Rossendale Tourism Study

Rossendale Borough Council

Final Report

August 2010

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EXECUTIVE SUMMARY

Introduction

i. In February 2010 Rossendale Borough Council (the Borough Council) and Lancashire County Developments Limited commissioned an assessment of the existing and potential contribution of tourism to the Rossendale economy, and the consequent spatial policy implications.

ii. The aim of the assessment is to provide robust evidence to underpin and inform the Local Development Framework (LDF). It is one of the key pieces of evidence for the preparation of the LDF, and more specifically, the Core Strategy.

iii. The principle objectives supporting this aim are to:

- Review the current range of visitor attractions and events in the Borough, together with the relevant supporting infrastructure
- Provide an overview of the tourism market, estimating the current and future economic benefits of visitor attractions and supporting infrastructure
- Assess the strengths, opportunities and constraints of the current and future tourism offer in Rossendale
- Identify potential growth sectors, the main supporting infrastructure required by those sectors, and the likely economic benefits of their growth
- Provide recommendations setting out the implications for local policy and the actions required by public and private sector partners.

iv. BE Group, regeneration, planning and property consultants, was appointed to undertake this work. BE Group was supported by Pan-Leisure Consulting Limited.

Process

v. The process of undertaking the assessment has encompassed a wide range of activities aimed at:

- Understanding the national, regional, sub-regional and local planning policy perspective
- Appreciating the trends and forces at work, both locally and in the global tourism economy
- Identifying the needs and aspirations for the future
- Setting the direction and mechanisms for meeting the requirements.

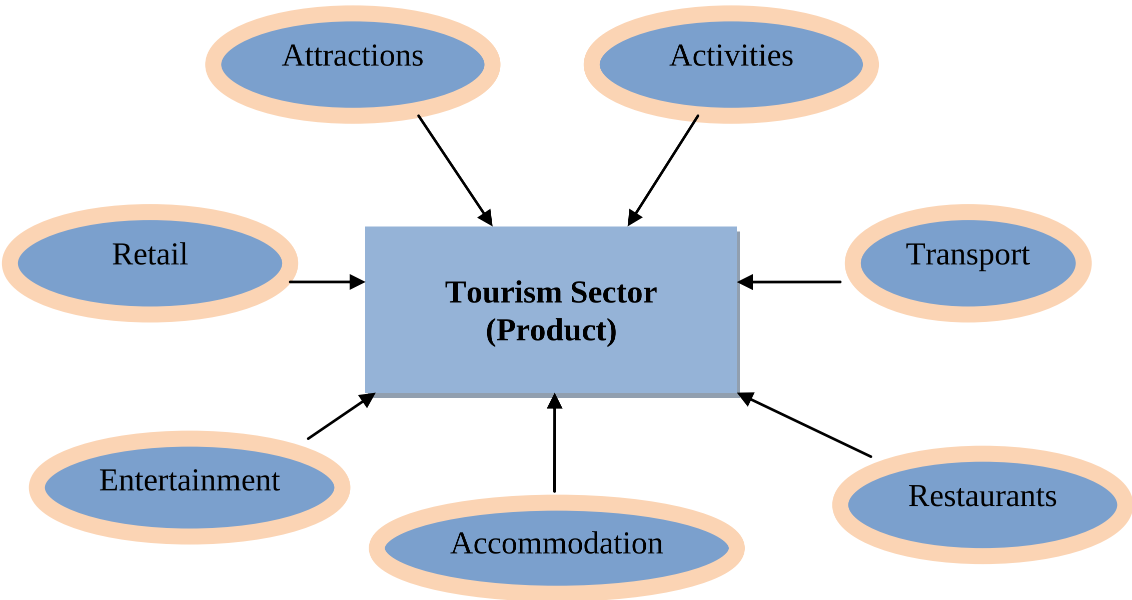
vi. Key elements of the process have included:

- Technical research of local, sub-regional and national material on the volume and value of the tourism economy, and related planning policy
- Local area analysis of visitor attractions, events and supporting infrastructure relating to the tourism sector
- Consultation with local stakeholders, including a questionnaire survey (to 106 visitor attractions, event managers and associated businesses) and workshop (to discuss strengths, weaknesses, future opportunities and threats).

Findings

vii. Rossendale's tourism offer comprises a number of supply side elements. These are summarised in Figure ES1.

Figure ES1 – Tourism Sector – Supply Side Elements



viii. The demand side comprises four primary sectors, namely tourists/visitors utilising serviced accommodation (hotels, guest houses); non-serviced accommodation (camping, caravans, bunk houses); those staying with friends or relatives, and day visitors.

Existing Attractions

ix. Current attractions and events are heavily influenced by the Borough's industrial heritage and natural assets. Heritage attractions include a number of museums and heritage centres, foremost of which is Helmshore Mills Textile Museum. The East Lancashire Railway attracts the largest number of visitors (circa 105,000 per annum). In the See Gallery and Bamboo Theatre there are cultural venues of national and international renown.

x. Natural assets also contribute to the attractions. The outdoor dry ski slope at Rawtenstall attracts 50-70,000 visitors. Other significant outdoor sporting activities include Lee Quarry mountain biking centre; Whitworth water ski; Cowm Leisure motorsport. These adrenaline sports are augmented by a range of equestrian facilities and long distance bridleways, footpaths and cycleways that capitalise on the Borough's geography and topography. Art in the landscape features through sculpture trails as well as the iconic Halo Panopticon.

xi. Although most of these represent niche markets they are less competitive than many mainstream activities, allowing Rossendale to capture a significant market share.

xii. The food and drink sector is a growing contributor to Rossendale's attractions. The Taste Lancashire and Taste International programmes have generated a nine fold increase in accredited venues in the past year. Taste International, having been pioneered in Rossendale is now being rolled out as a national initiative.

Supporting Infrastructure

xiii. The Borough has a limited accommodation offer. There is only one hotel (locally owned) and whilst bed and breakfast facilities trade well the offer is limited in numbers. There are supply gaps associated with hotels, caravan and camping sites, bunk houses and youth hostel accommodation. There is a lack of provision at strategic stops along the long distance trails that pass through Rossendale. This discourages long distance walkers, riders and cyclists from stopping (and spending) in the Borough.

xiv. Most visitors arrive by car, a reflection of the physical isolation of many of the attractions, but also the lack of public transport options.

xv. Visitor spend data shows the importance to the local economy of retail and catering (these account for 53 percent of the total visitor spend), but the tourism audit identifies only a small number of shops are marketed towards visitors. This is exacerbated by concerns of the condition of the general built environment and town centre offer particularly in Rawtenstall and Bacup.

Volume and Value Data

xvi. The latest data (2008) suggests around 1100 people are directly or indirectly employed by the tourism sector. Numerically this is the least of any North West local authority area, but in percentage terms (7.1 percent of the workforce) is similar to the regional average of 7.2 percent.

xvii. The limited nature of the accommodation offer is reflected by the jobs it generates. At 8.6 percent of the total sector, this is only just over half the regional average, and is less than one-third of the sub-regional figure.

xviii. The Borough attracted 2.17 million visitors in 2008, generating a total of 2.34 million visitor days. There is an underlying trend of a small annual incremental rise in the length of the average stay – due especially to growth in the non-serviced accommodation sector.

xix. The share of visitor days associated with accommodation is only 1.7 percent, with day visitors generating over 87 percent of the total. This contrasts with both the sub-region and region, where accommodation sources 24 percent and 16 percent respectively of the total visitor days.

xx. Current annual spend is around £67 million, equating to per capital population revenue of £998. Again this is substantially below the sub-regional (£2143) and regional (£2123) figures.

xxi. The weakness of the accommodation sector reflects in the visitor spend analysis. It represents only 6.3 percent of Rossendale's total. Comparable figures are five and eight times higher respectively for the North West and Lancashire and Blackpool sub-region.

xxii. The average spend per trip at £31 is two-thirds of the regional figure and only 60 percent of the sub-region.

Issues, Constraints and Opportunities

xxiii. The following table (Table ES1) summarises the findings from the audit of the current tourism offer.

Table ES1 – Rossendale Tourism Offer Issues, Constraints, Opportunities

Issues	Constraints	Opportunities
• National planning policy guidance states most tourist accommodation should be in or adjacent to existing towns and villages but this may not be appropriate for the demand characteristics of Rossendale's offer • Planning policy needs to recognise diversity of tourism – not to adopt 'one size fits all' approach • Need to improve quality of the tourism offer, not just the quantity of attractions • Need to recognise and address key trends such as role of online reservations, staff upskilling, dominance in tourism of small and medium size businesses • Interpretation and way-finding information is patchy and marketing activity fragmented • Limited commercial leisure, entertainment and cultural offer • Current tourism sector heavily depends on day visitors, whereas overnight visitors generate much higher proportional spend • Numerically small current tourism offer in terms of jobs, visitor numbers and total spend • Lack of co-ordination between largest attraction (East Lancashire Railway) and Rawtenstall town centre results in lost opportunities • Lack of cohesive identity and branding for Rossendale.	• Limited public sector funds to pump prime attractions and deliver new infrastructure investment • Existing poor town centre offer in terms of retail offer and built environment condition • Current limited nature of accommodation provision • Existing limited public transport offer (bus only) and transport infrastructure is biased towards west of Borough, though many attractions are in the east • Lack of locally collated data regarding value and volume of tourism sector • Limited population size militates against new large-scale commercial leisure investment. Market captured by surrounding larger towns • Existing infrastructure associated with some attractions (car parking, toilets, catering, overnight accommodation) • Lack of directional road signage is barrier to accessing Rossendale – particular concern because of dispersed nature of attractions • Small scale of the Borough, limited number of attractions and available resources, make it difficult to market at regional/national levels.	• Capitalise on sub-region's themes of Country Escapes and Living Legends because of adrenaline sports and heritage clusters • East Lancashire Railway to become commuter rail link to Manchester • Natural assets provide platform for growth associated with natural tourism market • Expand visitor accommodation by addressing supply gaps of hotels, youth hostels, bunkhouses, caravan and camping sites • Collaborative marketing between different types of operators/providers • Further develop Food and Drink offer linked to Taste Lancashire/Taste International brands • Tourism is not constrained geographically within the Borough. It is a borough-wide resource and opportunity • Emerging development proposals from both the public and private sector • Improve public transport connections with Todmorden and Rochdale to capitalise on rail services • Improve directional road signage.

Source: BE Group 2010

Future Tourism Offer

xxiv. The high quality rural landscape has enabled Rossendale to take a regionally significant role in a range of outdoor sporting activities. This could underpin further growth, capitalising on trends in tourism towards short leisure and activity breaks as well as natural tourism. There is need to support this with infrastructure investment that would capture more visitor spend associated with accommodation provision.

xxv. Potential growth sectors are natural tourism; accommodation providers; local food and drink, and thematic business clusters that target specific visitor interests or types of visitor. There needs to be pro-active marketing to attract and secure developers/investors in hotel, caravan and camping site, and youth hostel accommodation. This has implications for local planning policy.

xxvi. Emerging developments have been identified that will strengthen the visitor offer and accommodation infrastructure. These include public sector investments improving and expanding footpaths, cycleways and bridleways; creating new festivals and marketing activities linked to Rossendale's attractions. Private sector proposals look to address gaps and under provision in support accommodation (hotel, self-catering, camping). The Adrenaline Gateway has the most significant expansion plan, including the option of an indoor extreme sports venue that would be a unique facility in the North of England.

xxvii. Other future infrastructure-related improvements required concern public transport, visitor interpretation, information and facilities, and labour market upskilling. The proposals for the East Lancashire Railway to become a commuter rail link to Manchester represent a medium to long term opportunity for a step change in public transport provision. Short term options are to improve links with the rail stations at Rochdale and Todmorden, to help capitalise on the acknowledged visitors' catchment area of Yorkshire, and to connect more easily with the part of Rossendale where most outdoor activity is concentrated.

xxviii. Potential scenarios for future Volume and Value are addressed in the separate Economic Analysis report. It is not possible to forecast beyond 2016, as little data is readily available to enable this. In addition to trends associated with the annual STEAM data produced for Rossendale on behalf of Lancashire and Blackpool Tourist Board, the following scenarios have been considered, where appropriate:

- Application of the current L&BTB Destination Management Plan's 40 percent growth target for visitor related jobs, for the period 2005 to 2016

- Application of the current L&BTB Destination Management Plan's annual performance targets year on year percentage change. These relate to the period 2008 to 2013, but have been projected on to 2016
- Application of the GDP growth projections included as forecasts (2008 to 2020) in the Borough Council's emerging Employment Land Review – but only to 2016
- Application of the NOMIS ABI statistical trend from the period 2002 to 2008, projected forward to 2016.

xxix. The scenarios reveal:

- A wide-ranging spectrum of possible employment levels for 2016. Using the STEAM baseline of 1098 jobs (2008), the scenarios create a range of 1161 to 1620 jobs by 2016. Application of Annual Business Inquiry data for 2008, and its significantly higher baseline of 1527 jobs, generates forecasts of between 1613 and 2497 jobs by 2016
- Projections for visitor numbers by 2016 suggest a low of 2.56 million and an upper figure of 3.15 million. These represent increases of between 16.5 and 45 percent over the 2008 figure
- Visitor spend level in line with the sub-regional growth and performance targets would result in a figure of between £78.95 and £82.8 million per annum. This equates to at least 380,000 (and potentially half a million) additional visitors based on the current £31 spend per trip. More dramatic levels would be achieved should visitor spend per capita population rise to match either the regional or sub-regional averages. This could see a spend total of £153-£174 million.

Recommendations

LDF Planning Policy – Proposed Amendments

xxx. The following changes are recommended for the Core Strategy:

- Section 1 Consultation – to add weight to the economic role of tourism, include consultation with key agencies
- Section 2 Context and Background – 1) update the commentary on leisure needs to reflect the Borough Council's decision on future leisure provision (or at least delete the reference to 2009). 2) Add to Key Issues the issue of attracting staying visitors, and thus the need for additional serviced and non-

serviced accommodation

- Section 3 Spatial Vision and Strategic Objectives – make reference to promoting other opportunities beyond the Adrenaline Gateway, to appeal to a wider spectrum of visitors, including outdoor (walking, cycling, riding); cultural (theatres); improving quality and mix (retail); addressing infrastructure needs (accommodation, hospitality transport) and softer issues (training, upskilling, marketing)
- Section 4 Area Visions and Policies – increase reference to the East Lancashire Regional Park beyond just Policy AVP2
- Section 5 Topic Planning Policies – 1) RLDF7 should refer to the potential to retain community facilities by combining them (for example pubs and post offices). 2) Consider links between Policies RLD7, 9 and 14 for recreational cycling (development of off road and road facilities) and the use of cycles as a transport mode.

xxxi. Suggested changes for the two key Tourism Policies RLDF14 and 15 are as follows:

RLDF 14: Tourism

- The policy should emphasise the importance of tourism to Rossendale and indicate that development in this sector will be encouraged throughout the Borough (rather than specifically emphasising the east of the Borough)
- It may be helpful to make reference to linking with other policies –for example RLDF9 (reference to improved accessibility to Rossendale Way, Irwell Sculpture Trail)
- Include reference to events promotion linked with the development of Active Sport
- Include reference to RLDF15 in terms of the development of complementary accommodation and hospitality facilities
- The policy should emphasise the strong cultural offer and acknowledge that proposals for the enhancement of existing facilities and activities (and supporting infrastructure such as car parking, bike racks, public realm etc) and the development of new facilities and activities will be considered favourably, where appropriate
- Mention should be made to access to tourism specific training and that this will, through cross-sector partnership, be actively supported. This links with Policy RLDF 6).

RLDF 15: Overnight Visitor Accommodation

- The policy should not be specific to 'small scale' visitor accommodation; rather it should refer to the development of both serviced and non-serviced accommodation. It would be advantageous to include reference to accommodation of quality
- Nor should the policy seek to restrict large hotels to just the centres of Rawtenstall or Bacup. The Borough currently lacks modern hotels and it needs to encourage their provision. There needs to be a recognition that the market demand may be for site locations elsewhere outside these two towns. It may therefore be better to have a policy that states that plans for hotels, bed & breakfast establishments, camping and caravanning sites and camping barns will be encouraged most particularly where they complement existing tourism facilities in the Borough.

Future Structure of Tourism in Rossendale

- Building on the appointment of a Tourism Officer, Rossendale Borough Council should to establish a Tourism/Visitor Economy Forum. This is to comprise representatives from both the public and private sector – for example Rossendale Partnership; Lancashire & Blackpool Tourist Board; Lancashire County Developments Ltd; Regenerate Pennine Lancashire; representatives from the attractions, retailers, events, accommodation, food and beverage sector
- The Tourism/Visitor Economy Forum should establish Terms of Reference that reflect the roles of representing Rossendale's tourism sector; co-ordinating activity such as events; being a conduit to further engage, consult and develop the tourism product
- Rossendale Borough Council to examine how it might improve the provision of appropriate responsibilities, staffing and their location, for tourism related activity.

Product Development

- The Borough Council should seek to achieve tourism product development initially linked to the themes of outdoors/active recreation; heritage (transport – East Lancashire Railway; buildings and attractions (Helmshore Textile Museum; Bacup and Rawtenstall town centres); film/TV location; specialist retail (for example Fitzpatrick's Temperance Bar; The Fudge Shop; Sunday

Best; Ride-On); creative industries (Art Academy Bacup; art in the landscape trails); food and beverage (Taste Lancashire/Taste International accreditations)

- Tourism sector partners should refine and develop the events calendar within the Borough to deliver a year round programme.

Accommodation Infrastructure

- The Borough Council should produce a marketing brochure targeted at hotel developers/operators, which details background to the area; population/visitor numbers; transport communications; assets, together with identified potential development sites (including availability, ownership details, services, planning context details). The Borough Council then to use this in proactive marketing to the sector
- The Borough Council should produce a similar brochure targeting unserviced accommodation providers – for example the YHA; The Caravan Club; The Caravanning and Camping Club.

Transport Infrastructure

- Continue to commit resources to secure improvements to the facilities at Rawtenstall station, addressing as a minimum physical and public transport linkages between the station and Rawtenstall town centre. This is to encourage more users of the railway to consider Rawtenstall as a viable option as part of the day out
- Deliver better joint marketing with East Lancashire Railway, and the provision of a tourist information point at Rawtenstall station
- Make a concerted effort to demonstrate the railway's value to Rawtenstall town centre businesses (as Ramsbottom has successfully done) of being open to coincide with the railway's peak business times – Saturdays and Sundays
- Rossendale Borough Transport to be invited to participate in the joint marketing approach – for example to widen out the current joint rail-bus ticket to Rossendale based attractions other than just Rawtenstall town centre
- Rossendale Borough Council to actively work with the East Lancashire Railway, Bury and Rochdale Councils and the Greater Manchester Integrated Transport Authority, to pursue the possible delivery of a commuter rail link connecting with Manchester Victoria. Lobbying should be allied to the GMITA

connection and 'Congestion Charge Plan B' monies, rather than via Lancashire, as the latter has other rail route improvement priorities to promote

- Rossendale Borough Council to explore with the South Pennine Rail Partnership, West Yorkshire Passenger Transport Executive and Rossendale Borough Transport how joint rail-bus services and ticketing might be promoted using Todmorden as a rail gateway to serve the eastern part of the Borough
- Rossendale Borough Council to engage with the Greater Manchester Integrated Transport Authority and Rossendale Borough Transport to promote joint rail-bus services and ticketing using Rochdale as a rail gateway to serve the east and south of the Borough.

Branding

- A branding or place consultancy to be commissioned to develop an appropriate brand. This should include evaluation of the current options as part of the commission
- Following selection of the preferred brand, gateways, signage and marketing literature (hard and electronic) should re-enforce the message.

Marketing

- The Visitor Economy/Tourism Forum, once established, should prepare and co-ordinate a Marketing Strategy that would therefore have input and buy-in from both the public and private sectors.

Creative Industries

- Examine the feasibility of establishing craft/design workspace in conjunction with exhibition and retail facilities, to create a new visitor attraction
- Undertake a review of undeveloped or dilapidated sites and buildings to determine priorities for a programme of temporary visual improvements at key locations that extends the current art in the rural landscape into art in the urban landscape.

Training

- The Borough Council to research Further or Higher Education providers in Lancashire and Greater Manchester with a view to linking with one provider who will establish/develop a Rossendale orientated course, such as Welcome

Host, that is customer focused and delivers skills development required for ‘front facing’ staff

- The Borough Council to explore the opportunity to develop apprenticeships as part of the skills training programme to be established.

Research and Marketing

- The Visitor Economy/Tourism Forum should introduce and co-ordinate a regular, ongoing research programme to gather data on the structure and spend associated with the tourism sector in Rossendale.

Action Plan

xxxii. An Action Plan has been produced which defines the key actions and associated activities to be progressed. This also identifies lead and supporting partners for each action, as well as indicative timescales and priorities.

1.0 INTRODUCTION

1.1 BE Group has been commissioned by Rossendale Borough Council (the Borough Council) and Lancashire County Developments Limited to assess the existing and potential contribution of tourism to the Rossendale economy, and the consequent spatial policy implications.

1.2 The assessment has been commissioned to provide robust evidence to underpin and inform the Local Development Framework (LDF), the new style review of the Development Plan. This is one of the key pieces of evidence for the preparation of the LDF and more specifically the Core Strategy.

Objectives

1.3 There are a number of elements to the study:

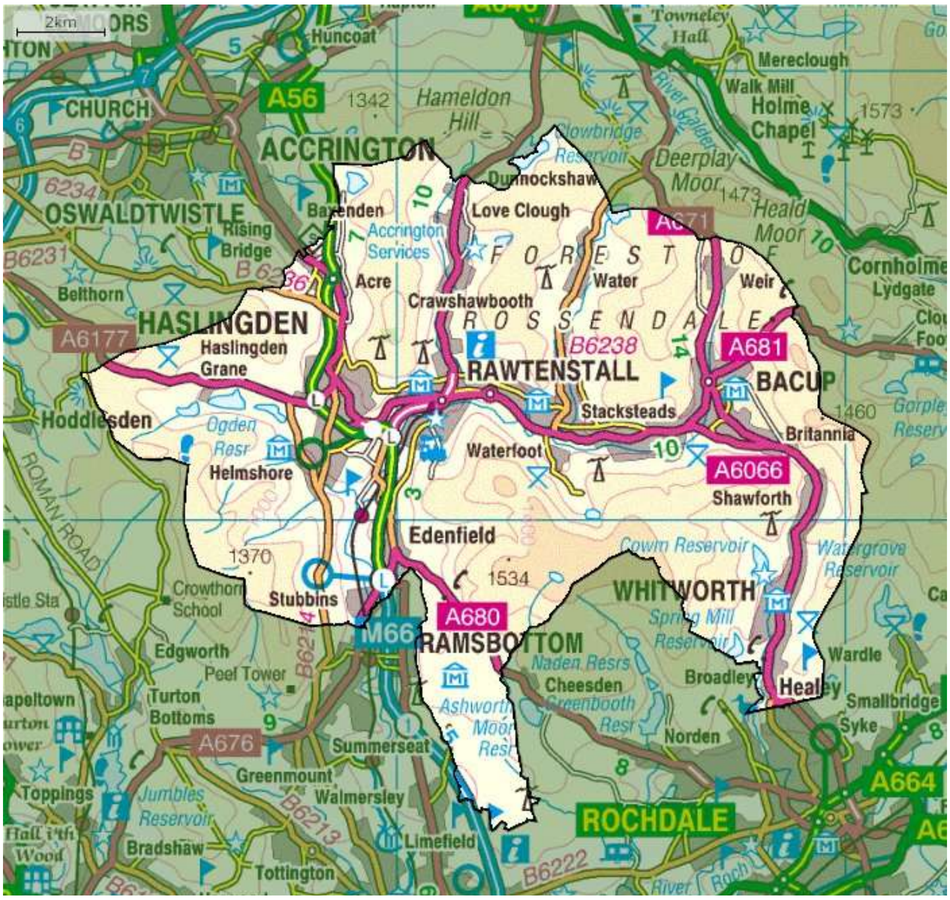
- Review of the current range of visitor attractions and events in Rossendale, along with relevant supporting infrastructure
- Overview of the tourism market, estimating the current and future economic benefits of visitor attractions and supporting infrastructure
- Assessment of the strengths, opportunities and constraints of the current and future tourism offer in Rossendale
- Identification of potential growth sectors, the main supporting infrastructure required by those sectors, and the likely economic benefits of growth
- Recommendations setting out the implications for local policy and the actions required by public and private sector partners.

Study Area

1.4 Rossendale is one of the six districts of Pennine Lancashire, bordering both Greater Manchester (Rochdale and Bury) and West Yorkshire (Calderdale). The main towns are: Rawtenstall, Bacup, and Haslingden. Smaller settlements include Helmshore, Edenfield, Crawshawbooth, Whitworth, Waterfoot and Stacksteads.

1.5 The Borough (Figure 1) is largely rural and has a population of 67,300 people (mid-year estimate 2008) – the majority of which live in the main settlements. Historically the area has had a strong element of manufacturing, mainly family owned firms in footwear and textiles. Despite a dramatic decline in these industries at both national and local level, the area still retains higher than average levels of manufacturing. According to ONS statistics tourism employed 1500 people in 2008 (7.2 percent of all jobs), and the Borough benefits from both a rich industrial heritage and an environment which includes attractive features such as the Irwell River Valley and West Pennine Moors.

Figure 1 – Rossendale



OS Licence: 100007459, 2010

Source: ONS 2010

Methodology

1.6 The client study Steering Group and BE Group have jointly compiled a schedule of all known visitor attractions, events and supporting infrastructure relating to the tourism sector. The schedule has been drawn up from a combination of desktop research and personal knowledge. The organisations and individuals identified have received a questionnaire survey, primarily through use of emails but for some through a postal questionnaire. In all 106 visitor attractions, event managers and associated businesses have been surveyed.

1.7 This was followed by a workshop, to which all 106 tourist businesses, along with 22 relevant public sector officers were invited. Undertaken on 19th April 2010, at Futures Park, Bacup, participants were asked to discuss both the present strengths and weaknesses of tourism in Rossendale, and the future opportunities and threats.

1.8 Further consultation (by phone or face-to-face interview) has taken place with the public sector agencies that have responsibility for tourism at local, county and regional levels. Desktop analysis of existing reports and documents has also been filtered into the overall findings to set a context for the study and appraise existing research. Context research has focused on the Core Strategy and the national, sub-regional and local factors that influence this strategy.

Note

1.9 At the time of this study, the UK remains in recession. Latest data suggests that economic recovery may have begun but it is expected that this could take until at least late 2011 to return the UK to its healthy state. As such, businesses have reduced confidence and are reining in investment. While the effects of this recession cannot be ignored in the short term, and are recognised in the report, this tourism study is for the period to 2027. Consequently, while economic growth and property/business investment are currently constrained, they should in due course, revert to longer-term norms.

2.0 STRATEGIC CONTEXT

2.1 This section focuses on national, regional and local strategies and policies that have relevance to, or direct impact upon, tourism in Rossendale. An understanding of the strategies and policies contained in this section is needed to show strategic alignment and a holistic approach to promoting sustainable development in tourism. BE Group's recommendations will follow the general principles set by them.

2.2 It is also important to note that while there are a number of regional documents that discuss tourism, many of these were produced before 2006 and have not been updated.

National

Planning Policy Statements/Guidance Notes

2.3 In respect of tourism, national planning policy guidance points to five key areas, which will be considered and inform the conclusions and recommendations in this report:

- PPS1: Delivering Sustainable Development (2005)
- PPS4: Planning for Sustainable Economic Growth (2009)
- PPS7: Sustainable Development in Rural Areas (2004)
- PPG13: Transport (2001)
- DCLG Good Practice Guide on Planning for Tourism (2006)
- DCLG Planning for Town Centres: Practice Guidance on Need, Impact and the Sequential Approach (2009).

2.4 These guidance notes and statements are intended to assist local authority policy makers.

PPS1 (2005)

2.5 PPS1 sets out national planning policies on the delivery of sustainable development in the planning system. Goals include:

- *"Social cohesion and inclusion*
- *Protection and enhancement of the environment*
- *Prudent use of natural resources*
- *Sustainable economic development*

- *Integrating sustainable development in development plans."*

2.6 Policy should ensure that suitable development locations are available for industrial, commercial, retail, public sector, tourism and leisure developments, to ensure their economic viability and maximise their accessibility. Developments that attract a large number of people, especially retail and leisure developments should be focused in existing centres to promote the vitality and viability of those centres.

PPS4 (2009)

2.7 PPS4 marks a new approach to national planning policy in that it takes a whole-economy approach, covering all economic land uses including tourism. The central theme of PPS4 is that central Government wants planning to positively support sustainable economic growth.

2.8 PPS4 states that arts, culture and tourism development are included in the main uses to which its town centre policies apply.

2.9 Policy EC7 addresses planning for tourism in rural areas. It states local planning authorities should support rural tourism and leisure developments that benefit rural businesses, communities and visitors, and which utilise and enrich (rather than harm) the character of the countryside, towns, villages and other features.

2.10 Through the LDF process, local planning authorities should support the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres. This has to be balanced with the need to protect landscapes and environmentally sensitive sites.

2.11 Wherever possible facilities requiring new buildings in the countryside should be provided in, or close to, service centres or villages. They may be justified in other locations where the required facilities need to be in conjunction with a particular countryside attraction.

2.12 Policy EC7 sees the LDF process supporting extensions to existing tourist accommodation, if the scale of extension is appropriate to the location and may help to ensure the viability of such businesses. The LDF should also recognise that in areas designated for their natural or cultural heritage there will be scope for tourism and leisure related developments, but there needs to be appropriate control over the number, form and location.

PPS7 (2004)

2.13 PPS7 sets out national planning policies for rural areas. It recognises that tourism and leisure are vital to many rural economies and that policy should therefore:

- Support tourism and leisure developments that benefit rural businesses, communities and visitors and which enrich the countryside
- Recognise that in protected areas (e.g. National Parks), there will be scope for tourist and leisure related developments, subject to appropriate control over their number, scale and location
- Ensure that the advantages and disadvantages of any proposals for large-scale tourism and leisure developments have been assessed against sustainable development objectives.

2.14 Policy should plan to address gaps in the provision of general tourist and visitor facilities. Where new or additional facilities are required, these should normally be provided in, or close to, service centres. Facilities needed to enhance visitors' enjoyment, or improve the financial viability of a particular countryside attraction should also be permitted providing they do not detract from that feature, or the surrounding countryside.

2.15 Most tourist accommodation should be provided in or adjacent to, existing towns and villages. The conversion of existing buildings to provide accommodation, or proposed extensions to existing accommodation, should be encouraged where the scale and location is appropriate.

2.16 When caravan or holiday chalet developments are proposed for rural areas, policy should:

- Protect landscapes and environmentally sensitive sites
- Set out policies for the provision of new caravan sites and chalet developments, and the expansion and improvement of existing sites
- Ensure that new or expanded sites are not prominent in the landscape and that any impact is minimised by screening.

PPG13 (2001)

2.17 PPG13 aims to ensure that jobs, shopping, leisure facilities and services are accessible by public transport, walking, and cycling. This particularly applies to leisure or tourism developments that attract large numbers of visitors. Existing town or local service centres should be the preferred locations for such developments. When visitor facilities are proposed in areas not well served by public transport, the local planning authority should consider:

- The extent to which the proposal needs to be in the proposed location
- The scale, layout, parking and access arrangements
- How to increase access by sustainable transport modes, and consider the use of appropriate traffic management and parking policies around the site.

DCLG Good Practice Guide on Planning for Tourism (2006)

2.18 The DCLG Good Practice Guide incorporates the definition of tourism as set out by the World Tourism Organisation (WTO). The WTO considers that 'tourism' refers to all activities of visitors including both "*tourist (overnight visitors)*" and "*same-day visitors*".

2.19 At the same time, this guide recognises that tourism is extremely diverse. Tourism can include travel and visits for business, professional and domestic purposes as well as for holidays and recreation, but sometimes more than one purpose is involved. For example, business conferences and sales events, music festivals, professional and academic meetings, can combine an element of tourism with other purposes. Tourism includes not only the annual family holiday but also shorter visits, weekend breaks and day trips. Planners should therefore recognise this diversity when preparing development plans and taking planning decisions.

DCLG Planning for Town Centres (2009)

2.20 The DCLG Planning for Town Centres guide highlights the policy requirement to focus 'main town centre uses' (including leisure and tourism) into existing centres. However, the guidance warns against using sequential testing without understanding the wider implications of a proposal. If an application is to be refused on sequential grounds, there must be a reasonable prospect of a more centrally located alternative coming forward. Sequential testing should also consider the individual needs of different uses. For example, a hotel may be better located on a main road junction, than in a town centre.

2.21 Proposals which are not in accordance with an up to date development plan will require an impact assessment. 'Impact' means a proposal's effects on development strategy, new investment and the vitality and viability of town centres. Assessment is particularly relevant to larger retail and leisure/entertainment proposals. The testing of other main town centre uses will vary according to circumstances.

2.22 The need for different town centre uses should be proactively identified by the local authority as part of evidence based development. Although need assessment will focus on retail requirements, other uses (e.g. new hotels) will also impact on the level of available spending and should be considered. Needs assessment should review the capacity of existing settlements to support new development, but should also identify if alternative centres or sites might be more suitable for development opportunities.

Regional

Regional Strategy for England's North West, 2010: Part 1 – The High Level Strategic Framework – 4NW (2010)

2.23 This new strategy proposes a number of high-level strategic priorities for the North West. One of these, 'Building on sources of international competitive advantage', includes developing a world-class sporting, culture and quality of place offer which will make the region more attractive to visitors. This requires amongst other things:

- *"Developing the sports offer*
- *Developing the cultural offer, e.g. historic environments, arts, museums, industrial heritage*
- *Safeguarding and improving natural and physical environments*
- *Ensuring the attraction of high-profile international events*
- *Improving the quality and distinctiveness of visitor destinations and experiences, including 'business' tourism."*

2.24 Part 2 of the Strategy was to set out detailed policies and actions. However, following the General Election the new Secretary of State for Communities and Local Government has announced the commitment to rapidly abolish Regional Strategies and return decision making powers on planning to local councils. Regional Strategies have now been revoked and the Government intends formal abolition to be enacted soon.

The North West Regional Spatial Strategy to 2021 – NWRA (2008)

2.25 As stated above the Regional Spatial Strategy (RSS) no longer forms part of the Development Plan. RSS did provide a planning framework for development and investment in the North West. It divided the region into five Priority Areas, one of which being the Central Lancashire City Region. This includes Rossendale.

2.26 The vision for the Central Lancashire City Region was set as "*a globally competitive City Region offering a distinctive and diverse environment for prosperity*" where:

- *"Urban regeneration and growth is matched by increased prosperity in smaller towns, villages and rural communities*
- *Economic growth is matched by continual improvement to quality of life and well being*
- *The mix of townscapes and landscapes will continue to flourish*
- *A strong, vibrant town and city centre promotes social inclusion and sustainable growth."*

2.27 The RSS noted that the "*North West must improve the overall quality of its tourism offer not just the quantity of attractions. The impacts of tourism on the environment, transport infrastructure and access to local facilities, must be managed successfully if the region is to benefit."*

North West Regional Economic Strategy – NWDA (2006)

2.28 The aim of the Regional Economic Strategy (RES) is to improve economic performance and enhance the region's competitiveness.

2.29 The RES and RSS provide the context for economic and spatial development in the region. While the RSS focuses on spatial and land-use related issues, the RES provides the policy context for economic issues as they relate to development and regeneration.

2.30 The vision of the RES is to create a "*dynamic*, *sustainable international economy which competes on the basis of knowledge, advanced technology and an excellent quality of life for all where*:

- *Productivity and enterprise levels are high, in a low carbon economy, driven by innovation, leadership excellence and high skills*

- *Key growth assets are fully utilised (priority sectors, the higher education and science base, ports/airports, strategic regional sites, the natural environment and the rural economy)*
- *The economies of East Lancashire, Blackpool, Barrow and West Cumbria are regenerated*
- *Employment rates are high and concentrations of low employment are eliminated*."

2.31 The RES also considers five themes:

- *"Business*
- *Skills and Education*
- *People and Work*
- *Infrastructure*
- *Quality of Life."*

2.32 In order to achieve the Vision, a number of key actions have been highlighted for each of the themes. Those related to tourism are:

- *"Improve the product associated with tourism 'attack brands' and 'signature projects'*
- *Develop the economic benefit of the region's natural environment*
- *Invest in public realm, greenspace, and environmental quality*
- *Implement a Business Tourism Strategy for the region*
- *Develop and implement a Visitor Information Strategy for the region*
- *Support business development for tourism businesses*
- *Deliver sustainable growth through use of the region's heritage environments and assets."*

2.33 The most relevant actions include the need to promote the image of the region, maximise cultural and major event opportunities and develop the quality of the visitor experience.

The Strategy for Tourism in England's North West, 2003-2010 – NWDA (2007)

2.34 This strategy is designed to "*strengthen the region's focus on offering the best visitor destinations; emphasise the growing importance of tourism being linked to local authorities in place-shaping; ensure work is aligned with the new national thinking on* *tourism; and to give centre stage to the principles of sustainable development in tourism.*"

2.35 The aims are:

- *"To offer the best quality experience to visitors*
- *Providing the highest quality service – doing that little bit more*
- *Having excellent prize-winning hotels and other places for visitors to stay*
- *Providing wonderful food and drink using as much local produce as possible*
- *Having a public realm characterised by high quality design that in places is exceptional*
- *Having a region wide programme of events and festivals – celebrating historical, cultural and environmental diversity*
- *Having a productive and highly talented workforce*
- *Demonstrating care for the environment and visitors*
- *Being proud of our region and enjoying living here*
- *Generating economic and social benefits for our communities."*

Sub Regional

Lancashire and Blackpool Visitor Economy Strategy 2006-2016 – Lancashire and Blackpool Tourist Board (2006)

2.36 The strategy was developed to improve partnership working when planning, developing, promoting and managing the visitor economy. It has been developed to add value to the RES and RSS.

2.37 The strategy supports inter alia, the development of the Central Lancashire City Region as a visitor destination – the visitor economy can help bring more people into employment, help create truly sustainable communities, and is central to marketing the North West to the world.

2.38 The vision is for the Lancashire and Blackpool visitor economy to realise its potential by:

- *"Building and sustaining confident, committed and prosperous businesses*
- *Investing in quality in every aspect*
- *Improving the image and raising the profile of the area*

- *Ensuring that people benefit and appreciate the contribution tourism makes to the region."*

2.39 The vision includes (by 2016) that:

- *"Lancashire will be established as a destination with well kept heritage towns, classic resorts and a beautiful countryside*
- *Lancashire's countryside will have developed its potential through sensitive and sustainable development*
- *The visitor economy will be making a significant contribution to the sub-regional economy, the environment and the image of Lancashire and Blackpool."*

2.40 Blackpool, Preston, Lancaster and the Lancashire coast are the focus of the strategy, but two 'winning' themes are identified for Rural Lancashire – Country Escapes and Living Legends. 'Country Escapes' refers to rural activities (e.g. walking) while 'Living Legends' are key cultural and historic attractions.

2.41 The Country Escapes theme priority actions are:

- *"To develop thematic business clusters for cycling, walking and watching wildlife*
- *To develop networks of wildlife attractions*
- *To develop adrenaline sports in the West Pennines*
- *To grow the potential of events – especially existing ones with a strong and locally diverse theme*
- *To further develop the quality of the accommodation and food offer*."

2.42 The Living Legends theme looks at strengthening the quality of Lancashire's many cultural 'gems'. The priority actions are:

- *"To introduce a 'polishing gems' programme to improve the setting, facilities and marketing of museums and heritage sites*
- *To create a heritage cluster for development and marketing activities*
- *To celebrate industrial heritage though investment in buildings, public realm and through marketing activity*
- *To strengthen and co-ordinate existing events."*

Lancashire & Blackpool Destination Management Plan 2009-2010 – Lancashire and Blackpool Tourist Board (2009)

2.43 The Management Plan sets out at a strategic level the aspirations and key actions of stakeholders with a responsibility or interest in the visitor economy. It notes that in 2007 the visitor economy spend represented 21 percent of the regional total, supporting 25 percent of all jobs.

2.44 The plan was prepared in the context of an economic downturn, which has raised a number of short-term challenges for tourism businesses. These include resource limitations that will affect potential progress. However, there may be a positive impact on the domestic tourism market. Research by Visit Britain suggests 1 in 5 people who holidayed overseas in 2008 would be willing to switch to the UK to save money.

2.45 The vision for the sub-region's visitor economy includes, by 2016:

- *"Lancashire will be established as a destination for mature and discerning visitors attracted by the traditional Lancashire welcome based on a high quality, friendly and personal service. These visitors will come throughout the year*
- *The main appeal of Lancashire will be its well-kept heritage towns … and beautiful countryside, whose attractions are presented with flair and imagination that reinforces a strong sense of place and local identity*
- *Lancashire's countryside – one of the area's strongest assets – will have developed its potential through sensitive and sustainable development*."

2.46 In order to achieve the vision, local authorities will value the importance of the visitor economy. This will be reflected in their approach to the development and management of the public realm, as well as the heritage and natural assets in their care. Also, the tourist industry will invest in their products and people, to ensure the quality of the visitor experience exceeds expectations. The expectation is they will work together to share best practice and add value to individual achievements.

2.47 The Plan defines a number of targets for growth between 2005 and 2016:

- Visitor spend to increase by 22 percent
- Visitor numbers to rise by 41 percent
- Bed occupancy level to increase from 35.4 to 46 percent

- Visitor related jobs to rise by 40 percent.

2.48 Reference is made to major tourism investment projects and initiatives expected to impact in the short term (i.e. 1-3 years). Two have direct relevance to Rossendale. The Adrenaline Gateway is detailed as a £13 million investment project, generating 432 jobs, creating a nationally recognised sport/leisure network using a hub and spoke approach to provide a new economic platform for tourism and leisure. The East Lancashire Regional Park (including Rossendale) will develop a network of recreational and commuter cycleways, alongside the provision of the Panopticons' landmarks and development of the Pennine Bridleway and footpath network.

2.49 The priorities for action are set out as:

- *"To build a confident and skilled workforce*
- *To develop a high quality visitor experience*
- *To create a truly sustainable destination*
- *To adopt a market-led approach."*

2.50 As mentioned above growth targets are set for the period 2005 and 2016. However the performance indicators stated in the Plan reflect the period 2008-2013 and are based against actual figures for 2007 (Table 1). The negative figures indicated for 2009 reflect the expected impact of the recession.

Table 1 – Lancashire & Blackpool Visitor Economy Performance Targets

Performance Measure	Performance Year to Year (percentage change)						Target Performance 2013 %
	Actual 2007	2008 %	2009 %	2010 %	2011 %	2012 %	
Visitor Numbers (millions)	58.37	+1.4	-4.0	+1.7	+3.0	+3.0	+3.0
Visitor Spend (£billion)	2.91	+0.6	-3.8	+0.7	+1.4	+1.4	+1.7
Visitor Night Numbers (millions)	24.92	+1.5	-4.0	+1.0	+2.0	+2.0	+2.0
Day Visit Numbers (millions)	50.33	+2.0	-4.0	+1.0	+2.0	+2.0	+2.0
Average Annual Room Occupancy (percentage)	45.9	+5.9	-4.0	+0.5	+0.5	+0.5	+0.5
Average Bed Occupancy Level (percentage)	34.6	+4.6	-4.0	+0.5	+0.5	+0.5	+0.5
Visitor Related Jobs	54,161	+3.0	-4.0	+0.7	+1.5	+1.5	+1.5

Source: L&BTB 2009

2.51 Annexed to the Plan are individual local authority support activity proposals. These incorporate both continuing provision and forward programme activity. For Rossendale, the latter refers to half yearly 'How's Business' surveys; developing the Tourism Working Group with the activation of cluster specific sub groups and individual thematic champions; continuing feasibility work regarding the Adrenaline Gateway; the development of additional cluster brands as well as Area Action Plans for Rawtenstall and Bacup town centres.

Lancashire Economic Strategy and Sub Regional Action Plan 2006-2009 – Lancashire Economic Partnership (2006)

2.52 The purpose of this strategy is to provide a co-ordinated approach to the development of the sub-regional economy. The action plan covers the period 2006-2009 but sustainable economic regeneration of Lancashire will be delivered over a much longer timescale.

2.53 The strategy sets out six strategic headline economic priorities for the sub-region, with three spatial and three thematic. Of relevance to Rossendale's tourism are:

- *"Pennine Lancashire Transformational Agenda*
- *Skills*
- *Tourism and Rural Development."*

2.54 The strategy highlights RES programme linkages to the Lancashire Sub-regional Action Plan. Those relevant to tourism are:

- *"Developing growth and innovation in the tourism sector through the continued implementation of the Strategy for Tourism in England's North West 2003-2010 (NWDA, 2007) – tourism, image and culture are key drivers of the Lancashire Action Plan and specific projects are evidence of Lancashire's commitment to growing and developing the tourism sector*
- *Developing skills and procurement initiatives, connect jobs with people, and influence government policy to support a number of sectors, including the visitor economy and retail*
- *Implement a Business Tourism Strategy, to develop the quality and range of facilities within the region – the action plan supports Lancashire and Blackpool Tourist Board in marketing the region and sub-region to the visitor economy*
- *Develop and implement a Visitor Information Strategy for the region*

- *Support business development for tourism businesses through the region's five Tourist Boards to grow the market share of domestic, overseas and business visitors."*

Local Core Strategy DPD: The Proposed Way Forward – Rossendale Borough Council (2009) (Reg. 25 Stage)

2.55 Analysis of the responses received from public consultations for the Proposed Way Forward has highlighted a number of major concerns that impact on the tourism sector:

- *"Capitalising on tourism assets*
- *Revitalisation of town centres*
- *Infrastructure capacity*
- *Reuse of derelict buildings and brownfield areas."*

2.56 Respondents felt that countryside and landscape protection and development should be a higher priority. New Policy RLDF1: General Development Locations has addressed this. They also noted that more guidance on acceptable tourism, leisure and recreation development in these areas is needed. The following Policies now address this:

- RLDF 17: Protecting and Utilising Rossendale's Natural Environment
- RLDF 14: Tourism
- RLDF 15: Overnight Visitor Accommodation.

2.57 A number of stakeholder consultations have highlighted the key aspirations of Rossendale Borough Council's Partners.

2.58 Tourism development depends on adequate infrastructure provision. It is therefore relevant to note reference is made to utilities services and how growth in demand will be accommodated. United Utilities, who deliver water supply and treatment across Rossendale, have responsibility with the Environment Agency for flood and pollution prevention. Their forward plan will address surface water run-off issues through new storage facilities in Stacksteads and Rawtenstall.

2.59 United Utilities are also responsible for, along with National Grid, the supply of electricity. There have been discussions to ensure sufficient supply for proposed growth.

2.60 One of the key issues highlighted and in need of addressing is "*How to enhance the tourist potential of Rossendale*."

2.61 The Core Strategy spatial vision describes various aspects of Rossendale. With regards to tourism, it states "*the east of Rossendale including, Bacup, Stacksteads, Britannia and Whitworth will continue to develop as tourist destinations for sport and recreational activities as well as an area of historical and architectural interest*."

2.62 Strategic Objective 7 describes Rossendale's natural environment and landscapes and their potential in supporting tourism, recreation and leisure provision. Schemes and objectives supporting the 'Adrenaline Gateway' project are actively encouraged, especially where they will link into other forms of tourism and recreation attractions.

2.63 The strategy identifies six individual areas for which Area Visions have been prepared.

2.64 The Area Visions suggest how the areas will develop in the period to 2026, providing some degree of certainty for local people, developers, investors and RBC. They outline the strengths, weaknesses, opportunities and threats of each area, and propose a way forward to address the key issues. They act as a guide for future development in the area, although proposals and allocations will be determined in line with the other policies in the LDF Core Strategy and site allocations through the forthcoming Allocations DPD.

2.65 The six individual areas are:

- Whitworth, Facit and Shawforth
- Bacup, Stackstead, Britannia and Weir
- Waterfoot, Cowpe, Water and Lumb
- Rawtenstall, Crawshawbooth, Goodshaw and Loveclough
- Haslingden and Rising Bridge
- South West Rossendale: Helmshore, Edenfield, Stubbins, Irwell Vale, Lumb, and Ewood Bridge.

2.66 Table 2 provides a summary of context relevant to the tourism sector.

Table 2 – Core Strategy Area Visions

Area	Vision (in relation to tourism)	Strengths and Opportunities	Area Vision Strategy (AV Policies 1-6)
Whitworth, Facit and Shawforth	"*To promote Whitworth as a prime location of choice to live and work, capitalising on the area's assets and facilities, and ensuring that Whitworth's leisure and tourism potential is sensitively realised to support the tourism offer available in the east of Rossendale."*	• *Good access to the countryside* • *Cowm Reservoir which regularly hosts competitions for water related sports.*	• *Proposals supporting recreation pursuits will be encouraged, including access and improvements to the Pennine Bridleway, cycleways and other routes linking settlements to recreational activities* • *Proposals supporting the 'Adrenaline Gateway' will be encouraged* • *Cafes, parking and small scale overnight accommodation will be encouraged in appropriate locations* • *Landscape, heritage, ecological assets and the leisure offer will be conserved and enhanced through sensitive additional developments supporting tourism.*
Bacup, Stacksteads, Britannia and Weir	*"Bacup will be the hub of the Valley's emerging tourism industry, building on its rich built and natural heritage supported by complementary developments and opportunities within Stacksteads, Britannia and Weir"*	• *Good access to countryside with potential for tourism and outdoor leisure opportunities* • *Proximity to and attraction of the 'Adrenaline Gateway' project and Lee Quarry.*	• *Bacup's heritage will be strengthened and opportunities for tourism related employment encouraged* • *Access to countryside and local attractions will be enhanced and promoted* • *Proposals for tourism and leisure related developments will be considered favourably* • *Developers to ensure local residents benefit from any new schemes, for example providing training opportunities and jobs.*
Waterfoot, Cowpe, Lumb and Water	*"The area will support the wider tourism and leisure opportunities and facilities within Rossendale with appropriately*	• *Good access to the countryside* • *Local heritage icons, e.g. Victoria*	• *Provide additional leisure and recreation provision within the smaller settlements*

Area	Vision (in relation to tourism)	Strengths and Opportunities	Area Vision Strategy (AV Policies 1-6)
	located facilities and services, supported by improved access to the countryside"	*Arcade* • *Local cultural and community assets – Horse and Bamboo Theatre* • *Outdoor activities such as fishing and water sports at Clowbridge, Clough Bottom and Cowpe reservoirs.*	• *Within or adjoining the main urban area identify suitable sites for tourism development to support the 'Adrenaline Gateway'* • *Identify and promote sites which encourage access to the outdoors and leisure opportunities and provide ancillary visitor accommodation such as car parks, toilets and camping facilities* • *Improve access (including signage) to the countryside and local tourist and leisure attractions* • *Additional growth for the leisure and tourism sectors within the area will be targeted towards Marl Pits and where appropriate, some of the greenland areas.*
Rawtenstall, Crawshawbooth, Goodshaw and Loveclough	*"Rawtenstall will be a place that people will want to live, visit and shop. The Valley Centre and its surroundings will be a revitalised heart for the town complemented by high quality small shops on Bank Street and a thriving market. A new commuter rail link Manchester, attractive walking routes from the station to the town centre and a new bus facility will all contribute to better transport links."*	• *Maximising the role of the East Lancashire Railway as a tourist attraction* • *Improving and redeveloping leisure facilities – particularly at Ski Rossendale* • *Good access to the countryside, including the Irwell Sculpture and Shoe Trails.*	• *Valley Centre redevelopment to be encouraged as a mixed use project* • *Improve pedestrian links between Rawtenstall Station and the town centre* • *Rawtenstall bus station to be re-built, to provide high quality facilities* • *The diversity of small shops in Rawtenstall, including the market, to be retained and enhanced* • *New cycling/bridleway routes to be created, in particular along Limey Water.*
South West Rossendale	*"The area will support the wider tourism and leisure opportunities within Rossendale with appropriately located facilities and services. This will in turn be supported by improved access to the*	• *Picturesque environment and access to the countryside including the Irwell Sculpture Trail, Rossendale Way and other Countryside Rights of Ways*	• *Promotion of the areas outdoor recreation offer such as; Irwell Sculpture Trail; East Lancashire Railway; halt in Irwell Vale; River Irwell; Haslingden Grane and reservoirs; and*

Area	Vision (in relation to tourism)	Strengths and Opportunities	Area Vision Strategy (AV Policies 1-6)
	countryside, retention of existing Green Belt boundaries and the conservation of local heritage."	*(CROWs)* • *East Lancashire Railway halt in Irwell Vale* • *Distinct local heritage.*	*other countryside rights of way supported by appropriately located small scale accommodation, parking, local shops, cafes and other necessary facilities* • *The distinct local heritage will be preserved and enhanced especially in the conservation areas of Irwell Vale and Chatteron/Strongstry.*
Haslingden and Rising Bridge	"*Haslingden and Rising Bridge will be attractive places to live and work for all sections of the community. In the countryside improved access and management will help to contribute to residents enjoyment of the area. Haslingden Town Centre will be rejuvenated with reduced numbers of vacancies and a broad range of shops. Deardengate will be made more attractive for users including improved public space works."*	• *'Halo' Panopticon and increased tourism interest* • *Access to the countryside including the Shoe Trail and Kings Highway as well as Haslingden Grane* • *Abundance of local history and heritage including several Commemorative Blue Plaques.*	• *Tourism proposals (including accommodation) will be supported through measures such as improved signage and public access to attractions such as the 'Halo' Panopticon and Haslingden Grane.*

Source: Rossendale Borough Council 2009

2.67 The Topic Planning Policies mentioned below cover different types of development that will occur in Rossendale over the next 15 years and set out the Borough Council's approach to managing new development at the same time as protecting and enhancing natural and manmade assets.

2.68 These policies set out when and how different types of development will be encouraged and what standards are expected. They also set out how the natural environment and built heritage will be protected from development and enhanced through contributions and improvements.

Policy RLDF 9 – Accessibility

2.69 This policy proposes that *"the footpath, cycleway and bridleway network including the Rossendale Way and Irwell Sculpture Trail will be developed and enhanced in an integrated manner as part of Rossendale's 'Green Infrastructure' including improved signage."*

Policy RLDF 14 – Tourism

2.70 The policy states that tourism is to be promoted throughout Rossendale, through building on leisure pursuits and the unique sense of place within the Valley. It states that particular emphasis will be given to the east of the Borough. The active sports industry in particular is acknowledged as a key tourism opportunity for Rossendale and will be supported in the following ways:

- *"Ensuring through the Allocations Document that key sites are identified for tourism in general and specifically to support the 'Adrenaline Gateway'*
- *Facilitating the extension and upgrading of the public rights of way network including interpretation panels, public art and signage*
- *Taking a positive approach to development of complementary built facilities in the Bacup and Stacksteads area*
- *Facilitating the Regional Park for East Lancashire*
- *Proposals for the enhancement of other existing tourism attractions such as the ELR, Helmshore Mills, Cowm Reservoir, the Irwell Sculpture Trail, Valley of Stone, the Mary Towneley Loop, and the 'Halo' Panopticon which includes public realm improvements*
- *Improved accessibility by all means, with better linkages and increased parking will be favourably considered."*

2.71 The policy also states that planning proposals for the expansion and improvement of creative industries (including artist studios and theatres in Bacup and Waterfoot) will be given positive consideration.

2.72 The countryside is to be protected and enhanced for its own sake and for its tourism value, in particular within the designated West Pennine Moors area and the moorland of the South Pennines.

2.73 The Borough Council is committed to promoting the tourism opportunities available within the Borough and recognises the additional opportunities which will be available to local residents.

2.74 The policy makes reference to the 'Adrenaline Gateway' concept. The concept seeks to market and develop extreme and outdoor sports facilities in the Borough. Already, a mountain biking facility, at the disused Lee Quarry near Bacup, is attracting riders from across the north-west. An extension is proposed that will use rights of way and old tramways to Cragg Quarry, forming part of the 'Valley of Stone' proposal. An indoor facility and 'base camp' is also proposed near Bacup.

2.75 Rossendale has an existing network of creative art providers (theatres, artists and sculptors) that provide employment and attract visitors. The Borough Council is working with partners (including Lancashire County Developments Ltd) to take forward tourism schemes in particular active sports initiatives.

RLDF 15 – Overnight Visitor Accommodation

2.76 The Policy states that "*The Council will take a positive approach to new small scale visitor accommodation, particularly where this makes use of existing buildings. Proposals that seek to increase the supply of overnight accommodation and are appropriate for their locality should be encouraged, including bed and breakfast establishments, as well as camping and caravan parks, where there are no adverse impacts to the local road network infrastructure capacity or landscape."*

2.77 In support of RLDF15, the Reasoned Justification notes that *"joint work is being undertaken with adjoining Pennine Lancashire authorities under the Pennine Lancashire brand, which has identified Rossendale as having one of the lowest numbers of overnight accommodation stays."* It adds that if the tourism offer improves, the number of overnight stays is likely to increase. Opportunities including

B&B's/guest houses, bed and tack along the bridleways and camping and caravan sites will be encouraged.

RLDF17 – Protecting and Utilising Rossendale's Natural Environments

2.78 The Reasoned Justification notes that one of Rossendale's main selling points is the "*dramatic and attractive landscape and natural environment that envelopes the urban area."* This is one reason why many people decide to live, work and visit here. It is therefore important that the natural environment is protected from inappropriate and harmful development.

RLDF 20 – Supporting the Rural Economy and its Communities

2.79 RLDF 20 identifies the principles through which the rural environment and economy are to be protected and enhanced. Support will be given to the social and economic needs of rural communities. This will include encouraging appropriate tourism related initiatives, particularly schemes that improve the accessibility of tourist attractions both within and outside the Borough, particularly the 'Adrenaline Gateway'.

Rossendale District Local Plan Saved Policies – Rossendale Borough Council (2007)

2.80 This document lists Local Plan policies which have been saved beyond the standard three year period (2004-2007). These policies will be replaced overtime by the LDF.

2.81 Policy J5 encourages "*the improvement of existing tourist facilities and the development of new accommodation and attractions in appropriate locations*." It recognises that the Borough's tourism industry is currently underdeveloped and there are a limited number of existing attractions. Improving the visitor offer (without damaging the Borough's unique character) is therefore a priority, particularly the provision of additional visitor accommodation. The Borough Council will also work to preserve and enhance existing visitor attractions, notably the ELR.

2.82 Policy C10 indicates that "*The Council will protect, improve and extend the Valley Ways – Major linear routes along the main valley serving as a key open space linking towns and country. They will provide:*

- *A recreational route with footpaths and where possible bridleways, cycleways, and with links to the local rights of way network.*
- *A wildlife corridor and links to enable the movement of wildlife*

- *A landscape spine to be conserved and, where appropriate, enhancing the landscape, natural features and habitats.*"

2.83 The proposed route of the Pennine Bridleway will also be protected, along with the other sub-regional routes which link to it (Policy C11).

2.84 Policy recognises the importance of water based recreation within Rossendale's reservoirs. Policy C12 notes that any proposals to extend water based recreation will be assessed against their impact on residential amenity, safety requirements, the landscape, nature conservation and car parking needs.

Rossendale Alive: Our Sustainable Community Strategy 2008-2018 – The Rossendale Partnership (2008)

2.85 Both the Sustainable Community Strategy and Corporate Plan have a shared vision for the future of the Borough. This is that "*By 2018 Rossendale will have strong communities with an enhanced environment and heritage. It will be an attractive place to live, where tourists visit and employers invest*."

2.86 The strategy has three priorities – People, Places and Prosperity. The Places priority encourages Rossendale to "*develop sustainable communities, make efficient use of natural resources and encourage sustainable production and consumption along with minimising waste. We want affordable, high quality housing of all sizes and to have a transportation infrastructure that enables people to earn their living and enjoy their leisure time in an environmentally responsible manner*."

2.87 The Priority Outcomes of the Strategy include:

- *"We want clean town centres that are attractive to residents and visitors alike*
- *We want more people to come to Rossendale and enjoy our fantastic countryside and attractions which we will continue to protect and enhance*
- *We want a thriving economy based on the growth of our vibrant business service sector and attracting people here to enjoy our shops, cultural facilities and exciting adrenaline sports."*

2.88 Priority Outcome 10 (protecting and enhancing Rossendale's countryside and attractions) will involve:

- *"A year-on-year increase in the value of tourism to the Borough's economy*

- *An increase in the percentage of visitors and residents who are satisfied with the quality of the local environment*
- *An improvement in the Rights of Way network*
- *An increase number of countryside facilities enhanced or restored."*

2.89 Priority Outcome 12 (growth of the business service sector and attracting more people to the retail, culture and sports offer) will involve:

- *"An increase in the proportion of locally owned businesses in the leisure/tourism sector as a total percentage of the VAT registered businesses in Rossendale*
- *An increase in the proportion of locally owned businesses in the business services sector as a total percentage of the VAT registered businesses in Rossendale.*
- *A reduction in the number of vacant commercial properties in Bacup town centre."*

2.90 Key transformational projects include the 'Adrenaline Gateway', (which will make a wide range of adrenaline sports accessible to the people of the North West), the Manchester to Rawtenstall Commuter Rail Link and Rawtenstall Town Centre Regeneration (including new leisure and hotel provision).

Draft Neighbourhood Plans 2010-2013 – Rossendale Borough Council (2010)

2.91 The Borough Council has drafted four Neighbourhood Plans covering Rawtenstall; Bacup; Haslingden; Helmshore and Edenfield, and Whitworth. Each plan identifies a number of challenges/key issues, and these are summarised in Table 3.

Table 3 – Draft Neighbourhood Plans 2010-2013

Challenges/Key Issues Summary

Issue	Rawtenstall	Bacup	Haslingden, Helmshore, Edenfield	Whitworth
Tourism and leisure	✓	✓		✓
Town Centre	✓	✓	✓	✓
Regeneration/Economy	✓	✓	✓	✓
Transport/Access	✓	✓	✓	✓
Health and wellbeing	✓	✓	✓	✓
Families and young people	✓	✓	✓	✓
Rural issues	✓		✓	
Older people	✓			
Housing		✓	✓	
Community safety/anti social behaviour		✓	✓	
Environment	✓		✓	
Communication	✓		✓	
Traffic and parking	✓			✓
Sports				✓
Parks and open spaces	✓			✓
Provision of facilities			✓	✓

Source: Rossendale Borough Council 2010

2.92 Tourism and leisure feature as a challenge (and opportunity) in the Rawtenstall, Bacup and Whitworth Neighbourhood Plans. For Rawtenstall this challenge is to increase the number of local events; maximise the ELR and better promote the tourism offer. Maximising the local benefit of events such as the Folk Festival, is seen as a challenge for Bacup, and one which in part could be addressed by better publicity of the established events. For Whitworth the challenge is more about attracting increased visitor numbers; better promotion of the area and improved linkages between accommodation and the food and drink offer.

2.93 The Draft Neighbourhood Plans contain a number of suggested actions to address the identified tourism and leisure challenge. These are identified in Table 4, and are distinguished to the level of the three relevant individual Neighbourhood Plans. There are no suggested actions in the Haslingden, Helmshore and Edenfield Neighbourhood Plan.

Table 4 – Draft Neighbourhood Plans

Tourism and Leisure Challenge – Suggested Actions

Suggested Action	Rawtenstall	Bacup	Whitworth
Develop a Tourism Network and Communication Strategy	✓		
Share Tourism information/resources with relevant stakeholders	✓		
Promote via Visit Rossendale website	✓		
Support Local Events	✓		
Improve town centre signage, especially from ELR	✓		
Implement Markets Strategy	✓	✓	
Explore improvements to parking/toilets	✓		
Improve/promote footpaths/walking trails	✓		
Develop 'What's On' guide		✓	
Develop Stubbylee Park/Lee Quarry as visitor attractions		✓	
Develop cycle route via Adrenaline Gateway		✓	
Improve accommodation offer		✓	
Enhance Irwell, to provide attractive visitor destination		✓	
Improve information on walking routes		✓	
Improve maintenance of rural features (e.g. Cowm Reservoir)			✓
Better marketing of attractions			✓

Source: Rossendale Borough Council 2010

2.94 In both the Rawtenstall and Bacup Neighbourhood Plans the outcome of these actions is seen as *"Rossendale will protect and enhance its natural and built heritage, which will be recognised as an outstanding resource by visitors and residents. We will have doubled the size of our visitor economy by transforming our activity-based leisure, cultural and retail offer."*

2.95 For Whitworth the outcome of the proposed actions will be similar. The Draft Neighbourhood Plan states *"We will have doubled the size of our visitor economy by transforming our activity-based leisure and retail offer. We will also have encouraged the further development of our increasingly vibrant business services sector*."

2.96 However, no time period is referenced in the Draft Plans to the statement about doubling the size of the visitor economy.

2.97 Town Centre and retail challenges are a recurring theme of all the Draft Neighbourhood Plans. Rawtenstall aims to realise retail and commercial opportunities, whilst improving infrastructure such as public toilets provision and pedestrian access. This is to be achieved by promoting and supporting development opportunities such as the Valley Centre and New Hall Hey; supporting town centre events; enhancing public realm and pedestrian/vehicular flows and to address dereliction. The Plan also makes reference to a proposed town centre study that will review layout and flows; a planting scheme; possible development of a bandstand; maintaining and preserving key buildings to enhance the status as a mill town. For Whitworth the key challenge is the lack of a central 'heart', as well as a limited retail offer. Relevant actions proposed include attracting more tourist themed businesses; developing a historic centre; developing visitor accommodation and a 'What's On' guide; and organising more town centre events.

2.98 Other elements of the Rawtenstall Neighbourhood Plan pertinent to tourism are considering a community cinema in Rawtenstall; an Open Shop Arts project to enhance vacant retail properties; a more integrated public transport system, and the enhancement and better promotion of walking/cycling routes. The Bacup Plan also seeks to tackle access and public transport issues by promoting bus links via Todmorden, connecting with rail links to Manchester and Leeds.

2.99 The Haslingden, Helmshore and Edenfield Neighbourhood Plan identifies as a key environmental challenge the poor maintenance of the public realm. Improvements to public realm and signage are suggested. Haslingden's economy is seen as being weakened by a limited retail offer. This is to be addressed through developing a local business forum; a culture festival; better promotion of attractions; a possible park 'n' ride scheme linking to attractions; delivery of the Markets Strategy and improved signage.

Rossendale Corporate Plan 2009-2012 – Rossendale Borough Council (2009)

2.100 The Corporate Priorities of Rossendale Borough Council include:

- *"Delivering regeneration across the Borough – outcomes are: A thriving local economy, well performing town centres, a well balanced housing market*
- *Promoting the Borough – outcomes are: More people feel satisfied with Rossendale as a place to live, a thriving visitor economy, an improved understanding of the Council, its success and how to influence decision making."*

2.101 The Corporate Plan identifies a series of actions and projects for each outcome. For the 'thriving local economy' (Delivering regeneration across the Borough) outcome, relevant actions and projects include:

- *"Implementation of the Open Spaces Strategy to develop space, sport and recreation facilities which are high quality, attractive to users, well managed and maintained.*
- *Develop a marketing strategy for Rossendale Markets increasing the choice of shopping outlets and to reduce the costs associated with running the Markets.*
- *Deliver a series of regeneration initiatives to attract visitors and employment to the Borough."*

2.102 For the 'thriving visitor economy' (Delivering regeneration across the Borough) outcome, relevant actions and projects include:

- *"Develop tourism in Rossendale through supporting active area specific Tourism Working Groups*
- *Revamp the 'Visit Rossendale' website to enable a more user friendly and interactive site with a multi-search function so that users can find out more easily what they can do/see in Rossendale and launch a new Visitor Guide*
- *Establish Rossendale's priorities for leisure and cultural provision, in order to attract more people to the Borough and to ensure that we have sustainable leisure attractions encouraging people to visit*
- *Support the Pennine Lancashire Festival of food and culture."*

Place Directorate Business Plan 2010/11 – Rossendale Borough Council (2010)

2.103 The Place Directorate includes responsibilities for many elements of Rossendale's tourism offer. It has infrastructure responsibilities in terms of town centres' stewardship, maintaining and improving parks and open spaces. The Regeneration Team sits within the Directorate, with responsibility for the promotion of Rossendale's tourism offer. Culture and Leisure Strategies, and their implementation, are also areas of responsibility.

2.104 The Business Plan sets out action plans to address key priorities. Actions relevant to the Borough's tourism offer are set out in Table 5.

Table 5 – Place Directorate Business Plan 2010-11

Relevant Actions Proposed

Service Area	Action	Output/Outcome	Due By
Operations	Public realm improvements Phase 1	Co-ordinated improved maintenance standards on highway verges	March 2011
Communities	Revitalising Rossendale Markets Strategy Stage 2	Busy and vibrant markets	September 2010
Communities	Develop a Cultural Strategy	Strategy complete	October 2010
Communities	Implement Leisure Review recommendations	Stronger partnership with providers	March 2011
Communities	Review Rossendale Museum arrangements	Completed Development Plan	March 2011
Communities	Identify and support leisure/cultural events or projects	Minimum of 3 events/projects delivered in partnership	March 2011
Regeneration	Deliver Rossendale Gateway Regeneration Programme	Develop regeneration vehicles for key town centre sites	March 2011
Regeneration	Develop a revised Economic Strategy	Revised strategy	December 2010
Regeneration	Deliver Tourism Strategy	Deliver Year 1 of Tourism Strategy Action Plan	March 2011

Source: Rossendale Borough Council 2010

Business Directorate Business Plan 2010/11 – Rossendale Borough Council (2010)

2.105 The Borough Council's Planning Team are located within the Business Directorate. In terms of Tourism, they deal with both forward planning in terms of policy, and with planning applications.

2.106 The Business Plan includes, as one action, undertaking Conservation Area Appraisals for all the Borough's Conservation Areas, so that they are reviewed in line with Government guidance. These are to be completed by March 2011.

Open Space Strategy for Rossendale – Groundwork Pennine Lancashire/ Rossendale Borough Council (2008)

2.107 One strategy aim is to "*set out objectives and policies that contribute to creating integrated, good quality open spaces in Rossendale which meet the needs of the community and visitors to Rossendale.*" The strategy will achieve this by:

- *"Ensuring that the open spaces of Rossendale are planned and managed to* *provide an integrated provision of open space*

- *Provide recreational routes for walkers, joggers and cyclists*
- *Create managed signposted links between green space destinations, schools, community to countryside and community to community incorporating the Rights of Way network, existing parks and ancient highways*
- *Create ecological chains that allow the migration of species and increase biodiversity*
- *Increase the accessibility of public parks and leisure/community network routes."*

2.108 Although all of Rossendale's open spaces contribute to attracting visitors, the Borough's 'Green Corridors' (footpaths, bridleways, etc) provide the most direct visitor benefits. Objectives for green corridors are:

- *"Put in place visual way markers in priority wards, to inform the public of access routes to the countryside*
- *Complete a series of easy to read and use maps showing different routes and rights of way*
- *The Rossendale Way to be improved physically and with a series of visually interesting, easily distinguishable and coordinating way markers*
- *To improve physically the Irwell Sculpture Trail and update the sculpture with community-led projects. Ensure the entire length of the route is made concessionary, permissive or definitive status*
- *To work with LCC, private landowners, residents and users to create a valley bottom multi-use route for bridleway/walkers from Rawtenstall to Whitworth*
- *To work with LCC, private landowners, residents and users to complete the proposed cycleway between Rising Bridge and Stubbins."*

Rossendale Economic Strategy 2008-2011 – Rossendale Borough Council (2008)

2.109 The vision (linked to the economic vision of the Sustainable Community Strategy) of the strategy is that "*by 2020 Rossendale will have a balanced economy that has a rich and vibrant visitor economy based on the environmentally sensitive utilisation of our natural assets.*"

2.110 A key outcome of the strategy will be that Rossendale "*will have doubled the size of our visitor economy by transforming our activity-based leisure, cultural and retail* *offer.*"

2.111 At present, the Borough does not maximise the value of its countryside and heritage. Rossendale has the lowest number of bed spaces of any North West district, with no official caravan and camping sites. It also has the lowest number of employees in tourism related businesses in Lancashire.

2.112 The unmet economic potential of the visitor economy is recognised through the Rossendale Regeneration Board who are pursuing the 'Adrenaline Gateway' as a key attraction for the Borough.

2.113 Other relevant actions include production of a development plan for the arts, heritage and cultural economy and improved marketing of Rossendale, both internally and externally as a place to visit (including a marketing strategy).

Summary

2.114 A number of national planning policy statements and guidance notes intended to assist local authority policy makers have implications for the tourism sector. Key amongst these are the recently published PPS4 and DCLG's Good Practice Guide on Planning for Tourism.

2.115 At the North West level the role and contribution of tourism to the regional economy has been embedded in key strategic documents. These are the established Regional Spatial Strategy (RSS) and Regional Economic Strategy, as well as the recently produced Regional Strategy – Part 1. The RSS provides a steer to the preparation of a tourism strategy for Rossendale, recognising that the North West must improve the overall quality of the tourism offer, not just the quantity of attractions. It also highlights that the impacts of tourism on the environment, transport infrastructure and access to local facilities must be taken into account. However, as this report was being drafted the Government announced its plans to remove the statutory regional planning and spatial strategy requirements. Whilst the landscape of responsibilities has yet to be confirmed, it is understood that Part 2 of the Regional Strategy, due to define policies and actions, will not now be produced.

2.116 The Strategy for Tourism in England's North West, produced by the NWDA, reinforces the steer from the RSS. However, the strategy covers only the period 2003-2010. As yet no successor strategy is being prepared.

2.117 At the sub-regional level of Lancashire, the lead responsibility for tourism is taken by the Lancashire & Blackpool Tourist Board (L&BTB). L&BTB's Visitor Economy Strategy addresses a vision through to 2016, and includes two 'winning' themes relevant to Rossendale. 'Country Escapes' refers to rural activities, including the development of adrenaline sports, quality accommodation and the food offer. 'Living Legends' addresses key cultural and historic attractions. L&BTB's current Destination Management Plan includes both Growth and Performance Targets that help to inform current and future economic benefits for Rossendale.

2.118 The now defunct Lancashire Economic Partnership prepared a sub-regional economic strategy and action plan for the three years to 2009. Of the six strategic headline priorities, three are applicable to the preparation of Rossendale's tourism strategy. These are the Pennine Lancashire Transformation Agenda; Skills; Tourism and Rural Development. As yet no successor strategy has been prepared.

2.119 The importance of tourism is reflected in numerous existing and emerging strategic, planning and action plan documents produced by Rossendale Borough Council. These widely recognise the potential to develop and expand the Borough's tourism, leisure and recreation attraction. They acknowledge there is scope to achieve this across all sub-areas of the Borough, identifying a range of actions that should or could be implemented. Some are applicable at the Borough-wide level. Others are local area specific.

3.0 BACKGROUND INFORMATION

Introduction

3.1 This section provides a review of key background documents relating to the tourist markets of Lancashire and the North West. They set a context for the rest of the study. Many of them have informed the strategies covered in Section 2.0, however they do not have any policy authority in their own right.

3.2 It should be recognised that these summaries reflect, in part, the available evidence at the time of writing and the perception of the lead organisation. Since then, factors on the ground may have changed, and this is reflected in later research.

National

OECD Tourism Trends and Policies – OECE (2010)

3.3 The Organisation for Economic Co-operation and Development (OECD) has recently published a report on tourism trends and policies relating to 42 countries, the majority of which are OECD members. Whilst the report clearly addresses the macro market of international tourism, it does provide some commentary of pertinence to Rossendale's tourism economy.

3.4 The report notes the impact of the financial and economic crisis led to a decline in tourism flows, in the second half of 2008, of over 4 percent compared to the previous year. The decline deepened at the beginning of 2009, by 12.5 and 6.5 percent respectively in the first and second quarters. International tourism has been affected more than domestic tourism; business tourism more than leisure tourism; hotels more than other types of accommodation. Paradoxically certain forms of tourism were only slightly impacted or even experienced growth in this period – for example self-catering.

3.5 OECD comment that maximising tourism's full economic potential requires an integrated approach to policy development across many government departments. It recognises the difficulties of cross government policy co-ordination in an environment where the tourism portfolio may be less influential than others. This means this area remains a major challenge for tourism planning and policy makers.

3.6 The most important actions central to the success of the tourism industry are identified as:

- *"Investment in quality and skills*
- *Marketing and branding*
- *Product development and innovation*
- *Long term strategic planning*
- *Reducing barriers tourism development*
- *A culture of evaluation and capacity building*
- *Co-operation and partnerships."*

3.7 Long-term tourism policies need to be developed consistently to be effective, though they should keep a margin of flexibility in their implementation to adapt to emerging needs and changing trends. Better information systems, adequate transport and other infrastructure, and a focus on local development issues are important components in the development of long-term tourism strategies.

3.8 Key trends noted include:

- *"A tendency towards shorter stays*
- *Online reservations continue to rise*
- *Small and medium enterprises have an important role. They are responsible for at least 60 percent of employment*
- *Tourism jobs are a dynamic component of employment, with the bulk of employment concentrated in accommodation (especially restaurant and food services)."*

3.9 Indeed, the internet is fundamentally changing the tourism industry, as all types of businesses, large or small, from anywhere in the value chain, can now communicate directly with their customers. And, the consumer can now be at the heart of the value chain. Therefore, public and private sector players in tourism need to ensure that the quality of information provided to the consumer is fully competitive with the consumer's next best option.

3.10 Labour market issues are of fundamental importance. Competition for labour from those sectors of the economy showing higher productivity growth, an ability to pay more and offer better career development opportunities, is leading to labour and skills shortages in tourism. Yet the long-term prospects for tourism growth are good, so the need to attract, train and retain higher quality labour is at the core of the industry's longer-term growth. Upskilling will help to raise productivity; equip employees to respond to the realities of the knowledge economy, and to ensure skills exist in sustainable tourism practice. A culture of life-long learning needs to be introduced, which will raise skill levels and enhance career development opportunities. This should make it easier to retain key staff.

3.11 However, the predominance of SMEs in tourism service providers presents challenges in the context of ensuring that training and skills improvement programmes are available to smaller businesses.

Investing in Creative Industries: A Guide for Local Authorities – LGA, I&DEA, DCMS (2010)

3.12 This guide has been developed to support local authority decision making regarding investment in creative industries. Creative industries are defined as *"those industries which have their origin in individual creativity, skill and talent which have a potential for job and wealth creation through the generation and exploitation of intellectual property".* The definition includes the following sectors:

- Advertising
- Architecture
- Art and antiques
- Computer games
- Crafts
- Design
- Designer fashion
- Film and Video
- Music
- Performing arts
- Publishing
- Software
- TV and Radio.

3.13 Creative industries have the potential to generate jobs, innovation and productivity, as well stimulating new ideas and thinking in local communities. They are the fastest growing segment of the economy. Between 1995 and 2005, 12 jobs were created in such industries for every one job created in other industries. In 2006, creative industries contributed £57.3 billon to the UK economy and accounted for 7 percent of all businesses.

3.14 In the North West, software and advertising are the dominant creative industries. Architecture, publishing, music and the visual and performing arts are also significant employers, with companies focused in Manchester.

3.15 Creative industries should therefore be a priority for local authority investment. The likely methods of such investment are:

- Financial capital (funding and information about funding) – helping businesses to access credit will be key during the present recession
- Human capital (skills programmes and enterprise support) – skills shortages can be a barrier to creative industry growth
- Physical capital (e.g. creative workspace) – developing good quality workspace will benefit both creative industries and the wider local economy, especially if delivered as part of a holistic regeneration programme
- Market capital (e.g. festivals, events) – helping local creative industries position themselves in the wider market place will benefit them while enhancing the wider visitor economy
- Social capital (e.g. supporting networks) – promoting co-ordination of business networks can help creative industries innovate more effectively and access new business opportunities.

3.16 Table 6 highlights a number of best practice lessons for local authority investment in creative industries.

Table 6 – Supporting Creative Industries, Best Practice Lessons

Lesson	Issues
Local context matters when selecting interventions	Small towns or rural areas will lack the infrastructure and catchment to support some types of creative industry (e.g. major performing arts facilities) Large conurbations are more likely to suffer from congestion of displacement. Maintaining and improving a stock of low cost space, in accessible locations, will be key Specific industries will have specific requirements, e.g. the needs of a publishing firm will be very different from that of a visual artist The identity of a place and the cultural products produced will be linked. Investment should look at promoting local history and culture
Partnership is vital	Partnerships, both public-private and between industries are key to effective working
Leadership and vision matter	Strong leadership and clear vision are vital to drive through effective strategies, particularly in the face of competing priorities
Appropriate measures of success should be selected	Not all creative industries will deliver high employment and strong GVA growth. More realistic gains can often be made in increased visitor numbers, place marketing or attractiveness to further investment
Interventions need to respond to demand	The real needs of local creative industries should be identified early on, to avoid waste or duplication of resources

Source: LGA, I&DEA, DCMS, 2010

The Economic Impact of Heritage in the North West – NWDA (2004)

3.17 The objective of this study is to demonstrate the current and potential future economic value of heritage in the North West. The study defines heritage as *"material evidence which physically documents aspects of the social and economic development of the region".* This includes:

- Built heritage – listed buildings and conservation areas
- Archaeology and historic landscapes – scheduled ancient monuments, registered parks and gardens
- Archives and collections – museums, galleries, archives and their collections
- Historic events – events and activities that have developed historical significance.

3.18 The study refers to numbers of listed buildings, scheduled ancient monuments and registered parks and gardens at risk in the region. However no reference is made to conservation areas at risk. There is no breakdown to individual local authority areas.

3.19 The study's assessment of economic impacts is divided into the following impact areas:

- Tourism and visitor economy
- Management and operation of heritage and conservation activities
- Business
- Skills
- Property value impact
- Wider impacts on the vitality of urban and rural areas.

3.20 The key economic impacts, in each impact area, are summarised in Table 7.

Table 7 – Heritage Impacts Assessment

Impact Area	Key North West Impacts
Tourism and visitor economy	Heritage attractions received 8.5 million visitors in 2006 An estimated £2.03 billion in spending was generated by heritage visitors in 2007 (£1.75 billion associated with visits to historic townscapes, £28 million at historic landmarks and attractions) 20,403 jobs are supported (4582 in Lancashire)
Management and operation of heritage and conservation activities	10,772 people are directly or indirectly employed in maintaining heritage landmarks (8003 in Lancashire), generating £1.61 billion in GVA (£328.6 million in Lancashire).
Business	17,863 sqm of historic (pre-1939) floorspace is occupied by office, industrial or retail businesses (4416 sqm in Lancashire), employing 548,000 people (128,000 in Lancashire)
Skills	35 percent of businesses active in heritage construction report recruitment difficulties at the professional level, a quarter at the technical level
Property value impact	The value of residential properties built before 1901 is between 8 and 34 percent higher than those built after 1990
Wider impacts on the vitality of urban and rural areas	Increasing desirability of cities and towns as holiday destinations Increasing desirability of cities and towns as shopping destinations Creation of diverse visitor experiences

Source: NWDA 2009

Tourism in England's North West: A Strategic Marketing Framework and Action Plan – NWDA (2004)

3.21 The Action Plan has been developed to direct continued growth and directly affect public investment in the tourism sector. The five sub-regional tourist boards will use local knowledge, skills and expertise to bring about growth in tourism. They will be supported by NWDA in developing individual strategies for marketing, product development and skills.

3.22 The focus is on the British domestic market, with business and leisure tourism as key priorities. The strategic marketing priorities are:

- *"Understanding our markets*
- *Growing tourism*
- *Extending the season*
- *Increasing the regional spread of tourism*
- *Making it easier for visitors*

- *Improving the regions image*
- *Adding value to the industry*
- *Best practice in marketing*
- *Ensuring stakeholder benefit*
- *Improving quality."*

Planning for Tourism and the Visitor Economy in the North West – NWDA (2008)

3.23 This study was commissioned to investigate if the planning system could be used more effectively to support the regional visitor economy. The aims of the study are to:

- Explore how planning policy could better support tourism and the visitor economy in the North West
- Provide recommendations on policy development, to inform future reviews of the RSS and LDFs.

3.24 The study recommends that the RSS and LDFs should include:

- *"A vision and strategy for tourism*
- *How this contributes to broader objectives*
- *The level of growth in tourism that is targeted*
- *What the spatial characteristics of this will be*
- *What the scale and distribution of tourist activity in an area is or is likely to be*
- *Likely future trends and changes in volume, distribution and type of activity*
- *What the implications of those trends are for land-use, traffic flows, and the transport system*
- *Identification of areas in the region where there are, or are likely to be, any problems associated with growth or decline in tourism*
- *How increased demand for tourism might be best accommodated*
- *Environmental impacts of tourism and how they can be tackled*
- *The need to protect key tourism assets*
- *Ways in which tourism can contribute positively to other objectives."*

3.25 The study found that planning officers are aware of regional strategies for tourism but that those strategies do not have a major impact on policy. In addition, few thought that good quality tourism data was available for their districts.

3.26 Recommendations include:

- A number of good practice case studies are required to provide practical guidance on planning for tourism, addressing relevant issues for the North West
- A series of tourism planning seminars should be held to address these issues
- Local authorities and tourist boards should work closer
- Data on tourism and the visitor economy should be of better quality and used more effectively
- Local authorities should consider the value of identifying land for the tourism/ visitor economy.

England's Northwest – Tourism Volume and Value 2008 – NWDA

3.27 This publication provides data and commentary on the most up to date figures (2008). It shows that within the North West all tourism revenue equates to £2123 per head of population. For Lancashire and Blackpool the figure is slightly higher at £2143.

3.28 Across the region day visitors account for 77 percent of visitor days, but only 63 percent of expenditure. Visitors staying in serviced accommodation generate a higher yield. Although accounting for only 9 percent of days, they contribute 24 percent of spend.

3.29 A breakdown of where tourism related expenditure is spent indicates that almost one third (32 percent) is indirect expenditure (i.e. the multiplier impact-spend by tourism related businesses). Shopping is the next highest share (25 percent), followed by Food and Drink (18 percent). These two are the primary expenditure areas for both day and staying visits. The other areas are Accommodation (11 percent), Transport (9 percent) and lastly Recreation (5 percent).

3.30 Indirect employment and shopping each account for around one quarter of tourism related employment (24 percent and 26 percent respectively). Food and Drink (21 percent), Accommodation (16 percent), Recreation (8 percent) and Transport (5 percent) provide the remainder.

3.31 Patterns of tourism vary significantly at sub-regional levels. Table 8 compares Lancashire against the regional figures.

Table 8 – Trip Types. Analysis by Percentage Share – 2008

	Serviced Accommodation %	Non-serviced Accommodation %	Staying with Friends or Relatives %	Day Visitors %	Total %
Visitor Days					
North West	9	7	8	77	100
Lancashire and Blackpool	12	12	8	68	100
Visitor Expenditure					
North West	24	7	6	63	100
Lancashire and Blackpool	34	14	5	47	100

Source: NWDA 2010

3.32 Table 8 shows that for Lancashire and Blackpool day visitors represent the majority of visitor days, but a minority of expenditure. The figures highlight the importance of visitors using serviced accommodation.

3.33 Average spend figures are provided. These are a function of length of stay and spend per day – which is in turn is driven by a number of factors such as purpose of visit, accommodation stock. Table 9 illustrates the spend per trip by different visitor types, again comparing Lancashire and Blackpool with the North West average.

Table 9 – Average spend by Visitor Type – Spend £ per Trip – 2008

	Serviced Accommodation £	Non-Serviced Accommodation £	Staying with Friends or Relatives £	Day Visitors £	All Visitors £
North West	218	272	78	34	48
Lancashire and Blackpool	246	307	71	27	50

Source: NWDA 2010

3.34 Figures are also provided to show the total spend by all visitors using a bedspace. On average across the North West a bedspace (both serviced and non-serviced) generated £12,900 per annum. The annual average is higher for serviced bedspaces, at £18,800. The respective figures for Lancashire and Blackpool are somewhat lower – £10,200 and £12,700. This reflects the generally lower occupancy levels and lower accommodation rates. This is because there is a higher proportion of non-service spaces and guesthouses/B&B accommodation, rather than 3* or 4* hotels.

3.35 Tourism related employment accounts for 7.1 percent of the region's total employment. The proportion is higher in Lancashire and Blackpool, at 8.4 percent. There are significant differences across the North West in the sectors of employment for tourism related employment, and as Table 10 shows this is the case for some elements in Lancashire and Blackpool.

Table 10 – Sector Analysis of Tourism Related Employment – Percentage Share North West, Lancashire and Blackpool Comparisons – 2008

	Accommodation %	**Percentage Food and Drink %**	**Recreation %**	**Shopping %**	**Transport %**	**Indirect Employment %**
North West	15	21	8	26	5	24
Lancashire and Blackpool	27	22	4	26	3	18

Source: NWDA 2010

3.36 The higher proportion of accommodation related employment reflects the large number of operators, often smaller, in Lancashire and Blackpool.

North West Tourism Trends Bulletin – 2009 Performance and 2010 Prospects – NWDA

Tourism Trends – 2009

Nationally

3.37 Overseas tourism sector experienced a downturn in 2009, although a more optimistic forecast for 2010 is reflected in growth in the first quarter of holiday visits (up 4 percent from previous year) and business travel (up 12 percent). Visiting Friends or Relatives however was 4 percent down.

3.38 The domestic market place was more robust. Trips were up by 7 percent in 2009 (over 2008) with spend up 4 percent. This increase is due to strong growth in pure holiday trips (up 17 percent). The non-serviced accommodation sector particularly benefitted, with self-catering up by 26 percent.

The North West

3.39 The North West, although experiencing a similar pattern to the national picture, fared worse in terms of overseas visitors. Domestic trips growth was in line with the UK experience. This led to domestic tourism being above pre-recessionary levels – North West trips in 2009 were 5 percent above 2007 levels, higher than the 2 percent increase across the UK.

3.40 The positive trend results from holiday tourism, reflected by growth in the self-catering (up 24 percent) and caravanning and camping sectors (34 percent increase).

3.41 Serviced occupancy levels showed a downturn. This includes the downturn in business tourism experienced particularly in city centre hotels rather than more rural locations like Rossendale.

Tourism Prospects – 2010

Nationally

3.42 VisitEngland's Business Confidence Monitor (Easter 2010) reveals 82 percent of accommodation businesses are very or fairly confident about Spring and Summer 2010, despite actual business levels being reduced for 45 percent of them.

3.43 The appeal of domestic holidays appears to be strengthening. 75 percent of businesses felt domestic business would be higher than the pre-recession period.

3.44 VisitEngland research carried out in 2009 highlights a number of macro trends relating to holidays:

- The economic environment (recession/exchange rate) is still making it less attractive than it was to travel overseas. This has been heightened by media encouragement
- The growing desire to learn and experience more of this country. However especially amongst younger consumers there is a lack of knowledge about what to do, or where to go
- Many are seeking experiences to culturally enrich their lives. For some this means connecting with history and heritage – for others it is celebrating modernity and diversity.

The North West

3.45 The North West is acknowledged to be well positioned to exploit opportunities, with its combination of modern dynamic cities, historic and rural offers. In Lancashire the L&BTB 1st quarter business performance survey highlights 37 percent of operators are forecasting increased business, with 43 percent expecting a static position.

The Economic Value of Green Infrastructure – Natural Economy North West (2007)

Growing Natural Tourism – Natural Economy Northwest (2007)

Natural Tourism Summary Report – Natural Economy Northwest (2007)

3.46 These three related reports were commissioned by the NWDA and Natural England. They highlight the case for green infrastructure investment and the benefits accruing to the tourism economy as well as the growth opportunity offered by sustainable natural tourism.

3.47 Economic benefits of green infrastructure interventions are seen to include tourism (rural tourism supports 37,500 jobs in the Northwest); and recreation and leisure (footpaths, cyclepaths and bridleways enable healthy, low-cost recreation).

3.48 Natural Tourism is tourism that is based on, and motivated by, experiencing the natural environment. Much is relatively passive (enjoying the scenery, eating out) but there are also activities that take place in the natural environment e.g. walking and cycling; adrenaline activities; wildlife watching; leisure learning and events/festivals with a natural environment theme. Natural tourism therefore sits well with Rossendale's visitor offer. It could provide opportunities for new business development and increased profitability; expansion of the range of products and experiences on offer to visitors; opportunities for developing skills, and supports sustainability development by ensuring resources are properly managed and that there is access for all.

3.49 The reports recognise that, infrastructure investment may be necessary to enable such tourism to take place. This includes footpaths, bridleways, signposting, picnic areas and countryside information, as well as car parking, cafes and toilets. With these are issues of sustainability as green space could be vulnerable to overuse. Managing access and provision of visitor facilities therefore needs to be considered alongside product development and marketing.

3.50 How natural tourism might realise its potential in contributing to economic growth and image improvement is summarised under the aspects of Infrastructure, Environmental Interpretation and Collaborative Marketing.

3.51 Infrastructure related projects could be targeted at sites (or groups of smaller sites in a defined geographical area) which attract significant visitor numbers, and where the attraction is based on important natural environmental assets. These could be:

- *"Car park creation/improvement (and related road/on-site signage)*
- *New/improved toilets*
- *Footpath creation/upgrading/repairs*
- *Capital costs of establishing new bus services*
- *Visitor management measures (fences/signage/hides)."*

3.52 Environmental interpretation covers all types of communication with visitors at sites. It is seen as enhancing visitor stay time and spending, as well as profile raising. Site based interpretation projects could include:

- *"Preparing interpretation plans, together with the production and installation of interpretation and communications materials such as on-site boards, trails, artworks, guidebooks*
- *Enhancing physical access and visitor infrastructure, such as trails boardwalks, viewpoints*
- *Modern visitor centres*
- *The use of radio, telephone and camera technology to bring natural environment images into buildings and to mobile phones."*

3.53 Collaborative marketing could be promoted, drawing in groups of at least four businesses (tourism clusters). New packages should be established and marketed, based on at least two types of operator – natural tourism businesses, accommodation providers, local food producers, natural asset managers. The marketing could include new, or the expansion of existing, special events and festivals based on the natural environment.

Sub Regional

West Pennine Moors Management Plan (2010-2020) – Lancashire County Council (2010)

3.54 The West Pennine Moors (WPM) is an area of 90 square miles of moorland, reservoirs, woodland and historic villages. The area has a rich natural and cultural heritage which is highly accessible to the surrounding towns and cities. It is managed by a partnership of seven local authorities (including Rossendale), United Utilities, regional agencies, community groups, wildlife groups and recreational user groups.

3.55 The partnership aims to:

- *"Protect, conserve and enhance the area's natural and cultural heritage*
- *Promote sustainable regeneration*
- *Encourage enjoyment and sustainable tourism."*

3.56 The overall visions of the Management Plan are to "*Protect, enhance and celebrate the 'landscape heritage' of the WPM (i.e. both natural and cultural), involving local communities, both rural and urban, and other stakeholders in the planning and delivery of landscape actions.*" Also to "*Develop and promote 'good practice' in*:

- *Sustainable tourism*
- *Wildlife conservation*
- *Responding to climate change*
- *Managing land to provide ecosystem services.*"

3.57 'Sustainable Tourism' is defined as "*tourism that is committed to making a low impact on the natural environment and local culture, while helping to generate income and employment for local people.*"

3.58 A number of key issues affect the WPM, driven by factors such as climate change, development pressure, economic growth, demands for recreation and changes in agriculture and the broader economy. The key issues have been organised under six headings:

- *"Natural and Historic Environment*
- *Community and Education*
- *Local Economy*
- *Enjoyment and Access*

- *Partnership Management*
- *Responding to Climate Change."*

3.59 Under the 'Natural and Historic Environment' heading, relevant issues include "*increased tourism resulting in reduced tranquillity for residents*". Under 'Local Economy', the issues are:

- *"Limited links between local producers and local markets; limited awareness or support for producers by local populations*
- *The need to enhance awareness of local businesses, such as those offering local food, drink and accommodation and their association with the WPM (and with each other."*

3.60 Under the 'Enjoyment and Access' heading, there are five relevant issues:

- *"Ensure increased tourism does not result in pressure on key tourist destinations, which may cause erosion, loss of habitat, reduced tranquility and thus a poorer visitor experience*
- *Tourism should not be discouraged by schemes aiming to reduce the impact of visitors – the goal being 'sustainable tourism' rather than a reduction in tourism*
- *The need to encourage interaction and compromise between different user groups; helping to avoid tensions or conflict*
- *Some destinations in the WPM are more popular attractions than others, causing pressure on those areas and providing unlocked recreational potential in less popular areas*
- *Potential to educate and provide interpretation for visitors, helping to ensure appropriate use of the landscape."*

3.61 The draft objectives for the WPM Management Plan are organised under the same six headings. Relevant objectives under Local Economy aim to

- *"Support sustainable tourism businesses*
- *Encourage the tourism value of local food and drink*
- *Support and promote local accommodation providers*
- *Raise awareness of the WPM in gateway towns and key service centres*
- *Encourage and promote thematic business 'clusters', targeting specific visitor interests (or types of visitor)."*

3.62 Relevant objectives under Enjoyment and Access aim to:

- *"Improve the provision of interpretation and visitor information*
- *Improve visitor management at 'honeypot' sites (aiming to reduce visitor pressure and antisocial behaviour)*
- *Provide and promote high quality opportunities for recreation*
- *Improve the quality of visitor facilities*
- *Monitor the impact of visitors on the landscape."*

3.63 The Management Plan translates these objectives into a range of actions for the partner organisations. Actions highlight the need to promote opportunities for sustainable tourism in the WPM, through collective marketing by venues and WPM communication channels. Tourist venues should work with the L&BTB to establish thematic clusters, focusing on key areas of visitor interest.

3.64 Actions also focus on improving the built and natural environment, including improvements to the quality and accessibility of visitor attractions, footpaths/bridleways and associated signage and interpretation facilities. Finally, visitor attractions are encouraged to collect, analyse and share visitor information to inform development and marketing decisions.

South Pennines Landscape Character Area (No.36) – Natural England

3.65 Rossendale falls within the Southern Pennines LCA, which lies between the Peak District and Yorkshire Dales National Parks, and the Greater Manchester, Lancashire and West Yorkshire conurbations. Over seven million people live within an hour's drive of its centre, with the conurbations acknowledged as generating intense pressure for recreation, sport and tourism. The proximity of the population to the surrounding uplands is a distinctive feature, typified in Rossendale by dense settlements such as Haslingden and Bacup.

3.66 The LCA comments that quarrying is largely restricted to the moorland fringe, with the exception of the heavily quarried valley at Whitworth. Other intrusions include wind farms, transmitter masts and above Bacup, large spates of 400kv overhead power lines which become prominent features visible from long distances.

3.67 The area's strong industrial heritage is noted, particularly the textile mills that dominate the urban skyline and dwarf the stone terraces which radiate from them.

3.68 A number of factors influencing the change to the area's countryside character are identified. These include the:

- *"Conversion of barns and derelict farmsheds*
- *Introduction of windfarms and phone/radio transmitter masts*
- *Evolution and transformation of the industrial base in valley settlements*
- *Dereliction or conversation of many mills for alternative use*
- *Growth of recreation as a major land use, bringing a potential for erosion and increased car borne traffic."*

3.69 The LCA's suggestions for shaping the future make reference to considering sympathetic conversation of redundant farm and mill buildings on the edge of urban areas. The retention and re-use of industrial heritage facilities, particularly mill buildings, is seen as important.

Draft Pennine Lancashire Visitor Infrastructure Study – Regenerate Pennine Lancashire (2009)

3.70 Pennine Lancashire comprises the districts of Blackburn with Darwen, Burnley, Hyndburn, Pendle, Ribble Valley and Rossendale. Together with Lancashire County Council, these local authorities have signed the Pennine Lancashire Multi Area Agreement (MAA). The study aims to "*assess the 'visitor infrastructure' of Pennine Lancashire and make recommendations as to what the opportunities are and investment priorities should be.*"

3.71 Rossendale Borough Council has made a number of comments relating to the conclusions and recommendations of this study. Where relevant, these are also highlighted below.

3.72 The Study identifies a range of strategic initiatives which could boost the visitor economy:

- *"Apply the name 'Pennine Lancashire' to the M65 Corridor, and work to raise its profile*
- *Make 'England's Cycle Country' (or a variation) the main focus for destination development in the Pennine Lancashire MAA, aiming to make it a regional 'Attack Brand'*
- *Group walking festivals under the Pennine Lancashire brand*

- *Develop the Leeds-Liverpool Canal as a focus recreational resource and the main physical Pennine Lancashire 'Signature Project'*
- *Use the regional 'Powerhouse' campaign (marketing campaign led by Marketing Manchester) to promote the heritage of Pennine Lancashire*
- *Improve visitor facilities at Pendle Hill and promote it more*
- *Continue to develop and promote the Ribble Valley as the primary 'foodie' destination in the North West (n.b. Rossendale Borough Council also consider Rossendale to be a 'foodie' destination due to its strong food offer)*
- *Develop a modern style cosmopolitan food market in one of the M65 towns*
- *Make the Weaver's Triangle the main 'Powerhouse Development Project'*
- *Evolve 'Pennine Squared' (public realm improvement project) into an 'Urban Oasis' Strategy (a broader strategy linking public realm to the retail/food offer)."*

3.73 The Study audits the existing visitor offer in Pennine Lancashire (attractions, events, etc) and undertakes a SWOT analysis. Table 11 provides a summary of the elements most relevant to Rossendale.

Table 11 – Pennine Lancashire Visitor Economy SWOT, Relevant Extracts

Strengths	Weaknesses
Market – Substantial day trip market with 7 million living within an hour of Accrington Access – Good road (M65/M66), rail (East Lancashire Railway), and bus (the Witch Way to Manchester) links Built and Natural Environment – Good built (industrial architecture) and natural environment Events – All districts, including Rossendale, have vibrant event programmes Food and Drink – Ribble Valley is the focus, but Rossendale also has a strong food offer	Visitor Services – Towns in Rossendale (unlike other districts in Pennine Lancashire) generally have a limited range of visitor information services or interpretation facilities Access – No link to the West Coast Main Line, no direct rail link to Manchester (although this may be addressed through opportunities at the ELR) Accommodation – No higher end hotels, limited conference facilities Cultural and Heritage Attractions – No 'star' attractions, many heritage attractions in isolated locations, key attractions not promoted Retail – Limited independent retail offer, some indoor markets are dated, with no visitor appeal Visitor Services – Interpretation and way finding is patchy, marketing activity is fragmented
Opportunities	**Threats**
Market – Potential markets include the Manchester/Liverpool Conurbations and West Yorkshire Access – Extensions to the East Lancashire Railway, also opportunities to rebrand key road/rail routes Accommodation – Interest for a 40-bed hotel in Whitworth/Rawtenstall Built and Natural Environment – Improved marketing e.g. the 'Adrenaline Gateway' Food and Drink – Ribble Valley is the focus, but Rossendale also has a growing food offer (in both quality and number of venues)	Access – Failure to invest in public transport will impact on the visitor offer Accommodation – Economic conditions may make filling gaps in provision difficult Visitor Services – Failure to achieve a clear branding framework will make it difficult for Pennine Lancashire initiatives to have a long term impact

Source: Elevate East Lancashire 2009

East Lancashire Railway Trust Development Strategy – East Lancashire Railway Trust (2009)

3.74 This study aims to:

- *"Quantify and provide clear evidence of the benefits of past investment by Trust Partners and Strategic Funders*
- *Mark the position of the ELR in terms of its status as a major operator within the visitor economy*
- *Provide a clear statement of the ELR's Development Strategy which outlines its priorities for project and organisational development."*

3.75 The study also sets out a wider vision for the ELR, that "*by 2020 the East Lancashire Railway will be firmly established as a top North West England tourist attraction that consistently achieves high customer satisfaction ratings in terms of its quality, value for money, range of events and the wider tourism experience on offer to visitors to Greater Manchester and Lancashire.*"

3.76 The study reviews the socio-economic benefits of the ELR to the North West, highlighting that the railway attracts more that 100,000 visitors a year, generates £3.85 million in annual gross expenditure and supports 70 jobs. Other socio-economic impacts are summarised in Table 12.

3.77 Development priorities in Rossendale focus on Rawtenstall Station. The study notes that while Rawtenstall Station has an attractive building, its current facilities and setting provide a poor visitor experience.

3.78 Short-term plans will focus on improving signage, lighting and walkways between the station and Rawtenstall Town Centre (along with a café extension and other improvements in the station itself). The East Lancashire Railway Trust (ELR Trust) will also to work with town centre traders to host joint heritage events and explore joint marketing possibilities. The viability of a heritage bus link between the station and the town centre will be reviewed.

3.79 Over the long term, the ELR Trust will work with RBC to develop common plans for the improvement of Rawtenstall Town Centre and continue to build relationships with local traders. Stubbins Halt will also be investigated as a further development opportunity in Rossendale.

Table 12 – ELR, Key Indicators of Economic Value

Indicator	
Visits to the ELR	107,950 (in 2007)
Visits made by visitors from outside the NW	16,277 (15 percent of the total)
Visits linked to the ELR events programme	70,000 (65 percent of the total)
Number of educational beneficiaries	1952 children from 40 schools (in 2008)
Total gross expenditure generated for the regional economy (direct, indirect and induced)	£3.85 million
ELR indirect expenditure with local companies	£320,000

Indicator	
ELR indirect expenditure within the region (60 percent)	£792,000
Average visitor spending off site (per person, per day)	Day visitor (from the local area) - £3.30 Day visitor (from outside of the local area) - £13 Staying visitor - £13
Employment supported in the regional economy (direct, indirect and induced)	70
Total regional gross value added	£1.6 million
Heritage value	13 miles of railway reinstated and assets safeguarded or enhanced
Volunteering value of 60 full time equivalent posts (approx. value pa)	£1.561 million
Direct environmental benefits (ELR land brought back into use)	74 ha
Catalytic investment along the ELR corridor (1989-2007)	More than £10 million (including trade increases in Rawtenstall Town Centre)
Public sector investment secured (1984-2008)	£8.72 million

Source: East Lancashire Railway Trust 2009

Draft East Lancashire/West Rochdale Area Study – GMPTE (now GMITA) (2010)

3.80 This study identifies opportunities to improve transport links from Rossendale and West Rochdale to Manchester City Centre. The study is ongoing and has identified 14 options including:

- Schemes (heavy rail or Metrolink) using the ELR for commercial rail services, potentially including a park and ride facility in Rossendale
- Bus based park and ride schemes
- Bus priority measures (including bus lanes, sections of bus only road, traffic signal priority measures and M60/M66 hard shoulder running)
- GMITA ‘Target Bus Network’ proposals
- Traffic management measures.

3.81 A key option would be to run commercial diesel railcar services from Rawtenstall to Manchester Victoria Station, via the ELR. Such a scheme (using a heritage railway for national rail services) would be unique in the UK. It would involve the creation of park and ride facilities at Rawtenstall (possibly on the former college site, although this is separated from the station by a dual carriageway) and Ewood Bridge.

3.82 Although the ELR track could (with investment) support modern trains, there would be a number of practical issues to resolve. These include retaining the heritage nature of the line; the need to attract a commercial rail operator to develop and manage the commuter services; co-ordinating peak time commuter services with heritage trains; line upgrading and signalling changes will cost £15-20 million.

Connecting Communities: Expanding Access to the Rail Network/Technical Note on East Lancashire – ATOC (2009/10)

3.83 The objectives of this study are to help current and potential rail passengers by:

- *"Providing better access to the rail network from towns that currently have no direct rail links*
- *Providing attractive new services and easier station access that will encourage more passengers to switch to rail from other modes, and to provide the capacity that they will require*
- *Adapting the present network to meet new needs arising from the changing demographic trends of the last quarter century and the population growth projected for the next 25 years."*

3.84 This study endorses the proposal for a commuter rail link along the ELR (discussed above) as the 4th best rail expansion project in the country. It could support up to 466,000 passengers a year and offer hourly services to Manchester Victoria. The estimated annual revenue would be £3.71 million. The proposal would be dependant on converting a civil engineering depot at Castleton for passenger use and alterations to the ELR that would ensure its suitability for commercial rail services.

3.85 The study suggests indicative capital costs of £50 million, although all other sources suggest the figure to be £25 million. The estimated annual operating cost would be £1.25 million.

Local

Retail and Town Centre Study, Update – Rossendale Borough Council (2009)

3.86 This study considers the need and capacity for new convenience, comparison and leisure floorspace in Rossendale. It also identifies possible future development sites.

3.87 The study concludes that Rossendale has a limited commercial leisure, entertainment and cultural offer, with residents visiting surrounding large centres

(Bury, Rochdale, Accrington and Burnley) to undertake such activities. There is little scope for the provision of large leisure facilities in Rossendale (cinemas, ten-pin bowling, etc) due to the Borough's relatively modest population and the strength of facilities in nearby centres. However, the evening economy could be enhanced with additional restaurants and bars.

3.88 Future town centre development (e.g. the Valley Centre) should provide additional space for leisure, restaurant/café and retail uses. An allowance of 10-15 percent of new restaurant/café floorspace, over and above high street comparison retail projections, may be appropriate. The retail offer of Rossendale is discussed further in Section 5.

3.89 The study highlights the New Hall Hey scheme which, if implemented, would provide significant additional leisure/restaurant floorspace. The study also recommends that the Borough Council should consolidate public funding on existing Council owned leisure facilities, in order to improve the quality of provision.

Tourism Marketing Plan for Rossendale – Rossendale Borough Council (2005)

3.90 This Marketing Plan aims to develop a "*compelling tourism marketing action plan for Rossendale, using tourism as a key economic driver*". The Plan has four strategic objectives:

- *"Raise the profile of Rossendale and the Borough as a visitor and business tourism destination*
- *Increase visitor traffic to Rossendale*
- *Increase awareness of Rossendale's facilities and resources*
- *Increase value of tourism in Rossendale by encouraging visitors to extend their stay and increase their spend."*

3.91 Through stakeholder consultation the Plan identified six main challenges to the further growth of the tourism market in Rossendale:

- *"Location of the Information Centre (the One Stop Shop may not be the best location)*
- *A Tourism Representative does not exist (now addressed)*
- *Fragmented promotional material*
- *No centralised Rossendale website*
- *Visitor Guide not used to full potential*

- *Lack of collaboration (between the public and private sectors, at the local and regional levels)."*

3.92 Other key issues are summarised in Table 13, along with recommendations as to how they could be addressed.

Table 13 – Other Key Issues

Issue	Comments	Recommendation
Accommodation	• *Limited accommodation with large numbers of rooms* • *Limited collaboration between providers* • *Limited promotion to potential visitors* • *Not immediate issue but unlikely to support long-term growth in numbers*	*Short-term:* • *Increase partnership between providers* • *Utilise LOIS for on-line booking* *Long-term:* • *Consider building a hotel – in-line with adrenaline concept* • *Farmers unused land – diversification e.g. Camp Sites/ Holiday Homes utilising Lancashire Rural Futures for support*
Transport	• *Current transport network could not support an increase in visitor numbers* • *Movement of visitors around the Borough* • *Information for visitors* • *Links between attractions* • *ELR gateway under utilised*	• *Transport Strategy* • *Shuttle buses between attractions*
Information on wider tourism offer in Rossendale	*Lack of information on all-round experience of Rossendale*	*Packages could be created incorporating all elements of a full visit and made available to visitors using marketing methods*
Resistance to change	*Rossendale stakeholders may be reluctant to change*	• *Stakeholders should be kept informed of changes and provided an opportunity to voice their opinions* • *Tourism Relationship Manager should act as an impartial advocate /conduit*
Retail opening hours	*Inconsistent, may be required to open on Sundays if this will enhance the visitor experience*	• *Create relationships via Tourism Relationship Manager* • *Work with retailers to obtain their opinions* • *Create a 2 way relationship* • *Highlight benefits to retailers*
Public facilities	*In a poor state*	*Incorporate in regeneration plans*
Funding	*Lack of all-round knowledge as to funding available*	*Tourism Relationship Manager to advise in collaboration with external bodies*

Source: Rossendale Borough Council 2005

3.93 The unique features of Rossendale's tourism offer are primarily found in the Borough's landscape, tourism attractions (e.g. Ski Rossendale) and rural/sporting activities (e.g. the Irwell Sculpture Trail, 'Adrenaline Gateway'). The Borough is also easily accessible to a range of surrounding towns and cities.

3.94 Over the long term (15 years) Rossendale needs to incorporate a number of plans:

- Rawtenstall's Town Centre regeneration plan
- Bacup as an Eco-town
- Adrenaline Concept
- Regional Park within the West Pennine Moors.

3.95 The implementation of these plans combined with a strategic approach to tourism opportunities should ensure a healthy, sustainable tourism offer. Rossendale should also market itself better to business tourists and use the Lancashire and Blackpool Tourist Board awards to raise the profile of local attractions and accommodation. It is noted however that Bacup is now more likely to be promoted as a Heritage Town.

Rossendale Culture Review – Rossendale Borough Council (2009)

3.96 This represented a residents survey to gather feedback that will help to influence the Leisure Review, and aid the development of the Cultural Strategy for Rossendale.

3.97 The survey generated mixed opinion on Rossendale as a place to undertake cultural activities. There was almost equilibrium in the numbers believing it to be good or poor. Whilst Rossendale Museum is the most favoured facility, Marl Pits swimming pool is seen to be the most important. Paradoxically, Bacup leisure hall, whilst both the least favoured and the least important, is reported as a well used facility.

3.98 In terms of the 'great outdoors' local parks are used on at least a weekly basis by over a quarter of all the survey's respondents. Whittaker and Stubbylee/Moorlands are the most popular parks. Over half the respondents would like to see more outdoor events and festivals to help implore the cultural offering. There is strong dissatisfaction with the condition of the outdoor sports facilities and provision of special events. There is leakage to areas such as Manchester, Burnley and Bury for leisure activity.

3.99 Manchester is the most favoured location for taking part in cultural activities, although Rossendale is a close second. Food and/or drink festivals or events are the most popular activity planned for participation in Rossendale in the next twelve months.

3.100 The respondents consider there has been no real change in the quality of cultural activities over the last three years. Three quarters support Council investment in sport, leisure and culture.

3.101 The survey did identify some confusion about the definition of culture. Some residents do not see sport and leisure as a cultural offering. It also found the Borough Council to be adding to this confusion. At times culture is used to embrace sports and leisure, but there are occasions were the sports and leisure element is separated out.

3.102 The Cultural Board of the Rossendale Partnership is in the process of writing a Cultural Strategy for Rossendale.

Leisure Review – Options Appraisal – Rossendale Borough Council (2009)

3.103 The Borough Council commissioned a review of its existing leisure facilities, arts and sports development. The review considered the impact of the work being undertaken to develop a project plan for a new swimming pool; the options for development and improvement of Ski Rossendale, and the decision related to development or closure of Bacup Leisure Hall. A series of options were appraised.

3.104 The preferred option identified by the review comprises:

- Closure of Bacup Leisure Hall, unless an alternative arrangement can be found to keep it open
- Rossendale Leisure Trust to surrender its lease on Ski Rossendale, and work with the Borough Council to procure a new investment/operating partner
- The Borough Council to provide a swimming pool at Haslingden Sports Centre
- The Borough Council to provide a fitness and 5-a-side offer, and upgrade the pool, at Mari Pits
- The Borough Council to continue to facilitate the swimming pool provision in Whitworth by providing a revenue grant to Community Leisure Association of Whitworth (CLAW)
- Future Borough Council capital investment should mainly focus to align to the

above recommendations.

3.105 The Borough Council has subsequently agreed to support this option.

Ski Rossendale Review & Option Assessment – Rossendale Leisure Trust (2009)

3.106 The report provides a high-level review of the issues faced by Ski Rossendale, and the options available to the Leisure Trust and Borough Council. The report examines the then present conditions and challenges faced by what once was the UK's premier artificial skiing centre.

3.107 Despite a decline in use and income, a deteriorating fabric and the completion from a growing number of facilities, the report highlights the site's inherent strengths. It also refers to the potential commercial advantages that outdoor facilities could have over higher profile indoor venues.

3.108 The decline in use has accelerated in recent years. From 68,957 users in 2006, the figure fell to 58,553 in 2008 and was projected to drop to 47,689 in 2009. Within these numbers, people skiing or snowboarding actually expanded significantly but nowhere near enough to counterbalance the overall decrease. Other uses (e.g. parties and tubing) have remained largely static or decreased. The largest fall (a 66 percent decrease) has been demand from ski/snowboarding parties, followed by courses/lessons/coaching (a 56 percent fall).

3.109 The report gives five reasons for this decline:

- *"The opening of competing centres (e.g. Chill Factor)*
- *The credit crunch and weakness of the pound*
- *A perception that artificial 'real' snow is better for learning*
- *A lack of investment and modernisation at Ski Rossendale (e.g. many facilities 30 years old)*
- *A lack of promotion and marketing."*

3.110 Because of these issues, RBC is now looking to secure an external investor/provider to develop a sustainable future for Ski Rossendale.

Revitalising Rossendale Markets Marketing Plan – Rossendale Borough

Council (2009)

3.111 The Marketing Plan addresses the Borough's three traditional markets in Bacup, Haslingden and Rawtenstall. It acknowledges there has not previously been a formal strategy in place for promoting the markets. Nor has there been research around customer numbers and what the markets offer for them.

3.112 The Marketing Plan seeks to target improvement around the number of customers (increasing footfall to each market by 10 percent); decreasing vacancies on permanent licensed stalls by half at each market (reducing the current 10 percent vacancy rate to 5 percent), and increasing by 50 percent the number of regular casual traders at each market.

3.113 In support of these targets, a detailed Action Plan has been drawn up with a number of the key actions now implemented. These include a developed branding; promotional leaflets produced and circulated; a customer charter and relaunch of the three markets supported by media advertising.

Singletrack Weekender, Initial Evaluation Report – Rossendale Borough Council/Lancashire County Developments Ltd (2009)

3.114 The report profiles visitors to the 2009 Singletrack Weekender, which attracted around 170 participants and 350 spectators. 70 percent of participants camped in Lee Quarry, having travelled from across the North West and UK (indicating the national appeal of the event). Most spent £11-£50 in Rossendale, primarily on food and general shopping. Average spend was £41. Almost all came to Rossendale solely to compete in the Weekender, while 40 percent were visiting Lee Quarry for the first time.

3.115 Most spectators came from Rossendale or elsewhere in Lancashire and are therefore day visitors, spending less in the area. Average spend was £15. As with participants, most spectators came solely to attend the Weekender. Specialist mountain biking magazines/websites are the main way that participants and spectators found out about the event. Local newspapers (and word of mouth) also advertised the event to Rossendale residents.

3.116 Participants and spectators generally found Lee Quarry excellent or good, and would like to see more trails provided. They would also like to see more food and drink, toilets, showers and affordable accommodation (bunkhouses and campsites).

Summary

3.117 This section has reviewed numerous studies and action plans that have direct or indirect influence on tourism activity in Rossendale. Worldwide research by OECD into the impact of the recession on tourism trends shows international tourism, business tourism and hotels being affected more than domestic tourism, leisure tourism and other types of accommodation. Indeed the self-catering sector has experienced some growth. The research notes trends towards shorter stays, the key role of small and medium size enterprises in tourism and the increasing importance of the internet for reservations. It suggests long-term prospects for tourism growth are good, with the need to attract upskill and retain higher quality labour being at the core of the sector's longer-term growth.

3.118 The review has included national and regional guides on the economic impacts of creative industries, heritage and natural tourism. Work produced by the NWDA, for the region, includes investigation of how the planning system might be better used to support the visitor economy. Amongst the recommendations of the latter study (noted at paragraph 3.6) are a number that set a framework for the preparation of Rossendale's Tourism Strategy and its linkage with the LDF. NWDA published data and commentary on the regional and sub-regional volume and value of tourism also provides benchmarks against which Rossendale's performance can be measured.

3.119 Two currently still draft sub-regional documents are also key influences to be taken into account. The West Pennine Moors Management Plan (2010-2020) and Draft Pennine Lancashire Visitor Infrastructure Study (2009) identify issues and actions that will need to be considered in framing the Borough's Tourism Strategy. It is noted that not all the Visitor Infrastructure Study recommendations as to what the opportunities are, and investment priorities should be, accord with the views of the Borough Council.

3.120 Technical studies undertaken by ATOC (2009/10) and GMITA (2010) highlight the possibility of using the ELR as a commuter rail link to Manchester. If achieved, this would be the first time a heritage railway has been used to provide mainline rail services. However, there are issues (technical, financial, and operational) which need to be addressed to secure the delivery of such a link.

3.121 The Borough Council has conducted several local studies that impact on the tourism sector. These have reviewed the retail sector (including town centres); the cultural offer and leisure provision. A Tourism Marketing Plan, produced in 2005, remains in place. A 'Revitalising Rossendale Markets' Marketing Plan was produced in 2009. The ELR Development Strategy (2009) identifies the specific development plans of that visitor attraction.

3.122 The Retail and Town Centre Study concluded that the Borough has a limited commercial leisure, entertainment and cultural offer. There is leakage to facilities in the neighbouring large centres (e.g. Bury, Rochdale, Accrington, and Burnley) and thus little scope for the provision of large leisure facilities in Rossendale. Whilst the strength of these existing facilities and the Borough's relatively modest population militate against new large-scale investment, the evening economy could be enhanced with additional restaurants and bars.

3.123 The 2005 Tourism Marketing Plan has seen progress against some of the identified main challenges to growth of the Borough's tourism market. A Tourism Officer is in place; key projects are building collaboration between the public and private sectors; the Rossendale web site and Visitor Guide are being enhanced and better used.

3.124 The tourism offer is primarily centred on the Borough's landscape, existing attractions such as Ski Rossendale and the rural/sporting activities. The Borough Council is currently considering proposals to transfer Ski Rossendale to the private sector, in order to secure the required investment to update facilities. Sporting events include the Singletrack Weekender, which attracts 170 participants from across the UK.

3.125 The direction of future provision in Council sports and leisure facilities has been set and agreed through the 2009 Leisure Review Options Appraisal. Implementation is well advanced of the Action Plan drawn up to revitalise the three traditional markets. A Cultural Strategy is being drafted.

4.0 TOURIST INDUSTRY CONTEXT

Introduction

4.1 To understand how Rossendale can increase its tourism value, it is appropriate to consider what actually constitutes tourism, reviewing the wider picture and not just the commonly perceived holidaymaker market.

4.2 This section also looks at the statistical trends that are applicable to Rossendale, using regional, county and local level data. However, in most cases statistics are only available for the years 2005 to 2008, while the L&BTB only has data for 2008 and 2009.

What is Tourism?

4.3 The definition of tourism is broad and embraces all visitors to the Borough, whether they are British or from abroad. It covers anyone who is staying overnight, on holiday, for business or visiting friends or relatives. It also includes those visiting the Borough on day trips, primarily for leisure purposes as opposed to regular education or work trips.

4.4 There were approximately 295 million domestic trips to the North West in 2008, generating £14.3 billion in revenue. Table 14 shows the purposes of those trips.

Table 14 – Purpose of Domestic Tourism in the North West (percent), 2008

Purpose	Trips (%)	Spending (%)
Holiday	48	58
Visiting Friends or Relatives	35	22
Business and Work	15	19
Other	2	1
Total	**100**	**100**

Source: NWDA 2009

4.5 The proportional share of different types of tourism illustrates the importance of ‘visiting friends or relatives’ and ‘business’ alongside the traditional holiday.

4.6 Visiting Friends or Relatives includes friends and families making visits from anywhere in the country. This type of visitor can be either a day, touring or overnight visitor.

4.7 Business tourists are generally a higher spending segment, visiting for a specific purpose (e.g. meetings or conferences), rather than for pleasure.

4.8 The ‘Other’ field in Table 14 includes educational tourism, which can be day trips or residential courses organised by schools, adult education, colleges or universities.

4.9 There were a further 2.5 million overseas trips to the region, generating a direct spend of £850 million. The main purpose of such trips was visiting friends or relatives (36 percent of trips and 30 percent of spending). Holidays accounted for 25 percent of trips and spending, while 27 percent of trips (and 25 percent of spending) were for business.

4.10 As Table 15 illustrates, 30 million visitors to the North West stayed overnight (for one or more nights) in 2008. Over a third of these did not use specialist accommodation, preferring to stay at friends or relatives houses. More than half stayed in serviced accommodation and the remainder in non-serviced (self-catering) accommodation. Those who stayed in serviced accommodation accounted for almost two thirds of spending, which makes attracting these tourists to Rossendale so important.

Table 15 – Accommodation Type, 2008

Type	Visitor Numbers	Spend, £
Serviced Accommodation	15,990,000	3,484,220,000
Non-Serviced Accommodation	3,430,000	930,520,000
Staying with Friends or Relatives	10,670,000	834,560,000
Total	**30,090,000**	**5,249,300,000**

Source: Global Tourism Solutions 2009

The Tourism Sector

4.11 The North West’s tourism industry employs 220,000 people, 6.7 percent of the workforce. Tourism was worth £14.3 billion in 2008 (18-19 percent of total GDP), a 9 percent increase on 2005’s figure.

4.12 Growth in the tourism sector has been largely driven by a number of socio-demographic changes amongst UK consumers:

- Increases in personal disposable income and household expenditure (which has grown by 2-5 percent per year since 1996)
- Long term growth in the UK economy and reductions in unemployment

- Changes in socio-economic groupings, particularly increases in the most affluent consumers (ABC1)
- Increases in 'time poor – cash rich' consumers, higher spending groups working long hours, who prize their limited leisure time
- An ageing population with increasing numbers of retired consumers retaining relatively high incomes.

4.13 The trend is away from long, seaside holidays which used to dominate the domestic holiday market, while there has been growth in business tourism, short breaks and activity-based holidays.

Business Tourism

4.14 There were around 21.4 million business trips to the North West in 2008, which generated £2.7 billion. The most frequent trip purposes were:

- Meetings (32 percent of trips, 24 percent of spending)
- Contract work (17 percent of trips, 19 percent of spending)
- Conferences (7 percent of trips, 9 percent of spending)
- Work placements (11 percent of trips, 5 percent of spending).

4.15 Most business tourists (64 percent) stay in serviced accommodation, mostly hotels. The majority of conferences (58 percent) are also held in hotels. Most trips (and conferences) last only one night.

4.16 The destination of the trip is determined by the circumstances of job and only 18 percent of North West business visitors report having a choice of venues.

Short Breaks

4.17 The number of short breaks (less than four days) taken by UK residents and overseas visitors has seen year on year increases since 1995. Key to this has been the growth of single travellers, with limited leisure time. In 2008 the average holiday length was two days, with only 2 percent of holidays taking more than seven days.

Visitor Attractions

4.18 Across the UK, attendance at visitor attractions (paid and free) has increased by an average of 2-3 percent a year since 2003. Attendance growth in the North West has consistently been above national averages, ranging from 3 percent in 2004/5 to 13 percent in 2007/8 (due, in part, to the Liverpool Capital of Culture).

4.19 However, the annual increase in revenue from North West attractions (3 percent) was below the national average (5 percent) in 2007/8. In part, this represents a growth in visits to free visitor attractions (e.g. major museums, places of worship, country parks) over paid attractions (e.g. theme parks, zoos).

4.20 VisitEngland identifies 20 North West attractions that received more than 130,000 visitors in 2008. Only two are in Lancashire and Blackpool, and neither is in Rossendale.

Day Visits

4.21 There were approximately 265 million day visits to the North West in 2008 (up from 242 million in 2005), spending around £9 billion. 29 percent of visits were to friends/relatives. Of the rest, ‘general days out’ and leisure activities (e.g. walking) accounted for 14 and 13 percent of trips, visiting tourist attractions another 11 percent. Meals and nights out accounted for 8 percent of trips each and shopping another 6 percent.

4.22 Day visitors spent an average of £29.14 per trip, but shopping trips generate significantly more spending (£76.15 per trip) as do nights out (£39.39 per trip).

Tourism in Lancashire

4.23 Lancashire (which includes Blackpool in most research) attracted 60 million visitors in 2008, generating £3 billion in revenue (up from £2.5 billion in 2005) and employing 54,651 people. Table 16 profiles the tourism market in Lancashire, compared to the wider North West.

Table 16 – The Lancashire Tourist Economy, 2008

	Lancashire and Blackpool	North West	Percentage of North West Total
Visitor Numbers	*60,190,000*	*294,780,000*	*20.4*
Day Visitors	52,330,000	264,690,000	19.8
Staying Visitors	7,860,000	30,090,000	26.1
Revenue (£)	*3,031,970,000*	*14,287,460,000*	*21.2*
Day Visitors	1,428,280,000	9,038,160,000	15.8
Staying Visitors	1,603,690,000	5,249,300,000	30.6
Revenue, percentage growth 2006-2008			
Total	*17.1*	*7.4*	-
Day Visitors	21.7	10.0	
Staying Visitors	12.9	4.4	
Tourism Jobs	54,651	220,000	24.8

Source: Global Tourism Solutions 2009

4.24 Table 16 shows that Lancashire and Blackpool attracts over a quarter of the North West's staying visitors and 30 percent of the revenue generated from such visitors. This is partly due to the strong bed and breakfast/guesthouse offer in Blackpool and other resort towns. Revenue growth has also been much higher in Lancashire than in the region as a whole and the county accounts for a quarter of all tourist jobs.

4.25 The NWDA and L&BTB have both undertaken studies into Lancashire's tourism market during 2009. These indicate that Blackpool is the key tourist destination attracting 56 percent of staying visitors and 27 percent of day visitors. It is also the preferred destination of those considering a holiday in Lancashire. However, the town is strongly self-contained and tourism in Blackpool provides few benefits for the wider county.

4.26 Of those who stay in Lancashire, most stay one or two nights. More than half (53 percent) stay in serviced accommodation (primarily bed and breakfast/guesthouses). Most non-serviced accommodation is either static caravans/holiday centres or self-catering flats/cottages. Mobile caravans, camping and hostels are only a minor part of Lancashire's tourism offer.

4.27 For staying and day visitors, eating out (which accounts for 20 percent of spending), general exploration/touring, and shopping (which accounts for a quarter of spending) were the main activities. Half of all staying visitors attended a visitor attraction, but only 12 percent of day visitors did.

4.28 L&BTB surveyed 33 visitor attractions in 2009, which recorded 1.4 million visitors (a 6 percent increase on 2008). Again Blackpool performed well (attracting 323,750 visitors), but so did Lancaster and West Lancashire (attracting 443,351 and 252,935 visitors). Rossendale only attracted 26,439 visitors (the second lowest after Preston). However, only two Rossendale visitor attractions were surveyed (these were not named).

4.29 Lancashire and Blackpool attracted 3.5 million business trips in 2008 (16 percent of the North West total). Although less than Greater Manchester and Merseyside, this is more than Cheshire and Cumbria (which attracted 3.3 and 2.6 million trips). Blackpool is most popular for conferences and company outings.

4.30 Rural Lancashire (including the Forest of Bowland, Ribble Valley and the Pennines) attracts only 8 percent of staying visitors. The number of day visitors is not known. Rural tourism is most popular among couples over 35 who have no children at home.

4.31 Rural tourism in Lancashire faces strong competition from Cumbria, where the market is far more established. Compared to the Lake District, landscape attractions in Lancashire have a low profile, particularly to visitors from outside of the region.

4.32 The NWDA see the greatest potential for future growth being in Lancashire's major attractions (e.g. the Pleasure Beach) and evening economy. Blackpool will remain dominant in this regard, but there is scope for other towns (such as Preston) to market themselves as nightlife destinations.

4.33 In Lancaster and Rural Lancashire, heritage attractions are the most significant visitor activity and an area in which Lancashire is able to compete with Greater Manchester and Merseyside.

4.34 Rural Lancashire (including the Forest of Bowland, Ribble Valley and the Pennines) attracts only 8 percent of staying visitors. The number of day visitors is not known. Rural tourism is most popular among couples over 35 who have no children at home.

4.35 Rural tourism in Lancashire faces strong competition from Cumbria, where the market is far more established. Compared to the Lake District, landscape attractions in Lancashire have a low profile, particularly to visitors from outside of the region.

4.36 The countryside is not necessarily a strong motivating or positioning theme for Lancashire. Across the county walking, riding and other rural activities are not a major element of the tourism market, although they are inevitably more important in rural destinations. Perhaps surprisingly, landscape and scenery are seen as weak motivations for visiting Lancashire.

4.37 However, key landscape attractions in Lancashire are seen as having strong 'novelty value' by virtue of their physical features, associated history, etc. Taking better advantage of this could provide a more competitive positioning for Rural Lancashire.

The Developing Tourist Market

4.38 Previous research by BE Group associated with the tourism economy suggests that tourists of the future are likely to be:

- More affluent, but also more cautious with their money
- More likely than ever to be travelling alone
- Likely to take more breaks of shorter duration
- Short of time and therefore seeking leisure and business tourism experiences which require minimum effort to research and book
- Increasingly knowledgeable and keen to tailor to individual needs, rather than buying a 'package'
- Older, but fitter, and less likely to accept a sedentary lifestyle.

4.39 Consequently, some key themes are affecting the future of tourism:

Quality

4.40 There is increasing demand for higher quality accommodation. Brands that have offered quality at a fixed price – meeting consumers' increasing desire for convenience, consistent standards and value for money – have been especially successful, e.g. Travelodge. This is also reflected in growth in consortia offering the same package, e.g. Pride of Britain (independent hotels) and English Country Cottages. The quality of accommodation and customer care are key factors in deciding whether or not to make a return visit.

Business Tourism

4.41 One of the most lucrative, yet least acknowledged, components of the tourism industry is business tourism – meetings, incentive travel, conventions and exhibitions. Business tourists demand high quality standards, yield high receipts and utilise many venues otherwise poorly patronised out of season.

Sustainability

4.42 Although it is recognised that tourism damages the environment the general public believe very little is done to mitigate the effects of this. While the link between enjoying our built and heritage, conservation and sustainability is recognised, the proportion of tourists who actually use environmentally friendly organisations is actually quite low. However, this may be more of an issue for organisations whose remit includes a protective role.

Niche Markets

4.43 There is a growing diversification of the tourism market into various quality and experience segments. This means paying for high quality experiences, refined pleasures, self-development, activity holidays and the like.

Technology

4.44 As technology becomes even more user-friendly, the level of self-booking and use of the internet will only increase, especially as internet penetration widens and security fears diminish. This, combined with the previous influence (niche markets) also explains, in part, the dramatic rise in independent travel – another strong trend.

Summary

4.45 The tourist industry is incredibly valuable in terms of direct and indirect revenue and the support it provides for so many other aspects of the economic and community make-up of an area.

4.46 It is also a complex industry which requires co-ordinated, strategic thinking if it is to be harnessed to its fullest.

4.47 It is important to look at tourism in its broadest sense, considering the international aspect, the holiday-maker, a local visiting friends, the businessman attending a conference – all have their part to play (some a high value part) in generating tourist income. To capture this spend, their needs must be met.

4.48 Tourism is about far more than a week long holiday, visitor attractions, hotels and caravan sites.

4.49 It is a competitive, dynamic market characterised (at the moment) by growth in short, weekend breaks; high value business tourism; educational and activity breaks; shopping; increasing quality expectations. A market influenced by an increasingly wealthy, independent, ageing population.

4.50 In Lancashire, Blackpool dominates most aspects of the tourism market apart from heritage tourism. Heritage has the most scope to deliver benefits to Lancashire's historic towns and rural districts.

4.51 Tourism in Rural Lancashire is underdeveloped and countryside destinations struggle to compete with the Lake District. The landscape and rural activities are not generally a major part of the tourism offer. However, many landscape attractions have unique features and history, and marketing them is dependant on building up their identities. There are therefore opportunities for Rossendale to improve its market share, if it can 'stand out' from the competition.

5.0 TOURISM IN ROSSENDALE

Introduction

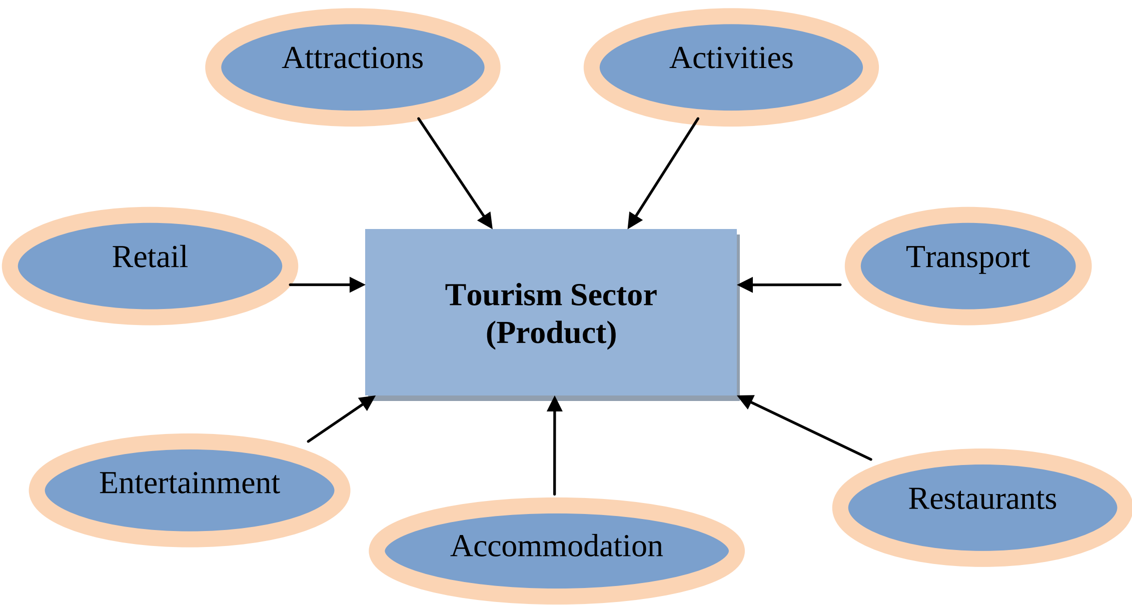
5.1 In this section we consider the scale of tourism in Rossendale, the local tourist market, and how that market is changing. Reference is made to the current and future volume and value of the tourism economy in the Borough – which is addressed in greater detail in the separate Economic Analysis report produced in conjunction with this study (Appendix 7).

5.2 The information contained in this section has been gathered either from established public data or directly from the local tourist organisations/businesses/event managers. Reference to any venue or event in this study does not, unless otherwise stated, constitute endorsement of that venue or event. No comment can be made as to whether there is full compliance with legislation applicable to the activities, facilities or services they provide. No warranty is given as to the accuracy of the information gathered or supplied.

Structure of the Tourism Sector

5.3 Figure 2 identifies the key elements of the supply side of the tourism sector (product). The study needs to examine all of these elements.

Figure 2 – Tourism Sector – Supply Side Elements



5.4 The section also provides an initial audit of the tourism facilities in Rossendale. This audit is an essential element of the study as it allows us to understand the current scale of the tourism offer. It is a picture of 'where Rossendale is now', which when matched to a vision of 'where Rossendale wants to be in 2027' will enable policy to be drawn up that will move the Borough between these two points.

5.5 This audit has been informed by a survey of tourist businesses and event managers. This was carried out to gather empirical evidence about the tourism market in Rossendale and to identify opportunities and constraints for the future growth of the tourism sector. The business survey is discussed in more detail, in Section 6.

5.6 This section also reviews the proposed new tourism developments and future opportunities for growth that will strengthen Rossendale's visitor offer over the next few years.

Tourism in Rossendale

5.7 The Borough Council is inextricably linked with the tourism sector. It relates to tourism businesses through the services it delivers as a regulatory and planning authority; as a funder, facility owner, manager, infrastructure and service provider. The Borough Council has a role in managing the natural and cultural resources tourism relies on; it provides core infrastructure, attractions and facilities, and in conjunction with other public agencies contributes to marketing and visitor information.

5.8 Much of the quality of the visitor experience derives from the environment, amenities and services at a destination. Balanced tourism development therefore requires a public/private partnership approach, and the evidence base gathering for Rossendale will need to establish how well this is being delivered. It needs to understand whether there are gaps in the product range and/or poor quality facilities that make the area less attractive to visitors. This extends, as the brief recognises, to supporting infrastructure – as a lack of transport and/or accommodation will deter visitors from travelling to and stopping in, Rossendale.

Visitor Numbers

5.9 Volume and Value Tourism Data (STEAM), indicates that 2.17 million visitors came to the Borough in 2008 the product of a small annual growth trend since 2006. This comprised around 2 million day visitors and 125,000 overnight visitors (see Table

17). Of the overnight visitors, 86 percent were visiting friends/relatives.

5.10 Table 17 shows visitor numbers between 2005 and 2008. Over that period, the most significant growth has been for overnight visitors, particularly those staying in non-serviced accommodation. This is the only segment to have generated an increase in the average length of stay – up 11 percent from 2006. This reflects the changing trend in tourism for individually organised, bespoke holidays. Day visitor numbers decreased between 2005 and 2006, with limited growth since then.

5.11 The statistics for Rossendale demonstrate differences, some marked, with sub regional and regional averages. Day visitors represent 94 percent of all the Borough's visitors. This is higher than the North West (90 percent) and Lancashire Blackpool (87 percent) figures. Consequently, the percentage of staying visitors, at 6 percent, is less than half the sub-regional rate of 13 percent. For overnight visitors, in Rossendale 86 percent stay with Friends or Relatives. This compares with a rate of only 35 percent for the whole of the North West.

Table 17 – Rossendale Visitor Numbers 2005-2008

Tourist Numbers	2005	2006	2007	2008
Serviced Accommodation	13,830	12,830	13,890	15,310
Non-Serviced Accommodation	1,060	1,410	1,700	1,600
Staying with Friends or Relatives	105,320	105,770	104,700	107,850
Day Visitors	2,117,120	2,031,440	2,047,230	2,044,610
Total	**2,237,330**	**2,151,450**	**2,167,520**	**2,169,370**

Source: Global Tourism Solutions 2007-2009

Hotel Occupancy

5.12 Hotel occupancy figures are not available for Rossendale alone. Statistics for Lancashire are only available for 2008 and 2009 (see Table 18).

Table 18 – Lancashire and Blackpool Average Room Occupancy (percent) 2008-2009

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2008	45	45	46	46	55	48	58	64	57	64	47	46
2009	30	38	37	48	46	45	53	55	59	64	46	-

Source: L&BTB 2010

5.13 The figures provide little clarity of a defined main tourist season. Nevertheless, for both years, occupancy levels only exceed 50 percent between July and October. However, the domination of hotel provision in Blackpool and its particular market characteristics will inevitably skew the figures, and not necessarily reflect trends for Rossendale.

Value of Tourism

5.14 In 2008 the value of tourism to Rossendale was £67 million. The greatest amount of spend was generated by day visitors due to their sheer volume (over 2 million), spending £56 million. Overnight visitors staying in serviced/non-serviced accommodation accounted for only six percent of spending.

5.15 Table 19 shows trends in visitor spending, between 2005 and 2008. The most significant growth has been amongst those staying in accommodation, with spending by those in non-serviced accommodation more than doubling. Spending by day visitors decreased between 2005 and 2006, with modest growth since then. This reflects trends in visitor numbers.

Table 19 – Rossendale Revenue by Category of Visitor (£)

Tourist Numbers	2005(£)	2006(£)	2007(£)	2008(£)
Serviced Accommodation	2,520,000	2,310,000	3,470,000	3,760,000
Non-Serviced Accommodation	240,000	360,000	580,000	540,000
Staying with Friends or Relatives	8,810,000	8,870,000	6,860,000	7,060,000
Day Visitors	56,290,000	54,010,000	55,880,000	55,810,000
Total	**67,860,000**	**65,550,000**	**66,790,000**	**67,170,000**

Source: Global Tourism Solutions 2007-2009

5.16 The main things people spend money on when visiting the Borough are shopping and eating out. This illustrates the importance of these two areas to the tourism offer of Rossendale. A further £17 million in indirect expenditure was generated as hotels, shops, etc, purchased wholesale goods and services, to meet the needs of visitors.

5.17 Table 20 presents the distribution in visitor spending between 2005 and 2008. However, differences in data analysis of some elements of the total expenditure, between 2005/6 and 2007/8, mean that the figures are not comparable.

Table 20 – Rossendale Expenditure by Sector (£)

Tourist Numbers	2005(£)	2006(£)	2007(£)	2008(£)
Accommodation	1,070,000	990,000	1,000,000	1,050,000
Food and Drink	12,340,000	11,950,000	16,450,000	16,530,000
Recreation	4,950,000	4,780,000	2,420,000	2,440,000
Shopping	17,930,000	17,300,000	18,880,000	18,960,000
Transport	6,760,000	6,550,000	3,620,000	3,660,000
Indirect Expenditure	17,280,000	16,690,000	17,000,000	17,080,000
VAT	7,540,000	7,290,000	7,420,000	7,460,000
Total	**67,870,000**	**65,550,000**	**66,790,000**	**67,180,000**

Source: Global Tourism Solutions 2009

5.18 The 2008 STEAM data shows that tourism directly supported 870 full time jobs, the majority being employed in the retail and food and drink sectors. A further 228 were employed by local firms who indirectly benefit from tourism (e.g. specialist food producers). Table 21 shows tourism jobs by sector for 2005 and 2006. Again breakdown figures for 2005/6 and 2007/8 are not comparable due to different accounting methods. Overall though there is a relatively flat picture of the total jobs generated.

Table 21 – Rossendale Tourism Jobs by Sector

Tourist Sector	2005 (Jobs)	2006 (Jobs)	2007 (Jobs)	2008 (Jobs)
Accommodation	91	89	95	95
Food and Drink	268	256	329	334
Recreation	130	124	59	60
Shopping	354	336	345	348
Transport	66	63	32	33
Total Direct Employment	909	868	860	870
Indirect Employment	248	236	224	228
Total	**1,157**	**1,104**	**1,084**	**1,098**

Source: Global Tourism Solutions 2007-2009

5.19 2008 Nomis data indicates that tourism related employment in the Borough stands at 1527 jobs, equating to 7.2 percent of the employee jobs in the Borough. The percentage places Rossendale in the bottom quartile of all the North West region local authority areas, and in actual numbers is the lowest in the North West. The Nomis data is generated from the Annual Business Inquiry (ABI) employee analysis. ABI defines tourism as a combination of the following Standard Industrial

Classifications:

SIC 551	Hotels
SIC 552	Camping sites and other short stay provision
SIC 553	Restaurants
SIC 554	Bars
SIC 633	Activities of travel agencies and tour operators
SIC 925	Library, museum and other cultural activities
SIC 926	Sporting activities
SIC 927	Other recreational activities

5.20 Analysis of this employment data for the past ten years shows relatively modest growth for most of the SICs. The exceptions are SIC 926, which has seen a six-fold growth of employment relating to sporting activities, and SIC 633, which has shrunk to less than one tenth of the 1998 figure. It is assumed this reflects the subsequent loss from the borough of Airtours. Since 2003 the underlying trend for the whole of the tourism sector is one of steady growth in employment numbers, despite some year to year peaks and troughs.

5.21 It should be noted there is a marked difference between the STEAM and ABI data. This relates not just to the totals, but what the global figures comprise. The ABI data reveals a figure almost 40 percent higher than the STEAM source, even though the latter includes indirect employment. There are also differences in the categories included in each data set. However where there appears to be consistency in the categories (accommodation, food and drink, recreation) there is little or no correlation between the respective figures.

Comparative Performance

5.22 By using data from the NWDA's 'Tourism Volume and Value – 2008' report (referenced in Section 3, paragraph 3.27 onwards) and the STEAM data for Rossendale held by the L&BTB, it is possible to draw some comparisons about performance at the regional, sub-regional and local (Rossendale) levels. This relates to the most recent available data (2008) and the percentage shares attributed to volume and value for visitor days and expenditure generated, as well as spend per trip.

5.23 The data comparisons reveal:

- Rossendale's visitor days total is very dependent on day visitors. The weakness of the accommodation offer is reflected by the fact that only 1.7 percent of the total visitor days were linked to the accommodation sector. The comparable figure for the Lancashire and Blackpool sub-region is 24 percent

- Visitor spend is Rossendale is also dominated by day visitors – the proportion (83.1 percent) is three quarters higher that the sub-region. Indeed, only 6.3 percent of Rossendale's visitor spend total is attributable to accommodation. This is one fifth of the North West average, and one eighth of the Lancashire and Blackpool area average
- Greater parity with regional and sub-regional averages in terms of spend per trip. Spend figures for serviced accommodation (£246) and day visitors (£27) align to those for Lancashire and Blackpool. Non-serviced accommodation spend is actually higher in Rossendale (£337 compared to £307 and £272 for the sub-region and region respectively). The average spend from the Staying with Friends or Relatives sector is lower in Rossendale, and this contributes to the 'all visitors' average spend per trip (£31) being around only 60 percent of the sub-regional,(£50) and 66 percent of the regional figure (£48)
- Rossendale's revenue per capita population is £998. By comparison the North West figure is £2123 and the sub-region £2143
- Although data is available to indicate annual incomes generated per bedspace at both the regional and sub-regional levels, in the absence of precise data on the number of bedspaces in Rossendale it is not possible to calculate an equivalent, and thus comparable figure
- The weakness of the accommodation sector directly impacts on the share contributed to tourism employment. The share in Rossendale, at 8.7 percent, is only just above half the North West figure (15.5 percent), and is less that one-third of that for Lancashire and Blackpool (26.5 percent). In contrast, Rossendale exhibits higher shares of employment associated with the retail and food and drink sectors. The combined share for these two sectors is 62.2 percent. For both the North West and the sub-region the share is 47.8 percent

Forecast Volume and Value

5.24 With the exception of GDP growth forecasts (2008-2020) included in the Borough Council's emerging Employment Land Review, there is a lack of forecast data beyond 2016. Consequently potential scenarios for the future scale of Rossendale's tourism sector look only to 2016 and are sourced from L&BTB's growth and annual performance targets for the sub-region; from the GDP growth projections for Rossendale's local economy (though these do not drill down to the tourism sector) and from NOMIS Annual Business Inquiry statistics.

5.25 Two differing baseline figures are used for the forecasts for future tourism sector employment. One source is the STEAM model annually commissioned by L&BTB, which provides an indicative base for monitoring trends through local level measurement from the supply side. This includes indirect as well as direct employment. NOMIS ABI data refers to employment numbers within specifically defined tourism activities. As such there is no inclusion of indirect employment.

5.26 Each forecast scenario shows the STEAM model data producing a lower jobs number than NOMIS ABI. The gap is exacerbated when indirect employment is added to the ABI data at the same ratio as exists with the STEAM data. The detailed calculations for each scenario are set out in the Economic Analysis report (Appendix 7 – Tables 14-17). Table 22 summarises the results.

Table 22 – Future Tourism Sector Employment – 2016
Summary of Alternative Scenarios

Scenario	STEAM (No. of Jobs)	Projection NOMIS ABI (No. of Jobs)	NOMIS ABI and Indirect (No. of Jobs)
L&BTB 40% Growth 2005-2016	1620	1760	2220
L&BTB Performance Targets Extended to 2016	1161	1613	2308
GDP Growth Forecasts to 2016	1246	1732	2186
NOMIS ABI Trend Data Projected to 2016	1422	1978	2497

Source: BE Group 2010

5.27 In addition, the trend from STEAM data for the Borough has been considered. However, this shows a relatively flat picture of tourism sector related jobs for the four years to 2008. Projecting forward the recent trend would suggest employment numbers would remain at around the 1100 figure through to 2016.

5.28 Forecasts of visitor numbers have been calculated using the L&BTB growth target of 41 percent by 2016 (based on 2005 figures) as well as their performance target, which has been projected forward to 2016. The former would see visitor numbers rise to 3.15 million – almost one million more than the latest figure for 2008. The second scenario would generate a figure of just over 2.5 million – an uplift of 393,000. Again, the detailed calculations are provided in the Economic Analysis report (Appendix 7 - paragraphs 3.10-3.13 and Table 18).

5.29 Forecast scenarios have examined the growth in value of the tourism sector to 2016. These consider the revenue in terms of spend per trip and per capita population. Table 23 summarises the results of the visitor spend scenarios set out in the Economic Analysis report (Appendix 7 - paragraphs 3.14-3.18 and Tables 19-20).

Table 23 – Visitor Spend Forecast to 2016

Scenario	Revenue/Spend £ millions		
	2008	2016	Variance
STEAM Trend 2006-2008 projected to 2016	67.17	74.05	+6.88
L&BTB Growth Target 2005-2016	67.17	82.80	+15.63
L&BTB Performance Target 2007-2013 projected to 2016	67.17	71.59	+4.42

Source: BE Group 2010

5.30 More dramatic increases in visitor spend are generated by scenarios that assume the Borough's average spend per trip, or revenue per capita population, is raised to align with either the regional or sub-regional level. Table 24 illustrates this could see spend raised respectively by £37-£74 million (based on the regional figure) or £41-£77 million (based on the sub-regional figure).

Table 24 – Rossendale Visitor Spend Forecasts.
Uplift to 2008 Regional and Sub Regional Averages Spend per Trip
Uplift to 2008 Regional and Sub Regional Averages Revenue per Capita, Population

Basis of Calculation (Visitor Numbers 2008 – 2,169,380 Population 67,300)	Forecast (£ millions)	Variance From Rossendale 2008 Baseline (£ millions)
Average Spend per Trip		
Rossendale @ £31	67.18	-
Lancashire and Blackpool @ £50	108.47	+41.29
North West @ £48	104.13	+36.95
Revenue per Capita Population		
Rossendale @ £998	67.18	-
Lancashire and Blackpool @ £2143	144.22	+77.04
North West @ £2123	142.88	+74.70

Source: BE Group 2010

5.31 If the L&BTB performance and growth targets are also factored in then this would see a more than doubling of the current value of Rossendale's tourism economy. It would take the 2008 figure of £67.17 millions up to between £153 and £174 millions.

Tourism Audit

5.32 This section comprises an audit of the tourism facilities in Rossendale. A full list of facilities and events is included in Appendix 1 and these are mapped in Appendix 4.

Accommodation

5.33 Table 25 is a schedule of the stock of serviced accommodation in Rossendale and Table 26 quantifies the available self-catering facilities.

Table 25 – Rossendale Serviced Accommodation

Accommodation	Tourist Board Rating	No. of Bedrooms	No. of Bed Spaces
Hotels			
Sykeside Country House Hotel and Restaurant, Haslingden	None	7	16
Bed and Breakfasts/Guest Houses			
Glen Valley Guesthouse, Waterfoot	4 Star	8	19
The Red Lion, Whitworth	3Star	3	8
Number 678, Whitewell Bottom	4 Star (Silver Award)	4	8
Horncliffe Mount Farm, Rawtenstall	4 Star	2	4
Middle Carr Farm, Rawtenstall	4 Star (Silver Award)	3	6
One 3 One, Rawtenstall	4 Star (Silver Award)	3	6
Peers Clough Farm, Lumb	3 Star	3	6
Glen Heights Guest House, Bacup	None	3	5
The Old White Horse, Goodshaw	4 Star (Silver Award)	4	6
Spout House Farm, Haslingden	None	3	5
Total	**-**	**43**	**89**

Source: BE Group/Rossendale Borough Council 2010

5.34 The majority of serviced accommodation comprises 4 Star Bed and Breakfasts/Guest Houses, with six bed spaces each. Rossendale has only one hotel (Sykeside Country House Hotel), which includes a function room.

5.35 Other function and conference facilities are available at The Riverside, Whitworth Civic Hall (capable of catering for up to 250 people), Do Dahs Cafe Wine Bar (capable of catering for up to 110 people) and St Mary's Chambers (capable of catering for up to 100), Rawtenstall.

Table 26 – Rossendale Self Catering Accommodation

Accommodation	Grading	Details	No. of Bed Spaces
Cottages			
Parrock Lumb Cottages, Bacup	3 Star	Three converted farm buildings (6-7 bed spaces each)	19
The Cottage, Cronkshaw Fold Farm, Helmshore	3 Star National Runner-up 2001 Silver Green Tourism Award, Chartermark – Cycling/Walking	Single Cottage	12
Oakenclough Farm, Bacup	3 Star	Converted farmhouse	8
The Old Stables, Tippett Farm, Cowpe	4 Star Chartermark – Cycling/Walking	Single Cottage	8
Hindle Pastures, Whitworth	4 Star	Single Cottage	6
Hardacres, Haslingden	None	Bungalow	4
Higher Tunstead Farm Cottage, Stacksteads	None	Single Cottage	4
Other			
The Shepherd's Shack, Cronkshaw Fold Farm	None	Bunk House	2
Total	**-**	**-**	**63**

Source: BE Group/Rossendale Borough Council 2010

5.36 Rossendale has approximately 89 serviced bed spaces, 61 self-catering bed spaces and two bunk house bed spaces. There is no youth hostel, caravan park or accredited campsite.

Visitor Attractions

5.37 Table 27 shows the range of visitor attractions. Sports related attractions, such as Ski Rossendale, are separately scheduled in Table 26 later in this section.

Table 27 – Rossendale Visitor Attractions

Attractions	Name	Entrance Fee	Opening	Facilities	Comment
Historic Houses/ Buildings	None				
Museums/ Heritage Centres	Helmshore Mills Textile Museum	Adult £4.00 Concession £3.00 Child free	12.00-4.00 seven days April-Oct	Museum, gift shop, café, demonstrations, events	Key local attraction. Awarded Best Small Visitor Attraction 2009/2010 by L&BTB
	Bacup Natural History Society/ Museum	Free	Thurs from 7.30(pm) 10.00-3.30 Easter Sat	Local history collection	Small museum, limited opening hours
	Rossendale Museum, Rawtenstall	Free	1.00-4.30 Sat-Sun, Tues-Thurs	Victorian mill owner's house, strong natural history collection, shop, gallery, events/ workshops	In Whitaker Park
	Weavers' Cottage, Rawtenstall	Free	1.00-5.00 Sat-Sun and Bank Holidays April-Sept	Heritage displays, shop, cafe	Managed by Rossendale Civic Trust
	Whitworth Heritage Museum	Free	7.30-9.30(pm) Tues, 2.00-4.00 Sat	Local history collection	Small museum, limited opening hours
	Lamberts Footwear Museum, Waterfoot	Free	10.00-6.00 Mon-Sat 10.00-4.00 Sun	Museum and shop	Linked to local footwear manufacturer
Key Historic Churches	Crawshawbooth Quaker Friends Meeting House	N/a	N/a		Built 1728 following passing of the Tolerance Act

Attractions	Name	Entrance Fee	Opening	Facilities	Comment
	Goodshaw Baptist Chapel	N/a	Once a year for Anniversary Service		Built 1760, Trustees handed Chapel to English Heritage and was fully restored opening in 1985
Animal/ Wildlife Attractions	Bleakholt Animal Sanctuary, Turn Village	N/a	N/a	School visits, café, events, company team building exercises	
Farm Attractions	Animal Quackers Farm, Bacup	Adult £2.50 Child £4.50 Family £12.00 Children's party £8.00 per child	11.00-3.00 Mon-Fri 11.00-5.00 Sat-Sun	Guided farm tours, children's parties, school visits, internal/external play areas, cafe	
	Cronkshaw Fold Farm, Helmshore	School Visits £3.80 per child Children's party £8.50 per child	9.30-5.00 Mon-Fri	Guided farm tours, environmental activities, children's parties, school visits, teacher training	For tour parties only
Gardens/ Urban Parks	Stubbylee Park, Bacup	Free	N/a	Gardens, glasshouse,	
	Victoria Park, Haslingden	Free	N/a	Gardens, bowling green, playground, skateboard park, ball court	
	Whitaker Park, Rawtenstall	Free	N/a	Gardens, playground	
Railway/ Transport Attractions	East Lancashire Railway, Rawtenstall	Standard fares (return): Adult £6.40-£12.20 Child £3.60-£8.20	Various, primarily weekends	Steam/ diesel train services, events, train experience days, school visits	Service runs Heywood to Rawtenstall Shop, café and other services at Bury Bolton Street Station Key local attraction, with plans for further expansion

Attractions	Name	Entrance Fee	Opening	Facilities	Comment
	The Rossendale Tour Buzz	Adult ticket £2.00 Child ticket £1.00 Family ticket £5.00	Thurs and Sun	Vintage tour bus taking visitors from the ELR to 14 local attractions, including Lee Quarry and the Halo Panopticon	New attraction started in July 2010. Private sector operated with a mix of private and public sector funding support. Pilot for Summer School Holidays 2010
Water Attractions	River Irwell	N/a	N/a	Irwell Sculpture Trail	Runs through Rawtenstall/ Bacup
	Local Reservoirs	N/a	N/a	Seven reservoirs in Grane Valley, Whitworth, Cowpe and New Line	See Sports and Outdoor Activities, Table 31.
Country Parks/Woodlands/ Other Landscape Attractions	Grane Valley/Clough Head Visitor Centre, Haslingden	Free	8.00-5.00 Seven Days	Visitor centre, café	
	'Halo' Panopticon, Haslingden	N/a	N/a		Sculpture on hill top
	Healey Dell Nature Reserve, Rochdale	Free	N/a	Interpretation Boards, woodland walks, school visits, other events	Partly in Rochdale
Craft Centres	None				
Other	The See Gallery, Crawshawbooth	Free	10.00-4.00 Except Thurs 10.00-9.00	Art Gallery with national exhibitions	
	The Fudge Village, Whitworth	Tours from £4.95 per person Children's party £9.99 per child	Various	Factory tours, children's parties, café, fudge shop and additional retail units	Fudge factory open to tour groups only.

Source: BE Group/Rossendale Borough Council 2010

5.38 Although there are gaps in certain areas, i.e. historic houses/buildings and craft centres, there is a reasonable museum/ heritage centre offer. The main attractions (Weavers Cottage, Helmshore Mills Textile Museum and the ELR) are all linked to industrial heritage. Other museums focus on local history and have limited opening hours. Cronkshaw Fold Farm and The Fudge Village Theatre Tour are open to tour groups only.

Retail

5.39 The Rossendale Retail and Town Centre Study, 2009 indicates that as of 2009 Rossendale had 13,436 sqm of net convenience retail floorspace and 18,027 sqm of net comparison space. This is focused in Rawtenstall Town Centre (109 A1/A2 shops), Bacup Town Centre (60 shops), and Haslingden Town Centre (63 shops). In the convenience sector Rossendale has two large supermarkets in Rawtenstall (Asda and Tesco) together with a Lidl store, and smaller Co-op supermarkets in Bacup, Waterfoot, Whitworth and Haslingden. The study concludes that there is no additional capacity needed for convenience retail in Rawtenstall, but Bacup may benefit from improving its convenience retail offer.

5.40 The comparison retail sector is limited and the majority of non-food shopping trips, made by local residents, are directed to facilities outside of Rossendale. Only for DIY/hardware shopping does the Borough retain a significant portion of the available local trade.

5.41 A modest number of independent shops can be linked to Rossendale's tourist economy (see Table 28).

Table 28 – Rossendale Visitor Retail Provision

Type	Name
Speciality Food	Fitzpatrick's Temperance Drinks, Rawtenstall
	Rileys Butchers, Crawshawbooth
Antiques/Arts/Crafts	Holden Wood Antiques and Decorative Arts Centre, Haslingden (35 arts/antique stalls and café)
Good Quality/Speciality Clothing	Butterworth Jones, Rawtenstall
	Bellusci Ladieswear, Rawtenstall
	Sunday Best, Rawtenstall
Factory/Mill Outlet	The Fudge Shop, Fudge Village, Whitworth
	HomeBrands @ Novaks (furniture), Rawtenstall
	Lambert Howarth's Mill Shop, Rawtenstall
	Musbury Fabrics Mill Shop, Helmshore
Outdoor/Leisure	Winfields, Haslingden (walking/camping clothes and equipment)
	Ride-On, Rawtenstall (bike shop, bike hire, bike tours)
Markets (Outdoor/Indoor/Speciality)	Haslingden Market (32 stalls, held Tuesdays and Fridays. Saturday Flea Market)
	Rawtenstall Market (40-70 stalls, held Thursdays and Saturdays)
	Bacup Market (60 stalls, held Wednesdays and Saturdays, Friday Flea Market)
	Rossendale Farmers' & Local Produce Market, Helmshore Textile Museum Car Park (30 plus stalls, held monthly)

Source: BE Group/Rossendale Borough Council 2010

5.42 Two additional firms (The Real Lancashire Black Pudding Company, Haslingden and Mawson's Traditional Drinks, Bacup) produce speciality food products for wholesale and internet retail.

5.43 Examination of retailer requirements included on the property database EGi would suggest almost 40 national retailers have expressed an interest in locating in Rossendale (primarily Rawtenstall and Haslingden). The range includes food supermarkets, cafes, clothing and financial services. However, this 'evidence of demand' should be treated with great circumspection as they include Primark and Waitrose. For most of the retailers Rawtenstall/Haslingden is one of a (often large) number of towns they could potentially consider for a new store.

5.44 Also, most of the retailers on the list sell local convenience/comparison goods (e.g. B&M Home Store). Only two of the requirements (those of J D Weatherspoon and Lloyds No. 1 Bar) would, if achieved, contribute to the Borough's tourist economy.

Food and Drink

5.45 Table 29 shows that Rossendale has a strong food offer, including a wide range of good quality restaurants and several award-winning pubs. Most towns have at least one café/tea shop as do several of the larger visitor attractions.

5.46 Table 29 only lists those food and drink venues which have been Quality Assured by Taste Lancashire and/or Taste International (or are awaiting grading). Other venues are likely to be of lower quality and orientated towards the local, rather than the tourist market. For this reason most takeaways and fast food restaurants are excluded.

Table 29 – Rossendale Food and Drink Provision

Type	Name	Food Served	Comment
Restaurants	Ashoka, Rawtenstall	5.00-12.00 Mon-Sat 3.00-12.00 Sun	Includes takeaway
	Bistro Fudge, Whitworth	Various (bookings recommended)	Part of Fudge Factory Coffee lounge and Sunday carvery In-house pianist
	Casa Tapas, Rawtenstall	5.30-10.30 Tues-Thurs 5.30-late Fri-Sat 4.30-9.30 Sun	Live music Fri-Sat
	Do Dahs Cafe Wine Bar, Rawtenstall	9.00-4.00 Mon-Thurs 9.00-5.00 Fri-Sat	Can cater for functions/conference of up to 110 delegates
	Istanbul Coffee & Kebab House, Rawtenstall	Not known	
	La Veranda, Haslingden	5.30-11.00 Wed-Sat 12.00-9.00 Sun	
	Mario's, Bacup	12.00-2.00, 5.30-11.00 Mon-Sat	
	Mirco's Ristorante Italiano, Whitworth	5.30-10.00 Tues-Sat 12.30-9.00 Sun	
	Nino's, Rawtenstall	Various	Live music
	Red Chilli Restaurant, Bacup	Not known	

Type	Name	Food Served	Comment
	Ridings Restaurant, Sykeside Country House Hotel, Rawtenstall	Open to non-residents 7.00-9.00 Thurs-Sat 12.00-2.00 Sun	Cater for parties of up to 60
	White Horse Bar & Restaurant, Helmshore	12.00-2.30, 5.30-9.30 Tues-Sun	Bar food and restaurant Function room
Cafes/tea shops	The Coffee Mill Café, Helmshore	12.00-4.00 daily (April-Oct)	Part of Helmshore Textile Museum
	Cafe Artisan, Rawtenstall	Various	Evening bar, live music and room hire
	Cafe Tor, Helmshore	9.00-5.00 Mon-Fri 9.00-4.30 Sat 10.00-4.00 Sun	Part of Musbury Fabrics
	Holden Wood Tea Rooms, Haslingden	8.30-5.00 daily	Part of Holden Wood Antiques
	Istanbul Coffee & Kebab House, Rawtenstall	Not known	
	Lizzie Lumbs Café, Shawforth	7.00-7.00 daily	
	Russian Tea Room, Bacup	7.30-5.30 Mon-Fri 9.00-5.00 Sat 10.00-5.00 Sun	
	The Bizzy Plaice, Edenfield	Various	Fish and chip café and take away
	The Corner Café, Crawshawbooth	Not known	
	The Deli, Rawtenstall	8.00-5.00 daily	
	The Old School Room Café, Haslingden	10.00-4.00 Mon-Fri	
	Victorian Tearooms, Haslingden	Not known	
Pubs	Farmer's Glory, Haslingden	Various	Caters for wedding parties
	Hargreaves Arms, Lumb	5.00-11.00 Mon-Sat All day Sun & B/H Light Lunches served 12.00-2.00 Wed-Fri	
	The Birches, Whitworth	12:00-11.30 Sun-Thu 12:00-01.30 Fri-Sat	
	The Fisherman's Retreat, Ramsbottom	12.00-9.00 Tues-Sun, Bank Holiday Mondays	Includes whisky shop and monthly whisky tasting nights Whisky Pub of the Year 2010, Good Pub Guide Fishing lake (members only)

Type	Name	Food Served	Comment
	The Holden Arms, Haslingden	12.00-9.00 daily	Marstons Pub of the Year (Newcomer of the Year) 2007 Live music
	The Red Lion Inn, Whitworth	Various	Bed and Breakfast Function room
	The Rose N Bowl, Stacksteads		Live music Bowling green

Source: BE Group/Rossendale Borough Council 2010

Events

5.47 Rossendale hosts a wide range of annual festivals (see Table 30), including a number of themed events on the ELR. There are a number of annual walking festivals, held both locally and across the West/South Pennine sub-regions. The Singletrack Weekender is a key sporting event, attracting 170 mountain bikers from across the UK. In 2009, it was voted the 15th best mountain bike event in the world by the International Mountain-bike Trade Team Organisation.

Table 30 – Rossendale Events

Event Type	Name	Time of Year	Attendance (where known)	Comment
Festivals	1940s Wartime Weekend, East Lancashire Railway, Rawtenstall	September, 1 weekend	70,000 (across all ELR events)	Special train services, memorabilia stalls, live entertainment, historical re-enactments, live music, period vehicle display, parade L&BTB Tourist Event of the Year (Winner 2010)
	Family Engines Big Day Out, East Lancashire Railway, Rawtenstall	October, 2 days	70,000 (across all ELR events)	Family themed railway event, special train services, children's events
	Santa Steam Specials, East Lancashire Railway, Rawtenstall	Nov-Dec, 1 month	70,000 (across all ELR events)	Special train services, food, children's events
	Teddy Bear's Picnic, East Lancashire Railway, Rawtenstall	August, 1 day	70,000 (across all ELR events)	Special train services, food, children's events
	Bacup Folk Festival	Varies	2000	
	Edenfield Bonfire & Fireworks	November, 1 day	-	Local Bonfire Night fireworks display

Event Type	Name	Time of Year	Attendance (where known)	Comment
	Heritage Open Days	September, 1 weekend (can vary)	-	Local heritage themed weekends. Last held at Helmshore Textile Museum, Sept 2009
	Horse + Bamboo's Puppet Festival, Horse + Bamboo Theatre, Waterfoot	Varies	500-1000	TBC
	Lancashire & North West Scythe Festival, RE-TURN Community Environmental Reserve, Turn Village	July, 1 weekend	-	Community open day Rural craft demonstrations, children's art workshops
	Marl Pits Firework Display, Marl Pits Sports Complex, Rawtenstall	January, 1 day	-	New year fireworks display
	Pennine Lancashire Festival of Food and Culture	Aug-Sept, 1 month	46,000 (across Pennine Lancashire)	60 events aimed at local food and culture, held across Pennine Lancashire Events in Rossendale have included the 'World Gravy Wrestling Championship and Family Fun Day'
	Rossendale Mela, New Hey Cricket Ground, Rawtenstall	August, 1 day	-	Multicultural festival with live music, crafts and food
	Singletrack Classic Weekender, Lee Quarry	July, 2 days	350 spectators, 170 participants (2009)	Mountain bike event Attracts participants from across the UK Voted 15th best mountain bike event in the world, for 2009, by the International Mountain-bike Trade Team Organisation See Interim Review of the 2009 Event (Section 3, pages 72-73, paragraphs 3.114-3.116)
	The Skeletons Ball	Not known	-	Not known
	Waterfoot Lancashire Day	September, 1 day	-	Live music, children's entertainments, craft and food stalls
	Whitworth New	January,	-	Sponsored rubber

Event Type	Name	Time of Year	Attendance (where known)	Comment
	Years Days Duck Race, Cowm Reservoir	1 day		duck race
Processions /Annual Walks	South Pennines Walk & Ride Festival	September, 2 weeks	-	Walking festival held across the South Pennines
	West Pennine Moors Walking Festival	July-Aug, 1 week	-	Walking festival held across the West Pennines
	Bacup Carnival	June, 1 day	-	Next to be held in 2010, last held 2004
	Britannia Coconutters Easter Dance, Bacup/Britannia/ Stacksteads	April, 1 day	2000	Annual procession by local folk dancers
	Rossendale Round the Hills Walk	September, 1 day	-	18 mile sponsored walk, starting in Stacksteads
	Rossendale Way in a Day	June, 1 day	-	46 mile endurance walk/run
	Rural Rossendale Walking Festival	October, 4 days	-	Multiple walks, including ‘food themed’ walks, advertising local produce
	The Waugh's Well Gathering Royal Hotel, Waterfoot	January, 1 day	-	4 mile walk, poetry reading
	Valley of Stone Walks Programme	Ongoing	-	Multiple themed walks
Fairs/ specialist markets	Bacup Art Market, Bacup Market	November, 2 days	-	Annual market, with stalls for artists from the North West (usually Lancashire/ Manchester)
	Edenfield & District Horticultural Shows	Aug-Sept, two 1 day shows	-	Plant sales, garden trail
	Rawtenstall Christmas Festival Weekend	December, 2 days	-	Christmas market, live music, children’s events
	Whitworth Rushcart	September, 1 day	-	Procession

Source: BE Group/Rossendale Borough Council 2010

Sports and Outdoor Activities

5.48 Rossendale has several significant outdoor sporting activities including Ski Rossendale, Cowm Leisure (motorsport), Whitworth Water Ski and Lee Quarry

Mountain Bike Centre (see Table 31). These form part of the Pennine Lancashire 'Adrenaline Gateway'. Rossendale also has a range of equestrian facilities and long distance bridleways/footpaths. However, indoor facilities are limited to local leisure centres.

Table 31– Rossendale Sports and Outdoor Activities

Sport/ Activity	Name	Details
Leisure Centre/ Indoor Pool	Haslingden Sports Centre	Run by Rossendale Leisure Trust Gym, aerobics centre, indoor sports hall
	Haslingden Swimming Pool	Run by Rossendale Leisure Trust
	Marl Pits Pool & Sports Complex, Rawtenstall	Run by Rossendale Leisure Trust
	Bacup Leisure Hall	Run by Rossendale Leisure Trust Squash/Badminton court, Theatre RLT are in negotiations with other operators to transfer facilities. If no operator secured the facility will close in early Autumn 2010
	Whitworth Community Sports Centre	Run by Rossendale Leisure Trust Whitworth Community High School sports hall and gym, open to the public in evenings
	Whitworth High Leisure Centre	Pool, fitness centre, conference/function facility
	Alder Grange, Rawtenstall	Run by Rossendale Leisure Trust Alder Grange Community and Technology School sports hall and gym, open to the public in evenings
Golf	Lobden Golf Club, Whitworth	18 hole, members only
	Rossendale Golf Club, Haslingden	18 hole, members only Pro shop, club house (open to non-members)
	Bacup Golf Club, Bacup	9 hole, open to non-members
Long Distance/ Themed Footpaths	Irwell Sculpture Trail	33 mile trail from Bacup to Salford. In the process of being redeveloped as a series of circular walks or clusters.
	Rossendale Way	43 mile boundary walk around Rossendale. On OS Maps OL21 and 287.
	Rossendale Shoe Trail	Heritage trail
	Landgate and Moss Quarry	Includes Rossendale Trampers, trails for the disabled
	Mary Towneley Loop	Sub-regional bridleway/footpath, passing through Rossendale
	The Pennine Bridleway	Sub-regional bridleway/cycleway/footpath, passing through Rossendale
Other Walks	Numerous	

Sport/ Activity	Name	Details
Cycle Routes/ Mountain Bike Trails	Lee Quarry Mountain Bike Centre, Bacup	5 mile mountain bike trail
	The Pennine Bridleway	Sub-regional bridleway/cycleway/footpath, passing through Rossendale
Riding	Dam Top Riding Centre, Rawtenstall	Riding school, stables, self catering accommodation, horse tours
	Peers Clough Packhorses, Lumb	Horse tours/holidays, guest house, stables
	Croft Top Farm, Stonefold Village, Rising Bridge	Stables, dressage training and events
	Forest of Rossendale Bridle Association	Sub-regional equestrian association, running monthly rides, dressage, training, events
	Mary Towneley Loop	Sub-regional bridleway/footpath, passing through Rossendale
	The Pennine Bridleway	Sub-regional bridleway/cycleway/footpath, passing through Rossendale
Skiing	Ski Rossendale, Rawtenstall	Presently run by Rossendale Leisure Trust (new investor/operator sought) Dry ski slope, ski lessons, parties
Fishing	Loveclough Trout Fishery, Loveclough	Day tickets available
	Cowpe Fly Club, Cowpe Reservoir, Cowpe	Members only
Sailing/ Other Water Sports	Whitworth Water Ski Centre, Cowm Quarry, Whitworth	Ski centre, instructor, pro shop, clubhouse, residential facilities
	Rossendale Valley Sailing Club, Clowbridge	Club and part of reservoir in Burnley
Motorsports	Cowm Leisure, Cowm Quarry, Whitworth	Trails for trials bikes, 4 x 4's, pit bikes and remote controlled cars. Regular events/competitions
Other Sports	Rossendale RUFC, Rawtenstall	Rugby ground, shop and club house (available for functions)
	Rossendale United Football Club, Rawtenstall	Football ground, shop and club house (available for functions)
	Perform Centre, Waterfoot	Professional athlete training centre

Source: BE Group/Rossendale Borough Council 2010

Entertainments

5.49 As Table 32 shows, entertainments in Rossendale are largely limited to three local theatres. The Borough Council has been piloting mainstream cinema films aimed at achieving community engagement with families. Three events have been held over the last 12 months at the Royal Court Theatre in Bacup. One more is planned.

Funding for these was secured from Regenerate East Lancashire. Attendance has averaged around 70 people. In addition, a community group has been holding film screenings at Bacup Leisure Hall. These have attracted audiences of around 150 people. The nearest dedicated cinema complexes, bingo halls, etc, are found in Accrington, Burnley, Bury and Rochdale.

Table 32 – Rossendale Entertainments

Sport/Activity	Name	Details
Theatre	Horse + Bamboo Theatre, Horse + Bamboo Centre, Waterfoot	Local theatre and arts centre, including craft studio
	Millennium Theatre, Waterfoot	Local theatre
	Royal Court Theatre, Bacup	Local theatre Run by Bacup Amateur Operatic and Dramatic Society
Cinema	Royal Court Theatre, Bacup	Theatre has been used by RBC to screen mainstream films, aimed at families
	Bacup Leisure Hall	Community group screening films aimed at families
Ten Pin Bowling	None	
Bingo	None	
Laser Quest	None	

Source: BE Group/Rossendale Borough Council 2010

Proposed Developments

5.50 Rossendale is in a period of transition. Important developments are planned or underway which will strengthen the visitor offer and particularly the range of accommodation available. Proposals include a range of public sector investments, which focus on the improvement and expansion of Rossendale's footpaths and bridleways (see Table 33). Public agencies also propose a number of new festivals and marketing activities which are discussed in Table 34. Where relevant, new opportunities are recorded in Appendix 1 (Venue and Event Database - labelled A-F) and on the maps in Appendix 4 (labelled A-F).

Table 33 – Rossendale Public Sector Development Proposals

Venue	Details	Timescale (where known)	Funding Partners
Swinnel and Ogden Brook, Holcombe Road, Haslingden	Development of a bridleway following the path of the former Helmshore to Ramsbottom Railway, with links to the Irwell Sculpture Trail and National Cycle Path NCN6.	Detailed design completed, construction expected in 2011	REMADE in Lancashire
Irwell Sculpture Trail	Improved marketing, signage and interpretation boards. Additional links to Lumb Mill, Halo Panopticon and proposed Whitworth Sculpture Trail (below)	Completion in 2011	Arts Council, RBC, Lancashire County Council,, Salford City Council, Bury Metropolitan Borough Council
Lumb Mill, Irwell Vale	2300 metre extension to an existing bridleway (part of National Cycle Path NCN6), between Iron Gate Lane and Stubbins, with links to the West Pennine Moors and the Irwell Sculpture Trail	Construction underway (nearing completion)	REMADE in Lancashire
Whitworth Sculpture Trail, Whitworth	Four mile sculpture trail through Whitworth, following an existing cycle path, with links to the Irwell Sculpture Trail	Feasibility study underway Funding and timescale to be determined.	Whitworth Town Council (other partners to be determined)
Strategic Signage Improvements	Five strategic signs, listing major visitor attractions, to be placed on key arterial routes. To be supplemented by additional directional signage, map signs at town centre locations and new signage for the Rossendale Way	Strategic signs to be completed by Sept 2010. Completion of all signage by March 2012	RBC, LCC
Woodlands Improvement Project	Improvements to six Lancashire County Council owned woodlands including improved access, signage and interpretation facilities	Management plan and funding bid under development. Full timescale to be determined	Lancashire County Council (other partners to be determined)

Source: BE Group 2010

Table 34 – Rossendale Future Festivals/Marketing Activities

Event	Details	Timescale (where known)	Funding Partners
Perspectives of Pennine Lancashire, 2010 festivals	Three festivals for the visual arts, to be held across Pennine Lancashire and linked to the Pennine Lancashire Food Festival. May include temporary art/sculpture exhibitions	August-September 2010 Spring 2011 Late Summer 2011	Arts Council, Creativity Works, Renaissance North West, Lancashire County Council
'Inspire Me'	A range of themed package holidays involving local attractions and accommodation	A pilot project (Mountain Biking Package) will shortly be submitted for L&BTB funding	L&BTB (tbc), RBC, private partners
Other marketing activities	• New Visit Rossendale website • Expanded Visitor Guide • 'Foodie' restaurant/café destination map • 'Two for £10' restaurant marketing campaign, offering meal deals	New website now complete as is Visitor Guide	Primarily RBC and private partners

Source: BE Group 2010

Sunnyside Works/Albert Mill, Whitworth

5.51 Sunnyside Works and Albert Mill (table reference A, Appendix 1/map reference A, Whitworth Map, Appendix 4) are two historic mill properties that have been derelict for several years. The private owners now propose a mixed-use refurbishment/partial redevelopment, to include: a 50-60 bedroom budget/moderate quality hotel, pub/restaurant, cycle shop, café, 7-9 ('boutique style') retail units, offices and 3-4 bed family homes. The scheme will provide pedestrian links to Healey Dell Nature Reserve. A hotel at this location would provide opportunity to develop business tourism, through links with the adjacent Riverside Conference Centre.

5.52 The owners advise that there is good commercial support for this project, with confirmed interest from three national hotel operators and two pub/restaurant operators. There have been 20 enquiries by local independent retailers (primarily hairdressers, beauticians and cafes) for the retail units.

5.53 The owners have completed pre-application discussions with RBC and are now developing detailed plans. A planning application is to be submitted shortly. The development is expected to be completed in 2012-14.

Water Equestrian Centre, Water

5.54 An existing farm and stables (table reference B, Appendix 1/map reference B, Rising Bridge, Loveclough, Crawshawbooth and Water Map, Appendix 4) the Water Equestrian Centre submitted a planning application for a 5-6 bed dormitory facility and additional stabling. This would provide accommodation for riders and cyclists using both the Mary Towneley Loop and Pennine Bridleway. The initial application was refused as being too large for its rural setting and Water Equestrian Centre are now considering a revised scheme.

Golf Rossendale Driving Range and Academy, Rawtenstall

5.55 A planning application for a 32 bay golf driving range and academy is currently under consideration by RBC (table reference C, Appendix 1/map reference C, Haslingden and Helmshore Map, Appendix 4). The academy would include a small putting green and have a former PGA professional golfer on staff to teach courses. Planning permission has been secured and the scheme could by completed by October 2010.

Greenbridge Works, Rawtenstall

5.56 Regenerate Pennine Lancashire has been reviewing the long-term use of the Grade II listed Greenbridge Works. It was included as a case study for the Pennine Lancashire Mills Conference in May this year. Architects, Buttress Fuller Alsop Williams considered how the mill could be refurbished to maximise the use of all available space. Three options have been developed:

- Option One: Hotel (2287 sqm), Function Room, Restaurant, Shoe Museum (494 sqm) and Offices
- Option Two: Hotel (2287 sqm), Conference Room, Restaurant, Café, Bar, Shoe Museum (768 sqm) and Offices
- Option Three: Hotel (1156 sqm), Community Centre (896 sqm), Café, Bar, site for Indoor Adrenaline Sports Centre (2725 sqm) and Offices.

5.57 Although there are no plans to deliver these options in the short term, it is hoped they will guide future change.

Adrenaline Gateway

5.58 The Adrenaline Gateway in Rossendale is focused around Lee Quarry (in Bacup) and Cragg Quarry (Waterfoot) which provide a range of expert (red/black) level mountain bike trails. Plans to expand this attraction include the development of links (via Facit Quarry) to the Pennine Bridleway. This will create a long distance cycle trail linking Lee/Cragg Quarries with Gisburn Forest, Ribble Valley and other cycling facilities along the route.

5.59 LCDL will also shortly be commissioning a feasibility study for an indoor extreme sports facility. The detailed design of this sports facility is to be determined, but it may include indoor and outdoor climbing facilities, rope courses, ice climbing wall, children's snow playroom and ice bar (the first in northern England). The facility will support the existing mountain bike trails by providing changing rooms/showers and a bike wash. Ancillary uses would include retail outlets, office space for marketing and administration, café and toilets.

5.60 Plot Four, Futures Park Business Centre, Bacup is the preferred location for this facility. Timescales and funding options will be developed in the feasibility study.

East Lancashire Railway, Rawtenstall

5.61 The development priorities of the ELR Trust are discussed in more detail, in Section 3. In the short term, plans will focus on improving signage, lighting and walkways between the station and Rawtenstall Town Centre (along with a café extension and other improvements in the station itself). Over the long term, the ELR Trust will work with the Borough Council to develop common plans for the improvement of Rawtenstall Town Centre while Stubbins Halt will also be investigated as a further development opportunity.

5.62 The option of using the ELR to provide commercial rail services (along with other commercial rail opportunities) is discussed in Sections 2 and 6.

Future Opportunities

5.63 Stakeholder consultations have highlighted a number of additional proposals which private and public sector agencies hope to deliver during the period to 2027. However, all remain aspirational at this time – lacking the funding, developer backing, or public sector support to guarantee development.

5.64 Also, the plans of individual investors are constantly changing, with new proposals emerging and existing schemes being discarded. This section therefore provides a point in time analysis, illustrating how Rossendale's tourism offer is likely to develop in the future rather than providing an exhaustive list of all proposals. Table 35 identifies the private sector proposals while Table 36 reviews public sector investment.

Table 35 – Rossendale Private Sector Proposals

Venue	Details	Issues
The Fisherman's Retreat Restaurant, Riding Head Lane, Shuttleworth (table reference D, Appendix 1/map reference D, Edenfield Map, Appendix 4)	Self-catering accommodation (log cabins) adjacent to existing restaurant	Aspiration only, details to be determined
Winfields Megastore, Mill Street, Haslingden (table reference E, Appendix 1/map reference E, Rising Bridge, Loveclough, Crawshawbooth and Water Map, Appendix 4)	Aspiration to develop a motorbike museum and additional retail space	Hold a collection of more than 100 classic motorbikes in storage Aspiration only, details to be determined
Camping site	Interest from at least one private individual to develop a campsite	Aspiration only, details to be determined

Source: BE Group 2010

Table 36 – Rossendale Public Sector Proposals

Venue	Details	Issues
New Hall Hey/Valley Centre Public Realm Scheme, Rawtenstall (table reference F, Appendix 1/map reference F, Rawtenstall Map, Appendix 4)	Enhanced riverside walk at the junction of the Irwell and Limey Water Rivers. Improved public realm and pedestrian links to Rawtenstall ELR Station, Rawtenstall Town Centre and Rawtenstall Market	Concept plans developed by Groundwork Pennine Lancashire Funding could only be provided as part of a wider redevelopment of the Valley Centre (see below)
Public realm improvements, Haslingden Town Centre and the Halo Panopticon	Improved pedestrian links and signage between Haslingden Town Centre and the Halo Panopticon	Funding secured to develop the concept
Bacup public realm improvements	Improved public realm and signage in Bacup Town Centre	Plan developed

Source: BE Group 2010

5.65 In the long term, tourism development in Rossendale will continue to focus on the provision of accommodation, while public sector investment will focus on public realm improvements. Although two additional visitor attractions (motorbike and military museums) are proposed, both would be dependant on securing private sector investment and support. Investors have shown no interest in these projects to date.

5.66 An additional future opportunity will be the refurbishment or redevelopment of the Valley Centre, Rawtenstall. This major gateway site into Rawtenstall has been vacant for several years and is in danger of becoming derelict. Stakeholders regularly identify it as a blight on the local environment.

5.67 Initial proposals suggested the Centre could be redeveloped for a mixed use, retail, apartment and office scheme which was granted planning permission subject to a Section 106 Agreement. However, the Centre is owned by a holding company that has shown no interest in delivering such a project.

5.68 The Borough Council are now undertaking a number of short term measures to reduce the visual impact of the Centre, including serving the owners with a Section 215 Notice (requiring maintenance and improvement) and screening the centre from view. A Rawtenstall Town Centre masterplan will also consider how the site could be re-used in the long term. The Borough Council is also considering using its powers to compulsory purchase the site.

Benefits and Challenges of Tourism

5.69 Without doubt, tourism can benefit Rossendale's local economy and many sectors of its community. However, it should be recognised tourism may also bring potential challenges that require strategies to be developed to address them. The following two tables (Tables 37 and 38) describe the benefits and challenges. Each table comprises breakdowns associated with economic, social/cultural and environmental aspects. It should be noted that some benefits or challenges are applicable to more than one of these three aspects. Indeed some impact across all.

Table 37 – Tourism Benefits

Economic	Social/Cultural	Environmental
Protects and provides an income source for the built and natural heritage		
Significant catalyst for economic growth and employment Helps increase demand for other non-tourism businesses	Leads to the creation and maintenance of local amenities	Draws attention to the need to protect the natural environment Encourages more rigorous analysis of the importance of the local eco-system
Draws in expenditure from external sources into the local economy	Supports events, arts, sports and other culture	
	Helps build distinctive communities, generating local pride/self confidence	
	Provides opportunities for social inclusion	
	Encourages cultural diversity	
Supports and helps to maintain local services		
Provides re-skilling, training and employment opportunities		
Encourages residents to stay and spend leisure time		
Encourages improvement and re-use of derelict land and buildings		

Source: BE Group 2010

Table 38 – Tourism Challenges

Economic	Social/Cultural	Environmental
As a diverse sector, co-ordination is both complex and a continuing need		
Tourism spend depends on economic and social factors which can reduce numbers and spending power		Puts strain on transport infrastructure (e.g. roads, parking) & utilities infrastructure
Economic downturn impacts on local business in the short/medium term	Labour market implications associated with unsocial hours, seasonal/part time work	Extra pressure on sensitive local environments and thus requires effective visitor management
Some demand can be seasonal and variable over a weekly cycle, which impacts particularly on employment		
Needs all-weather facilities and activities		
Very competitive and increasingly sophisticated		
Requires ongoing public sector investment		

Source: BE Group 2010

Summary

5.70 In addition to producing statistical benefits to the local economy, justification of the argument to support tourism should have regard to the economic, social/cultural and environment benefits to Rossendale's communities. However, there may also be potential challenges which require strategies and/or policy to be developed to address them.

5.71 The geography and topography of Rossendale strongly influence the tourism offer. Proximity to the urban conurbations of Manchester and Central Lancashire delivers a substantial catchment. Topography contributes to the content of the offer, acknowledged by the inclusion of the Regenerate Pennine Lancashire 'Adrenaline Gateway' amongst the transformational projects identified within the Core Strategy. Evidencing this opportunity is the Lee Quarry/Cragg Quarry mountain biking facility near Bacup. The Shoe Trail, Irwell Sculpture Trail, Mary Towneley Loop, Rossendale Way, Pennine Bridleway and Cowm Reservoir provide further contributions to attracting active tourism.

5.72 Importantly tourism is not constrained to a specific part of Rossendale. It is a borough-wide resource and opportunity. As the LDF Core Strategy indicates the sector already touches, and has potential for further development in, all of the Borough's six geographic sub-areas.

5.73 There is a lack of data about Rossendale, whether this is the economic contribution of the industry, occupancy rates, visitor numbers or tourists' views. This reflects one of the findings of the Planning for Tourism & Visitor Economy in the North West (2008) (NWDA) report. Available data indicates Rossendale experiences a lower percentage of overnight visitors than the regional and national experience. Perhaps reflecting the limited serviced accommodation offer available, Rossendale's overnight stays are markedly different in the strong emphasis on the Staying with Friends or Relatives sector.

5.74 Overnight visitors generate a higher proportional spend than day-trippers. The most significant proportional growth in recent years (in both visitor numbers and spending) has been for non-serviced accommodation i.e. self-catering cottages.

5.75 STEAM Volume and Value Data commissioned by L&BTB highlights the importance of retail and catering, which accounted for 53 percent of total spend. A quarter of spending was indirect, benefiting local producers, wholesalers and service providers. Across Rossendale, 1098 jobs are (directly or indirectly) dependent on tourism – although Nomis data suggests a figure of 1527.

5.76 Comparison of the data with sub-regional and regional figures highlights the substantially greater dependence in Rossendale on day visitors and the weakness of its accommodation sector in contributing to visitor spend. The overall average spend per trip, at £31, is significantly less than the North West (£48) and sub-region (£50). This is also the case for revenue generated per capita population. For Rossendale the figure is £998, whilst the North West is £2123 and the sub-region is even higher at £2143.

5.77 Applying current sub-regional identified growth targets to the volume and Value data suggests that the average spend per trip in Rossendale would rise to £37 in 2016; visitor numbers would increase by almost a million to 3.15 million in 2016; total visitor spend would achieve an additional £48.7 million and visitors jobs would be boosted to 1620 jobs by 2016.

5.78 The tourism audit shows that Rossendale has a strong food offer and a wide range of outdoor and sporting activities. Visitor attractions focus on local heritage. Annual events are also themed towards walking or heritage.

5.79 Only a small number of shops are marketed towards visitors, while the Borough lacks major entertainment venues such as cinemas. Most accommodation is non-serviced (primarily self-catering cottages).

5.80 A number of developments are proposed, which will impact on the future tourism offer of Rossendale. Most significant are plans for additional visitor accommodation which would, if delivered, provide at least one budget/moderate quality hotel and a range of self catering options. Of the existing visitor attractions, the Adrenaline Gateway (Lee Quarry/Cragg Quarry) has the most significant plans for expansion, including the option of an indoor extreme sports venue with facilities that would be unique in Northern England. Other public investment will focus on additional walking/cycling/horse riding trails and public realm improvements.

6.0 CONSULTATIONS

Introduction

6.1 Stakeholder consultation has formed a key part of the study process. It has allowed a better understanding of the direct and indirect benefits of tourism in Rossendale and helped to identify proposed new attractions. It has also informed the conclusion and recommendation sections, helping to identify the key issues which planning policy has to address.

Methodology

6.2 The aim of the consultation process has been to engage with the full range of community, voluntary, business and public agency representatives that have a role in the Rossendale visitor economy. Consultation has involved the following:

- Tourism Business Survey – March/April 2010
- Stakeholder Workshop – 19th April 2010
- Public sector stakeholder consultation – April/May 2010
- Review of proposed tourism attractions – April/May 2010.

Tourism Business Survey

6.3 A business survey was carried out to gather empirical evidence about the scale of tourism in Rossendale and the direct and indirect benefits it brings. It sought to gain views on the attractiveness of the Borough as a tourist destination and identify any gaps in the visitor offer.

6.4 A questionnaire (included in Appendix 2), with explanatory covering letter was originally emailed or posted to 133 businesses. However, subsequent discussions identified that a number of tourist businesses or annual events are under common ownership. Thus only 106 individuals or organisations were ultimately surveyed. The range of responses is discussed in Appendix 5.

6.5 For clarity, all the organisations surveyed are referred to as ‘businesses’ in this study, although some attractions and events are run by volunteers on a not-for-profit basis.

Stakeholder Workshop

6.6 RBC officers and BE Group staff held a stakeholder workshop at Futures Park, Bacup on 19th April 2010. The 106 tourist business identified in the business survey were invited, as were a further 22 public sector stakeholders from local, county and regional agencies. The event was attended by 22 individuals, who were divided into five groups, and invited to discuss both the present strengths and weaknesses of tourism in Rossendale, and the future opportunities and threats.

Public Sector Stakeholder Consultation/Review of Proposed Tourism Attractions

6.7 Discussions were held with 27 public sector stakeholders, by telephone or face-to-face interview. These include representatives from Rossendale Borough Council, Lancashire County Council, Mid Pennine Arts, Regenerate Pennine Lancashire, the Lancashire and Blackpool Tourist Board and Business Link North West.

6.8 Discussions were also held with 11 public and private organisations, which have development proposals with the potential to enhance Rossendale's tourism offer. Details of proposed new developments are listed in Section 5.

Tourism Business Survey Analysis

6.9 This section provides a summary analysis of the business survey. The full results of the survey are included in Appendix 5. With support from the Borough Council's Town Centre and Tourism Manager, a 46 percent rate was achieved.

Employment

6.10 The businesses surveyed employ 267 people (133 full time and 134 part time). The findings confirm that most tourist business in Rossendale are micro businesses, employing less than ten staff.

6.11 However, the majority of people who work at Rossendale's visitor attractions are volunteers. The 19 visitor attractions surveyed employ 598 volunteer workers, most at the East Lancashire Railway (400 volunteers) and Millennium Theatre (90 volunteers). Six attractions and events (Millennium Theatre, Cowm Leisure, Crawshawbooth Quaker Friends Meeting House, Whitworth Heritage Museum and Britannia Coconut Dancers) are run by volunteers only.

Opening Hours

6.12 Businesses are generally open seven days, all year. The exception is the retailers, who all close on Sundays. Helmshore Textile Museum is the only attraction which closes for the winter season (November to March). The East Lancashire Railway runs services throughout the year, mostly on weekends with varying weekday services across the April-Sept period.

Tourist Board Rating

6.13 The quality of B&B/guest house accommodation in Rossendale is generally good. Nine B&Bs/guest houses are graded 4* (two with Silver Award) and three are graded 3*. Only one is ungraded, as is the Sykeside Country House Hotel, Haslingden.

Visitor/Guest Numbers

6.14 The questionnaire returns would suggest that there is a lack of detailed monitoring of visitor numbers. Most businesses could only estimate the number of visitors or customers attracted. Even larger attractions, such as Helmshore Textile Museum, appear not to record visitor numbers in detail.

6.15 One exception is Ski Rossendale, which has recorded visitor numbers for the 2006-2008 period (with projected figures for 2009). Visitor numbers to this attraction have decreased by around 15 percent (30 percent if the 2009 projection is correct), over the last few years.

6.16 The 49 businesses collectively estimate they receive 759,000 visitors/customers a year. Half of this number (383,000) is generated by the attractions. By far the most popular attraction is the East Lancashire Railway, accounting for 14 percent of all visitors. However, this figure relates to users along the whole length of the line. There is no data on the number of visitors accessing Rawtenstall Station as part of their journey.

6.17 Six restaurants/cafes provided visitor number estimates. The figures suggest a total of 365,000 visitors per year, on a par with the number visiting the borough’s attractions. Estimates from the individual businesses range from 4,000 to 250,000.

6.18 Fourteen accommodation providers responded. Together they attracted only 9000 overnight visitors (for one or more nights). This is partly explained by the type of accommodation available. Most comprises 2-4 bed B&Bs/guest houses attracting less than 400 guests annually. Only three venues have stated they attract more than 1000 guests a year.

6.19 Occupancy rates are generally equally distributed between either 50 percent or 70 percent. This difference is not linked to the accommodation quality, as different grades of property exhibit similar splits in their rates.

6.20 Only two events provided data on visitor numbers. The Pennine Festival of Food and Culture attracted 46,000 visitors in 2009, to events across Pennine Lancashire. However, breakdown to district level data is not available. The Bacup Folk Festival attracts around 2000 visitors a year. None of the tourism-orientated retailers could estimate the number of customers they received.

Change in Trade/Visitor Numbers

6.21 Businesses have a broadly positive view about how trade or visitor numbers have changed over the last three years. Overall, 43 percent feel that trade/visitor numbers have increased, while a third feel they have remained static. Only 24 percent feel they have decreased.

Reasons for Increase/Decrease

6.22 Where businesses indicated that trade/visitor numbers had increased, the majority credited service improvements to their individual businesses for any increases. None noted that improvements in the wider Borough (e.g. an improved town centre retail offer, better public transport or improvements in the physical environment) had helped to increase trade/visitor numbers. The recession and strong competition amongst local B&Bs/guest houses are the most commonly stated reasons for any decrease in trade/visitor numbers.

Average Spending

6.23 Table 39 shows the average visitor spend in Rossendale, compared to regional averages (where known). Average spending figures are not available for Lancashire.

Table 39 – Rossendale Visitor Spending (£, Per Person, Per Day/Night)

Business Type	Rossendale, Range (£)	Rossendale, Average (£)	North West, Average(£)
Attractions	3.50-25.00	10.57	8.66
Restaurants/Cafes	10.00-30.00	22.50	13.79
Accommodation	Hotel (moderate) - 60.00 Guest house - 30.00-60.00 Self-Catering - 17.00-89.00	Hotel (moderate) - 60.00 Guest house - 43.71 Self-Catering - 62.00	Hotel (moderate) - 50.00 Guest house - 26.00 Self-Catering - 26.00
Shops	200-3000	-	76.15
Events	39.00	39.00	-

Source: BE Group 2010/NWDA 2008

6.24 Comparisons between the business survey results and regional figures must be treated cautiously. North West figures are only available for 2008 and cover a far larger range of businesses (with greater variation in quality, pricing structures, etc). The accuracy of spending averages given by Rossendale businesses is also not clear.

6.25 However, the questionnaire survey suggests that in all cases average spending in Rossendale is well above regional levels. In particular, average spending on food and self-catering accommodation is more than double that of the wider North West. This suggests Rossendale's existing food, and accommodation offer is broadly above the regional average.

6.26 There is significant variation in the range of spend reported by the attractions. The high end spend is the East Lancashire Railway. Cowm Leisure averages £10 per person, while the two theatres (Millennium and Horse and Bamboo) generate spending around £8 per person, measured through adult ticket sales. Individual visitors spend around £6 at Helmshore Textile Museum.

6.27 Although Rossendale contains a number of free attractions (Lee Quarry, Halo Panopticon, parks, long distance walks, public art, etc.) most of the highest attended attractions, are paid attractions, generating direct revenue.

6.28 Non-serviced accommodation exhibits the greatest range of average spend. This reflects the variation in quality available, which ranges from 4* luxury lodges to bunk barn style accommodation for walkers and riders.

6.29 Two retailers, both clothing shops, estimated spending. Both gave wide spending ranges (from £200-£3000) that cannot be compared to regional averages.

6.30 Regenerate Pennine Lancashire estimate that the average visitor spend at the Pennine Lancashire Festival of Food and Culture is £39.

Promotion

6.31 Most venues/event managers use their own websites (or the Visit Rossendale website) as the primary method of promotion. This is usually combined with newspaper/magazine advertisements (in local newspapers and the Visit Rossendale guidebook).

Planned Expansions

6.32 19 respondents intend to expand or improve their business in 2010/11. 11 of these intend to make service improvements to their business (e.g. by offering new menus, changing their opening hours or selling a wider range of goods). Eight propose capital investments, primarily the extension of existing premises. All the businesses proposing physical alterations would like grant assistance to help fund changes.

Visitor/Customer Base

6.33 The majority of customers for the cafes/restaurants and shops come from Rossendale. Those staying overnight in Rossendale generally come from outside the North West, mostly from Yorkshire and Humber or elsewhere the UK. 20-30 percent comes from international destinations.

6.34 The visitor base for local attractions varies. Local parks, churches and theatres attract almost all their visitors from Rossendale, while sporting attractions (such as Cowm Leisure) attract visitors from across Lancashire. Major attractions, such as Helmshore Textile Museum, attract most of their visitors from the wider North West or elsewhere in the UK. Around 10 percent come from overseas.

Method of Transportation

6.35 The majority of visitors (more than 80 percent) arrive by car. Only the local attractions, such as the parks or Rossendale Museum, experience substantial foot traffic. Several attractions, such as Cronkshaw Fold Farm and Study Centre, also provide educational facilities which are used by coach parties.

The Attractions of Rossendale

6.36 Outdoor activities (notably walking and cycling), the ELR and Helmshore Textile Museum are identified as the major visitor attractions.

6.37 Business trips are also seen as a strong element of the visitor economy. Several accommodation providers commented that business travellers to Greater Manchester will frequently stay in Rossendale because of the cheaper accommodation and attractive rural environment.

6.38 35 percent of respondents indicated that local events benefit their businesses. Key events include antiques fairs, Helmshore Farmers Market, trade events, and folk events involving the Coconut Dancers. Events organised by the ELR do not significantly benefit Rossendale. Most of the visitors using the ELR will only travel from Bury to Ramsbottom, and do not continue to Rawtenstall Station.

Rossendale

6.39 Respondents commented on the good and bad features of Rossendale. The good features include the landscape and range of outdoor activities available (e.g. walking) along with the borough's industrial heritage.

6.40 There is concern about the quality of retail centres, notably Rawtenstall Town Centre and the Valley Centre. Public transport is seen as poor and there is a lack of available car parking. It is considered more could be done to advertise tourist attractions; provide printed material, web information and road signage.

6.41 Other gaps in the visitor offer are for a caravan and camping site, good quality restaurants and hotels, and services such as public toilets (some of these are addressed by the development proposals outlined in Section 5). The limited variety of shops, and the lack of national multiples, was also commented on.

6.42 Accessibility could be improved through provision of a commuter rail link to Manchester. Extension of the Metrolink into Rossendale was also suggested. On a smaller scale, more parking and more regular weekend bus services would help visitors to better access local attractions.

6.43 Respondents suggested a wide range of actions to increase visitor numbers. These include:

- More specialist markets and food festivals
- Better use of industrial heritage, including bus tours of heritage sites
- Better marketing, including national level advertising
- Expanding the cultural offer and making more use of existing facilities, such as the Horse and Bamboo Theatre
- Better use of the countryside and links to sub-regional walking festivals
- Re-introducing the Motorbike Festival.

Additional Comments

6.44 A number of the respondents made additional comments. These group to the following aspects:

- The need for better promotion and management of Rossendale's attractions
- The need for environmental enhancement in Rawtenstall Town Centre
- The need to better exploit the borough's industrial heritage
- The need for more parks and open spaces, particularly in Whitworth.

Stakeholder Workshop

6.45 A stakeholder workshop was held on 19th April 2010. Attendees were invited to discuss the both the present strengths and weaknesses of tourism in Rossendale, and the future opportunities and threats.

6.46 The identified strengths of Rossendale include its existing attractions (notably Helmshore Textile Museum); food and drink provision; the landscape and countryside; accessibility to Manchester and the strength of local communities. Weaknesses include the condition of the town centres; accessibility within Rossendale; a limited accommodation offer and the lack of effective marketing or branding.

6.47 Future opportunities focus on marketing and branding. A number of branding themes were identified, including the Adrenaline Gateway, industrial heritage, art and creative industries. Opportunities for physical improvement include the redevelopment of the Valley Centre and the introduction of a commuter railway.

6.48 The threats to the future of tourism in Rossendale focus on risks from low quality or inappropriate new developments. Weaknesses in supporting infrastructure and services, notably the road network and public toilets, were also highlighted. A full list of comments is included in Appendix 3.

Stakeholder Consultations

6.49 A number of one to one discussions have been held with public sector and other stakeholders who are involved with the visitor economy at local, sub-regional or regional levels. Details of individual consultations are included in Appendix 6.

6.50 Comments made collate to the following five areas:

- The strengths of tourism in Rossendale
- The weakness of tourism in Rossendale
- Opportunities for future growth
- Marketing and branding
- Transport.

The Strengths of Tourism in Rossendale

6.51 Stakeholders see the ELR as the most significant individual attraction in Rossendale. Yet at present, Rawtenstall Town Centre does not derive significant benefit from its presence. However, the ELR has worked in partnership with local retailers in Ramsbottom to boost trade, and stakeholders encourage Rawtenstall to follow this example.

6.52 Rossendale also has a very strong cultural offer, relative to the size of the Borough. The See Galley and the Horse and Bamboo Theatre are institutions of regional and national quality and the Halo Panopticon is an internationally recognised symbol for Pennine Lancashire. The range of facilities on offer compares well to larger boroughs in Pennine Lancashire, such as Burnley.

The Weakness of Tourism in Rossendale

6.53 A number of future proposals are likely to improve tourism signage in the borough (see Section 5). However, at the time of consultation a lack of directional signage is seen as a weakness, making it difficult to access some attractions. Other support infrastructure (e.g. public toilets) is also lacking in the main towns.

6.54 Another weakness is the lack of existing accommodation to support the long distance walking/riding trails that pass through Rossendale. The range of accommodation is also insufficient to meet the needs of those attending major festivals (notably the

Singletrack Weekender and Pennine Lancashire Walking Festival), forcing people to stay outside the Borough.

Opportunities for Future Growth

6.55 Future opportunities to expand the Rossendale visitor offer are likely to be in the accommodation and food and drink sectors, both of which have seen recent investment.

6.56 The consolidation and expansion of the Adrenaline Gateway is another opportunity. Ski Rossendale is soon to be managed by a private sector operator, with significant prospects for future growth and investment. Despite the poor condition of some facilities, Ski Rossendale remains a key attraction and is popular with dedicated skiers. Future development of the Adrenaline Gateway may well include an indoor extreme sports facility.

6.57 Rossendale has the potential further expand its cultural tourism offer, particularly for art in the landscape. The Halo Panopticon already has international appeal and there are further opportunities to combine art with other tourism and leisure activities at Lee Quarry or along the Irwell Sculpture Trail.

Marketing and Branding

6.58 The consensus among stakeholders is that Rossendale lacks a clear identity. There is no clear branding or sense that you are ‘in’ Rossendale when visiting any town or attraction. Also, the Borough’s relatively small tourism offer is hard to market independently. However, there was no common view as to what (if any) alternative brand might be preferable.

6.59 The Pennine Lancashire brand is not yet widely recognised, although it is becoming better known through the work of Regenerate Pennine Lancashire (RPL). RPL will ensure local authorities include the brand in future designs for public realm improvements and local place marketing activities.

6.60 The Adrenaline Gateway brand is seen to lack geographic identity (i.e. it extends beyond Rossendale but does not cover all of Pennine Lancashire), and stakeholders could not agree as to whether it should be marketed as a wider Pennine Lancashire initiative.

6.61 There are considerable opportunities for the joint marketing of Rossendale by the Borough Council and Lancashire County Council. The County Council has a range of funding streams available for place marketing, and already markets Helmshore Textile Museum and the Rossendale Museum.

Transport

6.62 The provision of commuter rail services is considered to be key to the future of development Rossendale. Reports by ATOC and GMPTE (now GMITA) suggest use of the ELR to deliver main line services between Rawtenstall and Manchester Victoria (see Section 3). Although there are some technical obstacles to overcome, these are considered solvable. Such a scheme (using a heritage railway for national rail services) would be unique in the UK. There is a need to build sub-regional support to generate the lever of funding required. Contribution should be targeted from AGMA's funding for transport improvements in the M66 corridor.

6.63 There is also potential to create links between Rossendale and the Calderdale Line at Todmorden. Todmorden is only 5 miles from Bacup, with options to develop attractive cycle routes between the towns. Improvements to local bus services would be required. A similar approach might be taken with links to Rochdale. Rochdale is less than 8 miles from Bacup.

6.64 Stakeholders commented that public transport links between the ELR and other Rossendale visitor attractions are limited, with the small scale or specialist nature of many of them making it difficult to run commercially viable bus services connections. However, during the latter part of this study a privately operated heritage bus service proposal emerged, which may go some way towards addressing this (see Section 5).

Rossendale LDF Core Strategy

6.65 The LDF Core Strategy includes two key tourism policies – RLDF14: Tourism and RLDF15: Overnight Visitor Accommodation. These have been reviewed, and as a consequence it is considered some wording amendments should be made.

6.66 Some of the previously included geographic restrictions should be removed, or at least eased, on the basis that should developers/operators wish to invest in tourism related facilities in the Borough then they should not be constrained to specific towns. The current tourism offer, particularly related support infrastructure, is not sufficiently commercially robust to justify such a constraint.

6.67 It is also considered that RLDF14 be broadened to include wider outdoor recreation beyond 'Adrenaline Gateway' activity as well as including the role of events; the need for support facilities and training.

6.68 The wider Core Strategy document has been assessed and this has highlighted the following:

- There would be value in greater cross-referencing of policies
- In Section 1 – Consultation, to add weight to the economic role of tourism it would be worthwhile to include consultation with key agencies
- Section 2 – Context and Background – the comment on leisure needs at Page 23 fifth paragraph should be updated to reflect the Borough Council's decision on future leisure provision, or at least delete the reference to 2009. The 'Key Issues' should include the issue of attracting staying visitors, and in order to do so, the need for additional serviced and non-serviced accommodation
- Section 3 – Spatial Vision and Strategic Objectives - although the 'Adrenaline Gateway' is a transformational project, in reality it will only attract a narrow band of visitors. There is need to promote other opportunities, including outdoor (walking, cycling, riding); cultural (theatres); improving quality and mix (retail); addressing infrastructure needs (accommodation, hospitality, transport) and the softer issues (training and marketing)
- Section 4 – Area Visions and Policies – should Turn Village be added to the South West Rossendale area? Whilst there is strong mention of tourism and leisure, the East Lancashire Regional Park only seems to be referenced at AVP2
- Section 5 – Topic Planning Policies – RLDF7 should introduce reference to the potential to retain community facilities by combining functions (for example post offices with pubs). There is also need to consider links between policies (RLDF7, 9 and 14) for recreational cycling (development of off road and road) and using cycles for transport.

Summary

6.69 By comparison with other North West districts, Rossendale's tourism sector employment is numerically small. However, the study's findings suggest high numbers of visitors and customers are attracted. Although limited in the scale of provision, the quality of accommodation is good. Most attractions are open all year. Levels of visitor spend, based on the information supplied, also exceed North West averages.

6.70 Despite the recession, most businesses feel that visitor numbers have increased or stayed the same. Generally, businesses credit their own service or marketing improvements for any growth in visitor numbers. Any changes in the wider borough are not seen to have contributed.

6.71 Rossendale attracts visitors from across the UK and (in the case of the attractions and accommodation) overseas. Many are drawn from Greater Manchester or Yorkshire and Humber. Most travel to Rossendale by car.

6.72 The strengths of Rossendale's tourist offer are in its landscape and the range of outdoor activities available. The ELR and Helmshore Textile Museum are the strongest individual attractions. The main weaknesses relate to supporting infrastructure and environment quality, notably the condition of the town centres.

6.73 Stakeholders highlight the possibility of a commuter railway line as the most significant future opportunity for Rossendale. Strengthening links between Bacup and the Calderdale Line at Todmorden, or to Rochdale are further opportunities is a further option. There are presently few public transport links to the main tourist attractions, although this may be partially addressed by the delivery of a heritage bus service (see Section 5).

6.74 Rossendale lacks a clear identity and branding. Alternative brands exist in Pennine Lancashire and Adrenaline Gateway, which link Rossendale to the wider sub-regional offer. However, the latter brand is not yet widely recognised, while the former has no geographic identity (i.e. it extends beyond Rossendale but does not cover all of Pennine Lancashire). For this reason stakeholders are undecided as to whether or not it should be the 'Pennine Lancashire' Adrenaline Gateway.

6.75 The LDF Core Strategy has two key tourism related policies – RLDF 14 and 15. These address Tourism and Overnight Visitor Accommodation. Some word changes are considered necessary to reduce barriers to investor interest and to recognise wider outdoor recreation activity beyond the 'Adrenaline Gateway'. A number of further minor changes have been identified to the wider Core Strategy to ensure full recognition of tourism issues and opportunities.

7.0 CONCLUSIONS

7.1 In this section the findings of each of the preceding sections are drawn together into a number of conclusions. These have been formatted to follow the elements of the original study brief, namely:

- The current situation in terms of visitor attractions, supporting infrastructure and analysis of issues, constraints and opportunities. This includes estimating current direct and indirect economic benefits in terms of revenue/spend and jobs
- The structure of future development, including the main potential growth sectors by type and location, and keys supporting infrastructure requirements. This also to address the likely scale of economic and employment benefits, using different scenarios
- Policy recommendations for the Borough Council relating to the LDF Core Strategy, Tourism and Cultural Strategies, and Neighbourhood Plan Implications
- An action plan identifying key partners.

7.2 The conclusions and recommendations are the product of a wide-ranging consultation programme that has engaged with 27 individuals representing public sector agencies whose sphere of influence includes or touches upon the tourism offer and spatially upon Rossendale. Eleven public or private organisations with current or emerging tourism related development proposals have also been identified and consulted. Finally, 106 Rossendale based businesses that comprise elements of the tourism offer have also been consulted.

7.3 As a preamble to the conclusions drawn for each of the study brief's elements, a summary is provided regarding national, regional and sub-regional context for the tourism sector and economy. Key points to note are:

- The global economic situation has impacted on tourism in that international tourism has been more affected than domestic tourism, business tourism more than leisure tourism; hotels more than other accommodation types. Indeed the self catering accommodation sector has actually experienced growth during the recession
- UK tourism sector growth in recent years has been driven by a number of socio-demographic changes associated with increased levels of personal

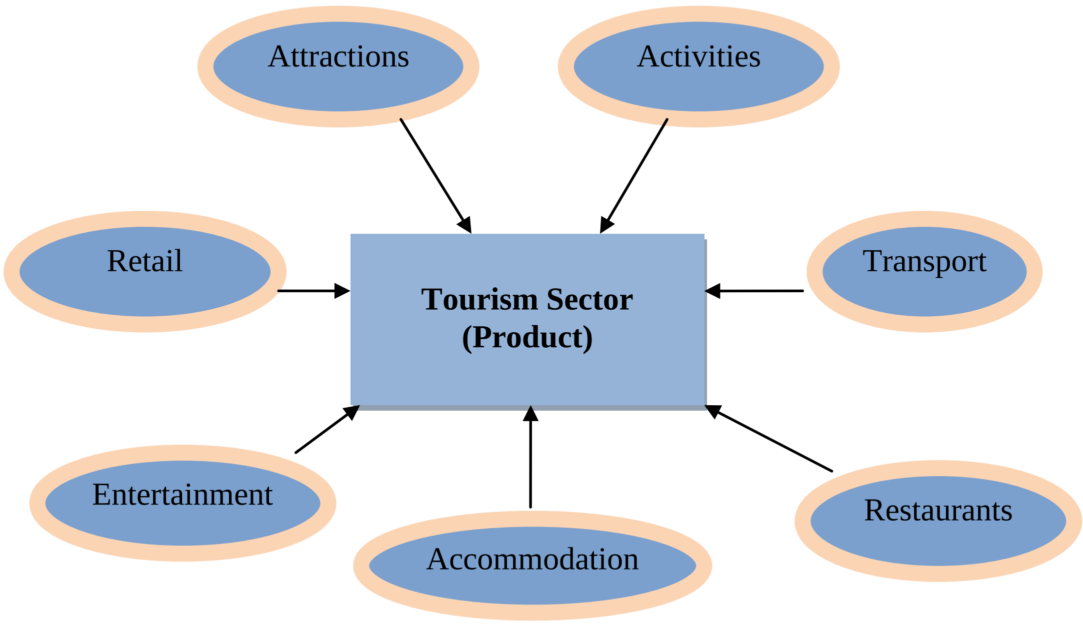
disposable income; long term economic growth and reducing unemployment; increased numbers of affluent consumers; increased numbers of retired people retaining relatively high incomes and more ‘time poor-cash rich’ consumers

- Tourists of the future are likely to be more affluent; travelling alone; taking more breaks, but of short duration; short of time and therefore seeking experiences which minimise effort to research and book; older but fitter and less likely to accept a sedentary lifestyle
- Tourism offer has to address trends towards shorter stays; continuing growth in online reservations; growth in business tourism and activity-based holidays
- Tourism sector is experiencing a growing role for small and medium sized enterprises (they are responsible for over 60 percent of employment in the sector), with the bulk of employment relating to accommodation, restaurant and food services
- PPS4 Planning for Sustainable Economic Growth (2009) and DCLG Good Practice Guide on Planning for Tourism (2006) are particularly important national policy and guidance notes to assist local authority policy makers
- At the North West level the role and contribution of tourism to the regional economy has to date been embedded in key strategic documents, although the future direction is fluid due to the new Coalition Government’s announcements to scrap regional planning policy. However the arguments relating to the need to improve the overall quality of the tourism offer (not just the quantity of attractions), and the wider impacts on the environment, transport infrastructure and access to local facilities, still have resonance
- The tourism sector is valuable in term of both direct and indirect revenue, and the support it provides for many other aspects of the economic and community make-up of an area
- Visitors staying in serviced accommodation generate the highest yield of expenditure. At the North West regional level, although accounting for less than 10 percent of days, they contribute almost a quarter of the total spend.

Rossendale Current Tourism Offer

7.4 The tourism offer comprises a number of supply side elements. These include visitor attractions and supporting infrastructure, and are summarised in Figure 3.

Figure 3 – Tourism Sector – Supply Side Elements



Existing Attractions

7.5 Current attractions and events are heavily influenced by the Borough's industrial heritage and natural assets. Heritage attractions include a number of museums and heritage centres, foremost of which is Helmshore Mills Textile Museum. The East Lancashire Railway, with its northern terminus at Rawtenstall, is the biggest attraction in terms of visitor numbers (circa 105,000 per annum). Other museums focus on local history. In the See Gallery and Horse and Bamboo Theatre there are two cultural venues of national and international renown.

7.6 Natural assets also contribute to the existing attractions. The outdoor dry ski slope at Rawtenstall attracts 50-70,000 visitors. Other significant outdoor sporting activities include Lee Quarry mountain biking centre; Whitworth water ski, Cowm Leisure motorsport. These adrenaline sports are augmented by a range of equestrian facilities and long distance bridleways, footpaths and cycleways that capitalise on the Borough's geography and topography. Art in the landscape features through sculpture trails as well as the iconic Halo Panopticon.

7.7 Although most of these represent niche markets, they have the advantage of being less competitive than many mainstream tourism activities, allowing Rossendale to capture a significant market share.

7.8 The food and drink sector is a growing contributor to Rossendale's attractions. The Taste Lancashire and Taste International programmes have generated a nine fold increase in accredited venues in the past year. The Taste International programme has been pioneered in Rossendale and is now being rolled out as a national initiative.

7.9 The locations of the current attractions and events are mapped in Appendix 4.

Supporting Infrastructure

7.10 The Borough currently has a limited accommodation offer. There is only one hotel, locally owned, and whilst bed and breakfast facilities trade well the offer is limited in numbers. There are supply gaps associated with hotels, caravan and camping sites, bunkhouses and youth hostels. There is a lack of accommodation at strategic stops along the long distance trails which pass through Rossendale. The lack of appropriate services discourages long distance walkers, riders and cyclists from stopping (and spending) in the Borough.

7.11 Most visitors to Rossendale arrive by car. This reflects both the physical isolation for many of Rossendale's attractions and the lack of public transport options. Although better public transport links would benefit the visitor economy, there are issues to overcome. These are summarised in the following commentary of Issues, Constraints, and Opportunities.

7.12 Although visitor spend data shows the importance to the local economy of retail and catering (these account for 53 percent of total visitor spend in Rossendale), the tourism audit identifies only a small number of shops are marketed towards visitors. This is exacerbated by concerns, particularly focused on Rawtenstall and Bacup town centres, about the condition of the general built environment and town centre offer.

Volume and Value Data

7.13 The study has sourced employment data from NOMIS and the L&BTB. The most up to date published figures relate to 2008. NOMIS identify their figure from the Annual Business Inquiry Employee Analysis. L&BTB commission STEAM data. The figures show some marked difference, with NOMIS indicating the tourism sector provides 1527 jobs against L&BTB's 1098 jobs.

7.14 It is difficult to draw comparisons between the two figures because of how they are calculated. For example, ABI data relates to a limited number of Standard Industrial Classifications considered as constituting tourism activities, whilst STEAM data includes in its total some 20 percent considered as indirect employment generated from tourism. Applying the same ratio of direct:indirect employment to the ABI figure increases the number from 1527 to 1927 jobs.

7.15 Trend analysis of figures since 2005 reinforces the differing picture between the two data sources. The common feature is that numerically, compared to other local authority areas, Rossendale's tourism sector employment represents the lowest in the North West region. Yet this is more a consequence of the small scale of Rossendale's local economy, as the percentage share of employment linked with tourism (at 7.1 percent) is commensurate with the regional performance of 7.2 percent. It is however below the Lancashire and Blackpool sub-regional average of 8.4 percent; and is the second lowest percentage rate of all the Pennine Lancashire local authority areas.

7.16 Analysis of where tourism employment is provided in Rossendale, compared with the region and sub-region, reveals differences. It should be noted there are also differences between both region and sub-region, with the percentage share attributed to accommodation substantially higher in Lancashire and Blackpool (over 26 percent compared to 15 percent in the North West), but indirect employment representing a lower share at this sub-regional level (a quarter less than the North West's 24.5 percent figure).

7.17 The limited nature of Rossendale's accommodation offer is reflected by its employment share. At 8.6 percent this is just over half the regional average, and less than one-third of the sub-regional figure.

7.18 The Food and Drink and Shopping sectors provide significantly higher employment shares in Rossendale than is the case for either the region or sub-region. Over 62 percent of all the tourism jobs are associated with these two sectors, according to STEAM data. STEAM data indicates 334 jobs are associated with Food and Drink. However the NOMIS ABI data states it is double this, at 678 jobs.

7.19 STEAM data for 2008 provides details of current visitor numbers. It indicates the Borough attracted around 2.17 million visitors, generating 2.34 million visitor days. Data for the period since 2005 shows the North West region increasing both numbers of visitors and visitor days year on year. This was not the case for Rossendale.

Although the Borough mirrored the sub-regional dip between 2006 and 2007 in the number of visitors, unlike Lancashire and Blackpool it also experienced a dip in that period for the total of visitor days.

7.20 However, as indicated in the Economic Analysis report, Rossendale's figures reflect an underlying trend of a small incremental rise year on year in the length of the average stay. This is due in particular to growth in the non-serviced accommodation sector, and to the lesser degree in serviced accommodation.

7.21 Analysis of the percentage shares, attributed to the different sectors of the visitor economy shows a very different picture for Rossendale compared to the North West and sub-regional experience. The accommodation sectors (serviced and non-serviced) represent only 1.7 percent of the visitor days total. For Lancashire and Blackpool, the figure is 24 percent; for the North West, it is 16 percent. Day visitors dominate Rossendale's market, making up over 87 percent of the total.

7.22 Current annual visitor spend is around £67 million (2008 figure). This is sourced from STEAM data, which shows a relatively flat picture over the four-year period to 2008, for which data is available. This equates to revenue per head of population of £998.

7.23 The Rossendale per capita revenue is significantly below the sub-regional and regional averages identified by the NWDA for 2008. These are £2143 and £2123 respectively. Uplifting Rossendale to even the lesser of these figures (the regional average of £2123 per head of population) would generate at least a further £75 million injection into the local economy.

7.24 The differing performance also reflects in the breakdown of spend attributed to the various sectors of the tourism markets. Visitor spend generated from the serviced and non-serviced accommodation sectors represents only 6.3 percent of Rossendale's total. In contrast, the comparable figure for the North West is five times higher, and almost eight times greater for Lancashire and Blackpool.

7.25 Almost one-third (32 percent) of tourism related expenditure reflects indirect expenditure. Shopping is the next highest share (25 percent) followed by Food and Drink (18 percent). These latter two are the main expenditure areas for both day and staying visits.

7.26 Spend per trip analysis shows the serviced accommodation and day visitors sectors are at parity between Rossendale and the sub-region. Non-serviced accommodation generates a higher figure than the region and sub-region but spend from those Staying with Friends or Relatives is lower.

7.27 Overall Rossendale's average spend per trip at £31 is two-thirds of the regional figure and only 60 percent of that for Lancashire and Blackpool. Raising the spend in Rossendale to that of the North West as a whole could contribute to an additional £37 million into the local economy.

Issues, Constraints and Opportunities

7.28 The following table (Table 40) summarises the key issues, constraints and opportunities arising from the audit of the current tourism offer.

Table 40 – Rossendale Tourism Offer Issues, Constraints, Opportunities

Issues	Constraints	Opportunities
• National planning policy guidance states most tourist accommodation should be in or adjacent to existing towns and villages but this may not be appropriate for the demand characteristics of Rossendale's offer • Planning policy needs to recognise diversity of tourism – not to adopt 'one size fits all' approach • Need to improve quality of the tourism offer, not just the quantity of attractions • Need to recognise and address key trends such as role of online reservations, staff upskilling, dominance in tourism of small and medium size businesses • Interpretation and way-finding information is patchy and marketing activity fragmented • Limited commercial leisure, entertainment and cultural offer • Current tourism sector heavily depends on day visitors, whereas overnight visitors generate much higher proportional spend • Numerically small current tourism offer in terms of	• Limited public sector funds to pump prime attractions and deliver new infrastructure investment • Existing poor town centre offer in terms of retail offer and built environment condition • Current limited nature of accommodation provision • Existing limited public transport offer (bus only) and transport infrastructure is biased towards west of Borough, though many attractions are in the east • Lack of locally collated data regarding value and volume of tourism sector • Limited population size militates against new large scale commercial leisure investment. Market captured by surrounding larger towns • Existing infrastructure associated with some attractions (car parking, toilets, catering, overnight accommodation) • Lack of directional road signage is barrier to accessing Rossendale – particular concern because of dispersed nature of	• Capitalise on sub-region's themes of Country Escapes and Living Legends because of adrenaline sports and heritage clusters • East Lancashire Railway to become commuter rail link to Manchester • Natural assets provide platform for growth associated with natural tourism market • Expand visitor accommodation by addressing supply gaps of hotels, youth hostels, bunkhouses, caravan and camping sites • Collaborative marketing between different types of operators/providers • Further develop Food and Drink offer linked to Taste Lancashire/Taste International brands • Tourism is not constrained geographically within the Borough. It is a borough-wide resource and opportunity • Emerging development proposals from both the public and private sector • Improve public transport connections with Todmorden

Issues	Constraints	Opportunities
jobs, visitor numbers and total spend • Lack of co-ordination between largest attraction (East Lancashire Railway) and Rawtenstall town centre results in lost opportunities • Lack of cohesive identity and branding for Rossendale.	attractions • Small scale of the Borough, limited number of attractions and available resources, make it difficult to market at regional/national levels.	and Rochdale to capitalise on rail services • Improve directional road signage.

Source: BE Group 2010

7.29 Particular attention is required for the topic of branding. Alternative brands exist with the Adrenaline Gateway and Pennine Lancashire. The Adrenaline Gateway represents a clustering of Rossendale's key attractions, but ultimately only supports a specialised portion of the visitor offer. There is also confusion over the geographic identity of the brand (i.e. it extends beyond Rossendale but does not cover all of Pennine Lancashire). For this reason, stakeholders are unclear as to whether or not it should be the 'Pennine Lancashire' Adrenaline Gateway.

7.30 A sub-regional approach to marketing might overcome Rossendale's lack of individual identity, while also embracing the Borough's entire visitor offer. A collective approach to marketing also allows access to a greater range of funding and provides a prominence that Rossendale could not achieve by itself.

7.31 Until recently there was a lack of connection between providers, support businesses and public agencies. This is now changing, in part due to the work of the Borough Council's Tourism Officer. A notable success has been the Taste Lancashire/Taste International accreditation scheme, which has brought Borough Council officers and local cafes/restaurants together and is encouraging further joint-marketing activities.

7.32 Within Rossendale culture and arts, leisure and regeneration are all recognised as important growth sectors, yet they are managed by separate Borough Council departments. Given the comparatively small geographic scale of the borough and the overlapping nature of these sectors, it might be preferable to combine these functions into a single department.

7.33 There is also a lack of data about tourism in Rossendale, whether this is the economic contribution of the industry, occupancy rates, visitor numbers or tourists' views. Only two visitor attractions (Ski Rossendale and the ELR) keep detailed information on their visitors, and most other attractions could only estimate visitor numbers. Future collaborative working should explore whether tourism data can be collectively compiled to provide a realistic picture of Rossendale's visitor economy.

Future Tourism Offer

Attractions

7.34 Proximity to the urban conurbations of Manchester, Central Lancashire and West Yorkshire delivers a substantial catchment for Rossendale's tourism offer. This is evidenced in the analysis of the origin of visitors gathered during the study's primary research.

7.35 The Borough's high quality rural landscape has enabled it to take a regionally significant role in a range of outdoor sporting activities. This could underpin further growth, capitalising on trends in tourism towards short leisure and activity breaks as well as in natural tourism. There is however need to support this with the infrastructure investment that would then capture more visitor spend associated with accommodation provision.

7.36 Reinforcing this message Rossendale has the assets and opportunity to engage with two of the L&BTB's thematic approaches to the visitor economy. These are 'Country Escapes' and 'Living Legends'. Priority actions identified for each of these themes are summarised in Table 41, where there is readily identifiable fit with, or for, Rossendale.

Table 41 – Sub Regional Tourism Thematic Priority Actions to 2016. Fit with Rossendale

Country Escapes	Living Legends
• Develop thematic business clusters for cycling, walking, watching wildlife • Develop adrenaline sports in the West Pennines • Grow the potential of existing events, especially those with strong, local diverse theme • Develop the quality of the accommodation and food offer.	• 'Polishing gems' programme to improve setting, facilities, marketing of museums and heritage sites • Create a heritage cluster for development and marketing activities • Celebrate industrial heritage through investment in buildings, public realm and marketing • Strengthen and co-ordinate existing events

Source: L&BTB 2009

7.37 Potential sectors for growth for Rossendale are:

- Natural tourism
- Accommodation providers
- Local food and drink
- Thematic business clusters, targeting specific visitor interests or types of visitor.

7.38 Natural tourism is based on, and motivated by, experiencing the natural environment. Whilst much is relatively passive (enjoying the scenery or eating out) there are also activities which take place and for Rossendale these include walking, cycling, horse riding, adrenaline sports, leisure learning and events/festivals with a natural environment theme.

7.39 The positive trend nationally in tourism growth reflects holiday tourism associated with self-catering, caravanning and camping. Whilst Rossendale has seen an increasing stock of self-catering provision there is no accredited caravan or camping site in the Borough. There is no youth hostel. There is no accommodation linked to key existing attractions. The provision of such facilities is important to the future tourism offer. This also applies to the attraction of modern hotel accommodation as this generates business tourism as well as leisure visitors. These are considered to be priority areas for pro-active marketing, to attract and secure developers/investors. They also generate challenges for planning policy as the LDF Core Strategy presently seeks to focus significant hotel development into Rawtenstall and Bacup. However, linking accommodation to major trails will require some development in rural areas, while linkages to the Greater Manchester market will encourage development in the south of the Borough. Planning policy needs therefore to balance the need to show flexibility in the face of such demand with other policy priorities.

7.40 As referenced earlier Rossendale has the seed of a potentially strong food and drink offer. Much of the recent new business creation has been associated with this. There is desire to ensure the quantity and quality draws comparison with the Ribble Valley, traditionally seen as Lancashire's dining capital. However eating out, whilst remaining a core activity for all visitors, is rarely the main motivating factor for any visit. So, although a strong food offer is important this should not be developed at the expense of other attractions.

7.41 Thematic business clusters present opportunity to capture market share; facilitate more focused marketing and branding and heighten differentiation of Rossendale's offer. Countryside and rural activities are a particular strength, providing scope for clusters. These could be complemented in the future by related indoor facilities for 'wet weather' occasions. Collaborative marketing amongst such clusters could involve groupings as small as four partner businesses or organisations, but should be based on at least two types of operator e.g. visitor attraction, accommodation provider, local food, transport provider, asset manager.

7.42 The built heritage of Rossendale's towns is comparable to that of Hebden Bridge, Howarth or Ramsbottom. This is evidenced by the range of individual buildings that provide visitor attractions. However, the lack of good quality streetscapes and a strong retail offer mean action is needed before they could be collectively marketed as heritage visitor attractions in the manner that has been successful elsewhere.

7.43 The study has identified a number of emerging developments that will strengthen the visitor offer and importantly the accommodation infrastructure. Proposals include public sector investments focusing on the improvement and expansion of the Borough's footpaths, cycleways and bridleways. Public agencies also propose new festivals and marketing activities linked to Rossendale's attractions.

7.44 There are current private sector proposals to address gaps or under provision in support accommodation. Significantly these include, if delivered, at least one national chain hotel as well as a range of self catering options. There are additional projects that include a privately operated heritage bus service connecting key attractions with Rawtenstall Station. Also, the Borough's first camping site. Of the existing visitor attractions, the Adrenaline Gateway has the most significant plans for expansion, including the option of an indoor extreme sports venue with facilities that would be unique in Northern England.

7.45 Site specific proposals are mapped in Appendix 4.

7.46 Underlying Rossendale's future tourism offer are several generic key themes. These are:

- Quality (increasing demand for higher quality accommodation, with this and customer care being key factors in deciding whether or not to make a return visit)

- Business tourism (business tourists demand high quality standards, yield high receipts and utilise many venues otherwise poorly patronised out of season)
- Niche markets (growing diversification of the market into various quality and experience segments)
- Technology (user friendly technology will increase the level of self-booking, and the use of the internet will only increase, aiding the rise in independent travel)
- Sustainability.

Key Supporting Infrastructure

7.47 For Rossendale's future tourism offer to flourish and be sustainable a number of associated infrastructure-related improvements are required. Reference has already been made to expansion of the accommodation infrastructure, including addressing gaps in both the serviced and non-serviced sectors. Others areas relate to public transport – visitor interpretation, information and facilities improvements and labour market upskilling.

7.48 The East Lancashire Railway is Rossendale's most successful individual visitor attraction. It also represents a key transport link although this is not being fully capitalised on. Rawtenstall, despite being the northern terminus fails to attract the major share of visitors. Reasons for this, to be addressed, include the lack of linkages between the station and the town centre; the lack of information or marketing available to passengers; poorly defined pedestrian routes; a lack of coordination between the railway and town centre retailers (manifested by most town centre shops being closed on Sundays – a peak day for rail users).

7.49 Proposals to enhance the East Lancashire Railway to also become a commuter rail link to Manchester represent a medium to long-term opportunity for a step change in the Borough's public transport infrastructure. The technical challenges to be faced can be resolved. Effort needs to be put to securing sub-regional support to generate the funding, but the proposals would make a significant positive contribution to addressing the overcapacity issues of the M66/M60 corridor.

7.50 Other rail related options that could be immediately actioned would be to connect with the rail stations at Todmorden and Rochdale. Both are within eight miles of Bacup, with possibilities to develop better bus and cycle routes. At present most of the major transport infrastructure is focused to the west of Rossendale. The development of links in the east would help capitalise on the acknowledged visitors' catchment area of Yorkshire, and connect more easily with the part of Rossendale where most outdoor activity is concentrated.

7.51 The lack of directional road signage is seen as a barrier to accessing Rossendale. This is a particular concern given the dispersed nature of attractions. So, whilst the Borough and County Councils have investment programmes in place to deliver new strategic signage, continuing monitoring is required to ensure that new signs meet visitor needs and allow access to the smaller visitor attractions.

7.52 Improving the provision of interpretation and visitor information; the quality of visitor facilities and the management of 'honeypot' sites are areas requiring attention. Notwithstanding the scope for increased natural tourism is based on the Borough's natural assets, such infrastructure improvement and investment is necessary to facilitate the tourism taking place. This includes modern visitor centres/trailheads; enhancing physical access; car parking; signposting; producing and installing interpretation and communication materials. It requires capital investment in provision, and revenue funding for ongoing maintenance. The rationale is that such investment leads to extended visitor stay time and spending, as well as profile raising.

7.53 The long-term prospects for tourism growth are good, so the need to attract, train and retain higher quality labour is core to the sector's longer term sustainability. Upskilling will help to raise productivity and equip employees to respond to the realities of the knowledge economy. A culture of life-long learning is needed but the predominance of SMEs in tourism service providers presents challenges in the context of ensuring training and skills improvement programmes are available and accessible, to smaller businesses.

Volume and Value Forecasts

7.54 Potential scenarios for the level of future employment in tourism in Rossendale are addressed in the separate Economic Analysis document (Appendix 7). It is not possible to forecast beyond 2016 as little data is available to enable this. However, the following scenarios have been considered:

- Application of the current L&BTB Destination Management Plan's 40 percent growth target for visitor related jobs, for the period 2005 to 2016
- Application of the current L&BTB Destination Management Plan's annual performance targets year on year percentage change. These relate to the

period 2008 to 2013, but have been projected on to 2016

- Application of the GDP growth projections included as forecasts (2008 to 2020) in the Borough Council's Employment Land Review – but only to 2016
- Application of the NOMIS ABI statistical trend from the period 2002 to 2008, projected forward to 2016.

7.55 Each scenario addresses the impact on both the ABI and STEAM sourced data. In addition the impact of including indirect employment to the ABI data has been incorporated into each scenario. This has applied the ratio evidenced in the STEAM data. Table 42 summarises the forecasts for employment at 2016.

Table 42 – Rossendale Tourism Related Employment Numbers – 2016 Forecast Alternative Scenarios and Assumptions

Assumptions	Alternative Scenarios – No. of Jobs		
	STEAM	ABI	ABI and Indirect Employment
1. 40 percent increase, 2005-2016 L&BTB target	1620	1760	2220
2. Annual performance targets, 2008-2013 projected to 2016, L&BTB target	1161	1613	2308
3. Increase aligned to GDP forecast growth 2008-2016, RBC Employment Land Review	1237	1732	2186
4. Historic trend 2002-2008, projected forward to 2016, NOMIS ABI data	1422	1978	2497

Source: BE Group/Global Tourism Solutions/NOMIS 2010

7.56 As Table 42 illustrates the various assumptions generate a wide-ranging spectrum of possible employment levels for 2016. Using the STEAM model baseline of 1098 jobs (both direct and indirect tourism sector employment) for 2008, the increase ranges from just 63, to 522, new jobs over the next six years. Because the ABI baseline figure is significantly higher to start with, at 1527 jobs in 2008, the number of predicted additional employment opportunities varies from 86 to 451 jobs. Introducing indirect employment as well to the ABI data suggests a further 259 to 570 jobs could be created.

7.57 The tourism market is a competitive and dynamic one, characterised at the moment by growth in short, weekend breaks; high value tourism; educational and activity breaks; shopping and increasing quality expectations. It is a market influenced by an increasingly wealthy, independent, ageing population. This is likely to be the case for the foreseeable future.

7.58 Projections for future visitor numbers have been calculated to 2016, based on growth and performance targets defined at the Lancashire and Blackpool sub-region level. Growth in visitor numbers is targeted to rise by 41 percent over the 2005-2016 period. The performance targets, addressed in detail in the Economic Analysis document, relate to a shorter timeframe of 2007-2013.

7.59 Applying the 41 percent growth target suggests Rossendale should be aiming for 3.15 million visitors by 2016. This represents an increase of just under one million additional visitors from the latest published data (2008). Projecting forward the 2007-2013 performance targets to 2016 produces a somewhat lower figure of 2.56 million visitors. This would represent 16.5 percent increase over the 2008 figure.

7.60 The sub-regional growth target seeks a 22 percent increase in visitor spend by 2016, from a baseline set at 2005. This would see Rossendale attracting a visitor spend total of £82.8 million, an increase of £15.62 million per annum by comparison with 2008.

7.61 Projecting forward (to 2016) the sub-regional performance targets for 2007-2013, produces an annual spend figure of £78.95 million. This reflects a £11.77 million increase from 2008's figure.

7.62 Both of the above figures relate to the Borough's spend calculated from STEAM data. As noted earlier in this section the spend per head of population is less than half the regional and sub-regional averages. Uplifting to the regional average could see a visitor spend total at 2016 of between £153 million (based on the projected sub-regional performance targets) and £174 million (based on the 22 percent uplift from 2005) injected into Rossendale's local economy.

7.63 Maximising the Tourism sector's full economic potential for Rossendale's local economy requires the Borough Council to ensure there is an integrated approach to policy development and delivery across all its relevant departments. It also requires ongoing commitment to work with the private businesses that make up the tourism sector, and with other partner agencies that can make a valid contribution. This is largely in place in that most relevant functions reside within one department, although these are not all co-located. The Borough Council's recruitment of a Tourism and

Town Centre officer has begun the process of close engagement with all elements of the tourism offer.

7.64 The most important actions central to the success of Rossendale's tourism sector in the future are:

- Investment in quality and skills
- Marketing and branding
- Sustainable product development and innovation
- Long term strategic planning
- Reducing barriers to tourism development
- Instilling a culture of evaluation and capacity building
- Co-operation and partnerships.

7.65 Sustainability is an issue, to ensure natural assets are not vulnerable to over-use. Managing access arrangements, and the provision of visitor facilities close to areas of activity, need to be considered alongside product development and marketing.

7.66 Tourism Strategy and Neighbourhood Plans should favourably consider infrastructure related projects targeted at sites (or group of smaller sites in a defined geographical area) which attract significant numbers, and where the attraction is based on important natural environmental assets. This is particularly pertinent to the east of the Borough, which has the larger concentration of outdoor leisure pursuits. Such projects could involve creating or improving car parks (and associated approach road/on-site signage); new or enhanced toilets; footpath creation, repairs or upgrading; investment in new bus services; visitor management measures.

7.67 The Neighbourhood Plan for Rawtenstall should include short term plans to focus on improving signage, lighting, walkways between the station and the town centre, together with improvements to the station itself.

7.68 This study has particularly reviewed the content of the LDF Core Strategy's two key tourism policies – RLDF14 'Tourism' and RLDF15 'Overnight Visitor Accommodation'. It is considered some change is made to the policy wording to remove geographic restrictions that might constrain investor demand and to reference broader outdoor recreation beyond just 'Adrenaline Gateway' activity.

7.69 The wider Core Strategy document has also been assessed. This has identified a small number of suggested changes, detailed in the Recommendations section of this report.

8.0 RECOMMENDATIONS

8.1 This section sets out a series of recommendations relating to the continuing development and promotion of Rossendale's tourism offer. The recommendations reflect a number of Strategic Objectives that in turn would lead to related Action Plans. In addition recommendations are made for amendments to the LDF Core Strategy document, and the content of key LDF planning policies that influence the tourism sector. The recommended changes to planning policies are addressed first.

LDF Planning Policy – Proposed Amendments

8.2 The following changes are recommended for the Core Strategy:

- **Section1 – Consultation – to add weight to the economic role of tourism, include consultation with key agencies**
- **Section 2 – Context and Background – 1) update the commentary on leisure needs to reflect the Borough Council's decision on future leisure provision (or at least delete the reference to 2009). 2) Add to Key Issues the issue of attracting staying visitors, and thus the need for additional serviced and non-serviced accommodation**
- **Section 3 – Spatial Vision and Strategic Objectives – make reference to promoting other opportunities beyond the Adrenaline Gateway, to appeal to a wider spectrum of visitors, including outdoor (walking, cycling, riding); cultural (theatres); improving quality and mix (retail); addressing infrastructure needs (accommodation, hospitality transport) and softer issues (training, upskilling, marketing)**
- **Section 4 – Area Visions and Policies – increase reference to the East Lancashire Regional Park beyond just Policy AVP2**
- **Section 5 – Topic Planning Policies – 1) RLDF7 should make reference to the potential to retain community facilities by combining them (for example pubs and post offices). 2) Consider links between Policies RLD7, 9 and 14 for recreational cycling (development of off road and road facilities) and the use of cycles as a transport mode.**

8.3 The two primary policies are RLDF14: Tourism and RLDF15: Overnight Visitor Accommodation. It is recommended that the wording of both policies is amended from that set out in the Core Strategy Development Plan Document.

8.4 A key recommendation is the removal of some of the previously included geographic restrictions, on the basis that should developers/operators wish to invest in Rossendale (subject of course to the normal development planning criteria), they should not be constrained to certain towns.

8.5 Equally it is recommended that RLDF14 be broadened to include wider outdoor recreation beyond 'Adrenaline Gateway' activity, (for example footpaths, cycleways) as well as including the role of events, the need for support facilities (accommodation/hospitality) and training. It is also recommended that there be more cross-referencing between policies.

8.6 The recommended wordings for these two key policies are as follows:

RLDF 14: Tourism

Tourism is important to Rossendale and its development will be encouraged throughout the Borough, building on the area's distinct leisure and cultural facilities and activities. The development of Active Sport is a particular opportunity that will be supported in the following ways:

- **Ensuring through the Allocations Document that key sites are identified for tourism in general and specifically to support the 'Adrenaline Gateway'**
- **The development, extension and upgrading of footpaths, cycleways and bridleways, specifically: the Rossendale Way, Irwell Sculpture Trail, Valley of Stone and Mary Townley Loop (link with RLDF 9); and more generally the Public Rights of Way Network, supported by appropriate signage, interpretation and public art**
- **Events promotion**
- **Development of complementary accommodation and hospitality facilities (link with RLDF 15)**
- **Facilitating the Regional Park for East Lancashire.**

Rossendale has a strong cultural offer, and proposals for the enhancement of existing facilities and activities (and supporting infrastructure such as car parking, bike racks, public realm etc) and the development of new facilities and activities will be considered favourably, where appropriate. This includes attractions such as: the East Lancashire Railway; Helmshore Mills; Cowm

Reservoir; Rossendale Museum; and the Halo 'Panopticon'.

Linked to this, planning proposals for the expansion and enhancement of the creative industries such as artist studios, and theatres such as the Horse and Bamboo, the Millennium and Theatre Royal will be given positive consideration.

The countryside will be protected and enhanced both for its own sake and for its tourism value, in particular within the designated West Pennine Moors area and the South Pennines moorland.

Access to tourism specific training will, through cross-sector partnership, be actively supported (link with RLDF 6).

RLDF 15: Overnight Visitor Accommodation

The Council will take a positive approach to the development of both serviced and un-serviced accommodation of quality where they are appropriate to their locality; access is good (with no adverse effects on the local road network); the capacity of the existing infrastructure is suitable; there is no harmful effect on the landscape; where appropriate re-use is being made of an existing building, and where need can be demonstrated.

Plans for hotels, bed & breakfast establishments, camping and caravanning sites, and camping barns will be encouraged most particularly where they complement existing tourism facilities in the Borough.

Future Structure for the Visitor Economy/Tourism in Rossendale

8.7 This study has compiled a comprehensive list of attractions, events, accommodation and other infrastructure providers that comprise Rossendale's tourism offer. Work already undertaken by the Borough Council's Tourism Officer, and feedback from the study's consultation workshop, has provided evidence of the interest in, and potential value of, establishing a formalised business network for the sector.

8.8 As the Borough Council is inextricably linked with the tourism sector (as a regulatory and planning authority; as a funder, facility owner, manager, infrastructure provider), it has an interest in the growth and sustainability of the sector. This is also the case for other public agencies whose sphere of influence includes tourism and

Rossendale. However, the Borough Council should take the lead in bringing all relevant parties together and act as facilitator for this grouping.

8.9 In this respect the following recommendations are made:

- **Building on the appointment of a Tourism Officer, the Borough Council should to establish a Tourism/Visitor Economy Forum. This is to comprise representatives from both the public and private sector – for example Rossendale Partnership; Lancashire & Blackpool Tourist Board; Lancashire County Developments Ltd; Regenerate Pennine Lancashire; representatives from the attractions, retailers, events, accommodation, food and beverage sector**
- **Establish Terms of Reference that reflect the roles of representing Rossendale's tourism sector; co-ordinating activity such as events; being a conduit to further engage, consult and develop the tourism product.**

8.10 As an example of responsibility, short-term activity might be to debate and provide consensus views on the County Council's imminent proposals for new directional/brown signage within Rossendale.

8.11 Arts and culture, leisure and recreation, economic development and planning all contribute to the Borough's tourism offer. Despite the comparatively small scale of tourism (measured against other North West local authority areas) and the relatively small size of Rossendale Borough Council, scope exists to enhance how the Borough Council effectively addresses the sector. For example, there could be greater co-location of appropriate personnel. Such action would deliver a strong positive message of how important the tourism sector is seen as a driver of the local economy, as well as delivering a more focused approach.

8.12 It is therefore recommended that**:**

- **The Borough Council examines how it might improve the provision of appropriate responsibilities, staffing and their location, for tourism related activity.**

Product Development

8.13 It is important that Rossendale has key themes which do, or have the potential to, differentiate Rossendale as a tourism product from other locations. Whilst some products such as the Adrenaline Gateway may extend beyond the Borough, it is possible to readily identify others that capitalise on existing assets and/or facilities.

8.14 Consequently it is recommended that:

- **The Borough Council seeks to achieve tourism product development initially linked to the themes of outdoors/active recreation; heritage (transport – East Lancashire Railway; buildings and attractions (Helmshore Textile Museum; Bacup and Rawtenstall town centres); film/TV location; specialist retail (for example Fitzpatrick's Temperance Bar; The Fudge Shop; Sunday Best; Ride-On); creative industries (Art Academy Bacup; art in the landscape trails); food and beverage (Taste Lancashire/Taste International accreditations)**
- **Tourism sector partners refine and develop the events calendar within the borough to deliver a year round programme.**

Accommodation Infrastructure

8.15 The study has found that whilst the Borough has seen increased provision of good quality bed and breakfast accommodation, inherently Rossendale has a poor mix of both serviced and non-serviced facilities. There are significant gaps in supply – only one hotel; no accredited caravan or camping sites; no youth hostel facilities and a very limited provision of bunk house space. The percentage of overnight visitors is substantially below the regional average. The development of new facilities is crucial to attracting staying visitors. This would also enable Rossendale to capitalise on changing market trends such as short breaks; activity holidays, and benefit from the higher per capita spend associated with staying visitors.

8.16 To address this the following recommendations are made:

- **The Borough Council produces a marketing brochure targeted at hotel developers/operators, which details background to the area; population/visitor numbers; transport communications; assets together with identified potential development sites (including availability, ownership details, services, planning context details). The Borough Council then to use this in proactive marketing to the sector**
- **The Borough Council to produce a similar brochure targeting unserviced accommodation providers – for example the YHA; The Caravan Club; The Caravanning and Camping Club.**

Transport Infrastructure

8.17 Public transport infrastructure is very important to the tourism sector, particularly in the longer term for reasons of sustainability and for attracting higher visitor numbers.

8.18 The East Lancashire Railway is a key asset and activity associated with the railway is recommended at two levels. For the short and medium the recommendations are:

- **Continue to commit resources to secure improvements to the facilities at Rawtenstall station, addressing as a minimum physical and public transport linkages between the station and Rawtenstall town centre. This is to encourage more users of the railway to consider Rawtenstall as a viable option as part of the day out**
- **Better joint marketing with East Lancashire Railway, and the provision of a tourist information point at Rawtenstall station**
- **A concerted effort to demonstrate the railway's value to Rawtenstall town centre businesses (as Ramsbottom has successfully done) of being open to coincide with the railway's peak business times – Saturdays and Sundays**
- **Rossendale Borough Transport to be invited to participate in the joint marketing approach – for example to widen out the current joint rail-bus ticket to Rossendale based attractions other than just Rawtenstall town centre.**

8.19 For the longer term the recommendation is:

- **The Borough Council to actively work with the East Lancashire Railway, Bury and Rochdale Councils and the Greater Manchester Integrated Transport Authority, to pursue the possible delivery of a commuter rail link connecting with Manchester Victoria. Lobbying should be allied to the GMITA connection and 'Congestion Charge Plan B' monies, rather than via Lancashire, as the latter has other rail route improvement priorities to promote.**

8.20 It is evident that current bus/rail transport emphasis is based on the north-south axis through the west of Rossendale. However there is scope to exploit the currently largely ignored rail links within relatively easy reach of the eastern part of the borough, which is also the area of much of the outdoor recreation activity. The Halifax-Manchester Line passes through Todmorden, which is only five miles from

Bacup. Rochdale's rail station is also within eight miles.

8.21 Consequently it is recommended that:

- **The Borough Council explores with the South Pennine Rail Partnership, West Yorkshire Passenger Transport Executive and Rossendale Borough Transport how joint rail-bus services and ticketing might be promoted using Todmorden as a rail gateway to serve the eastern part of the Borough.**
- **The Borough Council engages with the Greater Manchester Integrated Transport Authority and Rossendale Borough Transport to promote joint rail-bus services and ticketing using Rochdale as a rail gateway to serve the east and south of the Borough.**

Branding

8.22 At present there is no branding to distinguish Rossendale's offer. Consultations undertaken amongst key external public agencies, as well as with stakeholders within the borough have served only to reinforce the challenge faced. The evidence is of mixed messages about the branding associated with Rossendale's tourism offer.

8.23 The dichotomy of views indicates there is urgent need to agree a common approach which individual attractions and events can attach to. The issue is compounded by a perceived current lack of awareness of either Rossendale or Pennine Lancashire as readily identifiable brands.

8.24 Whilst Pennine Lancashire might geographically be more readily identifiable, subsuming into this brand is far from uniformly welcomed and may not necessarily be in Rossendale's best interest. The 'Adrenaline Gateway' is too narrow in its own right, but would fit within a wider brand such as 'The Great Outdoors' that encompasses walking, cycling, skiing, horse riding, and water sports.

8.25 Determining the most appropriate attack brand should be a matter of high priority, because of related investment decisions and actions – for example planned new directional signage ought to reflect the brand.

8.26 It is therefore recommended that:

- **A branding or place consultancy is commissioned to develop an**

appropriate brand. This should include evaluation of the current options as part of the commission

- **Following selection of the preferred brand, gateways, signage and marketing literature (hard and electronic) should re-enforce the message.**

Marketing

8.27 Following on from branding there needs to be co-ordinated activity to raise the profile of Rossendale as a tourism destination. There are already sufficient building blocks in place to warrant higher profile marketing and public relations activity.

8.28 It is recommended that:

- **The Visitor Economy/Tourism Forum, once established, should prepare and co-ordinate a Marketing Strategy that would therefore have input and buy-in from both the public and private sectors.**

Creative Industries

8.29 The creative industries sector is a growing element of Rossendale's local economy. It has the potential to contribute positively to the tourism offer in the way other locations have – for example Cumbria, Ruthin, St Ives.

8.30 In addition to promotional and marketing activity, there is scope to introduce physical workspace in a format that becomes a tourist/visitor attraction in its own right. The combination of gallery, exhibition, and retail space with craft or design workshops has worked elsewhere.

8.31 Art in the landscape is one of Rossendale's attractions and this could be used as a short-term measure through temporary visual improvements to undeveloped, derelict, dilapidated sites or buildings at key locations. An example of this approach is the Valley Centre frontage to Bank Street, where temporary hoardings have been erected.

8.32 Recommendations are:

- **Examine the feasibility of establishing craft/design workspace in conjunction with exhibition and retail facilities, to create a new visitor attraction**

- **Undertake a review of undeveloped or dilapidated sites and buildings to determine priorities for a programme of temporary visual improvements at key locations that extends the current art in the rural landscape into art in the urban landscape.**

Training

8.33 Personable skills are a prerequisite for all customer-facing staff across all sectors of the tourism economy. Yet skills development is not always seen as an area of investment by businesses be it for their employees or for themselves as owners. However, this is an aspect that can help to distinguish both businesses and a location and make a difference in attracting repeat visits. And, the study consultations identified the inherent friendliness of the local population as one of Rossendale's strengths.

8.34 In this respect, to make and sustain a difference, it is recommended that:

- **The Borough Council researches Further or Higher Education providers in Lancashire and Greater Manchester with a view to linking with one provider who will establish/develop a Rossendale orientated course, such as Welcome Host, that is customer focused and delivers skills development required for 'front facing' staff**
- **The Borough Council explores the opportunity to develop apprenticeships as part of the skills training programme to be established.**

Research and Monitoring

8.35 This study has confirmed the limited availability of up to date, good quality data about the numbers and profiles of visitors to Rossendale. In part this is due to the fact that many of the attractions are outdoor and free to access. However, it is important to have a greater understanding of the economic impact of the tourism sector in Rossendale. It will also help to promote new market opportunities, such as new accommodation provision, in the future.

8.36 Bearing this in mind it is recommended that:

- **The Visitor Economy/Tourism Forum should introduce and co-ordinate a regular, ongoing research programme to gather data on the structure and spend associated with the tourism sector in Rossendale.**

Action Plan

8.37 The above recommendations have been incorporated into the following Action Plan (Table 43). This identifies the lead Partner and supporting Partners for each of the actions.

KEY:

Action Plan – Tourism Policy
Action Plan – Tourism Sector Structure
Action Plan – Infrastructure
Action Plan – Marketing and Branding
Action Plan – Area Specific

Action Plan – Tourism Policy

Action	Activities	Report Reference	Lead Partner	Other Partners	Timescale, Short < 1 year Medium 1-3 years Long 3> years	Priority, High Medium Low
Promote and Secure Endorsement of the Tourism Study	Evidence base to underpin development of the LDF and other documents, such as the Tourism Study	N/A	RBC Forward Planning	RBC Economic Development RBC Tourism Officer LCDL	Short	High
Changes to LDF Core Strategy Planning Policy	Forward Planning to review Core Strategy sections 1-5 and consider amendments proposed in paragraph 8.2 Planning officers to review Core Strategy policies RLDF14 and 15 and consider suggested changes proposed in paragraph 8.6	Section 8, pages 150-152, paragraphs 8.2-8.6	RBC Forward Planning	-	Short Short	High High

Action Plan – Tourism Sector Structure

Action	Activities	Report Reference	Lead Partner	Other Partners	Timescale, Short < 1 year Medium 1-3 years Long 3> years	Priority, High Medium Low
Business Development						
Support the appropriate development and expansion of locally owned businesses in the leisure/tourism sector	Project development approach to engage attractions and infrastructure providers to deliver outcomes, on a 'Task and Finish' basis. General support to be provided in the LDF	Section 2, page 37, paragraph 2.89 (Rossendale Sustainable Community Strategy, Priority Outcome 12) Section 5, page 114, Table 35 (Rossendale Private Sector Proposals)	RBC Economic Development	RBC Tourism Officer Tourism/Visitor Economy Forum RBC Forward Planning/DC Private sector businesses LCDL Regenerate Pennine Lancashire L&BTB	Short	High/Medium
Tourism Structures, Staffing and Data Collection						
Establish a Tourism/Visitor Economy Forum. Establish Terms of Reference	Half yearly stakeholder events (to be topic specific) Agree and establish Terms of Reference for Forum Membership	Section 8, pages 152-153, paragraphs 8.7-8.10	RBC Tourism Officer	L&BTB LCDL Regenerate Pennine Lancashire Private sector businesses	Short Short	Low Low
Expansion of the Tourism/Visitor Economy Forum to include area specific Tourism Working Groups	Test demand via Tourism/Visitor Economy Forum membership Report at local level via Neighbourhood Forums, and seek their guidance on the required approach	Section 2, page 41, paragraph 2.102 (Rossendale Corporate Plan)	Tourism/Visitor Economy Forum RBC Tourism Officer	L&BTB LCDL Regenerate Pennine Lancashire Private sector businesses	Medium Medium	Low Medium
Review Departmental Co-ordination and Co-location of Tourism Sector related Staff Resources	Emerging opportunity due to Rossendale Borough Council restructuring	Section 8, page 153, paragraphs 8.11-8.12	RBC Corporate Management Team	-	Medium	Low
Introduce Data gathering Collation Programme	Annual Data Collection of all known tourism stock using the Lancashire Online Information System (LOIS) Annual Collection of 'How's Business' Survey	Section 8, pages 158-159, paragraphs 8.35-8.36	RBC Tourism Officer	Tourism/Visitor Economy Forum RBC Forward Planning RBC People and Policy Unit	Short	High

Action Plan – Tourism Sector Structure

Action	Activities	Report Reference	Lead Partner	Other Partners	Timescale, Short < 1 year Medium 1-3 years Long 3> years	Priority, High Medium Low
	data of all known tourism stock					
Strategy Preparation/Implementation						
Develop a Cultural Strategy	Complete production of the strategy	Section 2, page 42, Table 5 (Place Directorate Business Plan) Section 3, page 69, paragraph 3.96 (Rossendale Culture Review)	RBC Service Development Officer-Culture	RBC Economic Development Rossendale Partnership	Short	Medium
Preparation and co-ordination of a Tourism Strategy	Complete production of the strategy	Section 8, page 157, paragraphs 8.27-8.28	RBC Tourism Officer	Tourism/Visitor Economy Forum RBC Economic Development LCDL L&BTB Regenerate Pennine Lancashire Other public/private partners (to be determined by the Forum)	Short	High
Skills and Training						
Develop 'Rossendale Welcome Host' programme	Engage with businesses to take up this customer service training course	Section 8, page 158, paragraphs 8.33-8.34	RBC Economic Development	L&BTB Private sector businesses	Medium	Medium
Assess options for apprenticeships, generated by training programmes (including Rossendale Welcome Host)	Liaise with Lancashire County Council's apprenticeship programme and other offers to ensure that Rossendale takes future advantage of this offer	Section 8, page 158, paragraphs 8.33-8.34	RBC Economic Development	Accrington and Rossendale College Other FE or HE Providers Learning and Skills Council Private sector businesses	Medium	Low

Action Plan – Infrastructure

Action	Activities	Report Reference	Lead Partner	Other Partners	Timescale, Short < 1 year Medium 1-3 years Long 3> years	Priority, High Medium Low
Transport						
Redevelop/refurbish Rawtenstall Bus Station	Further public consultation on preferred location	Section 2, page 31, Table 2 (Core Strategy Area Visions)	RBC Economic Development RBC Forward Planning LCC	Rossendale Transport RBC other sections Other private sector partners	Long	High
Assess potential for joint bus-rail services and ticketing, providing links across Rossendale	Discuss with ELR and Rossendale Transport	Section 2, page 40, paragraph 2.98 (Draft Neighbourhood Plans) Section 6, page 129, paragraphs 6.63-6.64 Section 8, page 155, paragraph 8.18	RBC Economic Development	Rossendale Transport RBC LCC	Short	Low
Assess potential for joint bus-rail services and ticketing, providing links	Discussions with rail and bus service providers	Section 2, page 40, paragraph 2.98 (Draft Neighbourhood	RBC Economic Development	Rossendale Transport	Medium	Medium

Action Plan – Infrastructure						
Action	**Activities**	**Report Reference**	**Lead Partner**	**Other Partners**	**Timescale, Short < 1 year Medium 1-3 years Long 3> years**	**Priority, High Medium Low**
to Greater Manchester and West Yorkshire (Todmorden)		Plans) Section 8, pages 155-156, paragraphs 8.20-8.21		South Pennine Rail Partnership West Yorkshire PTE GMITA LCC		
Promote Commuter Rail Link using East Lancashire Railway	Promote as contributory solution to sustainable transport and easing of road traffic congestion within M66/M60 corridor	Section 2, page 37, paragraph 2.90 (Rossendale Sustainable Community Strategy) Section 3, pages 65-66, paragraphs 3.80-3.85 Section 6, page 129, paragraph 6.62 Section 8, page 155, paragraph 8.19	GMITA RBC Economic Development RBC Forward Planning East Lancashire Railway	LCC Rochdale MBC Bury MBC Network Rail Rail Operators DfT	Long	High
Accommodation						
Research, Produce and Promote Hotel Development Marketing Brochure	Compile market data, identify potential sites, and consider initial planning issues. Produce marketing brochure and proactively target budget (3*) hotel operators.	Section 8, pages 154-155, paragraphs 8.15-8.16	RBC Economic Development	RBC Tourism Officer RBC Forward Planning L&BTB	Medium	High
Research, Produce and Promote Unserviced Accommodation Development Opportunities Marketing Brochure	Compile market data, identify potential sites, and consider initial planning issues. Produce marketing brochure. Target YHA; Caravan Club; The Camping Club and Caravanning Club	Section 8, pages 154-155, paragraphs 8.15-8.16	RBC Economic Development	RBC Tourism Officer RBC Forward Planning L&BTB	Medium	High
Support appropriate accommodation proposals in key towns and along strategic footpaths/bridleways	Ensure appropriate policy identified in the Core Strategy to enable suitable activities and locations to be identified within the Site Allocations Development Plan Document.	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions) Section 2, page 28, paragraph 2.97 (Draft Neighbourhood Plans) Section 8, page 152, paragraph 8.6	RBC Forward Planning RBC Economic Development	RBC Tourism Officer Tourism/Visitor Economy Forum Private landowners, developers and operators	Short	High
Art/Culture						
Commission Feasibility Study for Craft/Design Workspace and Exhibition Centre, to create new visitor attraction	Prepare brief and secure funding for feasibility study. Work with Forward Planning to identify suitable location.	Section 3, pages 48-49, paragraph 3.15 Section 8, pages 157-158, paragraphs 8.29-8.32	RBC Economic Development RBC Service Development Officer-Culture	RBC Forward Planning LCDL Mid Pennine Arts Potential developers and operators Arts Council NW	Medium	Medium
Commission 'Art in the Urban Landscape' study to identify sites and buildings for prioritised programme of temporary visual improvements	Prepare brief and secure funding for feasibility study. Implement improvements to recommended sites/buildings	Section 8, page 158, paragraphs 8.31-8.32	RBC Economic Development RBC Service Development Officer-Culture	RBC Forward Planning/DC Land and property owners Civic Trust Arts Council NW	Long Long	Low Low
Countryside Access						

Action Plan – Infrastructure						
Action	**Activities**	**Report Reference**	**Lead Partner**	**Other Partners**	**Timescale, Short < 1 year Medium 1-3 years Long 3> years**	**Priority, High Medium Low**
Complete a series of easy to read and use walking/cycling maps	Explore funding potential for this idea	Section 2, page 43, paragraph 2.108 (Open Space Strategy for Rossendale)	RBC Tourism Officer LCC	Land and property owners Local walking/cycling groups	Medium	Medium
Improve the Rossendale Way with a series of coordinating way markers	To consider as part of signage programme to be tendered for commencement in October 2010	Section 2, page 43, paragraph 2.108 (Open Space Strategy for Rossendale)	RBC Economic Development LCC	Land and property owners Local walking/cycling groups	Short	Low
Work with landowners and other stakeholders to create a valley bottom bridleway/footpath from Rawtenstall	Explore potential with LCC Countryside Services	Section 2, page 43, paragraph 2.108 (Open Space Strategy for Rossendale)	RBC Economic Development LCC	RBC Forward Planning/DC Land and property owners Local walking/cycling groups Local residents	Long	Low
Implement Woodlands Improvement Project in LCC owned woodlands	Explore potential with LCC Countryside Services	Section 5, page 110, Table 33	LCC	RBC Economic Development RBC Forward Planning Local walking/cycling groups Local residents	Medium	Low
Sporting Attractions						
Support the expansion and enhancement of the Adrenaline Gateway	Ensure adequate reference in key planning documents (the Core Strategy and Site Allocations DPDs) Prepare brief and identify funding opportunities	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions) Section 2, page 33, paragraph 2.70 Section 5, pages 112-113, paragraphs 5.58-5.60	RBC Economic Development RBC Forward Planning LCDL	RBC DC Land and property owners Facility users Other private partners/investors	Short Short	High High
Support the expansion and enhancement of Ski Rossendale	Ensure adequate reference in key planning documents (the Core Strategy and Site Allocations DPDs) Prepare brief and identify funding opportunities and partners	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions) Section 6, page 120, paragraph 6.54	RBC Economic Development Private operator	RBC Forward Planning/DC LCDL Facility users Other private partners/investors	Short Short	High High
Other Infrastructure						
Implement the Markets Strategy	Implement recommendations in order to create busy and vibrant markets in Bacup, Haslingden and Rawtenstall	Section 2, page 39, Table 4 (Draft Neighbourhood Plans) Section 2, page 41, paragraph 2.101 (Rossendale Corporate Plan) Section 2, page 42, Table 5 (Place Directorate Business Plan) Section 3, page 72, paragraphs 3.111-3.113	RBC Market Managers	RBC Economic Development RBC Tourism Officer Tourism/Visitor Economy Forum Stallholders	Short	Medium
Strategic signage improvements across the district Additional directional signage, map signs in town centres locations and signage	To be implemented as part of signage programme to be tendered for commencement in October 2010	Section 5, page 110, Table 33	RBC Economic Development LCC	Groundwork	Medium	High

Action Plan – Infrastructure						
Action	**Activities**	**Report Reference**	**Lead Partner**	**Other Partners**	**Timescale, Short < 1 year Medium 1-3 years Long 3> years**	**Priority, High Medium Low**
for the Rossendale Way						

Action Plan – Marketing and Branding						
Action	**Activities**	**Report Reference**	**Lead Partner**	**Other Partners**	**Timescale, Short < 1 year Medium 1-3 years Long 3> years**	**Priority, High Medium Low**
Tourism Product Development linked to Thematic Market Segments	Continue to contribute to L&BTB marketing campaign Attendance at quarterly L&BTB Marketing Group meetings	Section 5, page 110, Table 34 Section 8, pages 153-154, paragraphs 8.13-8.14	RBC Tourism Officer	Tourism/Visitor Economy Forum L&BTB	Medium	Medium
Ongoing development of the Taste Lancashire/Taste International Brands	Continue to work with quality restaurants, cafes, tea rooms to enhance Rossendale's Food & Drink offer, and encourage the take-up of Taste Lancashire membership	Section 7, page 139, Table 40 Section 8, page 154, paragraph 8.14	RBC Tourism Officer	Tourism/Visitor Economy Forum L&BTB	Medium	Medium
Refined and enhanced events calendar, with key events in all main towns	Compile an annual key events diary and report attendance figures where possible. Support and attend meetings to assist with the delivery of key tourism events – one in each of the Neighbourhood Forum areas	Section 2, page 40, paragraph 2.97 (Draft Neighbourhood Plans) Section 5, page 111, Table 34 Section 8, pages 153-154, paragraphs 8.13-8.14	RBC Tourism Officer	Tourism/Visitor Economy Forum Neighbourhood Forums Whitworth Town Council	Short	Medium
Support the Rossendale Visitor Guide with local 'What's On' Guides	Produce an annual Visitor Guide, fully funded by private/public sector advertising sales Produce online quarterly downloadable 'What's On' Guides for each of the Neighbourhood Forum areas and one overall for Rossendale	Section 2, page 40, paragraph 2.97 (Draft Neighbourhood Plans)	RBC Tourism Officer	Tourism/Visitor Economy Forum Neighbourhood Forums Whitworth Town Council	Short	Medium
Joint Marketing/Tourist Information Point associated with East Lancashire Railway	Deliver the actions of the ELR and Joint Marketing Action Plan, and attend joint Marketing Group meetings	Section 8, page 155, paragraph 8.18	RBC Tourism Officer	East Lancashire Railway	Short	Medium
Commission Branding Review	Explore funding potential for a branding alignment project for Rossendale	Section 8, pages 156-157, paragraphs 8.22-8.26	RBC Economic Development	RBC Tourism Officer LCDL Regenerate Pennine Lancashire L&BTB	Medium	Low
Integration of preferred brand into gateways, signage and marketing literature	Continue using 'Heart of Rossendale' branding until a decision on the branding alignment for Rossendale is made.	Section 8, pages 156-157, paragraphs 8.22-8.26	RBC Economic Development	RBC Tourism Officer LCC LCDL Regenerate Pennine Lancashire	Long	Medium

Action Plan – Area Specific						
Action	**Activities**	**Report Reference**	**Lead Partner**	**Other Partners**	**Timescale, Short < 1 year Medium 1-3 years Long 3> years**	**Priority, High Medium Low**
Whitworth, Facit and Shawforth						
Enhance and improve the Pennine Bridleway and other local routes	Identify funding opportunities and work with partners to deliver	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions)	RBC Economic Development LCC	Land and property owners Local walking/cycling groups Whitworth Town Council	Medium	Low
Improve the maintenance of rural features, e.g. Cowm Reservoir	Identify where improvements are needed, prioritise these and Identify funding opportunities and work with partners to deliver	Section 2, page 39, Table 4 (Draft Neighbourhood Plans Tourism and Leisure Challenge – Suggested Actions)	RBC Economic Development	LCC Land and property owners Local walking/cycling groups Nature conservation groups Environment Agency	L:ong	Low
Market Whitworth to tourist type businesses, e.g. craft shops	Ascertain potential and work with the Town Council and local businesses to create a marketing strategy	Section 2, page 40, paragraph 2.97 (Draft Neighbourhood Plans)	RBC Tourism Officer Whitworth Town Council	Tourism/Visitor Economy Forum (local group)	Short	Low
Consider development of a historic centre for Whitworth	Continue work on Whitworth Square Conservation Area, including the management plan, and consider creation of additional Conservation Areas where appropriate.	Section 2, page 40, paragraph 2.97 (Draft Neighbourhood Plans)	RBC Conservation Team Whitworth Town Council	RBC Economic Development Land and property owners Tourism/Visitor Economy Forum (local group) Civic Trust English Heritage	Long	Low
Develop a sculpture trail through Whitworth, with links to the Irwell Sculpture Trail	Discuss with partners and identify sources of funding	Section 5, page 110, Table 33	Whitworth Town Council IST Partnership - Bury MBC, Salford City Council, LCC (and RBC)	RBC Economic Development Land and property owners Tourism/Visitor Economy Forum (local group) Mid Pennine Arts Arts Council NW Civic Trust	Medium	High
Bacup, Stacksteads, Britannia and Weir						
Support local events such as the Folk Festival, Bacup Carnival	Support and attend meetings to assist with the publicity and delivery of key tourism events – including identifying any sources of funding	Section 2, page 39, paragraph 2.94 (Draft Neighbourhood Plans)	RBC Tourism Officer Tourism/Visitor Economy Forum (local group)	Local businesses/voluntary groups	Short	High
Enhance Stubbylee Park as a visitor attraction	Activities to be determined by the Cultural Strategy	Section 2, page 39, Table 4 (Draft Neighbourhood Plans) (Tourism and Leisure Challenge – Suggested Actions)	Rossendale Partnership Cultural Board	RBC Parks Officers RBC Economic Development RBC Tourism Officer RBC Forward Planning Tourism/Visitor Economy Forum (local group)	Long	Low
Develop a cycle route from Whitworth to Rawtenstall, via the Adrenaline Gateway	Continue work on implementing this scheme	Section 2, page 39, Table 4 (Draft Neighbourhood Plans) (Tourism and Leisure Challenge – Suggested	RBC Economic Development LCC	RBC Forward Planning/DC LCDL Land and property owners	Medium	Medium

Action Plan – Area Specific						
Action	**Activities**	**Report Reference**	**Lead Partner**	**Other Partners**	**Timescale, Short < 1 year Medium 1-3 years Long 3> years**	**Priority, High Medium Low**
		Actions)		Local walking/cycling groups Whitworth Town Council		
Local enhancement of the Irwell, to provide an attractive visitor destination	Identify where enhancements are necessary and advisable and prepare action plan of how this can be delivered	Section 2, page 39, Table 4 (Draft Neighbourhood Plans) (Tourism and Leisure Challenge – Suggested Actions)	RBC Economic Development	RBC Forward Planning/DC/ Streetscene/Conservation Team Natural England Environment Agency Land and property owners Groundwork Local walking/cycling groups Nature conservation groups	Medium	Medium
Support local opportunities for tourism and leisure related employment	Policies in Core Strategy and other documents in the LDF to encourage new opportunities. Business help to be provided where possible and subject to funding availability	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions)	RBC Economic Development	RBC Forward Planning/DC/Streetscene RBC Tourism Officer Tourism/Visitor Economy Forum (local group) Local businesses/voluntary groups Civic Trust	Long	High
Enhance and promote access to countryside and local attractions	Promote countryside, accommodation, attractions and Taste Lancashire collectively with online and offline promotional material, giving an overall visitor information service.	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions)	RBC Economic Development LCC	RBC Tourism Officer RBC Forward Planning/DC Tourism/Visitor Economy Forum (local group) Local businesses/voluntary groups Land and property owners Local walking/cycling groups	Long	High
Implement existing plans to improve public realm, access and gateways	Identify possible funding opportunities to implement Action Plan	Section 5, page 114, Table 36	RBC Economic Development LCC	RBC Forward Planning/DC Land and property owners Local businesses/voluntary groups Local residents Civic Trust Townscape Heritage Initiative	Medium	High
Waterfoot, Cowpe, Lumb and Water						
Support appropriate leisure, recreation and infrastructure provision within the smaller settlements	Through the Core Strategy and other documents in the LDF and Action Plans	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions)	RBC Forward Planning RBC Economic Development/ Communities	RBC DC Tourism/Visitor Economy Forum (local group) Land owners, developers and operators	Long	Medium
Improve access (including signage) to the countryside and local tourist and leisure attractions	Through Core Strategy and other documents in the LDF and Action Plans, and working with partners to identify funding opportunities	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions)	RBC Economic Development LCC	RBC Tourism Officer RBC Forward Planning/DC Tourism/Visitor Economy Forum (local group) Local businesses/voluntary groups Land and property owners	Long	High

Action Plan – Area Specific						
Action	**Activities**	**Report Reference**	**Lead Partner**	**Other Partners**	**Timescale, Short < 1 year Medium 1-3 years Long 3> years**	**Priority, High Medium Low**
				Local walking/cycling groups		
Rawtenstall, Crawshawbooth, Goodshaw and Loveclough						
Support the redevelopment of the Valley Centre as a mixed use project	Through Core Strategy and other documents in the LDF. Identify and work with partners to deliver the redevelopment. Implement Masterplan recommendations, where appropriate	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions) Section 2, page 40, paragraph 2.97 Section 6, page 126, paragraph 6.47	RBC Economic Development RBC Forward Planning Private developer	Other private partners, including potential occupiers	Medium	High
Support the redevelopment of New Hall Hey	Core Strategy and other documents in the LDF, active marketing, liaison with the Administrators	Section 2, page 40, paragraph 2.97 Section 3, page 67, paragraph 3.89	RBC Forward Planning RBC Economic Development Private developer/administrator	LCDL Administrators Other private partners, including potential occupiers	Short	High
Implement the New Hall Hey/Rawtenstall Station/Valley Centre Public Realm Scheme	Continue this work and identify sources of funding as NWDA funding now unlikely	Section 5, page 114, Table 36	RBC Economic Development RBC Forward Planning	Hall Hey/Valley Centre owners/developers Other land and property owners RBC DC Groundwork Civic Trust	Medium	High
Develop new cycling/bridleway routes, in particular along Limey Water. Improve and promote existing routes	Identify funding opportunities and work with partners to deliver	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions) Section 2, page 40, paragraph 2.97	RBC Economic Development/Forward Planning LCC	RBC Tourism Officer RBC Forward Planning/DC Tourism/Visitor Economy Forum (local group) Land and property owners Local walking/cycling groups	Long	Low
Improve Rawtenstall Station facilities and physical/public transport links (including signage) to Rawtenstall Town Centre	Identify and prioritise where action is needed and identify funding opportunities and work with partners to deliver	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions) Section 2, page 39, Table 4 (Draft Neighbourhood Plans) Tourism and Leisure Challenge – Suggested Actions) Section 8, page 155, paragraph 8.18	RBC Economic Development/Forward Planning East Lancashire Railway	RBC DC RBC Tourism Officer Tourism/Visitor Economy Forum (local group) Groundwork Private landowners Heritage bus operator Rossendale Transport LCDL Civic Trust English Heritage LCC Highways	Short	High
Implement the emerging Rawtenstall Town Centre Masterplan, improving physical/public transport and public realm across the Town Centre	Through the Local Development Framework, and taking forward actions identified in the masterplan, identifying funding	Section 2, page 40, paragraph 2.97	RBC Economic Development/Forward Planning	RBC DC RBC Tourism Officer Tourism/Visitor Economy Forum (local group) East Lancashire Railway Groundwork	Long	High

Action Plan – Area Specific						
Action	**Activities**	**Report Reference**	**Lead Partner**	**Other Partners**	**Timescale, Short < 1 year Medium 1-3 years Long 3> years**	**Priority, High Medium Low**
				Private landowners Local businesses Heritage bus operator Rossendale Transport Civic Trust Townscape Heritage Initiative		
Engage with Rawtenstall Town Centre businesses to improve linkages with East Lancashire Railway	Continue to engage with Rawtenstall Chamber of Commerce to encourage businesses to work with the ELR, main tourist attractions and key events e.g. 1940s Wartime Weekend/ implementation of the Rawtenstall Masterplan	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions) Section 3, page 68, Table 13 (Tourism Marketing Plan for Rossendale) Section 8, page 155, paragraph 8.18	RBC Tourism Officer RBC Economic Development	East Lancashire Railway Local businesses Chamber of Commerce Tourism/Visitor Economy Forum (local group)	Short	High
Consider options for a community cinema	Appraise success of Bacup pilot scheme	Section 2, page 40, paragraph 2.98	RBC Tourism Officer RBC Communities Team	RBC Communities Team Tourism/Visitor Economy Forum (local group) Local community/voluntary groups	Medium	Low
Review of Rossendale Museum arrangements	Await outcomes of the Review and deliver recommended actions.	Section 2, page 42, Table 5 (Place Directorate Business Plan)	RBC Tourism Officer LCC Museums Service	-	Short	Low
South West Rossendale						
Improve marketing, signage and interpretation boards along the Irwell Sculpture Trail (IST). Develop links with other local walking/cycling routes.	Identify funding opportunities and work with partners to deliver	Section 5, page 110, Table 33	Salford City Council	IST Partnership - Bury MBC, Salford City Council, LCC (and RBC) Arts Council NW Mid Pennine Arts RBC Service Development Officer-Culture RBC Tourism Officer RBC Economic Development Land and property owners Local walking/cycling groups ('Friends of the Trail' members)	Medium	Low
Preserve and enhance local heritage, including the Irwell Vale and Chatteron/ Strongstry Conservation Areas	Continue with developing the Conservation Area Appraisal and Management Plan. Through delivery of the Council's LDF.	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions)	RBC Forward Planning/DC / Conservation	Land and property owners Local businesses Civic Trust English Heritage Townscape Heritage Initiative	Long	Low
Improve public realm and gateways	Identify and prioritise where action is needed and identify funding opportunities and work with partners to deliver	Section 2, page 40, paragraph 2.99	RBC Economic Development	RBC Forward Planning/DC Land and property owners Local businesses Civic Trust	Long	Medium
Haslingden and Rising Bridge						

Action Plan – Area Specific						
Action	**Activities**	**Report Reference**	**Lead Partner**	**Other Partners**	**Timescale, Short < 1 year Medium 1-3 years Long 3> years**	**Priority, High Medium Low**
Develop and implement plans to improve public realm, signage and access to local attractions. Consider options for a park 'n' ride	Identify funding opportunities and work with partners to deliver	Section 2, pages 30-32, Table 2 (Core Strategy Area Visions) Section 2, page 40, paragraph 2.99 Section 5, page 114, Table 36	RBC Economic Development	RBC Forward Planning/DC Land and property owners Local businesses/voluntary groups Civic Trust	Long	Medium
Explore the possibility of a local culture festival	Support and attend meetings to assist with the delivery of key tourism events.	Section 2, page 40, paragraph 2.99	RBC Service Development Officer-Culture	RBC Tourism Officer Tourism/Visitor Economy Forum (local group) Local community/voluntary groups	Long	Medium
Work with LCC and other stakeholders to complete the cycleway between Rising Bridge and Stubbins.	Identify funding opportunities and work with partners to deliver	Section 2, page 43, paragraph 2.108 (Open Space Strategy for Rossendale)	RBC Economic Development LCC	RBC Tourism Officer RBC Forward Planning/DC Tourism/Visitor Economy Forum (local group) Land and property owners Local walking/cycling groups	Medium	Low
Develop a bridleway, following the path of the former Helmshore to Ramsbottom Railway, with links to the Irwell Sculpture Trail/National Cycle Paths	Identify funding opportunities and work with partners to deliver	Section 5, page 110, Table 33	RBC Economic Development LCC	RBC Tourism Officer RBC Forward Planning/DC Tourism/Visitor Economy Forum (local group) Land and property owners Local walking/cycling groups	Long	Low

Appendix 1

Venue and Event Database

Appendix 2

Business Survey Questionnaire

Appendix 3

Workshop, Key Comments

Appendix 4

Venue and Event Location Maps

Appendix 5

Business Survey Results

Appendix 6

Stakeholder Consultations

Appendix 7

Economic Analysis