

A Proud History



1. Introduction

This section examines the socio-economic impact of the East Lancashire Railway (ELR) on the local and regional economy.

The assessment is based on the use of secondary information combined with operational data provided by the ELLR Company and visitor survey research undertaken by Jane Saxon and Associates in September 2008.

The impact assessment examines the direct impact of ELR as an employer and focus for community activity, its indirect impacts as a purchaser of goods and services and as an attractor of visitors to the area, and finally its influence on development in the Irwell Valley.

These impacts combined provide a sense of the way ELR contributes towards the well-being of the local economy, its communities of volunteers and residents, as well as its role as a major attraction in the North West region.



2. Overview of ELR's Socio-Economic Impacts

The original objectives of the ELR were to:

- create a quality visitor attraction of regional importance; and
- contribute to the regeneration of the Irwell Valley from Rawtenstall to Bury and via the recent extension to Heywood in Rochdale.

Between 1984 and 2008 the organisation secured £8.72 million of public investment (excluding the recent investment of £2.7m in the Transport Museum redevelopment programme). This equates to an annual investment of £348,880 towards fulfilling the aims of the ELR Trust.

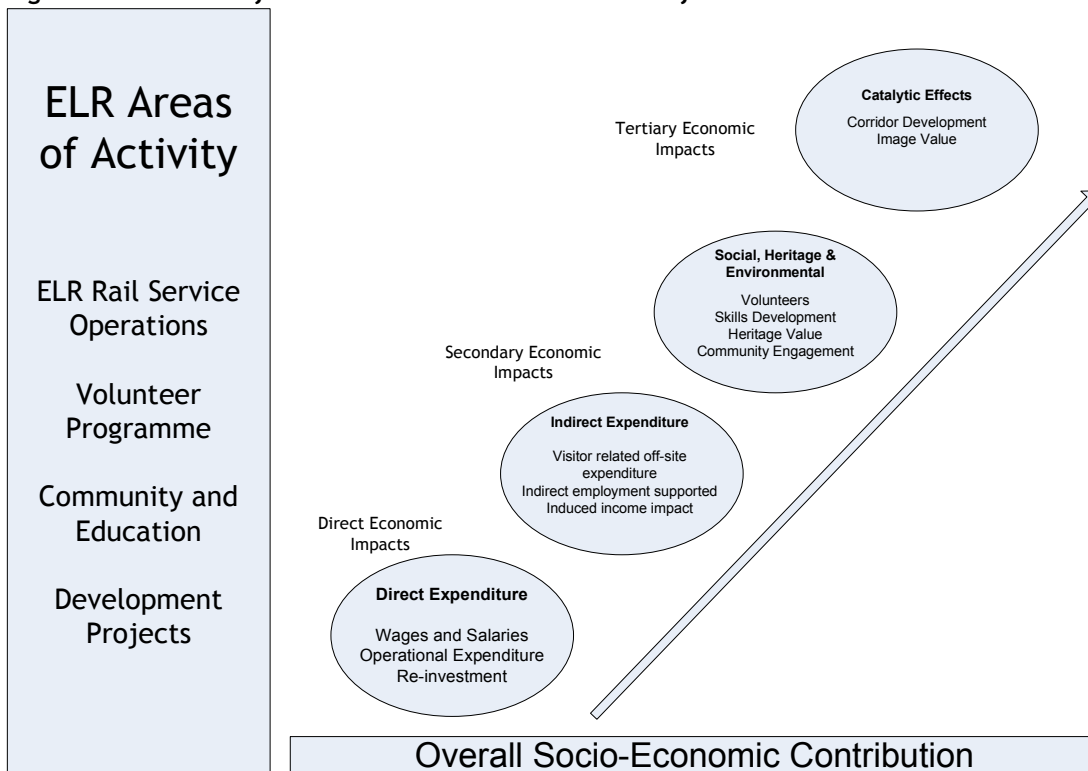
The main investment has been directed at line acquisition, restoration of its 46 major bridges and other structures, permanent way and signalling and the development of stations and other tourism infrastructure. The main sources of funding have been the Northwest Regional Development Agency (and its predecessors), the European Commission, the ELR Trust partners (ELLR Company, Bury Council, Rochdale Council and Rossendale Council), the Heritage Lottery Fund and local landfill tax companies (BIFFA, Pilsworth).

The ELR has contributed to the local and regional economy over a period of 20 years by directly attracting visitors to the area, purchasing goods from local and regional companies and generating wider social, economic and environmental benefits, in particular through its catalytic impacts along the Irwell Corridor.

The range of socio-economic impacts that arise from the activities of the ELR are summarised diagrammatically in Figure 2.



Figure 2: Overview of the socio-economic contribution of ELR



The rest of this section examines the quantifiable and non quantifiable benefits across the range of economic, social and environmental benefits outlined above.



3. ELR Direct Economic Impacts

The ELR Trust was formed in 1984 and the 9-mile Bury to Rawtenstall section of the ELR line was acquired in 1985. After completion of the initial reclamation works, 1987 saw the first stage opening of the line between Bury and Ramsbottom while the second section of the line was opened in 1991 to Rawtenstall.

The scale of reclamation works required for the Bury to Heywood extension was significantly more challenging but this section opened in 2003 providing a total network covering 13 miles connecting the Irwell and Roch Valleys across the three local authority areas of Bury, Rochdale and Rossendale.

Since the establishment of the ELR the number of visits to the attraction has grown consistently over the period to 2003, with a maturing over the last few years at around 108,000 (see Figure 3 for the visitor growth profile). Although visits to the railway have been strong relative to other attractions in the North West, the performance has been static for the last few years.

The 108,000 visitors can be broadly split into core visitors (c.35,000) and those attending the special events such as the Santa Specials and a Day Out with Thomas (c.73,000).¹

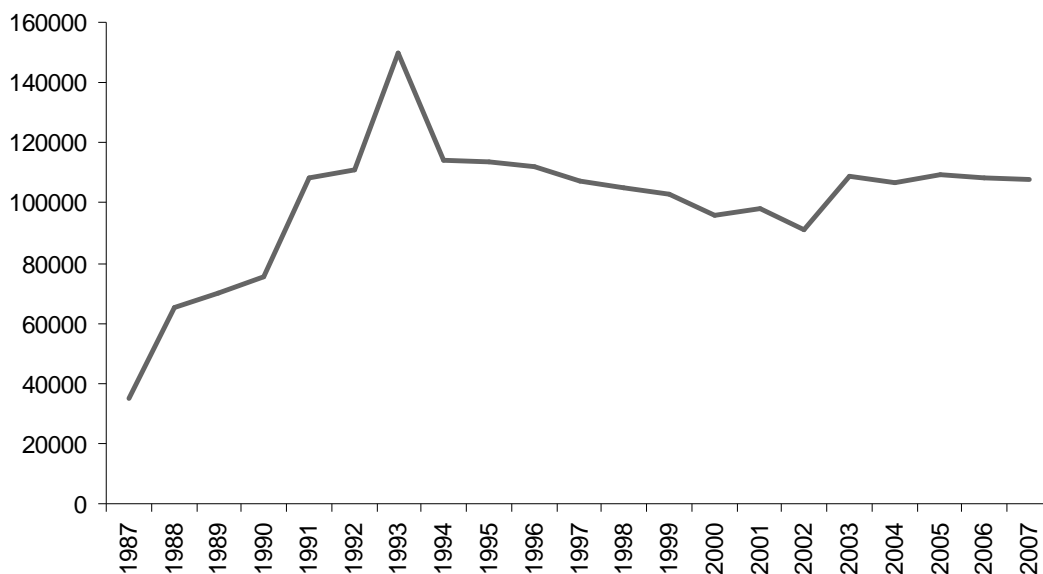
The direct economic impacts of this scale of business activity can be measured by examining ELR's operational expenditure on (i) directly employing staff, and (ii) buying in goods and services from firms based in the local area and region.

ELR direct 'on site' expenditure in 2006/07 was £1,466,000 of which £343,000 went on salaries and £1,123,000 on goods & services bought in (GSBI). Between April 2007 and March 2008, the on site expenditure figure was £1,728,000 of which £429,000 was for wages & salaries and £1,299,000 on external purchases.

¹ This segmentation is based on an analysis of ELR's ticketed sales data.



Figure 3: Sharp growth in visits followed by a 'levelling out' at around 100,000



Source: ELLR internal data

Note: The significant peak in 1993 was as a result of the Steam Festival at Buckley Wells celebrating the end of steam on British Rail.

3.1 ELR direct expenditure

Of the total operational costs between April 2007 and March 2008 of £1,728,000 (excluding depreciation), the wages & salaries figure of £429,000² directly supported paid employment of 20 FTEs. This also includes the casual and hourly paid staff in the Trackside Pub.

The average on site expenditure per visitor in 2007/08 was £11.20, up slightly on the 2006/07 figure of £10.80.³ This figure is made up of all visitor related income (tickets, events, retail, pub, on-board catering).⁴

3.2 ELR expenditure on goods & services

The geographical profile of ELR's expenditure with suppliers has been examined using the ELR purchasing database.⁵

² This includes an exceptional amount of £74k in meeting contract work undertaken by ELR.

³ The ELR accounts for 2007/08 show £1,206,423 of income from standard fares, specials, Red Rose diners, buffet sales, trackside and related income. The figure divided by 107,950 visitors gives an average expenditure of £11.20.

⁴ The data on ticket sales for core and special events shows an average price of £8.74 (including the Red Rose diners).

⁵ The supplier database recorded purchases of some £1.9m. This value of purchases has been used to estimate the percentages by broad area using the recorded billing address post codes.



Analysis of the database showed that 61% of GSBI is estimated to have been purchased from suppliers within the North West region, and 25% of total purchases are placed with suppliers within the local area (defined as including Bury, Rossendale and Rochdale).

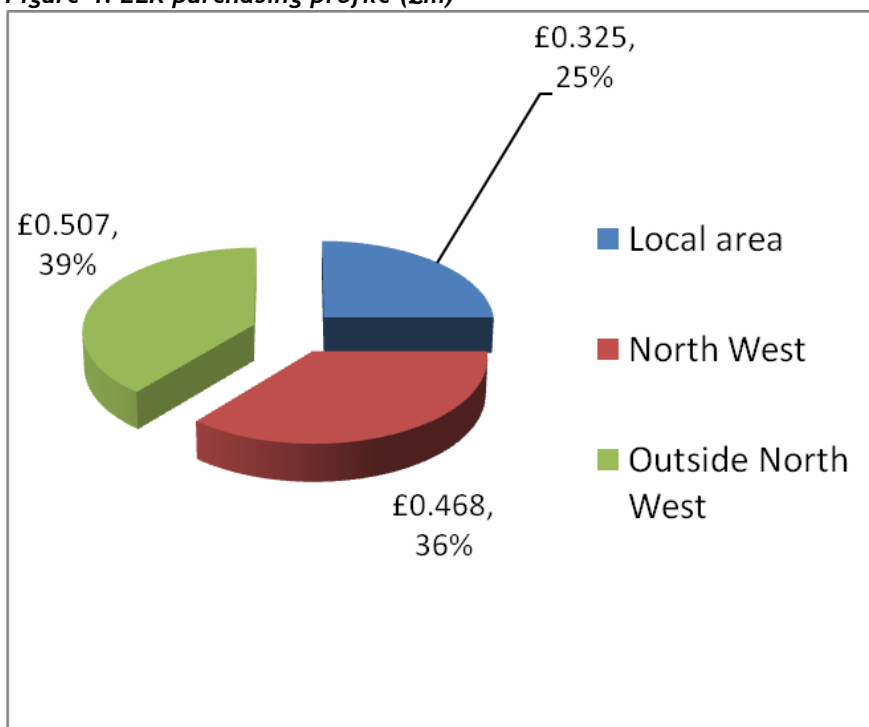
In the year to March 2008 ELR spent £1,299,000 on goods & services bought in (GSBI).⁶

Applying the percentages to the GSBI in 2007/08 provides an estimate of the annual injection into the local and regional economies. In the last financial year:

- £320,000 was injected into the local economies of Bury, Rochdale and Rossendale. Local suppliers include important relationships established in technical engineering services, as well as catering and general services. Some 86% of this expenditure was with firms in the Bury area.
- £792,000 of ELR purchases were made with suppliers in the North West region.

Figure 4 provides an overview of the geographical spread of ELR's supplier base.

Figure 4: ELR purchasing profile (£m)



Source: ELLR purchasing records 2008

Annually therefore ELR is a significant purchaser of goods and services and nearly 60% of purchasing requirement is met by firms in the local area and the North West region.

⁶ The ELR operational accounts for 2007/08 indicate that purchases for the shops, equipment & premises, overheads amounted to £1.299m.



4. ELR Secondary Economic Impacts

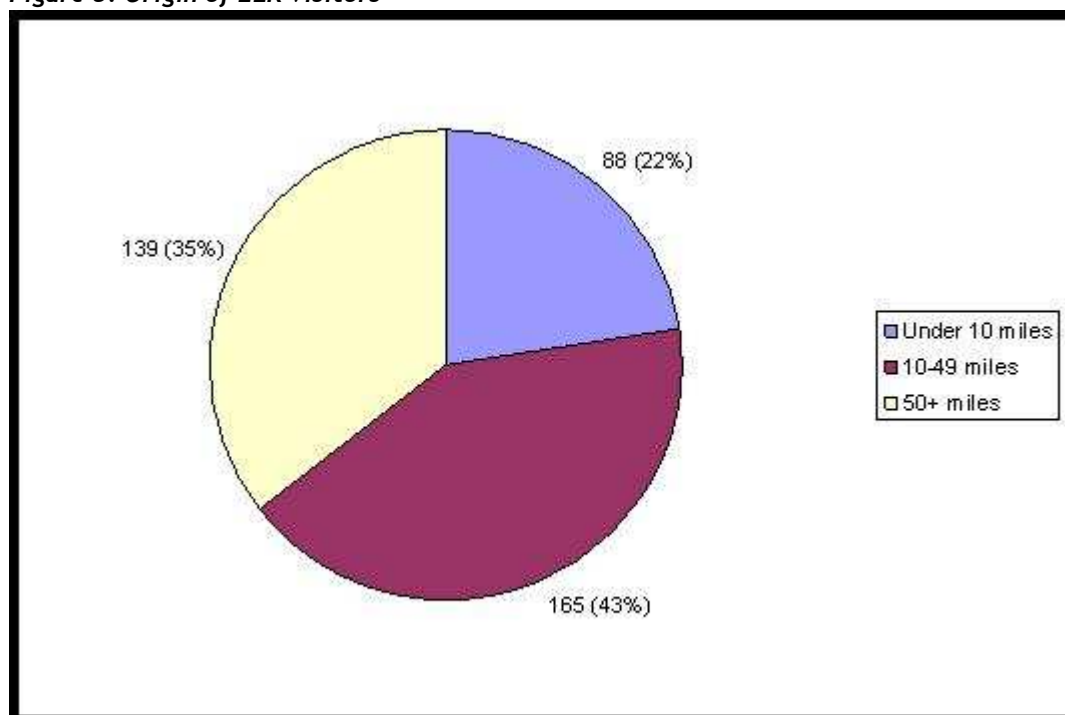
The secondary impacts of ELR primarily relate to the ‘off site’ impacts of the 108,000 visits made to the area. These impacts vary according to the type of visitor (core or special event), the origin of visitors (within or outside the local area) and the length of their stay in the area (i.e. whether a day or overnight visitor).

The profile of the 35,000 core visitors is based on the Jane Saxon & Associates (JSA) Survey conducted over the summer 2008. The profile of the 73,000 special events visitors is based on a survey conducted in 2007 of the Santa Special event.

4.1 Visitor profile - core customers

In 2008, JSA conducted a survey into the railway’s core customers (i.e. users of the core service) and the nature of their visit to the line and Irwell Valley. The survey found that 22% of users of the railway came from within a 10 mile radius, with 43% travelling between 10-49 miles and 35% in excess of 50 miles (Figure 5).

Figure 5: Origin of ELR visitors



Source: Jane Saxon Associates 2008

Other key findings from the survey included:

- **Day visitors:** Of the 275 respondents, 76% said that they were on a day trip from home whilst 24% were visiting from a place other than their usual residence.



- **Overnight visitors:** Of the 139 respondents travelling in excess of 50 miles, there were 34 (24%) that were staying overnight in the area - all of which were for 2 nights or more.
- **Accommodation used:** Of the 117 respondents that specified where they would be staying, 39% were staying with friends and 38% in a hotel. Caravanning was also a significant percentage, with 12% choosing to stay on caravan and camp sites.

Postcode analysis of the core visitors provides a more detailed picture of the origin of visitors by key geographical areas; (i) the local area, (ii) rest of the North West and (iii) from outside the North West.

The analysis indicated that 18.5% of visitors are from the local area (defined as residents of the three local authorities), 47.5% are from the sub-region and some 34% from outside the North West region. The survey also found that:

- Of the total visitors surveyed, some 31% came from the Greater Manchester sub region and 21% from the Lancashire sub region.
- Of those from outside the region, the largest proportion of visitors came from the South East (10%) and the West Midlands (6%).

4.2 Visitor profile - special events

A survey conducted in 2007 into visitors to the **Santa Special event** showed that the profile of visitors is more local than for the core product.

Of the event visitors, 25% came from the local area whilst 69% came from the rest of the North West. Just 6% of visitors came from outside the region.

4.3 Combined Visitor Profile

Figure 6 shows the number of visitors by area of origin for all visitors (core and special event).

Across all visitor market segments, 23% come from the local area (Rochdale, Bury and Rossendale) with the majority (62%) from the rest of the North West. A significant number of people, 16,277 (or 15% of the total) come from outside the region. Of these, nearly a quarter are making an overnight stay.



Figure 6: Baseline Visitor Profile

Visitor profile	Core Visitors	Special events	Total
Local economy area	6,475	18,238	24,713
Rest of the region	16,625	50,336	66,961
Outside the North West region	11,900	4,377	16,277
Total	35,000	72,950	107,950
Overnight stayers	2,856	1,007	3,863

Source: Jane Saxon Associates 2008 and Santa Survey 2007.

It is possible from the survey data to estimate how many visitors are coming to the railway from each local authority. There are a number of limitations with this data and the following numbers are to be used as a rough indicator only.

- **Bury:** 13,671
- **Rochdale:** 6,421
- **Rossendale:** 4,621

4.4 Visitor off site expenditure

The Jane Saxon & Associates survey asked visitors about their expenditure in the area, linked to their visit. The information supplied was provided in expenditure bands and does not therefore provide an average expenditure per group or per person. However, if the mid point in each band is taken, the average visitor off site expenditure on food and drink, car parking and other items was £12.76. When on site expenditure including ticket purchase is added, the average expenditure per person is £23.15.

Average expenditure made by visitors to special events however is significantly lower. The average on site and off site expenditure figure for event visitors was £9.37, of which £6.08 was spent on site (including ticket purchase).

The core visitor survey average expenditure figures are slightly above (+6%) the average visitor expenditure figures for Bury found in the STEAM data.⁷

To provide the best estimate of off site visitor expenditure, we have used a combination of evidence from the three surveys as follows:

⁷ Scarborough Tourism Economic Model (STEAM) is a system used by many Local Authorities, including those in East Lancashire, to calculate the volume and value of tourism within Authority areas. STEAM data for Bury reported an average day visitor direct on and off site expenditure of £21.90 in 2006 or c22.50 in 2007 after applying 3% for inflation. If the average on site expenditure of £11.20 is added to the average off site expenditure of £12.76 from the JSA survey, this gives an estimated on and off site average of £23.96 slightly above the STEAM 2007 estimate. Using the same method in comparing the Santa special gives an average of £14.50 (£11.20 on site and £3.30 off site).



- **Day visitors from outside the local area:** a daily off site average expenditure of **£13** is based on the JSA survey of core service visitors.
- **Day visitors within the local area:** an average off site expenditure of **£3.30** is used, based on 2007 Santa Survey event visitors.
- **Staying visitors:** a staying visitor off site average expenditure of **£43** is used based on STEAM average expenditure figures.



Figure 7: Off site direct expenditure

Visitor profile	Visitor numbers	Average off site expenditure per day £	Total off site expenditure £
Local economy area	24,713	3.30	81,551
Rest of the region	66,961	13.0	870,487
Outside the region	11,408	13.0	148,304
Overnight stayers	4,869	43.21	303,462
Total	107,950	13.0	1,403,804

Source: Jane Saxon Associates 2008 and Locum Consulting

The total off site expenditure therefore is estimated at **£1.404m**. Of this, **£0.45m** is attributable to visitors from outside the region and visitors staying overnight in the area.

4.5 ELR overall expenditure impacts

The direct on and off site expenditure will result in further effects in the local and regional economy. These impacts are known as the indirect (supply chain) and induced (income) effects. The STEAM data for Bury generates an indirect and induced expenditure multiplier of 1.58, whilst for the region the multiplier figure is estimated at 1.46.⁸

Applying the appropriate local or regional multiplier to the direct expenditure impacts on and off site (after taking account of leakage of expenditure in the form of wages & salaries, goods and services purchased by ELR & off site expenditure) enables an estimate of the total direct, indirect and induced impact. The results for the local and regional level are shown in Figure 8⁹.

Figure 8: Total employment and expenditure impacts (£m)

Indicator	Local level	Regional level
On site expenditure - wages & salaries	0.355	0.355
On site expenditure - supply chain	0.325	0.792
Off site expenditure ¹⁰	1.052	1.263
Sub total	1.732	2.410
Indirect & induced effect	0.797	1.108
Total expenditure	2.529	3.518
Employment impact	55	70

Source: Locum Consulting

The total expenditure at local level is **£2.5m**. Expenditure at regional level is **£3.5m**.

⁸ The higher implied multiplier at the local level compared to the regional level is unusual and is subject to confirmation from the provider of the Bury STEAM data (GTS).

⁹ The results include local resident expenditure (i.e. there is deduction for displacement).

¹⁰ It is assumed that 75% of off site expenditure is with firms in the local economy and 90% at the regional level.



This supports some **55** (direct, indirect & induced) jobs within the local economy and **70** jobs across the region¹¹.

4.6 Distribution of impacts

The JSA visitor research showed that the majority of visitors started their journey at Bury and Rawtenstall. The survey also showed that most of the visitors wanted to get off at Rawtenstall, Ramsbottom and Bury, but very few at the more recently opened Heywood Station or the countryside stations at Summerseat Halt and Irwell Vale.

The survey also found that whilst riding on the train was the main motivation of visitors to the railway, 13% specified that it was a route to access places along the track. Bury and specifically Bury Market was the largest draw for those that said they took the train to visit a place. Rawtenstall and Ramsbottom were also popular choices amongst the 58 respondents.

These factors will undoubtedly have an impact on the distribution of expenditure with Bury, Rawtenstall and Ramsbottom likely to be benefiting most from visitors at present.

¹¹ The average expenditure required to support 1 full time employee in the tourism sector in 2006 was £62,970 - based on STEAM data for Bury.



5. Tertiary Impacts

5.1 Volunteers

The ELR volunteer network is extensive and currently stands at 544 active volunteers and a further 4,000 members of the Preservation Society. The volunteer working members of the East Lancashire Preservation Society have provided the majority of the workforce since the railway was opened in 1987.

An examination of the May 2008 volunteer time sheets hours indicates that the volunteer workforce provides the equivalent of 59 FTE posts (excluding Trustees). From the timesheet data, it appears that 60% of volunteers are carrying out skilled or technical duties whilst 40% are carrying out more general duties such as selling tickets, visitor services, cleaning and working in the shop.

Figure 9 summarises the annual value of the hours worked by volunteers for 2008. The equivalent salaries have been taken from the Office for National Statistics website (Directors' salaries) and the Institute for Volunteering Research recommended wages (general duties and Trustees' salaries).

Figure 9: Volunteer Workforce Value

Skill Grade	FTE	Equivalent Annual		Value
		Salary	Including On-Costs	
General Duties	21	£13,000	£15,600	£327,600
Skilled/Management Duties	32	£22,568	£27,082	£866,611
Directors	6	£38,287	£45,944	£275,666
Total	59			£1,469,878

It is also possible to put a value on the time committed by the Trustees. This is illustrated in Figure 10.

Figure 10: Trustee Value

Skill Grade	Posts	Equivalent Value inc.	
		On-Costs	
Trust Chair	1	£25,200	
Trustee	11	£66,000	
Total	12	£91,200	

Using the above values for technical and general volunteer inputs provides an estimated value of **£1.561m**.



The Volunteer Investment Value Audit (VIVA) recommends that an important measurement of volunteer value can be seen by calculating the ratio of the value of volunteer time to the costs of supporting the volunteer programme. The ratio for ELR is **60:1**¹². This compares very favourably to the ratio for most UK charities of between 1.3 and 13.5 to 1 and an average ratio of 8:1¹³. One of the reasons for the very efficient ratio is the fact that the Railway uses volunteers to manage the wider volunteer network. According to research undertaken by the Institute for Volunteering Research, only 7% of organisations operate in this way, with most relying on paid staff to undertake such responsibilities.

The volunteer network provides a range of skills from operations through to administration. Skills include: civil engineers, carriage & wagon fitters, joiners, plumbers, electricians, drivers (diesel and steam), firemen, painters, mechanical engineers, bricklayers, stonemasons, locomotive fitters, signalmen, administration, marketing, retail and station operations. Some volunteers have the required Network Rail operational skills.

Volunteers are drawn from across the region. 30% of the volunteers are from the local area (Bury, Rochdale and Rossendale) with a significant representation from Manchester, South Manchester and Lancashire. Figure 11 illustrates the geographical reach of the volunteer network.

70% of volunteers were born before 1960 and 30% before 1945. 12% were born after 1980.

An example of the skill and commitment of the volunteer network can be seen from the refurbishment of the Bury South signal box and associated works. This project was undertaken by volunteers, saving ELR an estimated £5m at commercial rates.

¹² Based on 2007 costs to the ELR Trust of £14,927 and ELLR Company costs estimated at £10,000.

¹³ Average figures taken from research produced by the Institute for Volunteering Research.



Figure 11: ELR volunteer network reach

<i>Postcode Area</i>	<i>% of Volunteers</i>
Bury	17%
Manchester	16%
Altrincham/Cheshire	10%
Leeds	10%
Rochdale	7%
Bolton	6%
Preston/Chorley	5%
Rossendale	5%
Stockport	5%
Liverpool/Wirral	4%
Blackburn/Burnley	3%
Huddersfield/Halifax	2%
Other Areas	10%
Uncoded	9%

Source: ELR internal data

5.2 Community engagement

The community value of the East Lancashire Railway is extensive.

One obvious impact can be seen through the 1,952 educational visits made by over 40 schools in the local area and conurbation. Educational visits of this nature are recognised as adding value to formal education provision, enhancing classroom learning, supporting delivery of the national curriculum and providing children with opportunities to develop social and other skills.



There are however undoubtedly a range of other community benefits which are being delivered by the Railway which are more difficult to quantify but are nonetheless very significant.

Perhaps the most obvious impact is the improvement to the environment which has been delivered by the organisation restoring and maintaining the track, the stations and the supporting infrastructure. It is difficult to assess what would have happened to the all parts of the railway if the Trust and the Company had not undertaken the restoration and refurbishment. It is unlikely, however, that alternative fragmented uses would have



delivered the same positive impacts on the urban and rural environment in East Lancashire.

Throughout the late 1980's the ELR performed a very useful role in partnership with the Manpower Services Commission in providing training for local unemployed people in the North Manchester and East Lancashire employment areas (50 jobs +). Training offered ranged from the development of track laying and signal installation skills to coach restoration and general building work. This tradition of community involvement has continued with the current ELR Station staff and other personnel still working closely with the Probation Services identifying jobs that provide community benefits and meet the requirements of the Probation Services.

Throughout the 1980's/1990's, through the wider Mersey Basin Campaign to clean up the North West's rivers and corridors, the ELR and its wider Valley Regeneration Strategy was used as a very effective tool in changing people's perceptions of this part of the sub-region as a place to invest, visit, live and play.

Of equal importance, the community benefits delivered by the volunteer programme are significant. Many studies have been undertaken which have assessed the myriad of positive impacts which come from volunteering, including developing the skills and confidence of individuals, bringing people together socially and providing enjoyment and well-being to the participating communities. All of these benefits should be recognised and attributed to the Railway.

5.3 Heritage

The ELLR Company's primary objectives include the education of the public by securing the preservation, restoration, enhancement and maintenance of features and objectives of industrial, scientific and historical interest.

Over the past 20 years the Trust has opened 13 miles of heritage rail track and provided the resources and co-ordination to restore and maintain historic rolling stock.

In working closely with its local authority Trust partners the ELR has been instrumental in acquiring and listing the historic 1848 Castlecroft Goods shed and the c1870's Buckley Wells Locomotive Works. In addition the period Bolton Street Station with its many internal original features has been fully restored from its previous derelict state prior to its acquisition.

At Bury, Heywood, Ramsbottom, Rawtenstall and Summerseat the ELR forms an important part of the Conservation Areas which are progressively being enhanced as part of wider local authority agenda in these areas.

Both the listed Castlecroft Goods Shed and the listed Buckley Wells Locomotive Works have important roles in the housing and restoration of heritage rolling stock and museum exhibits. The Buckley Wells Works in particular has been important for many years in the



stabling and restoration of many engines including many from the National Railway Collection or which are being restored through the Heritage Lottery Fund.

To help with the maintenance upkeep of the Buckley Wells Works a partnership arrangement has been developed with Ian Riley Engineering, one of the leading railway engineers. His Bury Works has a national reputation in the railway heritage restoration field and maintains a full order book for the many aspects of heavy railway engineering he carries out. Since his relocation to Bury, Ian Riley Engineering has developed from a one man concern to a 20+ staff business. In addition to his core skilled staff as part of his staffing structure he employs a number of apprentices.

The value of heritage attractions is assessed by organisations in different ways. The National Trust has recently employed a model¹⁴ which collates information about its heritage attractions under three broad headings, *Optimising the user experience*, *Optimising the impact on the local community* and *Optimising the benefits to the wider population*. Changes to the scores awarded to attractions under these headings are monitored year on year to track whether the public value is improving and if so, in which areas. This report provides the basis for ELR to monitor changes to the Railway in a similar way.

5.4 Environmental and recreational impacts

The River Irwell is the largest of the Greater Manchester tributaries that feed into the River Mersey. The Irwell Valley, together with its branch the Roch Valley, experienced early development as part of the Industrial Revolution but by the early 1970's both Valleys had high levels of dereliction as industry had progressively moved into the surrounding towns. There were no obvious uses for the abandoned and despoiled land, much of it in isolated locations. When British Rail finally closed the railway that served these valleys, the ELR was identified as a lead project in achieving Greater Manchester County Council's Strategic Vision for the valleys by providing a recreational resource on the doorstep of many local communities and in its aspiration to establish a local tourism economy where none existed before.

Over its 20 year period the ELR has acted as a catalyst project that has turned a large scale derelict land problem, straddling three local authority boundaries, into a recreational asset that has reclaimed over 74 hectares of abandoned railway land and acted as lead project for the further development of over 60 hectares of related derelict and despoiled land within its railway corridor.

The establishing of the ELR project as a heritage railway attraction has also protected the overall railway asset and leaves open the longer term possibility of developing the railway in the future for accommodating commuter and freight services.

¹⁴ Demonstrating the Public Value of Heritage, The National Trust and Accenture, 2008



5.5 Catalytic impacts

The objectives of the ELR are firmly rooted in the regeneration of the Irwell Valley. Over the past 20 years the line has expanded its network and in doing so extended its sphere of influence on locations within both the Irwell and Roch Valleys.

To date, the primary locations where a significant catalytic impact can be seen include the Bury station area, Ramsbottom Town Centre and to a lesser extent Rawtenstall. Collectively the ELR has been a flagship project which has signalled a change of image and investment potential for this part of the North Manchester and East Lancashire.

Figure 12 provides a summary of the relationship between the development of the ELR and its impact on the surrounding towns and locations.

Figure 12: Summary of Catalytic Effects of ELR

<i>Location</i>	<i>Description of catalytic effects</i>	<i>Key outputs and outcomes</i>
Ramsbottom	The first wave of impacts from investment in the ELR arose from the development of the station at Ramsbottom. This investment helped reduce the blight effect of a poor environment on the town centre leading to associated public investment in shop frontages and public space. It also provided the opportunity to resolve access issues for the Trinity Paper mills, helping to secure employment at the site.	<ul style="list-style-type: none"> • Improvement in environment adjacent to station • New investment in shop frontages & public space leveraging public funding (LA & EH) • Take-up of apartments above previously redundant shops • Opening up of the river (picnic area) • Improved footfall for businesses • Improved access for Trinity Mills & security of employment
Burrs	The Burrs Country Park has developed alongside the establishment of the ELR and the longstanding potential for a Halt stop at the site. The development of the 40ha site has seen the establishment of an activity centre, caravan park, pubs, and sculpture trail as part of the overall park development.	<ul style="list-style-type: none"> • 40 ha of land redeveloped of which 15 ha was brownfield land • Public investment of £3.9m & private investment of £1.5m (Caravan Club) • Associated business investment & employment • Local and sub regional leisure resource
Summerseat	The provision of a countryside halt stop on the ELR has had a general positive influence on Summerseat location. This has arisen through the general improvement in the environment and the use of the adjacent footpaths.	<ul style="list-style-type: none"> • Improvement in environment • Increased footfall • Establishing Summerseat Nature Area (in partnership with United Utilities and Lancashire Wildlife Trust).
Rawtenstall	The extension of the ELR to Rawtenstall not only extended the railway network but brought economic benefit to the town centre. The ELR	<ul style="list-style-type: none"> • Improvement in adjacent station environment • Raised profile of town through



	<p>station stops short of Rawtenstall town centre which has limited the extent of the positive impact. However, there has been a general improvement in the immediate environment of the station and adjacent location. The closure of the Groundwork centre has had a negative impact on the destination, but there are opportunities to be built on in the future - in particular the corridor from the station into the town centre.</p>	<p>establishment of a terminus</p>
<p>Bury Town centre</p>	<p>The re-opening of the line from Bury to Ramsbottom has over the past 20 years had direct positive impacts on Bury town centre, as well as providing a more general positive image for the town centre. The opening of Bury ELR station provided a distinctive cultural asset for the town which helped kick start the town centre strategy. This was most evident on the streets adjacent to the station with a positive impact on refurbishment and take up of floor space at Bolton Street. Bolton Street was reconnected to the town centre as a result of the investment. This benefited many of the traders and the Bolton Street Business Club members.</p> <p>This positive influence continues today with the ELR providing a positive signal to investors. The new investment in the Transport Museum and associated investment in other cultural assets (e.g. Fusilier Museum) points to increased footfall for the town centre which in turn helps underpin private investment in the town centre.</p>	<ul style="list-style-type: none"> • 41ha of corridor development • Kick start of Bury town centre strategy • New investment in shop frontages on Bolton Street (ERDF/EH/LA & private funding of c£5m) • Reduction in shop voids • Positive influence on long term town centre development through positive image generated by the ELR • Improvement and protection of the conservation area
<p>Heywood</p>	<p>The ELR line at Heywood is some distance from the town centre and this has limited its catalytic effects in terms of the town centre. However, future opportunities exist in the immediate station area to maximise the benefits of the ELR to the town and to Rochdale's economy. The area has recently been declared a conservation area and has historic value in the 1840's Sefton Street Goods Shed, the Phoenix Brewery site and the Navigation Inn denoting its significance as the terminus of the Rochdale Branch Canal. Heywood Station is 1 mile from the M62 Corridor and well placed as a primary arrival point for visitors by road.</p> <p>Plans are also being considered to extend the railway a further 1mile to Castleton Village</p>	<ul style="list-style-type: none"> • 25ha of brownfield land (10 ha at Castleton)



	Centre where the ELR will meet up both the Rochdale Canal and the Castleton Village Network Rail Station giving the ELR an important public transport interchange facility.	
Buckley Wells	Buckley Wells provides the ELR an opportunity to complete an 8ha brownfield land redevelopment programme, close to the town centre and at the same time provide a focus point for railway heritage and restoration. This will add value to the overall visitor experience of ELR.	<ul style="list-style-type: none"> • 8 ha of brownfield land brought back into use • Conservation of listed buildings • Unique capacity in railway restoration & underpinning local engineering industry (supporting 15 to 20 jobs at I. Riley Engineering)

Source: ELR interviews.

The table highlights the significant cumulative catalytic impacts over 20 years. This includes in particular:

- **Reuse of derelict land:** influencing the reuse of over **134 hectares** of land of which some 100 hectares is brownfield land (at Burrs, Buckley Wells & Heywood).
- **Town centre redevelopment:** galvanising partners in developing town centre strategies, in particular at Bury and Ramsbottom, and contributing to the future redevelopment opportunities in Rawtenstall, Heywood and Castleton Village.
- **Funding leverage:** influencing the leverage of over **£10m** public and private sector funding adjacent to Bury Station and at Burrs County Park.
- **Conservation:** influenced the protection of 6 conservation areas at Bury (Bolton Street), Rawtenstall, Ramsbottom, Summerseat, Heywood and Castleton Village, listed 2 historic railway buildings at Castlecroft and Buckley Wells, protected and enhanced Bolton Street Station and various signal boxes, built new station buildings at Ramsbottom, Bury and Rawtenstall to fit in with their Conservation Area settings.
- **Riley Engineering:** providing a base for this specialist conservation railway engineering company employing between 15 and 20 people.

The ELR has played an important part in influencing development along the Irwell corridor varying from a direct impact on the development of certain locations to providing a more uplifting image impact. With the opening to Heywood and potentially to Castleton this role could also be extended within the Roch Valley.

The original concept of developing the ELR within the Irwell Valley Regeneration Strategy has been updated by the ELR Trust partners with a vision for developing the ELR through the establishing of a Regional Park for this part of North Manchester/ East Lancashire.

The ELR has demonstrated in the past that it is capable of kick-starting the rejuvenation of unattractive areas. For example Ramsbottom in the 1980s was considered to be a fairly undesirable place.¹⁵ It is believed by many stakeholders that the area around the station

¹⁵ This opinion was expressed by stakeholders at consultation meetings in Bury and Rochdale as part of this study.



has transformed itself as a result of the railway, with new businesses, shops and cafés opening up.

This catalytic role continues to exert a positive impact on, for example, the development of Bury town centre and the way that the town is perceived by private sector investors.

Figure 13: Regenerative Impact of ELR



Irwell Vale Halt before and after development



Ramsbottom Station before and after development





Rawtenstall Station before and after development



6. Summary of Socio-Economic Impacts

6.1 Baseline impacts

Figure 14: Summary of Key Baseline Indicators

ELR: Key indicators of economic value of ELR	
Visits to the East Lancashire Railway	107,950
Visits made by visitors from outside North West region	16,277 or 15% of total visitors
Total gross expenditure generated for the regional economy (direct, indirect & induced)	£3.85m
ELR indirect expenditure with local companies	£320,000
ELR indirect expenditure with companies within the region	£792,000
Employment supported in regional economy(direct, indirect & induced)	70
Total regional gross value added	£1.6m
Heritage value	13 miles of railway re-instated and assets safeguarded or enhanced.
Number of educational beneficiaries (per annum, 2008)	1,952
Volunteering value c60 FTE posts (approx. value per annum)	£1.561m
Direct environmental benefits (ELR land brought back into use)	74 hectares
Catalytic investment along the ELR corridor (1989-2007)	£10m+



Catalytic land brought back into use along the ELR corridor (1989-2007)	60 hectares+
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6.2 Impact issues & future investment

The assessment in addition to establishing a baseline for the key economic impact indicators reveals a number of issues relevant to setting the future investment options and priorities. In particular:

- **Average expenditure & market segments:** the survey data shows a clear differential in the average expenditure of core visitors and special event visitors. If the objective is to grow the economic impact of the railway, targeting core visitors and visitors from outside the region will be a key. The current baseline estimate of visitors from outside the region is 15%.
- **Local supply chain:** the percentage of purchases made by ELR with firms in the region is high at 60%. The local supply chain is biased towards Bury with some 86% of purchases from the three local authority areas.
- **Distribution of off site expenditure:** the off site expenditure impact will be skewed towards those locations where people start, dwell and stop and thus any desire to increase the distribution of benefits will require both changes to the ELR infrastructure, as well as responses from the public and private sector to seize the opportunity from a growing ELR visitor base.
- **Importance of catalytic impacts:** the ELR has demonstrated in the past that it is capable of kick starting the rejuvenation of unattractive areas and that its catalytic impacts are as important as the direct benefits that arise from a key regional heritage attraction.

