MOTORSPORT TOURISM CLUSTER STUDY

Discussion Draft

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with funding from the South East of England Regional Development Agency

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TOURISM
SOUTH EAST

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EXECUTIVE SUMMARY

1. PURPOSE AND BACKGROUND

- The aim of this study is to bring together the knowledge base needed to inform strategies to:

  - Increase market share of domestic & overseas tourism through product development e.g. promote 'family entertainment experience'.
  - Develop strong motor sport-related products through partnership working using the 'cluster approach' as a way of strengthen competitive capability.
  - Re-position "motor sport entertainment" as a tourism product, which brings added value earnings to the local area.

- This study builds on the work completed as part of the *Motorsport Valley Tourism Programme*, funded by the East Midlands Development Agency and delivered by the Motorsport Industry Association (MIA).

- Desk-top research and information from the Motor Sport Association (MSA) and Motorsport Industry Association (MIA) was gathered to build a picture of motor sport tourism activities in the region. Interviews were also carried out with motorsport venues and a sample of tourism businesses. To provide information on the 'visitor experience' mystery shopping exercises were carried out at two circuits.

2. INDUSTRY PROFILE OF MOTORSPORT TOURISM IN THE SOUTH EAST

- Motor sports geographical heartland covers four English regions: the East, the South East, West and East Midlands. The geographical clustering of high performance engineering, electronics, R&D, circuits and supporting service industries, has become known as 'Motorsport Valley'. The Valley supports approximately 50,000 jobs in around 4,000 companies worth £4.6 billion to the national economy.

- The South East region is the largest contributor, with around 60% of companies located on the region. Their location in the region is not incidental but the outcome of a long lineage of engineering innovation and collaboration.

- There are 16 motor racing circuits in the UK. Four of these, Brands Hatch, Goodwood, Thruxton and Lydden are located in the South East.

- In addition to the circuits, there are a number of smaller speedways offering racing events and experience days, activity centres and clubs offering off-road driving experiences and Karting.

- Activities of motor racing circuits extend beyond the staging of motor races. Supplementary activities are the major source of revenue for most-racing circuits. Such activities include the provision of the circuit for testing and practice by motor-racing teams and clubs, the hire of the circuit to racing clubs to stage their own events and championships, operating racing driving and riding schools, staging track days and 'experience days', and offering corporate hospitality services.

- Visitors can also chart the history of motor sport and view collections of vintage and classic cars in one of the many motor museums located in the region. A number of the museums are also the focus for events such as club rallies.

- The South East is also home to a wide variety of motor sport clubs and associations. These range from national competition organisers such as the Formula 3 association, to the national governing body of all motor sport activity, The Motor Sports Association

3. CONSUMER PROFILE

- The group most likely to watch motor sport either as a spectator or on TV are young men, generally from affluent neighbourhoods. Significant levels of interest are also shown by other age-groups. Around two-fifths of adults in the 20-24 to 45-54 age groups reported to be followers of the sport.

- Of the main racing events, Formula One is the most popular branch of motor sport among the British public. The second most popular motor sport is rallying, followed by superbikes and the touring car races.

- For international or certain high-profile spectator events, the geographic market tends to be both national and international, but regional or local for national championships or smaller events. Participatory experiences for enthusiasts such as track days are likely to draw on a national catchment area, whereas activities for one-off customers such as a recipient of a Red Letter gift voucher are likely to draw from a local or regional market.

- Whilst the majority of visitors will be travelling to and from an event/activity on the same day, many others will be staying overnight. According to the economic impact study of the 2002 Grand Prix at Silverstone, of the 116,000 visitors attending, 44% were staying in accommodation within 50 miles of Silverstone Circuit.

- Visitors to motor sport events are high spenders. The economic impact assessment of the 2002 Grand Prix found that on average, each person spent £51.35 per day on food, drink and merchandise on site and a further £31.75 per day on accommodation, food, drink and shopping in the local area. The overseas market is particularly important from an economic perspective as they are one of the highest spending groups, on average spending £131 per day on site (excluding cost of ticket) and a further £118 off-site.

- Women and the family market are in general under-represented. The machismo image has been a major barrier to women's involvement. However there are signs of change.

More women are entering motor sports as drivers, and recent initiatives such as the Formula Women championship and the British Women Racing Driver's Club (BWRDC) are beginning to raise the profile of female drivers.

- Demographic factors are generally favourable to the future growth of the market. Over the past few years, there has been a growth in the number of 15-24 old males. This group are most likely to be interested in watching motor sport either as a spectator or on TV. A positive trend for historic and vintage events such as the Goodwood Revival and vintage and classic car rallies is the growing proportion of the population accounted for by the 55-64 year olds, the so-called 'grey market' who tend to be more affluent than the average and have more leisure time to spend visiting events.

- Increasing participation among some lifestyle groups in extreme sports from white water rafting to bungee jumping offers another growth potential for opportunities to develop motor sport tourism activities that offer a measure of 'controlled risk'.

4. MOTOR SPORT CLUSTERING

- The tourism benefits which motor sport leisure events and activities could provide are being lost or are not being maximised because the linkages between the motor sport and tourism sectors are not well established. An apparent lack of integration and cohesiveness between motor sport venues and tourism businesses has been identified as one of the major impediments to the growth of motor sport tourism

- The study found few examples of joint working between motor sport and tourism businesses. Many motor sport businesses did not see that they had a role in the provision of information to visitors regarding accommodation for example, whilst others felt that they did not have the resources to do so.

- A parochial culture pervades motor sports with many motor sport venues not seeing themselves as part of a broader motor sport tourism industry. At the same time many tourism related businesses fail to see that they stand to significantly benefit from motor sport events resulting in potential lost opportunities.

- The study found that motor sport tourism is lacking many of the vital elements found in a cluster but there is great potential for development. The region is already well recognised for its concentration of motor sport venues, companies and heritage, and is part of the industry cluster known as the 'Motor sport Valley'. Motorsport Valley offers an already available brand to capitalise the tourism strengths of motor sport. Motor racing circuits are also aware that they are facing increasing competition from other leisure options and that they need to innovate if they are to attract new custom. This opens the path for regional tourist boards and destination management organisations to work with circuits to maximise visitation and yield by developing appropriate tourism packages.

- It is felt that a number of smaller, more locality based cluster groups will be effective in maximising and spreading benefits throughout the Motorsport Valley

5. NEXT STEPS

- Future co-operation and joint working will only arise if the parties involved can see the mutual benefits. Central to this will be raising the level of awareness of the benefits to be accrued among the industry. Proposals will require concerted efforts of a range of agencies if they are to be successfully implemented.

- Further funding from Government agencies will be required to drive forward change, whilst other agencies such as the MSA need to contribute towards resources such as freeing up staff time to focus on motor sport tourism actions.

- Areas which need further work are:

  - Developing a strategic and coordinated approach.
  - Communication and Information sharing.
  - Marketing and brand management.
  - Service quality and value for money.

PREFACE

This study builds on the work completed as part of the Motorsport Valley Tourism Programme, funded by the East Midlands Development Agency and delivered by the Motorsport Industry Association (MIA). This 12 month programme, which ended in 2003, involved enhancing the ‘Motorsport Valley’ brand by promoting the industry to a wider audience with the aim of increasing visitor numbers and delivering improved earning for motor sport and hospitality businesses. Two key outcomes of the programme were a Motorsport Valley Tourism map to allow for itineraries to be developed for visiting a variety of motor sport attractions and a website which provides information on events.

This study has been supported by SEEDA and focuses on strategies to maximise tourism earnings from Motorsport events and activities. The findings of this study will be shared with the other regions of the Motorsport Valley and will assist in informing an action plan to take forward some of the ambitions of the *Motorsport Valley Tourism Programme* which have not yet been realised.

1. INTRODUCTION

Motor sports geographical heartland covers four English regions: the East, the South East, West and East Midlands. The geographical clustering of high performance engineering, electronics, R&D, circuits and supporting service industries, has become known as 'Motorsport Valley'. The Valley supports approximately 50,000 jobs in around 4,000 companies worth £4.6 billion to the national economy[1].

The South East region is the largest contributor, with around 60% of companies located on the region[2]. Their location in the region is not incidental but the outcome of a long lineage of engineering innovation and collaboration.

1.1 Tourism benefits

The economic benefits to the region extend beyond the motor sport industry. Motor sport exists essentially to provide entertainment for the public and what is often overlooked is the contribution made by tourism related expenditure. Motor sport events and activities play an important role in generating tourism and leisure day visits to the area. The region has a grand prix standard motor racing circuit at Brands Hatch and other racing circuits at Goodwood and Thruxton which host premier speed racing events. A number of other professional races and rallies also take place across the region.

Other visitors come to take part in novelty sports such as karting, drag racing and off-road driving at one of the many speedways, activity centres and motor sport clubs in the region.

Visitors often require other services such as somewhere to stay, somewhere to eat/drink and local transportation to get them from A to Z. Such needs provide potential opportunities for a host of other businesses. As an example, a recent study of the economic impact of the 2002 Grand Prix at Silverstone estimated that putting aside expenditure on tickets and on-site catering, an additional £5.1m flowed into the area and neighbouring regions through expenditure on accommodation and other goods and services[3].

In order to maximise the tourism benefits that flow from motor sport events and activities in the region, there needs to be joint working between the motor sport venues and tourism-related businesses. However, few established linkages exist between motor sport venues such as the motor racing circuits and tourism businesses. Tourism considerations tend to play a minor role in the staging of races and other motor sport activities, as these are organised as purely sporting events. As long as tourism is a fringe consideration, fully capturing the business opportunities associated with motor sport tourism will remain difficult.

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[1] *Promoting the Valley: Motorsport Pathfidner Report, 2002*. Motorsport Industry Association.
[2] *Motor Sport Overview,* South East of England Development Agency.
[3] *The Economic Impact of the 2002 FIA Foster's British Grand Prix*, July 2003

A regional *motor sport tourism cluster* provides a model for building linkages between the sectors. This cluster will be functionally different to the motor sport industry cluster as what links businesses together here first and foremost is the need to serve the visitor. This study assesses the potential for a motor sport tourism cluster to be developed in the region.

Whilst the focus of this study is the South East, the findings of the study will be shared with the other regions and will assist in informing an Action Plan which will involve and benefit the four regions of the Motorsport Valley.

1.2 Background to Study

This study has its genesis in a workshop arranged by the Motorsport Industry Association (MIA) to assess strategies to raise the profile of motor sport tourism. The workshop formed part of the activities of *Motorsport Valley Tourism Programme*. The workshop was attended by motor sport venues, local authorities, regional tourist boards and regional development agencies. One central issue emanating from workshop discussions was that the tourism benefits which motor sport leisure events and activities could provide are being lost or are not being maximised because the linkages between the motor sport and tourism sectors are not well established.

This study assesses the extent to which a regional cluster provides the model for building these linkages at the local level.

1.3 Aims and Objectives

The overall aim of the study is to assess current linkages, if any, between motor sport venues and related attractions and tourism businesses in the region and seeks to provide a critique of the cluster model as a driver of motor sport tourism development.

Key objectives were to gather data that would enable the following:

- Identify infrastructure needs for motor sport tourism.
- Identify visitor needs to enhance the visitor experience.
- Assist in developing a strategic approach to motor sport tourism development.

A number of study areas were identified.

Study Area 1: Market analysis to identify existing and potential markets.

Study Area 2: Scoping exercise to establish the nature and associated infrastructure of the motor sport tourism cluster. This has involved identifying all motor sport tourism activity in the region and undertaking audits of tourism related businesses.

Study Area 3: Mystery shopping exercise to evaluate the quality of services provided at circuits.

Study Area 4: Exploration of the interactions of motor sport tourism attractions with other businesses in the cluster. This has involved identifying networking and alliances between the motor sport sector with other tourism businesses such as accommodation providers.

1.4. Methodology

Desk-top research and information from the Motor Sport Association (MSA) and Motorsport Industry Association (MIA) was gathered to build a picture of motor sport tourism activities in the region.

Mystery shopping exercises were carried out at two circuits.

Interviews were also carried out with Motorsport operators and a sample of tourism businesses (see Appendix 1 for details).

1.5 Definitions

Motor Sport: In this study 'motor sports' refers to any two-and four-wheeled sports staged at venues licensed by the appropriate governing body in the UK. The main types of motor sport included are car, motorcycle, truck racing and rallying, which are held on a mixture of circuits, off-road sites (i.e. forests), purpose built facilities and closed public roads. Other smaller branches of the sport include rallycross, karting and drag racing.

Motor Sport Tourism Part of the broader concept of 'sport tourism', Motor sport tourism involves a combination of sporting activities and travel. There are generally two broad categories:

Motor sport participation travel
Travel from home involving a day visit or overnight stay for the purpose of participating in a motor sport event/activity.

Motor sport spectatorial travel
Travel from home involving a day visit or overnight stay for the purpose of spectating a motor sport event/activity.

Whilst the emphasis in the above definition is on the ‘sport’ element of motor sport tourism, it should be noted that there are also a number of dedicated motor museums which are key attractions in themselves. In view of this, visits to motor museums have also been included.

1.6 Outline of report

A profile of the industry is examined in Section 2 of this report. This provides a picture of the various motor sport leisure activities that can be enjoyed across the region. Drawing on local surveys provided by individual circuits and a literature review, an examination of the consumer profile and a discussion of the future growth of the sport follows in Section 3.

Section 4 focuses on the meaning of industry clustering and what is needed to make it successful. One vital ingredient is being in an environment in which a number of different and complimentary businesses operate as this provides competitive advantages. The extent to which motor sport venues operate in a 'proximate environment' is assessed in Section 5 of the report. This involves an audit of tourism related businesses within a certain radius of the motor sport venue. In total 7 venues were selected for the audit.

A summary of the studies findings and recommendations for actions are presented in the concluding Section 6 of the report.

1.7 Acknowledgements

We would like to pay a special thanks to the motor sport venues who participated in this study. We would also like to thank Mark Hughes at International Motor Sport Limited, a subsidiary company of the Motor Sport Association who provided a wealth of background information which helped to guide this study and Jonathon Webster at the Motorsport Industry Association who provided much of the industry information.

2. INDUSTRY PROFILE OF MOTORSPORT TOURISM IN THE SOUTH EAST

2.1 Introduction

A wide range of motoring events and activities take place in venues and along selected open routes across the South East. Premier events include the World Super Bikes, the British Touring Car Championship, and the Festival of Speed and Revival Meeting.

Other motoring events, both professional as well as for public participation are offered by a number of speedways, activity centres and karting clubs. The following sections will provide an overview of the leisure and entertainment side of the motor sport industry.

2.2 Motor racing circuits

There are 16 motor racing circuits in the UK. Four of these, Brands Hatch, Goodwood, Thruxton and Lydden are located in the South East.

Table 1: Location of major motor sports circuits, 2003

Circuit	Location
Brands Hatch	Kent, England
Cadwell Park	Lincolnshire, England
Castle Combe	Wiltshire, England
Croft	County Durham, England
Donington Park	Leicestershire, England
Goodwood	West Sussex, England
Kirkistown	County Down, Northern Ireland
Knockhill	Fife, Scotland
Lydden	Kent, England
Mallory Park	Leicestershire, England
Oulton Park	Cheshire, England
Pembrey	Dyfed, Wales
Rockingham Motor Speedway	Northants, England
Silverstone	Northants, England
Snetterton	Norfolk, England
Thruxton	Hampshire, England

Source: Motorsport Industry Association

Table 2 provides a summary of the leading operators, as well as some of the smaller players.

Table 2: Leading operators of motor sports venues, 2003

Company	Circuit(s)	Number of events per annum	Main events
Motor Sport Vision	Brands Hatch, Oulton Park, Snetterton, Cadwell Park	Not confirmed	BTCC (5 meetings), World Superbikes (2 meetings), British Superbikes (7 meetings)
Siverstone Motorsport Ltd	Siverstone	Not confirmed	British Grand Prix,
Clear Channel Communications	Donington Park	29	British Motorcycle GP, BTCC, British Superbikes, DTM, FIA GTs and ETC
Goodwood Road Racing Co.	Goodwood	2	Festival of Speed, Revival Meeting
BARC	Thruxton, Pembrey	34	BTCC, British Superbikes, Truck Racing, Kart GP
Rockingham Motor Speedway Ltd	Rockingham	16	BTCC, British Superbikes
Knockhill Racing Circuit Ltd	Knockhill	20	British Superbikes
Croft Classic & Historic Motor sport	Croft	18	BTCC
Mallory Park (Motor sport) Ltd	Mallory Park	40	Post-TT meeting
Castle Combe Circuit	Castle Combe	10	Formula 3/GTs

Source: Motorsport Industry Association

In 2004, Motor Sport Vision bought Brands Hatch, Oulton Park, Snetterton and Cadwell Park from the Interpublic Group of Companies who had previously owned all four circuits plus Silverstone. As with its predecessor it is the most dominant player, due both to the number of circuits it operates and also the fact that its circuits hold many of the most prestigious events, such as the UK rounds of the Formula 1 World Championship and two rounds of the World Superbike Championship.

Silverstone continues to host the premier British Grand Prix and is owned by Silverstone Motorsport Ltd.

Goodwood hosts just the two meetings every year but these are very big events, with substantial attendance (each runs over three days) and relatively high admission prices.

Goodwood is also the fastest-growing operator in terms of admissions; admissions increased by 24% between 1998 and 2002 (see Table 3 overleaf).

Table 3: Leading circuit operators in the motor sports sector in terms of admissions, 1998-2002

	1998		2000		2002		% change
	000	%	000	%	000	%	1998-2002
Interpublic Group *	1,170	58	1,049	56	1,117	52	-5
Clear Channel Communications	250	12	249	13	226	10	-10
Goodwood Road Racing Co.	176	9	174	9	219	10	+24
Total	2,003	100	1,884	100	2,155	100	+8

** Data precedes the change of ownership to Motor Vision and Siverstone Motorsport Ltd*

Source: Mintel, Motor Sport Leisure Intelligence Report 2003

2.3 Motor sport entertainment

Activities of motor racing circuits extend beyond the staging of motor races. Supplementary activities are the major source of revenue for most-racing circuits. Such activities include the provision of the circuit for testing and practice by motor-racing teams and clubs, the hire of the circuit to racing clubs to stage their own events and championships, operating racing driving and riding schools, staging track days and ‘experience days’, and offering corporate hospitality services. The circuits are not the only venues. There are several stadiums and speedways offering activities such as karting and off-road driving.

For the purpose of this study there are four main markets of interest. These are briefly outlined below.

2.3.1 Spectator events

At the pinnacle of motor sport entertainment are the motor racing events. There are a variety of championships, series and one-off motor racing events. These are held under the auspices of relevant governing bodies. National championships include the British Superbikes, the British Tour Cars Championships (BTCC) and PowerTour (comprising Formula Three and the British GT championships). International races include the World Superbikes, the Formula One Grand Prix and Motorcycle Grand Prix, the Fedex CART championship, FIA Supertouring and FIA GT. In addition to championships, some one-off events are staged. The largest examples are the Goodwood Festival of Speed and the Cors Historic Festival (held at Rockingham).

2.3.2 The track-hire market

‘Track days’ involve participatory events involving enthusiasts and professionals using their own vehicles. At track days, circuits are opened to members of the public to drive their own vehicles around a circuit. The drivers are subject to safety restrictions and racing is forbidden.

Track days are often organised for particular classes and types of vehicles and participants are usually divided into groups of similar speed and experience for safety reasons. Track days are usually organised by independent track day organisers, who hire the circuit for the day and then sell places to the public. The organisers provide on-the-day briefings and are responsible for ensuring that participants obey safety measures.

2.3.2 The experience market

These are participatory events typically involving one-off or occasional consumers who are provided with vehicles. Customers have the opportunity to engage in activities such as driving racing vehicles or high-performance cars on tracks after tuition. These activities are usually run under the auspices of a ‘racing school’. Activities usually only last part of a day. There are often many off-track activities run at the same venues, such as karting, four-wheel drive off-road vehicles and rallying schools. The businesses that offer experience products may be owned by the circuit or may be independent organisations that also hire the track. A number of speedways and activity centres also offer driving experiences (see Table 4).

These organisations sell their products direct to members of the public. However, some day business is obtained through gift catalogues. Companies such as Red Letter Days produce catalogues containing a wide variety of activity days, such as flying lessons, white-water rafting, powerboats and driving military vehicles. Each activity has a voucher price. A voucher is purchased which can then be redeemed against one of these activities. Consequently, vouchers are suitable as gifts where the recipients can choose which activity they would like to participate in. Racing experience vouchers are also available in some high street shops as packaged gifts.

2.3.4 Corporate hospitality and corporate events

Corporate events at circuits fall into three categories. First, companies use spectator events as occasions to provide corporate hospitality for clients and staff: typically, corporate suites or boxes will be booked for events, although these facilities may be hired for the season or longer, and possibly sublet. Second, motor-racing circuits may be used for corporate events, where the facilities offered for experience days are used for corporate teams to reward or incentivise staff and encourage team building. Third, facilities at circuits may be used for conferences, receptions, training courses and so on. These activities are often combined with corporate hospitality or experience events to generate a more entertaining day.

2.4 The market in the South East

Table 4: Motor sport Tourism Venues

Name of Venue	Type of venue	Type of events	County
Brandshatch	International GP Circuit	GP's, car & motorbike races	Kent
Thruxton Circuit	International Race Circuit	Car & motorbike races	Hampshire
Goodwood Circuit	International Race Circuit, special major events	Goodwood Revival, Festival of speed	West Sussex
Lydden Hill Circuit	National Race Circuit	National race meetings, special events	Kent
Brooklands	Historic Race Circuit and Museum	Special events from clubs and rallies	Surrey
Ringwood Raceway	Oval Racing Circuit. Largest off Road venue in Europe	Short circuit racing, stockcar racing, oval racing + guest formulas	Hampshire
Arlington Stadium	Stadium	Speedway/Stock cars/banger racing	East Sussex
Oxford Stadium	Stadium and Karting Track	Speedway + public karting	Oxfordshire
Poole Stadium	Stadium	Speedway	Dorset
Leisure Pursuits Off-road Centre	Off Road Activity Centre	Tank driving, Monster trucks, quad bikes, rally driving	West Sussex
Thruxton Motor sports	Activity Centre	Public circuit driving, Karting, Off road driving	Hampshire
Buckmore Park Kart Circuit	Karting and Off Road Centre	Corporate and Competition Karting + off road activities	Kent
Bayford Meadow Kart Circuit	Outdoor Karting	Competition and public karting	Kent
Camberley Kart Club	Outdoor Karting	Competition and public karting	Surrey
Challenger Karting	Outdoor Karting	Competition and public karting	Surrey
Clay Pigeon Kart Club	Karting Race Circuit	Competition and public karting	Dorset
Daytona Milton Keynes	Outdoor Pro Karting Track	Competition and public karting	Buckinghamshire
Daytona Sandown Park	Outdoor Pro Karting Track	Competition and public karting	Surrey
Fastrack indoor Karting	Indoor Karting	Competition and public karting	Buckinghamshire
Forest Edge Kart Club	Outdoor Karting	Competition and public karting	Hampshire
Lydd International Raceway	Outdoor Karting	Competition and public karting	Kent
Shenington Kart Circuit	Outdoor Karting	Competition and public parting	Oxfordshire
Wessex Raceway	Indoor Karting	Corporate and competition karting	Wiltshire
Campbell Circuit	Karting Club and Museum	Public karting	East Sussex
Filching Manor Motor Museum	Kart Track and Museum	Public karting	East Sussex
Go Karting for fun, Aldershot	Indoor Karting	Public karting	Hampshire
Go Karting for fun, Andover	Indoor Karting	Public karting	Hampshire
Go Karting for fun, Crawley	Indoor Karting	Public karting	West Sussex
Go Karting for fun, Eastleigh	Indoor Karting	Public karting	Hampshire
Go Karting for fun, Gosport	Indoor Karting	Public karting	Hampshire
Knock Hatch adventure Park	Outdoor Karting	Public karting	East Sussex
Premier Karting	Indoor Karting	Public karting	Berkshire
Trax Indoor Karting	Indoor Karting	Public karting	East Sussex
Gurston Down	Hill Climb and Sprints	British Hill Climb Championship	Dorset
Rushmoor Arena	Open Air Arena	Rally stages	Hampshire

Source: TSE Audit

Table 4 provides an overview of the range of motoring experiences found in the region. In addition to the circuits, there are a number of smaller speedways offering racing events and experience days, activity centres and clubs offering off-road driving experiences and Karting.

The region is also the location for a number of outdoor spectator based races such as the Tempest South of England Rally and the Brighton Speed Trials. Table 5 below provides examples of the type of rallies which attract spectators to the region.

Table 5: Motor sport Non—Permanent Venues

Rally / event Name	Organisers	Type of rally / event	Route
Brighton Speed Trials	Brighton and Hove Motor Club	Sprinting / racing for classic cars and bikes + modern cars	Brighton sea front
London to Brighton Veteran Car Run	Motor sports association	Veteran cars and bikes (average age 100 years)	Hyde Park; London to Maderia Drive, Brighton
Rally Sunseeker 2004	Southern car club ltd and Croydon and district motor car club	Kumho Tyres National Rally Championship	Bournemouth Pier and Gardens, Wareham Forest, Ringwood
Tempest South of England Rally	Sutton and Cheam motor club, Middlesex County Automobile club, Hart Motor club	Final round of the British Rally Championships	Around Aldershot, Yateley and Rushmoor
The Rally of Kent	Bexley light car club, Sevenoaks and district MC and Maidstone mid Kent MC	Southern association championship	(Main area) Kent County Showground, Maidstone

Source: TSE audit

Visitors can also chart the history of motor sport and view collections of vintage and classic cars in one of the many motor museums located in the region. A number of the museums are also the focus for events such as club rallies.

Table 6: Motor Museums

Name of Venue	Type of museum	County
A.R.E. Classic Bike Collection	Classic Motorbikes	Surrey
Bentley Wildfowl and Motor Museum	Veteran, vintage and classic cars	West Sussex
Brattle Farm Museum	Vintage cars and bikes + club rallies	Kent
Breamore Countryside Museum	Rural and country + club rallies are encouraged	Hampshire
Brooklands Museum	Worlds first purpose built track, Motor sport + club events	Surrey
Brooklands Vintage motor company	Private collection of vintage to F1 cars. Available for club functions	Dorset
C.M. Booth Collection of Historic Vehicles	Small collection of antique cars and bikes	Kent
Canterbury Motor Museum	Private collection of vintage Cars and Bikes	Kent
Chiltern Museum of motoring	Small collection cars	Buckinghamshire
Dover Transport Museum	Vintage Cars, Bikes and Buses	Kent
Dunsfold Collection of Land Rovers	Worlds largest collection of land rovers + club rallies	Surrey
Filching Manor Motor Museum	Exclusive private collection + Kart Track	East Sussex
History of wheels Motor museum		Berkshire
Leonardslee Gardens	Victorian vehicles + motor club rallies	West Sussex
Milestones	History museum with vehicle and memorabilia collection + club rallies	Hampshire
National Motor Museum, Beaulieu	National Motor museum + club rallies and special events	Hampshire
Ramsgate Motor Museum	Classic cars and motorcycles	Kent
Sammy Miller Motorcycle Museum	Museum + rallies and special events	Hampshire
West Wycombe Motor Museum		Buckinghamshire
Williams Grand Prix Collection	History of Williams F1 cars	Oxfordshire

Source: TSE audit

Finally the South East is home to a wide variety of motor sport clubs and associations. These range from national competition organisers such as the Formula 3 association, to the national governing body of all motor sport activity, The Motor Sports Association. Others include regional associations such as the Association of Central Southern Motor sport Clubs, motor sport promoters such as Spedeworth International and membership organisations for those hosting motor sport activity such as the Association of Motor Racing Circuit Owners.

There are also a number of smaller motor sport clubs which specialise in a certain area of motor sport activity who hold rallies and meetings throughout the year in the region.

Table 7: Motor sport Clubs and Associations

Organisation Name	Activities	County
600 Racing Europe	Organise legends car racing	Surrey
All Wheel Drive Club	Organise off road racing and information provision	East Sussex
Association of Central Southern MC	Regional motor sport association. Runs Championships.	Hampshire
Association of motor racing circuit owners	Organise race meetings at 18 circuits nation-wide	Hampshire
British off-road Driving Association	Membership organisation for off road centres	Hampshire
British Racing and Sports Car Club	Hold race meetings throughout the year at 14 circuits nation-wide	Kent
Formula 3 Association	Organise the Formula 3 national Championship	Hampshire
Formula 6 Association	Organise the South East Karting Championship	Surrey
Motor sports Association	Governing body of motor sport in UK	Buckinghamshire
Octagon Motor sports	Owners, promoters of Brands Hatch	Kent
Spedeworth International	Promoter of short circuit racing	Hampshire
Sports 2000 racing car club	Membership organisation raising profile of SRCC racing	Kent
The British Automobile Racing Club	Owners, promoters of Thruxton Circuit	Hampshire
Examples of motor sport clubs in the region		
Bux 4x4	Club for 4X4 owners and enthusiast in Buckinghamshire	Buckinghamshire
Club off road Europe	Club for off road enthusiasts in Kent.	Kent
I.O.W 4X4	Club for 4X4 enthusiasts on the I.O.W	I.O.W
Southern Car club	Organise rallies, trails and club events	Surrey
The Hants and Berks Car Club	Low costs events where members can use own cars	Hants + Berks

Source: TSE audit

3. CONSUMER PROFILE

3.1 Introduction

An initial review of secondary sources revealed a number of major data gaps. There are no published official statistics on the number of UK and overseas visitors attending motor sport events. Research on consumers who follow motor sports are few and far between. Only Mintel has undertaken domestic consumer research in motor sport as part of their Leisure Intelligence series of reports. Some useful insights into the consumer markets were drawn from a report by the Competition Commission on the merger between Octagon and the BRDC[4].

Other sources, which are not publicly available, are surveys undertaken by operators themselves.

In view of the paucity of data, this section of the report draws heavily from the 2003 Mintel report on Motor Sport, the Competition Commission report, and survey findings provided by circuits.

3.2 'Toys for the boyz'!

It is widely perceived that motor sports is a heavily male orientated sport. Circuit operators reported that most of their visitors tend to be high earning males in the 35-45 age group. Socio-economic profiles and ages tend however, to change with events; super bike and truck races tend to involve more C1 and C2 groups, with motorcycle racing attracting younger men.

The majority of circuit operators painted a picture of the 'typical' visitor which goes as follows: family of four visit the area and stay for a short break, father arrives at the event with the kids whilst wife pursues other activities such as shopping or visiting friends and relatives.

This consumer profile is supported by Mintel consumer surveys. A survey of 2,000 members of the public found that the group most likely to watch motor sport either as a spectator or on TV are young men, generally from affluent neighbourhoods. Significant levels of interest are also shown by other age-groups. Around two-fifths of adults in the 20-24 to 45-54 age groups reported to be followers of the sport (see Table 8).

[4] *Octagon Motorsports Limited and British Racing Drivers Club Limited: A report on the merger situation.* Competition Commission 2001. Since 1999 Octagon has been a subsidiary of the Interpublic Group of Companies Inc of the USA. The Competition Commission report addressed the acquisition by Octagon of assets of the British Racing Drivers Club Limited (BRDC).

Table 8: Interest in Motor Sport

	All regular watchers of motor sports	All non-watchers of motor sports
	%	%
All	41	59
Men	55	45
Women	27	73
15-19	61	39
20-24	43	57
25-34	45	55
35-44	40	60
45-54	43	57
55-64	37	63
65+	29	71
AB	38	62
C1	42	58
C2	47	53
D	40	60
E	30	70
ACORN categories:		
A - Thriving	42	58
B - Expanding	45	55
C - Rising	42	58
D - Settling	41	59
E - Aspiring	39	61
F - Striving	37	63

Source: Mintel, Motor Sport Leisure Intelligence Report 2003

Of the main racing events, Formula One is the most popular branch of motor sport among the British public. The second most popular motor sport is rallying, followed by superbikes and the touring car races (see Table 9).

Formula One is the only branch of the sport which attracts a significant proportion of women. It has a broad appeal by age group, peaking among 45-54 year-olds and 25-34 year-olds but generally higher than average among 15-19 year-olds. By socio-economic group, there is a peak in interest among AB consumers, and also among those from the C2 category.

In terms of social groupings, interest in Formula One peaks among consumers from the no family lifestage group, with significant levels of interest among family and empty nester households located in the most affluent ACORN areas - Thriving and Expanding.

Rallying also has strongest interest among men. It also has a broad appeal in age terms, appearing to peak slightly among those from the youngest 15-19-year-old age group and also the 25-34 age group. The appeal of rallying is consistent among most lifestage groups, only falling off among those from the empty nester category. Other peaks are evident among those living in ACORN Aspiring and Settling neighbourhoods.

Table 9: Interest in specific branches of motor sport

	Formula 1/ Grand Prix racing	Rallying	Superbike motorcycle racing	Touring Cars	Grand Prix motorcycle racing	Sports car racing*	Rally-cross*
	%	%	%	%	%	%	%
All	33	15	12	8	7	5	5
Men	43	22	18	13	10	8	8
Women	23	7	7	3	4	3	2
15-19	45	21	20	15	11	6	6
20-24	30	18	14	9	5	5	7
25-34	34	21	14	9	8	5	5
35-44	33	14	11	6	8	5	4
45-54	36	14	14	11	8	6	6
55-64	31	10	12	6	8	5	5
65+	26	8	6	4	5	4	3
AB	35	13	7	9	6	6	3
C1	34	14	12	6	7	3	4
C2	37	17	15	10	8	5	7
D	30	18	17	10	9	6	6
E	22	9	10	5	6	5	5
Lifestage:							
Pre-/no family	38	22	16	12	8	7	6
Families	31	14	12	7	8	4	4
Empty nester	34	11	12	8	7	5	6
Retired	26	8	6	4	5	4	3
ACORN categories:							
A - Thriving	34	15	14	10	9	6	4
B - Expanding	38	12	12	9	5	5	5
C - Rising	29	14	9	7	8	4	3
D - Settling	33	16	11	8	7	5	5
E - Aspiring	31	16	10	7	6	6	4
F - Striving	29	13	14	6	8	4	7

Source: Mintel, Motor Sport Leisure Intelligence Report 2003

Superbikes appeal to younger and middle-aged consumers. Superbike racing has a broad appeal by lifestage group, with a slight bias towards consumers from the empty nesters/no family category. Other peaks are evident among those from the Expanding and Aspiring ACORN districts.

The touring car races generate a higher level of interest among consumers from pre/no-family category. Other peaks are found among those living in the most affluent Thriving and Expanding ACORN areas. It has a strong bias in interest towards men. By age, interest peaks among 15-19 year-olds and the 45-54 age group.

Interest in Grand Prix motorcycle racing differs quite markedly by age, with greater interest among older consumers, peaking among 45-54-year-olds. Interest is also higher among respondents from the empty nesters/no family lifestage group and the Expanding ACORN neighbourhood.

No clear trend emerges for sports car or GT Racing, apart from a bias in interest from those in the Expanding ACORN areas. Sports car racing appears to have a broad appeal among all the demographic groups, as does GT racing. By age, there seems to be a peak in interest in both categories among 45-54-year-olds.

There are no notable peaks in the appeal of rallycross, indicating that it has a broad appeal to most types of consumer. Rallycross has less of a pronounced bias towards men than some of the other forms of motor sport and has an even spread of interest among all age groups.

3.3 Visitor expenditure

The significance of motor sport tourism needs to be considered against the high-spend nature of some branches of the sport. The price of a ticket to the British Grand Prix has been rising strongly during the past five years to reach its present level of £115 for an adult general admission (i.e. not including any form of seating, such as a grandstand). For a couple, a trip to the British Grand Prix on race day would therefore cost a minimum of £230.

The economic impact assessment of the 2002 Grand Prix at Silverstone found that on average, each person spent £51.35 per day on food, drink and merchandise on site and a further £31.75 per day on accommodation, food, drink and shopping in the local area. In total around £34.7 million was generated through the sale of tickets, catering and merchandise at the event and a further £5.6 million poured directly to the local area[5] through visitors spending money on accommodation, shopping and food and drink (see table 12).

The overseas market is particularly important from an economic perspective as they are one of the highest spending groups, on average spending £131 per day on site (excluding cost of ticket) and a further £118 off-site.

Large spectator events like the Network Q Rally which takes place on public roads along designated routes have a greater impact on the host economy as apart from expenditure on tickets nearly all other spend (i.e. parking, lodging, food, drink, and retail) benefits local businesses. For example, during the 1998 Network Q Rally week most hotels in the surrounding area reported room occupancy to be 100%. Restaurants, petrol stations, food stores, and other businesses in the local areas reported that business was up, hours were extended and extra part-time staff were employed.

It is estimated that around 60% of the £11.1 million spent by spectators during the Network Q Rally week was by non-local visitors, thereby generated £6.7 million *new money* for the local economy.

[5] In the report, The Economic Impact of the 2002 FIA Foster's British Grand Prix, 'local area' is defined as that within a 50 mile radius of Silverstone Circuit. Additionality and displacement effects have been accounted for.

Table 10: Economic impact by sport

Event	No. of Spectators	Spectator Expenditure £m	UK FTE Jobs
British Grand Prix 2002	122,200	£34.7m	1,148
British Grand Prix 2001	141,752	£41.4m	1,332
Network Q Rally of Great Britain 1998	134,921	£11.1	-

Source: Report of the Motorsport Competitiveness Panel, The Economic Impact of The Network Q Rally of GB

3.4 Where are visitors coming from?

Research conduced by the Competition Commission found that in general for international or certain high-profile spectator events, the geographic market would be both national and international, but regional or local for national championships or smaller events. Participatory experiences for enthusiasts such as track days are likely to draw on a national catchment area, whereas activities for one-off customers such as a recipient of a Red Letter gift voucher are likely to draw from a local or regional market.

Circuit operators contacted for this study indicated that there are a hard core of fans who will follow their chosen driver/team around the UK and also abroad. Distance was thus not a deterrent to travel for this group. The catchment depends on the nature of the races and activities undertaken. A significant stream of visitors to one of the motor sport activity centres in West Sussex come from Wales as the type of off-road driving experience it offers is not found in Wales.

The volume of international visitors changes with the nature of events and branch of motor sport in question. Some 5% of visitors to the Grand Prix were from overseas, combining their visit to the event with a holiday in the UK. According to one raceway operator, some of their races are watched by a fan base of which nearly 60% are Europeans.

Whilst the majority of visitors will be travelling to and from an event/activity on the same day, many others will be staying overnight. According to the economic impact study of the 2002 Grand prix, of the 116,000 visitors attending, 44% were staying in accommodation within 50 miles of Silverstone Circuit.

3.5 Women and Motor Sport

Women and the family market are in general under-represented. The machismo image has been a major barrier to women's involvement. However there are signs of change. More women are entering motor sports as drivers, and recent initiatives such as the Formula Women championship and the British Women Racing Driver's Club (BWRDC) are beginning to raise the profile of female drivers.

As female competitors grow in number and profile, it is anticipated that interest in the sport by female consumers will grow.

3.6 Changing consumer trends – new challenges and opportunities

Like any other industry, motor sports needs continual investment if it is to thrive. This means investment in its consumers and staying in tune with changing leisure trends and consumer behaviour. With regard to its future, current consumer trends send mixed messages. This is discussed next.

3.6.1 A Thriving Sport?

The Mintel research suggest that Motorsport has a sizeable following among the UK consumer, with just over 40% of the public reporting to regularly watch the sport either as a spectator or on TV. However, a survey undertaken annually by MORI which tracks interest in sport has found evidence of a general decline in the nation's interest in sport (see Figure 1).

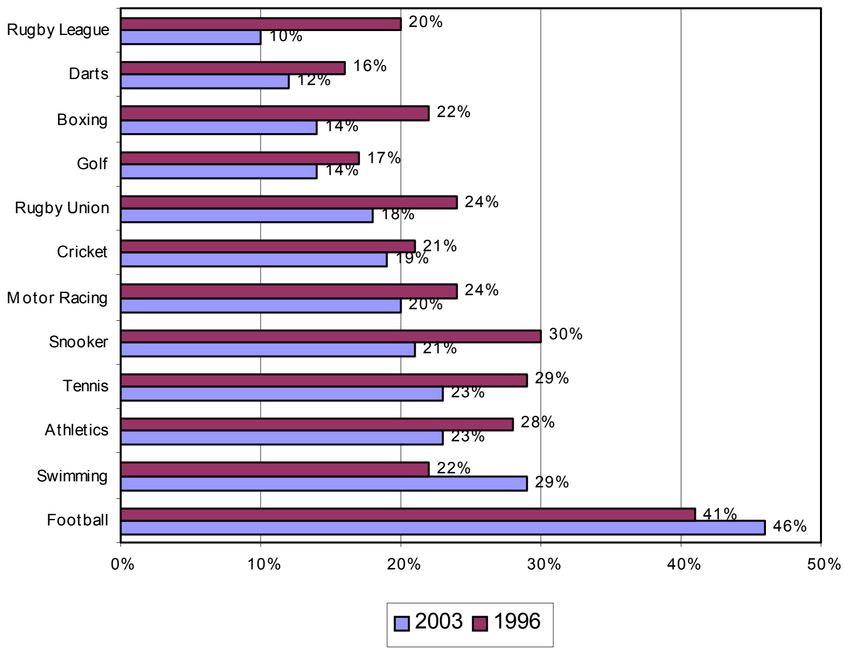
According to the MORI survey over the last 7 years interest in motor sport has declined by 4%. Declining levels of interest are reflected in attendance figures. Whilst some of the international and premier events tend to be sold out, the general picture is that the spectator market grew steadily until 1998/99 when attendance began to level off.

There are likely to be many reasons for this but competition from other leisure activities is a critical factor. Never before has there been so much choice about what do with one's leisure time, equalled also with higher disposable incomes to spend. Yet paradoxically as choices have increased, people's leisure time has declined. The trend in consumer behaviour indicated that the more people's leisure time is squeezed the more they value it and the more they want out of it.

This could work in the favour of motor sports. The entertainment value of watching a race or taking part in a driving day experience whilst enjoying a weekend away with friends or with family meets the challenges posed by the 'cash-rich, time-poor' society of today, where consumers are often looking for shorter breaks where they can 'pack-in' as much as possible. Greater awareness of the events and activities available as well as carefully designed promotional strategies will be the way to attract greater interest.

Circuits may also find that they need to invest more heavily in the provision for activities such as experience days (see 3.4.3) in order to reach a broader audience than traditional motor sport enthusiasts.

Figure 1: Interest in Sports



3.6.2 *Increasing expectations*

Another area operators need to focus on if they are to boost interest in the sport is TQM - Total Quality Management. Customer satisfaction and quality are 'buzz words' of our age, yet they appear to have bypassed many motor sport operators. A degree of complacency comes from the comfort of feeling that visitors and participants will always come to events as they 'love' the sport and therefore are less interested in matters such as the quality of toilets, catering, seating, car park availability and queuing times. Motor sports would not be the first industry where a yawning chasm has developed between the perspective of management and the 'punter'.

Studies of consumer behaviour all point to higher levels of expectation among the consumer. Consumers have become more sophisticated, more discerning and choosier. Visitors to motor sport events are no exception in this regard. Satisfying customers means having quality management systems in place where quality is perceived from a customer's point of view rather than from management.

As part of the study, mystery shopping exercises were undertaken at two selected circuits in the region. Overall ratings for facilities and friendliness of staff were good, though catering, merchandise and children's play activities i.e. fun fair rides put on for families, were viewed to be over-priced. The lack of shelter for spectators during poor weather was also observed (See Appendix 2 for findings from the visits).

3.6.3 Motor sport as a 'lifestyle'

Over the past few years there has been phenomenal growth in 'extreme sports', particularly among the younger population. The term extreme sports encompass an ever growing range of adrenaline raising sports from white-water rafting to sky diving. It includes most high speed motor racing sports.

Changing lifestyles are pointing towards a particularly positive future for the extreme sports sector. This growth area is well recognised by some motor sport venues and this is indicated in their expansion of facilities to offer ancillary activities such as karting, quad-bikes, off-road racing, and Red Letter Days gift vouchers to widen appeal and meet consumer demands.

According to the Mintel report the popularity of track days and experience days comes from the consumers drive to find different, more exciting gifts. Track days are also booming because people are increasingly accepting that they cannot drive their cars as fast as they would like on the public roads due to the combination of constant traffic congestion and the proliferation of speed cameras.

The significance of track days and promotion of smaller branches of the sport such as karting and off-road 4x4 driving experiences, is illustrated by the impact it has on business revenue. One circuit manager reported that around 30% of annual revenue came from track days alone.

Another indicator of the interest in motor sport-related leisure activities is the growth of motor sport magazines. Over 25% of 15-24 year old males in the UK read publications such as 'MaxPower', a magazine devoted to fast or modified road cars. Circulation of such magazines averages over 450,000 per month[6].

4.6.4 Demographic trends

Demographic factors are generally favourable to the future growth of the market. Over the past few years, there has been a growth in the number of 15-24 old males. This group are most likely to be interested in watching motor sport either as a spectator or on TV. A positive trend for historic and vintage events such as the Goodwood Revival and vintage and classic car rallies is the growing proportion of the population accounted for by the 55-64 year olds, the so-called 'grey market' who tend to be more affluent than the average and have more leisure time to spend visiting events.

[6] Cited from *Report of the Motorsport Competitveness Panel*, page 25.

The preceding discussion has highlighted that the data is very partial but it does indicate that motor sport tourism is very significant in the overall tourism market.

Regular watchers of all types of motor sports are found among three quite different groups. At one end of the spectrum we have the young male enthusiast, reflecting perhaps the aspirations of younger consumers. Somewhere in the middle, are well-off families, who are most likely to be interested in Formula One races. At the other end of the spectrum there is a significant following for a number of different branches of motor sport from those in the pre- and no family households and those aged 45-64 with no children aged under 16 years. Whilst the former group may tend to live with well-off parents, or are new home owners, the latter group tend to have the highest amount of disposable income and the least family commitments, thus enabling them the freedom to follow their sport most avidly.

Moreover a distinction needs to be drawn from the enthusiast element in the spectator market who will follow a wide range of events and the casual spectator who is likely to attend only the high profile championships.

There is also a distinction of the enthusiast and the more one-off non-enthusiast for participatory events like track and experience days. The latter may not necessarily be followers of the sport but may view the activity as a fun day out with friends. There tends to be little repeat custom from this group.

Greater market targeting and special promotional offers are likely to attract ‘like-minded’ consumers and help boost attendance figures. Whilst improvements to venues may have a marked impact on repeat business.

For the new time conscious generation, special racing and accommodation/hospitality packages which remove the fuss over arranging a trip are very attractive offers.

Initiatives to boost attendance and increase repeat custom require co-operation and collaboration between the motor sport venues, accommodation establishments, tour operators, destination management organisations plus many others. The pooling of resources and information is the first step to developing new promotional tactics to increase attendance and provide business opportunities for local accommodation establishments, pubs, restaurants, shops and so forth.

The next section examines how the tourism benefits of motor sports can be maximised.

4. MOTOR SPORT CLUSTERING

4.1 Introduction

The previous section has outlined the argument that motor sport tourism is a significant sector, which provides the region with economic and social benefits in terms of generating income and employment. However, we know relatively little as to whether commercial opportunities are being maximised. An apparent lack of integration and cohesiveness between motor sport venues and tourism businesses has been identified as one of the major impediments to the growth of motor sport tourism. How can the tourism potential be maximised?

For any business the forming of linkages and alliances with complementary businesses is a vital ingredient for increasing opportunities and revenue. Being part of a cluster can enable businesses to increase collective markets and capacities by working together.

4.2 Benefits of clustering

Industry clustering has long been recognised as a vehicle for regional economic development.

Clustering has been defined as:

"Clusters are geographic concentrations of interconnected companies and institutions in a particular field, linked by commonalties and complementarities" (Source: Porter, 1990).

There are some disputes among theorists and economists as to the exact meaning and the term 'cluster' is often used interchangeably with 'network'. A common concern is the role of geographical proximity. In most of the literature, clustering is used only when businesses are located close together. However, clustering has been used to describe linkages between local, regional and national government bodies, implying that other connections, apart from geographic connections are also important. What unites all commentators is the belief that business growth is a result of the co-operation between interconnected companies in a particular field which is undertaken to strengthen each company’s own competitive capability.

Some of the benefits of clustering are outlined in the Table 11 overleaf.

Table 11: Summary of potential benefits

Potential Benefits	Reasons
Reduce risk and deal with uncertainty	By creating a mass of technical competencies, market intelligence, as well as human and financial resources, companies can be more prepared to address unexpected events.
Block or co-opt competition	The access of competitors to strategic resources is curtailed thanks to greater operative strength or thanks to their joining the partnership.
Create economies of scale	The greater dimension covered (purchases, bookings, sales, etc.) lead to a lesser incidence of unit costs. For example, joint purchases of raw materials or joint marketing can attract bulk discounts.
Opportunities to develop purpose economies	The collaboration sprit allows greater distribution of specialisation. There is more space for operating in market niches thanks to less internal competition
Greater market control	Companies joined in partnership can move in larger markets.
Growth of technological and organisational 'know-how'	The circulation of knowledge enhances the diffusion of technologies and the development of new operative techniques.
Reinforcement of image	Brands are reinforced at company and destination level, both towards the customers and suppliers.
Company growth both in terms of product quality and process efficiency	Operating in collaboration generates a healthy competition among companies that tend to raise both product quality and management skills.
Creation of synergies	The cluster enables an infrastructure of professional, legal, financial and other specialist services to develop
Positive effect of local economy	Clusters reach a critical mass, attracting other businesses to the area, thus improving competitive and creating growth. The strong inter-dependence between businesses enhances the diffusion of the acquired benefits to the local and regional economy.

Source: A Machiavelli (2001) 'Tourist Destinations as integrated systems', Tourism Review 56:3/4

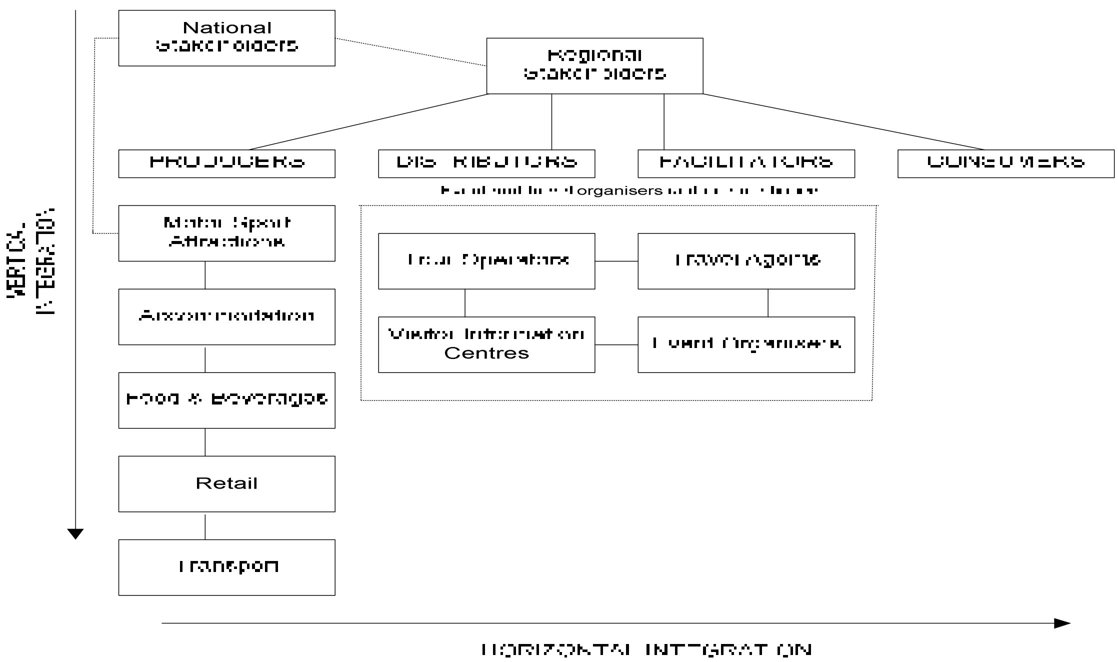
The diagram below illustrates what a potential Motor Sport Tourism Cluster could look like. In this model there are a host of players working at different levels implying a degree of both vertical and horizontal linkages. The focus is on the linkages between motor sport venues, suppliers, complementary businesses, customers, as well as national associations and government/quasi-government agencies.

At national level, we have the Motor Sport Association (MSA), the Motorsport Industry Association (MIA) and the Government Motorsport Unit (GMU) They are the key players for promoting national standards, lobbying and improving the competitiveness of the industry.

At regional level, key players are the regional tourist boards, development agencies, and cultural consortia's who can serve as key facilitators for the exchange of information and best practice, access to research and the provision of business advice .

At local level, the motor sport circuits, raceways and activity centres will need to be working in synergy with tourism businesses on aspects such as marketing, provision of visitor information, accommodation booking, etc.

Figure 2: A Motor Sport Tourism Cluster Model[7]



[7] Adapted from Poon 1993 and Coopers et al. 1998 in *Structures, performance and competitiveness of European tourism and its enterprises*, 2003.

4.3 Conditional factors

For a cluster to work effectively there are at least four requisite factors to consider

- A strong regional trademark
- Recognition for the need for collaboration and reciprocity
- A proximate environment
- Accessibility and a good infrastructure

These are considered below.

4.3.1 Regional trademark

The region is already well recognised for its concentration of motor sport venues, companies and heritage, and is part of the industry cluster known as the 'Motor sport Valley'. The cluster stretches from Southampton to Derbyshire and out to East Anglia, and is made up of race car manufacturing and engineering companies, racing teams, racing circuits and R&D institutions. Significant concentrations of businesses are found in the South East (see Appendix 3). The cluster is knit together through systems of production and the transfer of technology and innovation.

‘Motorsport Valley’ offers an already available brand to capitalise the tourism strengths of motor sport. However, there is little evidence that this brand name is being utilised for this purpose. A review of regional tourist board and local authority promotional material reveal the relatively minor role motor sport and sport in general has played in exploiting the region's tourism offer. The focus has tended to be on landscapes, history and culture, the coast and the countryside.

None of the motor sport operators interviewed for this study mentioned the Motor Sport Valley map produced by MIA which displays circuits, raceways, museums and other motor sport related attractions in the connecting regions of the South East, South West and the East Midlands.

The study found that in general, venues are marketed and promoted on a 'stand alone' basis. Motor sport event promoters and circuit owners tend to concentrate their efforts on the specialist press and existing databases (i.e. of members and past ticket purchasers). This continues to be the main thrust of their efforts today, but there are indications that they are increasingly prepared to spend their budget on a wider and more diverse range of media in order to attract customers. This reflects a growing recognition among operators that they are competing in a much wider market that just motor sports.

However, the study did not find any evidence of joint marketing or branding. There was a general perception among operators that they were in direct competition with each other for spectators.

4.3.2 Collaboration and reciprocity

The motor sport sector arguably has little incentive to pursue the tourism benefits which can flow from motor sport activities, especially the motor sport events, because they themselves cannot directly capture many of those benefits. The great majority of those benefits accrue to other parties - accommodation providers, transports operators, retail outlets, restaurants and so on.

However, tourism unlike many other industries is characterised by a high level of interdependence between different sectors; this is simply necessary in order to meet the demands of the visitor. Visitor attractions may provide the catalyst for pulling visitors to an area, but if it is located somewhere totally inaccessible by public transport, or that there is no where within reach for visitors to stay, the attraction is unlikely to remain competitive for long. The interdependence of attractions, services, transportation, information and promotion highlight the need for collaboration.

Interdependence is also driven by the quality of the visitor's experience. The visitor experience will be based on the overall impression of the place visited. The quality of the visitors experience depends not only in the primary attraction but also on the quality and efficiency of complementary businesses such as hotels, restaurants, retail outlets. Future visits could be marred by poor information and poor service. For example, a guest may not return to the same hotel, even if the stay was excellent, if the restaurant down the road offered a poor service. Businesses are mutually dependent - good performance by one can boost the success of others.

The study found a certain degree of mutual awareness of this dependency. The majority of operators produced a selective listing of accommodation in the area and a number of local hotels offered discounts for participants and spectators, though some were found to increase their prices during event weekends.

Apart from accommodation information, few operators supplied information on places to eat and other places to visit locally whilst on a visit. One activity centre had a special relationship with a local visitor attraction whereby free tokens to the centre was offered in the ticket, as a way of promoting the attraction. Another motor sport speedway which had limited catering services had forged a good working relationship with a number of local pub landlords to supply food and drink to participants.

In general, the study found few examples of joint working between motor sport and tourism businesses. Many motor sport businesses did not see that they had a role in provision of information to visitors regarding accommodation for example, whilst others felt that they did not have the resources to do so.

4.3.3 Proximate environment

In a global age location may not seem particularly relevant for business growth. Open global markets, rapid transportation, and high speed communications should allow any business to source any thing from any place at any time. However, in theory a companies ability to compete is affected by the place it is located - the local milieu can mean the difference between success and failure. For example, the availability of high quality, suitably qualified staff, infrastructure and proximity to rail and bus stations and airports will have a critical bearing on performance.

Not only does location matter but also proximity of businesses as this provides competitive advantages. The ability of operators to draw large non-local attendance will be partly dependant on the availability of local hotels, guest houses, caravan sites and so on, to accommodate visitors. In turn, businesses located close to a venue will enjoy a significant boost in revenue, often during an otherwise quiet period.

A successful tourist destination is one that offers the visitor the opportunity of exploiting a variety of attractions and services that are within reach. Visitors are also more likely to seek a wider range of services and thereby spend more money on them when they are located together.

Our audit of tourism businesses presented in Section 5 found that in general, motor sport venues are well served by businesses such as accommodation providers ranging from the budget to the luxury market, restaurants, pubs, cafés and retail outlets.

4.3.4 Infrastructure

To maximise the tourism potential, the importance of appropriate infrastructure - adequate accommodation and transport - air, road and rail, restaurants, retail outlets and entertainment venues cannot be overstated. Capturing tourism benefits can prove difficult in areas where these may be in short supply. A starting point in addressing these issues would be to conduct audits to find out what is available.

Section 5 presents results of the audit undertaken as part of this research exercise.

5. TOURISM AUDIT

5.1 Introduction

Information for the audit was drawn from three main sources: Yellow Pages, Thompson's Directory and the Regional Tourist Board's database of tourism businesses in the region.

The businesses identified were plotted on a map to identify areas of concentration and links to major roads. As the proximity to towns and villages for each venue differs, it was felt all towns and villages within a 20 mile radius of the venue would be included.

Full tourism audits were compiled for seven motor sport venues in the region. These are Brands Hatch, Goodwood and Thruxton, the two smaller race circuits at Lydden Hill and Ringwood Raceway, Leisure Pursuits Off Road Activity Centre and the National Motor Museum at Beaulieu. The latter was also included in this audit for two reasons: one is that it has a unique collection of the world motor cars and is a key attraction for motor enthusiasts, families and schools. Beaulieu also has a significant economic impact on the local area. Attracting around 335,000 visitors annually, a recent study[8] estimated that the attraction generates around £10 million annually for local businesses through visitor off-site expenditure and the Museum's own expenditure i.e. local salaries and purchase of supplies.

In general all 7 sites have the distinct advantage of being close to the sea and the range of coastal sites and towns that this brings. There is certainly a close link with the race track and the beach/ resorts at Lydden Hill, Ringwood raceway and Goodwood. Beaulieu, Ringwood and Thruxton also benefit from the New Forest National Park, which is a magnet in its own right for visitors.

The seven venues are identified on Figure 3. They are spread throughout the South East region and provide examples of the different motor sport tourism products on offer in the South East.

[8] Economic Impact Appraisal study of the Museum by Tourism South East.

Figure 3. Overview Map of Tourism Audit Locations

5.2 Findings

5.2.1 Beaulieu National Motor Museum

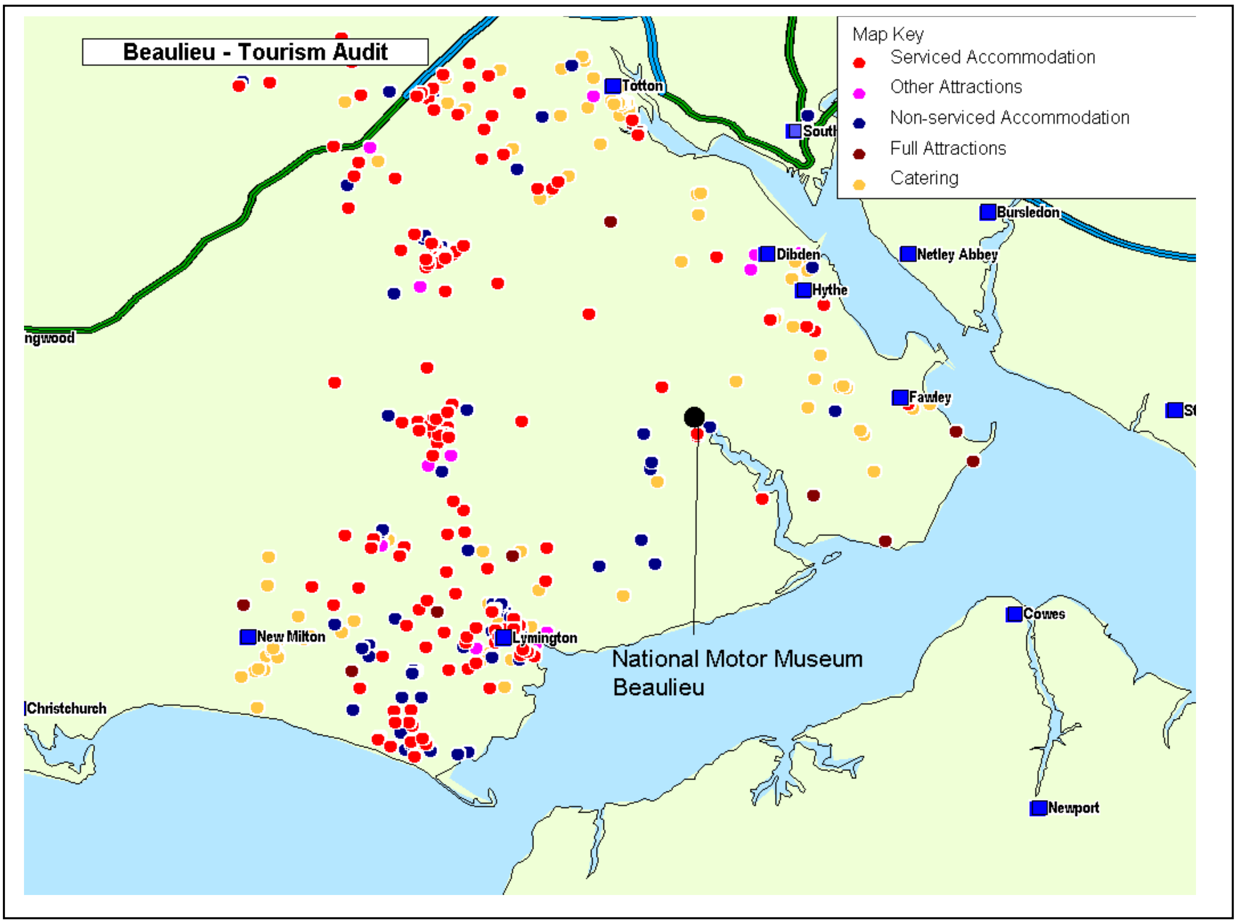
The Beaulieu National Motor Museum is situated in the heart of the New Forest between Southampton and Bournemouth. Managed by the National Motor Museum Trust, Beaulieu is also the home of the world famous Beaulieu International Autojumble and Automart.
The museum appeals to individuals/ families, motor enthusiasts, or members of interest groups or educational parties. The collection has 250 vehicles comprising cars, motorbikes, commercial vehicles, motoring eccentricities and memorabilia.

The tourism audit was carried out within an approximate 10 mile radius around the museum. Towns included in the audit include Lymington, New Milton, Brockenhurst, Lyndhurst, Totton, Hythe and Fawley. Although Southampton has been excluded from the audit, the major routes through the area including the A35, A326 and A337, tend to orientate into and around the city.

Table 12: Beaulieu National Motor Museum

Sectors	Number in Area
Hotels / Motels	36
Guest Houses / Serviced Farmhouses	22
B&B / Inns	120
Camping / Caravanning	13
Other non-serviced accommodation	87
Total Accommodation in Audit	278
Pubs	77
Restaurants	104
Cafes	23
Fast food / Take away	32
Total Catering in Audit	236
Museums / Art Galleries / Crafts	13
Country Parks / Outdoor attractions (walks etc)	5
Wildlife attractions / Zoos / Farms	4
Gardens	6
Historic Properties / Heritage Centres / Churches	8
Leisure / Theme parks	1
Other (e.g. Historic Town Centres, Rides)	14
Total Visitor Attractions in Audit	51

Figure 4. Beaulieu National Motor Museum - Tourism Audit



The location of Beaulieu to the east of the New Forest, benefits from its relative proximity to Brockenhurst railway station, with its regular hourly service from London Waterloo. Bicycles can be hired from Brockenhurst station and there is 100 miles of trails in the forest.

Bealieu motor museum is part of an estate with an abbey that is also open to the public.
In general, the museum contributes a lot of business to all types of establishment in the area.

There is a reasonable distribution of accommodation types in the area and it is highly likely that people visiting the museum will be doing this as part of a longer stay in the area. There is a greater emphasis on the more informal types of accommodation, as the number of Bed & Breakfast's and Guest Houses outweighs hotels. Camping is also a popular option with over-night visitors. The greatest proportion of accommodation, catering and attractions are in the Lymington area

5.2.2 Brands Hatch

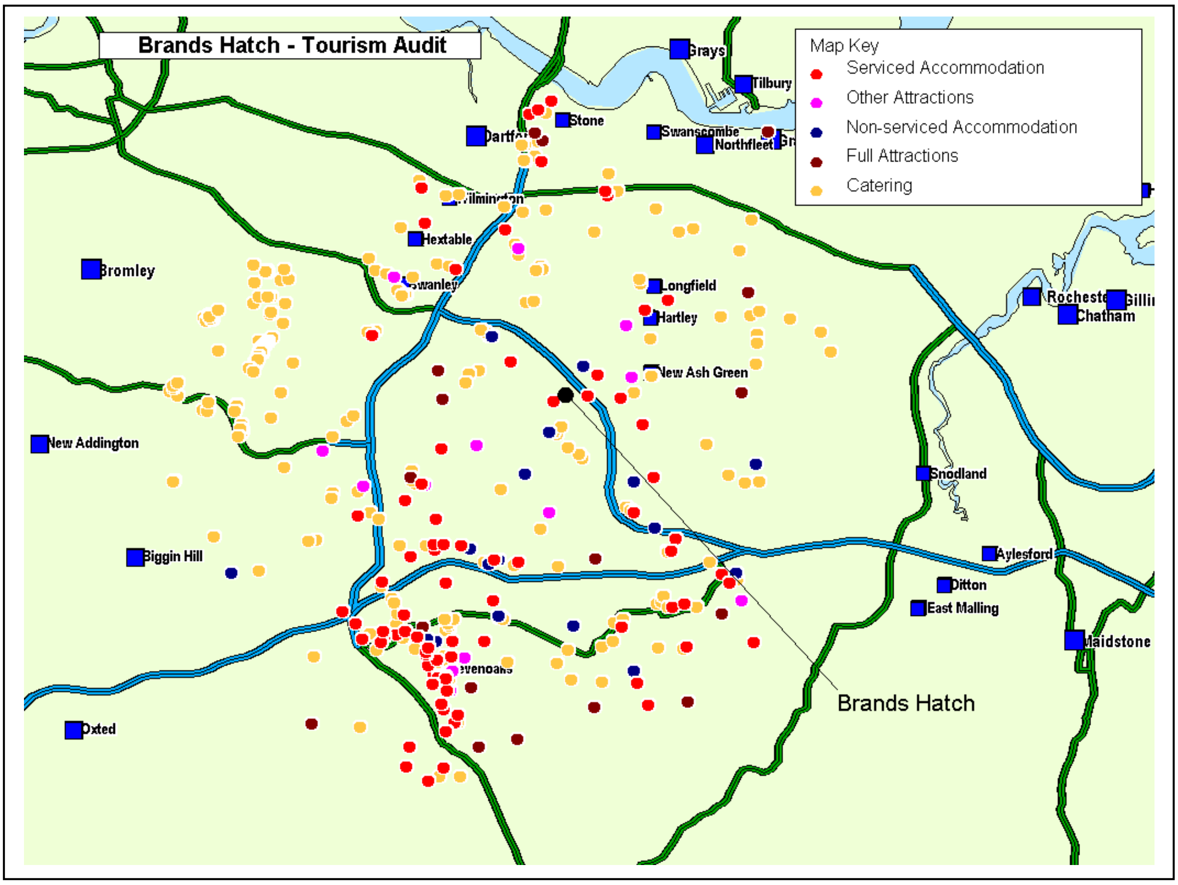
The Brands Hatch circuit is located in North Kent between the M20, M26 and M25. The venue plays host to a number of national and international car and motorbike championships throughout the year, including the British Touring Car Championship, the British Superbike Championship and the FIM World Superbike Championship. Brands Hatch also hosts a number of club and smaller race meetings as well as motor sport testing days.

The tourism audit was carried out within an approximate seven mile radius around the race circuit. Towns included in the Audit include Sevenoaks, Swanley and Orpington. Major routes through the tourism audit area include the M20, M26, M25, A20, A225 and the A25.

Table 13: Brands Hatch

Sectors	Number in Area
Hotels / Motels	14
Guest Houses / Serviced Farmhouses	3
B&B - Inns	62
Camping / Caravanning	5
Other non-serviced accommodation	15
Total Accommodation in Audit	99
Pubs	133
Restaurants	157
Cafes	16
Fast food / Take away	40
Total Catering in Audit	346
Museums / Art Galleries / Crafts	4
Country Parks / Outdoor attractions (walks etc)	0
Wildlife attractions / Zoos / Farms	5
Gardens	5
Historic Properties / Heritage Centres / Churches	7
Leisure / Theme parks	0
Other (e.g. Town Centres, Rides, Railways)	4
Total Visitor Attractions in Audit	25

Figure 5. Brands Hatch – Tourism Audit



Brands Hatch is only 20 miles south east of London and within easy reach of Junction 3 of the M25, is clearly a reason for its popularity.

There are regular train services to Swanley from London Victoria, Medway town, Sevenoaks and the Kent coast. Swanley is 5 miles from Brands Hatch and a 10 minute taxi ride.

However, the tourism infrastructure in the immediate area is limited, as the scarcity of overnight accommodation (13 hotels) bears witness to. Sevenoaks is the nearest area where there is a good supply of hotels and catering establishments. Otherwise much of the dining on race days is actually done in corporate and public entertainment zones within the circuit.

5.2.3 Goodwood

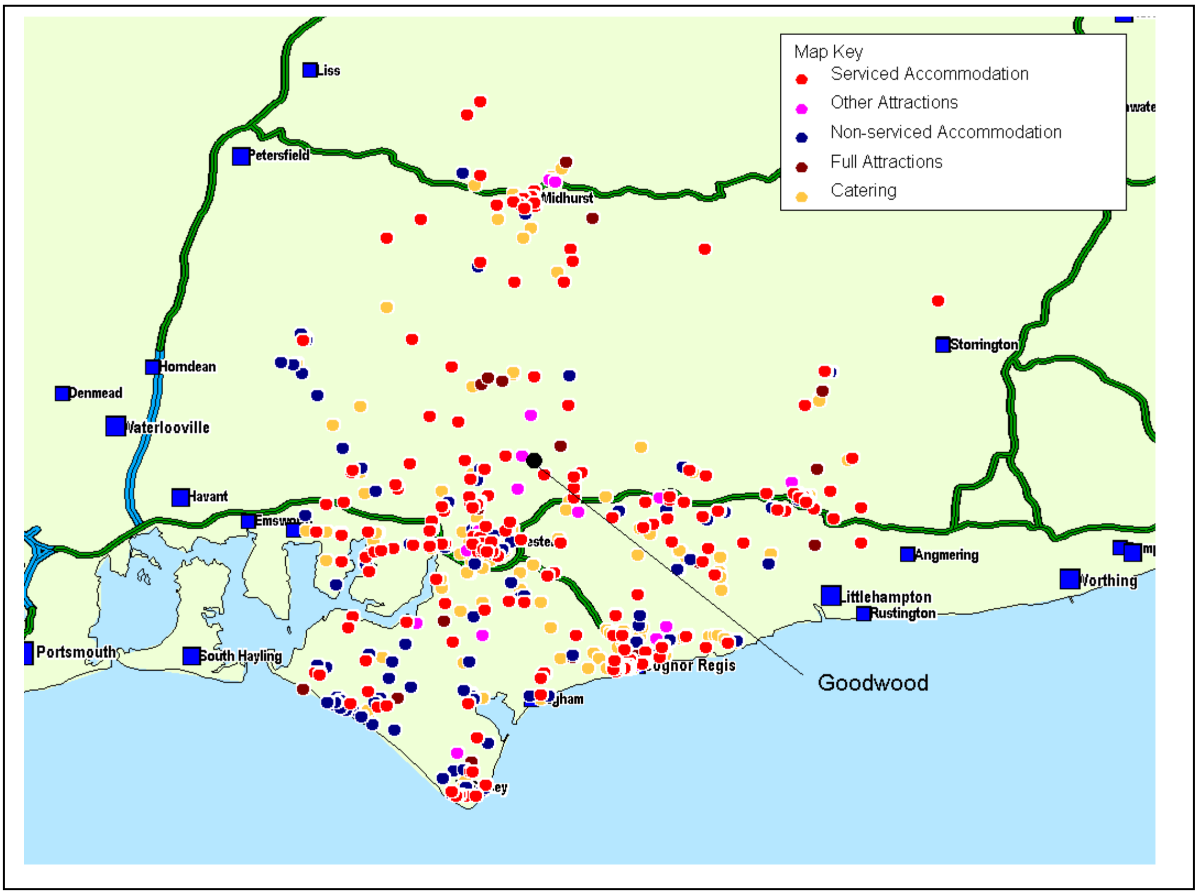
The Goodwood circuit located near Chichester in West Sussex plays host to two international motor sport events, The Festival of Speed and The Goodwood Revival meeting.

The tourism audit was carried out within an approximate nine to ten mile radius around the venue. Towns included in the audit include Chichester, Bognor Regis, Arundel, Midhurst and Bosham. Major routes through the audit area include the A27, A286 and A285

Table 14: Goodwood

Sectors	Number in Area
Hotels / Motels	30
Guest Houses / Serviced Farmhouses	17
B&B - Inns	169
Camping / Caravanning	26
Other non-serviced accommodation	109
Total Accommodation in Audit	351
Pubs	125
Restaurants	158
Cafes	37
Fast food / Take away	41
Total Catering in Audit	361
Museums / Art Galleries / Crafts	19
Country Parks / Outdoor attractions (walks etc)	3
Wildlife attractions / Zoos / Farms	3
Gardens	2
Historic Properties / Heritage Centres / Churches	11
Leisure / Theme parks	2
Other (e.g. Town Centres, Rides)	12
Total Visitor Attractions in Audit	52

Figure 6. Goodwood Tourism Audit



The Goodwood circuit benefits from having a host of serviced accommodation types to the north, south and west of the site. There is a strong Bed & Breakfast stock in the vicinity, which is complimented by a large number of pubs and restaurants.

The race season starts in the first weekend of February and racing is held on Saturday evening through to the end of November. Racing also takes place on Wednesday evenings in July and August. The two major events, the Festival of Speed and the Goodwood Revival, attracts some 158,000 and 100,000 visitors respectively.

5.2.4 Thruxton

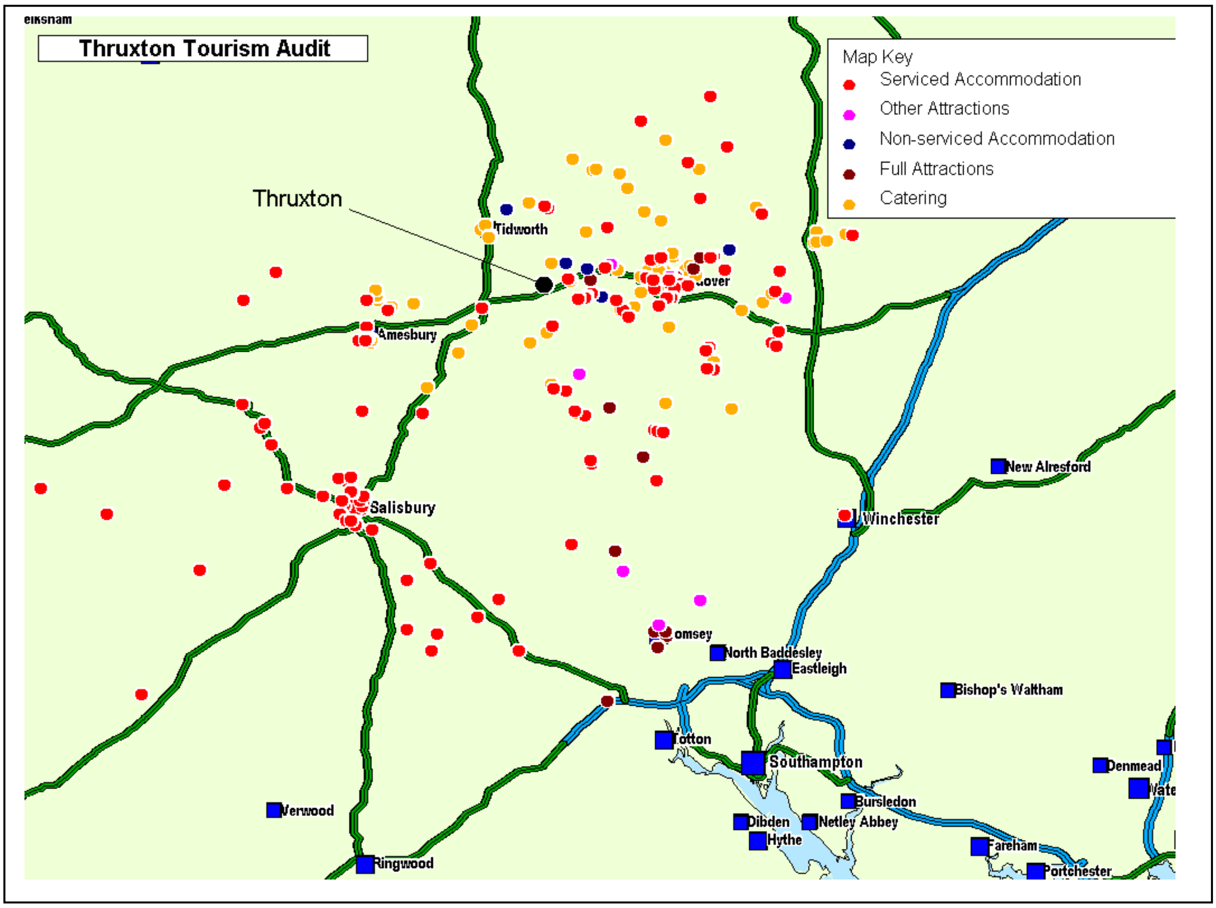
The Thruxton Circuit is located 5 miles west of Andover in Hampshire. The venue hosts race meetings for car and motorcycles including the British Touring Car Championship, the British Superbike Championship and the British F3 Championship. A number of motor sport activities are also based at Thruxton including public karting and an off road 4x4 driving facility. The events are mainly one day long, with the exception of the bank holiday weekend in August

The tourism audit stretched approximately 11 miles to the East of the circuit to include Andover and Whitchurch and approximately 14 miles to the South and West of the circuit to include Salisbury. Salisbury has been included in the Audit for accommodation only. Major routes through the Audit area include A303 and A343, with the former offering a major link to the M3 on the east and through to Dorset and Devon on the western side.

Table 15: Thruxton

Sectors	Number in Area
Hotels / Motels	38
Guest Houses / Serviced Farmhouses	20
B&B - Inns	76
Camping / Caravanning	1
Other non-serviced accommodation	7
Total Accommodation in Audit	192
Pubs	74
Restaurants	47
Cafes	4
Fast food / Take away	25
Total Catering in Audit	150
Museums / Art Galleries / Crafts	3
Country Parks / Outdoor attractions (walks etc)	4
Wildlife attractions / Zoos / Farms	4
Gardens	3
Historic Properties / Heritage Centres / Churches	9
Leisure / Theme parks	36
Other (e.g. Town Centres, Rides)	7
Total Visitor Attractions in Audit	33

Figure7. Thruxton Tourism Audit



Andover is the transport hub for trains from Waterloo to the area, which are twice hourly and take 70 minutes. There are many petrol stations and one designated bus service that links Andover with Thruxton.

The greatest proportion of accommodation is in the Andover conurbation and its outlying villages. There is a far greater proportion of Bed & Breakfast's compared to the other areas. In contrast there is a shortage of accommodation in the form of in camp/ caravan sites. The only camp site in the area is actually provided on the site on special race days

5.2.5 Leisure Pursuits Off Road Circuit

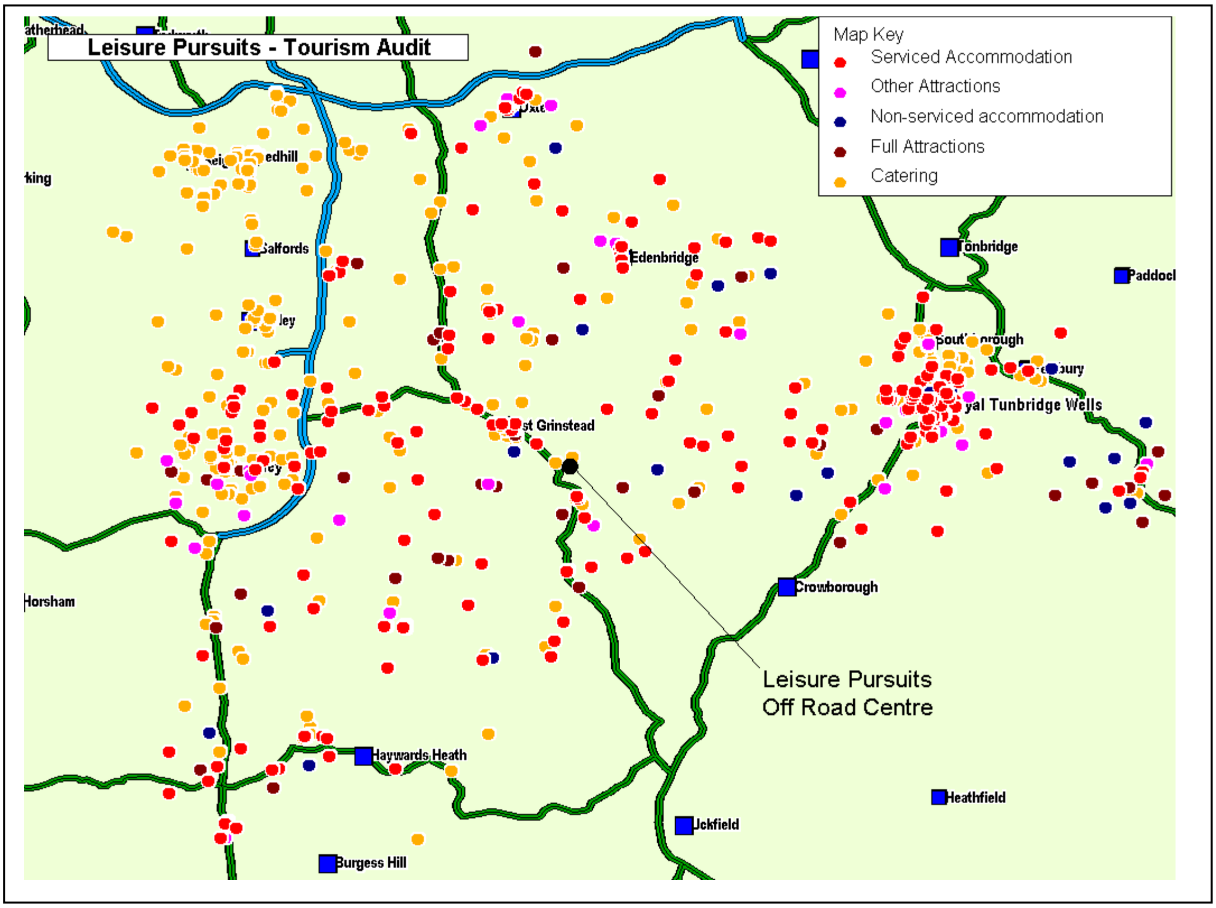
The Leisure Pursuits Off Road Circuit is located in West Sussex. The venue provides multi-activity off road events for individuals and groups. Activities include tank driving, monster trucks, 4 wheel off road driving, quad bikes and rally driving.

The Tourism Audit was carried out approximately 14 miles to the East of the activity centre to include Royal Tunbridge Wells, 10 miles to the West of the of the venue to include Crawley and 12 miles to the North West to include Reigate and Redhill. Other towns include Godstone, Limpsfield, Lingfield and Horley. Major routes through the audit include the A264, A22 and M23.

Table 16: Leisure Pursuits Off Road Circuit

Sectors	Number in Area
Hotels / Motels	57
Guest Houses / Serviced Farmhouses	15
B&B - Inns	127
Camping / Caravanning	3
Other non-serviced accommodation	29
Total Accommodation in Audit	231
Pubs	250
Restaurants	279
Cafes	42
Fast food / Take away	116
Total Catering in Audit	687
Museums / Art Galleries / Crafts	20
Country Parks / Outdoor attractions (walks etc)	13
Wildlife attractions / Zoos / Farms	7
Gardens	8
Historic Properties / Heritage Centres / Churches	14
Leisure / Theme parks	0
Other (e.g. Town Centres, Rides)	10
Total Visitor Attractions in Audit	72

Figure 8. Leisure Pursuits Tourism Audit



There are a great number of hotels in this area of West Sussex, with businesses exploiting the proximity to Gatwick airport and the year round business this generates. The airport and other business factors are currently the major drive for accommodation and catering in the area.

Crawley and Royal Tunbridge Wells provides the hub for the majority of accommodation and catering services.

5.2.6 Lydden Hill

Lydden Hill is located in South East Kent. The circuit hosts a number of smaller car and motorcycle race meetings as well as rallies, sprints and training days. The South East Motor Sports Enthusiasts Club has been promoting motor sport events at Lydden International Race Circuit since 1994.

The Tourism Audit was carried out within an approximate 17 mile radius of the circuit. Towns included in the audit include Canterbury, Ashford, Sandwich, Deal, Dover and Folkstone. There is already a strong tourism factor attracting vast numbers of people to historic Canterbury, as well as the diverse and interesting coastal towns. Major Routes through the audit area include the A256 and M20. The A2 passes very close to Lydden Hill.

Table 17: Lydden Hill

Sectors	Number in Area
Hotels / Motels	90
Guest Houses / Serviced Farmhouses	70
B&B - Inns	217
Camping / Caravanning	33
Other non-serviced accommodation	149
Total Accommodation in Audit	559
Pubs	140
Restaurants	121
Cafes	33
Fast food / Take away	49
Total Catering in Audit	343
Museums / Art Galleries / Crafts	42
Country Parks / Outdoor attractions (walks etc)	14
Wildlife attractions / Zoos / Farms	10
Gardens	13
Historic Properties / Heritage Centres / Churches	21
Leisure / Theme parks	3
Other (e.g. Town Centres, Rides)	52
Total Visitor Attractions in Audit	155

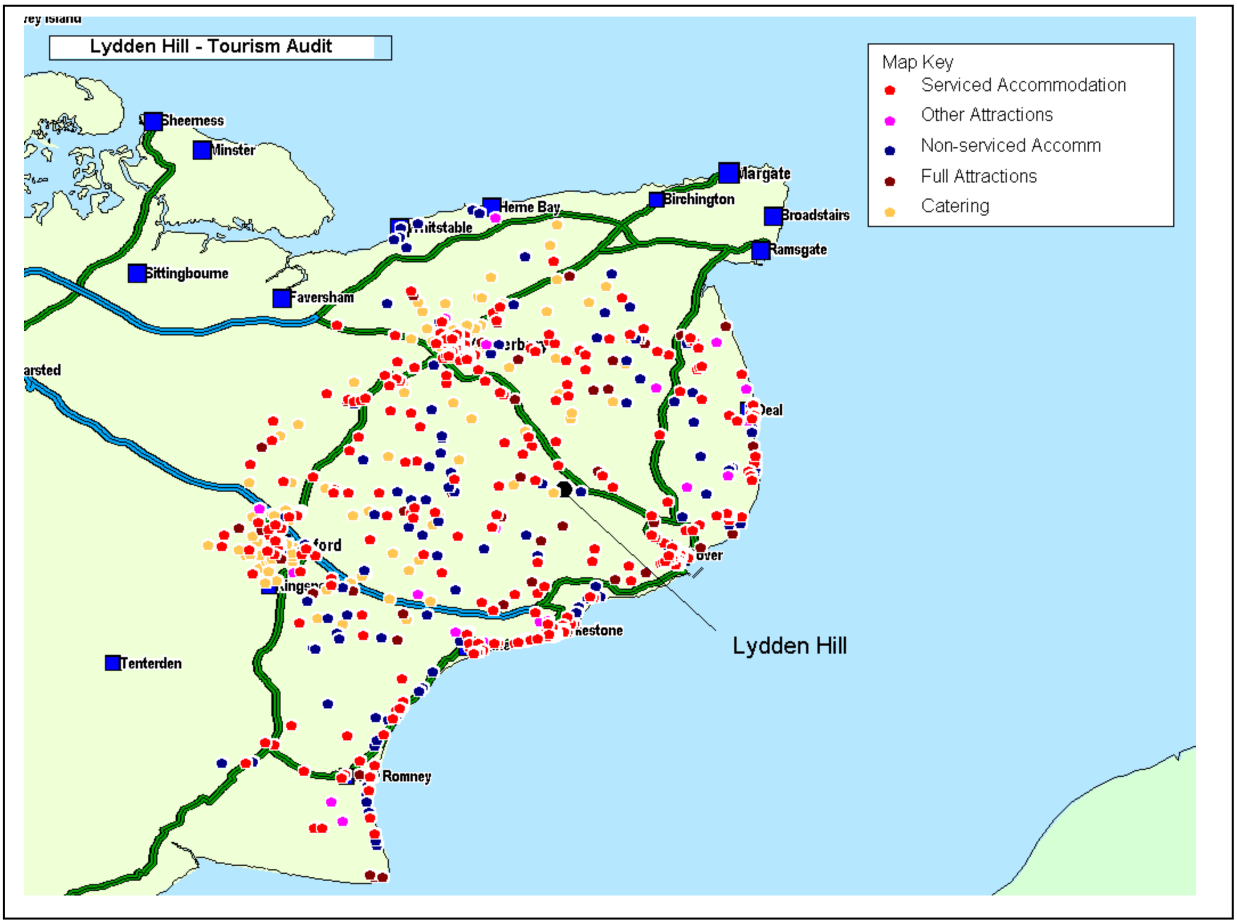


Figure 9. Lydden Hill Tourism Audit

There is a high number of serviced and non-serviced accommodation in this area of south-east Kent. The location near the coast plays a part in attracting visitors to the area. Additional factors to consider are the many visitors from France into Dover and people taking one-night stay on the way from London or Paris/ Brussels.

At the same time there has been some regeneration of towns on the Kent coast and this has seen greater investment in tourism facilities, the emergence of ‘café culture’ and a contemporary arts scene.

5.2.7 Ringwood Raceway

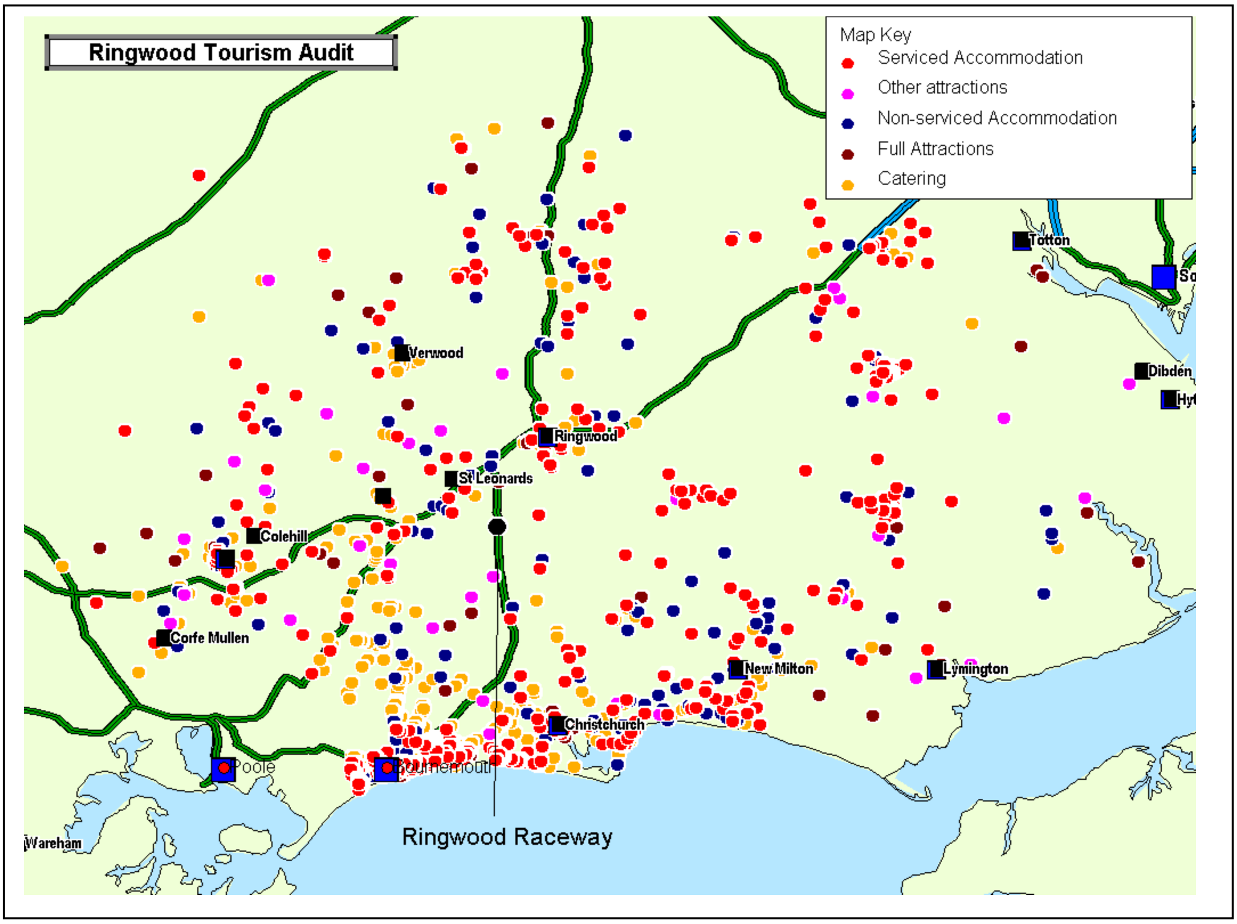
Ringwood Raceway is located on the edge of the New Forest on the border between Hampshire and Dorset. The raceway hosts oval racing events and is the largest off road racing venue in Europe.

The Tourism Audit was carried out within an approximate 10 mile radius of the venue. Towns included in the Audit include Bournemouth, Christchurch, New Milton, Brockenhurst, Fordingbridge, Ferndown and Wimborne. Major routes through the Audit area include the A338, A31 and A35.

Table 18: Ringwood Raceway

Sectors	Number in Area
Hotels / Motels	182
Guest Houses / Serviced Farmhouses	213
B&B - Inns	234
Camping / Caravanning	40
Other non-serviced accommodation	182
Accommodation in Audit	851
Pubs	190
Restaurants	330
Cafes	78
Fast food / Take away	176
Total Catering in Audit	774
Museums / Art Galleries / Crafts	34
Country Parks / Outdoor attractions (walks etc)	23
Wildlife attractions / Zoos / Farms	9
Gardens	14
Historic Properties / Heritage Centres / Churches	30
Leisure / Theme parks	3
Other (e.g. Town Centres, Rides)	41
Total Visitor Attractions in Audit	154

Figure 10. Ringwood Raceway Tourism Audit



For rail travellers, Matchams Leisure Park is situated only 7 miles from Bournemouth and 4 miles from Christchurch stations, both covered by South West Trains Network. Whilst Heathrow airport is approximately a 2 hour drive, Bournemouth International airport is only 4 miles away at Hurn.

Being located in the newly designated National Park, Ringwood is very well serviced by accommodation and catering facilities. It is also surrounded by an abundance of man-made and natural attractions.

5.3 Hospitality Businesses

Table 19: Total Number of Tourism Businesses in Area

Venue	Accommodation	Catering	Visitor Attractions
Beaulieu Motor Museum	278	236	51
Brands Hatch	99	346	25
Goodwood	351	361	52
Thruxton	192	150	33
Leisure Pursuits	231	687	72
Lydden Hill	559	343	155
Ringwood	851	774	154
TOTAL	2562	2897	542
Average	366	413	77

Ringwood Raceway is by far the best serviced by accommodation, catering and visitor attractions. Whilst Goodwood and Beaulieu offer just under the average for circuits in the area, Thruxton has comparatively low levels of accommodation. Thruxton too has the lowest levels of catering provision of the circuits featured in the audit.

Brands Hatch has the highest attendance figures yet the lowest volume of commercial accommodation stock in the local areas.

As with Brands Hatch, Leisure Pursuits has a high number of catering establishments in proportion to accommodation.

Lydden Hill and Ringwood have the greatest number of attractions in their vicinity, compared with Brands Hatch and Thruxton who have relatively few. Leisure Pursuits, Beaulieu and Goodwood all have a fair share of other visitor attractions in the vicinity.

5.4 Additional Affected Business Services

Table 20: Other businesses

	Petrol Stations	Bus Services	Trains	Supermarkets	Department stores
Brands Hatch	7	0	Swanley 5 mls: Victoria 4xhr	4	0
Beaulieu	1	4	Brockenhurst 4 m: Waterloo 3x hr	2	3
Thruxton	9	1	Andover 3 m: Waterloo 2xhr	7	4
Goodwood	7	4	Chichester 2m: Victoria 6xhr	8	8
Leisure Pursuits	4	4	E. Grinstead 3m. Charing X. 2xhr	8	6
Ringwood	7	5	Bournemouth 7 Christchurch 4: Waterloo 2xhr	3	2
Lydden Hill	11	1	Canterbury 9m: Charing X 4xhr	11	7

Apart from Beaulieu all circuits are well served by petrol stations. Lydden Hill benefits from being near a major passenger Ferry Terminal and this accounts for the high number of petrol stations.

Bus services to the circuit are either non-existent (Brands Hatch) or basic (Thruxton and Lydden Hill). Ringwood is well connected by bus services, with Salisbury, Bournemouth, Fordingbridge and Brockenhurst all on a service. All the circuits are in relatively good proximity to a railway station with regular links to London and the coast. Lydden Hill at 9 miles from Canterbury is the furthest, whilst Goodwood, Thruxton and Leisure Pursuits are in the strong position of being only 2/3 miles from their respective stations.

There are no department stores within the zone of Brands Hatch. Only towns within a wider radius of Kent, such as Bromley, Ashford and Gillingham offer such a retail choice. All the other circuits have the advantage of being close to the many department stores and supermarkets in the Southampton, Canterbury, Brighton, Portsmouth and Salisbury conurbation.

5.5 Benefits to Hospitality Businesses in the district

This section of the report draws of data from interviews undertaken with a selected sample of tourism businesses identified from the audits.

Brands Hatch

The three main race weekends coincide with bank holidays and because there is a shortage of accommodation in the area most hotels tend to be very busy. Reservations are therefore vital. Hotels reported that between 5% and 8% of their annual revenue could be attributed to the major bank holiday events at Brands Hatch.

Hotels also reported that with more races involving only a day race rather than a weekend, guest were consequently only staying for one night.

Catering establishment contacted were found to generally report that Brands Hatch generated little business for them. In general, local restaurants or pubs were not found to be heavily visited by race-goers. This may be a reflection on the fact that many race-goers are day-trippers who are likely to head home at the end of the race rather than make use of local amenities.

Ringwood

Discussions with local businesses indicated that many felt they could be gaining more custom from visitors watching and taking part in races at Ringwood, but were currently not doing so as they felt they were not always aware of what events were planned to be held.

Hotels in the surrounding area in places such as Bournemouth and Lyndhurst were not found to attract race visitors as guests. Whilst accommodation establishments in Fordingbridge felt that they are too removed from Ringwood to gain from staying visitors.

Marketers at Matchman, were found however to gain considerable business from race-goers. The market is held each Sunday and is only a short distance away from Ringwood.

Thruxton

Hotels generally claimed to be very busy on the race weekends, with mid sized establishments reporting a doubling of occupancy. Race crews mainly occupy the bigger hotels, whilst many Guest Houses were found to have high levels of occupancy due to business guests from the bomb disposal site in New Tidworth which is often used for training.

A difference in opinion was found among publicans contacted with regard to the impact of Thruxton on business. Whilst one publican reported that race days caused a 7% improvement on annual turnover, another reported that they received few visitors from Thruxton. Another pub contacted in Andover regarded itself to be too far away to gain any businesses.

Leisure Pursuits Off Road Circuit

All hoteliers and restaurateurs/ publicans consulted in Tunbridge Wells, Crawley and East Grinstead were found to be unfamiliar with the Circuit. The hotels are generally used as venues for weddings and corporate hospitality and there is widespread ignorance of the circuit.

One hotel manager was keen to get more information on the circuit as a result of learning of it through the research in order to provide information on local activities for its guests. Other businesses which were surprised to hear of the circuit felt that they would benefit from having an event programme.

Beaulieu National Motor Museum

Special events, such as the AutoJumble (September 11-12 2004) and MotoMart (May 2005) bring streams of visitors to the area. Hotels contacted reported to be full over these weekends. Some hotels are guaranteed advance reservation from loyal repeat visitors.

At other times of the year some hotels provide incentives for visitors to the museums to choose their hotel to stay at. These include a discounted special bus service from the hotel to the museum and back and reduced room rates.

Restaurants contacted generally reported regular full houses, but were generally unaware of the origin of their guests and thus unable to comment whether the museum had a positive impact on business.

Goodwood

Small hotels reported little change as a result of the two race meetings at Goodwood, whilst one large hotel in Midhurst claimed to be booked a year in advance for corporate entertaining accounting for approximately 5% of its annual revenue. Another hotel contacted, which is located in Selsey, reported that they usually had an upturn in business during the two events.

The nearest accommodation to the circuit in Chichester only opens for the special events, where it is always fully booked. In Bognor Regis, one hotelier says that whilst it is full at festival time (the 2 weekends account for 2% of annual revenue), these very same people do not tend to use the restaurant facilities.

Local restaurants and bars reported that they generally expected more business on race weekends.

Lydden Hill

A number of businesses reported that since Maclaren bought the circuit 9 years ago the quality and frequency of racing has changed. The only small hotel still open reports that it has suffered an 80% loss in the last 9 years. Its restaurant and pub trade used to gain from the motor-racing visitors, but now as the type of visitor to the area has changed so the business has lost customers from Lydden.

The other factor that has had a serious impact on the success of hotel/ catering businesses in the Lydden hill area is the opening of the M20. This has taken traffic that would previously have gone direct from Canterbury to Dover via Lydden, on to a faster route through Maidstone and Ashford and via Folkestone. This has caused a major effect on passing trade.
The other hotel questioned in Dover said the racecourse had a negligible impact on its business, with occasional guests staying once or twice a month.

The motor sport venues in the region are generally well served by local hospitality and other tourism related businesses. Despite this, a mixed picture emerges regarding the impact of the venues on bringing custom to these businesses. Some businesses were found to be positively gaining custom from visitors attending race days and weekends, whilst others were found to be unaware of events and activities taking place at the motor sport circuits, whilst others were unfamiliar with the smaller racing circuits like Lydden Hill and Leisure Pursuits.

6 SUMMARY OF FINDINGS

The findings of this study have been used to form the basis of a SWOT analysis. This is presented below:

Strengths	⇒ The region has a flourishing motor sport industry. ⇒ The region has a historical legacy in automotives. ⇒ Major venues are located well within reach of travel and hospitality operators. ⇒ The region is an established holiday destination of overseas travellers. ⇒ The region has an above average number of high income households and key target markets for various branches of motor sport.. ⇒ Brand Hatch has close proximity to London ⇒ Attendance numbers to the Festival of Speed and the Goodwood Revival are on the increase. ⇒ Some two-fifths of the UK population are interested in motor sport. ⇒ British motor sport is internationally recognised.
Weaknesses	⇒ Region suffers from road congestion. Vast majority of visitors arrive in cars as public transport to circuits is poor. ⇒ Poor community relations – noise and traffic arising from race meetings has caused conflict with local residents. ⇒ Circuits operate on a stand alone basis - little joint working with other circuits, hospitality and leisure. ⇒ Constraint on capacity utilisation in that many events held at weekends or bank holidays, as participants and, particularly, marshals and officials (many of whom are unpaid volunteers) are unavailable in the week. ⇒ Less racing in the winter months due to poor weather. Consequently, circuits unused due to lack of demand. ⇒ Elitist and parochial culture evident among motor sport businesses. ⇒ Circuits see themselves in competition with each other. ⇒ Little investment in facilities to appeal to wider audience. ⇒ Decline of British teams and drivers leading to declining interest in Formula One. ⇒ Formula One heavily dependent on tobacco sponsorship.
Opportunities	⇒ Demographic factors favourable to the future growth of motor sport entertainment. ⇒ Growth of interest in ‘speed’ sports as part of changing lifestyles. ⇒ Spectators from overseas are among the highest spending group of all overseas travellers to the UK. ⇒ The historical legacy of automotive and motor sport in the region is a key attraction for tourism activity. ⇒ Circuits increasingly employing Business Development Managers – provides opportunities to forge new relationships with tourism sector. ⇒ Women, families and young people new growth markets. ⇒ Mutual awareness of benefits of joint working among operators and hospitality sector. ⇒ Interest in ‘Red Letter’ days, track days and corporate events increasing.
Threats	⇒ International competition as other nations develop their own motor sport industry. ⇒ Competition from other leisure activities. ⇒ Problems over sponsorship and lack of public funding. ⇒ Lack of awareness among consumers of racing events and related activities.

To maximise the tourism potential of motor sport, there is a need for a high degree of awareness among motor sport and tourism businesses of the mutual advantages of establishing alliances, co-ordinating planning and the sharing of resources and information. This study has found that a parochial culture pervades motor sports with many motor sport venues not seeing themselves as part of a broader motor sport tourism industry. At the same time many tourism related businesses fail to see that they stand to significantly benefit from motor sport events resulting in potential lost opportunities.

The study has found that motor sport tourism is lacking many of the vital elements found in a cluster but there is great potential for development. For example, the Motorsport Valley brand offers a unique selling point for motor sport tourism. However, simply having a brand is not sufficient to encourage the development of working alliances. To make it work, there is a need for successful brand management and this element has been missing.

Motor racing circuits are aware that they are facing increasing competition from other leisure options and that they need to innovate if they are to attract new custom. This opens the path for regional tourist boards and destination management organisations to work with circuits to maximise visitation and yield by developing appropriate tourism packages.

The proximity of the venues to key leisure day and tourism destinations is another key asset which needs to be utilised to develop appealing racing packages to existing and new customers. However, traffic congestion and poor public transport networks to and from motor racing circuits presents a poor image to visitors and this needs to be addressed by initiatives such as working with coach operators to develop transfers from accommodation/airports and railway stations.

Future co-operation and joint working will only arise if the parties involved can see the mutual benefits. Central to this will be raising the level of awareness of the benefits to be accrued among the industry. Where recent initiatives such as the Motorsport Valley Tourism Programme have been unsuccessful has been the insufficient attention given to the length of time and resources needed to engage successfully with the industry. Proposals will require concerted efforts of a range of agencies if they are to be successfully implemented. Half measures will be wasteful. Further funding from Government agencies will be required to drive forward change, whilst other agencies such as the MSA need to contribute towards resources such as freeing up staff time to focus on motor sport tourism actions.

In the next section a draft action plan is set out drawing on the findings of this study. The action plan is not designed to be a blue print. Its purpose is to inspire interest and suggestions over how to take forward the Motorsport Valley Tourism Programme into its next phase.

7. MAXIMISING THE TOURISM BENEFITS: DRAFT PLAN OF ACTIONS

The following outlines a tentative action plan to facilitate the establishment of motor sport tourism cluster groups or networks comprising the range of stakeholders in the motor sport tourism sector. It is felt that a number of smaller, more locality based cluster groups will be more effective in maximising and spreading benefits throughout the Motorsport Valley than one large group. The first step is the development of a strategic approach to provide industry co-ordination between what is a very diverse range of stakeholders involved in the motor sport tourism process

7.1 Industry Co-ordination

The lack of co-ordination is a major impediment to maximising the tourism potential of motor sport events and activities. A starting point would be the setting up of a Steering Group of national and regional players which will have the muscle to galvanise interest among motor sport circuits as well as the smaller speedways and the leisure and hospitality sector. It is proposed that the key players are the MSA, MIA, GMU and Regional Tourist Boards/DMO's representing the four regions of Motorsport Valley. RDAs may have an advisory role on the Steering Group.

The Motorsport Valley Tourism Programme began some important work in this area, but it was unable to engage sufficient interest among the wider industry. Consequently no further action plan has been forwarded following the end of the programme in 2003. In view of this, the initial task of the Steering Group would be to consult widely with representatives from the motor sport and tourism businesses across Motorsport Valley to inform an action plan with short, medium and long term objectives.

To be successful, it will be imperative that the Steering Group avoids 'top-down' approaches. Ownership of actions needs to lie with businesses and agencies at the 'grass-roots'. Securing commitment from grass root businesses and agencies will be key to turning actions into self-financing activities.

Each of the four regions will also need to take responsibility for taking forward actions in their own region. This will involve identifying and utilising existing resources (i.e. staff time, contacts) and expertise (research and marketing), and securing the necessary private and public sector funding to support specific action programmes, until such work thereof becomes self-financing. Each region will need to identify key champions and advocates to facilitate networks between motor sport and tourism businesses until these groupings develop into fully fledged clusters which will be less reliant on support from guiding agencies.

Some of the issues the Steering Group will need to work on are presented in the following sections. The issues have been drawn from the findings of this study.

7.2 Areas for action

To facilitate linkages there are a number of areas that need addressing. These are discussed below.

7.2.1 Communication and Information sharing

Our research has identified that local businesses are often unaware of motor sport events and activities that take place in their vicinity and as result are losing out on potential business opportunities. At the same time, many motor sport entertainment venues are unaware of the tourism businesses which are in the vicinity.

Actions:

⇒ Distributing calendar of events. Whilst distributing hard copies of calendar of events to every tourism business in an area is neither financially feasible or practical, motor sport venues should be encouraged to make contact with local tourism business groupings such as district level accommodation forums and Local Authority Tourism Departments, as well as national and regional membership associations such as the British Hospitality Association and Regional Tourist Boards. These organisations can act as a conduit through which information on events can be advertised to members through newsletters and website based event fixtures.

⇒ Develop region specific database of motor sport and tourism businesses. It is a considerable undertaking for one organisation to be responsible for gathering and continually up-dating information on the database. It is better undertaken at a regional level by regional agencies such as the Regional Tourist Boards/DMOs who will have existing databases on which to build and will have better local knowledge of the existence of old and new businesses. Access to the database will need to be provided online. This is one area of development for wwww.motorsportvalleytourism.com.

⇒ Facilitate access to research findings and resources. There is a dearth of information on the profile of visitors to motor sport events. Some information is available but the problem appears to be that the information is not being shared or that businesses are unaware of the existence of relevant research and market intelligence. Unless addressed this will hamper product development and targeted marketing strategies. One of the initial roles of the Steering Group should be to make available relevant research, statistics and market intelligence which may be helpful for business planning purposes.

⇒ Sharing post-code data. A great deal of information on consumers can also be gleaned through an analysis of where they have come from. There are a number of segmentation software packages which use post-codes to distil information on the socio-demographic and lifestyle profile of consumers most likely to be interested in motor sports and motor sport tourism packages. This provides for more detailed segmentation and targeted marketing than pulling data from national surveys. Motor sport venues should be encouraged to share post-code data so that they are able to compare customer profiles and identify visitor groups who will be most receptive to particular types of racing packages and promotional offers.

7.2.2 Marketing & Brand Management

The area where greatest economy of scale can be achieved through a cluster approach is in marketing. Motor sport and tourism businesses share the same objectives – to get more custom from visitors. This means joint marketing efforts to produce promotional offers which will attract a broader audience than the traditional motor sport enthusiast. Local Authority tourism departments and Regional Tourist Boards can provide advice and facilitate partnership working.

Related, is the issue of ‘brand’. Destination branding has long played an important role in attracting visitors to an area. ‘Motorsport Valley’ offers a unique selling point for motor sport tourism, but it is questionable whether the brand has any resonance with businesses outside of motor sport and with the general public. To effectively capitalise on the brand there is a need to begin by ‘positioning’ the brand in the wider market place and testing consumer receptiveness. Responsibility for managing the brand will also need to be addressed by the Steering Group.

Marketing goals:

⇒ Short term: boost day attendance.
⇒ Medium term: develop holiday and short-term motor sport tourism packages appealing to different segments
⇒ Long-term: reach out to new markets, i.e. women, families, and ‘lifestyle’ groups.

Actions:

⇒ Develop promotional tactics and campaigns to raise awareness, interest and influence purchasing decisions. This may involve a time limited marketing campaign through a partnership working with motor sport businesses, accommodation providers and destination management organisations at local and regional level and VisitBritain at national level.

⇒ Work with tour operators to develop tailor made holiday and short break packages involving aspects such as purchase of tickets, accommodation, transfers and hospitality.

⇒ Develop ‘lifestyle’ approach to marketing motor sport tourism. For example, for widening market for experience days, marketing could focus on a young cosmopolitan segment and use themes such as ‘free-spirited’, ‘clubbing’, ‘active pursuits’, ‘excitement, adventure and fantasy’ and ‘café culture’ to appeal to this segment.

⇒ Promotion of region as a destination for a holiday featuring motor sport activity. For example, in Australia the Gold Coast Indy Car race is deliberately designed to showcase Australia's premier beach destination – the Gold Coast. Special events and festivals celebrating motor sport heritage in the regions. Similar marketing strategies should be considered for Motorsport Valley.

7.2.3 Service quality and value for money

To maximise the number of domestic and overseas visitors to motor sport events and encourage repeat visits, maintaining a reputation for service quality will be a central factor. Changing consumer trends means that no business can afford to ignore the quality of their service and the value for money it offers. The latter does not simply imply gaining the most for the lowest price but the 'worth' consumers place on their experience be it watching a race or taking part in the array of motor sport activities available for the general public.

Consumer research indicates that we are seeing the disappearance of the typical loyal customer who irrespective of relative price and quality adheres to traditional, habitual and repetitive purchasing decisions and behaviour. Customers have become more choosy, fickle and disloyal to their traditional suppliers. Motor sport is no exception in this regard. Satisfying customers means having quality management systems in place where quality is perceived from a customer's point of view rather from management.

Actions:

⇒ Motor sport circuits may want to consider joining accreditation schemes such as VAQAS[9]. The Steering Group should review whether VAQAS is appropriate for circuits or whether a new standard needs to be developed specifically for the sector. MIA have put forward a proposal to pilot a new scheme called QUEST. This will need to be reviewed.

⇒ Motor sport circuits should also consider techniques such as Mystery Shopping to establish benchmarks, develop quality standards and monitor customer satisfaction.

⇒ Motor sport circuits need to ensure that support services such as cafe's and toilets are good. Quality retail and catering are crucial part of the visitor experience.

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[9] Visitor Attraction Quality Assessment Scheme

APPENDIX 1

List of Hotels/ Catering establishments consulted

Brands Hatch
Hill Top Hotel (2 miles)
Castle Hotel (3)
Royal Oak (Sevenoaks), Mr Young
Chequers Inn – Swanley
Da Vinci – Orpington

Ringwood
Dormy Hotel – Ferndown
Carrington House Hotel – Bournemouth
Bulmer Lawn Hotel – Miss Young
Lyndhurst Park Hotel
Churchill Arms , Fordingbridge
Rainbow Fish bar, Brockenhurst
Rendezvous, Lyndhurst

Thruxton
Wessex Hotel, Winchester
Essebourne Manor, Andover
Baine Valley Inn, Andover
East manor House, Andover
George Inn, Stockbridge
Chestnut Tree, Andover
Tally Ho, Stockbridge

Leisure Pursuits
Swan Hotel. Tunbridge Wells
Little Foxes, Crawley
Cranfield Lodge Hotel, East Grinstead
Portofino restaurant, East Grinstead
Jade Garden, East Grinstead
Mamma Mia, Redhill
Rumours wine bar, East Grinstead

Beaulieu
Admiral House, Lymington
Angel Inn, Lymington
Crown Hotel, Lyndhurst
4 Seasons Hotel, Hythe
Fusion Inn, Lymington

Goodwood
Ship Inn, Itchenor
Coach House, Chichester
Royal Hotel, Bognor Regis
Park House Hotel, Midhurst
St Andrews Lodge, Selsey
Fox & Hounds, Chichester
Platters Restaurant, Chichester
Woodies wine bar, Chichester

Lydden Hill

Old Coach House Hotel, Barham, Canterbury

Swingate Inn, Dover

Motor sport venues contacted for information

Goodwood, Mr R Widdows, Press and public relations (motorsport)
Ringwood Raceway, Ms D Houghton, Marketing Manager
Brands Hatch, Mr A Bothwell, Press and public relations
Thruxton Cicuit, Mr I Watson, Business Development Manger
National Motor Museum, Beaulieu, Mr S Munn, Commercial Director
Leisure Pursuits Off Road Centre, Ms E Eichner, Manager
Lydden Hill Circuit, Mrs Santer, Manager

APPENDIX 2

Mystery Shopping Visit Results

Visits to:

- Goodwood. Goodwood Revival Meeting. Sunday 7th September 2003. 10.30am to 4.30pm.
- Brands Hatch. Round 11 of the British Superbikes. Sunday 14th September 2003. 9.00am to 4.00pm.

1. Signposting to the venue

	Goodwood	Brands Hatch
On a scale of 1-5 how easy/difficult was it to find the venue?	5	5
Approx. how many miles from the venue did signposting start	Event: 5 miles Circuit: 2 miles	Circuit: 10 miles
Did signposting provide additional information e.g. traffic news	Yes	Yes

Signposting to the Goodwood Revival meeting involved signs for the event itself as well as for the circuit. Signposting for Brands Hatch starts as soon as any motorways in the area are left (e.g. M25, M26, M20), with sufficient signage along A20 to venue.

Both venues provided additional information.

Goodwood Radio was sign posted from 1 mile out. The radio was for race commentary only and did not provide traffic information.

Signposts at Brands Hatch provided details on which car parks to use. Brands Hatch also had radio which did provide traffic information. However, this was only discovered once inside the venue and therefore more relevant for leaving the area.

2. Car Parking

	Goodwood	Brands Hatch
From the time of arrival, time in minutes it took to find a suitable car park with available spaces and park	Immediately on arrival	Immediately on arrival
Type of Car Park used	Grass	Grass mainly (some tarmac)
Accessibility of car throughout duration of visit	5	3

Parking at Goodwood was felt to be very well organised with plenty of Marshal's. Metal tracking was laid down along main routes into and around car park, with aisles consisting of grass. Aisles were numbered to enable car to be easily found. In addition hands were stamped for re-entry in order to be able to return to cars throughout the day.

Car parking was in less demand at Brands Hatch due to the nature of the event. 60-70% of spectators were estimated to have travelled by motorbike. The car parks were large, hilly fields next to circuit. It was possible to pay extra and park inside the venue along race track. It was relatively easy to get in and out of the venue apart from the large volumes of people.

3. Queuing time and ticket office

	Goodwood	Brands Hatch
Time in minutes to reach entrance/ticket office from car park	5 mins	5 mins
Time taken to pass through ticket office	2 mins	3 mins
Signage at ticket office	1	1
Acknowledged within 10 seconds of arriving at ticket office	Yes	No
Were question(s) answered politely and satisfactorily	Yes	Yes
Staff courteous at end of contact	Yes	Yes

There was no signing from the car park at Goodwood to the main ticket office, only from the car park exit. It was also found to be difficult to push a pushchair along the grass car park at Goodwood. Separate queues were signed at Goodwood for the varying types of tickets as well as ticket prices. On arriving at the ticket office member of staff smiled and made eye contact.

4. Aesthetic appeal

On a scale of 1-5 was the venue….	Goodwood	Brands Hatch
Generally clean and tidy	5	4
Have well maintained buildings and grounds	5	4
Free from litter on the floor	5	4

Buildings and grounds in general appeared clean and well kept at Goodwood. Rubbish bins consisted of large oil barrels which people were readily using.

Considering the numbers of people attending Brands Hatch, the type of venue it is and the type of event taking place, the venue was mostly litter free (although noticeably more litter throughout the day). Buildings were well maintained.

5.1 Arrival at Grandstand Seating areas (Brands Hatch only)

	Brands Hatch
Difficulty in finding seat	3
Acknowledge within 10 seconds of arriving at seating area	No
Question answered politely and satisfactorily	Yes

There was a lack of information at Brands Hatch for a visitor who had not been before and had a lack of knowledge about which seats were located where and which areas were reserved for who. The tickets were checked for the seating area after approx. 5 minutes with an offer of refreshments.

5.2 Grandstand seating areas – General

	Brands Hatch
Were grandstand seating areas clean	Yes
Were grandstand seating areas free from graffiti, chewing gum etc	Yes
Were grandstand seating areas well maintained	Yes
Standing on clean, litter free ground/pavements	Yes
View from grandstand seating areas	4
Comfort of grandstand seating areas	3

The grandstand and hospitality areas at Brands Hatch were generally very clean, but deteriorated throughout the day. The main stand looked fairly new, with older benches in front. The seating was typically plastic seats or wooden benches. Most of the circuit in use (Indy circuit) could be viewed from these areas.

At Goodwood it was acknowledged that views from grandstand areas were far better than from public seating areas. Large screens were located in front of the main grandstands so visitors could see what was happening on the rest of the track. The seating appeared to plastic seats with adequate leg room for the type of venue.

5.3 Public Seating areas

	Goodwood	Brands Hatch
Was public seating Clean	Yes	No
Was public seating free from graffiti, chewing gum etc	Yes	Yes
Was public seating well maintained	Yes	?
Was public seating standing on clean/litter free ground pavement	Yes	Yes
View from public seating	3	4
Comfort from public seating areas	N/A	2

Public seating to view races at Goodwood was on grassed areas only and it was observed most people took their own seats or blankets. Grass areas were found to be well kept and the gravel walk way was reasonably level, although difficult for wheelchairs and pushchairs. Visitors were only able to view part of the track from their seating area and it became difficult to see the action from popular locations.

Apart from the permanent grandstand and hospitality suites at Brands Hatch, seating or standing was on grass or gravel banks. Pictures of the site do indicate areas where temporary seating can be erected for larger events (see spectator guide). Most grass/gravel banks were found to be well maintained, with the exception of those in the furthest areas from the pit lane. The view was mainly very good, being an undulating circuit. However as with Goodwood the key areas were extremely busy. Some of the gravel areas were extremely uncomfortable (but these appear to be the areas temporary stands would be positioned).

5.4 Shelter

At both venues it was observed that there was not sufficient shelter away from grandstand areas.

At Goodwood the only shelter available was in some catering outlets and shops.

At Brands Hatch very little shelter was observed, apart from at a few catering outlets. The main grandstand also had no roof.

6.1 Public Toilets

	Goodwood	Brands Hatch
Were there enough public toilets and were they located at suitable locations	Yes	Yes
Was there sufficient signage to ensure easy finding	No	No
Quality of public toilets	4	4

Toilets at Goodwood were marked in the programme, but were not well sign posted. The toilets were temporary facilities and were relatively clean, even as the day progressed. Toilets had sufficient supplies of toilet paper and soap.

At Brands Hatch there was a mixture of permanent toilets and temporary facilities, combined there was an adequate number. Only maps of the circuit were displayed (without location of toilets), however, toilets were located at enough sites not to require specific signage. The toilets were found to be good considering the amount of people using them. Mostly clean and the larger (permanent) ones were cleaned throughout the day.

6.2 Baby change/feeding facilities

At Goodwood no baby changing of feeding facilities were seen except for maybe in the crèche area.

A single facility was seen at Brands Hatch in one of the permanent catering facilities.

6.3 Telephones.

No public telephones were seen at Goodwood and none could be found on the map or in the programme.

Although no signage to public telephones at Brands Hatch, plenty of phones were located next to information point and main restaurant/toilet block which were working.

7. Retail/Shops

Scores out of five	Goodwood	Brands Hatch
Range of goods on sale	4	3
Quality of goods on sale	4	5
Value for money of goods on sale	3	?
Friendliness of staff at retail outlets	4	4
Speed of service	5	3

At Goodwood items on sale mainly included merchandise relating to the actual event or sporting memorabilia / antiques. The goods appeared of good quality but all slightly over priced.

At Brands Hatch items on sale mainly included biking equipment, event merchandise, with a few racing/biking memorabilia shops and stalls. All the top brands had stalls, including all the major sponsors e.g. Virgin. It is unknown how prices for biking goods compare to those on the high street. Staff at retail outlets appeared friendly and polite considering the number of customers dealing with. Service was as fast as it could be, but with time taken to explain issues to customers.

8. Catering

At Goodwood there were plenty of food outlets with a very big choice of food to eat. There were no specific signs to catering areas, however they were not really required as catering was located in one visible area. The catering area was marked on the map in the programme. The quality of the food was good for such an event, however, some of the portions were small. Food was found to be extremely over priced. Staff were very busy and did not have the time to be friendly, the impression was that these were contract staff who did not work directly for Goodwood. Service appeared to be reasonably fast.

	Goodwood	Brands Hatch
Number and range of outlets (out of 5)	5	2
Numbers and types of outlets available….		
Fish and Chip stalls	At least 1 of each	2
Burger/Hot dog/chip vans		10 to 15
Other Fast food…please list	Bacon Butty vans Pies/pasties Sandwiches/Baguettes Baked Potatoes x At least 1 of each	Sandwiches / Baguettes (Uppercrust) x2
Sit down café / tea room	At least 1 of each	2
Restaurants		Only in V.I.P areas
Outlets offering Vegetarian food		0 were seen
Other…..please list	Ice cream vans Coffee shops Local produce stalls Fresh fruit Wine Bars Sweets Pimms bar x At least 1 of each	Ice cream vans Donut stalls X 2/3 of each
Was there signage to catering outlets	No	No
(Out of 5) Range of food and drink on sale	5+	2
Quality of food and drink on sale	4	3
Value for money of food and drink on sale	1	2
Friendliness of staff	2	2
Speed of service	4	3
Example of prices	£1.50 for single cone ice cream £2 portion of chips	£2.60 for a burger £1.50 bottle of water £1.50 chips

At Brands Hatch there was a poor range of catering outlets, not only of what was on sale, but of the number of companies present (mainly one company). There was sufficient numbers of outlets to cope with the large attendance and they were located all round the circuit, however all mainly the same, selling the same limited choice of burgers, hotdogs, chips etc.

Uppercrust outlets all that were seen to be different. Cafes very busy, but did provide a greater range of food. No vegetarian outlets were seen, but it is presumed vegetarian food was available form the Cafes. Other food outlets mainly concerned providing sweet items such as donuts and ice cream. There was no need for signage to catering outlets as they were located at sufficient points. There were signs to cafes. The food was of a relatively good standard. Food was considered to be over-priced but comparable to similar sized events.

9. Event Programme / magazine

The Goodwood programme was very expensive at £7.50. The main programme had to be bought in order to get a list of races for that day. Would not have been so bad for the full 3 days. Not possible to get a few brochures listing the races and one main programme, which would have been more cost effective for larger groups. Sellers only handled cash, i.e. no cheques, impossible to obtain a receipt for payment. Brochure was very easy to follow. The only other aspect of motorsport that could be seen in the programme was about an auction at the event. The Goodwood programme contained lots of advertising. It held no information on other facilities/attractions/accommodation in area.

	Goodwood	Brands Hatch
Value for money	2	4
Information in programme on event attended	4	4
Information in programme on other aspects of motorsport	1	2
Did it mention other events meetings at other venues	NO	YES
Information on attractions in surrounding area	0	0
Information on facilities in surrounding area	0	0
Information on accommodation in the surrounding area	0	2

The Brands Hatch programme was good value at £3, with plenty of reading and information. Information was given for novices to such events about the races and the season so far. Programmes also gave race histories and had interviews with main contenders. It only covered motor biking and in particular the British superbikes. Information tended to concern other events/meetings being held at other Octagon* motorsport venues (i.e. Brands Hatch, Silverstone, Oulton Park, Snetterton and Cadwell Park) or others in the current British superbikes series. A free spectators guide also had lots of information about other venues controlled by Octagon motorsports including events and accommodation. The only accommodation in the main programme was linked to the next British superbikes events (not in Brands Hatch area). More accommodation was available in the free spectators guide for each motorsport venue operated by Octagon motorsports.

*A press cutting from the 9th January 2004 indicates Brands Hatch and other venues operated by Octagon motorsports at the time of visit in 2003 have a new owner. Motorsport Vision has recently brought Brands Hatch, Oulton Park, Cadwell Park and Snetterton. Motorsport vision brought the venues off the Interpublic group of companies, who now only own Silverstone (British Grand Prix). It is believed Octagon motorsports are a subsidiary of Interpublic.

10. Disabled Facilities

	Goodwood	Brands Hatch
Were their facilities for disabled parking	Yes	Yes
Accessibility for disabled (out of 5)		
At Ticket Office	4	4
Toilets	?	4
Catering and retail outlets	3	3
Grandstand seating areas	5	2
Other viewing areas	5	2
Sufficient Tarmac areas	See Notes	No

At Goodwood disabled parking was provided in a separate area, next to the entrance gate. However the ground from car park into circuit was uneven and therefore difficult for wheelchair users. The main catering area had a surface suitable for wheelchair users, areas in the centre of the track had a lot of areas suitable for wheelchair users. However, it would be difficult for a disabled person to get around the outside of the circuit to other stands and viewing areas as the route was along an uneven gravel track. The catering and retail outlets at Goodwood had high counters and were tightly packed together with tables and chairs which makes manoeuvring around them difficult. Goodwood provided specific areas allocated to wheelchair users to the sides of main grandstand areas for viewing. These areas were provided free of charge.

At Brands Hatch disabled parking facilities were not immediately visible but disabled persons could park in areas within the circuit. The main ticket office/entrance was all tarmac and the main or permanent toilet facilities had disabled access. The cafes had ramps for wheelchair access at Brands Hatch, however the fast food catering outlets had high openings. The Grandstand had no visible disabled areas. The open viewing areas were mainly grass/gravel areas and very undulating. Wheelchairs users would be limited to tarmac areas. Cables across these areas would also hinder wheelchair access.

11. Other Attractions

	Goodwood	Brands Hatch
Other attractions on offer (Yes/No)		
Children's play area	Yes	Yes
Museum / display area	Yes	No - not visible/advertised
Funfair	Yes	No
Rides	Yes	Yes
Other …	Vintage air display Walk of paddock and pit lane Classic car auction (additional fee) Marching bands Model railway and scalectrix displays	Go Karts Quad Bikes Shops Memorabilia stalls Walk of paddock and pit lane Ride in safety car around track
Other facilities on other (Yes/No)		
Crèche	Yes	No - not advertised
Commentary facilities	Yes	Yes
Umbrellas for hire	No	Yes
Others…..	Scooter hire Tractor rides to outlying stands Radios for hire (interviews and commentary) First aid points	Areas for BBQ's First aid points

At Goodwood the children's play area was incorporated with the crèche and was therefore only accessible if you paid. There were lots of period cars on display for people to view. Other displays included dads army group, laurel and hardy and old fashioned police. The fairground at Goodwood was enticing for children but over priced, with rides at £1.50 per person. On the Carousel you had to pay for each person, even if a child was riding the same horse as parent (often children too small to go on their own so only pay for adult).

Rides and attractions at Brands Hatch included Bouncy Castles, Motion simulators and rides in the safety car around the track. The commentary at Brands Hatch came over the loud speakers and through FM Radios, which could be purchased on site. Very interesting and informative. Speakers located all around race track and very clear. Very helpful to a novice. The umbrellas were available in hospitality suites and grandstand areas.

12. Advertising

The only other future advertising at Goodwood related to other car auctions at other venues, located in the programme.

At Brands Hatch, event calendars were located in the programme and spectator guide. Regular announcements were made from loud speakers and events were advertised in the information centre. The advertising mainly concerned future British Super Bike events or those held at Brands Hatch.

	Goodwood	Brands Hatch
Was there advertising of future events at the venue	No	Yes
Was there advertising of future events at other venues	Yes	Yes
Location of advertising (Yes/No)		
Car Park	No	No
Ticket Office	No	No (Yes at info centre)
Toilets	No	No
Grandstand	No	No
Retail and Catering outlets	Yes	Yes
Programme	No	Yes
Track areas	No	No
Others………		Yes Commentary Sponsors vans

13. Staff Knowledge of other tourism businesses – Local accommodation

13.1 Goodwood

Q. Our daughter is very tired and we have decided to try to stay in the area and travel home in the morning.

I asked the question at the information centre as when I approached staff at the ticket office and at the programme sales desk I was directed to the information centre.

The lady who dealt with my question was very polite and courteous. She had a very caring attitude. She gave me a guide to the area that had accommodation listings in it but advised me that most would be booked up due to the event. She offered me use of the telephone in their office (free of charge). There was a map in the guide showing locations of accommodation.

Q. Asked whether there were any other places worth seeing in the area that would suit a family.

Advised that there were lots of things to see and do and that they would all be listed in the guide that I had been given about the accommodation. Also marked on the map in the guide.

13.2 Brands Hatch

Q. We are staying in the area for a few days on holiday, do you have any information on local accommodation ?

Asked this question at the information centre. When talking to other staff members, who were generally friendly and helpful, they generally said the information centre is the best place to find out. Information centre very busy throughout duration of visit. Were told the Thistle hotel, at the entrance would be full for the next few days. Could also provide simple directions to camp sites in the immediate area. Could not provide anything else specific, but were told where T.I.C's could be found and that they were the best places to try. Were given the opportunity to use the phone and phone book. Did comment on Holiday Inn and Travel Lodges etc on the various travel interchanges. Given free spectator guide which had hotel information in it.

Q. Are there any places worth seeing / visiting in the area if we are staying for a few days

Again asked at information centre, too busy too deal with the question in detail, but facilities were made available to contact local T.I.C's. Held no brochures on the area.

In general to both question were as helpful as possible, considering how busy they were and the range of questions being asked of them by visitors.

14. Overall meeting of expectations

14.1 Goodwood

A very busy and popular event with more families than I expected. Lots of people dressed up in period costume. Racing was good and so was the commentary as the interviews exceeded expectations. Thought there would be more screens to see action on the rest of the track. Thought there would be more shelter. Plenty of ancillary activities to keep people busy if not keen to sit and watch races. Mix of cars and bikes was good. Very well organised event. Range of food available was exceptionally good. All races ran to time schedule.

14.2 Brands Hatch

The crowd at this event consisted largely of bikers, who had travelled to the event on bikes, remained in their bike gear for the day and spent a lot of time looking around various stalls on bike equipment. Not really family orientated, but were many father and son groups.
A very busy and very popular event, which had attracted people who were really engaged in the event and had obviously been following this BSB season through TV or at other race venues. However, facilities were available for a novice to get up to speed on the season and racing in general. Brands Hatch looked 'rough and ready' away from the main areas.
A very friendly welcoming and inclusive atmosphere irrelevant of experiences with motorbikes.

15. Overall enjoyment of visit

15.1 Goodwood

Really enjoyed day even though it was very tiring. We were very lucky with the weather, as it would not have been enjoyable in the wet, especially with children. Being able to sit and have picnic whilst watching superstars race by on classic bikes and in cars was really good. The air display was brilliant. The whole atmosphere was of people enjoying themselves. Quite big queues to get to circuit, but this was to be expected as situated in rural location and only one main access road. Organisers had made a huge effort to have the event look in keeping with the period it was recreating. People who have classic cars and belong to Goodwood Road Racing Club could park next to circuit and it was interesting to look at peoples private cars.

16.2 Brands Hatch

A very enjoyable and interesting day out despite a lack of advanced knowledge of the seasons races, Brands Hatch, and events of this nature. Races and practices were continuous throughout the day, so there was always something to watch / do.
However, not a lot else apart from motorbikes and associated industries – would anything else be expected though ? Very good weather helped. There was no shelter if weather was poor. Experienced little problems with traffic. Would have expected this too be worse.
Queues at catering outlets.

16. Likelihood of recommendation

16.1 Goodwood

A lot for people and families to do even though if they aren't too interested in motor sports. Would have to have somebody in party who was interested to make it worth the money to go in though. An interesting day out especially seeing everybody dressed up. Would probably not recommend highly to somebody in a wheelchair or someone who does not have an off-road pushchair, as you would be limited to how far you could wander. Quite noisy at times for children (cars more than bikes). Would recommend people dress up if they went as it would make it more fun. Make sure people take umbrellas and rain coats just in case.

16.2 Brands Hatch

Would recommend highly to people with any interest in motorbikes and general racing fans. However, not a lot for children / partners / non-enthusiasts to do if not watching races. People would have to be prepared to deal with large numbers of people and queues at peak periods. Also be prepared for some low comfort on gravel and grass embankments.

17. Overall value for money

17.1 Goodwood

Quite a lot of money for the day, especially for a family. Would be too expensive for a family to go in a grandstand (even though prices are comparable to other events) or come for the whole three days of the event. Due to the cost it is something that you would not be able to afford to go to every year. Would expect the price needed to be dropped to continually get repeat business. Would recommend people to bring their own food and drink, as although the range was fantastic it was very expensive. Would advise people with children (especially if they had more than one) to try to avoid fun fair as too expensive.

Would be a great day out for any motoring enthusiast.

17.2 Brands Hatch

Ticket prices were reasonable for the calibre of races been viewed and the chance to meet the riders. With an interest in the motorbikes and races the event offered a full days entertainment. However, to bring partners and the family would be expensive if they do not share the same interest. Unsure if family tickets were on offer.

Food was over priced but no more so than at other large, popular events where choice is limited once inside the venue.

18. Additional Comments

18.1 Goodwood

Need to provide more shelter. A lot of people nowadays take their dogs with them when they go away and there were no facilities in the car park for people with dogs. It is accepted that you would not take a dog near the circuit because of the noise and crowds but there could be sheltered parking for people with dogs. Also areas to walk them, dog mess bins and the provision of water. The Eden Project is a good example.

18.2 Brands Hatch

Many aspects which may be considered negative, need to be viewed in terms of the need for them at such events and venues. For example, the lack of goods on sale which were different to motorbike equipment. If it was different would there be a demand for it? Would there be sufficient demand for other attractions.