

All Party Parliamentary Group on Heritage Rail

Report on the Value of Heritage Railways

July 2013

The Social and Economic Value of Heritage Railways



Main line connection: A charter train from London crosses the new link from Network Rail to the North Norfolk Railway and brings out the crowds in 2010 (Photo Richard Dixon)

All Party Parliamentary Group on Heritage Railways

Members conducting the oral evidence sessions

House of Commons:

Mark Garnier MP (Con)	- Chair
Susan Elan Jones MP (Lab)	-Vice-Chair
Martin Vickers MP (Con)	- Vice-Chair
Nigel Mills MP (Con)	
Nicky Morgan MP (Con)	
Helen Goodman MP (Lab)	
Robert Goodwill MP (Con)	
Andrew Selous (Con)	
Richard Bacon (Con)	

(Research Assistants to Rt Hon Patrick McLoughlin MP and Norman Lamb MP also attended a session.)

House of Lords:

Lord Grocott (Lab)	- Vice-Chair
Lord Faulkner of Worcester (Lab)	- Vice-Chair
Lord Snape (Lab)	
Lord Wigley (Plaid Cymru)	

Secretariat:

Chris Austin, OBE	- Secretary
-------------------	-------------

PART ONE – KEY RECOMMENDATIONS AND EXECUTIVE SUMMARY

Key recommendations.

The Group has made six key recommendations as a result of this inquiry:

FOR GOVERNMENT

1. **Planning Law.** Heritage railways should be able to benefit from the same permitted development rights as Network Rail does on the national network. We believe guidance is needed to prevent over-zealous interpretation of planning legislation and regulation stifling development of heritage railways.
2. **Railway extensions.** The requirements for a Transport & Works Act Order for modest extensions to heritage lines should be simplified, possibly using an on-line proforma application process.
3. **Sponsorship.** The Department for Transport should take the lead sponsorship role on policies affecting heritage railways. The Department for Culture, Media and Sport should remain responsible for policy on tourism issues and the Department for Business, Innovation and Skills for apprenticeships, training and development.

FOR LOCAL AUTHORITIES

4. **Public Transport.** There is scope to provide a public transport service on some heritage railways and a 'public tourist service' on some others which should

be further developed and encouraged. Local authorities and the railways themselves should work together to consider the opportunities in their areas.

FOR THE RAILWAYS THEMSELVES

5. **Marketing.** Many heritage railways have a very attractive offer, but few are effective in marketing it, particularly through websites and through social media. At the least, it should be possible to book tickets or join the supporters' association on-line and more use should be made of the opportunities of Facebook and Twitter.
6. **Qualifications.** HRA should work with member railways to establish National Vocational Qualifications in railway heritage engineering and operational skills.



Appeal to all ages. The next generation is engaged through events like Days out with Thomas. (Photo: Jennie Dunse)

Executive Summary

1. ***Economic Benefits.*** Heritage railways make a major contribution to the economies of the areas they serve both in terms of attracting tourism and of substantial spending on local services. Research undertaken for a number of railways suggests a mean benefit to the local economy of around 2.7 times the railway's turnover. In aggregate, this would suggest that the economic benefit nationally is just under £250m. The research in this area is limited and we recommend further research to develop a more robust figure.
2. ***Skills Training.*** Heritage railways also provide employment and valuable skills training including apprenticeships. Frequently this is in areas of the country where employment opportunities, particularly for skilled workers, are low. In particular, they provide entry level jobs for a wide range of skills and disciplines. They also offer a productive use of the time of 18,500 volunteer supporters who devote their own time and money to running, maintaining or developing their railway. For some younger staff, they provide a valuable training ground for subsequent jobs on the main line network or elsewhere. For older volunteers, they offer a sense of achievement and the health benefits of steady exercise and social interaction.
3. ***Subsidy free.*** Railway preservation started spontaneously in the 1950s and for 40 years was self sustaining. From the Transport & Works Act 1992 and particularly the Railways Act 1993 onwards, regulation of their activities has increased

significantly. Nevertheless, over 100 railways operate throughout the United Kingdom today with no financial support from central or local government.

4. ***Bureaucracy.*** In common with other small businesses, many witnesses were concerned at the growing requirement for onerous processes required to comply with legislation and regulation. Compliance with safety legislation and processes is not in question and is endorsed by the Group. Examples given suggest that the unnecessary or unreasonable application of other regulations is as much to do with local interpretation as with the regulations themselves.
5. ***Public Transport.*** We consider that more should be done to develop the potential of heritage railways to offer public transport on their lines as well as the experience of a steam train ride. This should be supported by local authority grant or franchise payment where justified, in the same way as applies to National Rail operators.
6. ***Sponsorship.*** The Group was surprised to find no focus in Government to which the sector could relate. We believe that a single department should be the lead contact for heritage railways, recognising that they interact currently with three (DfT, DCMS and BIS), and with the independent regulator ORR. We believe that a minister within the DfT is best placed to take the lead responsibility on policy issues, but that ORR should continue to be responsible for safety regulation, DCMS for policy on tourism and BIS for training and apprenticeships.

7. ***Marketing and Promotion.*** In general, the Group considers that heritage railways could do more to promote their services through their websites and through social media. HRA should continue to encourage dissemination of best practice amongst its members, and promote the techniques used by other visitor attractions and transport operators. In particular, we believe more use could be made of Twitter and Facebook.
8. ***Compensation for delays.*** The future of charter train operations was threatened by a proposal to remove the cap on liability for delays and reflects the law of unintended consequences. It underlines the need for rail industry bodies to consider the implications for heritage railways before promoting legislative or regulatory change. We are pleased to learn that a cap will remain and await consultation by ORR on the proposed capacity charge.



Living history. The Severn Valley Railway created Kidderminster Town station using restored GWR buildings from many locations. (Photo: SVR)

PART TWO – REPORT

Introduction

The All Party Parliamentary Group on Heritage Rail was formed in 2011 and includes members who have a heritage line in their constituency or who have an interest in the many aspects of their development and operation. The group is supported by the Heritage Railway Association (HRA), which provides the secretariat. The HRA represents heritage railways in the United Kingdom and Ireland and has 108 member railways and around 60 steam museums as well as individual members. Member railways depend heavily on volunteers and the HRA itself is run entirely on a voluntary basis, and this includes the Group's secretariat which is provided by the HRA at no charge.

Having heard from a number of experts during their first year, and visited a cross section of lines, the Group agreed in 2012 to undertake a study into their value to the communities they serve and to the United Kingdom generally, with the following remit:

“To establish the current and future value of heritage railways to the local and national economy; to identify the contributions they make to their local community including education and training, employment, sustainable tourism and health and wellbeing as well as the Big Society; to establish best practice amongst heritage railways; and to identify and advise on current and future Government policy affecting the heritage railway industry.”

Acknowledgements

The Group acknowledges with thanks the cooperation of the HRA in the preparation of this report and to member railways which participated in the questionnaire from which some of the evidence is drawn. Particular thanks are due to those who appeared as witnesses, allowing debate in depth on a number of key aspects. Thanks are also due to the security firm Smartwater whose generous contribution paid for the printing of this report and to Agnieszka Kandouci who contributed to the report and provided the financial analysis.

Sources of Information

Evidence was gathered in three ways:

1. Oral evidence from witnesses in four sessions in the House of Commons. The list of witnesses and the dates of their evidence are set out in Appendix One.
2. A survey questionnaire of members of the Heritage Railway Association carried out between January and March 2013. Forty six railways, tramways and museums took part in this. The questionnaire and the organisations that responded are shown in Appendix Three.
3. A group discussion session facilitated by the Heritage Railway Association at one of their regular meetings was led by the Group's secretary on 20 March 2013.

Other source material used has been the annual statistics collected by HRA for their report to the Railway Inspectorate, and data supplied by individual railways.

Background

The railway heritage movement started in 1951 with the establishment of the Talyllyn Railway Preservation Society, formed to take over and run this narrow gauge railway in mid Wales, following the death of its owner, Sir Haydn Jones. His and another North Wales narrow gauge railway, the Ffestiniog, had not been incorporated into British Railways under the Transport Act, 1947, but had remained small independent companies. In 1960 the first standard gauge preserved railway, formerly operated by BR, started running as a private company called the Bluebell Railway. Many more lines were taken over by preservation societies, particularly in the 1970s and have subsequently consolidated and expanded. Today there are a total of 108 heritage railways running in the United Kingdom and Ireland with 400 stations and a total of 510 route miles. This is a greater number of stations than run by London Underground and an aggregate route mileage equivalent to that between London Kings Cross and Aviemore station in the Highlands.



In the beginning. The pioneering Talyllyn Railway in 1953.
(Photo Ian Allan Publishing).

Most heritage railways started as a way of preserving a length of railway on which to operate a public service. Many started operating after the end of steam on British Rail in 1968. Consequently, most would have had to make use of second hand diesel locomotives, had it not been for the remarkable survival of such a large number of steam locomotives in a scrap yard in Barry, South Wales. The owner, Dai Woodham, was happy to sell these not for scrap, but to preservation societies or small groups of enthusiasts who gradually and painstakingly restored them to running condition, usually over a ten or twenty year period.



Steam continues to drive the development of tourism on most heritage lines (Photo WSR)

By the late 1980s, most railways had not been able to sustain a conventional public transport service but, with restored steam engines, had created a major new market for travel on heritage railways. Over time, many lines have become major tourist attractions in their own right and some have grown to

be substantial businesses in the (often rural and coastal) areas in which they operate.

Characteristics of Heritage Railways

It seems to the Group that heritage railways on the scale on which they operate today, offer significant benefits to Britain. These are summarised below:

1. They are major tourist attractions in their own right and attract many day trip and long stay visitors. This generates economic activity in the area by accommodation and catering providers as well as through supporting local retailers.
2. Paid staff live in the area and spend their income locally.
3. Volunteers on the railway bring business to local enterprises in the same way that visitors do.
4. The railway itself spends significant sums locally on the provision of goods and services, including local rates.
5. The railway provides employment, skills training and a productive outlet for volunteers, both those who have retired from full time employment and those of school or college age.
6. In many cases the railway does provide a public transport service or a “tourist transport” service, in some cases providing car free access to sensitive rural areas or small towns.
7. This can form the basis of walks or exploration involving an active lifestyle with its concomitant health benefits. With their traditional rolling stock, often carefully adapted, they can accommodate cyclists

and provide an accessible service much enjoyed by many with limited mobility.

The sector is much larger than generally understood as shown by the statistics in the box below.

UK Heritage Railways statistics 2011	
Number of railways	108
Number of visitors	10.3 million
Number of passengers	7.1 million
Earnings	£92 million
Paid staff (full time equivalent)	3,713
Volunteers	18,529
Route miles	536
Number of stations	411 (270 on LUL)
Number of steam locomotives	763, (diesel, 992)
Coaches	2,014
DMU vehicles	253
<i>(Source: HRA)</i>	

Structure, Organisation and Business Model

The organisation of individual heritage railways takes a number of different forms, but common to most is a structure based on an operating company (most often a plc) which runs the network and the trains, and holds the safety case. There is usually a supporters' association, in many cases a charity, which may attract or recruit volunteers and raise funds particularly for special projects. Very few railways earn a conventional rate of return and are able to remunerate shareholders. Most reinvest any profit in their railway, and

some have amended their memorandum and articles of association to become 'not for dividend' companies – an interesting parallel with Network Rail.

"HRA advice was that the trading arm of a railway should be a plc, but that there were advantages if the assets were owned by a charitable body, particularly to protect the assets such as historic locomotives, in the event of a company being wound up"

Philip Benham (General Manager, NYMR)

Whilst this could be applied to new companies, Philip Benham (NYMR) confirmed that there was a reluctance to change longstanding organisational structures even though Nick Ralls (SVR) told us that there was a proliferation of bodies on some railways.

"As a lawyer, I have had to draft a lot of these constitutions and my main aim was that the trading arm should be a plc or share holding company, and the charitable body should own most of the assets. For two reasons- the first of all for charitable relief and rating purposes and secondly to protect historical items from the creditors because the trading arm can suffer. We (...) were able to protect quite a lot of the assets because I insisted that they were placed on loan from the trust to that organisation."

David Morgan (HRA Chairman)

The Heritage Railway Association is the trade association for heritage railways and appears from our witnesses to play a vital role in sharing best practice and providing technical and business advice as well as acting as a conduit for dialogue between the heritage railway movement and Government, particularly ORR and HMRI. It appears to be a body trusted by its members and Government, and, remarkably, is itself run by volunteers.

Economic Impact

A number of studies have now been undertaken to establish the value of heritage railways to the communities they serve. In particular, studies of the West Somerset Railway by Professor Les Lumsdon of the Manchester Metropolitan University (who is now at the University of Central Lancashire), and of the Ffestiniog Railway by Bangor University have shown that they can provide a powerful stimulus to the local economy, both through visitor spend, and also through the purchase of goods and services by the railway itself and of course by the staff they employ. Volunteers also spend money on meals, accommodation and fuel during their turns of duty.

The Severn Valley Railway was closed for much of the 2007 season as a result of severe damage to the infrastructure caused by flooding. This not only had a devastating effect on the railway, but also severely affected many other catering and retail establishments in the valley where it is the principal tourist attraction, particularly in the town of Bridgnorth.

"Several years ago the Severn Valley Railway was closed for a period of 8 months as a result of flooding, and I'm reliably told that during that time 12 local businesses closed and W H Smith, who used to be open 7 days a week, closed their shop on the Sundays. And I went to the European Commission and they said, "You don't have to say anything, we have already agreed €750,000 for you". Therefore it is not just theories and academic studies, we have seen for real what happens when the local rail track dies, and it impressed the people in Brussels enough to realise quite a significant amount of money without having to go through all the normal procedures."

David Morgan (HRA Chairman)

In order to assess the local economic impact of heritage railways more specifically, the ratio of the estimated economic value to the organisation's turnover was calculated and shown in the table below. These indicate that for every £1 that is spent on the railway, a mean average figure of £2.71 is added to the local economy.

Heritage Railway	Annual turnover	Economic value	Economic value to turnover ratio
Ffestiniog and Welsh Highland Railways	£4,994,000	£4,200,000	0.84
West Somerset Railway	£2,670,000	£5,000,000	1.9
Severn Valley Railway	£5,371,952	£10,350,000	2.11
North York Moors Railway	£5,000,000	£30,000,000	6
Average			2.71
Standard deviation			1.96

The standard deviation for the calculation above equalled 1.96, which stems from the wide range of results from individual railways. This is due to the lack of a standardised method of measuring the impact, which would produce more credible and comparable results. Currently heritage railways in Britain rely on a wide range of ways of measuring this impact, ranging from studies conducted by local universities,

to studies by local authorities, and those by private research providers.

This is clearly an area for further research to establish a method that could be applied to all railways. In the meantime, however, the work done would suggest a value to Britain of £248m plus the value of the income tax and other payments by the 3700 paid staff.

“In our particular case, according to the Yorkshire tourism board, it is around 4 to 6 times the value of our turnover to the local economy, which is around £30 million, that’s an important statistic when looking for support, particularly direct financial support. It isn’t something that is terribly easy for us to do on a regular basis because in order to get valid results it has to be done very carefully and it has to be done with professional organising and support. (...) I think the overall value of heritage rail is not perhaps as well understood as it perhaps should be.”

Philip Benham (General Manager, NYMR)

A tangible example of direct support for the local economy is that of the 46 railways questioned, 84% operated a ‘buy local’ policy, 62% planned line extensions or more stations and half planned to take on more paid staff over the next five years. Two thirds contributed to charities.

Bill Ford of GCR made the point that heritage railways are static and cannot relocate to an out of town location or somewhere more convenient. With this in mind, local authorities should recognise their role as an anchor in the local economy and encourage the development of a ‘heritage quarter’ around their stations.

Government and Agency Roles

The support given by local authorities and tourist boards presents a mixed picture. In some cases, the local authority recognises the value of the attraction and promotes it actively and encourages related development. Bill Ford confirmed that Leicester City Council and the city's elected mayor were more aware of the impact of the Great Central Railway than were the smaller local authorities, which had been slow to realise its regeneration potential. Similarly, the destination management agency, Leicestershire Promotions had been slow to follow up opportunities, in his view, and their report on the economic impact of the railway had proved to be an inadequate tool for measurement.

Mark Smith (HRA) endorsed the work of Visit England and its partner organisations in Scotland and Wales. He highlighted the value of their marketing campaigns and the statistical analysis they produced. He advocated strengthening their quality assurance scheme as a way of driving up quality. He also regretted that budget cuts over time had limited their effectiveness.

An example of good practice took place during the Olympics torch relay which was carried on 14 heritage railways, tramways and cliff lifts. Each heritage railway has only limited marketing resources, but this coordinated national approach spread the word on Britain's rich industrial heritage and the attractions of places outside London.

In general, heritage railways have raised their own capital and made use of support in kind to achieve their aims. Some have benefitted from grants towards the completion of capital projects where tangible societal benefits have been produced.

Evidence from Gordon Rushton on the Welsh Highland Railway indicated that the principal source of funding for the £28m project was private donations of £10m, but that grants from the Millennium Commission (£5.5m) and Welsh Government (£6.3m) were also significant. Heritage railways do not, however, receive revenue support or any other form of public funding similar to the franchise payments made on the national rail network.

There was some criticism of the level of regulation and its effect on smaller, local initiatives. A number of railways gave examples of regulation designed for other purposes resulting in bureaucratic and unnecessary procedures on heritage lines. Examples quoted include:

1. Requirement for an environmental impact assessment for digging a small ditch.
2. £200,000 cost of preparing the documentation and securing the approvals required for a two mile railway extension, before any work on the ground could commence.
3. Refusal of consent to widen an access gateway by removing three metres of brambles described as an 'ancient hedge' (Isle of Wight Steam Railway)
4. Limited hours of operation under the terms of the Transport and Works Act order, limiting evening and night time running. (Great Central Railway (Nottingham) Ltd and Lynton & Barnstaple Railway)
5. Lower age limits for train crew on a 2' gauge railway compared with one with a gauge six inches wider, limiting the ability to recruit enthusiastic younger volunteers (Sittingbourne & Kemsley Light Railway)

"We're in the situation where, if I want to build the high speed line from London to Kent to the Channel Tunnel, I have to fulfil a certain regulatory standard. If I want to extend the Llangollen line to Corwen, I still have to follow the same regulations (...) It's like all these things we hear a lot, about trying to remove red tape and making it easier for business... I think actually helping the Heritage Railway movement expand would be of wider benefit for the wider economy as well."

Tim King (Shropshire's Tourism Development Officer)

There was also general criticism of the level of administrative input required and the growing problem of the burden of evidential requirements for volunteer competency and compliance issues with data protection, child protection, equality and diversity record keeping. Time, effort and cost associated with ensuring compliance with legislation affected the whole organisation. (East Anglia Railway Museum)

There is a tendency by the Government and public funding agencies to place the emphasis on new initiatives and short term projects, whereas a better result might be achieved by looking at what works and focussing on that. (South Tynedale Railway)

Most railways, however, accepted that whilst it may be more onerous than in the past, safety related regulation is there for a purpose and requires proper compliance. This position was strongly endorsed by the HRA.

Public Transport

In general, heritage railways provide a tourist ride rather than a public transport service. People come to enjoy the experience of travelling on a steam train, rather than to get from A to B. Numbers of lines linked with the national network are shown in Appendix Four, together with those with plans to link up over the next five years.

There are three factors to be borne in mind when considering the provision of a transport service on a heritage railway:

1. Speeds on heritage railways are generally limited to 25 mph by their Light Railway or Transport & Works Act order. Scope exists to increase this to a higher speed, but whilst the physical alterations required may be relatively modest on lines that were built for higher speeds, it would also take the line out of the established definition of a heritage railway. This in turn would move it into a different category in terms of requiring a more onerous safety certification regime, as well as amendment of the original Light Railway Order.
2. Fares per mile are considerably higher than the normal bus or national rail fares, reflecting the higher cost of operating steam locomotives and heritage equipment.
3. Heritage railways depend on volunteers who are happy to work conventional day shifts for part of the year, but may not want to work all year round on shifts covering the times required by public transport customers, say between 0600 and 23.00. This would mean using supplementary paid staff to fulfil such a commitment.

The use of paid staff would alter the economics of the lines, which would no longer be self supporting. However, support payments by local authorities or through the franchise agreement of main line train operating companies could be justified by the social and economic benefits that a rail service would bring, where it helped to solve a transport problem in the area. This would be no different from the support payments required by all local National Rail services and indeed, the costs of a service provided by a heritage railway may well be lower. Such payments could contribute to the cost of using more paid staff and to reducing fare levels through, for example, a local residents' railcard.

In some cases, the section of railway preserved is only part of a longer route, and has no real worthwhile public transport function to perform. While some lines go 'from nowhere to nowhere', others do run in a corridor where a conventional public transport service could be offered, subject to the issues referred to above. In other cases, the railway could have a valuable 'public tourist transport' role to offer, even if a conventional commuter service would be unlikely to be worthwhile.

This phrase was used by Paul Lewin (Ffestiniog Railway) in his evidence. The new Welsh Highland Railway performs this function well in providing car-free access to the Snowdonia National Park. The North York Moors Railways does the same for Whitby where summer parking is constrained and the roads approaching the town are badly congested. The Swanage Railway operates a park and ride service allowing drivers to avoid the congested A351 which severs the picturesque village of Corfe Castle.



“Public tourist transport”; car free access to Whitby.
(Photo: NYMR)

Heritage Railways in business before the Railways Act, 1993 are not regulated in the same way as the national network and independent operators have no rights to use their infrastructure. In general, the use of a heritage railway for public transport purposes is at the discretion of the operator. David Morgan (HRA) gave the example of the Keighley & Worth Valley Railway where volunteers had previously not supported proposals to run modern diesel units on their line. On the other hand, many of the preservation societies had started off with the objective of restoring a regular public service, so views were divided. Philip Benham (NYMR) had received praise from Whitby for extending the steam trains there, but not from Pickering where traders considered they had lost out to Whitby.

“There have been one or two heritage railways operating what you would call a public service. One still does for school children but it is very much the exception. One of the problems that has been referred to is the cost;..... the cost of running heritage equipment, even with volunteers, is still very expensive.”

Philip Benham (General Manager, NYMR)

There is clearly some scope to provide a transport service as well as a tourist experience on a number of heritage railways, and the opportunities will increase as the railways extend, particularly where they link with the national network. There are three ways in which such a service might be provided,

1. Additional trains provided by the heritage railway commercially or under contract with the local authority, such as the school train run by the Romney, Hythe & Dymchurch Railway in Kent.
2. Additional trains provided by a main line operator as part of their franchise agreement, or with financial support from a local authority, running over heritage railway tracks. Such an approach is proposed for the extension of London Midland trains towards Bewdley on the Severn Valley Railway and continues to be an ambition for the West Somerset Railway to have a main line service operating to Bishops Lydeard from the West of England main line near Taunton.
3. Additional heritage railway trains extending onto Network Rail infrastructure, as North York Moors trains do between Grosmont and Whitby. This would require the heritage railway to become a licensed operator and to meet railway group standards. Examples are the need to equip trains with TPWS

(Train Protection & Warning System) and train radio, periodic ultrasonic testing of axles and higher levels of insurance. Together with liabilities for main line delays, this means a step change in costs and competencies which may deter some railways. Alternatively, an independent operator, such as West Coast Railways might be contracted to provide such a service.

The Group considers local authorities should, where justified, encourage the provision of public transport services by heritage railways and that the Department for Transport should consider the benefits of services using heritage railway infrastructure to meet local transport needs, remunerating this, where necessary, through the franchise agreement.

Marketing and promotion

In general (and with some honourable exceptions), marketing and promotion are not strong points for heritage railways. This is changing as the competition for discretionary expenditure increases, and the HRA is addressing the problem. A step forward this year has been the promotion of a 'two for one' offer with a national newspaper developed by HRA with support from Visit England, Visit Scotland and Visit Wales.

All railways have websites, but in too many cases, these just provide information and do not give the opportunity to book tickets or join the supporter's association. Separate websites for different parts of the railway (operating company and supporters' association, for example) are a complication which is largely irrelevant to those enquiring about the

facilities offered or how to participate. Use of social media is mixed and the Group was left with the impression that it is not being fully exploited.

“The one area that is a constant frustration for me is websites and online bookings (...) There are some good ones but there are some that could do with some help. And we know it is not the fault of the railway that that website is not right, it is quite simply because the funds are not there for them to do that. (...) They spend a lot of time on infrastructure but in terms of bringing visitors in, in terms of the promoting the railway, the marketing side is the side that more help could be and should be given. And I think because of the increase in online bookings that is an area as a critical friend I’d like to see improved.”

Janet Uttley (Head of Industry Engagement, Visit England)

The railways have, for a generation, struck a chord with the visiting public and have been successful in attracting increasing passenger numbers. However, the question is whether they are changing quickly enough to continue to offer the level of customer service expected by an ageing and more demanding clientele. This was recognised by Paul Lewin (FR and HRA) who summed up the position well:

“All heritage railways suffer from an inability to meet the growing aspirations of ever more discerning customers.” Marketing involved matching the product to demand as well as well as promotion of the product, he said.

“We have not yet recognised the power of the tablet and the phone in the pocket. This is a challenge that HRA is trying to address, but it is a fast moving situation, and we always seem to be playing catch-up.”

Mark Smith (HRA)



*“The growing aspirations of ever more discerning customers”
Relaxing in the Ffestiniog Railway’s observation car. (Photo:
courtesy FR)*

Marketing is not generally one of the skillsets of staff on heritage railways and this is an area that needs to be addressed by the railways with the help of the HRA.

Most heritage railways could improve their activity through the social media by directly encouraging people to visit. Some of these railways have many of the basic options in place on their website such as timetables and fares, catering, volunteering and contact details. However, many of them are missing the online booking option, which is becoming increasingly important as a marketing technique.

As for the use of social media sites such as Facebook and Twitter, Heritage Railway lines should appeal directly more to those that ‘follow’ or ‘like’ their pages, building online relationships with their fans or followers. To encourage more people to visit the heritage lines, more could be done to

organise special occasions, such as birthday or themed events. One outstanding example is the “Day Out with Thomas” organised by the West Somerset Railway – a cartoon-themed event targeting a specific group (children), which adds extra motivation for potential visitors to the railway.

“The internet is becoming increasingly used for marketing. This last Christmas 80% of bookings were made by the internet and we do use Facebook and Twitter (...) and the beauty of it is that you can penetrate the market much more cheaply than the more traditional ways.”

John Wilson (Bressingham Steam Preservation Trust)

Retention of staff and skills.

Since the start of the railway preservation movement, there have been worries about the ability of railways to retain sufficient skilled staff, especially volunteers, to operate the railway. Originally, the concern was about the specialist skills such as boilermaking, required to continue steam operation. Later on, there was a concern that the sheer number of railways reopening would stretch the available labour resource too thinly. Neither has proved to be true. Engineering skills to maintain steam locomotives have been passed on to a new generation of people, the younger ones having been born after the end of steam on BR. Similarly, the numbers of volunteers working on heritage railways have continued to grow, stimulated in part by the growth in the number of preserved lines providing a local opportunity to volunteer.

Changing social attitudes and interests have also had a beneficial effect. In written evidence to the Group, Gordon Rushton (formerly General Manager of the Ffestiniog and also a former supporters' group chairman) pointed to the gradual change from a male dominated activity in the 1980s to a broader base of voluntary support involving women and indeed whole families today. Not only do they allow more to be achieved, but also actively involve a younger group of volunteers which have rejuvenated and refreshed the declining number of ageing male volunteers who were the pioneers.

Nevertheless, the need to continue to attract and retain a skilled workforce remains a principal concern for the witnesses to this inquiry. A number of factors have contributed to this concern:

1. The reduction in the number of 'early retirements' which brought a group of younger, skilled and relatively well off volunteers to railways during the 1990s. Similarly the increase in pensionable age is expected to squeeze the number of older people able to volunteer to work on heritage railways.
2. The rising cost of fuel which is starting to deter some volunteers or limit the numbers of days on which they can afford to undertake their duties. Many volunteers travel long distances to work on heritage railways, and require to drive because of the remote locations or anti-social hours involved.
3. The increasing complexity of railway operation, and the number of safety critical roles that require training, refreshing and regular assessment turns of duty, as well as those where the volunteer is actually driving, guarding, signalling or maintaining a train.

4. The wage rates that heritage railways can afford to pay are low and are not always sufficient to retain aspiring young staff.

“One of the problems of heritage railways is overreliance on volunteers (...) for instance the high costs of fuel put driving costs up. People don’t want to go so far to go for volunteering for their local railway, and buses don’t go so regularly. An ageing volunteer force [is one of the problems unique to heritage railways].”

Tim King (Shropshire’s Tourism Development Officer)

The larger workshops specialising in steam locomotive overhaul and repair at Crewe and Tyseley have a predominantly young workforce and attract a number of apprentices. Bob Meanley of Tyseley said that half of his staff of 18 were under the age of 30, and apprenticeships were arranged with Bournville College. Frank Paterson reported that the National Railway Museum had established a joint venture with Durham County Council to support apprenticeships at their museum at Shildon. Bill Ford (GCR) had five apprentices and a number of paid staff under the age of 40. The Great Central has a partnership with Vital, which has 26 apprentices who are gaining practical skills from work on the railway. Nick Ralls (SVR) described their plans for an academy to train around 10 apprentices on the railway.

“We have 18 employees at Tyseley (...) Half of my staff who work in the workshop are about or under the age of 30 (...) I think we have been incredibly successful in passing on skills to younger people and it is almost on a one on one basis.”

Bob Meanley (General Manager, Tyseley Works)

However, Mark Smith (HRA) indicated that overall, heritage railways were not recruiting at a sufficient rate to replace volunteers retiring. The better railways had youth groups to encourage new entrants. David Morgan (HRA) considered that HRA had a lead role in underlining the need and opportunities for apprentices with both BIS and the National Rail Skills Academy through Gil Howarth.

Bill Ford (GCR) reported that one of his apprentices had taken a job with East Midlands Trains, while Philip Benham (NYMR) said he had lost staff to the North Sea oil industry.

Increasingly, the railways were having to expand and improve the overnight accommodation for volunteers to reduce the need to travel and both West Somerset and Ffestiniog Railways had recently invested in additional hostel accommodation.

The skills taught were eminently transferable and in demand beyond the confines of the railways. Paul Lewin (FR) quoted civil engineering and forestry skills as examples. He said that as manufacturing had progressively been transferred overseas, the skills required to support manufacturing had migrated with them. In North Wales, the Ffestiniog was able to meet a wider demand for engineering skills than simply that of the railway. Frank Paterson suggested that it would be valuable if a National Vocational Qualification or its equivalent could be established for railway heritage skills. He gave as an example, the case of wood graining skills where the only suitable vocational training course available was in Florida. Sir William McAlpine regretted the lack of skills training opportunities in many local colleges. Mark Smith confirmed that it was sometimes difficult to support apprenticeships

properly because of the lack of suitable facilities at further education colleges.



Engineering skills: Boston Lodge works on the Ffestiniog Railway. (Photo:FR)

PART FOUR – CONCLUSIONS AND RECOMMENDATIONS

Sponsoring department. Heritage railways do not have a single sponsoring department in Government and as a consequence are sometimes overlooked when new legislation is framed that may have an unintended effect on their ability to trade or even to operate. In Scotland and Wales, most heritage railway issues are dealt with by the devolved Governments (although rail regulation, for example, is not a devolved issue). In England, there are three Government departments which have a relevant interest:

- Department for Transport in relation to operations and safety, together with the independent Office of Rail Regulation.
- Department of Culture, Media and Sport in relation to tourism and promotion of heritage railways as a major tourist product, particularly for overseas visitors.
- Department of Business, Innovation and Skills in relationship to skills training and apprenticeships.

Evidence from the railways themselves pointed towards DfT and ORR as the principal contact. They acknowledged the help of Her Majesty's Railway Inspectorate in meeting the challenges of operating historic railways to present day standards. The Ffestiniog acknowledged the role and importance of Welsh government in promoting tourism and heritage.

Tourism Officers and Visit England acknowledged that tourism was as much a business issue as a cultural one, but strongly supported the present arrangements. Their evidence indicated that tourism ministers understood the business

aspects of tourism and how the collection of small and medium enterprises (including the railways) came together to form the British tourism offer.

This split responsibility is clearly unsatisfactory and the Group recommends that the lead role on heritage railways should be taken by the Department for Transport. This does not diminish the roles played by DCMS and BIS which would remain unchanged. In our view, DfT should encourage a strong independent heritage railway sector, and consider this when Government is proposing additional or changed legislation and regulation. This is particularly important to avoid unintended consequences when heritage railways are included in legislation framed principally with the national network in mind.

Planning constraints. In general, heritage railways should benefit from the same permitted development rights as does Network Rail in relation to the national rail network. There is evidence that this principle has been eroded by the requirements of some planning authorities that heritage railways should seek planning consent for alterations or additions required for the railway's operational use. This appears to reflect some uncertainty by both planning authorities and railways in relation to the requirements, and should be clarified through appropriate guidance. Listed building consent would continue to be required for those structures that are listed, as would the appropriate consents for changes in a Conservation Area. Operational requirements should continue to be exempt from the requirement for planning permission, particularly where the building or structure (such as a water tower or station building) is of a traditional railway design.

Planning and the Transport & Works Act, 1992

The construction and operation of railways requires Parliamentary powers which was traditionally progressed through the Private Bill procedure. The Light Railways Act of 1896 provided a simpler order making procedure following a local public inquiry by an inspector. Originally designed to encourage the development of railways in rural areas, it proved ideal as a vehicle to transfer the powers to operate a section of railway from BR to a new private owner from the 1960s to the early 1990s. In England and Wales, this was replaced by the Transport & Works Act, 1992 but increasingly this has required more information to be provided such as environmental impact assessments. Whilst it is theoretically possible for a railway itself to apply for a TWA Order, in practice, the complications mean that a Parliamentary Agent is required to help to ensure an effective application.

This might be appropriate for a completely new project to restore a line. However, most established railways are required to use this procedure for the piecemeal extensions that are a feature of the growth of heritage railways, often extending a few hundred yards, or a mile or two at a time. In these cases, the process is bureaucratic and unnecessarily expensive. The Group believes that it should be possible to establish the principle of reconstructing a railway through the TWA process but that individual route sections could be approved subsequently through a simplified process, based on a simple pro forma application, probably made on line, following consultation with the local authority.

Public Transport. Heritage Railways should be encouraged to provide public transport services where appropriate with financial support from central or local government, based on

similar criteria used for the provision of additional train services or stations on the national rail network. The benefits might be more modest than some of the national rail schemes, but heritage railways' costs can be lower.

Heritage railways are particularly suited to providing “public tourist transport” even where a conventional public transport service would not be viable. This can help to reduce road traffic to sensitive areas such as National Parks and on congested roads to popular holiday resorts and should be encouraged through appropriate grant funding mechanisms.

This could provide valuable additional services for the local community but would require active encouragement from local government, perhaps with some support from central government through the franchise agreement, to initiate such development. The Department for Transport should also consider ways of facilitating access to a convenient interchange point with the national network by heritage rail operators.

Safety management systems

Trains on heritage railways operate at a lower speed than those on the national network and there are in general more staff around to observe abnormalities and to assist in case of problems. Nevertheless, safety must be the overriding priority for heritage railway operation. While traditional safety systems remain appropriate for these railways, it is right that processes are overhauled periodically and that the highest standards are maintained through continuing training and refreshment of competencies and measures to prevent fatigue especially in the case of older volunteers.

Some reaction from the smaller railways and museum sites suggested concern at the level of safety supervision. However, this is not reflected in the evidence from the larger railways or from HRA itself which clearly saw the need for effective safety management and of continuous improvement. Although heritage railways generally place a high priority on safety management, it is a concern that the rate of reportable incidents remain high compared with the national network and there clearly remains room for improvement. The Group endorses the need for continued vigilance and for railways to continue to communicate the message on safety priorities rigorously to their staff and supporters.



Traditional signalling equipment protects the safety of the line at Loughborough (Photo: GCR)

Marketing and the internet

Promotion and sales through websites and social media is not a strong point for many heritage railways and the scope exists to increase passenger numbers and attract more supporters through improvement in this area. In particular the approach should be to build on line relationships with Twitter followers or those on Facebook who 'like' the railway. The internet and social media have become the preferred method for many people, particularly younger customers, to find out about attractions such as heritage railways and this is particularly valuable in attracting overseas visitors to a sector where Britain clearly excels. It is important that the facility should be available for people to book tickets on line and to join supporters' associations.

The imaginative 'two for one' offer developed by HRA with Visit England this year is endorsed and an example of what can be achieved by the voluntary sector with the positive support of agencies.

Skills and Professional Qualifications

The work done by HRA, Severn Valley and other railways to establish vocational qualifications in railway heritage engineering and operational skills is endorsed and should be encouraged by Government and the professional institutions..

Compensation for service disruption

Around 2,000 charter trains run on the national rail network each year, of which 520 were hauled by steam locomotives in 2012.

The track access licence for train operators provides for payment of compensation for delays they have caused, for example through a locomotive failure or exceeding scheduled dwell times at stations. The costs can build up rapidly, particularly on busy stretches of railway where one train may delay many others. Liability for charter train operators has been limited to a total of just over £5,000, but the Office of Rail Regulation recently consulted on the removal of this cap. This could result in unlimited liabilities for operators, particularly those using heritage rolling stock, and evidence from Sir William McAlpine and operators West Coast and charter companies such as Vintage Trains was that such liabilities would not be insurable at a premium the operator could afford. The result would be a dramatic reduction in the number of charter trains run, or possibly their demise entirely. This in turn would affect the economies of a number of towns that are the destinations for these trains, such as Scarborough, Dartmouth (via Kingswear) or Canterbury. We are pleased to see that very recently, ORR has confirmed that the cap will not be removed and that further consultation will take place on a proposed 'capacity charge.' This does, however, illustrate the need for regulatory bodies to consider the effect of their proposals on heritage railways as well as on the national rail network around which such changes are generally formed.

Conclusions

The Group concludes that heritage railways have been a remarkable development over a period of sixty years, a phenomenon which was pioneered in Britain and at which the country excels. It has developed through the enthusiasm and dedication of a huge number of volunteers and yet now supports many paid staff and is a major contribution to Britain's tourism. The larger railways are significant contributors to the local economy of the areas they serve. They have proved effective at transferring traditional engineering and operating skills to a new generation of volunteers and are continuing to develop in this area. They have adapted to meet the challenges of a more regulated environment and are well placed to survive and prosper.

Future development will have at least as many challenges as the railways have faced in the past. In particular, they will have to adapt to meet the requirements of more demanding visitors in the future and to communicate with a new generation through media that they understand and use. They will have to continue to maintain and operate heritage railway equipment safely and reliably and to develop them to maintain growth and interest amongst visitors and volunteers. This will require understanding and support from Government in relation to legislative and regulatory changes designed principally for the national network.

PART FOUR - APPENDICES

Appendix one

Witnesses

The number of the session attended is shown in brackets after each name. The sessions took place on:

1. 31 January 2013
2. 14 February 2013
3. 12 March 2013
4. 23 April 2013

Philip Benham (2)

General Manager, North York Moors Railway. Formerly BR Area Manager, Kings Cross and latterly Director, Retail, Association of Train Operating Companies.

Geoffrey Claydon CB (3)

Vice President of the National Tramway Museum, Crich, Derbyshire, Director, Heritage Railway Association, formerly with Department for Transport.

Bill Ford (2)

Managing Director, Great Central Railway

Hugh Harkett (3)

Managing Director, North Norfolk Railway; Trustee of the Midland and Great Northern Railway Society, the line's supporting association.

Tim King (4)

Shropshire's Tourism Development Officer. Formerly Tourism Officer, West Somerset District Council.

Paul Lewin (1)

General Manager, Ffestiniog and Welsh Highland Railways; Board member, Heritage Railway Association.

Hon. Sir William McAlpine, Bt. (1)

Chairman, Railway Heritage Trust; President of the Transport Trust; Chairman of the Dartmouth Steam Railway and Riverboat Company; Chairman of the Romney, Hythe & Dymchurch Railway Company. President of the Railway Benevolent Institution (charity to help current and retired railway workers). Former owner of 'Flying Scotsman.' Owner, Fawley Hill Light Railway.

Bob Meanley (2)

General Manager, Tyseley Locomotive Works

David Morgan MBE TD (2)

Chairman, Heritage Railway Association, Chairman, Great Central Railway and President of both West Somerset and North Norfolk Railways. President, FEDECRAL (European association of heritage railways) and also WATTRAIN (World Association of Tourist Trains and Tramways). Member, Transport Trust and Maritime Heritage Trust.

Frank Paterson MBE (1)

Formerly Chairman of the Friends of the National Railway Museum; member, Advisory Board, National Railway Museum since 1978 (Chairman for ten years); former General Manager, British Rail Eastern Region, York; former President, Rotary Club of York.

Nick Ralls (1)

General Manager, Severn Valley Railway.

Mark Smith (2)

*Vice Chairman, Heritage Railway Association, formerly
Managing Director, West Somerset Railway*

Tony Tomkins (3)

*Business Development Manager, Leighton Buzzard Narrow
Gauge Railway, Bedfordshire (also HRA adviser on
environmental issues)*

Jim Trotman (4)

*Community Rail Partnership Officer, Lakes Line and Furness
Line and former Tourism Officer for Lancaster*

Janet Uttley (4)

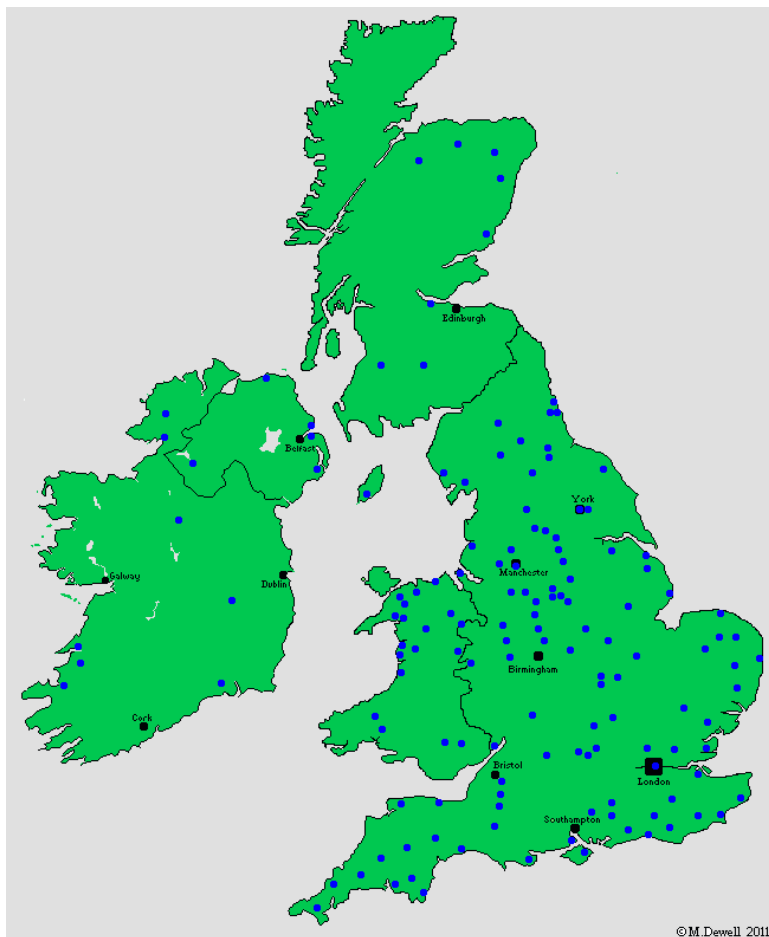
Head of Industry Engagement, Visit England

John Wilson (3)

*Director, Bressingham Steam Preservation Trust, Diss,
Norfolk and former senior railway manager with Network Rail
and British Rail Eastern Region.*

Appendix Two

Location of Heritage Railways in the United Kingdom and Ireland



List of Heritage Railways and Associated Societies in the United Kingdom

Organisation	Constituency
"Steam" Museum of the GWR	North Swindon
71000 (DoG) Steam Loco Trust Ltd	Warrington North
A1 Steam Locomotive Trust	Darlington
Almond Valley Heritage Trust	Livingston
Aln Valley Railway Society	Berwick upon Tweed
Amberley Chalk Pits Museum	Arundel & South Downs
Anglesey Central Railway (2006) Ltd	Ynys Mon
Avon Railway Trading Company	Kingswood
Ayrshire Railway Preservation Group	Ayr, Carrick & Cumnock
Bahamas Locomotive Society Ltd	Keighley
Bala Lake Railway Ltd	Dwyfor Meirionnydd
Barrow Hill Engine Shed Society	North East Derbyshire
Beamish Museum	North Durham
Bideford Railway Co, Ltd	Torrige & North Devon
Birmingham Railway Museum Trust Ltd	Birmingham Yardley
Bluebell Railway Plc	Lewes and Wealden
Bodmin & Wenford Railway Plc	North Cornwall
Bredgar & Wormshill Light Railway	Sittingbourne & Sheppey
Bridgnorth Castle Hill Railway Co Ltd	Ludlow
Bristol Harbour Railway	Bristol West
Bure Valley Railway 1991 Ltd	North Norfolk
Burry Port & Gwendraeth Valley Railway Company Limited.	Carmarthen East & Dinefwr
Cambrian Railways Trust	North Shropshire
Central Tramway Co (Scarborough) Ltd	Scarborough & Whitby
Chasewater Light Railway & Museum Co	Lichfield
Chinnor & Princes Risborough Rly	Henley

Cholsey & Wallingford Rly Preservation Soc	Wantage
Churnet Valley Railway (1992) Plc	Staffordshire, Moorlands
Cleethorpes Coast Light Railway	Cleethorpes
Corris Railway Co Ltd	Dwyfor Meirionnydd
Cravens Heritage Trains	Milton Keynes South
Coln Valley Railway, CVR 2006 Ltd	Braintree
Darlington Railway Centre and Museum	Darlington
Dart Valley Railway PLC	Totnes
Dean Forest Railway Co Ltd	Forest of Dean
Derwent Valley Light Railway Society	York Outer
Dolgarrog Railway Society	Aberconwy
Downpatrick & County Down Railway Society	South Down
East Anglia Transport Museum,	Waveney
East Anglian Railway Museum	Harwich & North Essex
East Kent Railway	Dover
East Lancashire Railway	Bury North
East Somerset Railway	Somerton & Frome
Ecclesbourne Valley Railway Association	Derbyshire Dales and Mid Derbyshire
Eden Valley Railway Trust	Penrith & The Border
Electric Railway Museum	Kenilworth & Southam
Elsecar Heritage Railway Ltd	Barnsley East
Epping Ongar Railway	Brentwood & Ongar
Exbury Gardens Steam Railway	New Forest East
Festiniog Railway Company	Dwyfor Meirionnydd and Arfon
Foxfield Light Railway Society Ltd	Staffordshire Moorlands
Furness Railway Trust	Westmoreland & Lonsdale
Garw Valley Railway Company	Ogmore
Glasgow Museum of Transport	Glasgow Central
Glen Tramway Preservation Company Ltd	Shipley

Glenfinnan Station Museum Trust	Ross, Skye & Lochaber
Gloucester Railcar Trust Ltd	South Swindon
Gloucestershire & Warwickshire Steam Rly	Tewkesbury
Glyn Valley Tramway Trust	Clwyd South
Glyn Valley Tramway & Industrial Heritage Trust	Clwyd South
Great Central Railway (Nottingham) Ltd	Rushcliffe
Great Central Railway Plc	Loughborough and Leicester West
Great Northern & East Lincs Railway plc	Louth & Horncastle
Great Orme Tramway	Aberconwy
Great Western Society Ltd	Wantage
Great Whipsnade Railway	South West Bedfordshire
Gwili Railway Co Ltd	Carmarthen West & Pembrokeshire South
Headhunters Barber Shop & Rly Museum	Fermanagh & South Tyrone
Hollycombe Steam Collection	Chichester
Isle of Wight Railway Co Ltd	Isle of Wight
Keighley & Worth Valley Railway	Keighley
Keith & Dufftown Rly Association	Moray
Kent & East Sussex Railway Co Ltd	Ashford and Bexhill & Battle
Kirklees Light Railway Co Ltd	Dewsbury
Lakeside & Haverthwaite Railway	Westmoreland & Lonsdale
Launceston Steam Railway	North Cornwall
Lavender Line Preservation Society	Wealden
Leadhills & Wanlockhead Rly	Dumfriesshire, Clydesdale & Tweeddale
Leighton Buzzard N G Rly Soc Ltd	South West Bedfordshire
Lincolnshire Coast Light Railway	Boston & Skegness
Lincs Coast Light Rly Hist Vehicles Trust	Cleethorpes
Llanelli & Mynydd Mawr Rly Co Ltd	Llanelli

Llangollen Railway Plc	Clwyd South
Locomotion - The NRM at Shildon	Bishop Auckland
London & North Western Railway Society	Berwick Upon Tweed
Lynmouth & Lynton Lift Co	North Devon
Lynton & Barnstaple Railway Trust	North Devon
Manchester Tramway Company	Blackley & Broughton
Merseyside Tramway Preservation Society Ltd	Wallasey
Mid Hants Railway Ltd	East Hampshire
Middleton Railway Trust Ltd	Leeds Central
Midland Railway Trust Ltd	Amber Valley
Mid-Norfolk Preservation Trust	Mid Norfolk
Mid-Suffolk Light Railway Museum	Central Suffolk & North Ipswich
Modern Electric Tramways Ltd (Seaton)	Tiverton & Honiton
Moseley Railway Trust	Newcastle-under-Lyme
Museum of Science and Industry Manchester	Manchester Central
National Museums Scotland	Edinburgh East
National Railway Museum	York Central
Nene Valley Railway Ltd	North West Cambridgeshire
North Bay Railway	Scarborough & Whitby
North Eastern Loco Preservation Group	Tynemouth
North Gloucestershire Rly Co Ltd	Tewkesbury
North Norfolk Railway Plc	North Norfolk
North Tyneside Steam Railway Assoc	Tynemouth
North Yorkshire Moors Railway	Thirsk & Malton and Scarborough & Whitby
Northampton Steam Railway Ltd	Northampton South and Deventry
Peak Rail Plc	Derbyshire Dales
Perrygrove Railway	Forest of Dean
Plym Valley Railway Ltd	South West Devon

Pontypool & Blaenavon Rly Co (1983) Ltd	Torfaen
Quainton Railway Society Ltd	Buckingham
Railway Preservation Soc of Ireland	East Antrim
Ravenglass & Eskdale Rly Co Ltd	Copeland and Westmoreland & Lonsdale
Rheilffordd Llyn Padarn	Arfon
Ribble Steam Railway	Preston
Romney Hythe & Dymchurch Lt Rly Co	Folkestone & Hythe
Rother Valley Railway Ltd,	Bexhill & Battle
Ruislip Lido Railway Society	Ruislip, Northwood & Pinner
Rushden, Higham and Wellingborough Railway Ltd	Wellingborough
Rutland Railway Museum	Rutland & Merton
Scottish Railway Pres Society	Linlithgow & East Falkirk
Severn Valley Rly (Holdings) Plc	Wyre Forest and Ludlow
Shackerstone Railway Soc Ltd	Bosworth
Sir Nigel Gresley Loco Pres Trust Ltd	Scarborough & Whitby
Sittingbourne & Kemsley Lt Rly Ltd	Sittingbourne & Sheppey
Snowdon Mountain Railway	Arfon
Somerset & Dorset Railway Heritage Trust. Midsomer Norton Station Project	North East Somerset
South Devon Railway Trust	Totnes and Central Devon
South Tynedale Railway Pres Society	Penrith & The Border
South West Main Line Steam Co	Yeovil
Southern Locomotives Ltd	South Dorset
Southwold Railway Trust	Suffolk Coastal
Spa Valley Railway	Tunbridge Wells
St. Albans Signal Box Preservation Trust	St Albans
Stainmore Railway Co Ltd	Penrith & The Border
Steeple Grange Light Railway Co Ltd	Derbyshire Dales

Strathspey Railway Co Ltd	Inverness, Nairn, Badenoch & Strathspey
Swanage Railway Co Ltd	South Dorset
Swindon & Cricklade Railway Ltd	North Wiltshire and North Swindon
Talylyn Railway Co	Dwyfor Meirionnydd
Tanfield Railway Co Ltd	Blaydon
Teifi Valley Railway Ltd	Ceredigion
Telford Steam Railway	Telford
The Flour Mill Ltd	Forest of Dean
The Kingdom of Fife Rly Preservation Society	North East Fife
The Royal Deeside Rly Preservation Soc	West Aberdeenshire & Kinkardine
Threlkeld Quarry and Mining Museum	Copeland
Tramway Museum Society	Derbyshire Dales
Underground Rly Rolling Stock Trust	Aylesbury
Vintage Carriages Trust	Keighley
Volks Electric Railway	Brighton Kemptown
Weardale Railway Trust	North West Durham
Wells & Walsingham Light Railway	North Norfolk and Broadland
Welsh Highland Railway Ltd	Dwyfor Meirionnydd
Welshpool & Llanfair LRP Co Ltd	Montgomeryshire
Wensleydale Railway Association Limited	Richmond (Yorks)
West Lancashire Light Railway Assoc	South Ribble
West Somerset Railway Plc	Bridgwater & West Somerset and Taunton Deane
Western Locomotive Association	Ludlow
Wisbech and March Bramley Line Ltd	North East Cambridgeshire
Yorkshire Dales Rly Museum Trust	Skipton & Ripon

Appendix Three

All Party Parliamentary Group on Heritage Rail

Value of Heritage Railways Questionnaire

1. Name of Railway.....
2. Length.....
3. Passenger numbers 2012.....
4. Number of operating days each year.....
5. Gross annual income 2012.....
6. Structure (PLC, Charity, unincorporated body).....
7. Number of staff employed (actual numbers and full time equivalent posts).....
8. Number of regular volunteers.....
9. Number of others involved (e.g. members of supporters association).....
10. Is the railway in receipt of any public sector grant or revenue support?.....
11. Railway contribution in terms of taxes paid, if known, for example local rates, VAT, NI and payroll taxes, other taxes?.....
12. Does the railway have a 'buy local' policy?.....
13. Does the railway contribute to local or national charities?.....
14. Planned investment over five years.....
15. Does the railway plan to increase its route mileage or the number of stations over the next five years?.....
16. Do you expect to increase the number of paid staff over the next five years?
17. What are your main concerns for the future of your railway?
18. What are the principal prospects for growth over the next five years?
19. Do you have any examples of policy, legislation or regulation that is hindering the development of the railway?
20. What changes in policy, legislation or regulation would you like to see that would help to stimulate further growth and development of your railway?

Railways, tramways and museums completing the questionnaire:

Bluebell Railway	Bo'ness & Kinneil
Bristol Harbour Railway	Butterley (MRC)
Central Tramway, Scarborough	Chasewater Railway
Dean Forest Railway	Didcot Railway Ctr
East Anglia Railway Museum	East Kent Railway
East Somerset Railway	East Suffolk Light Rly
Elsecar Heritage Centre	Embsay & Bolton Rly
Ffestiniog & Welsh Highland	Foxfield Railway
GCR (Nottingham) Ltd	Glos & Warwickshire Rly
Great Central Railway	Irchester NG Rly Museum
Isle of Wight Steam Railway	Keith & Dufftown
Kent & East Sussex Railway	Lakeside & Haverthwaite
Leadhills & Wanlockhead Lt Rly	Leighton Buzzard NG Rly
Lincolnshire Coast Light Rly	Lincolnshire Wolds
Lynton & Barnstaple Railway	Mid Suffolk Light Rly
National Railway Museum	North Bay Scarborough
Rly Pres Soc of Ireland	Ravenglass & Eskdale
Scottish Industrial Rly Museum	Seaton Tramway
Severn Valley Railway	Sittingbourne & Kemsley
Snowdon Mountain Railway	Somerset & Dorset RHT
South Devon Railway	South Tynedale Rly Pres Soc
Swanage Railway	Tanfield Railway
Tyseley Loco Works	West Somerset Railway
Yeovil Railway Centre	

Appendix Four

Links to the National Network

The table below lists heritage lines (excluding museum sites and miniature railways) with existing or planned links to Network Rail over the next five years. In total, 37% of lines have a connection at the moment, but 52% will have when present extension plans come to fruition.

	Linked to NR with scheduled through trains	Linked to NR but no regular passenger services	Inter change station	Plans to link to NR	Plans for Inter change station	No rail connection planned
England	2	9	14	8	3	26
Wales	nil	1	3	nil	nil	10
Scotland	nil	1	1	2	nil	4
Total GB	2	11	18	10	3	40



Main Line Charters: 520 steam charter trains ran on the national rail network in 2012, with benefits to the economy of the towns they served. A Vintage Trains charter, operated by West Coast Railways passes Dawlish in 2012. (Photo: Oliver Goodman)



Carrying the Torch. *The Cleethorpes Coast Light Railway was one of fourteen heritage lines to carry the Olympic Torch on its tour of Britain in 2012. (Photo: Bill Gladwell)*

[The All Party Parliamentary Group on Heritage Rail meets monthly during the Parliamentary session. Details from the Secretary, Chris Austin at austinca2@googlemail.com]