RETAIL IN STATIONS: EUROPEAN EXPERIENCES
A FRENCH, BRITISH AND ITALIAN PERSPECTIVE

URBAN MOBILITY FORUM, CAIRO – NOVEMBER 2016

DR. ÉTIENNE RIOT
AREP DESIGNLAB, SNCF-GARES & CONNEXIONS
AREP IDENTITY

Created in 1997 when railway stations neighbourhoods were disregarded, AREP's core activity has always been to transform those particular areas into vibrant urban cores providing high quality amenities. We base our experience on:

**COMPLEX URBAN SECTORS**

**INTERMODAL HUBS**

**PUBLIC AMENITIES, SERVICES, RETAIL**

Every major public amenity frequented by a large number of people (museums and cultural amenities, hospitals, sports facilities, shopping centres, etc.) must accommodate all users, whether local residents or visitors, through the attention paid to all type of flows, quality of use and the expression of a strong identity.
OVERALL APPROACH

DESIGN STRATEGIES FOR RETAIL
OVERALL APPROACH
THREE ECONOMIC DIMENSIONS
OVERALL APPROACH
THREE ECONOMIC DIMENSIONS
An essential facility
OVERALL APPROACH
THREE ECONOMIC DIMENSIONS

A real-estate property
OVERALL APPROACH
THREE ECONOMIC DIMENSIONS

A new market place
OVERALL APPROACH
THREE ECONOMIC DIMENSIONS

An essential facility
A real-estate property
A new market place

Each dimension is made of financial techniques, regulation principles, actors and interests that are intercrossed with each others.
OVERALL APPROACH
COMPARATIVE STUDY - FRANCE
OVERALL APPROACH

COMPARATIVE STUDY - FRANCE
OVERALL APPROACH
COMPARATIVE STUDY - FRANCE
### OVERALL APPROACH

#### OUTCOMES – FRANCE – GARES & CONNEXIONS

The 12 stations where retail activities reduces station access charges

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<tr>
<td>1</td>
<td>PARIS GARE DE LYON</td>
<td>3,522</td>
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<td>2</td>
<td>LYON PART DIEU</td>
<td>5,760</td>
<td>6,116</td>
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<td>PARIS NORD</td>
<td>0,762</td>
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<td>PARIS MONTPARNASSE</td>
<td>3,490</td>
<td>3,098</td>
<td>2,268</td>
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<td>5</td>
<td>AIX EN PROVENCE TGV</td>
<td>1,552</td>
<td>1,782</td>
<td>1,558</td>
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<tr>
<td>6</td>
<td>NANTES</td>
<td>1,362</td>
<td>1,498</td>
<td>0,898</td>
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<td>7</td>
<td>AVIGNON TGV</td>
<td>0,922</td>
<td>1,108</td>
<td>1,408</td>
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<td>8</td>
<td>CHESSY MARNE LA VALLEE</td>
<td>0,366</td>
<td>0,790</td>
<td>0,912</td>
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<td>9</td>
<td>CANNES</td>
<td>0,248</td>
<td>0,248</td>
<td>1,092</td>
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<td>10</td>
<td>RENNES</td>
<td>0,738</td>
<td>0,598</td>
<td>1,092</td>
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<td>11</td>
<td>LILLE EUROPE</td>
<td>0,092</td>
<td>0,432</td>
<td>0,548</td>
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<td>12</td>
<td>PARIS AUSTERLITZ</td>
<td>0,586</td>
<td>0,128</td>
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Millions of euro, DRG 2013 2014 2015
Growth of concessions revenue in the turnover of Gares & Connexions’ retail activities.
OVERALL APPROACH
COMPARATIVE STUDY – ITALY
OVERALL APPROACH

OUTCOMES – ITALY – GRANDI STAZIONI

Type of spaces in the portfolio of Grandi Stazioni

- Retail spaces: 62%
- Rail offices and spaces: 38%

 Origine of revenue - General turnout of Grandi Stazioni

- Retail: 33%
- Office: 67%

Based on financial reports Grandi Stazioni 2010 2011 2012 2013 2014
OVERALL APPROACH
COMPARATIVE STUDY – UNITED KINGDOM
OVERALL APPROACH
COMPARATIVE STUDY – UNITED KINGDOM
OVERALL APPROACH
OUTCOMES – UNITED KINGDOM – HS1LTD

Average annual turnover  Retail revenue in the general turnover  Share of St Pancras retail and lease activities in the general retail revenue

150 m£  ➞  20 m£  ←  95%

Interview with HS1 CFO, September 2014
OVERALL APPROACH

DESIGN STRATEGIES FOR RETAIL
DESIGN STRATEGIES FOR RETAIL
KEY PRINCIPLES FOR RETAIL IN RAILWAY STATIONS

Transforming passenger flows

Finding a good balance between revenues and amenities

Making the station more attractive

Strengthening the urban integration of the station
TRANSFORMING PASSENGER FLOWS INTO OPPORTUNITIES FOR BUSINESS ACTIVITIES

AREP Flow studies

Retail Designers

Investors / commercial operators

Etienne Riot 2015
FINDING A GOOD BALANCE
PERMANENT IMPLEMENTATIONS 1
FINDING A GOOD BALANCE
ADVERTISING
MAKING THE STATION MORE ATTRACTIVE
IDENTITY
MAKING THE STATION MORE ATTRACTIVE

IDENTITY 1
MAKING THE STATION MORE ATTRACTIVE
IDENTITY 2

Source: Grandi Stazioni, 2015
MAKING THE STATION MORE ATTRACTIVE

IDENTITY 3

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<td>6</td>
<td>Eurostar</td>
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<td></td>
<td>M72 Calling at Calais, Lille</td>
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<tr>
<td>09:37</td>
<td>Disneyland Paris</td>
<td>5</td>
<td>Boarding begins at 09:20</td>
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<td>09:40</td>
<td>Sutton</td>
<td>A</td>
<td>Thameslink</td>
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<td>Barnsley</td>
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<td>Midland Mainline</td>
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<td></td>
<td>Calling at: Gatwick Airport, Luton Airport, Luton, Bedford, Wellingborough, Kettering, Corby</td>
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<td>09:10 A</td>
<td>Sutton</td>
<td>09:10 A</td>
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<td>Elstree &amp; B’wood Mill Hill B’way</td>
<td>09:24 A</td>
<td>Elstree &amp; B’wood Mill Hill B’way</td>
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<tr>
<td></td>
<td>09:30 B</td>
<td></td>
<td>09:30 B</td>
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<tr>
<td>Barnsley Leeds</td>
<td>09:33 1 Delayed</td>
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<td>09:42 3 Delayed</td>
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MAKING THE STATION MORE ATTRACTIVE
SINGULARITY
MAKING THE STATION MORE ATTRACTIVE

SINGULARITY
MAKING THE STATION MORE ATTRACTIVE

SINGULARITY

POT OF TEA

Fortnum’s Famous Teas - £4.75

Royal Blend
Breakfast Blend
Queen Anne Blend
Afternoon Blend
Darjeeling BOP
Classic Earl Grey
Countess Grey
St Pancras Blend
A STRONGER URBAN INTEGRATION
EVENTS
A STRONGER URBAN INTEGRATION PLACES
A STRONGER URBAN INTEGRATION PLACES
A STRONGER URBAN INTEGRATION
PLAYING WITH THE LEGACY OF INFRASTRUCTURES
CONCLUSION

Scales / organizations / design strategy
MERCI