



DESTINATION STATIONS

Exceptional travel
retail partnerships

London Bridge Station



At Network Rail, we manage the busiest travel hubs in Great Britain, with over 700 million people passing through our 19 stations each year.

Under our management these stations have become destinations; where travellers, non-travellers and the local community can come together to shop, eat and drink.

Passenger insights – gathered annually – tap into the passions and preferences of our customers. And our in-house experts combine this with their knowledge of trends and our station spaces to create the perfect retail mix.

The result? Carefully curated shopping and dining experiences that delight our passengers and encourage dwell time and spend.

We are the partner of choice for any business considering the travel market. Through long term leases, or short term pop-ups, exciting opportunities are available for established or emerging brands.

Because our business model bases rent on a percentage of turnover, retailer success is our success and we support our brands to deliver their business goals in our exciting, dynamic spaces.

Be part of the customer journey

“ON AVERAGE, OVER 700 MILLION PEOPLE PASS THROUGH OUR 19 MANAGED STATIONS EACH YEAR. WE WORK IN PARTNERSHIP WITH BRANDS AND RETAILERS TO CREATE EXTRAORDINARY PLACES WHERE COMMUTERS, WORKERS, RESIDENTS AND LOCAL COMMUNITIES ENJOY UNIQUE RETAIL EXPERIENCES IN EXCITING, CONTEMPORARY SURROUNDINGS.”

Hamish Kiernan
Commercial Director
Retail



145+ brands
operating within
19 landmark
stations



Over 600,000 sq ft
within major city
centre locations



£60 million
monthly sales



700+ million
visits per year



32.5% retail unit
penetration rate



£1,189 sales
per sq ft
(Annual average)



We have a truly collaborative dialogue with the 145+ brands we work with. Many of these are established favourites – known up and down Great Britain as best in class. And they sit comfortably next to engaging, emerging retailers, some of which are pushing the boundaries of retail experiences.

Each year, we welcome new retail partners to the portfolio. In 2022-2023, we delivered 21 new openings - including refurbishments - and 31 pop-up units. Our strategy is to continue to build upon this success.

Our business model means that rents are based on a percentage of turnover rather than on the space itself. So, your rent will depend on turnover potential – which is influenced by footfall, location and configuration. This means that from the outset it is in our interest to work together to ensure your business is as successful and profitable as it can be.

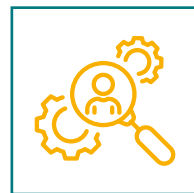
And our partnerships extend beyond landlord and tenant boundaries. We also work in partnership with local communities, brands, charities and business improvement districts, to deliver events and developments to the local area.





WORKING WITH OUR TEAM

When you work with us, our dedicated team will support you every step of the way. We'll be a guiding light and a sounding board for your business. We'll check in regularly and will also support you with:



A DEDICATED CATEGORY MANAGER
On hand to support your growth



QUARTERLY MEETINGS
Networking opportunities for your unit staff to get to know other retailers and local business stakeholders



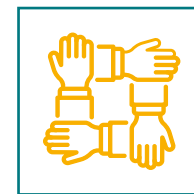
TRAVEL INSIGHTS
Retail and passenger intelligence, to influence decision making and business strategy



A RETAIL BUSINESS PARTNER
Your key link in the station



A RETAIL COMMUNICATIONS HUB
To keep you updated with everything you need to know



MARKETING SUPPORT
A dedicated marketing team, on hand to support with new openings, product releases or your promotional plan, highlighting retail best practice and social media support

PEOPLE PLANET POWER



Sustainability is a priority and a responsibility we take very seriously. Our Environmental, Social and Corporate Governance (ESG) standards are at the top of our agenda.



That's why we're collaborating with our partners to address environmental issues across our stations. 94% of our waste from landfill has already been diverted and during 2023 we installed smart meters to all retail units.

We continue to:

- › Remove all Single Use Plastic (SUP) plastic cutlery and cups from retail outlets
- › Roll out coffee ground recycling to all managed stations
- › Create and implement a coffee cup recycling scheme
- › Rollout the pay per bag system that incentivises recycling and punishes non-recyclables.



OUR RETAIL SPACES ARE FOR EVERYONE

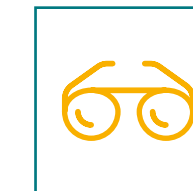
Whether it's someone using the station to catch a train, a resident or someone who works in the local area. Did you know that:



55% of consumers agree that the longer they spend at a travel hub, the more likely they are to make a purchase



80% of business travellers find rail to be their preferred mode of transport



59% of passengers are travelling for leisure, with an average spend of £38 per visit



Station average 17 minutes dwell time



More than two-thirds (67%) of purchases are impulse buys - with the most popular options being food for the journey at 75% and items to take home at 23%

SPOTLIGHT ON OUR CUSTOMERS

We've identified six consumer groups to enable us to best tailor our retail offering.



25% sociable spenders

The youngest and largest customer segment, they're also the biggest spenders and because they live or work nearby, they are regular users and love station-based events.



16% eager enthusiasts

This group is highly influenced by food trends and they live for new retail concepts. They are passionate about shopping with local brands and are interested in getting involved with in-station events and programmes.



14% convenience cravers

This group prefers eat on-the-go options and outlets – and convenience is key. Predominantly male, they have a higher-than-average household income and will pay a premium for anything that makes life easier.



14% environmentally engaged

Sustainability is everything for this group. They are eagle-eyed when it comes to retailers and their eco practices and they may be interested in more sophisticated vegan and vegetarian options – especially when eating on the go. Pop-up stores, exhibitions and new reasons to visit also appeal.



13% total traditionalists

An older group, this audience stays loyal to what they love. They are true to their favourite brands and are interested in getting involved with culture and arts exhibitions in the station environment.



13% station sceptics

This group likes to shop in clean and modern surroundings but aren't that keen on busy station environments. As a result, they love the idea of 'zoning' within a station and are particularly interested in variety and interest when they are purchasing something.



“ WE NEVER FORGET THAT OUR CUSTOMERS HAVE A CHOICE. THEY DON'T HAVE TO SHOP OR DINE WITH US OR USE OUR CAR PARKS. THAT'S WHY WE CONTINUALLY FOCUS ON BEING THE BEST OF THE BEST. ”

HAMISH KIERNAN

As commercial director, Hamish manages over £1bn in revenue-generating activities across Network Rail's regions, including the retail portfolio in every managed station and all national contract relationships.

Under Hamish's expert leadership, Network Rail's retail offer is continually growing stronger, driven by his focus on understanding customer needs - both what they require now and what they're looking for in the future.

Hamish has worked in retail for his whole career, with a strong core of experience in travel and communications. This includes roles with World Duty Free, Orange (in the UK) and global roles for France Telecom and Cable & Wireless.

His open approach to leading the Network Rail commercial team encourages creative thinking, which has led to headline-grabbing projects. For example, the immersive in-station experiences at Waterloo for the cinematic releases of Ghostbusters 2 and Jurassic Park Fallen Kingdom - helping to keep the stations interesting and varied.



“ PUTTING PASSENGERS AND STATION USERS FIRST IS AT OUR CORE. WE ARE CONSTANTLY THINKING ABOUT OUR CUSTOMERS AND HOW WE CAN DEVELOP THE CHOICE OF RETAIL TO SATISFY BOTH THEIR CURRENT AND FUTURE NEEDS ”

DANIEL CHARLES

Daniel leads all aspects of Network Rail's retail offer with a focus on maximising income across over 600,000 sq ft. of prime retail space.

He has a wealth of operational experience gained from 35 years working internationally in hospitality, leisure and global travel retail.

Since re-joining Network Rail in 2016, Daniel has helped transform the retail offer and he continues to shape its future development. He oversees two teams who focus on the creation and evolution of the individual station tenant mix strategies to managing the day to day operational requirements of the business with an emphasis on the overall customer experience whilst maximising sales and income.



“ WE ALL LOVE THAT EACH STATION HAS ITS OWN UNIQUE PERSONALITY. THIS ALLOWS US TO PLACE OUR RETAILERS IN A LOCATION THAT PERFECTLY SUITS THEIR BRAND AND MEETS OUR PASSENGER NEEDS. ”

NICOLA SHEPHERD

Nicky is responsible for the category management team and the space management strategy, maximising sales and income by improving the category mix across our managed stations.

Leading a team of five category managers, which are each accountable for specific categories and regions, and a category management support assistant, who supports the team and retailers through a fair and transparent tender process.

Understanding retailers business plans is a key part of Nicky's role, and she takes time to meet with retailers and attend quarterly meetings, which drives results and improves customer satisfaction.

With more than 30 years in retail management, including both high street and luxury brands, Nicky has a wealth of hands-on experience. She routinely works with retailers to develop the right product mix and adapt their service ethic to the travel environment.



OUR REGIONS AND MANAGED STATIONS

We manage 19 stations across Great Britain. These are divided into regions, which brings our people closer to our passengers and the communities we serve, with a focus on operations to help us improve train performance.

Wales & Western

Bristol Temple Meads
London Paddington
Reading



NW & Central

Birmingham New Street
Liverpool Lime Street
London Euston
Manchester Piccadilly



Scotland

Edinburgh Waverley
Glasgow Central



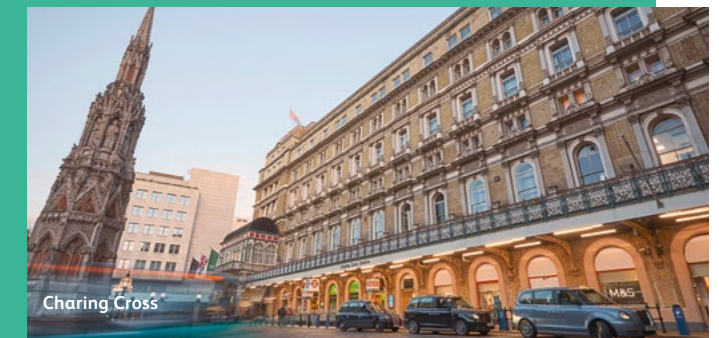
Eastern

Leeds City
London King's Cross
London Liverpool Street
St Pancras International (Lower)



Southern

Clapham Junction
Guildford
London Bridge
London Cannon Street
London Charing Cross
London Victoria and Victoria Place
London Waterloo





MAKE OUR STATIONS YOUR NEXT BRAND DESTINATION

Email us today retail@networkrail.co.uk