

# High Speed One at 10: measuring HS1's impact on Kent's visitor economy



## Foreword

In HS1 we have had a highly successful high speed railway in the UK for ten years now. In particular, growth on the line has been consistently impressive – 12% since services started. This year, HS1's 10th anniversary celebrations have given us a lot to reflect on in terms of the impact the line has had on growth and regeneration in the region.

The line has provided invaluable connectivity for visitors by reducing journey times from London and the continent drastically. The ease of access to the region has subsequently catalysed regeneration, investment in new businesses and allowed Kent to grow what is now a thriving tourism industry.

It is widely understood that HS1 has played a major role in the region's growth, improving connectivity and opening Kent up more than ever before. However it is particularly pleasing that our work, in partnership with Visit Kent, Kent County Council and Southeastern, to encourage visitors to experience all that the region has to offer is proving successful.

This study has highlighted some exciting findings that not only recognise the importance of HS1 to Kent's booming visitor economy, but also the potential for future growth to come. We believe that there is potential for the region's tourism economy to grow even further, and are committed to ensuring that we continue to provide a quality rail service that allows Kent to turn opportunity into reality.



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## Introduction

HS1, the UK's only high speed rail line, has been a key driver of growth in the South East since opening in November 2007. Now in its 10th year, it is still setting the benchmark, not only for future high speed rail projects, but the rail industry more widely, both in the UK and internationally. The economic and regenerative effects of HS1 on the Kent region are well understood: as of 2009, when domestic services began, the high speed line has attracted a minimum of £3.8 billion in economic and social benefits. From the 15,000 new homes planned at the Ebbsfleet Garden City to the rapid regeneration of - and increased investment in - towns such as Margate and Broadstairs, HS1 has opened up Kent to a wealth of economic opportunity.

Now recognised as one of Europe's top tourism destinations, the visitor economy is flourishing in Kent: HS1 provides a rapid service from London for holiday makers, encouraging people to experience all that the county has to offer.

Earlier this year HS1 Ltd, the company that owns and operates HS1, set out to understand the true extent of the line's impact. Over the course of four months a research group, comprising Visit Kent and tourism economists Destination Research Ltd., used train path statistics and qualitative and quantitative data from tourists and Kent businesses, to understand how, and to what extent, HS1 has impacted Kent's visitor economy. The findings, detailed below, identify the extent to which HS1 has driven tourism to Kent, the impact it has had on the associated business community and the full economic impact of the line on the region's visitor economy.

## Key findings

### Leisure tourism to Kent via HS1 is growing rapidly

- Leisure journeys to Kent via HS1 have increased almost nine-fold, from 100,000 in 2010 to 890,000 in 2016
- It is estimated that 32% of all journeys made on HS1 in 2016 were leisure related

### HS1 is an important factor in the decision to visit Kent

- Almost one third (30%) of all those surveyed were influenced in their decision to visit Kent by the presence of the HS1 service
- Almost half (47%) of all visitors to Kent who travelled by rail did so via the HS1 service
- Of those who travelled by rail to Kent, over 10% said that they would not have visited Kent without the presence of the HS1 service

### The vast majority of tourism businesses in Kent say that HS1 has increased leisure tourism

- Almost three quarters (73%) of tourism businesses in Kent believe that leisure tourism has increased as a result of HS1
- Over half (54%) of tourism businesses in Kent believe that HS1 has specifically benefitted their own business
- 94% of tourism businesses stated that they had benefited because of HS1's high speed connections, with 80% saying that HS1 has helped attract visitors from further afield

## HS1 has had a major economic impact on Kent's visitor economy

- The total direct expenditure by visitors using HS1 during 2016 was approximately £56.5 million, with an additional indirect expenditure of approximately £16.9 million; the total economic impact of HS1 on Kent's visitor economy in 2016 is valued at £72.7 million
- For every HS1 leisure journey made to Kent in 2016, £81.65 was added to Kent's local economy
- The total economic contribution to Kent's visitor economy since domestic HS1 services began is estimated at over £311 million
- The total number of tourism sector jobs in Kent created and supported by HS1 since domestic services began is 5,766

## Methodology

A research group comprising Visit Kent and Destination Research Ltd. designed and produced this study, carrying out data gathering and analysis over a four month period from April to July. The methodology for this study involved the following components:

- Literature review
- Secondary Research
- Visitor Survey (over 400 interviews)
- Business Survey (175 Kent tourism businesses)
- Economic Impact Assessment

Over 400 visitors and 175 businesses were surveyed over the four month period. Visitors were surveyed using random sampling between 30<sup>th</sup> April and 5<sup>th</sup> June 2017, and filter questions were used to exclude residents and those visiting for purposes aside from leisure. Relevant rail traffic data was sourced from the ORR, HS1 and Southeastern. The economic impact assessment was undertaken using the respected PRIME and Cambridge Models. Full details of the methodology are included in the full report.



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