



Heritage Railways and Covid-19 – Getting Back on Track

Heritage railways have experienced wide ranging challenges due to the Covid-19 pandemic. However, some have demonstrated notable resilience in face of these difficulties, benefiting from strategies that they have employed themselves or that have been implemented by the heritage railway sector at large. Drawing upon primary evidence generated by interviews with seven representatives of heritage railways across England and a set of contextual secondary sources, this report highlights a selection of these approaches to discuss their wider applicability across the heritage sector to support resilience to challenges in the future.

Introduction

Heritage railways, like the broader heritage sector, experienced an unprecedented 2020. The impacts of the coronavirus (Covid-19) pandemic have been far reaching within the heritage sector, cutting across economic, cultural, political and social factors, and the sector as a whole has undoubtedly suffered.

Whilst the resilience shown towards the pandemic has varied across the sector, heritage railways have arguably demonstrated notable flexibility and adaptability in response to the challenges posed. This report illustrates the strategies that seven heritage railways have employed to navigate the effects of the pandemic. More specifically, these strategies relate to retaining volunteers, revenue development and fundraising options as well as collaborative reactions to the new challenges brought on by the pandemic. These examples offer inspiration to other heritage railways and the wider heritage sector regarding approaches that could be employed to increase resilience to the effects of the current public health emergency and to future challenges.

It is important to note that this report does not argue that heritage railways are in a more robust or secure position than the heritage sector more generally, nor does it suggest that the approaches presented here have been adopted universally by heritage railways in England. Indeed, the long-term impacts of Covid-19 on heritage railways are still unknown,¹ and some heritage railways remain in a dire situation.

¹ Railway Technology (2021): <https://www.railway-technology.com/features/keeping-heritage-railways-alive-during-covid19/>

1. Heritage railways in England and their benefits

In 1960 Leeds' Middleton Railway became the first standard-gauge line to be preserved in England, with the Bluebell Railway in East Sussex (also established in 1960²) being the first to carry passengers along its preserved line. The sector has grown steadily over the past 60 years, and there are now 156 operational heritage railways and 26 associated museums and steam centres in the UK³, bringing a wide range of benefits both locally and nationally.

1.1 Economic benefits

Heritage railways bring important economic benefits to the areas in which they operate by attracting tourism and encouraging substantial spending on local services. UK wide research undertaken for the All-Party Parliamentary Group on Heritage Rail identified a mean benefit of around 2.7 times the railway's turnover to local economies that operate heritage railways⁴ and nationally contribute around £400m to the British economy⁵.

Heritage railways also play an important role in England's heritage tourism offer, and collectively drew in around 13 million visitors in 2019⁶, along with the associated financial benefits brought by such numbers of tourists. They also represent some of the largest tourist attractions in their respective regions. For example, the Bodmin & Wenford Railway regularly attracts around 60,000 visitors per year, making it one of the biggest heritage attractions in Cornwall.

These railways also play an important role in the regeneration of towns by generating employment and drawing in tourists to their immediate surroundings, notably in the cases of the railways situated in Ramsbottom (Greater Manchester) and Loughborough⁷.

1.2 Employment and skills development

Heritage railways provide employment and for around 4,000 people (full time equivalent), as well as skills training and apprenticeships, many of which cover heritage skills⁸. Importantly, these jobs are frequently located in areas of the country where employment opportunities, particularly for skilled workers, are low.

² Middleton Railway (2021): <https://www.middletonrailway.org.uk/index.php/museum-collection/little-railway-big-history>

³ Heritage Railway Association (2020) Email Communication 26.11.2020

⁴ All Party Parliamentary Group on Heritage Rail, report on the Value of Heritage Railways (2013): <http://www.bramleyline.org.uk/Value-of-heritage-rail.pdf>

⁵ All-Party Parliamentary Group on Heritage Rail, Steaming Ahead? Heritage Railways, Coal and the Future of Steam Locomotives in the United Kingdom, July (2019): <https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5d3ae3e3b1b9770001a03658/1564140536632/Coal+-+APPGHR+Report+-+July+2019.pdf>

⁶ HRA News Magazine, April (2020): <https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5eaabf63525cf600be6f3c14/1588248430507/HRA+News+160+April+2020.pdf>

⁷ All-Party Parliamentary Group on Heritage Rail, Steaming Ahead? Heritage Railways, Coal and the Future of Steam Locomotives in the United Kingdom, July (2019): <https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5d3ae3e3b1b9770001a03658/1564140536632/Coal+-+APPGHR+Report+-+July+2019.pdf>

⁸ Ibid

1.3 Volunteering opportunities

Heritage railways offer a productive pastime for 18,500 volunteer supporters who devote their own time and energy towards maintaining and developing these important places. 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, these railways can offer a sense of achievement, outdoor exercise, and social interaction⁹.

1.4 Connections to the past

Heritage railways also keep a bygone era alive, and their continued operation provides a tangible connection to the past that we can celebrate and learn from¹⁰. Furthermore, Britain's prominent role in both the invention and development of this mode of transport, as well as the worldwide impact it has had, means that its preservation is of both national and international importance.

2. The impacts of Covid-19 on the sector

As with the heritage sector at large, Covid-19 has had a tremendous impact on all aspects of the operation of heritage railways. From interviews with representatives of seven heritage railways in England, five key areas impacted by Covid-19 were identified.

2.1 Revenue loss

Visitor and passenger numbers have declined significantly owing to both the enforced closures of the railways (some which, in March 2021, had remained closed since March 2020), and, when railways were able to reopen, individuals choosing to not visit due to health concerns. For example, the Gloucestershire Warwickshire Steam Railway experienced a 77% drop in passenger numbers in 2020 from the 125,000 it welcomed in 2019¹¹. Visitors are the lifeblood of heritage railways; unlike the UK's national rail network, in normal circumstances they receive no revenue support or other public funding for their daily operations¹². This situation has led to a disastrous loss of revenue and raised concerns about heritage railways' financial viability. This effect has been multiplied by railways' sensitivity to fluctuations in revenue owing to their high operational costs, primarily due to the cost of maintaining, fuelling, and running the engines and their tracks¹³.

⁹ All Party Parliamentary Group on Heritage Rail, report on the Value of Heritage Railways (2013):

<http://www.bramleyline.org.uk/Value-of-heritage-rail.pdf>

¹⁰ Railway Technology (2021): <https://www.railway-technology.com/features/keeping-heritage-railways-alive-during-covid19/>

¹¹ BBC News, Steam Railway Fund Needed to Survive Pandemic (2021): <https://www.bbc.co.uk/news/uk-england-gloucestershire-55647029>

¹² All Party Parliamentary Group on Heritage Rail, report on the Value of Heritage Railways (2013):

<http://www.bramleyline.org.uk/Value-of-heritage-rail.pdf>

¹³ All-Party Parliamentary Group on Heritage Rail, Steaming Ahead? Heritage Railways, Coal and the Future of Steam Locomotives in the United Kingdom, July (2019):

<https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5d3ae3e3b1b9770001a03658/1564140536632/Coal+-+APPGHR+Report+-+July+2019.pdf>

2.2 Additional costs

New costs arising from the need to protect visitors and staff from Covid-19 have exacerbated the effects of revenue loss. Measures that have been taken include the deep cleaning of passenger carriages, the rearrangement of museum and engine shed spaces, as well as the purchase of PPE equipment. Such necessities have been expensive, with the Llangollen Railway in Wales spending around £100,000 on PPE alone in order to reopen¹⁴. This has placed further financial burdens on the already challenging economics of running heritage railways.

2.3 Operational and financial planning

While the running of a heritage railway is an intricate undertaking under normal conditions, the pandemic has introduced new uncertainties and increased operational challenges. Fuelling, maintaining and scheduling the running of locomotives, day-to-day and for special events, are time and resource-intensive activities, and Covid-19 has exacerbated these challenges. This has led to many special events being cancelled or rescheduled, resulting in railways having to plan on a more ad-hoc basis, and at shorter notice when re-openings were permitted.

Covid-19 has made short- and long-term financial planning even more complicated, given the doubts around re-opening, and uncertainties around visitor and staffing numbers with their associated financial implications. At the same time, additional costs were created due to the pandemic to enable access or develop new ways of connecting and working digitally. As a result, many heritage railways have found it difficult to budget accurately (which is vital, given their high operational costs) and therefore to efficiently run their enterprises.

The increased operational and financial challenges faced by heritage railways resulted in some taking the difficult decision to remain closed throughout 2020, compounding the existing financial pressures they face.

2.4 Volunteer fluctuations

Many heritage railways saw their volunteer numbers decline due to either having to close their operations, or some volunteers' reluctance to return due to increased health risks and vulnerability. The latter point is particularly important given the composition of heritage railways' volunteers, many of whom are older, and are thus at higher risk of the negative health impacts of the virus. The effect of this decline in volunteer numbers has been two-fold. Firstly, as with the heritage sector as a whole, volunteers play a vital role in the operations of heritage railways, specifically by maintaining the locomotives and the railways' infrastructure, assisting with the records and archives of each railway, fundraising, and participating in the day-to-day operation of the railways (to name a few). Furthermore, some volunteers have chosen to end their commitments (even when sites re-opened) until they regarded the situation as safe enough for them to return, with others even choosing to end their volunteering commitments permanently. Consequently, without the availability of these volunteers to undertake vital tasks, the operational abilities of the railways are curtailed and placed in doubt.

¹⁴ BBC News, Coronavirus: Heritage Railways in 'Precarious Situation' (2020): <https://www.bbc.co.uk/news/uk-wales-53614567>

Secondly, there are the impacts of these closures on the wellbeing of the volunteers themselves, many of whom gain important skills through their work, as well as benefiting from exercise and social interaction.

2.5 Exacerbating existing challenges

The above factors have compounded and exacerbated those challenges that have affected the heritage railway sector prior to the pandemic. Interviewees noted that responding to the public health emergency has dissipated focus and energy from addressing and overcoming challenges, such as the acquisition of coal for steam engines, and meeting the increasing cost of running these railways. It has instead focused a great deal of industry attention towards matters exclusively created by the pandemic.

3. How are heritage railways attempting to get back on track?

This section uses primary (emails and interviews with industry experts) and secondary sources to highlight some of the measures that heritage railways have taken to mitigate the challenges posed by the pandemic. Many of these actions are not unique to the heritage railways sector and could inspire other heritage sector organisations to follow, and by doing so, assist in increasing the sector's overall resilience to the pandemic as well as future challenges.

3.1 Accessing public funds

Some heritage railways have been particularly successful in applying for official financial support, notably from the first round of the Culture Recovery Fund for Heritage. Towards the end of 2020, England's heritage railways (and affiliated locomotive organisations) had obtained more than £8.2 million in financial support from this fund¹⁵, with sums ranging from the £20,000 awarded to the Colne Valley Railway Preservation Ltd, to the £906,000 awarded to the Severn Valley Railway¹⁶. Heritage railways represented 8% of the organisations awarded funding (36 out of 445 organisations), a notable proportion considering that many heritage railways are small organisations, frequently seasonal in their opening, and often volunteer-led.

Many of the organisations interviewed credited this success to the design of grant application processes that allowed organisations with less bid-writing experience to compete for funding. Additionally, several strategies were identified that may have contributed to railways being awarded a notable number of these grants.

Some railways linked their success to the efforts of umbrella bodies like the Heritage Railway Association (HRA)¹⁷. The HRA is a voluntary run trade association representing Heritage and Tourist railways, related Museums, Tramways, Cliff Lifts, Railway Preservation Groups and related organisations, having some 300 corporate

¹⁵ Historic England, 445 Heritage Organisations Boosted by Culture Recovery Fund (2021)

<https://historicengland.org.uk/whats-new/news/445-heritage-organisations-boosted-by-culture-recovery-fund/>

¹⁶ NLHF, Heritage Railways Saved from 'Serious Jeopardy' (2020):

<https://www.heritagefund.org.uk/news/heritage-railways-saved-from-serious-jeopardy>

¹⁷ The HRA, Who we are and what we do (2021) <https://www.hra.uk.com/the-hra-who-we-are-and-what-we-do>

members. More than 180 of its member organisations are regularly open to the public, with 156 of these operating with passengers. Their members include 100 societies, funding groups, and locomotive and carriage owning trusts - comprising almost every preserved railway, tramway, cliff railway and railway museum in the UK. Throughout 2020 the HRA actively signposted organisations to the financial support available for heritage railways and provided guidance and information on what form this support takes, the application processes, and the submission dates. By adopting such an approach, one of the sector's main bodies has helped many heritage railways to take maximum advantage of the public funds that were available.

Furthermore, there has been a level of openness between railways organisations while applying for support from the Culture Recovery Fund for Heritage. For example, Emma Jhita, previously of the Didcot Railway Centre, noted that “many railways held the opinion that ‘we’re going to go for this [funding] and we don’t know if we’re going to be useful, but we’re quite happy to talk to others and share our thoughts on the applications’”¹⁸. This openness enabled heritage railways organisations to benefit from mutual support, advice on the application process, guidance and information on the available funding options.

Key strategies – accessing public funds

- ✓ Sector umbrella bodies should signpost and provide guidance on how to seek and apply for public funds,
- ✓ Ensure an open and supportive spirit is fostered between sector organisations when applying for recovery funds in order to share experiences and advice.

3.2 Fundraising and philanthropy

Several heritage railways have been particularly successful at generating funds through their proactive engagement with benefactors, potential visitors, and supporters. Those that have been successful have attributed this in part to the speed at which they set up their fundraising activities. For example, the Severn Valley Railway completed a prompt review and revisions of their cash flow projections in light of the lockdown. This review identified the need for additional finances (as much as £250,000), so they immediately launched a fundraising programme¹⁹. A similar approach was taken by the **North Yorkshire Moors Railway through their crisis appeal, which was set up soon after the first lockdown to support the charity during the pandemic**. Various online donation options and a fundraising auction had raised **£440,000** at the close of the appeal. The Keighley & Worth Valley Railway (KWVR) adopted a similar proactive approach, stating that *‘at the start of lockdown we bombarded the railway’s followers with requests for money using social media’*²⁰, an undertaking which by early 2021 had helped secure around £400,000 from private donations. By proactively organising and expanding their fundraising programmes at the earliest opportunity and ensuring the new requests for support were loud and visible, these organisations maximised the time available to raise

¹⁸ Emma Jhita, Didcot Railway Centre (2021): Interview 18.02.2021

¹⁹ HRA News Magazine, April (2020):

<https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5eaabf63525cf600be6f3c14/1588248430507/HRA+News+160+April+2020.pdf>

²⁰ David Pearson, Keighley & Worth Valley Railway (2021) Interview 10.02.2021

funds, and enabled the railways to draw upon their supporters' initial enthusiasm, which might have waned as the lockdown persisted.

Other heritage railways stressed the importance of continuing to fundraise through the lockdowns for programmes that would have sought financial support in 2020 regardless of the pandemic. For example, Emma Jhita, representing Didcot Railway centre in our interviews, stated that “we feel it is important to ask for support for a tangible project, at such a challenging time”. By adopting such an approach, the Didcot Railway Centre is ensuring that in the post-pandemic world they will be able to continue with important non-Covid-19 related projects that are vital to the long term running of the railway.

Comments from the Keighley & Worth Valley Railway (KWVR) further highlight the benefits of this strategy: “you’ve got to keep these projects going...you can’t just let these projects drift, if you don’t do them, it will put you back several years”²¹. Adopting such an approach will help ensure that progress is made with important projects that might otherwise have been side-lined and delayed (if they were paused during the pandemic), and so potential future problems are avoided, or at least mitigated.

Key strategies - fundraising and philanthropy

- ✓ Proactively organise and expand fundraising programmes at the earliest opportunity,
- ✓ Continue to fundraise for non-pandemic projects.

3.3 Simplify online donations

During the March 2020 lockdown, some railways rapidly overhauled their websites to quickly create fundraising campaigns and to improve the donation making process. Several railways commented on the difficulties that would-be supporters had previously experienced when trying to donate, a case in point being the KWVR. With their original (pre-Covid-19) website “it was really difficult to give money, our systems were hopeless and we were asking people to send cheques in... and the online giving system just didn’t work”²². A fast overhaul of their website after the onset of lockdown allowed donations to be made much more easily with only a few clicks of a mouse.

Fundraising appeals have undoubtedly played a significant role in increasing donations, but website overhauls simplify donations have also paid dividends when encouraging supporters to donate, and this in part explains how some heritage railways have successfully fundraised large sums of money.

Key strategies – simplify online donations

- ✓ Overhaul online donations processes to make them visible to potential supporters and simple to complete.

²¹ David Pearson, Keighley & Worth Valley Railway (2021) Interview 10.02.2021

²² Ibid

3.4 Invest in IT infrastructure

Several railways improved their IT infrastructure early in the first lockdown and have better navigated the pandemic as a result. For example, The Swanage Railway highlighted that “in terms of communication to volunteers and staff [it] was something we had to overhaul really quickly and very early on in the pandemic”²³. Those organisations that did reaped the benefits of smoother and more efficient communications between their departments, staff, volunteers, and supporters during what was (and remains) a most challenging period. The experience of the KWVR indicates that the adoption of such an approach “enabled us to remain in contact with our staff and volunteers... there’s obviously no way we could have done what we have done without it”²⁴. Without this upscaling, the ability of railway staff and volunteers to communicate effectively would have been severely curtailed (especially as they are site based enterprises and communication would normally take place face to face on site), meaning that vital railway work could not have been coordinated and undertaken during the enforced closures to the public. Investment in IT infrastructure also enabled certain employees to continue to their work from home, something that would have been difficult otherwise. Both points placed some railways in a position from which they could react quickly to the dynamic and ever-changing situations brought about by the pandemic, and importantly ensured that preparations to aid the re-opening of the railways could continue unabated. Furthermore, it facilitated the continued engagement with volunteers and supporters, which has been vital to [raising funds](#) for the railway.

Key strategies – invest in IT infrastructure

- ✓ Update IT infrastructures to enable vital communications with staff, volunteers, and supporters, and to ensure that vital works (onsite and remotely), support and fundraising activities can continue.

3.5 Engaging with supporters

Railways’ IT infrastructure improvements have driven positive online engagements with supporters during the pandemic, which have in turn enabled successful fundraising appeals. Many interviewed railways stated that although they maintained an online presence prior to Covid-19 and contacted supporters with news, in some cases this arrangement was not fit for purpose and they have consequently sought to expand and improve their engagement over the lockdown period. Organisations have achieved this by regularly updating their websites with fresh and relevant content while their physical sites remain closed. The Didcot Railway Centre for example created two new blogs and began publicising events and initiatives during lockdown that were to be completed (or continued) once lockdown was reduced²⁵. The effects of such a strategy have been two-fold. It has ensured that potential visitors and supporters remain connected to the railway, and thus maintain their interest in potentially visiting when restrictions are reduced, and helped maintain their desire to continue supporting the organisation. Emma Jhita, of Didcot railway centre, states how vital this activity was for engaging with their supporters as “getting regular updates on the overhaul of a locomotive they care about or have contributed towards

²³ Gavin Johns, Swanage Railway (2021): Interview 15.02.2021

²⁴ David Pearson, Keighley & Worth Valley Railway (2021) Interview 10.02.2021

²⁵ Emma Jhita, Didcot Railway Centre (2021): Interview 18.02.2021

can't be underestimated"²⁶. It also sustained the message that the heritage railways are open to donations should supporters and friends wish to contribute²⁷.

Several heritage railways mentioned the importance of positive messaging as part of this engagement with supporters, which has helped to ensure that their support was forthcoming and maintained. Gavin Johns of the Swanage Railway observed how "there's a balance to be had, not to say that it's so severe and be so gloomy that it's not worth bothering with [the railway]... you need to try and level it so that people see that the issue is realistic but it is worth saving"²⁸. Adoption of such a measured tone of voice ensures that supporters are informed about the issues at hand, how their support will help reach realistic goals, and avoid the impression that they are being asked to support a lost cause. It also helps reduce the apathy that supporters might otherwise feel if news was continually negative.

Key strategies – engaging with supporters

- ✓ Regularly engage with supporters via a variety of media to make them feel valued,
- ✓ Make sure supporters are informed about the issues at hand and how their support will help reach realistic goals,
- ✓ Adopt, when appropriate, a positive voice to avoid creating the impression amongst supporters that they are being asked to support a lost cause, or one that will generate apathy.

3.6 Engaging with and drawing upon volunteers

The pandemic has placed a great strain on volunteers. Many have been forced to suspend their activities, and other are nervous about returning on site for health reasons. Despite these challenges, heritage railways have been relatively successful in maintaining their loyal base of volunteers. This has been due in part to the multiple opportunities for hands-on work that they offer, covering station support, engine and rolling stock repair and maintenance, operational support roles (e.g. signalling), security work, and the maintenance of the lines. These 'experiential voluntary opportunities' have, during the difficult and demanding times of the lockdowns, helped railways to retain their volunteers' interest for when restrictions are lifted.

During lockdown, heritage railways kept their volunteers informed, engaged and feeling appreciated, and this has been enabled by the immediate upscaling of their IT and communications infrastructures. The Isle of Wight Steam Railway, for example, produces regular video messages which are sent to all volunteers²⁹. Other railways use video calls, newsletters and blogs to keep their volunteers informed of events and involved in the running of the sites even while they were not allowed on site. Similarly, the Mid Norfolk Railway notes the importance of this continued

²⁶ Ibid

²⁷ HRA News Magazine, April (2020):

<https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5eaabf63525cf600be6f3c14/1588248430507/HRA+News+160+April+2020.pdf>

²⁸ Gavin Johns, Swanage Railway (2021): Interview 15.02.2021

²⁹ HRA News Magazine, April (2020):

<https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5eaabf63525cf600be6f3c14/1588248430507/HRA+News+160+April+2020.pdf>

engagement, stating that “communication with volunteers together with the wider membership and those with an interest in the railway has been essential. During the last year the use of social media as a means of communication has been developed significantly. This has therefore meant that in a small way many members and volunteers have at least had a virtual experience and been able to see what has been going on without visiting”³⁰. Such approaches have proved successful in keeping volunteers engaged and informed, again increasing the chances that they will return once lockdown eased.

Some heritage railways have drawn upon the skills and experience of their volunteers which sit outside the remits of their volunteering roles. The Severn Valley Railway reported that many of their volunteers “have their own qualifications, experience and ideas that aren’t normally needed in running a heritage railway – but which can be invaluable at a time like this”³¹. Drawing upon these transferable skills and being open to their volunteers’ ideas, has enabled several railways to devise new and innovative ways of working and addressing the dynamic issues created by the pandemic.

Another helpful tactic adopted by the Swanage Railway towards keeping volunteers engaged safely has been to demonstrate the measures put in place to ensure the volunteers’ safety. This served to encourage more hesitant volunteers to return. Gavin Johns, of the Swanage Railway, mentions how “there were some volunteers who were waiting to see first-hand for themselves what arrangements we’d put in place to protect them and the public... once they’d seen them they were quite happy to return”³². Such demonstrations of new operational guidelines could be given to volunteers first-hand via tours of the site (once they were open), or online using videos and pictures of the implemented measures.

Key strategies – engaging with and drawing upon volunteers

- ✓ Where possible provide ‘experiential voluntary opportunities’ to ensure volunteer engagement is secured and loyalty maintained during periods of closure,
- ✓ As with supporters, ensure volunteers are regularly engaged with via a variety of media and are made to feel valued,
- ✓ Draw upon the skills and experience of volunteers which may sit outside the remit of their usual roles – they can be help overcome various challenges,
- ✓ When able to re-open, demonstrate the measures that have been put in place to encourage volunteers back,

3.7 Outdoor opportunities

Some (but by no means all) heritage railways have benefited from the capacity of the large areas that their sites cover to accommodate social distancing, encouraging visitors to return safely during relaxations of lockdown. For example, Emma Jhita stated that “the main reason we have been able to remain a viable business is due to

³⁰ David Singlehurst, Mid Norfolk Railway (2021): Email 09.02.2021

³¹ HRA News Magazine, April (2020):

<https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5eaabf63525cf600be6f3c14/1588248430507/HRA+News+160+April+2020.pdf>

³² Gavin Johns, Swanage Railway (2021): Interview 15.02.2021

the outdoor nature of our site. We've 21 acres of outdoor space set around historic railway buildings, infrastructure and rolling stock – meaning we were a fairly low risk choice for visitors in the summer"³³. The Didcot Railway Centre's site has accommodated a low-density rearrangement of their assets, and it has thus played a vital role in keeping their railway operational, recouping a portion of the lost earnings and improving their financial situation.

Similarly, outdoor volunteering activities, or usually indoor activities moved out of doors, may pose a lower risk than indoor roles. Although this may not be an option available to all heritage organisations, outdoor spaces may create a safer working environment and enable some volunteering operations to continue. With heritage railways, this has also improved volunteers' inclination to return to their roles, given the added safety of working outside.

Key strategies - outdoor opportunities

- ✓ Where possible, make use of the available outdoor spaces (which may be safer) in order to encourage visitors back.
- ✓ If possible, make use of outdoor spaces for voluntary work, which may be safer than some indoor options.

3.8 Collaboration and coordination across the sector

Heritage railways offer a successful example of how cross-organisational support, from sector bodies such as the HRA and via railway-to-railway communication and collaboration, can secure resilient responses to challenges. From the onset of the pandemic, the HRA has sought act as 'one voice' for heritage railways. They have worked to provide leadership in navigating Covid-19's effects by making the railways' voice heard within Government and the media, and by lobbying Government and institutions for additional funding, tax reliefs and benefits. It has provided advice for railways seeking to apply for [public funds](#) or improve their fundraising activities. The HRA has also produced guidance documents to ensure that the heritage railways are fit to open as soon as possible once lockdown restrictions were lifted, such as the [12-point Railway Revival Checklist](#). The focused approach adopted by the railways has enabled a pooling of experience in order to ensure that successful strategies (for meeting pandemic's challenges) are shared, and less successful approaches discarded or altered.

The HRA has also undertaken its own research into the impact of Covid-19 by encouraging heritage railways to provide feedback via surveys and questionnaires. This work has increased the sector's understanding of the impacts of the pandemic, helped tailor the specific support and guidance needed by the sector, and ensured that the sector's lobbying for further assistance is supported by evidence. The latter point has increased the weight that the HRA can bring the bear upon decision makers, thus securing greater support for the sector.

³³ HRA News Magazine, April (2020):

<https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5eaabf63525cf600be6f3c14/1588248430507/HRA+News+160+April+2020.pdf>

Railway-to-railway communication has shared valuable experiences between organisations and generated a wealth of information and ideas on how to address the challenges of the pandemic. For example, the General Manager of the Severn Valley Railway lauded the benefits of such an approach: “I’ve been in daily contact with other General Managers, by phone, email and LinkedIn. The support and sharing of ideas and plans has been a huge help”³⁴. This approach has been mirrored at the Keighley & Worth Valley Railway where challenges encountered were in part addressed by discussions with other heritage railways, “we’ve got ideas from them, and they’ve got ideas from us”³⁵. Even though there may be competition between the railways in terms of attracting support, this collaborative and supportive approach has enabled challenges to be addressed based on shared practical experience, has alerted railways to challenges that they might not have considered, or highlighted solutions that might not have been entertained.

Key strategies – collaboration and coordination across the sector

- ✓ Ensure that sector bodies lead from the front – act as ‘one voice’ on behalf of the sector, provide guidance to member organisations, and pool experience and knowledge to enable it to be shared,
- ✓ Undertake research to provide further evidence and weight when lobbying for support on behalf of the sector,
- ✓ Support organisation-to-organisation communication and the sharing of experiences and ideas.

3.9 The rapid establishment of effective crisis management teams

Vital to the navigation of the pandemic has been the rapid establishment of crisis management teams in order to address current and anticipated challenges to the railways. One example among many was the approach taken immediately after the announcement of first lockdown in 2020 by the Severn Valley Railway. This organisation took the decision to establish a military-style ‘Gold, Silver and Bronze’ crisis management system³⁶. The Gold Team included Directors and key senior managers and would meet for 15 minutes each day to discuss ‘what happened yesterday?’ and ‘what do we need to do today?’. The Silver Team comprised of senior staff and more vocal or influential volunteers would also meet, with the outcomes of those meetings being communicated to the Bronze Team made up the remaining members of the organisation³⁷. Many organisations have adopted a similar approach with different labelling. The rapidity with which these structures were formed and their effectiveness, in terms of being able to act nimbly, has played a key role in their success. From the very start of the lockdown these teams enabled railways to avoid the confusion and delays in decision making that might result from the changed situation. They have ensured that decisions are made quickly, communicated efficiently, and implemented correctly.

³⁴ HRA News Magazine, April (2020):

<https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5eaabf63525cf600be6f3c14/1588248430507/HRA+News+160+April+2020.pdf>

³⁵ David Pearson, Keighley & Worth Valley Railway (2021) Interview 10.02.2021

³⁶ HRA News Magazine, April (2020):

<https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5eaabf63525cf600be6f3c14/1588248430507/HRA+News+160+April+2020.pdf>

³⁷ Ibid

Key strategies – the rapid establishment of effective crisis management teams

- ✓ When a crisis hits or is expected, move quickly to create crisis management teams to ensure actions and decisions can be undertaken efficiently and flexibly.

3.10 Opening flexibility and creating revenue streams

Several heritage railways have sought to address the effects of lockdown by postponing events, rather than outright cancelling them or completely closing their site for the year. This enabled some events to be restored and timetabled operations to resume comparatively quickly once re-openings were permitted. It is important to note that many events cannot be easily rescheduled at short notice due to the amount of organisation and planning they require. However, postponement rather than cancellation places the organisation in a stronger position from which such activities can be resumed when opportunities allow. The benefits of adopting such a flexible approach has met the public's desire to resume visiting, as during 2020 it was found that the many railways that did re-open were "attracting more visitors than anticipated"³⁸. This has generated revenue that would otherwise have been lost.

Furthermore, the act of closing due to lockdown risked creating a negative view of the railways as an option to visit in the future, as one interviewee stated: "when you're closed for the pandemic people take quite a negative position on that, so it's quite important for us to open as soon as possible"³⁹. Thus, by planning flexibly for the possibility of general reopening and the resumption of events, sites are seen not to have closed indefinitely, which can help mitigate negative perceptions that might otherwise have developed.

The Didcot Railway Centre employed a creative approach towards securing revenue whilst their site was closed. The organisation launched the 'Special Return Ticket', an initiative in which "you bought a ticket before we were able to re-open in good faith that you would be able to visit in the coming weeks"⁴⁰. Interestingly, the same ticket enabled would-be visitors to visit the site while trains were not running and could be used again to enter once train operations resumed. Such a creative strategy generated vital revenue even though the site was closed. It also enabled the site to open earlier than it might otherwise have, given the time required to get the full complement of visitor attractions functioning (i.e. the trains). Furthermore, it reassured would-be visitors that the railway would be re-opening, ensuring continued interest amongst potential visitors.

Key strategies – opening flexibility and creating revenue streams

- ✓ Aim to limit closures to the period of the lockdown or challenge, rather than for blanket periods of time (e.g. outright for the whole year),
- ✓ Where possible, postpone rather than cancel events.
- ✓ Adopt flexible and creative approaches to generate revenue during closures.

³⁸ HRA News Magazine, April (2020):

<https://static1.squarespace.com/static/59f1c5ec51a58457c01eaed0/t/5eaabf63525cf600be6f3c14/1588248430507/HRA+News+160+April+2020.pdf>

³⁹ Gavin Johns, Swanage Railway (2021): Interview 15.02.2021

⁴⁰ Emma Jhita, Didcot Railway Centre (2021): Interview 18.02.2021

4. Strategies for the heritage sector

This report has highlighted the common strategies employed by some of England's heritage railways to mitigate the impacts of the Covid-19 pandemic. Although these strategies are derived from the experiences of railways, they may have broader applicability in the wider heritage sector, and to challenges that are unrelated to the pandemic. These strategies and approaches are summarised below:

<p>Assessing public funds</p>	<ul style="list-style-type: none"> ✓ Sector bodies should signpost and provide guidance on how to seek and apply for public funds, ✓ Ensure an open and supportive spirit is fostered between sector organisations when apply for recovery funds in order to share experiences and advice.
<p>Fundraising and philanthropy</p>	<ul style="list-style-type: none"> ✓ Proactively organise and expand fundraising programmes at the earliest opportunity, ✓ Continue to fundraise for non-pandemic projects, ✓ Ensure sector bodies signpost and provide guidance on soliciting donations.
<p>Simplify online donations</p>	<ul style="list-style-type: none"> ✓ Overhaul online donations processes to make them visible to would-be supporters and simple to complete.
<p>Invest in IT infrastructure</p>	<ul style="list-style-type: none"> ✓ Update IT infrastructure to enable vital communications with staff, volunteers, and supporters, and to ensure that vital works (onsite and remotely), support and fundraising actives can continue.
<p>Engaging with supporters</p>	<ul style="list-style-type: none"> ✓ Ensure supporters are regularly engaged with via a variety of media and are made to feel valued, ✓ Make sure supporters are informed about the issues at hand and how their support will help reach realistic goals, ✓ Adopt a positive (where appropriate) voice to avoid creating the impression amongst supporters that they are being asked to support a lost cause, or one that will generate apathy.
<p>Engaging with and drawing upon volunteers</p>	<ul style="list-style-type: none"> ✓ Where possible provide 'experiential voluntary opportunities' to ensure volunteer engagement is secured and loyalty maintained during periods of closure, ✓ As with supporters, ensure volunteers are regularly engaged with via a variety of media and are made to feel valued, ✓ Draw upon the skills and experience of volunteers which sits outside the remit of their roles - they can be useful in addressing various challenges, ✓ When able to re-open, demonstrate the measures that have been put in place to encourage volunteers back.

<p>Outdoor opportunities</p>	<ul style="list-style-type: none"> ✓ Where possible, make use of the available outdoor spaces (which may be safer) in order to encourage visitors back, ✓ If possible, make use of outdoor spaces for voluntary work, which may be safer than some indoors options.
<p>Collaboration and coordination across the sector</p>	<ul style="list-style-type: none"> ✓ Ensure that sector bodies lead from the front – act as ‘one voice’ on behalf of the sector, provide guidance to member organisations, and pool experience and knowledge to enable it to be shared, ✓ Undertake research to provide further evidence and weight when lobbying for support on behalf of the sector, ✓ Support organisation-to-organisation communication and the sharing of experiences and ideas.
<p>The rapid establishment of effective crisis management teams</p>	<ul style="list-style-type: none"> ✓ When a crisis hits or is expected, move quickly to create crisis management teams to ensure actions and decisions can be undertaken efficiently and flexibly.
<p>Opening flexibility and creative revenue streams</p>	<ul style="list-style-type: none"> ✓ Aim to limit closures to the period of the lockdown or challenge, rather than for blanket periods of time (e.g. outright for the whole year), ✓ Where possible, postpone rather than cancel events. ✓ Adopt flexible and creative approaches towards obtaining revenue whilst the site is closed.

Prepared by Marcus Ward for the Heritage Sector Intelligence Desk, Historic England, March 2021.