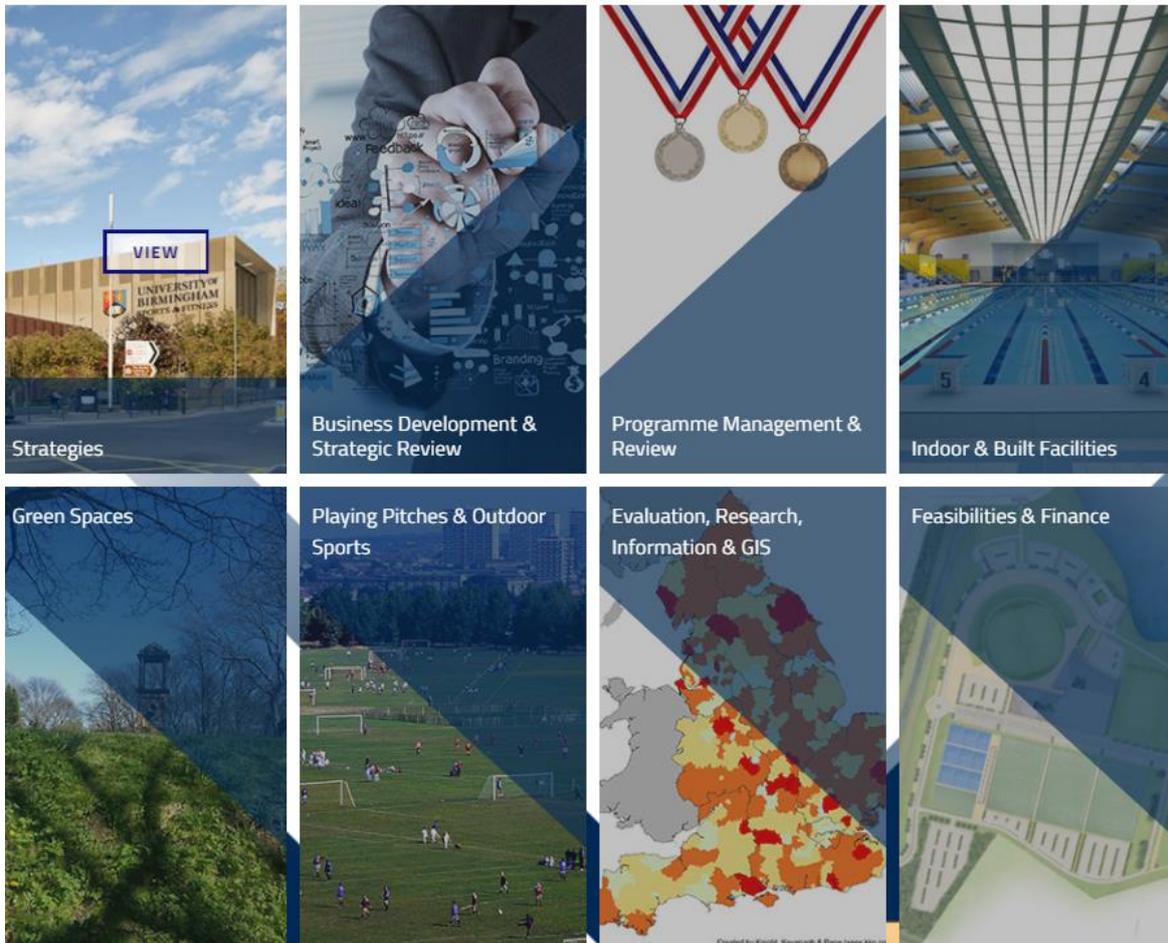


BRANDON ESTATES LTD



BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

APRIL 2023

QUALITY, INTEGRITY, PROFESSIONALISM

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BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

CONTENTS

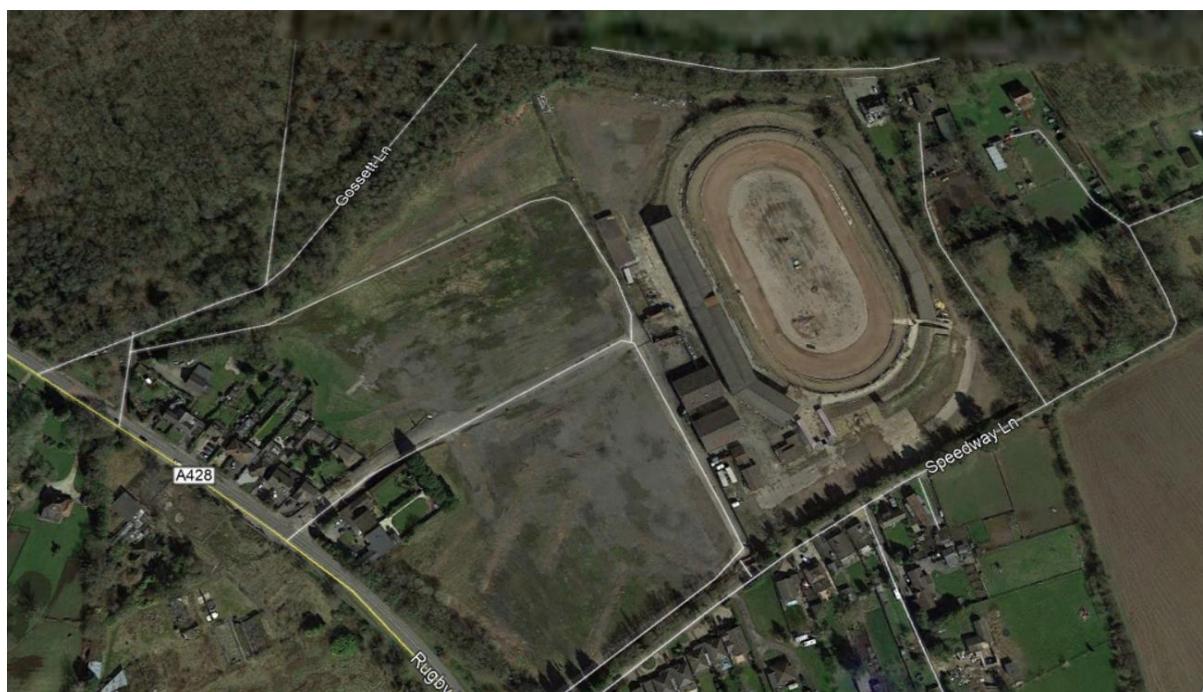
PART 1: INTRODUCTION.....	1
PART 2: STRATEGIC CONTEXT	3
PART 3: HISTORY OF BRANDON STADIUM.....	7
PART 4: NATIONAL TRENDS.....	10
PART 5: ASSESSMENT OF VIABILITY	16
PART 6: CONCLUSION	20
APPENDIX 1: SUPPORTING EVIDENCE	21

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

PART 1: INTRODUCTION

- 1.1 This report by Knight Kavanagh & Page (KKP) relates to the potential re-development of the speedway facilities at Brandon Stadium (also known as Coventry Stadium). The study was originally completed in December 2020 to inform a planning proposal at the site and has now been updated (April 2023) to incorporate and evaluate any Speedway viability changes that may impact on the original findings.
- 1.2 The site is within the Green Belt and located in the Rugby Borough Council authority area, albeit in close proximity to the boundary of Coventry City Council's administrative area. Its current status is shown in the figure below.

Figure 1.1: Aerial view of Brandon Stadium



Source: Google Earth

- 1.3 Plans are in place to develop 124 dwellings at the site in place of the existing speedway provision, which is no longer operational. However, for a proposal resulting in the loss of an outdoor sports facility to go ahead, planning policy needs to be met as per the National Planning Policy Framework (NPPF). The **wyg** report (the Brandon Stadium Independent Review) into the loss of the track was undertaken in September 2019. It considered the viability of re-developing or replacing the speedway track to provide appropriate mitigation, either on-site or off-site, and whether or not this was a practical solution. It concluded that, at that point in time, the track could not be deemed to be surplus to requirements.
- 1.4 This report is being produced concurrent with a feasibility study (also updated in 2023) that is evaluating the potential to install a full-sized third generation artificial grass pitch (3G pitch) and associated facilities on the site.
- 1.5 Both studies are being conducted to gauge which, if either, would be the best, most realistic and viable option in terms of mitigation.

BRANDON STADIUM

SPEEDWAY VIABILITY APPRAISAL

1.6 The viability appraisal is based upon:

- ◀ An assessment of the level of activity that was taking place at Brandon Stadium prior to its closure (also taking into account the reasons for the closure).
- ◀ A review of existing available research and reports on speedway provision including the **wyg** report.
- ◀ An analysis of the national and local 'market' for speedway and the current national position in respect of operational speedway stadia.
- ◀ An analysis of other speedway venues and their present status and viability.
- ◀ A precis of the known environmental impact of speedway provision e.g., air and noise pollution.

1.7 To inform the above, the process has incorporated consultation with operators of other speedway facilities across England. This has been done to ensure that the study is informed by a sound understanding of the factors required to make provision sustainable in the long-term. A focus has been placed on aspects such as facility and operational needs, existing business models, current demand and likely future trends. It has included discussion with:

- ◀ CEO - Gaming International (owner of Swindon and Poole speedway stadiums)
- ◀ Owner – Swindon Robins Speedway
- ◀ Former Chairman – British Speedway Promoters Association (*BSPA*)
- ◀ Co-ordinator - Speedway Control Board (*SBC*)

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

PART 2: STRATEGIC CONTEXT

- 2.1 This section of the report summarises previous work undertaken with regard to Brandon Stadium, it also covers national and local strategies and plans that potentially relate to the wider development of the site and the mitigation required. It helps set the scene in terms of speedway and the governance of the sport.

National and local context

National Planning Policy Framework

- 2.2 The National Planning Policy Framework (NPPF) paragraph 99 states that existing open space, sports and recreational buildings and land (which incorporates facilities for speedway) should not be built on unless:
- An assessment has been undertaken which has 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 needs for which clearly outweigh the loss.
- 2.3 Chapter 13 of the NPPF focuses on protecting Green Belt land. It notes that, once land has been defined, local planning authorities should plan positively to enhance use of the Green Belt, such as looking for opportunities to provide access; to provide opportunities for outdoor sport and recreation; to retain and enhance landscapes, visual amenity and biodiversity; or to improve damaged and derelict land.
- 2.4 Paragraph 143 of the NPPF states that “inappropriate development is, by definition, harmful to the Green Belt and should not be approved except in very special circumstances”. Green Belt boundaries should only be altered where exceptional circumstances are fully evidenced and justified, through the preparation or updating of plans.
- 2.5 Paragraph 145 details that the construction of new buildings within the Green Belt should be deemed to be inappropriate. However, one of the exceptions to this is “provision of appropriate facilities for outdoor sport, outdoor recreation and for cemeteries, as long as it preserves the openness of the Green Belt”.
- 2.6 Chapter 15 of the NPPF deals with conserving and enhancing the natural environment. Paragraph 170 states that planning decisions should prevent “new and existing developments from contributing to, being put at unacceptable risk from, or being adversely affected by, unacceptable levels of soil, air, water or noise pollution”. It goes on to say that development should “help to improve the local environmental conditions”.

Rugby Borough Council Local Plan (2011-2031)

- 2.7 Policy HS4 of Rugby’s Local Plan aligns to Paragraph 99 of the NPPF, stating that no existing open space, sports and recreational buildings and land should be built on unless one of the three exceptions are met.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

- 2.8 It adds that planning permission will be granted for development that enhances the quality and accessibility of existing open space providing it is accessible and of high quality, and that it:
- ◀ Is appropriately maintained.
 - ◀ Is secure and safe.
 - ◀ Is attractive in appearance.
 - ◀ Enhances the natural and cultural environment.
 - ◀ Is conveniently accessed and facilitates access to other areas of open space.
 - ◀ Facilitates access by a choice of transport; and
 - ◀ Avoids any significant loss of amenity to residents, neighbouring uses or biodiversity.
- 2.9 In relation to Green Belt land, the Local Plan states that development will only be permitted where National Policy allows.
- 2.10 Policy HS5 of the Local Plan deals with air quality, noise and vibration. It states that development proposals should look to minimise impact on air quality, noise and pollution. Proposals for more than ten dwellings need to achieve or exceed air quality neutral standards or address the impact of poor air quality by reducing exposure and mitigating effects. Similarly, any adverse impacts of noise or vibration on existing and future occupiers and users of public space must be addressed.

Brandon Stadium – wyg report¹

- 2.11 **wyg** was appointed by Rugby Borough Council to undertake a review of the sports planning case in respect of Brandon Stadium with a view to supporting its decision-making process. This followed submission of an outline planning application for the demolition of the speedway track to enable residential development on the site.
- 2.12 Supporting documents were presented, including a sports needs assessment; however, a campaign group submitted separate information to counter the evidence provided. The Planning Inspector commented that the Council needed to start from the basis of safeguarding provision in line with the general policy for sport and recreation buildings and to assess the application in the context of the NPPF.
- 2.13 The **wyg** report concluded that, despite highlighting that the question of viability of a speedway operation at Brandon Stadium is difficult to interrogate and respond to, that there is not an “unequivocal case that Brandon Stadium is surplus to requirements”. This was also despite the intent of the Framptons Town Planning Consultants Sport Needs Assessment to prove this. Consequently, point A of Paragraph 99² of the NPPF, which says that “an assessment has been undertaken which has clearly shown the open space, buildings or land to be surplus to requirements”, is deemed not to have been met.
- 2.14 It suggested that the alternatives set out by the NPPF need to be considered, with the applicant instead being recommended to explore point B of Paragraph 99, “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 point C, “the development is for alternative sports and recreational provision, the benefits of which clearly outweigh the loss of the current or former use”.

¹ See Appendix item 1.1 for the full report.

² Please note that at the time of the wyg report, this was Paragraph 97 but has subsequently changed in Paragraph 99 (the wording is unaltered).

BRANDON STADIUM

SPEEDWAY VIABILITY APPRAISAL

Save Coventry Speedway and Stox Campaign Group (SCS)

- 2.15 SCS is an umbrella grouping of people who wish to see the long heritage of speedway and stock car racing in Coventry continue and to be returned to Brandon Stadium. SCS was consulted as part of the **wyg** report and openly objected to the proposed loss and redevelopment of the Stadium. In April 2018 SCS released a planning objection on its website, stating that the objective of forming the campaign group was to “identify a clear vision, avoid duplication of effort, and co-ordinate activities to achieve that vision in a structured manner”.

Governance of Speedway and other activities

The Auto Cycle Union (ACU)

- 2.16 The ACU is the internationally recognised national governing body of sport (NGB) for motorcycle sport in the British Isles, covering all forms of (on and off-road) motorcycle sports including speedway. It represents licence holders, volunteer marshals, officials, clubs, and issues thousands of motorcycle sport permits annually. In the context of this study, its pertinent role is that it is “in constant contact with many Government departments to defend and develop motorcycling”.

Federation Internationale de L’Automobile (FIA)

- 2.17 The FIA is an international governing body for motorsport which was established in 1904. Its primary purpose is the licensing and sanctioning of a range of international motorsport events including, but not limited to, Formula One, the World Touring Car Cup and the World Rally Championships as well as the Speedway Grand Prix and Speedway of Nations. Various national federations affiliate to the FIA, including the ACU.

British Speedway Promoters Association (BSPA)

- 2.18 The BSPA is responsible for organising speedway fixtures and events in the United Kingdom. These include Premiership, Championship, National Development and youth leagues. The BSPA is also responsible for the promotion of FIA events staged in the UK. By way of supplementary context, each professional speedway club is managed by a promoter and these promoters are members of the BSPA. In addition, the BSPA is responsible for the overall management of the Great Britain speedway team.

Speedway Control Board (SCB)

- 2.19 The SCB is authorised by the ACU to act as the recognised NGB for speedway racing in the UK. It is financed entirely by fees generated via the issue of track licenses, rider registrations, and official’s licenses. The SCB acts as the independent body to ensure that the BSPA, member tracks/venues, riders and officials all act within its rules and regulations. Its Board comprises nominated members representing the ACU and BSPA, under independent chairmanship, the role of which is currently covered by a former speedway referee.

British Stock Car Association (BriSCA)

- 2.20 BriSCA Formula One is the brand name of the British Stock Car Association, the organisation responsible for the operational organisation and delivery of BriSCA Formula One Stock Car Racing in the UK. The organisation consists of six permanent promoters, one of which acts as chairman. In addition, a proportion of members work in liaison with members of the British Stock Car Drivers Association to form the BriSCA Management Board, which acts as the NGB.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

- 2.21 The origins of this motorsport can be traced back to 1954, with the first ever stock car race taking place at New Cross Stadium, London. All venues that stage BriSCA events are required to be licensed and meet NGB requirements. Due to the similarity of requirements, venues used are generally those that also host speedway events.

Greyhound Board of Great Britain (GBGB)

- 2.22 The GBGB's role is to safeguard the integrity and future prosperity of greyhound racing so that it continues to be a successful, sustainable sport with welfare at its heart. It oversees 20 stadia (15 category one) across the Country and ensures that each race is run fairly and clearly.
- 2.23 Traditionally, many speedway venues have doubled up as greyhound tracks including, originally, Brandon Stadium itself. However, this is becoming much less common and many such venues have closed in recent years or remain open but without an attached speedway club. The only tracks that are still 'dual use' are Newcastle Stadium, Owlerton Stadium (Sheffield), Perry Barr Stadium (Birmingham), and Monmore Stadium (Wolverhampton).

Summary

- 2.24 The **wyg** report on the development of Brandon Stadium sets out that some form of mitigation is required to enable the loss the speedway provision on the basis that the existing provision has not been deemed to be surplus to requirements. The question is whether point B of Paragraph 99 of the NPPF could be pursued i.e., via re-development of the speedway facility, or whether a different approach is needed and that point C (the development is for alternative sports and recreational provision, the benefits of which clearly outweigh the loss of the current or former use) is a more viable option to pursue. Only one exception needs to be met to adhere to planning policy.
- 2.25 Using the above, to inform what is required, consideration needs to be given to expected usage levels and physical activity benefits, as well as ultimately whether or not a replacement track would be viable and sustainable in the long-term. When considering re-development of speedway provision from a planning perspective, attention must also be given to its environmental impact, especially in relation to air and noise pollution. In addition, the Green Belt status of the existing site, or any alternative site, should also be accounted for, with the openness of the space needing to be preserved. Any proposal must be delivered in a way that complements the local surroundings. Furthermore, it must also be considered that potential environmental limits (e.g., limited track days due to noise pollution) ultimately impact the facilities financial viability as a speedway/motorsport venue.
- 2.26 Consideration must be given to the governance of speedway and how it operates, as well as other sports and activities that have and could utilise the facility. Whilst speedway is the only Sport England recognised sport that might use the venue (it does not recognise stock cars or greyhound racing), other activities are important to supplement usage and income.
- 2.27 Notwithstanding the above considerations, it must also be noted that, given deficiencies within the **wyg** report and the time that has passed since it was produced, the validation of its conclusions can also be called into question. This would therefore also bring into play point A of the NPPF and that the provision could in fact be considered surplus to requirements.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

PART 3: HISTORY OF BRANDON STADIUM

- 3.1 The section of the report provides background information relating to Brandon Stadium, with particular focus on past users and usage levels, where this is known.

Brandon Stadium

- 3.2 Brandon Stadium opened in 1928 and was first used for speedway events. The original sports needs assessment produced on behalf of Brandon Estates in 2018 provides some historical detail on the facility. The Stadium was owned and operated by the Sanderson family (as majority owners) and Charles Ochiltree (minority shareholder), who also went on to acquire the Lythalls Lane Stadium in Coventry and the Leicester Stadium. Once these acquisitions were complete, the owners formed Midland Sports & Stadia Ltd, which operated all three. Functioning as part of this entity, Brandon Stadium traditionally hosted a variety of motorsports, with speedway and banger/stock car (including BriSCA F1) racing being the primary formats.
- 3.3 In addition to motorsport, the Stadium hosted greyhound racing meets from 1978 onwards. However, due to various factors, this was not a permanent activity and only took place intermittently from 1978-1986, then from 2004-2009 and finally from 2012-2014.
- 3.4 In 2003, Midland Sports & Stadia Ltd sold the Stadium to Mr Avtar Sandhu. Included in this purchase was the promotional right to hold speedway and stock car racing events at the venue.

Speedway – Coventry Bees

- 3.5 As abovementioned, speedway racing has taken place at Brandon Stadium since 1928. The initial users were the former Coventry City Speedway Team, which used the facility from its opening, and only ceased operations during the Stadium's use as a workshop during World War Two. Following the end of World War Two, in 1948, the Stadium re-opened.
- 3.6 The Coventry Bees Speedway Team formed, competed at the Stadium from 1948 through to its closure in 2016. The promotion of speedway at Brandon Stadium and the management of Coventry Bees was handled by Charles Ochiltree until his death in 1998, at which point duties were passed to his son before being transferred to Mr Avtar Sandhu in 2003 following his purchase of the facility. The Coventry Bees and its promotional rights were subsequently acquired by local businessman Michael Horton in September 2011.
- 3.7 During the Coventry Bees tenure at Brandon Stadium, the Club was very successful and in total won 28 championship titles. These include:
- ◀ Elite League Champions – 2005, 2007, 2010 (forerunner to the current Premiership)
 - ◀ British League Champions - 1968, 1978, 1979, 1987, 1988 (Elite League forerunner)
 - ◀ 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
- 3.8 For the majority of the Club's history, it has operated with one adult team, although this was complemented by the addition of Coventry Storm from 2014 onwards. Coventry Storm acted as a feeder team for Coventry Bees and competed in the National Development League.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

- 3.9 In respect of specific activity at Brandon Stadium prior to its closure, desk-based analysis of speedway fixtures at the site - detailed in the table below. As is evident, the number of fixtures for Coventry Bees reduced from a maximum figure of 33 in 2000 to a low of 19 in 2013. It then increased to 44 in 2014 due to supplementary Coventry Storm fixtures being added. It fell to 36 in 2015 before again rising, slightly, to 37 in its final year of operation in 2016.

Table 3.1: Brandon Stadium speedway fixtures (2000-2016)

Year	Number of Coventry Bees fixtures	Number of Coventry Storm fixtures
2000	33	-
2001	25	-
2002	28	-
2003	25	-
2004	27	-
2005	27	-
2006	32	-
2007	32	-
2008	30	-
2009	29	-
2010	27	-
2011	22	-
2012	27	-
2013	19	-
2014	26	18
2015	22	14
2016	21	16

- 3.10 The source of the fixture data is the Coventry Bees website; further analysis is detailed in Part 5 of this report.
- 3.11 Following closure of Brandon Stadium, Coventry Bees entered into a groundshare agreement with Leicester Lions at Beaumont Park Stadium. However, due to stadium capacity issues, it was not allowed to participate in the Premiership as it was unable to satisfy the BSPA that it could fulfil all its fixtures.
- 3.12 In 2018, the Club reformed to compete in the National League, with fixtures again being scheduled at Beaumont Park Stadium. This, however, lasted just one season as following Leicester's promotion it decided to run its own National League team at Coventry Bees' expense. Coventry Bees has not participated since and is now considered homeless (if not defunct).

BRANDON STADIUM

SPEEDWAY VIABILITY APPRAISAL

Coventry Stox (BriSCA racing)

- 3.13 BriSCA F1 racing began at Brandon Stadium in 1958 and ran on the first Saturday of every month from April until November before ending at the point of venue closure in 2016. In 1960, the BriSCA F1 World Championship³ was first held at the Stadium and since then it has hosted this as well as numerous other championship events - including:
- ◀ 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)
- 3.14 Similar to the speedway operation, promotion of BriSCA F1 racing was historically undertaken by the Ochiltree family until the sale of the Stadium and promotional rights in 2003. It was then promoted by Mr Avtar Sandhu, under the name Coventry Stox, via a lease granted to Coventry Racing Club Ltd, until the end of the 2016 racing season.
- 3.15 There is limited data available on the number of stock car events held at the Stadium prior to 2010. In that year, 19 events were staged, whilst only nine were held in 2016, suggesting a significant reduction over the time period.

Greyhound racing

- 3.16 The first greyhound racing meet at Brandon Stadium took place in 1978. It was then intermittent, with regular meets taking place between 1978-1986, 2004-2009 and finally from 2012-2014, but little being scheduled in years outside of these periods. Greyhound racing finally ceased when the stadium had its license revoked by the Greyhound Board of Great Britain in February 2014 due to it incurring significant financial losses over consecutive years.
- 3.17 Meets at the stadium were organised by Coventry Dogs Ltd. This was dissolved in December 2015. It is understood that it arranged independent events following the loss of its licence in 2014, although further information relating to this is unavailable.

³ World Championship is the brand name of the event, rather than it being formally recognised as such.
April 2023 Knight Kavanagh & Page 9

BRANDON STADIUM

SPEEDWAY VIABILITY APPRAISAL

PART 4: NATIONAL TRENDS

- 4.1 In the first instance, it should be noted that up to date information relating to speedway events and attendances for either domestic or international fixtures/events is difficult to obtain on a reliable and consistent basis. No figures are published by the ACU, BSPA, and SCB. As such, it is accepted that in preparing this report KKP is unable to provide a full picture in terms of trends. The primary purpose has been to analyse information that is known and to use this wherever possible, to make realistic, appropriate but caveated statements and assumptions.
- 4.2 Some national trends were presented as part of the consultation for the redevelopment of Arena Essex in Thurrock (application reference 18/01671/FUL). At this site, plans are in place for 2,500 homes to be developed on a wider parcel of land and for the former speedway stadium to be demolished, with final planning permission currently pending as of April 2023. Mitigation has been offered in the form of alternative sports and recreational provision. In this instance, proposals include creation of a lido, mountain bike routes and a BMX pump track.
- 4.3 The trends⁴ presented which are relevant to this report are as follows:
- ◀ Motorsports participation including speedway, go karting and moto-cross is in decline nationally. In 2016 adult participation had fallen to 0.06% of the population participating at least once a week; this is a reduction from 0.10% of the population in 2008.
 - ◀ Speedway has been in historic decline as a spectator sport. This is exemplified by the fact that television audiences have declined by 77% over a 10-year period (2009-2019).
 - ◀ It does not attract high levels of commercial sponsorship compared to other sports. This has contributed to facilities at speedway tracks being unable to secure the investment required to modernise to help the sport to attract new, and retain existing, audiences.
 - ◀ The sport has struggled to adapt to attract new participants and spectators while others have successfully drawn in new audiences. Speedway is an adult male dominated sport in terms of both riders and spectators.
 - ◀ Most speedway clubs now struggle to run training schools or junior development programmes that would, were they operational, assist in developing the sport.
 - ◀ It only has a small number of riders who are transient in terms of the clubs for which they ride and do not usually have an association with the local area in which clubs are based.
- 4.4 Further to the above, a Needs Assessment for the Arena Essex Development⁵ was produced by **wyg**. This concludes that the venue is not a viable operation due to declining interest in speedway, stating that the alternative provision proposed “will far outweigh” the benefit of the current motorsport provision. Over the period 2008-2017, average attendance for fixtures at this venue declined by 59% from an average of c.860 to an average of c.340.
- 4.5 It is generally agreed that the high point for speedway venues was after the second world war and then again in the 1960s. In both periods, crowds were big and even Wembley Stadium supported a team. During that period, tracks flourished, and young home-grown riders dominated the sport. Now, promoters run the clubs and the sport, and the consultees reported lack of long-term planning and thinking is resulting in a day-to-day struggle for teams to stay afloat. A number of speedway teams are currently up for sale or seeking alternative owners, whilst there are also plans within the sport to merge the top two leagues and reduce the total number of teams in an attempt to provide a more sustainable future.

⁴ These trends were presented as part of a consultation response for the proposed redevelopment of Arena Essex and Sport England submitted the information as part of the process in an email dated 24th January 2019, as shown in Appendix One.

⁵ See Appendix item 1.2 for report.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

- 4.6 It could be argued that speedway has failed to reinvent itself and adapt to the 21st century. Other sports have engineered a shift to provide greater entertainment value with a focus on attracting new audiences and enhancing the spectator experience. This often takes the form of adding production value to fixtures and making their sport more interactive and engaging for a wider range of spectators. There is no evidence of this happening in speedway; although there are no available statistics on age demographics of fans in the sport, the primary consumer is thought to comprise predominantly older males.
- 4.7 Speedway also has a diminished position in the media, despite previously having secured Sky TV coverage. Due to this, it does not attract high levels of commercial sponsorship relative to that achieved by many other sports. This vital revenue stream is key to building sustainability. This position gives speedway limited revenue to invest in new and improved facilities, and when coupled with decreasing gate receipts, barely provides sufficient income to break even and buck the trend of speedway stadia closure. These two factors mean that the sport is struggling to be sustainable and is clearly in a state of retraction, team sales and closures.
- 4.8 In 2017, Sky Sports took the decision to stop broadcasting live speedway fixtures having been the TV home for UK speedway broadcasting for 20+ years and despite its contract having two years left to run. This decision was attributed to a substantial decline in viewing numbers, with the average reducing from 145,550 in 2008 to just 34,000 in 2017.

Table 4.1: UK Average Speedway TV viewers (up to 2017)⁶

Year	Average TV viewers per event
2008	145,550
2009	106,944
2010	74,733
2011	80,611
2012	71,809
2013	57,750
2014	67,260
2015	70,822
2016	67,181
2017	34,000

- 4.9 Coverage was picked up by BT Sport after 2017 but the audience viewer base subsequently declined by a further 50% and, as of 2020, BT Sport and Eurosport⁷ primarily broadcast only International FIM events including the Grand Prix series and Speedway of Nations. For the 2023 season, British Speedway Premiership and Championship fixtures are streamed online via a subscription model by Exstream Media Ltd under the brand British Speedway Network. As far as we are aware, the viewing figures for this are not available to us and are, thus, unclear.
- 4.10 Added to this, the quality of speedway stadia in the UK is generally considered to be poor, with the possible exception of the National Speedway Stadium in Manchester which received significant investment from Manchester City Council in 2016. The challenges and general decline of speedway in the UK has led to a number of stadia closures, with the primary drivers cited being unsustainable revenue streams due to declining attendances and fewer broadcasting deals.

⁶ Figures sourced from Arena Essex Needs Assessment evidence base.

⁷ Due to a buyout of BT Sports, it and Eurosport will operate as TNT Sports from July 2023 onwards.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

- 4.11 Traditionally, speedway aims to be affordable and accessible entertainment. As a result, clubs keep the price point low in order not to alienate the core market. However, at the same time, the costs of running a club continue to increase, most notably in relation to rider's wages. This creates a highly challenging environment for clubs to survive commercially.
- 4.12 Analysis of BSPA fixture data clearly shows that participation in the sport is in decline; the primary factor in the high number of clubs folding and/or stadiums closing. From a high of 43 teams participating in 2006, there are now just 26; there has been a particularly sharp year-on-year decline from 2016 onwards.

Table 4.2: – Number of Speedway teams competing in BSPA leagues

Year	SGB Premiership ⁸	SGB Championship ⁹	National Development League	Total
2005	10	15	-	25
2006	11	14	18	43
2007	10	10	10	30
2008	9	16	8	33
2009	9	14	10	33
2010	9	14	10	33
2011	10	10	10	30
2012	10	13	8	31
2013	10	13	8	31
2014	9	13	9	31
2015	8	13	10	31
2016	8	13	12	33
2017	8	10	11	29
2018	7	11	10	28
2019	7	11	8	26
2020 ¹⁰	-	-	-	-
2021	6	11	6	23
2022	6	10	8	24
2023	7	9	8	24

- 4.13 Taking account of all formats of the sport in which teams are run, in total by 2023, there has been a 27% decline from the levels being fielded in the 2016 season.
- 4.14 Seventeen speedway teams have ceased operations since 2005, as evidenced in the table overleaf.

⁸ SGB Premiership was previously branded as 'Elite League' from 2005-2016

⁹ SGB Championship was previously branded as 'Premiership' from 2005-2016

¹⁰ Season cancelled due to Covid-19 Pandemic.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

Table 4.3: Defunct Speedway teams

Team	Folded (year)
Exeter Falcons	2005
Hull Vikings	2005
Wimbledon Dons	2005
Oxford Cheetahs	2007
Boston Barracudas	2008
Reading Bulldogs	2008
Weymouth Wildcats	2010
Hackney Hawks	2011
Newport Wasps	2011
Coventry Bees	2018
Lakeside Hammers	2018
Rye House Rockets	2018
Workington Comets	2019
Stoke Potters	2019
Eastbourne Eagles	2021
Newcastle Diamonds	2022
Swindon Robins	2023

- 4.15 The most recent club to fold is Swindon Robins, which occurred via mutual agreement between the Club and its site operator due to the struggles faced by it and speedway as a whole. This primarily happened because of financial reasons. Robins won the Premiership as recently as 2019, but the owners of its Abbeyfield Stadium home venue, Swindon Speedway and Stadia UK, announced in September 2022 that the stadium would close permanently. In the statement¹¹, it was stated that "with the prevailing financial climate, the uncertainty over the long-term future of greyhound racing, and the inability to operate additional events, speedway racing cannot achieve anything like a break-even financial position, short term or long term."
- 4.16 Following the closure, a new company (Swindon Motorsports Ltd.) was formed to explore options to develop a purpose-built motorsports arena in Swindon. Consultation with the CEO of Gaming International suggests that early plans for the facility are for it to be located away from residential properties - to allow more regular usage from a broader range of motorsports user groups, to in turn help to ensure the new venue's financial viability. Swindon Robins' demise is a clear example of the financial viability challenges faced by speedway clubs.
- 4.17 Via the desk research conducted for this study, it is also understood that Wolverhampton Wolves speedway will not have its lease at Monmore Stadium renewed at the end of the 2023 season¹². Stadium owners are reportedly planning to focus solely on greyhound racing.
- 4.18 Consultation confirmed that the frequency and regularity of weekly fixtures is not the ideal format to attract new audiences to speedway on a routine basis. This is, in the view of the experts consulted, mainly because the leisure market in 2023 is saturated with alternatives. It has, thus, become more challenging to attract more casual or non-diehard speedway fans who only wish to attend on an occasional basis (i.e., for one or two events per year).

¹¹ See Appendix item 1.3 for the full statement.

¹² See Appendix item 1.4 for further detail.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

- 4.19 To address this, other strategies to promote and market speedway events are deemed to be required. Options have been explored with regard to creating special events or themed nights that appeal to specific demographics or interests; however, these have struggled to be the catalyst to put speedway back on the map, and more importantly do not solve the issue of sustaining regular income to improve club/stadium viability.
- 4.20 By way of reinforcement of this analysis, in March 2019, the Guardian published an article focusing on challenges faced by speedway, '*Out of time and on the skids: speedway's struggle for survival*'¹³. This provides some insight into the demise of Workington Comets in particular, stating that the Club had announced that it was pulling out of the sport despite winning three trophies the prior year. This was a result of it "losing money every year and the sporting success coming at a huge financial cost".
- 4.21 In 2021, the Spectator published an article further highlighting the challenges facing the Sport, '*Why did Britain fall out of love with speedway?*'¹⁴. This provides a narrative describing a stagnant fan base in terms of the age and demographic of spectators attending speedway fixtures. It noted that Redcar Speedway surveyed its supporters in 2019 and discovered that more than half had been attending speedway events for at least 40 years, suggesting that they were in their fifties and beyond. As indicated it is evident that Speedway is struggling to attract interest from a younger demographic.
- 4.22 Speedway participation is transient. It can be argued that it is not really a true 'team' sport. Most riders participate in at least two, sometimes three, and occasionally four European leagues at one time, meaning there is little embedded club loyalty. They can easily switch clubs or may be dropped without notice if they suffer an injury or have a poor run of form.
- 4.23 In an ideal setting, clubs would have a youth policy and develop their own riders, putting them on contracts, which would encourage trust and loyalty on both sides. However, for a variety of reasons, they now rarely run training schools or junior development programmes. Finance is a crucial factor, but this is also affected by reliance on hired stadia not enabling clubs to access tracks for practice outside of race days.
- 4.24 The picture is similar for participation in stock car racing; the number of events is declining as the number of available speedway venues reduces. Based on the BriSCA fixture lists, between 2019-2023¹⁵, the 14 stock car venues nationally ran a total of just 181 BriSCA F1 events as detailed in Table 4.4 below.

Table 4.4: Number of fixtures by venue (UK based) for BriSCA F1 events 2019-2023

Venue	2019	2020 ¹⁶	2021	2022	2023
Kings Lynn	7	3	6	7	6
Belle Vue	6	-	-	-	-
Bradford	-	-	9	8	8
Stoke ¹⁷	2	-	-	-	-
Skegness	7	4	9	9	8
Sheffield	3	-	5	3	3
Mildenhall	1	-	1	5	4

¹³ See Appendix item 1.5 for full article.

¹⁴ See Appendix item 1.6 for full article.

¹⁵ Includes 2023 fixtures which are scheduled to take place March-November.

¹⁶ Shortened season due to Covid-19 Pandemic.

¹⁷ The Stadium in Stoke closed at the end of the 2019 season and is no longer functioning as a facility.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

Venue	2019	2020 ¹⁶	2021	2022	2023
Northampton	8	-	7	6	7
Birmingham	4	-	-	-	-
Ipswich	1	-	1	1	1
Hednesford	2	-	1	2	3
Buxton	2	1	4	1	3
Lochgelly	-	-	-	1	-
Cowdenbeath	-	-	-	1	-
	43	14	43	44	43

4.25 Similarly, as noted earlier, greyhound racing is also seemingly in decline. As noted previously, only four speedway venues now double up to service greyhound racing. At present, just 20 active facilities host greyhound racing across the Country, with only 15 being considered Category One facilities¹⁸, despite there being over 100 in the 1950's.

¹⁸ See Appendix item 1.7 for further detail.
April 2023

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

PART 5: ASSESSMENT OF VIABILITY

- 5.1 The 2019 **wyg** report on Brandon Stadium identified that the viability of the facility was difficult to establish. A financial assessment was produced by Rugby Borough Council in November 2017 seeking to piece together the various strands of the financial jigsaw; it concluded that clarity surrounding the commercial operation was still limited. Ultimately, stadium viability is entangled in the finances of individuals and individual companies who/which are no longer available to consult or are unwilling to disclose, information..
- 5.2 Based on the above, this report does not look to determine whether the now closed speedway track at Brandon Stadium was a viable enterprise, but rather looks to evidence whether a re-developed facility could be sustainable. This takes into account the previous offer but is predominantly informed by consideration of the aforementioned sporting trends and analysis of consultation with and information supplied by other providers nationally.
- 5.3 As a starting point, it is reported in the **wyg** report that, on the basis of linked condition survey work, the estimated cost of re-instating the Stadium (at 2017 prices) was £3.73 million due to the significant quality issues that had been by the lack of maintenance since closure. This substantial amount is considered to be the minimum that any future operator would have to proffer in order to enable appropriate licences to be accredited, although it should be noted that the SCS believes that the cost of bringing the stadium back into use would be substantially lower (citing support from local businesses and pledges from volunteers). It is also, however, reported that the group has not had access to the site, meaning any alternative cost estimate cannot be scrutinised or verified.
- 5.4 It is also well documented that building cost inflation has risen significantly over recent years and would be likely to make the investment required substantially higher now, whilst the condition of the site is likely to have worsened without maintenance. A headline summary cost produced (by RBL) in 2023 identifies that the cost of refurbishment of the previous facility (i.e., to the same standard) will be between £13.5 million and £15 million.
- 5.5 In 2016, the year prior to the closure of Brandon Stadium, 37 speedway fixtures were held in addition to nine stock car fixtures. When this volume of activity was tested during consultation with providers of other facilities, it was deemed to be nowhere near sufficient for a viable operation. The general contention was that significantly more meetings are required.
- 5.6 Given this, the long-term viability of redeveloping the track must be questioned, especially when considering that initial usage would, at first, almost certainly be below pre-closure levels. Coventry Bees previously had two teams but would be more likely to have just one were it to be re-established; at least initially.
- 5.7 As highlighted earlier in this report, nationally, over the last two years, three clubs (Newcastle, Eastbourne and Swindon) have ceased operations, further reinforcing the contention that nationally the sport is in decline. Swindon as a previous staple of the sport in the UK is sadly a good example of how the current format of speedway racing is not viable in the long term. There is also no guarantee that stock car racing would return to the site.
- 5.8 Furthermore, the viability of speedway operation has traditionally been strongly linked to commercial income. This has declined significantly in recent years exacerbated by the loss of the Sky TV (and BT) deals. It shows no sign of improving in the foreseeable future. This decline has meant that providers are now even more reliant on income from spectator attendance and secondary spend.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

- 5.9 The number of spectators has been reducing across the Country, as evidenced at the Essex Arena, which was the home of a team (Lakeside Hammers) competing in the same league as Coventry Bees. When engaging with consultees for this report, it was stated that revenue produced from attendance at home fixtures can now equate to up to 50% of all revenue for speedway operations.
- 5.10 Furthermore, the impact of both the Covid-19 pandemic and current financial pressures brought on by the substantial increases in energy costs and the impact of the cost-of-living crisis have further exacerbated what was already a highly challenging financial situation for speedway and its 'partner sports'. All these factors have developed/emerged since the **wyg** report was published and were, therefore, not factored into its analysis.

wyg review: 2023 KKP analysis

- 5.11 Based upon both the findings of this study and KKP's earlier 2020 report, it is agreed that ascertaining the viability of speedway as a sport and at Brandon Stadium is challenging. However, it does not seem reasonable to conclude that Brandon Stadium is not surplus to requirements, simply because information was lacking when the **wyg** report was produced. This instead appears to represent a shortcoming within the methodology undertaken and the analysis carried out.
- 5.12 Moreover, a review into speedway at Arena Essex, also completed by **wyg**, came to a different conclusion, so it is difficult to comprehend how it could ascertain viability that case but not in relation to Brandon Stadium. In the Arena Essex study, it states that:

"Speedway is also a sport in decline, consolidating if not contracting, the impacts in terms of participants and spectator numbers has dwindled to an extreme low and is likely to continue in this way until the last of the UK clubs finds it uneconomic to continue. Many teams are currently up for sale or seeking alternative owners and there are also potential plans within the sport to merge the top two leagues and reduce the total number of teams in an attempt to provide a more sustainable future for the sport."

- 5.13 This is more aligned to the findings of this document than what was detailed in **wyg's** Brandon Stadium report. In addition, as is the case with Brandon Stadium, it was proposed that the loss of Arena Essex would be mitigated via the development of other sport and recreation facilities. In this regard, **wyg** concluded that:

"This report has sought to demonstrate that the existing facilities at Arena Essex are no longer required and secondly that replacement by the proposed new facilities at Lakeside are both justified and sustainable and will have a greater sporting impact than the existing motor sports facilities, thus justifying the loss. It demonstrates that the economic and social impact of the proposed facilities will far outweigh the benefit".

- 5.14 Furthermore, it is clear from the analysis within this report that speedway clubs/venues across the Country are struggling and that these struggles have worsened since the **wyg** was produced. As detailed, spectator numbers and associated revenue streams for speedway and other motorsports like stock car/banger racing that utilise the same venues are continuing to shrink. In addition, as noted, the impact of Covid-19, the rise in energy costs and more recent inflation-based cost of living factors were legitimately – at the point when the **wyg** report was produced – not considered.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

- 5.15 Based on the above and the analysis contained in this report, it is considered reasonable to challenge the findings/recommendations set out in **wyg**'s 2019 review. This applies to:
- ◀ It was published in 2019 and it is clear that the findings/evidence base on speedway (and other associated motorsports) applied then are now out of date. As noted throughout and detailed specifically in Section 4 of this report, the national situation for speedway has become substantively more challenging in the years since.
 - ◀ It was (in 2017) estimated that the cost of reinstating the stadium would be around £3.73m. The **wyg** report acknowledged that costs were likely to have increased – in 2019 – and questioned the viability of carrying out the required works to reinstate the stadium. The level of building cost inflation over the intervening period – to 2023, means that costs will have increased further (likely considerably).
 - ◀ In 2019, the **wyg** report concluded that there is “not an unequivocal case that Brandon Stadium is surplus to requirements”. However, in 2023, all the available research and consultation evidence suggests that speedway is not a viable option, therefore suggesting that the site could in fact be considered surplus to requirements.
 - ◀ It was concluded that speedway viability could not be determined, but then **wyg** has determined speedway viability elsewhere through other studies, making it difficult to understand why it could not be ascertained in this case.
 - ◀ The **wyg** report notes that “new stadiums could potentially be viable, alongside recent closures new ones are also being built and in the pipeline in Yorkshire and Durham”. KKP has found no evidence to support this claim and no facilities have since been provided in either Yorkshire or Durham, with no proposals currently in place. Furthermore, it has been confirmed that the one remaining speedway team in the Northeast – Newcastle Diamonds, went into administration in 2022.
 - ◀ The **wyg** report suggested that alternatives set out by the NPPF need to be considered, with the applicant instead being recommended to explore points B and C of Paragraph 99. In KKP's 'Brandon Stadium – 3G Artificial Grass Pitch Feasibility Study', a viable alternative sports and recreation provision is now clearly outlined alongside a supporting needs assessment evidence base from the emerging Rugby PPS and the current Coventry PPS. This option has the clear potential to meet point C of the NPPF.

National Speedway Stadium – Manchester

- 5.16 The **wyg** report makes it clear that recently opened stadiums, management models and viability should be considered. The only example of a recently opened speedway stadium is the National Speedway Stadium in Manchester following the site's redevelopment in 2016 on the back of capital investment from Manchester City Council. It reportedly cost approximately £7 million to provide the speedway provision and it is likely that this more closely aligns to the costs that would be entailed at Brandon Stadium (rather than the £3.73 million figure alluded to in 2017).
- 5.17 After opening, it was reported that the site's leaseholders failed to meet important requirements tied to its agreement, including the payment of any rent to the Council. This led to Belle Vue Speedway 2017 Ltd taking over the lease; however, the Company went into liquidation and the facility is now being run by GLL under the auspices of the Council's leisure management contract.
- 5.18 It should also be noted that The National Speedway Stadium is part of a wider development which includes a leisure centre and 3G pitch. This in theory makes it more likely to be a viable concern when compared to a standalone speedway facility given that the additional facilities can supplement income. As such, its lack of profitability provides a prominent example of the financial issues associated with speedway provision, even when a facility is well provided for.

BRANDON STADIUM

SPEEDWAY VIABILITY APPRAISAL

Covid-19

- 5.19 Whilst evidence of the impact of fixture/event cancellations due to the Covid-19 pandemic is limited, consultation with club owners and speedway venue operators clearly indicated that speedway and other sports that utilise speedway venues have been and will be further damaged in the resulting economic fallout. It is widely understood that speedway venues operate on the limits of commercial viability and were not prepared for what happened.
- 5.20 Re-developing a speedway facility in the post Covid-19 climate would, in the view of all consultees, represent significant added risk. The fact that venues are closing, and no new ones are opening is further evidence of this.

Impact of Brexit on rider recruitment

- 5.21 For many years British speedway clubs benefited from attracting European talent to come and compete, which helped raise its profile as top riders traditionally hailed from mainland Europe. The UK withdrawal from the European Union has impacted the quality of racing across clubs. In May 2022, Plymouth Live¹⁹ reported that the reduction in talent coming to the country to compete is primarily due to the timescales and costs associated with securing the visas now required by non-UK nationals. It is therefore less appealing for the riders and as such they are staying in leagues on mainland Europe.

Inflation

- 5.22 The challenge of making speedway financially viable has been further exacerbated by the cost-of-living crisis that has impacted the UK from 2022 onwards. Rising inflation will continue to be an impediment to attracting spectators particularly given the predominant demographic of this base which has, arguably, been one of the hardest hit.

Energy costs

- 5.23 Soaring energy prices have also impacted Speedway stadia, although the Energy Bill Relief Scheme (EBRS) did provide support which ran through to the end of March 2023 and limited the impact of price rises. The EBRS was replaced with the Energy Bill Discount Scheme in April 2023. However, despite this, clubs and facilities are still facing mounting costs at a time where, as mentioned above, key operators from the sports consulted confirm that revenue streams are becoming ever more limited in size and scope.

Other considerations

- 5.24 The environmental impact of operational speedway and other motorsports (e.g., stock car racing) is also being questioned, particularly in respect of air and noise pollution. However, very little information has been unearthed, at least in formal terms, and such evidence as there is - is largely anecdotal. This said, KKP's consultation with the operator of the Swindon and Poole speedway facilities identifies that it is a growing concern and is becoming more and more of an issue with residents and campaign groups. There are also concerns especially around noise pollution that can restrict the usage at sites which in turn limits viability. One such example of a Supreme Court case was found in relation to Mildenhall Stadium in Suffolk²⁰.

¹⁹ See Appendix item 1.8 for full article.

²⁰ See Appendix item 1.9 for further detail.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

PART 6: CONCLUSION

- 6.1 Although detailed information in respect of the previous commercial operation at Brandon Stadium is not available, it is clear from the national picture that speedway facilities are struggling and in a state of decline; a position which has worsened in 2023. There is no evidence to suggest that this situation will change in the foreseeable future, so re-developing a track at this moment in time is not considered to be financially viable. This is further evidenced by the issues presently faced at the purpose-built National Speedway Stadium and information available about the closure of Abbeyfield Stadium in Swindon.
- 6.2 For provision to be sustainable, it is considered that both usage and attendance needs to be maximised. However, whilst it is recognised that speedway venues can be used for a variety of activities, it is clear that the same issues it faces also relate to the other sports which use its venues (e.g., stock car racing and greyhound racing). It is therefore likely to be very difficult to achieve at sustainability at Brandon Stadium given that substantially more established venues and clubs are struggling. Furthermore, expert consultees confirmed that with commercial revenue continuing to decrease, even the more popular facilities are facing an uncertain future, especially in the wake of Covid-19 and when considering current cost of living pressures.
- 6.3 In addition, the capital cost outlay required to re-open the venue is unlikely to be deliverable and the same logic applies to replacement provision at an alternative site. It is therefore considered that the re-development of Brandon Stadium is not a viable option.
- 6.4 Based on the above, the speedway provision at Brandon Stadium is not considered to be viable, and it can therefore be argued that the facilities are surplus to requirements (point A of Paragraph 99 of the NPPF). Furthermore, even if this was not the case, an alternative sports and recreational provision development is a more realistic option for the site (point C of Paragraph 99 of the NPPF). Motorsports are a minority sport in terms of participation and the beneficial impact on health and physical activity is limited and less far reaching than other activities. Only one exception needs to be adhered to for planning policy to be met.

BRANDON STADIUM SPEEDWAY VIABILITY APPRAISAL

APPENDIX 1: SUPPORTING EVIDENCE

The following documents and press articles have been used to support the evidence base for this report:

- ◀ 1.1 - Brandon Stadium Independent Review - The full report from WYG is available to read via the Rugby Borough Council Planning Portal: <https://planning.agileapplications.co.uk/rugby/search-applications/>, to access the report type Coventry Stadium into the Location field. Then Select the second application (R18/0186), and from the Documents tab scroll down to 'Miscellaneous Documents', where the document can be found.
- ◀ 1.2 - Needs Assessment for the Arena Essex Development: <https://regs.thurrock.gov.uk/onlineapplications/search.do?action=simple&searchType=Application>, use application reference 18/01671/FUL to access report and supporting documents.
- ◀ 1.3 – Swindon Speedway statement: <https://www.swindon-speedway.com/news.php?extend.3519.1>
- ◀ 1.4 – Express and Star article: <https://www.expressandstar.com/sport/speedway/2023/04/17/wolves-future-in-serious-doubt-as-monmore-green-tenancy-set-to-end/>
- ◀ 1.5 – Guardian article: <https://www.theguardian.com/sport/2019/mar/23/who-haul-speedway-out-of-1970s-back-into-affections-uk-viewing-public>
- ◀ Page 1.6- Spectator article: <https://www.spectator.co.uk/article/why-did-britain-fall-out-of-love-with-speedway/>
- ◀ Page 1.7 - Greyhound Board of Great Britain fixture list: <https://www.gbgb.org.uk/racing/open-races/2022-category-one-schedule/>
- ◀ Page 1.8 – Plymouth Herald article: <https://www.plymouthherald.co.uk/sport/other-sport/brexit-fallout-affecting-quality-speedway-7042536>
- ◀ Page 1.9 – Pinsent Masons article: <https://www.pinsentmasons.com/out-law/news/lawful-noise-from-speedway-track-could-still-be-a-nuisance-to-homeowners-supreme-court-rules>