

Ashford International Station Prospectus

A Platform for Growth



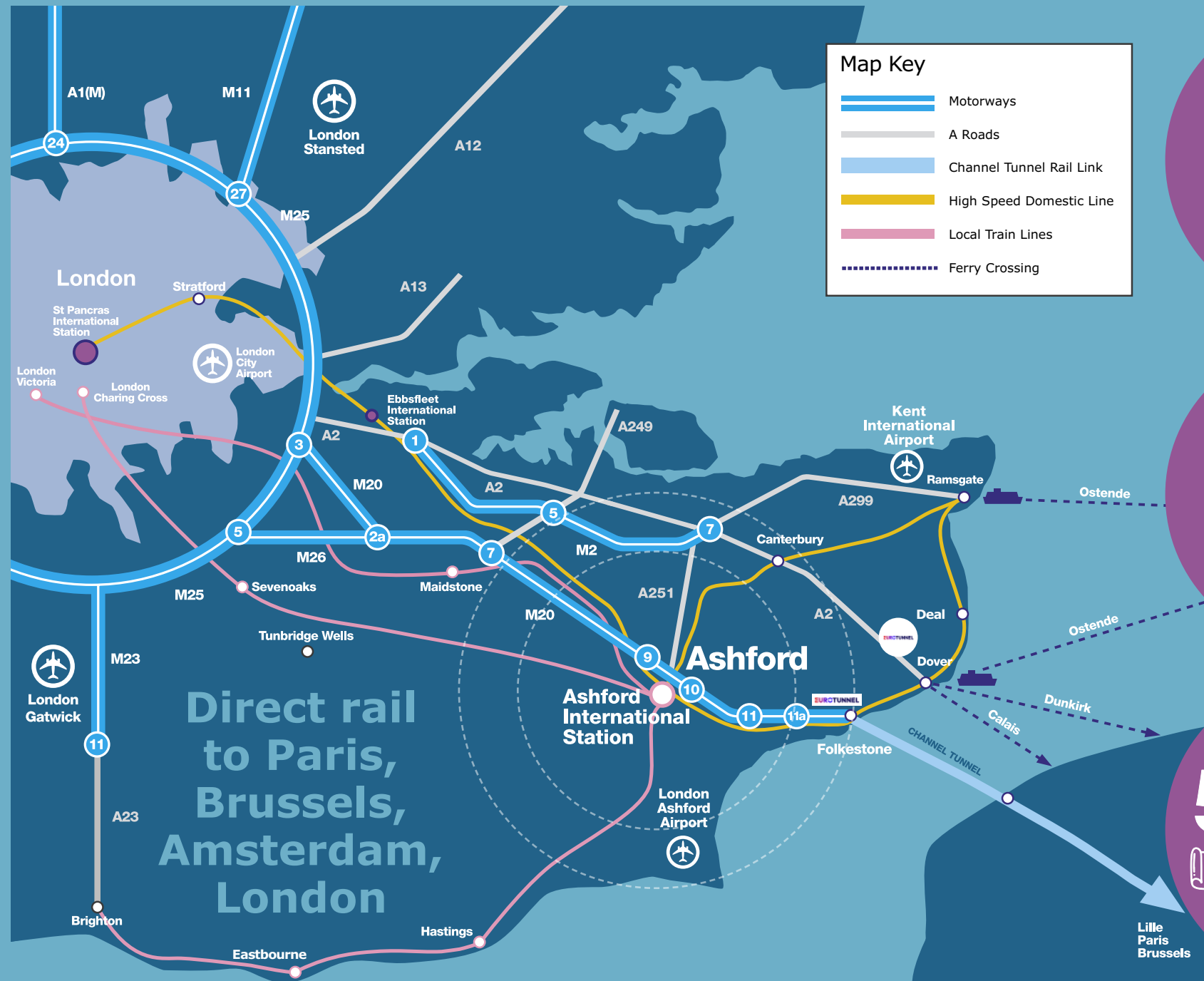


3.5 million
passengers
→ travelled
through Ashford
in 2023/24

Ashford
International
is in the top
6%
of busiest
rail stations in the country

Contents

Map, Infographics, Key Information	4
Ashford International: Your Platform for Growth	6
Tapping into a Growing Market Beyond London	10
Inbound Opportunities	12
Outbound Opportunities	17
Proven Demand, Untapped Potential	18
Station Infrastructure	21
Direct Rail Connectivity	22
Station Resilience	22-23
Cost and Convenience Advantages	23-24
Market Potential	26
Future Growth: New Communities, New Passengers	27
Contact Information & Partnership Opportunities	28



1,800
parking spaces

Passenger Growth
750K
to 2040

5m people
within 2 hours



Ashford International – Your Platform for Growth

Ashford International Station provides international rail operators with a **low-barrier entry** to the UK market, backed by **strong growth potential**. Strategically located on the London–Paris corridor, it offers **operational readiness, demonstrated passenger demand, and coordinated regional support** – creating a **seamless platform for launching international services**.

Why Ashford? Strong Passenger Demand

Forecasts indicate **substantial untapped demand**. In Year One, Ashford is expected to serve between **350,000 and 600,000 international passengers**, potentially growing to **750,000 annually by 2040**.¹ This aligns with wider South East trends, where market demand is set to grow by 25%.

A Clear Market Gap

Despite its proximity to Europe and strong domestic rail links, Kent currently lacks direct international rail services. Passengers must travel into central London to access Eurostar, adding cost, time, and complexity. Ashford is ideally placed to fill this gap. With **over five million people living within two hours' drive**, the station sits at the centre of a **large, underserved catchment**.

Backed by the Region

Ashford is **integral to regional growth plans** and enjoys strong backing from public and private partners. Kent County Council, Ashford Borough Council, Local Enterprise Partnership and the Kent Chamber of Commerce all support the return of international rail services. This reflects a shared ambition to **strengthen cross-border links, boost tourism and inward investment, and unlock housing and employment growth through improved connectivity**.

Business-Ready Infrastructure

Ashford is equipped to **resume international services with minimal intervention**.

Each international platform supports up to 850 passengers, while the terminal's design allows seamless management of multiple trainloads. The station has **two international and four domestic platforms**, supporting operational flexibility. With **1,800 parking spaces, 1,100 dedicated to international users**, it supports a **park-and-ride model, attractive to both business and leisure markets**. Located next to outlet retail, accommodation, business parks and employment hubs, and offering direct rail to London and easy M20 access, Ashford is a **convenient and strategic launch point for international travel**.

¹ Kent International Stations Market Study, Kent County Council, March 2024



"At London St. Pancras Highspeed, it's our mission to grow both domestic and international rail travel, especially as our high-speed line is currently operating at just 50% capacity. Ashford International Station located on the high-speed line, offers an opportunity for international operators to maximise their exposure to the UK market with strong growth potential. The station is integral to regional growth plans with strong backing from public and private partners. With only minor infrastructural intervention,

Ashford can be revitalised as a hub for international travel"

- Robert Sinclair, CEO of London St. Pancras Highspeed



Tapping into a Growing Market Beyond London

Ashford International Station is a **gateway to one of the UK's fastest-growing areas** outside London. Located in the heart of Kent, Ashford offers a scalable platform for rail operators seeking access to a dynamic, expanding market.

Ashford's population reached **132,700 in the 2021** census, which is an **18.5% rise since 2011** and double the UK average. This **strong local growth** reflects wider regional momentum expected to continue for decades.

Domestic rail use has more than doubled in 20 years: from **1.79 million passengers in 1998/99**, to **2.76 million in 2008/09**, peaking at **4.10 million in 2018/19**.²

International demand is proven. Ashford served **614,000 international passengers in 2006**, (approximately 8% of total travellers), before service reductions diverted traffic to London.³ With renewed focus, that market can **return and grow**.

Looking further afield, international high-speed rail travel is set to triple by 2040, increasing from 11 million passengers to 35 million passengers per year.^{3a} Passengers are also increasingly choosing rail over air.

Future Passenger Potential

Ashford's international catchment continues to grow, driven by regional development:

- **Today:** 350,000–600,000
- **By 2030:** 395,000–675,000
- **By 2040:** 440,000–750,000

This population-driven growth offers operators **a compelling opportunity, without the constraints of London-based infrastructure**.⁴

² Office of Rail and Road (ORR) station usage statistics, <https://dataportal.orr.gov.uk/statistics/usage/estimates-of-station-usage/>

³ Kent Messenger, 2006 and Bring Back Euro Trains, Returning International Rail Services to Kent Report - <https://enrouteic.com/wp-content/uploads/2025/01/BBET-and-Enroute-Joint-Report.pdf.pdf>

^{3a} <https://stpancras-highspeed.com/news/travel-by-international-high-speed-rail-set-to-triple-by-2040-with-ticket-prices-falling-by-a-third/>

⁴ Kent International Stations Market Study, Kent County Council, March 2024

Year-Round Demand Across Seasons

Ashford provides consistent and seasonal flows of leisure and business travellers:

- **Spring/Summer:** High-income tourists visit vineyards (Gusbourne, Chapel Down), castles (Leeds Castle), and Canterbury Cathedral.
- **Autumn:** Wine festivals and countryside retreats fill the shoulder season.
- **Winter:** Ashford Designer Outlet draws over 3.5 million annual visitors; ski traffic and festive trips add further volume.⁵
- **Half-Terms & Holidays:** Disneyland Paris remains a major UK destination with an estimated 2.7 million UK visitors in 2023. Marne-la-Vallée is just over two hours from Ashford by rail.

Ashford's demographic strength and transport connectivity make it a natural base for international rail services that can flex with both the calendar and regional growth.

⁵ AshfordFOR (2025) <https://www.ashfordfor.com/news/McArthurGlens-Ashford-Designer-Outlet>



McArthur Glen Designer Outlet, Ashford

Inbound Opportunities

Ashford International Station offers direct access to Kent, The Garden of England, and the wider South East. As the UK's closest high-speed gateway to continental Europe outside London, Ashford is uniquely placed to serve and grow inbound leisure and business markets.

Leisure Travel

Ashford is the natural launch point for inbound tourism to Kent. From vineyards and castles to a UNESCO World Heritage Site and retail destinations, the region offers broad year-round appeal.

- **659,000 foreign visits** to Kent in 2022 (down from 1.1M in 2016/17), including 70,000 from France—a market primed for recovery.⁶
- **124,500 international visitors** came to Ashford in 2023, exceeding 2019 levels.
- **Kent's £4.1bn tourism economy** supports over **77,000 jobs**, with Ashford contributing **435 tourism enterprises, 5,722 jobs**, and **£30.1M in visitor spend** across **0.5M guest nights** (2023 figures).⁷

Ashford offers **3,000+ hotel bed spaces** just minutes from the station, providing high-quality accommodation options. These range from major brands such as **Hampton by Hilton** (located opposite the station), **Premier Inn**, and **Ashford International Hotel**, to high-end boutique properties like **Eastwell Manor** and **Boys Hall**.

Eastwell Manor features a **luxury spa, fine dining, and extensive parkland**, delivering a high-end countryside retreat just a short distance from the town centre.

Boys Hall blends **17th-century heritage with modern boutique comfort**, recently winning national recognition for its exceptional design and hospitality. Together, these venues provide leisure travellers and business visitors with first-class amenities including spas, dining, flexible workspaces, and event hosting.

Key Attractions Nearby:

- **Ashford Designer Outlet**
– 6-min walk, 3.5M+ visitors/year
- **Leeds Castle** – 500,000+ visitors/year
- **Canterbury Cathedral** – UNESCO World Heritage Site, 1M+ visitors/year
- **Vineyards** – Including Chapel Down, Gusbourne, and Balfour
- **Port Lympne** – 400,000 visitors per year

⁶ Visit Kent Business – Economic Impact of Tourism Kent 2022
Report <https://www.visitkentbusiness.co.uk/media/100370/economic-impact-of-tourism-kent-2022-report.pdf>

⁷ Visit Kent – Economic Impact of Tourism Ashford 2023
Report <https://www.visitkentbusiness.co.uk/media/117890/economic-impact-of-tourism-ashford-2023.pdf>



Leeds Castle

"Over 25 years of significant investment has ensured Ashford International remains ready, keeping alive the opportunity to support European travel. Delivering on international services by re-opening this gateway to Europe holds the key to unlocking the benefits of that investment, not just in Ashford, but for the whole of Kent, wider South East region and the UK economy. Ashford International stands ready. Ready for trade – Ready for jobs – Ready for tourism – Ready to return"

Cllr Noel Ovenden, Leader of Ashford Council

38 
minutes
to London

129%
Growth 
in domestic rail use
2003-2023

16.1m
Disneyland
Paris visitors 
in 2023

Save 
£28-90
per person on
travel to London

International growth
incentive scheme
discounts of up to 
50% in year 1

14



Port Lympne Safari Park, Wild Animal Reserve & Hotel

15

Business Travel

Ashford's modern infrastructure and affordability make it an increasingly attractive base for inbound business activity. The station links directly to London, Paris and Brussels, and sits at the heart of East Kent's thriving economy. With a **strong cross Channel corporate footprint, many local employers travel back and forth** for meetings, site visits and supply chain coordination – making them natural **international rail customers**.

- Ashford is home to **540 digital creative firms** and **410 food & drink enterprises**, the largest clusters in Kent.⁸
- Ashford hosts major employers with **Cross Channel corporate links** (indicative demand for international rail):

- **Brakes** – operates in **France** and has its **Headquarters in Ashford**.
- **Coty** – offices in **Paris, Amsterdam and Switzerland**.
- **Givaudan** – multiple sites in **Paris, Brussels, the Netherlands and Switzerland**.
- **Lefebvre** – **Global HQ** in **France** and **UK HQ** in Ashford.
- **Tarkett** – **Global HQ** in **Paris** and **UK HQ** in Ashford.

As well as **Premier Foods, Saga**, and academic institutions like **University of Kent** and **Canterbury Christ Church**.

⁸ AshfordFOR - <https://www.ashfordfor.com/location-and-key-facts>

Outbound Opportunities

Ashford International is uniquely positioned to serve a **5-million-strong catchment within a two-hour drive**, covering Kent, Sussex, Essex, Surrey, and South East London. For both leisure and business travellers, Ashford provides a **cost-effective, congestion-free alternative to London-only services**, with the added convenience of **direct station access** and **drive-up parking**.



Coty headquarters (above), Hampton by Hilton (top right) and CQ38 offices (bottom right)

Proven Demand, Untapped Potential

Ashford International's cross Channel market is both **proven and resilient**. In 2006, Kent recorded **over 614,000 international rail travellers**, demonstrating the scale of potential demand.⁹ However, a **50% reduction in Ashford services between 2008 and 2019**, combined with **limited marketing** and **service timings that made day trips challenging**, significantly suppressed usage. Based on service level scaling, Ashford could have supported **around 470,000 annual journeys in 2015**, highlighting strong latent demand.¹⁰

With more than 11 million international rail travellers annually across the network, there is a clear opportunity to restore frequencies, improve connectivity, and unlock this proven market – turning untapped potential into real growth.

⁹ Kent Messenger, 2006 and Bring Back Euro Trains, Returning International Rail Services to Kent Report - <https://enroute.cic.com/wp-content/uploads/2025/01/BBET-and-Enroute-Joint-Report.pdf.pdf>

¹⁰ South East Local Enterprise Partnership's Ashford International Spurs Signalling and Power Upgrade business case - https://southeastlep.com/app/uploads/Ashford_International_Rail_Connectivity_Full_Business_Case.pdf

¹¹ The Brussels Times - <https://www.brusselstimes.com/417329/paris-remains-most-visited-city-in-the-world-with-44-million-tourists-in-2022>

¹² Kent International Stations Market Study, Kent County Council, October 2023

In 2022, the Paris region welcomed 44 million foreign visits, including 2 million from the UK – an 8% increase on pre-pandemic levels.¹¹ With **71 million UK outbound trips**, 2.8% went to Paris. Applying this benchmark to the **5.5 million catchment of Ashford International** suggests a base market of **150,000 Paris-bound travellers**.¹²

Given the South East's **proximity to international rail links** and **higher-than-average incomes**, this figure is conservative.

Realising this market depends on how services are operated, marketed and priced, with scope for a **second operator to unlock further demand** and test the upper bounds of this opportunity.



Ashford catchment 5.5m
150,000
potential Paris-bound travellers

Leisure Travel

Ashford's location makes it **a gateway for short-break Europe**, serving young professional, families and retirees seeking city getaways and easy access holidays with flexible travel schedules.

Disneyland Paris remains the clearest indicator of demand:

- **375M visitors** since 1992
- **16.1M in 2023** alone (10.4M Disneyland Park, 5.7M Walt Disney Studios)
- The UK remains the **#1 international market**: 17% of visitors in 2016—equivalent to **~1.7M British visitors** in 2023¹³
- Direct Ashford–Marne-la-Vallée services took just over 2 hours in 2019

For operators, Ashford represents **lower operational complexity**, and access to **high-income business travellers** seeking **time-efficient alternatives** to short-haul flights.

Fast journey times enable **same-day returns** to **Lille** (56 minutes), **Brussels** (1 hour 27 minutes), **Paris** (1 hour 52 minutes), **Marne-la-Vallée / Disneyland** (2 hours 4 minutes), **Amsterdam** (3½ hours).

Seasonal peaks are clear:

- **Half-term & summer:** Beach resorts, Disneyland Paris, European city breaks
- **Winter:** Ski trips to the Alps, Christmas markets, and festive retail travel

Business Travel

Ashford is **engineered for convenience**:

- **1,800 parking spaces** supports **seamless park-and-ride access**
- **Direct motorway links (M20)** avoid London congestion and save valuable time
- **No overnight hotel stays required**, avoiding costs of **£158+ per night** for early departures

Station Infrastructure

Ashford International is fully operational and **ready to resume international rail services with minimal additional investment**. The station is maintained to international operational standards and **built to handle high-capacity trains with ease, accommodating 850–900 passengers per train**.

The terminal already includes passport control and space for security facilities, with only deployment of Entry and Exit System (EES) and Police aux Frontières (PAF) resources required to become fully compliant with upcoming international border requirements. This makes Ashford one of the few UK stations outside London that is **practically service-ready for international operations**.

Ashford International Station is part of London St. Pancras High Speed, although the tracks passing through the international section of Ashford International Station and the signals, railway telecommunications and overhead line equipment are part of the NR Network.

Trains calling at Ashford International Station will have to comply with NRIL requirements, although the international platforms (3&4) have been altered to accommodate UIC GB vehicles only.

Power is supplied from the overhead catenary system which is compliant with the Energy (High Speed) NTSN at 25kV/50Hz AC. The contact wire height above rail level is generally set at 5.08m. However, the wire height through Ashford International Station platforms is set at a minimum of 4.68m.

The station building has embraced strong internal visual representation of destinations such as Disneyland and the opportunity exists to work together with London St. Pancras Highspeed to create a refreshed customer experience for train operators and the destinations they serve.

¹³ Road Genius - <https://roadgenius.com/statistics/tourism/france/disneyland-paris/>

Direct Rail Connectivity

Ashford International is far more than an international hub – it is a critical node in the UK’s domestic rail network, offering unmatched connectivity for travellers across the South East and beyond. Its unique combination of speed, convenience, and resilience makes it one of the best-positioned domestic rail stations in the country.

Passengers benefit from a comprehensive network of direct rail services, connecting Ashford swiftly to multiple destinations:

- **London St. Pancras International:** Just 38 minutes, offering direct access to the capital’s business, cultural, and tourism heartlands
- **Canterbury West:** 17 minutes to one of England’s most iconic cathedral cities, home to two major universities and rich cultural heritage

- **Folkestone Central:** A 14-minute journey to the south coast, ideal for weekend breaks and seaside business stays
- **Ramsgate:** Reach the east Kent coastline in approximately 40 minutes, unlocking access to sandy beaches and local attractions
- **Tonbridge:** Just over 30 minutes away, connecting into West Kent and the Sussex borders
- **Hastings:** Around 42 minutes by direct train to this growing creative and visitor destination

Station Resilience

Ashford’s location provides **resilience and flexibility** in times of disruption:

- It serves as a **key diversionary route for international services** unable to call at London
- Its position outside the congested capital and proximity to London St. Pancras Highspeed enhances operational stability

- The station **enables onward passenger travel**, either back to London or deeper into Europe, making it an ideal fallback and distribution point
- This flexibility supports route planning, contingency management, and enhanced customer satisfaction

For operators seeking to de-risk service delivery while maintaining access to high-demand regional and international markets, Ashford International is a strategic linchpin in any future-facing rail portfolio.

Cost and Convenience Advantages

Ashford International offers clear and measurable advantages for both passengers and operators, delivering greater value, lower costs, and smoother journeys outside the constraints of a London-only rail model.

For Passengers

By starting their journey at Ashford, passengers can bypass the expense and hassle of travelling via London. High-speed return fares to St. Pancras typically range from around £25.10 to £40.10 per person, adding up to approximately £100.40 to £160.40 for a family of four, making Ashford an attractive and cost-effective departure point for international travel.¹⁴ For early morning departures, many passengers are forced to stay overnight in London, adding a further £158 per night on average for accommodation.¹⁵

Ashford eliminates these burdens. With 1,800 parking spaces, Ashford offers drive-up convenience and accessibility from across Kent, Sussex, and the wider South East. Passengers can enjoy a faster, more affordable, and family friendly-departure with real potential to introduce regional fare packages tailored to this market.

¹⁴ Southeasternrailway.co.uk

¹⁵ Skyscanner & Lastminute.com

For Operators

For rail operators, Ashford delivers a compelling operational case:

- **No additional track access fees**, and in fact may trigger incentives as well as the opportunity to reduce track access charges on journeys to/from London
- **Reduced congestion and faster turnaround times**, improving service reliability and efficiency
- **Operational resilience**: Using Ashford as an intermediate stop adds recovery options south of London, supporting timetable regulation, dwell buffers for late running services, and flexible crew/rolling stock management to reduce knock on delays.

- **Unlock London St Pancras Highspeed incentives**: To encourage train operators to increase use of the high-speed line, London St Pancras Highspeed's **International Growth Incentive Scheme** offers **IRC discounts of up to 50% in year 1, 40% in year 2 and 30% in year 3**, plus a £1-per incremental passenger marketing fund.

The International Growth Incentive Scheme incentivises train operators to:

- Introduce new services
- Launch new destinations
- Connect intermediate stations
- Deploy new rolling stock
- Increase passenger volumes

Ashford is the smart choice for operators looking to optimise service delivery and expand their reach beyond traditional corridors.

"Ashford International stands at the heart of a fast-growing region, restoring direct international rail services here is an opportunity to tap into a significant number of potential journeys to drive sustainable, long-term growth from outside London into Europe"

- Wendy Spinks, Chief Commercial Officer at London St. Pancras Highspeed



Champneys Spa Hotel, Eastwell Manor



Market Potential

Ashford International is primed for scalable success, offering a strong initial market base, clear indicators of growing demand, and alignment with major residential and infrastructure expansion across the South East.

Immediate Demand, Proven Rail Use

Forecasts show **350,000 to 600,000 international passengers** could be served from Ashford in Year One, with longer-term growth potential reaching **750,000+ passengers annually** by 2040.¹⁶ These are not speculative figures – they build on historic demand and consistent growth in both population and rail usage:

- Domestic rail use through Ashford is up **129% over the past 20 years**
- **Ashford's population grew 18.5%** between 2011 and 2021—more than double the UK average

This demonstrates a resilient local appetite for rail travel, both domestic and international, and a strong foundation for renewed cross-border services.

Future Growth: New Communities, New Passengers

Ashford's role as a regional gateway is set to expand dramatically, supported by strategic housing delivery and regional planning priorities:

- Kent and Medway is projected to add **400,000 new residents and 200,000+ new homes by 2040**¹⁷
- **South Ashford Garden Communities will deliver 7,250+ homes**, directly linked to Ashford International
- **Otterpool Park Garden Town, with over 10,000 homes**, is less than 20 minutes away
- **Heathlands Garden Settlement will bring 5,000 new homes** within a 10–20 minute rail catchment
- Ashford Borough Council's Local Plan to 2042 and Regulation 18 housing growth targets reinforce these development trajectories

With **Kent's 1.6 million residents** and the wider **South East's 18 million population**, Ashford is not only well-placed for today's travellers, it is **strategically aligned with tomorrow's transport-integrated growth**.

There is also strong regional support for rail-led development, making Ashford the natural hub for future international services connecting with sustainable communities.



¹⁷ Kent International Stations Market Study, Kent County Council, March 2024

Contact

For further information and to explore partnership opportunities, contact:

Wendy Spinks

Chief Commercial Officer

London St. Pancras Highspeed

Wendy.Spinks@stpancras-highspeed.com

+44 (0) 7595 086424

Andrew Osborne

Head of Economic Development

Ashford Borough Council

Andrew.Osborne@ashford.gov.uk

+44 (0) 1233 330612

