SPEEDWAY AND STOCK CAR NEEDS ASSESSMENT
TO ACCOMPANY AN OUTLINE PLANNING APPLICATION FOR

DEMOLITION OF EXISTING BUILDINGS AND OUTLINE PLANNING APPLICATION FOR RESIDENTIAL DEVELOPMENT OF UP TO 137 DWELLINGS (USE CLASS C3) INCLUDING MEANS OF ACCESS INTO THE SITE FROM THE RUGBY ROAD (NOT INTERNAL ROADS), NEW OPEN SPACE AND ASSOCIATED INFRASTRUCTURE. ALL OTHER MATTERS RELATING TO APPEARANCE, LANDSCAPE, LAYOUT AND SCALE RESERVED.

AT COVENTRY STADIUM, RUGBY ROAD, BRANDON

ON BEHALF OF
BRANDON ESTATES LIMITED

OCTOBER 2018
OUR REF: PF/9189

Contents

Appendices

1.0 INTRODUCTION

1.1 Framptons have submitted a planning application for residential development at the Coventry Stadium.

1.2 This statement is a needs assessment for speedway and stock car racing and should be read in conjunction with the Financial Statement and Financial Statement NTS prepared by Turley as part of the planning application submission ('the Turley Assessment').

1.3 This report supports the planning application submission and seeks to make the case that Coventry Stadium is surplus to requirements in line with National Planning Policy (NPPF).

Planning Policy Context

1.4 The assessment has been produced in line with the National Planning Policy Guidance (NPPF) 2018, which requires that (Paragraph 96, page 28):

> *'………planning policies are based upon robust and up-to-date assessments of the need for open space, sport and recreation facilities (including quantative or qualatative deficits or surpluses) and opportunities for new provision."*

1.5 Furthermore Paragraph 97 states that existing open space, sports and recreational buildings and land, including playing fields, should not be built on unless:

- An assessment has been undertaken which has already clearly shown the open space, buildings or land to be surplus to requirements; or
- The loss resulting from the proposed development would be replaced by equivalent or better provision in terms of quantity and quality in a suitable location; or
- The development is for alternative sports and recreational provision, the benefits of which clearly outweigh the loss of the current or former use.

1.6 Sport England published two new methodologies in 2013 for how NPPF compliant needs assessment work should be undertaken:

- The Assessing Needs and Opportunities Guide (ANOG)
- The Playing Pitch Strategy methodology (PPS)

1.7 The ANOG methodology is used to assess the need for outdoor / indoor / built facility provision (not including pitch sports) and has therefore been used for this assessment.

1.8 Essentially these methodologies form the new 'how to do' needs assessments for indoor / outdoor sport and pitch sports in England and represent Sport England's response to the NPPF.

1.9 Rugby Borough Council has a Sport Facilities and Playing Pitch Strategy (2011) and Open Space, Playing Pitch and Sport Facilities Study (2015) neither of which includes speedway or stock car racing in its scope.

1.10 Speedway and stock car racing does not however operate on the basis of Council boundaries. It has been assumed that the primary catchment area for speedway and stock car racing is a 60-minute driving catchment is a reasonable travel time to a stadium. There are no confirmed drive times for speedway or stock car racing and the 60-minute driving catchment is an assumption only based on the fact that speedway racing for the Coventry Bees is currently held in Leicester an approximately 35-45 minute drive from Coventry Stadium and stock car racing for Coventry Stox was most recently held at Stoke Stadium an approximate 1.25 – 1.35 drive from the stadium. Therefore, in undertaking an analysis of need it is more relevant to consider catchment areas as opposed to local authority boundaries.

1.11 Sport England has a statutory responsibility for planning applications involving sports provision. The needs assessment therefore considers supply and demand, consultation and utilises Sport England planning tools in arriving at the assessment.

1.12 This assessment therefore sets out the case (under paragraph 97 (A) of the NPPF) that the site is surplus and there is adequate speedway and stock car provision in the area.

Assessing Needs and Opportunities Guide - ANOG

1.13 Assessing Needs and Opportunities Guide (ANOG) has been developed by Sport England and sets out an approach to undertaking needs assessment for sport and recreation facilities, in order to be compliant with the NPPF. The approach adopted to develop this needs assessment has utilised the process set out in the ANOG guide.

1.14 The first element of ANOG seeks to tailor the approach to reflect the geographical and sporting nature of the local area. In this context, as set out, the assessment looks at catchment areas around Coventry Stadium as opposed to Council boundaries.

1.15 ANOG also stresses the need to consider strategic issues. The work has therefore considered the strategic context and stock car and speedway participation profiles across the area, looked at supply and demand of stock car and speedway facilities in terms of quantity, quality, access and availability, and utilised Sport England planning tools to develop the needs assessment evidence base and subsequent conclusions.

Coventry Stadium

1.16 As set out in the previously submitted Turley Assessment, the subject premises comprises a disused greyhound racing and speedway / stock car motor racing circuit together with grandstand, which provided visitor viewing and dining facilities, ancillary buildings and a substantial area of car parking (part-gravel and part hardstanding).

1.17 Prior to the closure and substantial damage, the subject premises previously operated as the Coventry (or Brandon) Stadium ('the Stadium'). The speedway track had a length of 300m and was surrounded by the greyhound track which was 400m in length.

1.18 The track was surrounded by viewing platforms on each site. The open grandstand provided part covered standing accommodation, toilet facilities and a bar. The main grandstand provided seating areas, a covered dining area and toilets.

1.19 Other buildings on site included storage areas, dog kennels, a shop, laundry room, offices and first aid room. Various smaller buildings housed a score board and food outlets.

1.20 A large car park fronts the stadium consisting of gravel and tarmacked areas. The site is presently secured by barriers and gates.

1.21 The subject site and premises are not currently operational and have not been in operation since late 2016.

1.22 Before closure the subject premises functioned as a motorsport stadium with associated supporting facilities including restaurant and leisure space. The lawful use class remains Sui Generis.

Recent Planning Activity

1.23 In 2004 a masterplan for the redevelopment of the stadium was established by the owners which set out four phases of development as follows:

Phase 1: Implement dog racing infrastructure to raise the track to International Dog Racing Standards and provide a 230-seat restaurant.

Phase 2: Provision of a conference facility

Phase 3: Facilitation of a 250 stall Sunday Market within the car park

Phase 4: Construction of a sports club

1.24 Review of the planning records available on the Council's website confirms that numerous permissions were sought for the improvement of the stadium facilities in line with the redevelopment plan. These include three applications for hosting a regular market within the car parking area (R95/0874/6592/P; R03/0677/6592/P; R07/1268/PLN); three applications relating to the extension of the restaurant area (R04/5228/6592/B; R04/5675/6592/B; R4/6031/6592/B); and two applications for the development of a mixed-use restaurant, retail and conference space (R04/0822/06592/OP; R04/1252/6592/P). The majority of applications were refused and the remainder were withdrawn. This demonstrates that there were various attempts in the past to make the stadium use more viable however the various uses proposed do not appear to have been acceptable in planning terms.

Structure

1.25 The remainder of the report is set out as follows:

- Section 2: Strategic Context and Consultation
- Section 3: Supply Analysis
- Section 4: Demand Analysis
- Section 5: Conclusions and Recommendations

2.0 STRATEGIC CONTEXT AND CONSULTATION

2.1 ANOG states that all needs assessment work should ultimately seek to reflect and support the delivery of the relevant planning, sport and strategic policy priorities. The requirement for the needs assessment work to be compliant with the policy framework is therefore critically important. There needs to be a 'golden thread' to demonstrate how facility priorities or development proposals connect and contribute to the relevant policy framework. Needs assessment and ultimately planning decisions should not therefore be viewed in isolation.

Historical Context

2.2 Coventry Stadium was opened in 1928 and was first used for speedway racing.

2.3 It was historically owned and operated by the Sanderson family (as the majority owners) and Charles Ochiltree (who had a minority share). On acquisition of the Lythalls Lane Stadium, within Coventry, and the Leicester Stadium, the owners formed Midland Sports and Stadia Ltd which operated all three grounds.

2.4 Coventry Stadium has historically hosted a variety of motorsports including midget car racing. The stadium briefly closed during the Second World War and was operated as a workshop by aircraft companies.

2.5 The stadium was sold to Mr Avtar Sandhu in 2003, along with the promotional rights to hold speedway and stock car racing events at the venue.

2.6 In its recent history the stadium became known for holding speedway racing, stock car/bangers and, until February 2014, greyhound racing – following which the GBGB revoked the stadium's license for holding greyhound racing events. The Coventry Telegraph article dated 27 February 2014 confirms that:

> *"The governing body cited the financial performance of the venue as the reason for stripping the track of its licence, pointing to the company's accounts which showed a loss of over £511,000 during the past two financial years.*
>
> *In a letter to organisers, seen by the Telegraph, the GBGB said: "The fact you indicated you were closing does mean you relinquish your GBGB licence.*
>
> *"Your proposal to try and rectify this by announcing that you now intend to remain open subject to financial intervention by other parties is not acceptable.*
>
> *"The regulatory process cannot work and revolve around the uncertainty generated within the industry by your own actions."*

2.7 The Stadium was then sold to Investin Brandon Ltd in 2015 and transferred to Brandon Estates Ltd.

Speedway

2.8 Speedway racing was held at Coventry Stadium from 28th September 1928 (to closure), since the inaugural meeting of the former Coventry City Speedway team, only ceasing during the stadium's use as a workshop in the Second World War.

Coventry Bees

2.9 Following its closure during the Second World War, the stadium reopened on 1st May 1948. The Coventry Bees speedway team was also formed within this year and raced at Coventry Stadium until 2016.

2.10 The promotion of speedway at the stadium, and management of the Coventry Bees, was undertaken by Charles Ochiltree until his death in 1998 when promoting duties passed to his son. Promotion rights and the ownership of the Coventry Bees transferred to Mr Avtar Sandhu in 2003 following his purchase of the stadium. The Coventry Bees and promotional rights for speedway racing were subsequently acquired by local business man Michael Horton in September 2011.

2.11 Since the Coventry Bees formation, they have won 28 championship titles as follows:

- Elite League Champions – 2005, 2007, 2010
- British League Champions - 1968, 1978, 1979, 1987, 1988 (The British League was the forerunner to the Elite League)
- Elite League Knockout Cup Winners - 2006, 2007
- British League Knockout Cup Winners – 1967
- National League Division Two Champions – 1953
- League Cup - 1981, 1985, 1987
- Elite League Pairs Championship - 2008, 2010
- Midland Cup - 1952, 1960, 1966, 1969, 1971, 1976, 1977, 1978, 1979, 1981, 1982

Stock Car Racing

2.12 Stock Car racing was brought to the UK in 1954, with the first race being held at New Cross Stadium in London and with a first meeting being held at Coventry Stadium that same year. The form of racing quickly gained popularity.

2.13 BriSCA F1 racing began at Coventry Stadium in 1958 and ran the first Saturday of every month April-November until 2016. In 1960 the BriSCA F1 World Championship was first held at the stadium; and since then it has hosted a number of championship events as follows:

- World Championship - 1960, 1964, 1968, 1971, 1974, 1977, 1980, 1983, 1986, 1989, 1993, 1996, 1998, 1999, 2000, 2002, 2003, 2004, 2006, 2010, 2014
- British Championship - 1961, 1965, 1969, 1992, 1995, 1996, 1998, 1999, 2001, 2002, 2008, 2012
- Grand National Championship - 1973, 1998, 2006, 2011

- Trust Fund - 1981, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011
- World of Shale Championship - 2011, 2012, 2013

2.14 The promotion of BriSCA F1 racing was historically undertaken by the Ochiltree family until the sale of the stadium and promotional rights to Coventry Stadium Limited in 2003. Stock car racing was promoted by Mr Avtar Sandhu, director of Coventry Stadium Limited under the name Coventry Stox, via way of a lease granted to Coventry Racing Club Limited, until the end of the 2016 racing season.

2.15 In the UK, the sport is managed by British Stock Car Association (BriSCA) which consists of a board of 6 permanent promoters, one of which acts as Chairman. BriSCA collaborates with the British Stock Car Drivers Association (BSDCA) to form the BriSCA Management Board (BMB) which acts as the governing body for the sport.

2.16 All venues that stage BriSCA F1 Racing have to be licensed by and meet the requirements of BriSCA. All drivers wishing to race at a BriSCA Formula One licensed meeting have to be registered in advance by the BSCDA, acting as agents for BriSCA, in order to comply with insurance arrangements. BriSCA provides annual updates to regulations relating to car and track specifications, race procedures and all other aspects of the sport.

Greyhound Racing

2.17 The first greyhound racing meeting at Coventry Stadium took place on 19 September 1978 and facilities included a restaurant, a modern computerised tote and bars.

2.18 A history of closures and reopening of greyhound racing followed until Coventry Dogs Limited, which held a lease granting rights to hold racing events at the stadium, had its license revoked by the GBGB in February 2014 due to incurring significant financial losses over consecutive years. The company was subsequently dissolved in December 2015.

2.19 It is understood that independent racing events were held during 2014 and 2015, albeit further details have not been made available.

2.20 Ultimately the stadium ceased operations in November 2016 and has remained closed since.

2.21 In short, the changes in the sport (led by declining patronage) have rendered the volume of stadium operations as financially unviable, which has led to a consolidation in a smaller number of venues (including greater propensity for multiple teams and events to share venues to seek to cover costs and optimise revenues).

2.22 Also, of note, in order to share the operational costs, it is common that stock car race grounds are used for other sports including speedway and greyhound racing. The use of these stadiums could help sustain the sport and provide additional revenue for other stadiums in danger of closing.

2.23 As the greyhound use on the site finished over 4 years ago, greyhound need is not considered further in this report.

Trends

UK Speedway

2.24 The National Speedway Stadium was opened in 2016 in Gorton, Manchester, and serves as the national purpose-built speedway stadium. It is home to the Belle Vue Aces speedway team.

2.25 Historically major speedway events in the UK were held at Wembley Stadium, although since 2001 Cardiff's Millennium Stadium has hosted a yearly British Grand Prix which now attracts crowds of between 40,000 and 45,000. Prior to the Millennium Stadium, the Grand Prix was held in Hackney, Bradford and Coventry in the mid to late 1990s.

2.26 Stadia used for Premiership and Championship speedway divisions have capacities ranging from 1,000 up to 6,000 and, in order to meet operational costs, most grounds are also used for other sports, in particular stock car racing and greyhound racing.

2.27 The quality of speedway stadia in the UK is generally poor, which a major reason for the limited number of FIM international events other than the British Grand Prix which are hosted in the UK.

2.28 Up to date information relating to speedway attendances for either domestic or international events is difficult to obtain on a reliable and consistent basis, with no figures published by the ACU, BSPA and SCB.

2.29 Based on engagement with operators, it is understood that average attendances for the Premiership vary from less than 1,000 up to 2,500 per event, although major meetings and the end of season play offs can attract 'one off' crowds of up to 5,000.

UK Stock Cars

Stadia & Attendance

2.30 Based on review of the BriSCA fixture list there were approximately 10 UK stadiums that held BriSCAF1 racing in 2017. Each stadium holds a varying number of meetings and fixtures throughout the season. There is no principal national stadium for the sport. The major championship events are held at varying stadiums determined through a bidding process undertaken by each stadium's Stock Car promoter.

2.31 There are over 60 stadiums which have ceased to hold BriSCA F1 racing due to decline in popularity, stadium closure and failure to meet track standards.

2.32 In order to share the operational costs, it is common that stock car race grounds are used for other sports including speedway and greyhound racing.

Decline of Greyhound, Speedway & Stock Car Stadia

2.33 The challenges and general decline in the sector has led to a substantial number of closures of stadia nationally, with financial difficulties in the face of falling attendances and revenues of the primary driver cited**.**

2.34 Several recent notable examples are summarised.

Wimbledon Stadium, Plough Lane, Wimbledon

2.35 Wimbledon Stadium opened on 19 May 1928. It operated as a greyhound racing track and also hosted motor racing events. The stadium closed in March 2017.

2.36 Until 2005 the stadium hosted speedway events and, for circa 50 years, was home to the Wimbledon Dons speedway team (now defunct). It is understood that the team disbanded due to financial difficulties, which were exacerbated by an inability to meet the increased rental cost within lease terms proposed by the stadium's owners.

2.37 The stadium also hosted stock car and other small circuit motor racing events from 1962 until circa 2008. Motor racing events were promoted by Speedworth International and included Superstox, Stock Cars, Hot Rods and Bangers. The stadium hosted its own stock car racing teams for short periods in 1966 (London Sparrows) and 1971–72 (Canaries/Dons).

2.38 In 2007 the stadium was acquired by Galliard Homes Limited following it being put up for sale by the former owners. A joint planning application made by Galliard Homes and AFC Wimbledon to build 600 apartments on the site and a new 11,000 seater football stadium, which will be the new home of AFC Wimbledon football club.

2.39 In December 2015 the London Borough of Merton granted planning permission.

Hall Green Stadium, York Road, Hall Green, Birmingham

2.40 The Hall Green Stadium was opened on 24 August 1927 and was Birmingham's first greyhound track. The stadium closed in July 2017.

2.41 Hall Green Stadium was sold by the National Asset Management Agency (parent company of the Greyhound Racing Association – 'GRA') to Euro Property Investments Limited in 2014. A lease agreement was retained to permit the continued operation of the stadium.

2.42 In February 2016 the owners confirmed that the stadium was to be closed down following discussions with the GRA. The GRA had confirmed that there was no longer enough market demand for two dog tracks in Birmingham. In a meeting held with Birmingham City Council (BCC), the GRA stipulated that they wished to invest in and focus on ensuring the continuing viable operation of greyhound racing at Perry Barr Stadium, which is located approximately 8 miles north of Hall Green Stadium.

3.0 SUPPLY ANALYSIS

3.1 The supply of speedway and stock car facilities and tracks is based on a desk top search of facilities.

3.2 The following speedway and stock car facilities are identified within a 60-minute driving catchment of Coventry Stadium.

Table 3.1 Speedway Stadium

Site Name	Range (in minutes)	Ownership/ Management	Year Built	Local Authority	Other/ Comments
Beaumont Park, 1 the Lions, Leicester	30	Commercial	2011 (track)	Leicester City Council	Can use stadium every day. No restrictions on use.
Perry Barr Stadium, Birmingham	45	Commercial	1929	Birmingham City Council	Speedway shale track 292m. Also stock car and dog track.
Ladbroke Stadium, Monmore Green, Wolverhampton	60	Commercial	1928	Wolverhampton City Council	Speedway Track is 264m. Also, dog track.

Table 3.2 Stock Car Stadium

Site Name	Range (in minutes)	Ownership/Management	Year Built	Local Authority	Other/Comments
Perry Barr Stadium, Aldridge Road, Birmingham B42 2ET	45	Commercial	1929	Birmingham City Council	Speedway Stock Car and dog track
Birmingham Wheels Raceway, Adderley Road South, B8 1AD	48	Commercial		Birmingham City Council	330m tarmac service. Also a kart circuit. Past use as speedway.
Northampton, Northampton International Raceway, Barfield on the	48	Commercial	1949	South Northampton-shire District Council	The tarmac track is 396m. Past use as speedway.

Green, NN7 2BA					
Hednesford Hills Raceway, Hednesford, Cannock	60	Commercial	1954	Cannock Chase District Council	

3.3 There are 3 speedway stadiums with within a 60-minute driving catchment of Coventry Stadium, and 4 stock car stadiums with a 60-minute driving catchment.

Relative supply

3.4 Relative provision of stock car and speedway facilities regionally is set out below.

3.5 It should be emphasised that this assessment only comprises existing supply; relative provision of stock car and speedway stadiums is a useful indicator of the volume of provision available to prospective patron but is only a benchmark against which to judge supply. This section makes no comments at this stage on the local (or wider) demand for such stadiums, which is dealt with later within this assessment.

Table 3.3

Speedway Stadiums

Region	**Stadiums***	**Mid year Population Estimate 2017****	**Stadium Per Population**
South East	5	9,080,825	1 per 1,816,165
London	0	8,825,001	0
North West	2	7,258,627	1 per 3,629,313
East	6	6,168,432	1 per 1,028,027
West Midlands	**4**	**5,860,706**	**1 per 1,465,176**
South West	5	5,559,316	1 per 1,111,863
Yorkshire & the Humber	2	5,450,130	1 per 2,725,065
East Midlands	4	4,771,666	1 per 1,192,916
North East	2	2,644,727	1 per 1,322,363

****taken from Statista (2018) (The Statistics Portal, Mid-year Population Estimate 2017 by Region**
***List of stadiums taken from the Speedway Plus website**

Table 3.4

Stock Car Stadiums*

Region	Stadiums*	Mid year Population Estimate 2017**	Stadium Per Population
South East	2	9,080,825	1 per 4,540,412
London	0	8,825,001	0
North West	1	7,258,627	1 per 7,258,627
East	4	6,168,432	1 per 1,542,108
West Midlands	**4**	**5,860,706**	**1 per 1,465,176**
South West	3	5,559,316	1 per 1,853,105
Yorkshire & the Humber	1	5,450,130	1 per 5,450,130
East Midlands	3	4,771,666	1 per 1,590.555
North East	1	2,644,727	1 per 2,644,727

***Brisca F1 stock car stadiums taken from the Brisca F1 and F2, V8 Hotstox and Spedeworth Incarace fixture list.**
****taken from Statista (2018) (The Statistics Portal, Mid-year Population Estimate 2017 by Region**

Overview of quantity

3.6 As suggested above, relative supply is only a useful indicator in terms of benchmarking local provision alongside other similar areas. As can be seen from the table 3.3 above, Speedway provision for the West Midlands region is relatively good compared to other regions (in 4th place in the region). With regards to stock car provision in the West Midlands is the best compared to other regions (1st). Therefore, residents in the West Midlands regions have a relatively good access to speedway and stock car tracks.

3.7 Furthermore, there is a range of alternative venues within easy reach (0-60minutes drive) of Coventry as seen in stadium Tables 3.1 and 3.2.

Quality

3.8 When assessing quality, it is necessary to review both condition and fitness for purpose.

3.9 Data on age/refurbishment can be used to inform quality, but in the case of speedway and stock car racing this is not a valid proxy, and in any case details of refurbishment are either not collected or publicly available.

3.10 As stated in the Turley Assessment, and predicated on detailed condition analysis conducted by an RICS qualified Chartered Surveying firm, the Coventry Stadium is in poor state of disrepair, which would presently preclude operations without very significant investment in extensive remedial works.

Accessibility

3.11 Given the amount and distribution of various types of facilities, all residents within Rugby could access at least one facility within a 1-hour drive time by car. It is noted that many of the spectators would drive to the stadium particularly as races were held at weekend and in the evening i.e. at time when public transport such as accessibility by bus would be more limited.

Availability

3.12 Availability needs to consider the following (see ANOG):

- how much existing stadium are actually used, how full they are
- how much they could be used
- what scope is there for increasing their availability

3.13 These are in turn influenced by a number of factors, including:

- the management and ownership e.g. whether facilities are public, private or education based
- a programming and sports development policy e.g. is availability given over to specific sports, initiatives and range of activities at certain times. Some facilities may be programmed only for specific sports, users or activities
- the cost of use e.g. a high cost may result in a facility having very little use
- patterns of use e.g. a popular facility that is always full, a facility that is heavily used but only for a limited period across the week, is the nature of use changing over time?
- hours of use e.g. opening times available for public use, this will be linked to the programming policies above
- facility design e.g. the physical design and layout of a facility may limit or prevent use by specific users.

3.14 It has not been possible to ascertain the precise availability of all stadiums in the area. No detailed data on availability has been researched because of the commercial nature of such information. However, it does appear that multiple uses of stadiums is beneficial to stadiums to ensure their long term viability. This suggests that a stadium may welcome using any spare capacity they have to help ensure the long-term future of their stadiums and clubs.

3.15 In summary:

- speedway provision for the West Midlands region is relatively good compared to other regions (in 4th place in the region);
- stock car provision in the West Midlands is the best compared to other regions (1st).
- therefore, residents in the West Midlands regions have a relatively good access to speedway and stock car tracks.
- there is a range of alternative venues within easy reach (0-60 minutes' drive time)

- multiple uses of stadiums is beneficial to stadiums to ensure their long term viability. This suggests that an existing stadium may welcome using any spare capacity they have to ensure the long-term future of their stadiums and clubs.

4.0 DEMAND ANALYSIS

4.1 To understand future needs ANOG considers it is also important to consider demand, which is explored in this section.

4.2 Demand for any sport including speedway and stock car racing is affected by a number of factors:

- The characteristics of the local area and the propensity of the population to take part in the sport
- The changing demographics and latent demand
- Initiatives by the governing bodies, to promote additional participation

Population

4.3 The following information was derived from the Rugby Borough Council 'Authority Monitoring Report', December, 2015. It only refers to the Borough area itself – additional research is required to estimate the situation in the wider Coventry Stadium catchment, we have therefore looked at RBC's population as a guide:

- The Borough's overall population remained steady between 1980-2001 but between 2001-2011 the population increased significantly by 14.8% (Nomis, 2015).
- The rise in population was largely due to people migrating into the area and more single parent families, but also as a result of increased birth rate and people living longer.
- The projected population increase between 2010 and 2035 is expected to be 30%, which would bring the population to in excess of 130,000.
- Across Warwickshire as a whole, the highest rates of projected population growth are in the groups aged 65 and over. The eldest age group (those aged 85 and over) is projected to increase by over 190% by 2035. It is noted that population growth is forecast to be driven by an increase in the elderly population, rather than younger cohorts, which traditionally are greater users of sports facilities and have greater disposable incomes to spend on attending events.
- The average household size within the Borough of Rugby is 2.4 persons. The number of households has risen faster than the population, which is partly due to over a quarter (28.1%) of Rugby's households being occupied by a single person.
- The 2011 Census shows that around 12% of Rugby Borough's residents were born outside the UK. 5.9% being from Europe, 1.9% Africa, 2.6% Asia, and 1.2% from the Rest of the World. In terms of ethnicity, nearly 16% of Rugby's population belong to groups other than White British. These include Asian Indian (3.1%), Black African (1.0%), White Irish (1%), Asian Other (1%) and White Other (5.2%) groups.
- Rugby's average household incomes are however higher than that for the West Midlands region and also above national levels.
- In the Indices of Multiple Deprivation 2015, Rugby is ranked 240 out of 326 Local Authorities (no.1 being most deprived, 326 the least). At a county level, the Indices show that Warwickshire is ranked 124th out of 152 upper tier authorities in England meaning that it is amongst the 20% least deprived areas in England.

Population Projections

4.4 Rugby's projected population increase between 2010 and 2035 is expected to be 30%, which would bring the population to in excess of 130,000.

4.5 The projected increase in population of 30% (albeit trend projected and despite the long-time span) suggests that demand for sport facilities in general will increase.

Market segments (MS)

4.6 As part of its research work, Sport England has developed 19 market segments within the overall adult population to help understand the nation's attitudes towards sport and its motivation for taking part (or not). It is based on the Active People's Survey, DCMS's 'Taking Part' Survey and Mosaic data from Experian.

4.7 Sport England's methodology has been used as no other published research been undertaken for speedway or stock car use and there is no other known methodology. There is however limitations to the Sport England methodology as it relates to participants rather than spectators.

4.8 In terms of current participation in sport, it is possible to highlight the characteristics of the local population within a 30km (18 mile) catchment of Coventry Stadium site. The illustrations below all demonstrate the five main market segments in the 30 km area are as follows:

- Philip – known as a 'comfortable midlife male'. Philip can be considered a 'sporty' segment, with above average levels of sports participation. Half of this segment has done no sport in the past four weeks, compared with the average of 60% of all adults. The proportion of this segment playing sport at least once a week is 11 percentage points above the national average, and almost a fifth have undertaken three sessions of sport a week, compared with a national average of 15%.
- Tim – known as a 'settling down male'. Tim is an active type that takes part in sport on a regular basis: almost two thirds take part in sport at least once a week, compared with 40% of all adults. 27% of this segment does three 30-minute sessions of moderate intensity sport per week, compared to 15% of all adults. Only 37% have done no sport in the past month.
- Elsie and Arnold – 'Retirement Home Singles' Elsie & Arnold have very low participation in sport 82% have done no sport in the past four weeks, compared with the average of 60% of all adults. 17% have participated in sport at least once a week, which is consistent with other segments of that age (the average of segments 17 to 19 is 12%). A very small proportion have undertaken three sessions of sport a week (5%), compared with 11% of the over 66 age group.
- Roger and Joy – 'early retirement couples'. Roger & Joy have below average levels of sports participation. 66% of this segment have done no sport in the past four weeks, compared with 60% of all adults. 38% have participated in sport at least once a week, which is consistent with other segments of the same age. 10% have undertaken three sessions of sport a week, compared with a national average of 15%.

- Elaine – 'Empty Nest Career Ladies' - Elaine has average levels of sports participation. 62% of this segment have done no sport in the past four weeks, compared with the average of 60% of all adults. 43% have participated in sport at least once a week, which is higher than the national average. 12% have undertaken three sessions of sport a week, compared with a national average of 15%.

Image 4.1 Dominant Market Segment by Population

Please refer to Appendix 1

Image 4.2 Population of all Segments within Catchment Area

Segment	Catchment Pop.	LA Pop.	CSP Pop.	Rgn Pop.	Nat Pop.	Catchment	LA %	CSP %	Rgn %	Nat %
Ben	51792	3478	39905	172331	1989287	4.6	4.9	4.9	4.1	4.9
Jamie	53125	2627	39578	224031	2162891	4.8	3.7	4.8	5.3	5.4
Chloe	47425	3292	38093	158994	1896625	4.3	4.6	4.7	3.8	4.7
Leanne	42044	2124	30591	178578	1711607	3.8	3	3.7	4.3	4.3
Helena	48258	3246	38493	170239	1829866	4.3	4.6	4.7	4.1	4.5
Tim	96711	7237	72968	312880	3554150	8.7	10.2	8.9	7.4	8.8
Alison	47255	3703	33062	143215	1766560	4.2	5.2	4	3.4	4.4
Jackie	59470	3580	39549	200719	1965002	5.3	5.1	4.8	4.8	4.9
Kev	63438	2833	44083	293686	2386568	5.7	4	5.4	7	5.9
Paula	40672	1635	27007	195439	1507276	3.6	2.3	3.3	4.7	3.7
Philip	108372	7253	77927	363846	3480166	9.7	10.2	9.5	8.7	8.6
Elaine	71537	4965	54794	250831	2444113	6.4	7	6.7	6	6.1
Roger & Joy	78742	6362	57984	271389	2723835	7.1	9	7.1	6.5	6.8
Brenda	54141	2435	36862	247196	1976776	4.9	3.4	4.5	5.9	4.9
Terry	41871	2028	29153	194265	1484513	3.8	2.9	3.6	4.6	3.7
Norma	21711	978	15198	101707	854962	1.9	1.4	1.9	2.4	2.1
Ralph & Phyllis	43605	3472	39198	160573	1700496	3.9	4.9	4.8	3.8	4.2
Frank	50386	3731	36132	183961	1612960	4.5	5.3	4.4	4.4	4
Elsie & Arnold	94356	5904	67401	377460	3206387	8.5	8.3	8.2	9	8
Total	1114911	70883	817978	4201340	40254040	100	100	99.9	100.2	99.9

Participation in Motorsports

4.9 In terms of people within the catchment area who participate in motorsports, the percentage of population participating in the 30 km catchment in motorsports (including go karting, motor racing, motorcycling, rallying and speedway) is 0.1 – 1.0% and this is spread evenly across the whole area. This compares for example to The MS data for the catchment area estimates that total participation in motorsports is 2675 adult participants.

Image 4.3 Percentage of Population Participating on Motor Sport

Please refer to Appendix 2

4.10 Sport England have not researched the participation for speedway of stock car racing individually but as a group under the header 'motorsports' which as stated above includes go karting, motor racing, motorcycling, rallying and speedway. In the catchment area, the participant levels for motorsports are the same as other 'sport groups' researched by Sport

England including: martial arts/combat sports; other water sports (excluding swimming, sailing, angling); rollersports; and winter sports– all 0.1 to 1.0 %. Notably the participation for the keep fit and gym group is 5.1 – 10%.

4.11 The data confirms that the major participants are Tim, Philip, Kev (pub league team mates), Jamie (sports team lads) and Ben (competitive male) who in total comprise nearly 77.8% of the total motorsports participants in the area. The data for the 30 km catchment estimates that total participation in motorsports is 2675 adults.

4.12 It must be noted that this analysis reflects participation rather than people attending the stadiums to watch events.

Image 4.4 Population within Catchment Area Participating in: Motor Sports

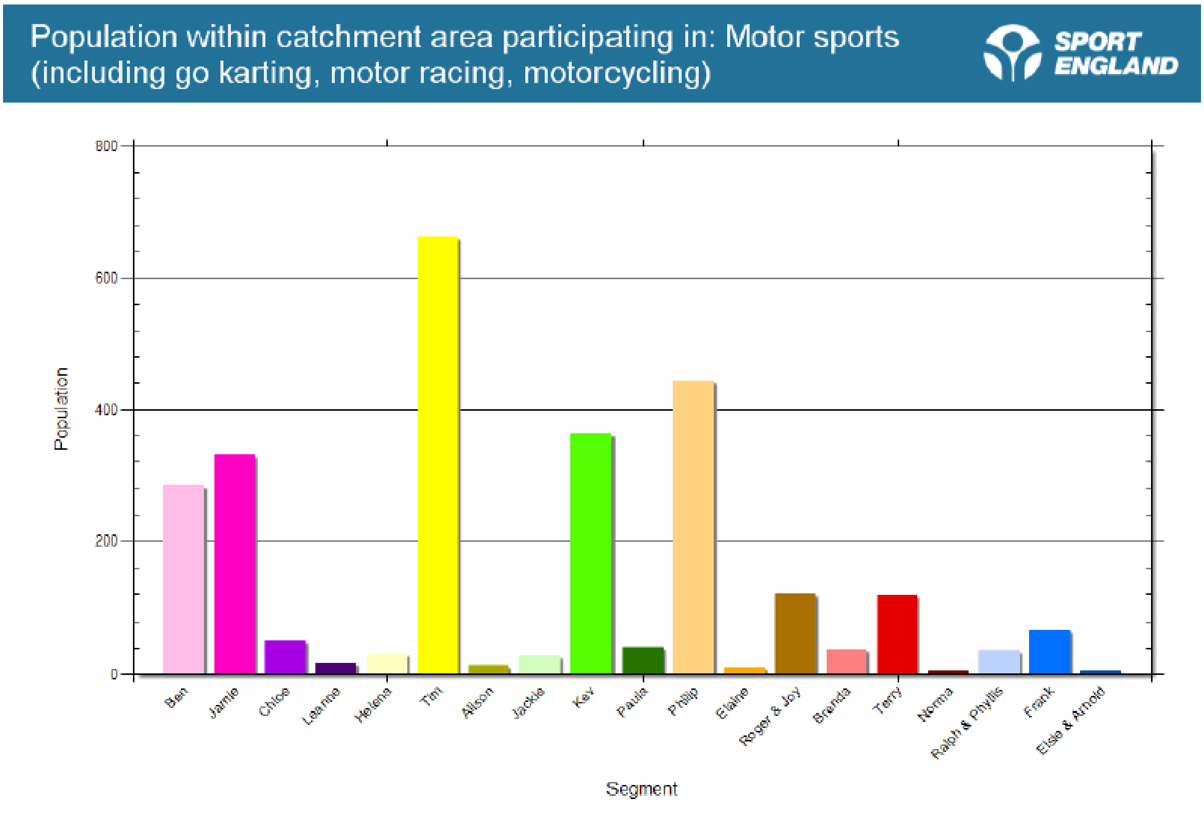

Image 4.5 Population within Catchment Area Participating in: Motor Sports

Segment	Catchment Pop.	LA Pop.	CSP Pop.	Rgn Pop.	Nat Pop.	Catchment	LA %	CSP %	Rgn %	Nat %
Ben	51792	3478	39905	172331	1989287	4.6	4.9	4.9	4.1	4.9
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Total	1114911	70883	817978	4201340	40254040	100	100	99.9	100.2	99.9

Summary of market segmentation

4.13 The five main market segments in the Coventry Stadium catchment are Tim, Philip, Roger and Joy; Elsie and Arnold and Elaine. Two of whom are the highest participants in motorsports nationally (Tim and Philip).

4.14 In terms of people within the catchment who (it is estimated by MS) do motorsport, the data confirms that the major participants are indeed the main segments set out above, Tim, Philip, Roger, Kev, Jamie and Frank who in total comprise nearly 77.8% of the total motorsports participants in the area. The MS data for the catchment estimates that total participation in motorsports is about 2675 adults of a population of 1,114,911 (population of all chosen segments in the catchment area), i.e. 0.24 %.

Latent and future demand

4.15 With regards to latent demand, potential demand for motorsports confirms that is broadly the same group that currently participate that they would like to participate more (Philip, Tim, Jamie, Ben and Kevin) totaling about 1479 potential participants, although these figures should be qualified as they represent a theoretical representation of latent demand for motorsports

4.16 Although the future population projections are too long term, are based only on Rugby itself and do not take into account future housing growth, the local area is anticipated to grow considerably in the future.

4.17 However, for the purposes of the study it may be necessary to conclude that in accordance with the existing character of the area, likely population change demand could reduced as population growth is being driven by older age cohort who are less likely to be motorsports participants, but that a specific target is not appropriate and an end date not identified. There could result in some reduction in demand but this is not quantified.

Summary

4.18 In summary, it can be concluded that participation in motorsports in the catchment area is law and latent and future demand is likely to be law. This reflects the general decline in interest in speedway and stock car racing.

5.0 CONCLUSIONS AND RECOMMENDATIONS

5.1 ANOG sets out the need for the supply and demand assessment to be brought together and the key issues arising analysed.

Key Issues

Supply of speedway and stock car racing facilities in the Coventry Stadium catchment area?

5.2 There are 3 speedway stadiums with within a 60-minute driving catchment of Coventry Stadium, and 4 stock car stadiums with a 60-minute driving catchment.

5.3 Speedway provision for the West Midlands region is relatively good compared to other regions (in 4th place in the region). With regards to stock car provision in the West Midlands is the best compared to other regions (1st). Therefore, residents in the West Midlands regions have a relatively good access to speedway and stock car tracks.

5.4 Furthermore, the fact that Coventry Stadium has closed due to lack of viability suggest an oversupply of facilities in the area.

Is there a strategic or local justification for allowing Coventry Stadium to close?

5.5 In view of the above, the industry will not be unduly harmed by closure of the stadium, and that there exists opportunities for provision to be consolidated at other stadia within the 60 minute catchment. On this basis speedway and stock car racing remains accessible to spectators (many people travel this far to watch football etc), and participants. The relocation of both speedway and stock cars to hold events at nearby stadia has been agreed and undertaken, which would not have been the case if it could not secure participants or garner reasonable support.

5.6 Again, the fact that Coventry Stadium has closed due to lack of viability suggest an oversupply of facilities in the area and it has been evidenced in the Turley report that before the site was sold that the stadium was in a poor condition and required improvements in particular to be approved to operate by the relevant health and safety authorities. Its closure has not hindered the development of motorsports in the West Midlands area given the supply over this wider area.

5.7 The Turley report summarises that there has been a general decline in the speedway and stock car sector with finical difficulties in the face of falling attendances and revenues the primary driver cited.

Is quality of facilities an issue in the Coventry Stadium catchment area?

5.8 As stated above there is an adequate standard of provision within the catchment, particularly given that other stadiums have been approved to operate by the relevant health and safety authorities (which Coventry Stadium has not) and that operations from other stadiums currently hold licencing rights for these sporting events (which for various reasons Coventry Stadium no longer does).

Is the provision of stadium facilities sufficient to meet future demand arising from housing development and additional population?

5.9 It is not considered that the unmet or latent demand is great enough to suggest that the provision of stadium facilities is not sufficient.

Conclusions

5.10 This report sets out a needs assessment which is proportionate and clearly illustrates using the ANOG methodology that there is sufficient quantity, accessibility and availability of provision of stadia both now and in the future in the Coventry Stadium catchment.

5.11 This assessment therefore concludes that under paragraph 97 A) that the there is adequate stadium provision in the area and the site can be released for development.

Appendix 1

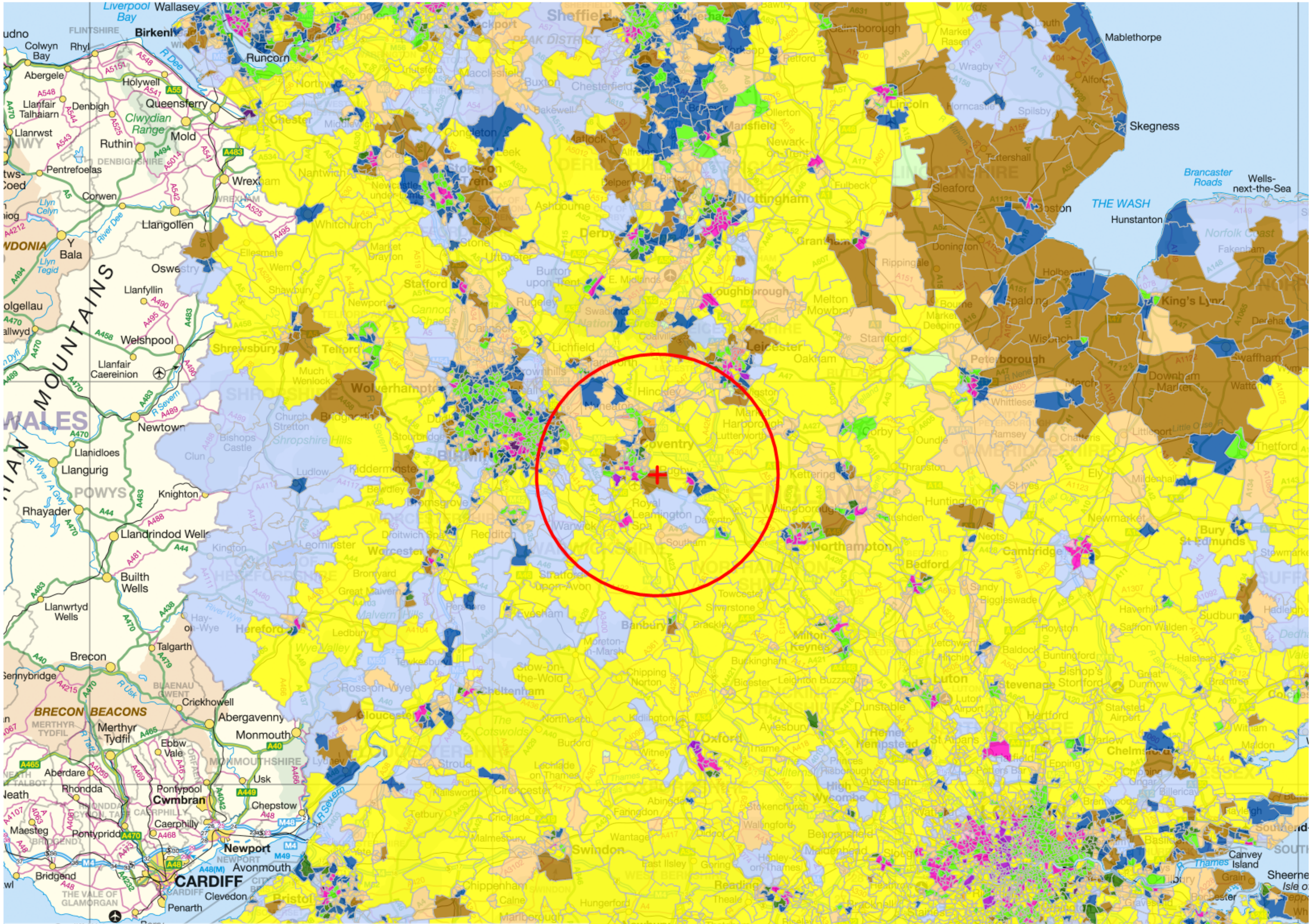
Dominant market segment by population

SPORT ENGLAND

Catchment area:
within 30 km of CV8 3GJ

- Ben - 1
- Jamie - 2
- Chloe - 3
- Leanne - 4
- Helena - 5
- Tim - 6
- Alison - 7
- Jackie - 8
- Kev - 9
- Paula - 10
- Philip - 11
- Elaine - 12
- Roger & Joy - 13
- Brenda - 14
- Terry - 15
- Norma - 16
- Ralph & Phyllis - 17
- Frank - 18
- Elsie & Arnold - 19

Catchment area
Middle Super Output Areas



Appendix 2

Percentage of population participating in: Motor sports (including go karting, motor racing, motorcycling)

SPORT ENGLAND

Catchment area:
within 30 km of CV8 3GJ

Percentage colour key:

- 80.1 - 100.0
- 40.1 - 80.0
- 20.1 - 40.0
- 10.1 - 20.0
- 5.1 - 10.0
- 2.1 - 5.0
- 1.1 - 2.0
- 0.1 - 1.0
- 0

- Catchment area
- Middle Super Output Areas