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| To | Inspector | **Memo** |
| Cc | | |
| From | Rother Valley Railway | |
| Date | 15 July 2021 | |
| Project | Rother Valley Railway TWOA Inquiry | Project No. |

# Clarification on visitor numbers, mode shift and rail demand

1. Following Mr. Higbee's evidence and cross examination on 14th July, we undertook to provide clarification on the additional visitor numbers and rail demand, in the context of the secondary mode share assumptions made around the transfer of 'existing' visitors (i.e. visitors from within the established car catchment) to rail.

## Additional Local Visitor Numbers

2. The additional visitor demand to the local area, to which economic benefits are attributed, are estimated to be 22,000 visitors per annum. This is summarised in Para 3.52 and Table 3-1 of Mr. Higbee's main proof (**RVR/W2/1**), as below.

*Demand Summary*

3.52 A summary of our estimated increase in local visitor demand is presented in the table below. Our central case forecast is for an increase in visitor numbers to the local area of 22,000 as a result of the Rother Valley Railway 'missing link', representing an overall increase of 25% above current KESR demand. The majority of this arises from the new rail-based market that is created from the new connection at Robertsbridge. This forecast is used to assess the local economic impacts in the remainder of this chapter.

**Table 3-1: Summary of Additional Visitor Demand arising from the Rother Valley Railway**

| Demand Estimate | Assumption | Value (Visitors per annum) |
|---|---|---|
| **Base Demand** | | |
| Base demand on KESR | Total KESR demand in 2017 | 88,400 |
| **Additional Demand** | | |
| Increased KESR demand from delivery of RVR | + 15% of base KESR demand, due to new rail market and expanded highway catchment. | 13,300 |
| Increase in Bodiam Castle trips | +5% in overall trips to Bodiam Castle | 8,800 |
| **Total additional demand on KESR (central case)** | | **22,000** |

3. Of the additional demand for KESR, the breakdown by mode of access is as follows, as set out **in Para 3.48 – 3.50 RVR/W2/1)**:

- 85% of the increase in 'base' KESR demand would access by rail via Robertsbridge, with the remaining 15% accessing Robertsbridge by car. This equates to 11,300 additional trips accessing by rail, and 2,000 by car.

- 100% of the additional Bodiam demand (8,800 trips) would access via the KESR and mainline rail (the RVR provides a new rail access opportunity to Bodiam, but does not affect accessibility by car, hence all new Bodiam demand accesses by rail).

4. The combined effect of the above is that we forecast 20,100 additional rail trips to Robertsbridge, and 2,000 additional car trips to Robertsbridge, from wholly additional visitor trips to the area.

5. These form the 22,000[1] visitor trips that are wholly additional as a result of the RVR, and that underpin the 'central' case economic impacts. These are as per set out in the identical Table 2.1 and 3.1 of Mr. Higbee's main proof (**RVR/W2/1**). Table 2.1 is shown below.

**Table 2.1: Economic Impact of the Rother Valley Railway (2018 prices)**

| | Low | Central | High | Notes |
|---|---|---|---|---|
| Additional KESR Trips | 15,400 | 22,000 | 28,600 | |
| Additional direct effect £ p.a. | £656,400 | £937,700 | £1,220,000 | Based on £42.55 per visitor |
| Total economic impact £ p.a. | £803,900 | £1,148,400 | £1,493,000 | Based on multiplier of 1.22 |
| **Total economic effect – local area £ p.a.** | **£742,700** | **£1,061,000** | **£1,379,300** | **92% of total** |

## Mode Shift Assumptions

6. Additionally, secondary assumptions were also made for the level of current visitor demand to the local area that could, with the RVR, instead access by rail rather than car, as set out in Para 3.78 – 3.82 of Mr. Higbee's main proof (**RVR/W2/1**). It is assumed that:

- 1% of existing car-based trips to KESR (accessing at Tenterden) instead access by mainline rail at Robertsbridge; and
- 1% of existing trips to Bodiam Castle transfer from car to accessing by KESR and mainline rail via Robertsbridge[2].

7. These assumptions inform the assessment of inform and underpin the 'Transport Impacts' outlined from Para 3.72 of Mr. Higbee's main proof (**RVR/W2/1**), but **do not** affect the total scale of local economic benefits, as these individuals do not represent 'new' visitors as they already visit the area, just by a different mode.

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[1] Differences due to rounding. All impacts and benefits are based on actual numbers, but for presentational purposes are presented to the nearest 100.

[2] The 1% is applied to all existing Bodiam demand. In reality, a proportion of 'existing' Bodiam demand already accesses Bodiam via Tenterden / KESR. This is estimated at around 35,000 trip per year, based on an estimate provided by Mr. Dewey. This would suggest that the 1% assumption should be applied to the 'residual' Bodiam demand after stripping these out i.e. c. 141,000 trips of the total 176,000 Bodiam demand. Applying this would have no effect on the total additional visitors or economic benefits, and a very small reduction in 'modal transfer' rail trips (350 trips – 1% of the 35,000) in Table 5-5, and a correspondingly small impact on the 'benefits from mode shift – decongestion' impact within Table 5.3 of RVR/9. Due to the very marginal impact of this on the transport benefits and rail revenues, and as it has no impact on the economic benefits, we have not adjusted for this in this note.

8. The impact of this mode shift assumption is that the overall rail demand accessing at Robertsbridge would be as is currently set out in Table 5.5 of the Rother Valley Economic Impacts Report (**RVR/9**), as below.

**Table 5-5: Additional Rail Demand and Revenue on the National Rail Network**

| Source of Demand | Trips (p.a.) |
|---|---|
| New rail demand for KESR | 11,270 |
| New rail demand at Bodiam | 8,780 |
| Modal transfer to rail (existing trips KESR & Bodiam) | 2,140 |
| **Total additional rail journeys p.a. (two-way)** | 22,190 |
| Total additional rail trips (one-way) | 44,390 |
| Assumed yield per trip (£) | £8.00 |
| **Annual revenue** | **£355,100** |

Note: All numbers fully consistent with all tables above and within evidence provided. Numbers in Table 5.5 are rounded to the nearest 10, and those in preceding tables and all text to 100.

9. This outlines how both the new local visitor demand of 22,000 (11,300 for KESR; 8,800 for Bodiam), combined with the assessment of the modal transfer to rail (2,100 trips), is used to estimate:

- A total of 22,200 return journeys per annum on the National Rail network, as a result of the additional trips on the KESR by people accessing via the rail network.
- An additional £355,100 per year to the mainline rail operator.

10. These figures are as set out in Para 2.14 and 3.98 of Mr Higbee's main proof of evidence (**RVR/W2/1**).

11. In light of the above, there is no need for a correction to be made to paragraph 3.98 of the Proof.