



# *Early Lessons from Kent*

**HIGH SPEED RAIL IN BRITAIN**

**12/2009**

  
**GREENGAUGE21**

## Contents

Executive Summary	ii
1. Introduction	1
2. Background: rail travel in Kent	3
3. High-Speed Southeastern services	6
4. Preview service users	9
5. Economic regeneration	17
6. Longer term possibilities	21

Funded by:

*High Speed 1*

and with the kind assistance of:

*Kent County Council  
Southeastern*

Research by:

*The Leading Edge*

## Executive Summary

The full launch of the UK's first domestic high-speed rail service takes place on 13<sup>th</sup> December 2009. Southeastern's new high-speed trains run at 140 mph (225 km/h) on High Speed 1 (HS1) between London St Pancras, Stratford, Ebbsfleet and Ashford. This is being billed as Europe's fastest commuter service. The new services will extend beyond HS1 to serve a string of destinations across Kent including Dover, Folkestone, Ramsgate, Faversham and the Medway towns.

The High-Speed Southeastern (HS-SE) services deliver transformational journey times – London to Ebbsfleet in 17 minutes and London to Ashford in 37 minutes, saving ¾ hour – and provide much better connectivity from Kent to the rest of the country's rail network. The experience gained with these new services is important for Britain as a whole because of the potential insights it offers for the future development of a national high speed rail (HSR) network.

Greengauge 21 has researched local reactions to the Preview HS-SE services, which have been running since June 2009. Our research shows how much people already appreciate the difference in journey times and service quality. As one respondent told us, Preview users are finding they are “being given back two hours of their day”.

Reaction to the fast new trains is very positive: **well over 90% of passengers are satisfied or very satisfied with the service** according to research carried out on behalf of Southeastern, the operator of the new trains – and that's with a premium fare being payable.

It is notable that this will be the first major new rail service launched in the era of social media and so it has been critically important that early adopters have a good experience on their first journeys, since the word will spread fast. Our research revealed the positive views visible on blogs and newspaper websites.

The Preview services have been used for all sorts of journeys: 59% of users are commuting, 22% travelling on business and the remainder are on leisure trips. These are not just people trying out the new trains, but real journeys with people getting real benefits.

**Already, it is evident that high-speed rail reduces road traffic.** Overall, 8% of HS-SE users have switched from road use. At Ebbsfleet station, 26% of users are new to rail (11% having switched from car or coach, the remainder making new journeys). This switch from road to rail is higher than the cautious forecasts in Greengauge 21's business case for a national HSR network. Earlier research amongst commuters in Kent suggested that this 'modal switch' would be perhaps twice as large an effect in the absence of a fare premium.

Before the HS-SE services were introduced, research also showed that St Pancras was not favoured as a London terminus compared with the traditional terminus stations for Kent services. However, the evidence from a survey carried out this year amongst over 800 HS-SE Preview users is that St Pancras is now being used to access a very wide set of destinations across the West End and the City, in preference to the traditional termini, even for places Kent commuters had identified as being less well-served by travelling via St Pancras.

The positive reception of the Preview services is filtering through into the Kent business community and into the housing market. Our new and very recent

research evidence indicates that there is an increased level of interest in housing and in commercial development in Ashford, for example. Development market experts sense there may be **an important one-hour threshold for journey times to London: at locations within this threshold they expect to see new interest emerging in local commercial development.** This means the local business regeneration effects of HS-SE can extend as far east as Canterbury and Folkestone.

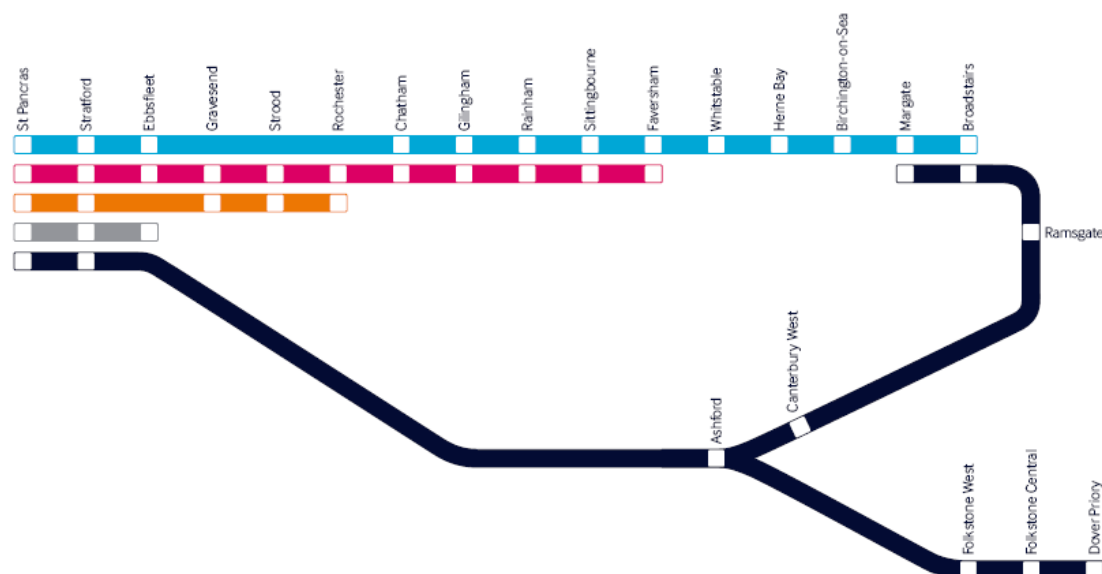
These encouraging findings should not be met with complacency, however. International experience suggests that there is a limited time window for towns served by HSR to secure wider regeneration benefits before the new rail services become 'taken for granted'. The new HS-SE services will certainly put Kent in a strong position as Britain emerges from recession but local communities, business and residents need to be ready to capitalise on the immediate transport improvements to ensure they secure long-term benefits and sustainable economic regeneration.

## 1. Introduction

### High Speed Southeastern services

In December 2009, Southeastern launches the first high-speed domestic train service between London and Kent. Operating on High Speed 1, the High Speed Southeastern (HS-SE) services will travel at up to 140 mph (225 km/h), dramatically reducing journey times and serving new stations at Ashford, Ebbsfleet and St Pancras.

**Figure 1 – Destinations to be served by HS-SE services**



In anticipation of the full launch, Greengauge 21 has reviewed the available evidence on the likely impacts of the new high-speed Kent services on residents, businesses and the local economy. This draws on emerging results from the Preview trial services operated by Southeastern since June this year.

While the new HS-SE services may be considered by some not to be genuine 'high-speed' – operating at 'only' 225 km/h rather than the 300 km/h and above that is normally considered to be high-speed – they are dramatically reducing journey times and offering much improved connectivity over new purpose-built infrastructure. This is why understanding the impacts of these services is so useful and why the lessons should be identified for the national high-speed rail (HSR) network that Greengauge 21 and its Public Interest Group wish to see develop.

### Prior expectations

A year ago, Kent County Council reviewed<sup>1</sup> the plans for rail services in Kent, in anticipation of the launch of the new High Speed services by Southeastern in December 2009. The review sought to understand the issues associated with HS-SE services, including their likely effect on wider economic regeneration aims in the county and is helpful in setting a benchmark of expectations.

The perspective on the forthcoming HS-SE services was at the time summarised like this:

*"Overall, there was a general satisfaction in the expected service provision of High Speed with particular praise for the extension of High Speed services to Dover and Thanet."*

<sup>1</sup> Select Committee on Future Rail Services in Kent, Kent County Council, October 2008.



*However, there were still a number of concerns particularly with regards to the lack of interchange at Stratford and the location of the terminus station at St Pancras”*

The question of the suitability of St Pancras as a terminal is something on which the experience with the Preview services has been able to shed some light, but Stratford station only became usable at the end of November 2009, so evidence on the transfer and accessibility issues here will have to wait.

### **Acknowledgements**

This report draws on data, analysis and reports made available to Greengauge 21 by Southeastern (which operates the rail services in Kent on a franchise) and Kent County Council, to whom we express our thanks. We are also extremely grateful to High Speed 1 who provided financial sponsorship for this work.

To update the earlier Kent County Council research, Greengauge 21 commissioned a new survey of Kent businesses and opinion-formers. This survey, carried out by The Leading Edge in November 2009, involved a number of in-depth interviews across different market sectors in Ashford, Folkestone and Dover. Most respondents had direct experience of the HS-SE services; the remainder were fully aware of it. This research is the source of the quotations in the report.

This report remains the work of Greengauge 21 and any opinions expressed in this report are those of Greengauge 21 alone.

## 2. Background: rail travel in Kent

The pattern of existing commuting in Kent is striking: its workforce has an average commute of 16.9 km<sup>2</sup>, which is the lengthiest of any of the south eastern counties. Table 1 shows the overall pattern by mode of commuting from Kent to Central London. We can see that, overall, 6% of Kent residents commute to London, with the proportion doing so being higher from places closer to London, such as Sevenoaks and Dartford. Rail is the dominant mode, but there is also a significant coach flow from Gravesham district.

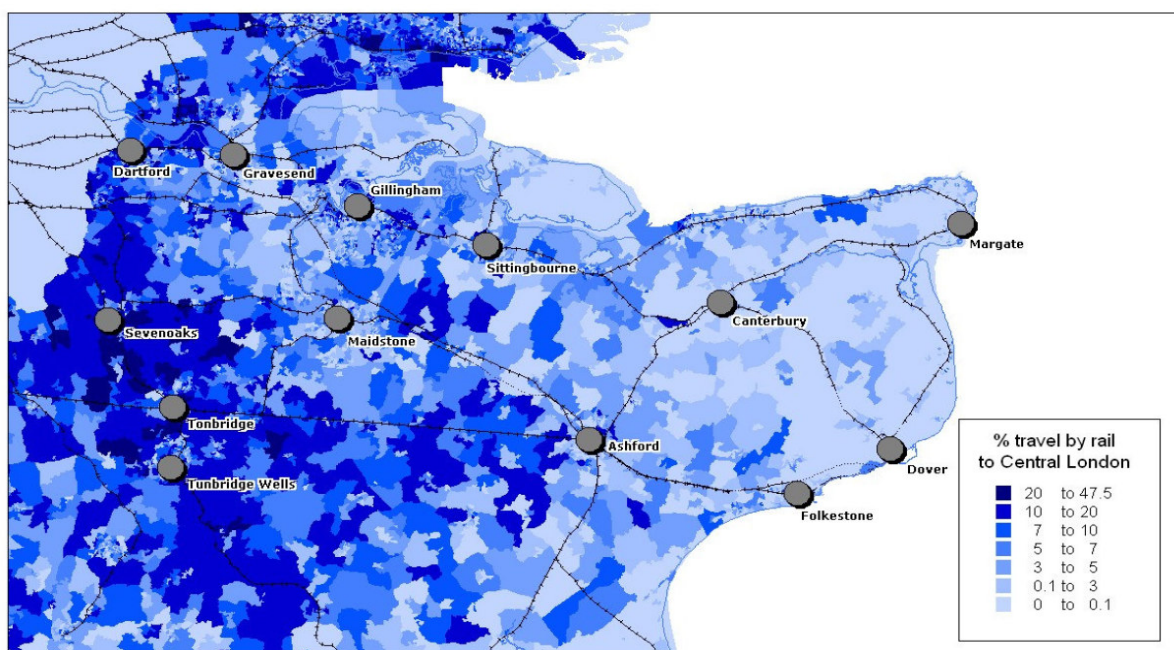
**Table 1 – Proportion of Kent workforce commuting to central London by mode**

District	Rail <sup>2</sup>	Bus/Coach	Car <sup>3</sup>	Total
Ashford	3%	0%	1%	4%
Canterbury	2%	0%	0%	2%
Dartford	9%	0%	2%	12%
Dover	0%	0%	0%	1%
Gravesham	5%	3%	2%	9%
Maidstone	4%	0%	1%	5%
Medway	5%	1%	1%	7%
Sevenoaks	12%	0%	2%	14%
Shepway	1%	0%	0%	2%
Swale	3%	1%	1%	5%
Thanet	1%	0%	0%	1%
Tonbridge and Malling	7%	0%	1%	9%
Tunbridge Wells	9%	0%	1%	10%
<b>Total</b>	<b>5%</b>	<b>1%</b>	<b>1%</b>	<b>6%</b>

Source: MVA Consultancy, *Transport for development: high speed rail in Kent*, report for Kent County Council in association with Southeastern, April 2008.

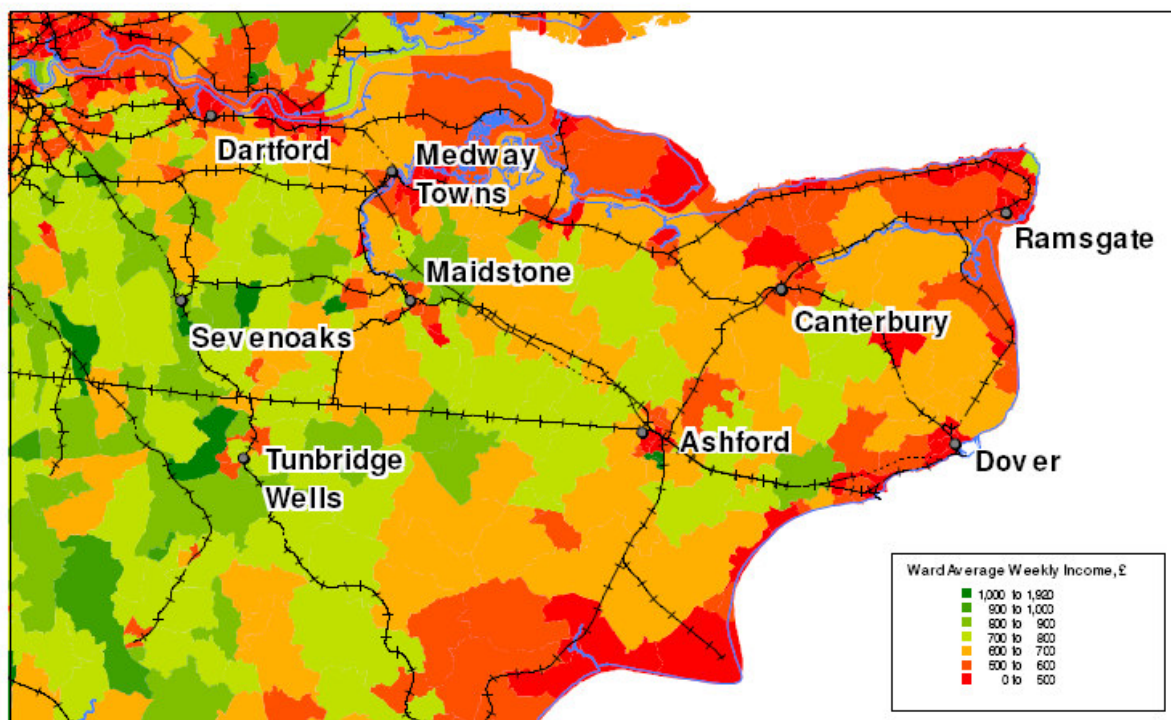
The pattern of rail use for commuting to central London is illustrated in Figure 2 below. This highlights again the higher levels of rail commuting in the west of Kent, nearer to London, particularly from Sevenoaks and Tonbridge. East of Ashford there are relatively few rail commuters into London.

<sup>2</sup> MVA Consultancy, *Transport for development: high speed rail in Kent*, report for Kent County Council in association with Southeastern, April 2008.

**Figure 2 – Workers commuting by rail to central London**

Source: MVA Consultancy, *ibid.*

It is also important to understand commuting patterns in the light of the demographics of Kent. As shown below in Figure 3, there is a wide variation in income levels, with lower incomes particularly prevalent on the remoter coastal areas, the Dartford area and to a degree in the Medway towns. This helps to explain the niche that coach services have established in certain price-sensitive markets in the area.

**Figure 3 – Average household weekly income  
(2001 census grown to 2007 levels using GDP data)**

Source: MVA Consultancy, *ibid.*



Overall, the county has a low ratio of jobs to employed workforce compared with other South Eastern counties, which, combined with the long average commuting distance, indicates that there is net out-commuting and Kent's population needs to travel further to find employment. The economic performance of Kent is linked to the economy of London and thus ready access to London jobs is important.

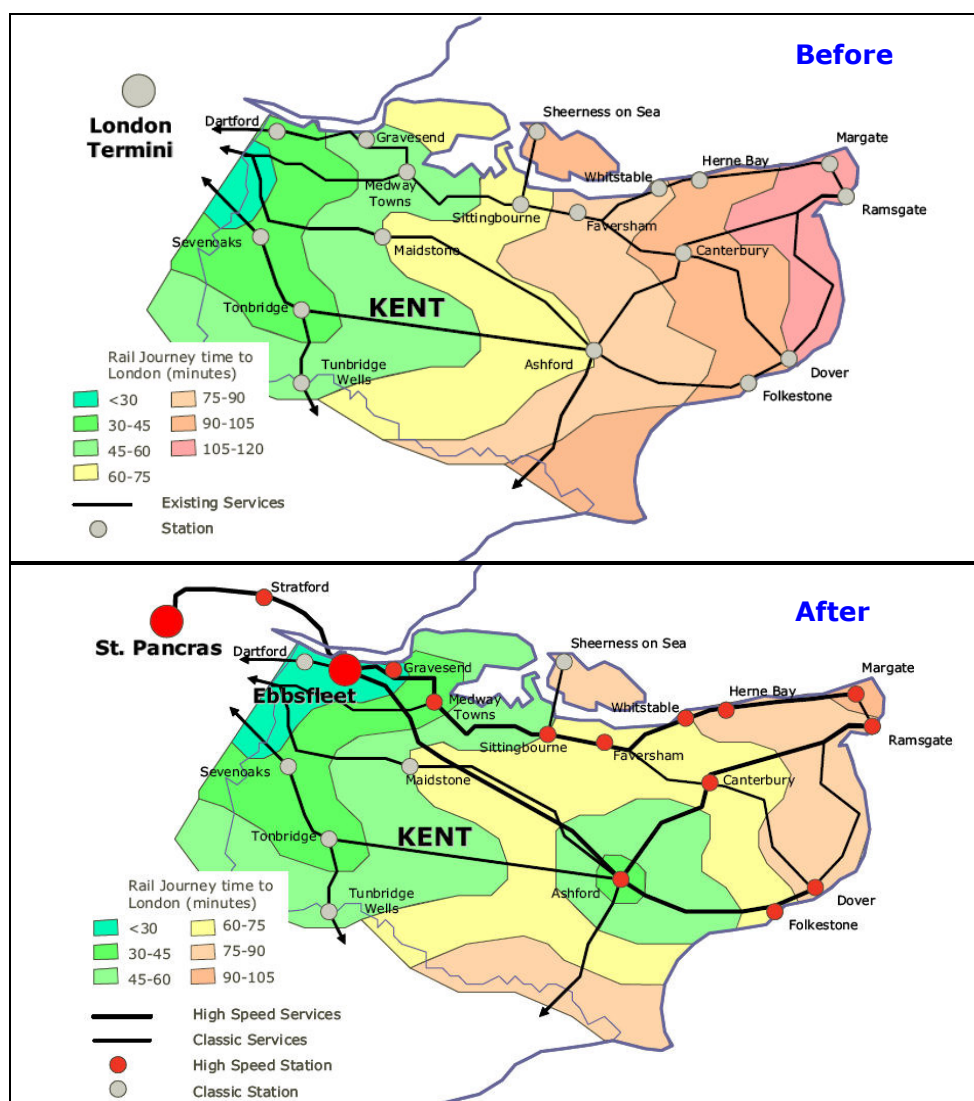
### 3. High Speed Southeastern Services

When they are launched fully on December 13 2009, the HS-SE services have the potential to be transformational. They will offer:

- Very fast journey times - St Pancras to Ebbsfleet in 17 minutes, St Pancras to Ashford in 37 minutes
- A large-scale park and ride facility, with 5,000 car parking spaces at Ebbsfleet
- A new train fleet by Hitachi, operating at 225 km/h (the country's fastest commuter service); dual voltage trains equipped with in-cab signalling, pressure sealed and GPS-enabled
- Service frequencies of four trains/hour (at Ebbsfleet) during the peak and off-peak periods.

The effect on journey times is dramatic, as can be seen in Figure 4. From Ashford to London, the journey time is reduced by 46 minutes; from Canterbury and Folkestone the journey time to London falls by a similar amount to just under an hour.

**Figure 4 – Journey time isochrones before and after introduction of HS-SE services**



Source: Kent County Council, *ibid.*

*"Time is what it's all about these days and this service certainly lives up to helping you save it." IT consultant, Ashford.*

In addition, the connectivity provided to Kent from the East of England, to the Midlands, the north of England and to Scotland is transformed through the interchange possibilities at Stratford, Kings Cross and St Pancras stations.

### **The Preview Service: an outline**

While Southeastern was in the early stages of planning the high speed services for Kent, on the other side of London a critical piece of infrastructure was already opening: Heathrow's Terminal 5. The widely-reported difficulties that ensued convinced Southeastern of the need to ensure that would be no repeat of the T5 opening debacle when it came to the launch of Kent's new services. That meant that there would need to be a progressive introduction of the new trains into service, with the public invited to use them, to ensure that all of the systems and interfaces work well come the day of the big launch. Hence the idea of the *Preview* service. It has run with a gradually intensified timetable for six months and allows an early insight into the reaction of customers and the community that HSR serves.

#### **Four phases of the Preview service**

- 29 June – HS1 only, Monday to Friday, Ebbsfleet shuttles, Ashford Peak
- 7 September –Peak additions to Ramsgate, Canterbury, Folkestone and Dover
- Mid October –Weekend Ebbsfleet and Ashford services
- 21 November –limited North Kent Line service

The benefits of the time savings offered by HS-SE services are already apparent during the Preview phases. Greengauge 21's survey suggested that there was some scepticism before the 'soft launch' over whether the service would really live up to its hype and be as fast and reliable as claimed. Since services have started, however, the majority of those who have used it have formed a very positive impression and highlight the benefit of the time savings.

*"All those whom I've spoken to who have used it are very positive about it. Some people are even saying it's been transformational, having a major impact on their daily lives in terms of giving them back two hours of their day ... they sum it up as 'I've just done time travel'."*  
Managing Director, Ashford.

Not all aspects of the HS-SE services can be assessed during the Preview service. The advantages of a high frequency service integrated into a revised 'classic' line service will not materialise until December 2009, with the launch of the full Kent HS-SE timetable. On this date, there will be 150 new HS-SE services per day and a further extra 50 'classic' line services (mainly increasing frequencies on the 'metro'

services). It was also not possible to research use of the key station at Stratford, since the activities on the Olympic site precluded creating suitable access until December.

#### 4. Preview Service Users

Preview service users in some cases may be one-off triallists, but many have become *early adopters*. One early adopter is now a regular customer who previously drove to North Greenwich (Jubilee Line) but now prefers a shorter car journey and use of Ebbsfleet, which is only 17 minutes from St Pancras.

Promotional activity by Southeastern to promote the Preview service has included free weekly season ticket offers, advertised through Heart FM radio. With 200 takers, over half converted to paid-for season tickets the following week.

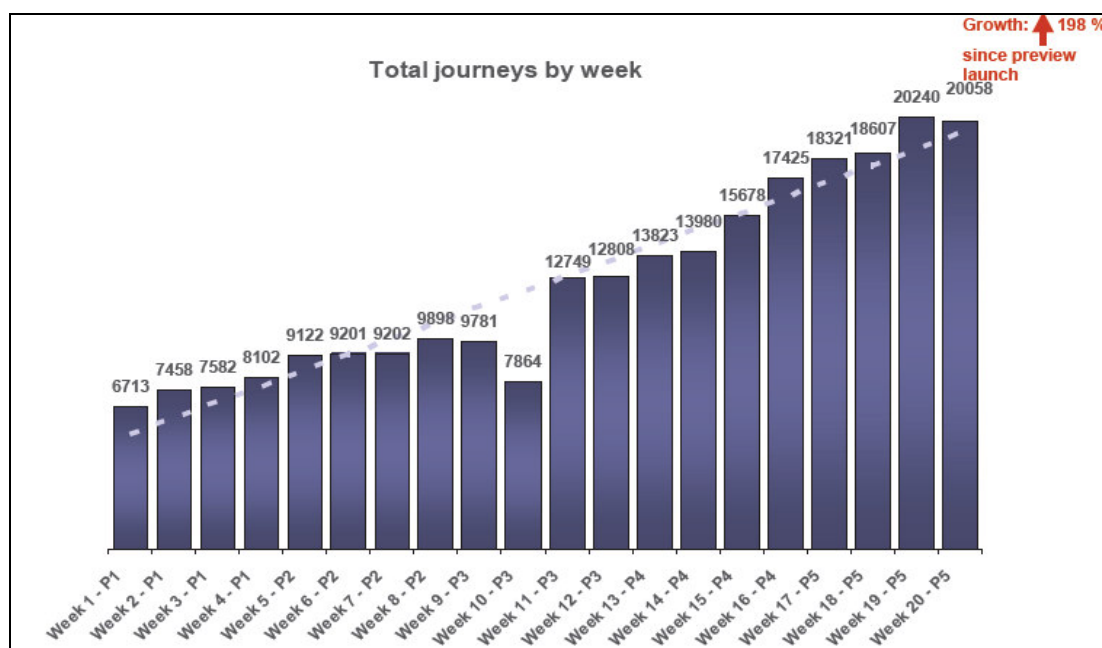
Evidence from the local press and internet blogs show that awareness is now building well, including among smaller businesses and community organisations as well as the larger companies and estate agents who tend to pick up on new developments more quickly. Indeed, this will be the first significant new rail service to be launched in the era of *social media* – web-based and other electronic communications which are becoming increasingly used in preference even to emails, leave alone the long established and formal media channels. Given the immediacy of these new communication forms, the effects on opinion setting could be themselves profound.

There is clearly further work to be done on promoting understanding beyond the areas of Kent directly served and in clarifying for people the distinction between the regular, permanent, HS-SE services and the temporary Javelin services that will be operated for the 2012 Olympics. Respondents in Kent expect these issues to be overcome when the service is launched fully in December 2009 with accompanying publicity.

*“It takes time for these things to take grip but once it does it will be massively popular.”* Businessman, Folkestone.

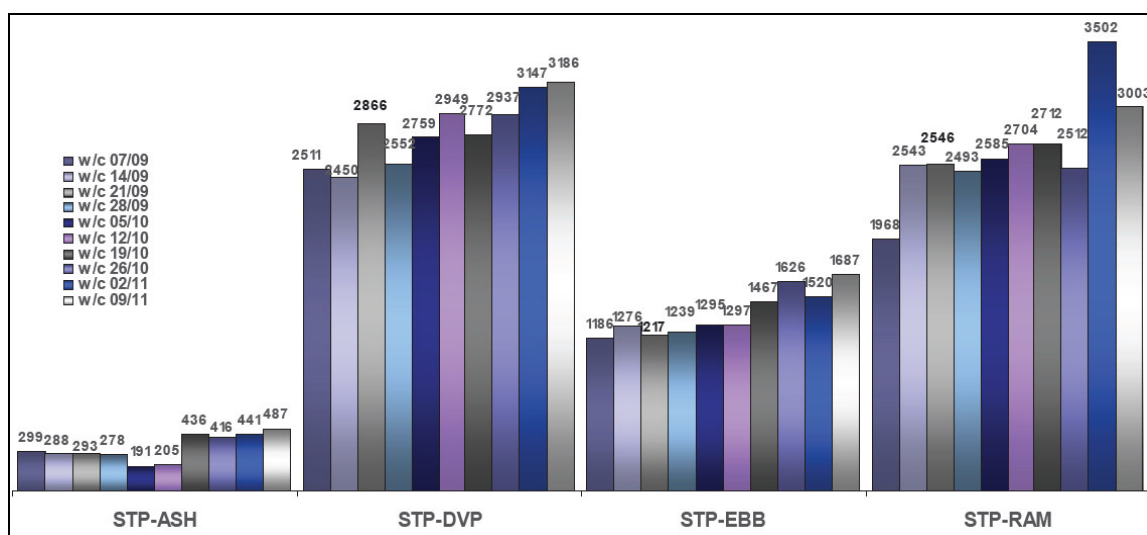
Over the period of the Preview services, travel volumes have grown – by about 5% per week. The breakdown of journey purpose in the sample of over 800 Preview service users is 59% commuting, 22% business and 18% leisure (data courtesy of Southeastern). This profile shows that the Preview services have been used for real journeys, and for the variety of purposes for which the full service will no doubt be used shortly.



**Figure 5 – Total HS-SE journeys by week, 2009**

Source: Southeastern

Evidence on the pattern of demand growth is available from the second and third phases of the Preview service period. Figure 6 indicates greatest use of the Dover (DVP) and the Ramsgate (RAM) services, with the balance coming from the Ebbsfleet-only (EBB) and Ashford-only (ASH) trains.

**Figure 6 – Weekly journeys by line of route Mon-Fri, Phases II and III**

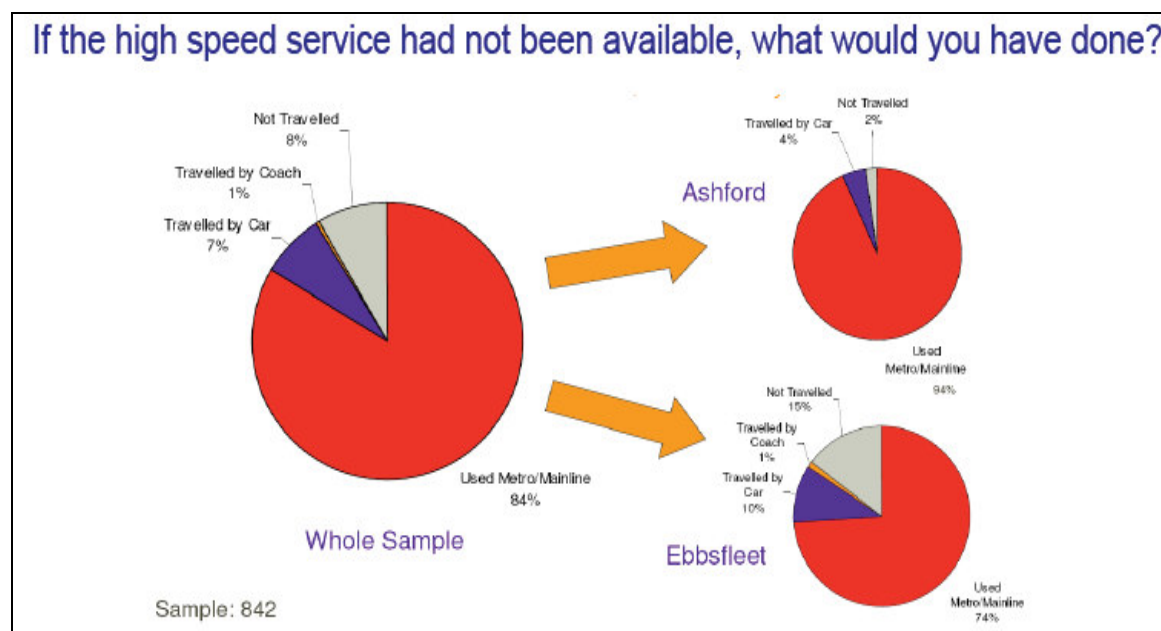
Source: Southeastern

There is a market of established commuters for the HS-SE services, especially in the Gravesham area in North West Kent. Here, in a characteristic that is not shared across the rest of Kent, there are as many commuters to London using road-based transport as rail services, with the M2 corridor offering an alternative for both car users and for the well-established coach businesses.

One of the most valuable findings from the surveys carried out by Southeastern into the use of the Preview services is that of mode choice and trip generation. The

responses to the question put to Preview service users: “if the high-speed service had not been available, what would you have done?” is shown in Figure 7.

**Figure 7 – Mode choice and trip generation**



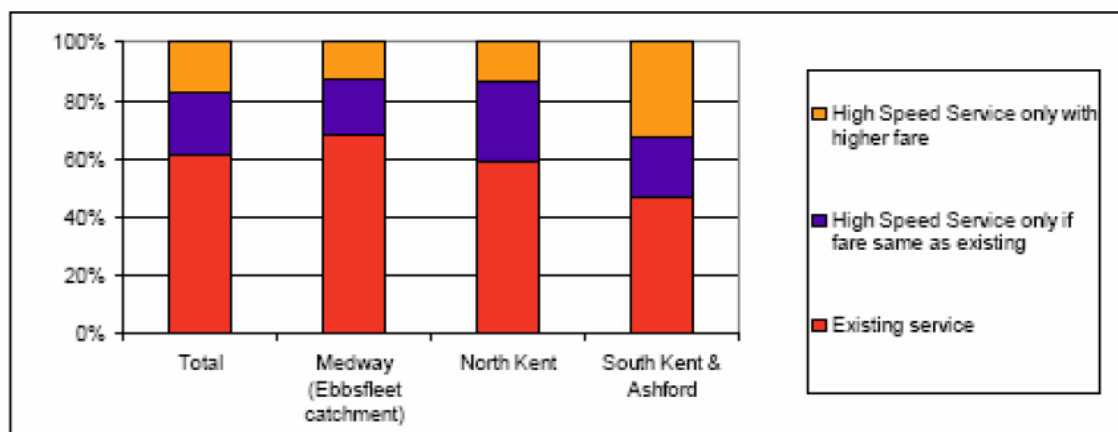
Source: Southeastern

It can be seen that while most HS-SE users would have used a regular (non high-speed) train service in its absence, 8% would have used a road-based mode and 8% would not have travelled at all. The effect is even more dramatic at Ebbsfleet, where 15% would not have travelled, and 10% would have travelled by car. In the Ebbsfleet catchment, where there is perhaps the best-developed commuter coach operation into London in the whole country, it will be interesting to see if the initially modest penetration of the coach market (1% of Preview users) will increase significantly as the full HS-SE service is rolled out.

**There is already a clear implication: high-speed rail services are reducing road traffic. For the train operator, there is also the obvious advantage that there are significant numbers of travellers – 16% - new to rail, which increases revenue, and improves franchise economics.**

These findings are in the context of a premium fare payable on HS-SE services of up to £4.40 for a single journey for passengers travelling via Ashford during the peak (although considerably less for Ebbsfleet passengers, for off-peak journeys or for season tickets). Earlier analysis carried out for Kent County Council suggested a rather larger impact on modal transfer if there was no fares premium on the high-speed services. In Figure 8, we show the forecast proportion of passengers who stated, before the Preview service started, whether they would switch to the HS-SE service or stick with existing services, both with and without an assumption of a fares premium. Overall, nearly 20% stated they would shift to the HS-SE service with a fare premium, but that proportion doubled if no fare premium were charged. This varies by area: over half of passengers from South Kent and Ashford expected to shift to the much faster HS-SE services and these passengers seem to be less sensitive to a fare premium.

**Figure 8 – Proportion of existing Southeastern passengers who would shift to HS-SE services**



Source: MVA Consultancy, *ibid.*

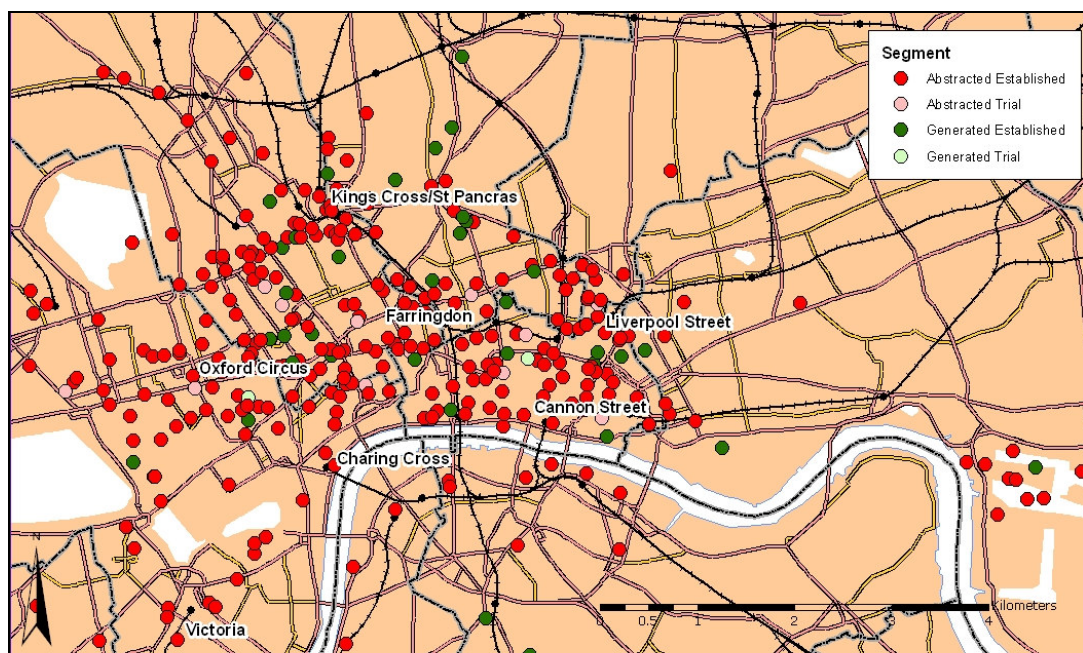
The cost of using the HS-SE services appears was also raised as an issue by respondents to the Greengauge 21 November 2009 survey, with consciousness not only of the fare premium but also of the cost of car parking at Ebbsfleet and, for some, additional costs for travel within London. However, for the majority of respondents, the time-saving benefits far outweigh any price increases.

*“People have accepted that if you get a better service you pay for it. You still have the option of using the standard services but many feel that a reduction from 83 minutes to 37 minutes journey time is worth paying for.” Business leader, Ashford.*

One of the concerns about the Kent high-speed services has been the question of London terminal location. Kent has been connected to terminus stations at Victoria, London Bridge, Charing Cross and Cannon Street for a very long period of time. How would people respond to the offer of a new location on the north side of central London at St Pancras?

Respondents interviewed in Kent in November 2009 recognised the change in travel patterns and mind-set that would be required for some to accept St Pancras as a new terminus for London, but others highlighted the station as particularly well-connected, with ready access to north London and the north of England via St Pancras, Kings Cross and Euston stations. So far, the time savings from using the HS-SE services had been of benefit even for those who needed to ‘back-track’ from St Pancras to get to the City.

In the following chart, ultimate passenger origin/destinations are shown for users of the Preview services. The red/pink dots show those people abstracted from existing services, and it can be seen that these high-speed service users, together with those shown in green (newly generated trips) are travelling to a wide range of locations in central London, covering the City and the West End, and with strong coverage along the Euston Road corridor, as would be expected.

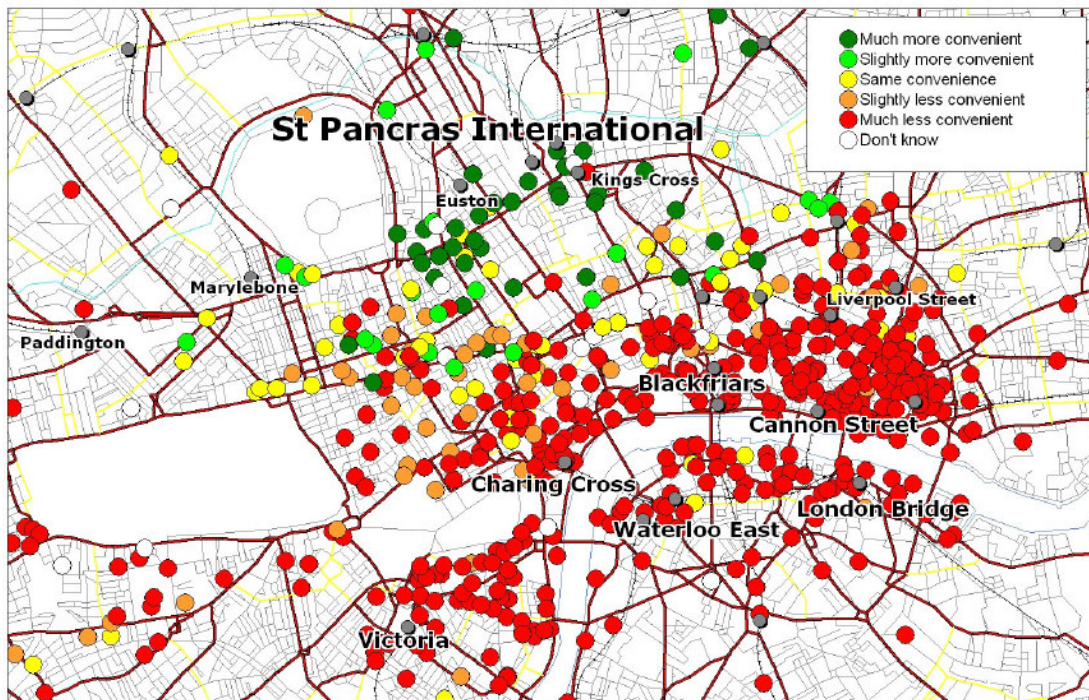
**Figure 9 – St Pancras station catchment**

Source: Southeastern

*“The new facilities in St Pancras are incredible, so it shows that this is exactly where the service should stop. I actually use the station to shop, which is a new experience.” Artist, Dover.*

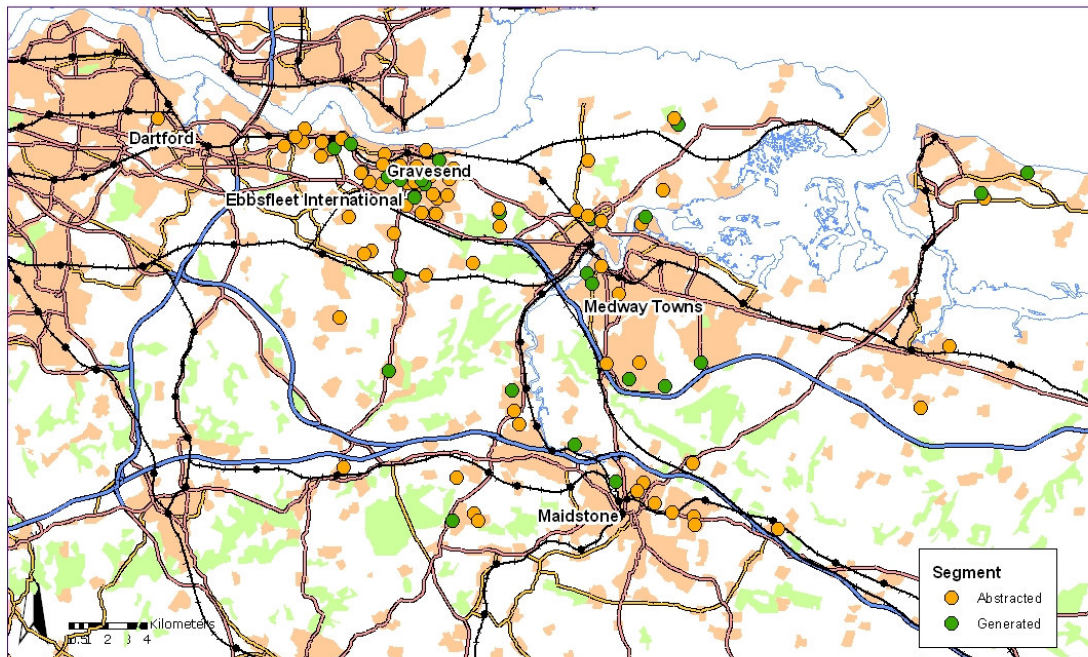
This makes an interesting comparison with perceptions of the convenience of St Pancras as a terminal, measured by research carried out *prior* to the introduction of the Preview services. In Figure 10 it can be seen that areas such as the City and the West End south of Oxford Street were considered by passengers to be less well served by St Pancras than their existing stations. Yet, as Figure 9 shows, the Preview services are carrying large numbers of users to these locations, reflecting perhaps the broader benefits derived from using the high-speed services or the difference between perceptions and the reality of travel within London.



**Figure 10 – Convenience of St Pancras station**

Source: MVA Consultancy, *ibid.*

We can also see the catchment for a major park and ride station on a high-speed line is widely drawn, as Figure 11 illustrates for Preview service passengers using Ebbsfleet station (again distinguishing between abstracted and generated travel). There is clearly a cluster of passengers from the Gravesend area but there are also significant numbers travelling further from the Medway and Maidstone areas.

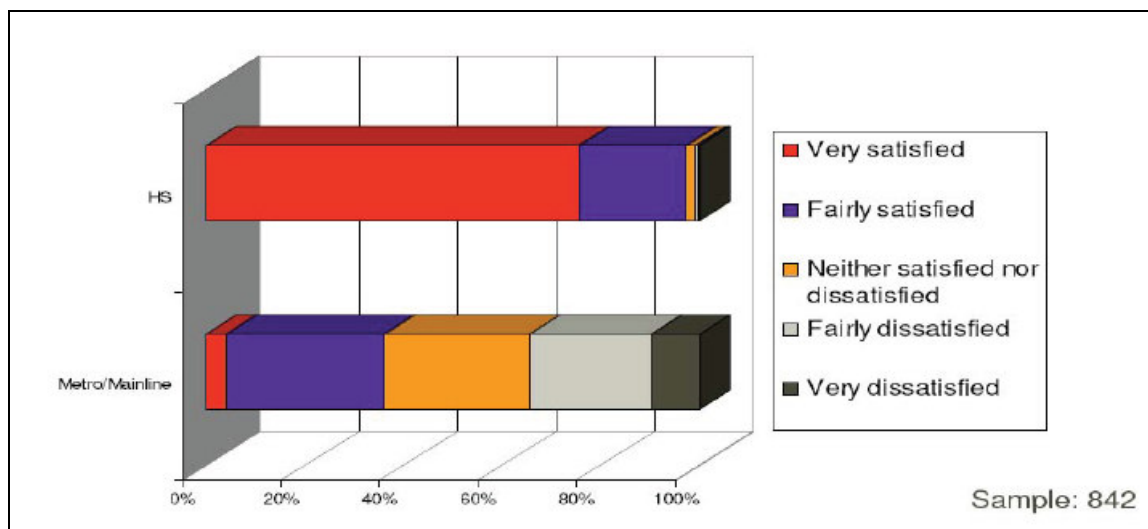
**Figure 11 – Ebbsfleet station catchment**

Source: Southeastern



Southeastern's passenger surveys provide useful feedback on users' experience of travelling on the new services. This is particularly interesting given the fares premium payable for using these services, and the fact that there is no additional customer service on offer on-board (indeed, there is no first class facility). As can be seen in contrast with the alternative non-high speed services, the approval ratings are very high indeed. Well over 90% of passengers are satisfied with the HS-SE services.

**Figure 12 – Passenger satisfaction by service type**

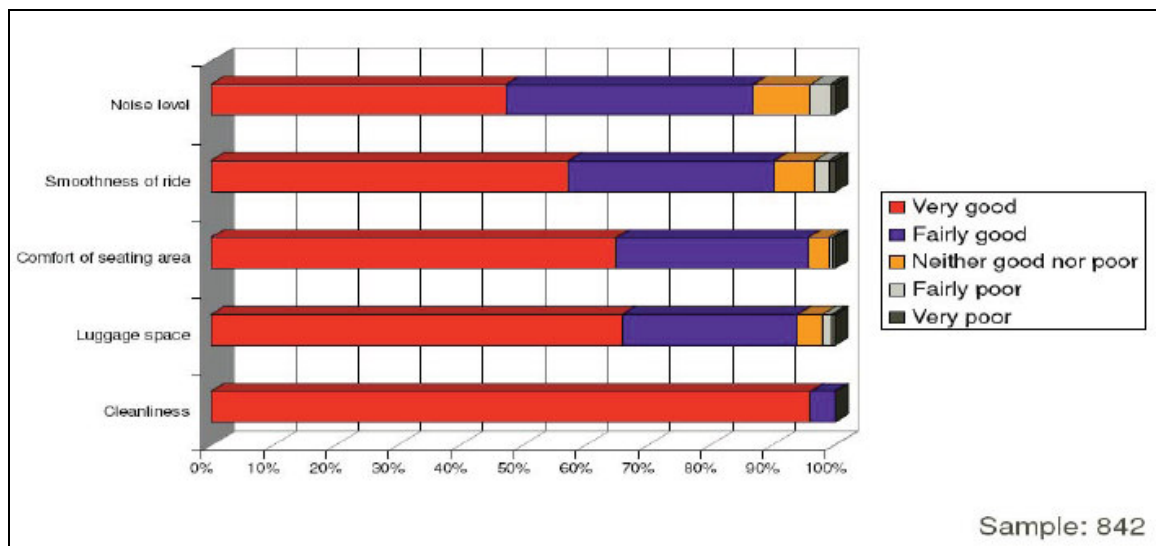


Source: Southeastern

*"The whole package makes travelling easy, which is not a word I would use for current train travel. Everything from start to finish of using this service is easy and also helps me continue the rest of my journey."*  
Artist, Dover.

This is not to say that high-speed service users have lost their ability to discriminate: Figure 13 shows some variation across different features of the service. Few users in the 800+ sample judged any areas to be poor, but there is some concern over noise levels (the tunnel sections are probably the source of this result), and ride quality. And while it has been noted that this is a 'no frills' service compared with other high-speed rail services, it should be remembered that this is a commuter train, designed as such, albeit for high-speed operation.

**Figure 13 – Passenger satisfaction breakdown**



Source: Southeastern

## 5. Economic Regeneration

Economic regeneration is not an inevitable consequence of high-speed rail service provision, as has been highlighted previously by Greengauge 21 and a number of researchers. Much depends on local regeneration initiatives, and then it is inevitably a complex task to disentangle the effects of regeneration initiatives from transport investment.

A recent report<sup>3</sup> suggests, for instance, that most economic impact studies of high speed rail lines, like other transport investments, may have modest economic growth impacts, typically less than 1% of GDP overall, but as high as 3% in the most affected regions. Of course, while these increases may be said to be modest, actually a single percentage point increase in GDP is sizeable and of great value. At certain high speed station sites there may be expected to be large increases in commercial activity and commensurate increases in land values, with uplifts in excess of 50% having been observed.

This same research noted that Ashford is a medium sized market town, not a regional centre on a par with Cologne, Lille, Lyon or Seville. It suggested that Ashford might be better compared with – and have more in common with – intermediate stations and places served by the European HSR network, such as Calais Fréthun, Haute Picardie, Le Creusot or Macon Loché on the French TGV network. This may be so in terms of scale, but typically these secondary TGV stations are not in urban centres and are relatively poorly interconnected with existing transport networks. Relative to such places, Ashford has the advantages of an HSR station that is well interconnected, that is in an established urban centre and, moreover, one with an established regeneration objective and status.

*“It says to the UK people ‘we’re making things better’ and to the rest of Europe that no matter how hard things are, that we’re prepared for the future.” Restaurant owner, Ashford, commenting on the HS-SE services.*

In 2008, work carried out for Kent County Council<sup>4</sup> showed that commuters from Kent to London have higher incomes than non-commuters and non-rail users. The report concluded that there is potential for people to be attracted to live in Kent to take advantage of the combination of lower house prices and the shorter journey times into Central London that will be delivered by the HS-SE services.

A useful review of research into the impact of HSR in Kent was prepared for *Locate in Kent* last year<sup>5</sup>. Included in this review was a study of the effects on residential house prices, office costs, costs of retail property and vacancy rates of several European locations including those served by HSR (such as Brussels, Lille and

<sup>3</sup> Preston, J., Larbie, A. and Wall, G. (2008). The Impact of High Speed Trains on Socio-Economic Activity: The Case of Ashford (Kent). Paper presented to the 4th Annual Conference on Railroad Industry Structure, Competition and Investment, Universidad Carlos III de Madrid. Transportation Research Group, University of Southampton.

<sup>4</sup> MVA, *ibid*. From which it might be argued that an increase in commuting could be associated with a raising of income levels, reflecting the agglomeration economic of London in particular.

<sup>5</sup> Karima Kamel and Richard Matthewman The Non-Transport Impacts of High Speed Trains on Regional Economic Development: A Review of the Literature, November 2008.

Ashford)<sup>6</sup>. The study noted that house prices in Ashford increased at a rate that was above the average of other SE England towns and that this coincided with the opening of Ashford International station in 1996.

For office developments the economic effect of high-speed rail is generally positive: with rents having risen in Ashford and elsewhere. But in other locations, the effects of HSR have been neutral so far, but may be expected to become positive in the near future (e.g. St. Pancras and Stratford). In some cases (e.g. Leiedal, Armentieres, Ebbsfleet) it will be some time before any economic effects can be identified because development associated with HSR start-up are affected by the onset of recession.

*“The estate agents in Ashford have reported seeing a very noticeable increase in interest in houses in the area...and one of the leading property developers has just rented some commercial space at a very good rate, so it shows that there is some movement already.”*

*Managing Director, Ashford, November 2009.*

Those interviewed for Greengauge 21 stressed the value of the new opportunities offered to businesses in Kent, particularly as the economy emerges from recession and companies look for cheaper but well-connected locations. The HS-SE services are seen as a clear demonstration that Kent is becoming better connected than ever to London, the rest of Britain and Europe, making it a more interesting place to invest in and relocate to.

The value of the high-speed services in stimulating tourism was also highlighted by Kent businesses, aided by the greater recognition and use by tourists of St Pancras as a hub station, and with the potential publicity boost of the Olympics yet to come.

*“A tourist has probably never heard of a place called Folkestone, so they wouldn’t think to come out to here. However, St Pancras is such a hub now it allows for people to start exploring.”*

*Website manager, Folkestone.*

As European experience has demonstrated<sup>7</sup>, the question of whether HSR is an effective agent for regeneration depends to a large degree on the response and appetite for regeneration amongst the communities it serves. Already across Kent it is clear that some places have been keener to embrace the benefits HSR can bring than others. Examination of the various promotional websites shows that both Ashford and the Kent Thameside area have been extremely proactive in citing the advantages to residents and businesses that HSR would bring. Dover is another location where, perhaps with a longer understanding of the need for action to retain and create employment, there has been more activity. Other locations in Kent which do stand to gain substantially from HS-SE services appear less enthusiastic for the potential redevelopment that could follow.

<sup>6</sup> High Speed Train Impact Study (April 2008) - SEEDA, Transportation Research Group and Transport & Travel Research.

<sup>7</sup> Greengauge 21, *High Speed Trains and the Regeneration and Development of Cities*, June 2006.

Respondents in our November 2009 survey noted the potential benefits to places such as Ebbsfleet, Ramsgate and Dover as well as Ashford and particularly noted the potential for redevelopment and growth at Ebbsfleet where there is currently little economic activity in the immediate vicinity of the station.

The French experience on regeneration indicates that there is a window of opportunity stretching from about three years prior to a new service launch forward to (say) four years after launch, during which period new development built in response to the accessibility benefits of HSR can be expected to arise<sup>8</sup>. Beyond that period, the newly enhanced services become 'taken for granted'. The implication is that in some parts of Kent – and these are areas with high levels of unemployment and in need of an economic boost – there is an urgent need for action to ensure that they capitalise on the potential benefits of the HS-SE services.

We have focussed in this discussion on the regeneration effects in Kent because the regeneration question in the Thames Gateway and in locations such as Stratford or Kings Cross has been the subject of continuing debate<sup>9</sup>, which has not yet been illuminated by any attempt to separate out the impacts of the HS-SE services from those stimulated by Eurostar. To some extent this also arises in respect of Ebbsfleet and Ashford since these lie in nominated growth areas (but not to any significant extent in other places that will benefit from the HS-SE services).

Work carried out for the Kent Select Committee revealed some insights into the views of those engaged in the property market, one year ago. Awareness and effects at that time are summarised in Table 2.

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<sup>8</sup> Discussion with Vince Lucas, Commercial Director at Southeastern Trains. The 'build up' of demand in response to a service change is widely held to take 3 years or so. However, the effects can take place over a much longer period. Research by Steer Davies Gleave for Network South East carried out in 1986 showed that the effects of electrification of London commuter lines (which brought substantial speed ups and other timetable improvements, as well as new rolling stock) could be detected over a much longer period, of 20 years or more. The reason has much to do with the low propensity to relocate home, especially amongst families with school-age children. The implication is that while the regeneration 'window' may indeed be short, the period over which above-normal demand growth can be expected is much longer.

<sup>9</sup> Regeneration has been variously estimated at having a value of £17.5bn (recent work for LCR) and £400m (NAO). The difficulty is that regeneration was taking place in the Thames Gateway before CTRL was routed through it; add in the complications of the Olympic Games investment in the area, with its focus on legacy benefits, and the separation of contributory sources becomes very difficult indeed.



**Table 2 – Summary of opinions on High Speed Rail and development  
(October 2008)**

<b>Witness</b>	<b>Are your clients aware of HS1?</b>	<b>Has HS1 had any impact on property at present?</b>	<b>Will HS1 have a future impact on property?</b>
Hirst (Commercial)	Yes	Not yet	Yes – considerable impact
Mouchels (Residential)	Unknown	Some impact	Yes
Mouchels (Commercial)	Unknown	Not yet	Limited impact especially in short term
Hobbs Parker (Residential)	Yes	Yes – some speculation occurring	Yes – extra 5% increase in prices due to HS1
Cluttons (Commercial)	Unknown	Unknown – overshadowed by credit crisis	Limited
Cluttons (Residential)	Yes	Yes – especially around Ebbsfleet	Yes – may be reduced due to large supply

Source: Kent County Council, *ibid*.

A particularly valuable insight into the question of how journey times might bear on commercial locational questions was the observation from the Select Committee report that a journey time to London of one hour acted as some kind of threshold; journeys remaining longer than this would appear to preclude there being a major impact on commercial development. This would suggest a major benefit from HS-SE at Ebbsfleet and Ashford could be expected, extending to the Medway towns, Canterbury and Folkestone – all of which will have sub-60 minute services – but perhaps not (for commercial development) into Thanet.

There does not seem to be a similar threshold for residential development and regeneration, where the view from the 2008 Select Committee work can be summarised as follows:

*“house prices around High Speed stations [are expected] to rise over a period of five to seven years from 2010, by which time the housing market as a whole is expected to stabilise. The rate of increase is forecast to be up to 12% in areas with the shortest journey times such as around Ebbsfleet, with around 7% in areas with longer High Speed journey times such as Thanet.”<sup>10</sup>*

<sup>10</sup> These are the views of one of the property experts giving evidence to Kent County Council’s Select Committee in October 2008.

## 6. Longer Term Possibilities

Once the HS-SE service to St Pancras is well-established, there is the scope for services to operate from HS1 across London, with a call at Stratford station and onwards to key locations to the north and west of London, further reducing any sense of isolation experienced at locations in Kent.

Such services require the availability of paths to the north on the rail network. One potential service opportunity worth consideration in due course, assuming that HS2 proceeds, is the creation of services between Kent and locations on the West Coast Main Line (where paths should become available with the transfer to HS2 of current 'InterCity' services). This would create a fast and direct service that might operate, for instance, between Milton Keynes/Hemel Hempstead/Watford and Ashford/Canterbury/Ramsgate, serving the key gateway station at Stratford *en route*.

There is also the possibility that some of the longer distance high-speed services operating over HS2 (and other parts of the national high-speed rail network in future) could be extended over suitable connecting lines to operate to/from Stratford and the HSR stations in Kent.

Such developments would further reduce any sense of isolation from the rest of the country that might be felt by residents and businesses in Kent, a benefit that has already been noted following the creation of the Preview HS-SE services.

The development opportunities don't end there, however, because there has been discussion for some time of the creation of a service across the channel, calling at all intermediate stations between London and Lille ('Trans Manche Metro')<sup>11</sup>. And there are other possibilities to extend the existing service such as by extending the HS-SE services *via Ashford* to Hastings which could reduce the journey time between London and Hastings down to 75 minutes (a saving of 15 minutes)<sup>12</sup>.

As HS1 gets busier, and greater value is derived from the investment to create it, there will be a need to examine ways of achieving greater consistency in operating performance between train types.

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<sup>11</sup> Such services would require a new rolling stock fleet.

<sup>12</sup> This would require electrification of the Ashford-Hastings line and re-modelling at Ashford station.

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