Places Leisure, there was no distinction between the price of swim membership although this facility did offer the option of a one monthly rolling contract at £32 per month slightly higher than the annual 12 monthly priced membership.

- 4.9.21 Our search revealed that where lido facilities were contracted out to run by operators, these operators all offered bookable lane swimming sessions through their own proprietary app. Although probably related to current restrictions, we found no similar evidence for booking a sauna session online.
- 4.9.22 The sauna at the lido is only open in the winter from October to April each year. It offers winter swimmers the opportunity to have a sauna during the colder months. The sauna has helped the lido attract many more winter swimmers since it opened 5 years ago. Despite its popularity, not everyone wants to use it.
- 4.9.23 In our experience, sauna tends to be treated as a member benefit and separate sales of sauna areas are often controlled at the point of entry to ensure the safety of all users. The sauna therefore could be considered as an additional option as part of a new season ticket/monthly membership option.
- 4.9.24 When looking at the archive material, we found only that Park Road Pool offered a combined sauna and stream standard ticket at £8.55. Where sold separately we see the opportunity to increase the cost of a sauna session above the rate of inflation as the current price is unusually cheap.
- 4.9.25 In our sample there was some evidence of free swim offers being available in neighbouring boroughs for children under 5's and under 3's and for the over 60's.

Swimming; Bathing Ponds (Quality High /Cost Low)

- 4.9.26 Swimming in the Bathing Ponds on Hampstead Heath is a long-established tradition, yet it only became formally permitted at the Men's pond in the 1890's and at the Kenwood Ladies' Bathing Pond in 1926⁶. They bathing ponds have continue to attract swimmers who enjoy the health and well-being benefits that the water brings, although triathletes often frequent them too.
- 4.9.27 In recent years other open water venues have opened as open water swimming and triathlons have become more popular. As a result, in this report we have identified a number of new facilities in and around the capital where open water swimming is available.
- 4.9.28 In total 6 additional open water swimming locations were identified in 2020. In each case open water swimming has been offered through pre-booked 50-60 minutes time slots accessible online via the venue operator's website.
- 4.9.29 Pre booking of activities has been particularly important during the period of Covid-19 restrictions and is more noticeable where a venue is managed by an individual provider as opposed to other open water locations. Of the 6 locations we found, there was no evidence that the venue permitted swimmers to simply turn up and swim.

⁶ <https://guildhallhistoricalassociation.wordpress.com/2016/01/11/the-history-of-the-hampstead-heath-ponds/>

- 4.9.30 This may be because all swimmers are required to comply with the venue safety terms which in the case of 5 of the venues requires the purchase and wearing of a NOWCA⁷ safety wristband that tracks movement, logs swim times and distance and can be linked to other apps. At Beckenham Place Park, all swimmers are required to comply with the venue's own tow float safety policy.
- 4.9.31 Other open water operators such as the Royal Docks and West Reservoir are mainly catering for triathletes and open water swimmers who want to train.
- 4.9.32 The venues that use the NOWCA technology (West Reservoir, London's Royal Docks, Thames Tidal Swims; DWSC Canary Wharf and Tilgate Lake) often operate without fully trained lifeguards. Some of them use qualified first aiders in canoes for supervising and rescuing purposes. The ponds on Hampstead Heath have fully qualified lifeguards and different types of rescue/patrol craft. Working in collaboration with the other open water sites is a positive way forward and could help in understanding of any further safety measures and controls that may be available.
- 4.9.33 Of the six providers in our sample, the charge for an open water swim ranged from £5.00 - £8.00 for a timed swim session of up to 1 hour based on an adult swim. The current City Corporation rate is £4.00 for an adult which is at the low end of the benchmark.
- 4.9.34 Other than at the Bathing ponds, a concession price is offered by only 2 of the other six providers. The discount rate offered is comparable to that offered by the City Corporation of around 40%.
- 4.9.35 Only one operator offers anything other than a straightforward single admission charge per swim. Customers using Beckenham Place Park can purchase a 12 or 6-month season ticket. These are available at either £35 per month or £420 per annum. A concession rate is available at £28 per month or £360 per year, providing a 20% discount to the standard rates. Both charges are considerably higher than the current offer at Hampstead Heath Bathing Ponds with the discount rate for concessions offered by that provider also being a lot lower than that offered by the City Corporation.
- 4.9.36 Beckenham Place Park also offered, a winter season ticket of ten swims priced at £50 for adults and £35 for Juniors.
- 4.9.37 The Serpentine Lido is a commercial franchise operated in behalf of the Royal Parks. The lido is staffed with professional lifeguards and is open to the paying public 10am-6pm weekends and bank holidays in May and then all week from June to mid-September. The Lido is currently closed pending the appointment of a new operator.
- 4.9.38 The Royal Parks permit members of the Serpentine Swimming Club to use the club changing room and swim in the Lido area between 05:00 and 09:30 daily at their own risk. Members must comply with the Royal Parks rules, regulations and other requirements as may be in force. These can be viewed on Parks Notice Boards and the Royal Parks website. These also form part of the membership terms and conditions. The club is currently not accepting any new members.

⁷ [About NOWCA - NOWCA - Official website](#)

4.9.39 We found no evidence of a free swim offer available in any of the open water venues in our sample.

Table 15 – Open Water Activity Prices

Open Water Swimming	Admission Price 2020-21		Discount offered 2020-21	Annual Season/Membership 2020-21		Discount offered 2020-21
	Adult	Conc.		Adult	Conc.	
City Corporation – Hampstead Heath	£4.00	£2.40	40%	£125	£66	47%
West Reservoir Hackney	Members £5.00/ Non-members £10.50	(not found)	n/a	£351 pa (Swim Uk) or £32.50 per month plus Additional £5.00 unless home club	£275.94 pa or £25.55 per month (Seniors)	22%
London's Royal Docks	£8.00					
Beckenham Place Park*	£5.50	£3.50	36%	£420 pa or £35 per month	£336 pa or £28 per month	20%
Thames Tidal Swims	£6.00		n/a			
Tilgate Lake, Crawley **	£6.00		n/a			
DWSC Canary Wharf	£8.00		n/a			
The Serpentine Lido***	£4.80	£3.80	20%	n/a	n/a	n/a

* Opening times are seasonal

** Open from April – September only

*** normally June-Mid September (unless member of Serpentine Swimming Club)

4.9.40 There was also evidence of the need to book an online Swim Induction session as part of the registration process.

4.9.41 Many swimmers wish to swim at both the Lido and Ponds. These swimmers are made aware of the various dangers associated with open water swimming in the lido and Ponds. The membership application process can easily be adjusted to make these safety measures part of the terms and conditions. In addition, safety notices are posted at the entrance to facilities, in the changing areas and shared on social media.

Lido: Key learning points

- Providers are increasingly offering fewer pricing categories for lido swimming. The current policy of providing different rates for early morning/late evening and for family and combination tickets is not generally shared with other providers.
- Discount rates are also falling for both general admission prices and season tickets where concessions pricing is available.

Lido Price Recommendation

Lido

Consider bringing the Covid timed session price in line with the original day ticket price
Season Ticket - Price Increase Above Inflation and consider phasing
Consider introducing New Annual and One Month rolling Membership
Retain family price option

Bathing Ponds: Key learning points

- Open water swimming is growing in popularity and there are now a growing range of managed venues offering swimming.
- Customers are increasingly comfortable with pre-booking sessions and adherence to venue guidance and codes of conduct to maintain effective control on health and safety matters.
- Consideration should be given to aligning the concession discount on the Bathing Ponds Season Ticket to 40%.

Bathing Pond Price Recommendation

Bathing Ponds

Day/Session tickets - Increase by inflation
Season Ticket Price - Increase above inflation with phasing of ticket price
Align concession discount on the season ticket to 40% bringing it closer to other offers available in the market

4.10 Tennis (Quality High/Cost Low/Middle)

- 4.10.1 Tennis prices were compared against 31 identified comparable facilities. The management of tennis varies widely across the sample. A number of authorities, Newham, Haringey, Sutton, Hillingdon, Haringey and Enfield and Barnet provide free access to tennis for their residents although access times and type of facilities offered for free access are strictly defined.
- 4.10.2 We found a wide range of hourly charges applying for tennis across providers. The highest charge was £17.50 at Hyde Park whilst the lowest paid price was £6 at Tower Hamlets. At £9.25, the prices charged by the City Corporation are towards the upper midpoint of comparators.
- 4.10.3 Operators continue to apply peak and off-peak pricing options as a means of managing demand and it is not uncommon to see differential rates applied for resident and non-resident users as well as registered users, and members and non-members.
- 4.10.4 A number of providers offer online court booking functionality through dedicated websites including Will to Win (<https://willtowin.co.uk>) and Clubspark (<https://clubspark.lta.org.uk>) and Openplay (<https://openplay.co.uk>) and All Star (<https://allstaruser.sportserve.net>)
- 4.10.5 The price for a registered user cards varies widely amongst providers. Commercial operators like Will to Win offer a smartcard charge upwards of £100 for an annual registration. This entitles registered users to discount rates for court hire and to courses and programmes. Others like Trust operators including Enable Leisure, Everyone Active and Better (GLL) provide free booking access in exchange for user data.
- 4.10.6 In Hackney, the payment of annual membership fees, in this case £75 adults and £40 juniors, permits individuals to be eligible for team selection, squad training and includes all relevant match fees. Annual memberships tend to give holders advance booking rights over casual pay and play customers.
- 4.10.7 At £29.75, the charge levied by the City Corporation is towards the lower end in terms of price. We consider that this price could increase if it entitled the holder to further benefits including course and events discounts or training and selection offers.
- 4.10.8 A sample of the charges is provided in the table16:

Table 16 – Tennis Court Hire Prices

Tennis	Court Hire 2020-21		Discount offered 2020-21
	Adult	Junior	
City Corporation – Hampstead Heath and Queen's Park	£9.25	£5.50*	40%
City Corporation- West Ham Park	£7.00/£5.00 Peak/Off Peak	£5/£2.50 Peak/Off Peak	40%-50%
Waterlow Park/Kilburn Grange, Camden	£8.95	£4.75	46%
Barnet	£8.00	£2.50	69%
London Fields Hackney	£6.45	£3.15	51%
Kensington Memorial Park RB Kensington & Chelsea	£8.20	£4.30	48%
Lee Valley Hockey and Tennis Centre	£8.00 (off peak)	£6.00 (off peak)	25%
Hammersmith & Fulham (Council sites)	£11	£3.85 Schools/Youth	n/a
Chingford School of Tennis	£18 non member	£6 non member	
Wimbledon Park Merton	£9.20 (off peak)	£8.20 (off peak)	11%
Harrow	£10.35	£5.75	45%

* The City Corporation's concessionary offer covers a variety user groups including juniors.

Tennis: Key learning points

- Compared to others in the benchmark, standard hourly charges are towards the higher end of the sample for both adult and concessionary users.
- The City Corporation has continued to increase the price of its registration fee. It has risen from £16.00 in 2015-16 to its current level of £29.75 in 2020-21. The registration fee is somewhat below charges made for similar scheme elsewhere. It allows courts to be booked up to 3 days in advance. A free membership option is also available and allows the holder to book courts 24 hours in advance.
- Given the current level of charges we are cautious in recommending any increases above the standard inflationary increase at this time. There may however be an opportunity to benefit from introducing specific price points for families or through further development of the registration scheme to promote courses and activities.

Tennis Price Recommendations

Hourly court charge - Increase with Inflation
Registration fee – consider increasing prices above inflation

4.11 Tennis Courses

- 4.11.1 Tennis courses continue to remain popular and are delivered by a growing number of self-employed and accredited coaches or specialist agencies working directly or indirectly with facility operators as well as local authorities.
- 4.11.2 Due to the Covid-19 restrictions, obtaining course data for adults and juniors has been difficult. Where possible we have searched for an indication of hourly or weekly charges where these are advertised. One to one coaching rates have also been captured where available.
- 4.11.3 Providers offer a wide array of courses and programmes including sessions times ranging from short 30-minute sessions up to two hours. We have compared the rates using a simple hourly charge.
- 4.11.4 Based on 2020-21 charges, the City Corporation offers coached sessions for circa £12 per hour (current charge £59.50/5 hours) for adult and £9.50 per hour for children (current charge £47.50/5 hours).

Table 17 – Tennis Coaching Hourly Rates

Tennis Coaching	Hourly Rates	
	Adult	Junior
City Corporation – Hampstead Heath and Queen's Park	£12.00	£9.50
Hackney Downs	£10.61 (£138/13 weeks)	£8.64 £60.50 per term (7 weeks)
Will to Win Hyde Park	£14.50 £116/ 8 weeks	
Kensington Memorial Park	£12 £72/6 sessions	
Lee Valley Hockey and Tennis centre	£8 £64/8 weeks	£6.50 £52/8 weeks
Chingford School of Tennis	£10 per session	
Trailfinders Sports Club Ealing	£13.16 £79/6 weeks	
Merton (Council courts)	£15	£12.50
Islington	£13.40	£10.10
Will to Win Ealing	£10.00	£8.50 £102/12 weeks
Hammersmith & Fulham (Council sites)		£8.11 £40.55/5 hours

- 4.11.5 Compared to other providers, the rates the City Corporation are towards the upper end of the mid- range and we expect there is some additional headroom provided the quality of coaching is consider high. Junior rates are on par with others in the benchmark and as a result we consider an increase in line with inflation is acceptable.

Coaching: Key learning points

- Hourly rates charged for tennis coaching are towards the upper midpoint compared with others we found in the benchmark. Course revenue is as much driven by quality coaches and quality programmes and provided there remains confidence in the quality of the delivery we would expect an inflationary increase in prices to be generally acceptable to customers.

Coaching Price Recommendations

Increase with Inflation

5. Concessionary Charging Policy

- 5.1 The purpose of offering concessions must be to support the authority's strategic aims and priorities. Generally, the reasons for operating concessionary charges falls into one of two categories:
- to influence the level of demand for a service or;
 - to reflect the circumstances of service users.
- 5.2 It is good practice to review concessions to confirm both the level of subsidy and also their ongoing relevance.
- 5.3 In commenting on the fees and charges applied to date, we note that concessionary rates, are applied at 40% of the adult charge, except for season tickets at the Bathing Ponds.
- 5.4 Concessions apply to: under 16s, students, over 60s, those on Job Seekers Allowance, those in receipt of Universal Credit or in receipt of the Personal Independence Payment or with a Disabled Card are available.
- 5.5 At the Bathing Ponds and Lido, from summer 2020 the City Corporation has facilitated swimmers to be accompanied by a carer (with the carer entering free of charge). In addition, swimmers at the Bathing Ponds and Lido, aged under 16 and 60+, may swim for free during the morning's (7-9.30am).
- 5.6 We reviewed the concessionary pricing policy for a number of neighbouring authorities. Details are provided in the table below.
- 5.7 As charities, Hampstead Heath, Highgate Wood and Queens Park do not receive any funding through local council tax. The approach and structure of any concessionary policy is therefore likely to differ from that offered by neighbouring local authorities many of whom offer a similar range of sporting opportunities.
- 5.8 Taken together, the measures applied by the City Corporation remains comprehensive and reflects broadly similar schemes being applied across other providers in the sample. The only difference applies to recognising Council tax benefit as a pre-cursor to concessionary access.

- 5.9 In contrast to a number of other authorities, the policy at Haringey implies a more discerning approach to the application of concession with more targeted interventions directed under the Council's Advantage Card holder initiative. This is also echoed at Barnet which appears more selective on the approach it takes to young people and those aged over 60 years old.
- 5.10 In addition to concessionary rates, a number of authorities offer free or subsidised use to certain resident groups. Haringey residents aged over 65 qualify for free membership at Tottenham Green, Park Road and Broadwater Farm Leisure centres. This free access applies to gyms, swimming, racquet sports and group exercise classes, Monday to Friday between 9am-5pm.
- 5.11 In Brent holders of the standard Be Active card qualify for a 25% discount and those 60 plus or disabled holdings an Annual card qualify for a 40% discount off fees and charges.
- 5.12 In Hackney, residents and those aged under 18, over 60, disabled or a carer, can swim for free, all year round, at Britannia Leisure Centre, Clissold Leisure Centre and Kings Hall Leisure Centre.
- 5.13 In Camden, residents aged 60+ can swim for free from 7am-12pm weekdays at the leisure centres operated by the Council's leisure contractor (Better). This requires residents to complete an application process and small annual fee in exchange for a Pay and Play card.
- 5.14 In Southwark residents are currently allowed to swim and use the gym for free at all of the Council's leisure facilities at certain times of the day. We understand that the Council is currently reviewing the cost and effectiveness of the scheme.
- 5.15 Throughout this report, we have attempted to identify a number of opportunities where the particular rates for applying to concessionary use may be expanded or in some cases reduced in line with the examples seen from other providers in the market. In making these recommendations we have had regard to the need to reduce the overall costs of the service whilst at the same time providing some adjustment in pricing to accommodate the needs of more vulnerable groups.
- 5.16 The benchmarking analysis shows that many authorities continue to use varying degrees of pricing to distinguish and encourage use by specific target groups and categories of customers and that concessionary pricing is a useful tool if targeted effectively.
- 5.17 Particularly at this time when pressures are expected to increase on local government finances, it will be important to ensure that the application and design of any concessionary scheme continues to remain relevant to those audiences they are designed to attract.

Table 18 – Categories of Concessionary Users – Neighbouring Boroughs

Provider	Under 16's	Full time students / further education students	Over 60's	On Job Seekers Allowance	In receipt of Universal Credit	In receipt of the Personal Independence Payment/ Disabled Card	In receipt of Council Tax Benefit
The City Corporation	✓	✓	✓	✓	✓	✓	
Camden*		✓	✓ 55+**	✓	✓	✓ Disability living allowance	
Islington	✓	✓	✓	✓	✓	✓	?
Brent*	17 and under	✓	✓	✓	✓	✓	✓
Barnet		✓		✓	✓ Income Support/ Working Families Tax Credit	✓ Carers Allowance	✓ Housing benefit
Haringey*	✓(1)	✓(2)	✓(2)	✓(2&3) ESA/ or ETE	✓(3) Income Support/ Working Tax Credit	✓(2) Carers Allowance/ SDA/DLA/AA (includes Carer)	✓(3) Housing benefit

* Specifies residents only; ** requires joining the Better 55+ club and small annual payment

1 - Only children of parents who qualify for Choice Advantage Plus; 2 - Choice Advantage Plus; 3 - Choice Advantage

ESA - Employment and Support Allowance; ETE – Education, Training and Employment (Homelessness)

SDA -Severe Disability Allowance; DLA - Disability Living Allowance; AA - Attendance Allowance

Concessionary Policy Key Learning

- An effective concessionary policy sees concessionary rates targeted to attract specific users at reasonable rates that take into account costs and ability to pay.
- It is for this reason that concessionary rates for activities do vary widely across neighbouring authorities and why local authorities continue to fine tune their policies in line with local need.
- A well-designed concessionary scheme should target specific use by specific user groups and needs to be tracked to ensure it is having its intended impact.
- In this report we highlight where concessionary rates may be designed more effectively to encourage more people to take part in activity either as individuals or as families.
- We also found evidence where neighbouring authorities are continuing to refine their approach to concessions by applying more targeted interventions to encourage participation from certain groups. This may be an approach which the City Corporation may wish consider to ensure its own concessionary policy continues to remain relevant and appropriate.

6. Conclusion

6.1 A review of prices and the approach to fees and charging policy has been undertaken that involved benchmarking with a number of neighbouring boroughs and with facilities considered similar in nature to the those available at Hampstead Heath, Highgate Wood and Queen's Park.

6.2 The overall quality of services and facilities has been considered to remain good and where the mix of price/quality has been disconnected, a number of opportunities to increase participation and revenue as well as a series of improvements to existing systems and approaches have been suggested.

Current benchmarking has demonstrated that existing prices are still, in some areas lower than the comparators with a number of recommendations suggesting the need to raise prices above the level of inflation to align with others in the benchmark.

6.3 In recognising the need to balance both financial and social objectives, the report includes a number of opportunities to extend and refine the current approach to concessionary pricing to ensure it remains relevant.

6.4 The report provides an up-to-date assessment of the current range of fees and charges levied by a range of comparators and set against a backdrop of continuing challenges in local authority budgets, outsourcing and partnership working and the development of mobile booking and e-marketing infrastructure to support service delivery.

6.5 A series of recommendations are set out at Table 1 for consideration.

Appendix 1 - Competitor Prices (provided as a separate excel document)

Appendix 2 - Third Party Providers

Offering online pitch bookings

The London Playing Fields Foundation – www.lpff.org.uk

Openplay - www.openplay.co.uk

Playfinder – www.playfinder.com/london

PlayFootball - www.playfootball.net

Enfield Council – <https://book.enfield.gov.uk/Sports.Live/>

Operators offering on-line booking options for athletics, swimming and tennis

Fusion Lifestyle; www.fusion-lifestyle.com

Better (GLL); <https://better.org.uk>

Places for People; <https://www.placesleisure.org>

Everyone Active; www.everyoneactive.com

Enable – <https://online.enablelc.org>

Will to Win (<https://willtowin.co.uk>)

Clubspark (<https://clubspark.lta.org.uk>)

All Star (<https://allstaruser.sportserve.net>)

LBRUT – www.richmond.gov.uk

Hackney Tennis – <https://hackneytennis.co.uk>

Temple Fortune Club – tennis <https://servingwinners.co.uk>

Lee Valley <https://www.visitleevalley.org.uk>

[Open water – NOWCA - About NOWCA - NOWCA - Official website](#)

Pitch and Putt

<https://puttinthepark.com/>

Athletics

Norman Park Athletics track <https://nptm.co.uk>

Leisure Management Software Providers

Legend - <https://www.legendware.co.uk>

Gladstone - <https://www.gladstonesoftware.co.uk>

Appendix 3 – Archive Search using <https://archive.org/web>

Brockwell Lido

<https://web.archive.org/web/20190502105315/https://www.fusion-lifestyle.com/centres/brockwell-lido/memberships/price-list/>

Park Road Pools

[Price List - Park Road Pools & Fitness \(archive.org\)](#)

The Serpentine Lido - Prices and Opening -

<https://web.archive.org/web/20140702163444/http://www.royalparks.org.uk/parks/hyde-park/sport-in-hyde-park/serpentine-lido>

The Serpentine Lido - Swimming Club

<https://web.archive.org/web/20201028172957/http://serpenteswimmingclub.com/about-the-club>

Summary of Search - Lidos

Park Road (Fusion)	Captured data
London Fields (Better)	Not found last archive date GLL 2016
Brockwell Park (Fusion)	Captured data
Charlton Lido (Better)	Not found last archive date GLL 2016
Pools on the Park (Local Trust), Richmond	Not found
Tooting Bec (Places)	Information on South London Swimming Club Membership fees only
Finchley Lido (Better)	Not found last archive date GLL 2016
The Serpentine Lido	Captured data

Disclaimer

Although the information in this report has been prepared in good faith, with the best intentions, on the basis of professional research and information made available to us at the time of the study, it is not possible to guarantee the financial estimates or forecasts contained within this report.

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