

JOIN LONDON ST. PANCRAS HIGH SPEED ON THE JOURNEY AHEAD

It is a hugely exciting time for international rail.

Our 2025 Passenger Demand Study, developed with **Steer***, shows that the international rail market has the potential to triple by 2040.

This will be driven by demand. There is a significant opportunity with both business and leisure travel, with eco-conscious passengers wanting stronger international connectivity by rail and access to new European destinations with fast, city centre to city centre journeys.

The report also calls for a dedicated government strategy for international rail to unlock this growth. By working together, industry and government can address barriers enabling the market to reach its full potential and deliver economic and environmental benefits.

We invite you to join London St. Pancras Highspeed on the journey ahead.

TRAIN VS PLANE CONSUMER DEMAND FINDINGS



Greater demand for eco-friendly travelling, with one third flying less by air for climate reasons



Where air-rail journey times are equal, **9 out of 10** passengers would choose rail



Where overall journey times are **1.5** hours longer, **50%** of passengers prefer to travel by train



Demand increases can unlock commercial opportunities for new services, new routes and the potential for new operators

POTENTIAL BY 2040...

11M → 35M

Modelling suggests market has the potential to triple

30%

Fare reductions expected

18

Additional return services per day

4-5

Potential new Western European destinations by 2040



Scan to read about the opportunity for international rail



Join the conversation and follow us on London St. Pancras Highspeed's LinkedIn

*Steer were commissioned in 2025 to explore the future potential demand and growth opportunity.