

# Heritage Rail APPG: Briefing on the Value of Heritage Railways

# The Heritage Alliance

26<sup>th</sup> April 2023

[The Heritage Alliance](#) unites nearly 200 independent heritage organisations in England as a powerful, effective, and independent advocate for heritage. As England's biggest coalition of heritage interests, it brings together independent heritage organisations from the National Trust, English Heritage, Canal & River Trust and Historic Houses to more specialist bodies representing visitors, owners, volunteers, professional practitioners, funders and educationalists. Most of England's historic environment is owned, managed, or cared for by Heritage Alliance members.

On 26<sup>th</sup> April 2023, the Heritage Rail All-Party Parliamentary Group (APPG) convened to gather evidence on the value of the Heritage Railway sector, including from our Chief Executive Lizzie Glithero-West. This policy brief was developed to give an overview of heritage railways, their unique contribution to the sector, and the challenges and opportunities they face.

## Sector Overview

1. England's heritage industry directly contributes £13.1bn in gross value added (GVA). Larger than the security industry, defence industry and the aerospace industry.<sup>1</sup>
2. Indirectly, England's heritage industry contributes £36.6bn, equivalent to 2% of national GVA, and the heritage sector provides 564,000 jobs.<sup>2</sup>
3. 99% of people in England live within a mile of a listed place and 80% of people think local heritage makes living in their area better.<sup>3</sup>
4. There are 19 Industrial, Maritime, and Transport THA Members. Rail related members consist of Friends of Stockton & Darlington Railway, Heritage Fuels Alliance, Heritage Railway Association, Association of British Transport & Engineering Museums, and National Transport Trust

## Heritage Rail in Context

5. Heritage Counts data currently does not include Heritage Rail; there's a significant data gap here which means the contributions of heritage rail are underestimated.
6. The UK heritage rail sector encompasses more than 211 operational railways, running trains over nearly 600 miles of track and operating between some 460 stations.<sup>4</sup>

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<sup>1</sup> [THA Manifesto](#), 2019

<sup>2</sup> [Backing the Bedrock](#), 2022

<sup>3</sup> [Heritage and the Economy](#), 2019

<sup>4</sup> Heritage Rail – Economic and Social Value, 2021-2023

7. This sector attracts up to 13 million visitors who take 18.6 million passenger journeys covering 130 million passenger miles.<sup>5</sup>
8. The Heritage Rail sector serves as a vital part of Brand Britain with icons such as the Flying Scotsman, and cultural touchstones from The Railway Children to Harry Potter.<sup>6</sup>
9. Heritage rail creates jobs and greatly supports local and regional supply economies. It employs 4,000 staff, 22,000 volunteers, and provides £600m in economic value.<sup>7</sup>
10. Heritage rail keeps the show on the road by preserving and engaging audiences with 'living' heritage and keeping rolling stock rolling so that it doesn't become a static museum display. This brings many advantages and opportunities for skill and community building, audience engagement and creativity, but it also brings a set of unique challenges.
11. Our Mobile Heritage Advocacy Group brings together those with similar sets of issues and concerns and looks at the policy change and advocacy messages needed to ensure this important part of our heritage keeps rolling in the future.
12. Heritage offers many solutions to other public policy problems and heritage railways are a big part of this picture from international engagement and soft power to offering wellbeing and health benefits through to attracting tourism and regenerating places.
13. The HRA is at the heart of the European Federation of Museum & Tourist Railways (Fedecrail) while individual historic railways create their own links, for example through twinning.<sup>8</sup> Through travel grant schemes they've collaborated internationally with rails across the world such between The Chair of the Friends of the Stockton & Darlington Railway and American institutions and Friends of Sierra Leone Railway Museum with the Ebute-Metta National Railway Museum of Nigeria. We also supported connections between our members and an Oxford University facilitated delegation from Nigerian railway heritage.

## Key Issues

1. Lack of Data: The last APPG report and economic assessment was in 2013. There is a major need for an updated economic impact assessment on this sector.
2. Coal: The Heritage Rail Sector uses a relatively small amount of high-quality bituminous coal, 35,000 tons p/a compared to the 8 million used UK-wide each year, which is essential for the specialist operation of steam engines. By comparison, the Drax power station could consume up to 36,000 tons of coal a day before it was converted to burn biomass fuel.<sup>9</sup> If UK coal is not available, importing coal can result in CO2 emissions from shipping that are 5 times higher.<sup>10</sup> Research into alternative fuels to coal is being undertaken, and trials have been conducted in steam locomotives with three products: Heritage Wildfire, Wildfire and Homefire Ecoal, that all produce reduced CO2 emissions and have less environmental impact.<sup>11</sup> Most heritage-coal

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<sup>5</sup> [HRA](#)

<sup>6</sup> Heritage Rail – Economic and Social Value, 2021-2023

<sup>7</sup> [HRA](#)

<sup>8</sup> [THA International Report](#), 2018

<sup>9</sup> Heritage Fuels Manifesto 2018

<sup>10</sup> [HRA](#)

<sup>11</sup> [CPL Industries](#), 2022

use takes place in the open countryside or on the edges of country towns – outside the application of Clean Air Acts where the impact is minimal and seasonal.

3. Diversity: Cultivating a more open and inclusive space in this sector is a big priority, and the HRA has led the way by forming a Diversity and Inclusion Committee which has produced an EDI toolkit and training for all HRA members.<sup>12</sup>
4. COVID-19 recovery: Visitors are the lifeblood of heritage railways. The pandemic caused significant revenue loss and made planning difficult. Volunteer numbers have declined, especially older volunteers who have had to limit their work due to COVID or who have since chosen to leave the workforce.<sup>13</sup>
5. Cost of Living: Whilst everyone is struggling, heritage railways are facing compounding issues due to heavy reliance on coal, expensive components like steel and timber, volunteering and tourism, all of which is taking a hit due to inflation. Some organisations are also facing an emerging insurance problem, and there are issues with chef and hospitality availability and rising food costs.
6. Skills Gap: Older volunteers with specialized skills in heritage railways are leaving the workforce and there's a risk of these skills being lost.<sup>14</sup> Investment in skills training is also a significant issue, with a trickle of people interested in short courses, but larger organisations are struggling to generate interest leading to a long-term skills crisis.

## Questions

### **1. What proportion of visitors are attracted by heritage rather than other attributes? Is heritage generally a determinant of holiday location, or is it an adjunct to the main purpose of a holiday or short break?**

One Visit Britain report found that in 2019, out of 40.9 million visits, 47% of all visitors came to see famous monuments and buildings.<sup>15</sup> 66% of domestic tourists cited being able to visit a historic building or monument as the 'sole reason' or a 'very important' reason for their trip.<sup>16</sup> 6/10 most popular attractions in 2022 were museums or historic sites.<sup>17</sup>

### **2. Is interest in heritage more significant for domestic visitors or incoming visitors from overseas?**

It is significant for both. In 2019, Heritage Counts found that 85% of visits to historic attractions in England were domestic, but that over half of tourism spend is generated by international visitors. Heritage Counts 2020 found that three quarters of adults in England (40 m people) visited a heritage site at least once in 2019/20.

But heritage is also an integral part of the UK brand internationally, driving millions of international visits each year. Visit Britain's GREAT campaign has identified heritage as one the UK's 12 'USPs' that draws people to the UK – Britain ranks 6<sup>th</sup> internationally for being rich in historic buildings and

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<sup>12</sup> [HRA](#)

<sup>13</sup> [Getting Back on Track](#), Historic England, 2021

<sup>14</sup> [Getting Back on Track](#), Historic England, 2021

<sup>15</sup> [Activities in Britain's nations and regions](#), VB 2019

<sup>16</sup> [ALVA visitor figures](#), 2022

<sup>17</sup> [ALVA visitor figures](#), 2022

monuments<sup>18</sup> and 77% of international tourists cite the opportunity to explore Britain's history in the top three reasons for their trip.<sup>19</sup> In this digital age, UK heritage underpins the success of British film, television and video industries and enhances their export potential – and heritage railways are an important element of this.

### **3. What threats and opportunities do you see for the heritage sector in the UK?**

#### **Opportunities:**

1. Popular support for heritage and Strengthened connections with local communities during and after Covid.
2. Levelling-Up Bill and positive planning reform – including statutory HERs, potential reassessment of demolition, and increased investment in place-based and culture-led regeneration. There is potential for heritage railways here either in one location or in connecting locations and stories.
3. There is a significant potential to drive forward net zero goals through repair and retrofit – if properly supported.
4. Heritage's role in engagement and wellbeing including through digital engagement.
5. Key upcoming anniversaries to draw upon for continues support – e.g. Stockton and Darlington 200<sup>th</sup>

#### **Threats:**

1. Public spending squeeze coupled with Cost-of-living challenges – our data desk has identified impacts across 6 key themes: rising energy prices, staff, consumer confidence, cutting costs, Covid impacts, and sustainable energy
2. Staffing - reliance on volunteers of this part of the sector, and emerging concerns around productivity with an aging workforce and an unstable skills pipeline
3. Unsupportive VAT regime for repair and a misunderstanding of embodied carbon
4. Ongoing impacts of Brexit on workforce and materials
5. Rail specifically falls between various support bodies and departments, sitting across several but belonging to no one area in particular – can cause challenges with funding and engagement – there is no 'list' for rolling stock like there is for buildings.
6. Challenges in terms of the built environment around heritage railways. The Victorian Society believes that if unprecedented plans to construct a tower above Liverpool Street Station are approved it would set a terrible precedent which would threaten the future of all London stations.<sup>20</sup>

### **4. Within the heritage sector, how significant is heritage rail? How does it compare with other heritage attractions such as castles, stately homes, or other mobile heritage?**

Mobile and industrial heritage is the third largest part of our membership. It is somewhat smaller economically than other sector areas but still vitally important – and we note that there is a data gap here which means the full contribution of this sub sector has not been recognised. Heritage Rails welcome up to 13 million annual visitors, 4,000 employees, 22,000 volunteers, and provide £600m in

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<sup>18</sup> [ALVA visitor figures, 2022](#)

<sup>19</sup> [MIDAS 2022](#)

<sup>20</sup> [Victorian Society, 2023](#)

economic value (HRA). Comparatively, England's heritage industry contributes £36.6bn, equivalent to 2% of national GVA, and the heritage sector provides 564,000 jobs.<sup>21</sup>

## **5. What guidance could you give to members in relation to making the most of their value to local communities and in national terms?**

COVID-19 raised the profile of outdoor opportunities and boosted awareness of local attractions – heritage rails should continue to proactively engage with local communities which can provide a new base of support.<sup>22</sup> Consider whether your organisation can support an internship, apprenticeship or traineeship to engage younger people as well as older volunteers, and whether you can be creative and flexible with volunteering opportunities to attract a wider range of people. Proactive approaches to online fundraising been highly successful for some heritage railways – for example, North Yorkshire Moors Railways who raised over £400k through a crisis appeal on social media.

All heritage sites should make the effort to pursue levelling-up funding and culture-led regeneration bids – there will be quite a bit of capital available if you can make the case to be part of these. Canal and River Trust, for instance, have been working with partners on levelling up projects along the Leeds-Liverpool Canal. Similarly, railways often run through ex-industrial areas that need regeneration - railways can offer to be part of the solution. There may also be wellbeing opportunities or creative partnerships you can forge with others working locally.

There are some great examples in the recent HRA awards of where railways are engaged in positive climate and environmental projects. For example, the North Yorkshire Moors Railway won the HRA Award for Environmental Innovation for their Primrose Path project. The initiative has focused on the restoration, conservation, and connection of two miles of lineside. It has restored lost habitats and worked to protect species like the Duke of Burgundy butterfly and declining adder populations.

## **6. Do younger people have an interest in heritage and how would you see the heritage offer developing to continue to engage with them?**

Yes, but much more can be done to engage young people in heritage. 22% of visitors to heritage attractions are under 25<sup>23</sup> but at our 2020 Heritage Debate we learned that some young people perceive heritage as being boring, with travel distances and the cost of visiting serving as key deterrents. This trend is especially pronounced among young men.<sup>24</sup>

Reduced prices, interactive events, and digital experiences (52% said a digital event made them want to see it in-person) are all potential solutions.<sup>25</sup> Early years engagement is also vital – those who didn't visit heritage sites as a child were much less likely to visit as adults, while those who did were much more likely.<sup>26</sup>

## **7. Have you been able to measure the educational and skills training benefits associated with heritage in general and industrial heritage in particular?**

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<sup>21</sup> [Backing the Bedrock](#), 2022

<sup>22</sup> [Getting Back on Track](#), Historic England, 2019

<sup>23</sup> [2019, Heritage Counts](#)

<sup>24</sup> [Youth and Heritage Study](#), Ecclesiastical, 2023

<sup>25</sup> [Youth and Heritage Study](#), Ecclesiastical, 2023

<sup>26</sup> [Youth and Heritage Study](#), Ecclesiastical, 2023

We are aware that a sector-wide skills audit is overdue and would be timely. We do know that heritage railways provide employment and for around 4,000 people (FTE), as well as skills training and apprenticeships.<sup>27</sup> Importantly, these jobs are frequently located in areas of the country where employment opportunities, particularly for skilled workers, are low. There are also 18,500 volunteer supporters, and for some younger staff, they provide valuable training for future careers, whether within the wider railway network or beyond it. In the case of older volunteers, volunteering with railways can offer a sense of achievement, outdoor exercise, and social interaction.<sup>28</sup>

An inspiring example of skills being kept alive can be seen at the Bluebell Railway, who have engaged two remaining 'trimming' experts in passing on their skills to a wider group. They now have a new conservation lab on site and a voluntary trimming force doing work for other sites too. Work is also underway to respond to the Migration Advisory Committee's evidence gathering on shortage occupation – we are still seeing impacts post-Brexit on a number of areas as well as in areas such as hospitality and catering.

**8. Have you been able to articulate the well-being benefits of heritage (for both visitors and staff/volunteers who are engaged in providing the experience.) Any thoughts on this would be welcome.**

Yes, our report *Heritage, Health and Wellbeing* details this further. The demonstrates that heritage offers a sense of place, identity, and shared understanding. It also provides tangible benefits, such as boosting volunteers' confidence and social skills. The report highlights some of the best practices and innovation by Alliance members such as club nights (Alexandra Palace) and yoga classes (Powderham Castle) and sensory workshops for people with dementia (Historic Royal Palaces).<sup>29</sup>

Heritage organisations need to continue considering well-being as fundamental in their future organisational strategies, and the health and care sector should recognize the benefits of heritage including through social prescribing.<sup>30</sup> The 2020 Places of Joy Project led by the University of Southampton with Cambridge and Surrey found that visits to heritage sites have clear subjective wellbeing effects in increasing happiness and reducing anxiety. During the pandemic, heritage sites took on an important role as safe social spaces. Before lockdown, 42.4 % of visitors said that they visited heritage sites to spend time with friends and family<sup>31</sup>, whilst in the post-lockdown sample the proportion of visitors who chose that reason was 83.5%. Importantly there appears to be no difference in the subjective wellbeing benefits experienced by visitors who explicitly value the historic environment and those who do not - offering heritage providers opportunities to reach new audiences who might otherwise assume that visits to sites are not for them.

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<sup>27</sup> [Getting Back on Track](#), HE, 2021

<sup>28</sup> [Getting Back on Track](#), HE, 2021

<sup>29</sup> *Heritage and Wellbeing*, [2020](#)

<sup>30</sup> *Heritage, Health and Wellbeing*, THA [2020](#)

<sup>31</sup> DCMS Taking Part Survey 2019

## **Sources:**

1. [THA Manifesto](#), 2019
2. Backing the Bedrock, 2022 (Yet to be released, contact Max Clark [comms@theheritagealliance.org.uk](mailto:comms@theheritagealliance.org.uk) for further details)
3. [Heritage and the Economy](#), 2019
4. [HRA Website](#), Date Unclear, Possibly 2013
5. Heritage Rail – Economic and Social Value, 2021-2023 (Contact Steve Oates [steve.oates@hra.uk.com](mailto:steve.oates@hra.uk.com) for access)
6. [THA International Report](#), 2018
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13. [MIDAS](#), 2022
14. [Victorian Society](#), 2023
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16. Youth and Heritage Study, Ecclesiastical, 2023 (Not released publicly, contact Max Clark [comms@theheritagealliance.org.uk](mailto:comms@theheritagealliance.org.uk) for further details)
17. Heritage, Health and Wellbeing, THA [2020](#)

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