



Stations in Germany

Shopping, Retail, Parking, Marketing

Oliver Wittki, DB Station&Service AG

23rd Metros & Railways Technology Meeting



Knowledge and experience in station business



- Business Administration diploma, focus on Real Estate Management
- Since 15 years working for DB Station&Service AG in the fields of:
 - Lease Management
 - Center Management
 - Key Account Management
 - Development



Agenda



DB S&S AG „We build and manage Stations“

Shopping, Retail and Parking in Stations

Marketing and Events in Stations

DB Station&Service AG in the corporate group

Management of infrastructure with effect on the customer



Passenger Transport



DB Fernverkehr



DB Regio

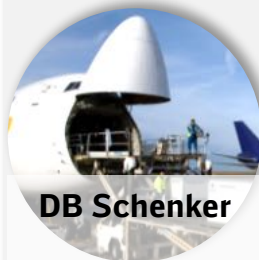


DB Arriva

Cargo Transport



DB Cargo



DB Schenker

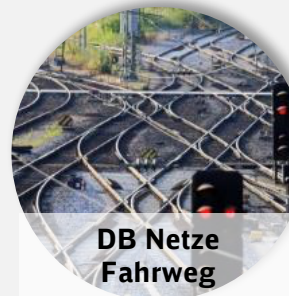
Infrastructure



DB Netze Energie



DB Station&Service AG



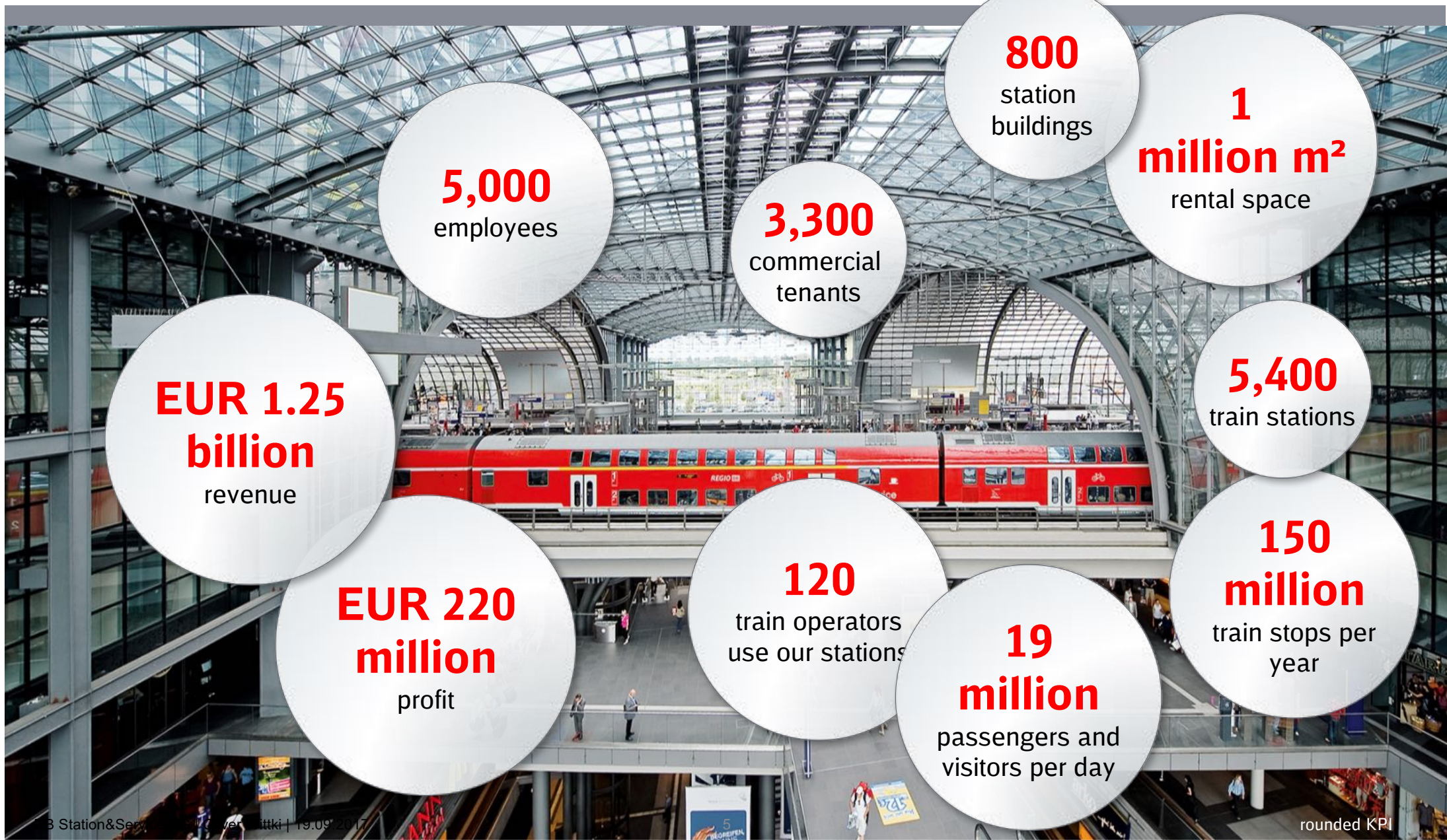
DB Netze Fahrweg

DB Station&Service AG

Train stations & station buildings



DB Station&Service AG – We build and operate train stations!



What do people associate with railways ?

Stations are named first ...

Railway stations – the flagships of Deutsche Bahn



Stations

81%



Trains

76%



Staff

43%

Agenda

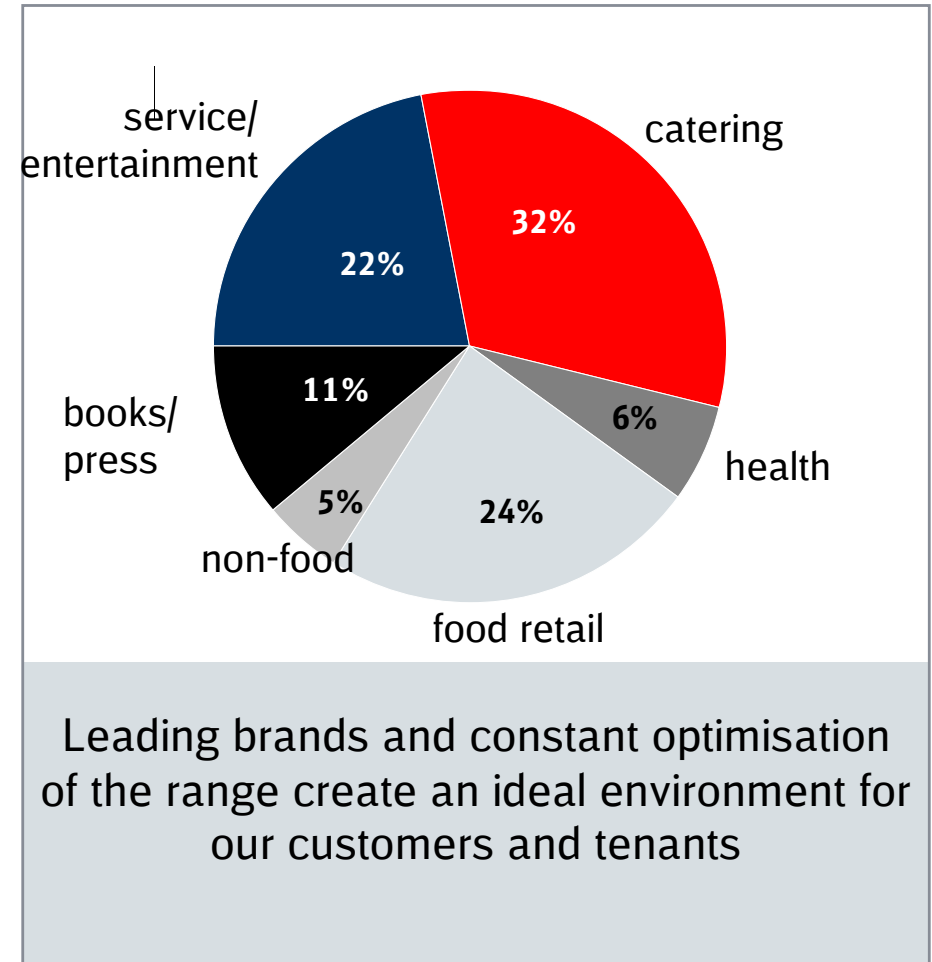


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We are one of Germany's biggest landlord for the retail business and the 3rd largest shopping center operator

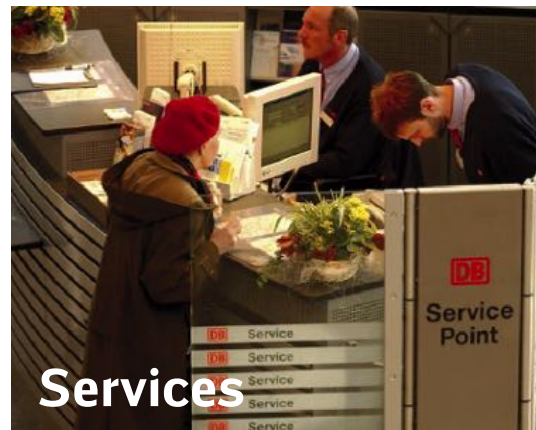
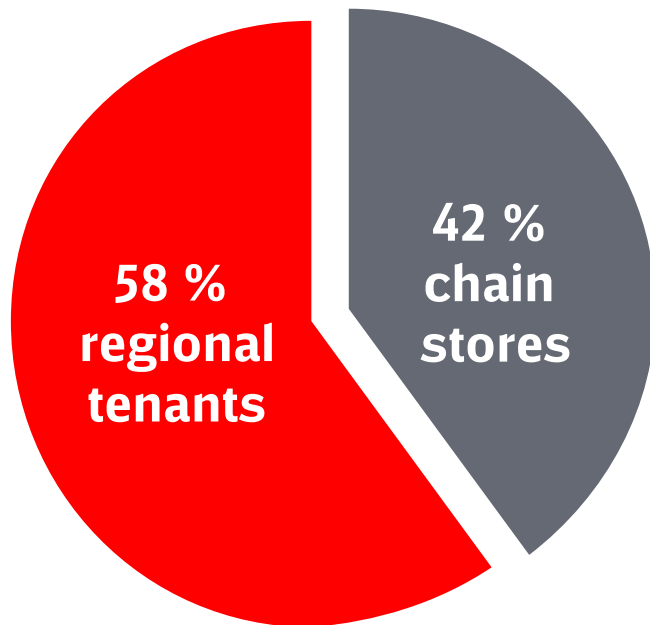


Share of rental area by sectors, 2016

Stations are interesting locations for successful retail brands and remain individual thanks to regional tenants



Proportion of chains



Germany's stations: Top shopping locations with clear advantages



Welcome to the station:

Seven days a week of customer footfall.
Seven days a week of sales.

Press Snacks

Success factor Innovative

Mix of businesses

Books Fashion & jewellery

Accessories Flowers Architecture

7 days a week

Advantage of location Events

Footfall Pro-station trend

Ambience High sales

City centre location

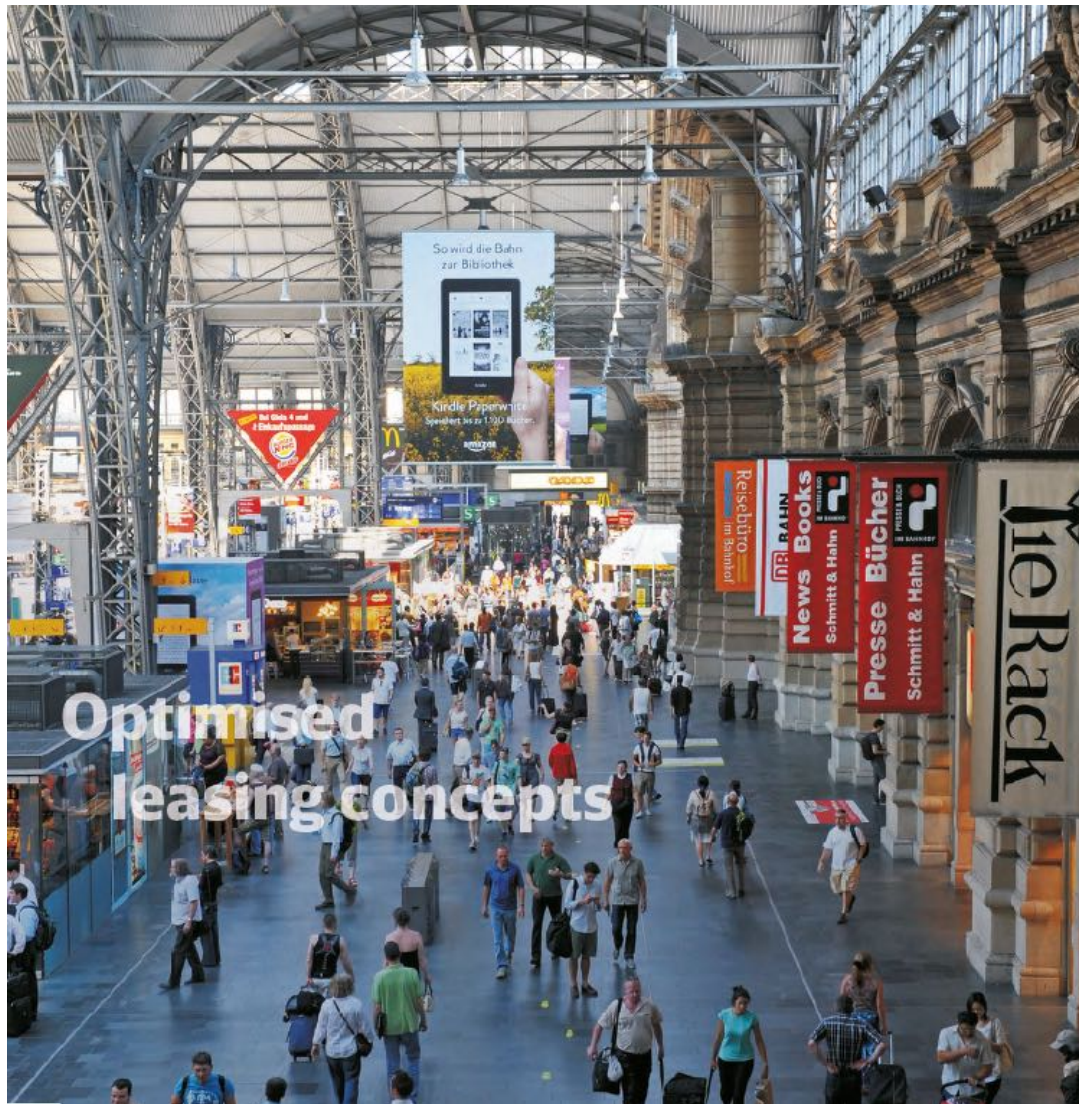
Success story

Historical **Service**

Security

TOP 10 Stations by footfall and rentable area

We have 19 million people per day in our stations



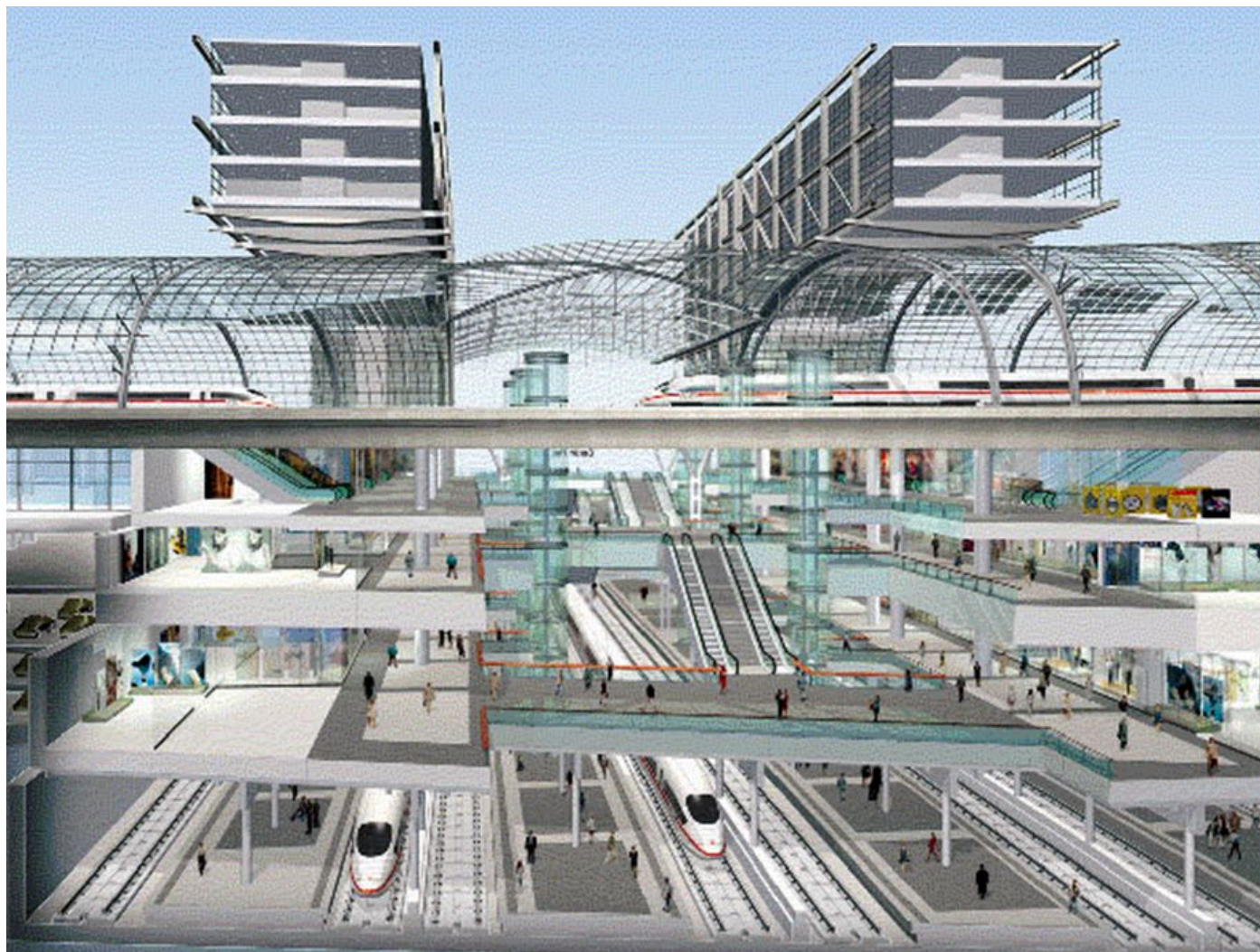
Passengers/travellers per day in thousand

1	Hamburg Hbf	530
2	Frankfurt (Main) Hbf	460
3	München Hbf	400
4	Köln Hbf	310
5	Stuttgart Hbf	300
6	Berlin Hauptbahnhof	300
7	Hannover Hbf	280
8	Düsseldorf Hbf	270
9	Berlin-Friedrichstraße	240
10	Ostkreuz	210

rentable area in thousand sqm

1	Berlin Hauptbahnhof	60
2	München Hbf	46
3	Berlin Ostbahnhof	35
4	Frankfurt (Main) Hbf	30
5	Stuttgart Hbf	22
6	Köln Hbf	20
7	Hannover Hbf	19
8	Nürnberg Hbf	17
9	Dresden Hbf	15
10	Kassel Hbf	14

Berlin central station: Europe biggest crossing stations
60,000 m2, 3 shopping levels with 80 stores / 10 floors of offices

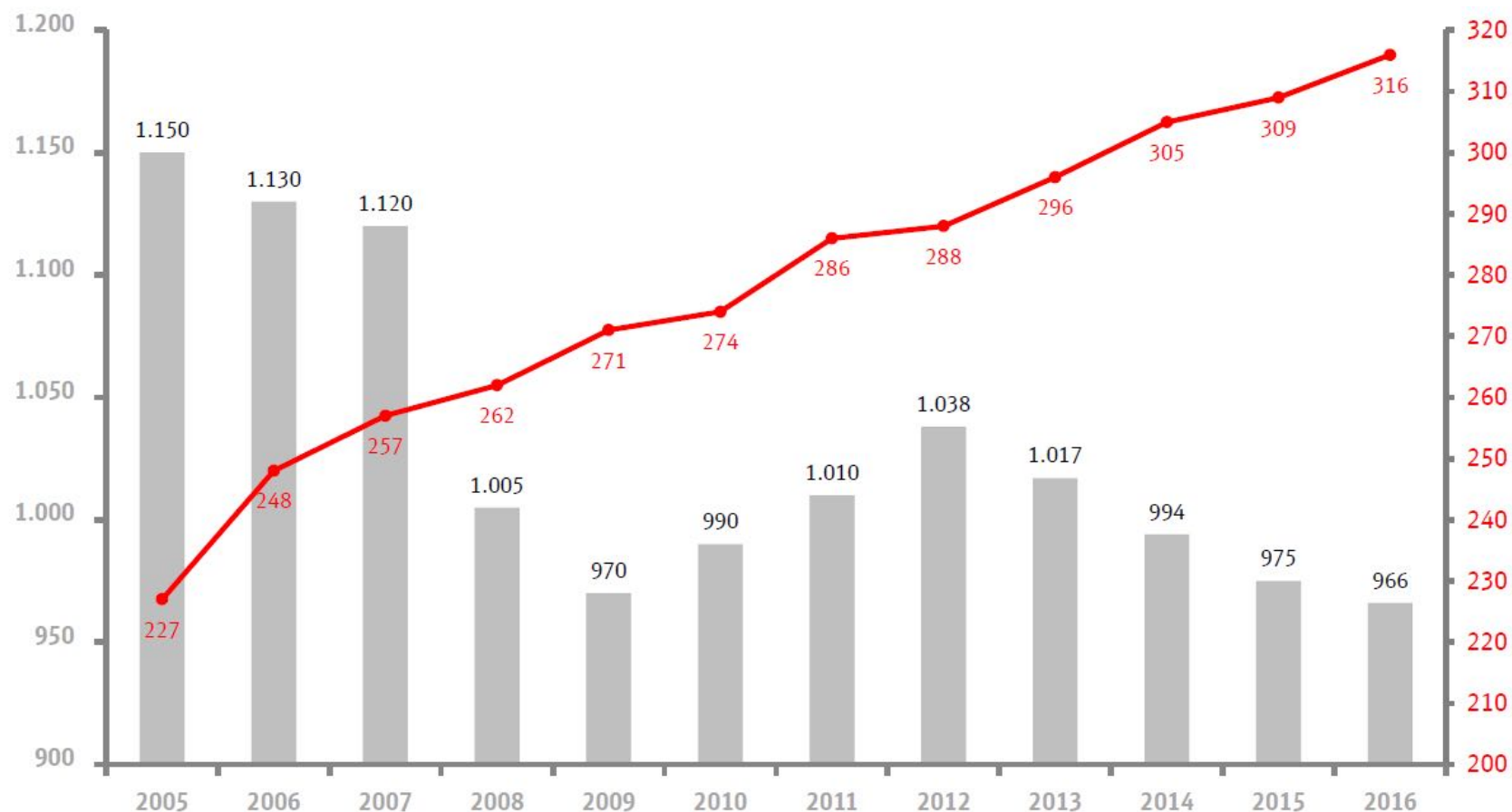


Although several station buildings have been sold, rental income increases year by year



rentable area in thousands m²

rental income in million €

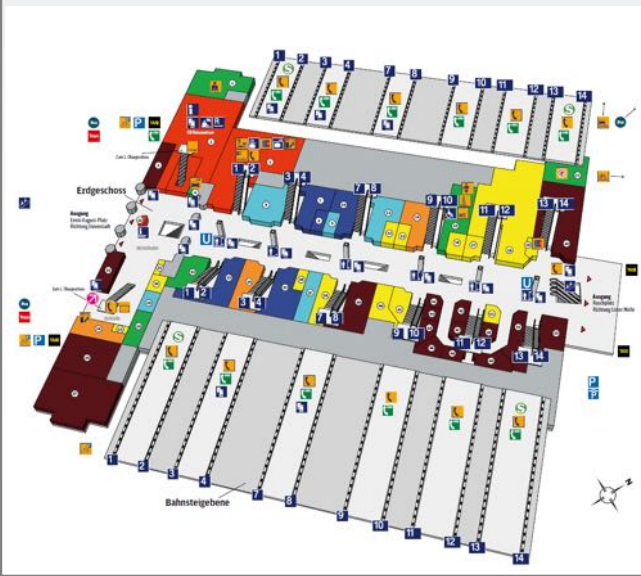


Each station with its special structures needs an individual and customised retail mix



Hannover Main Station

~ 280,000 visitors/day



Each station with its special structures needs an individual and customised retail mix



Köln Main Station

~310,000 visitors/day



DB ServiceStore founded in 2004

Franchise concept: for smaller stations



Convenience stores in stations



Mainz Römisches Theater - 150 sqm



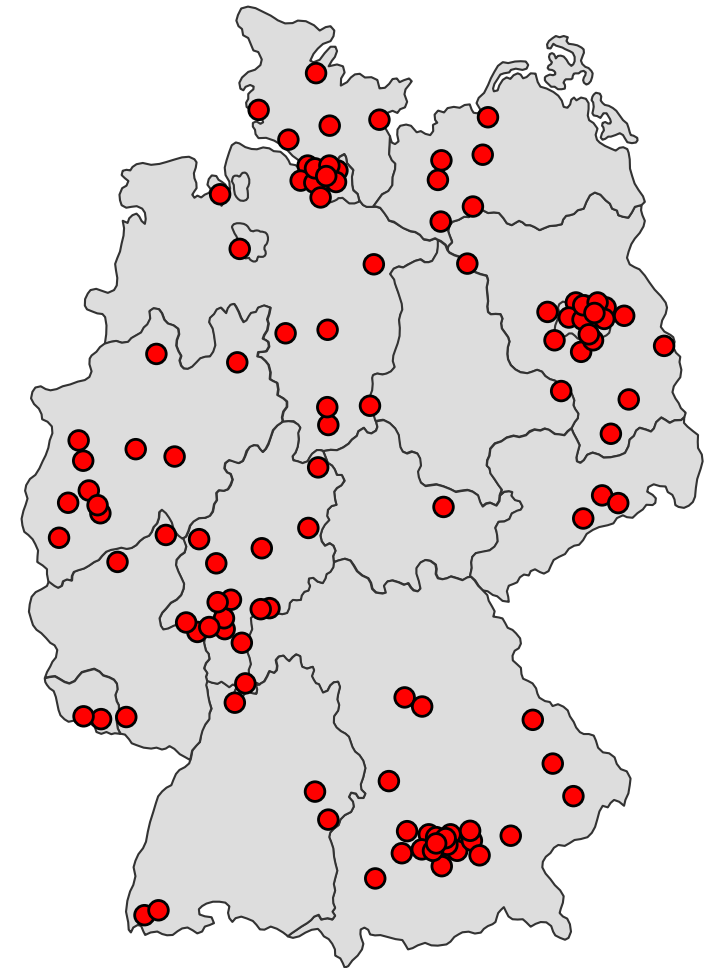
Frankfurt/Main West - 154 sqm

Facts and figures

- Size 20 to 200 sqm
- More than 150 stores

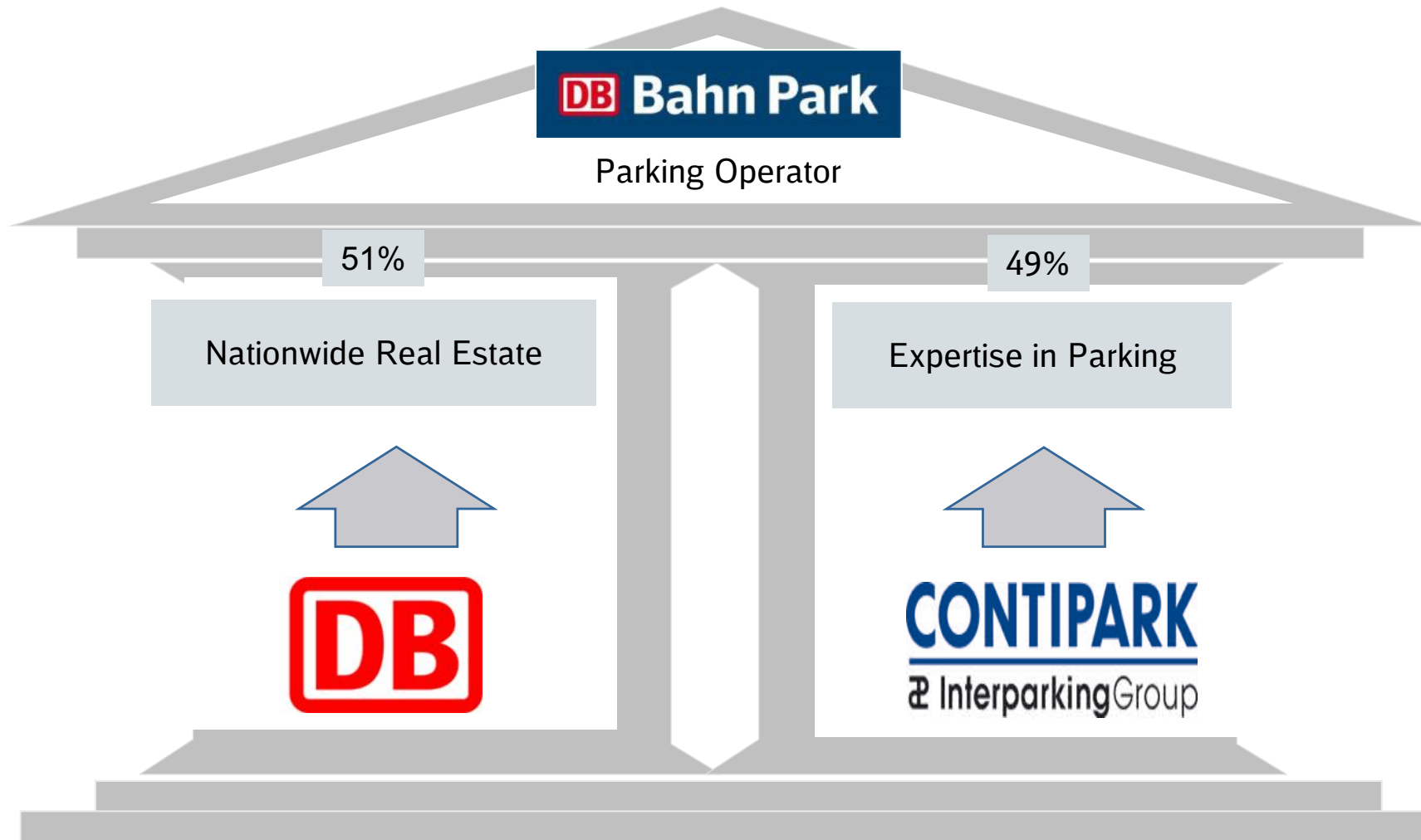
The stores sell ...

- Tickets (at selected locations)
- Coffee
- Snacks
- Commercial goods
- Tobacco
- Newspapers and magazines



DB BahnPark: Car parking operator founded in 2006

Organization – strategic forces

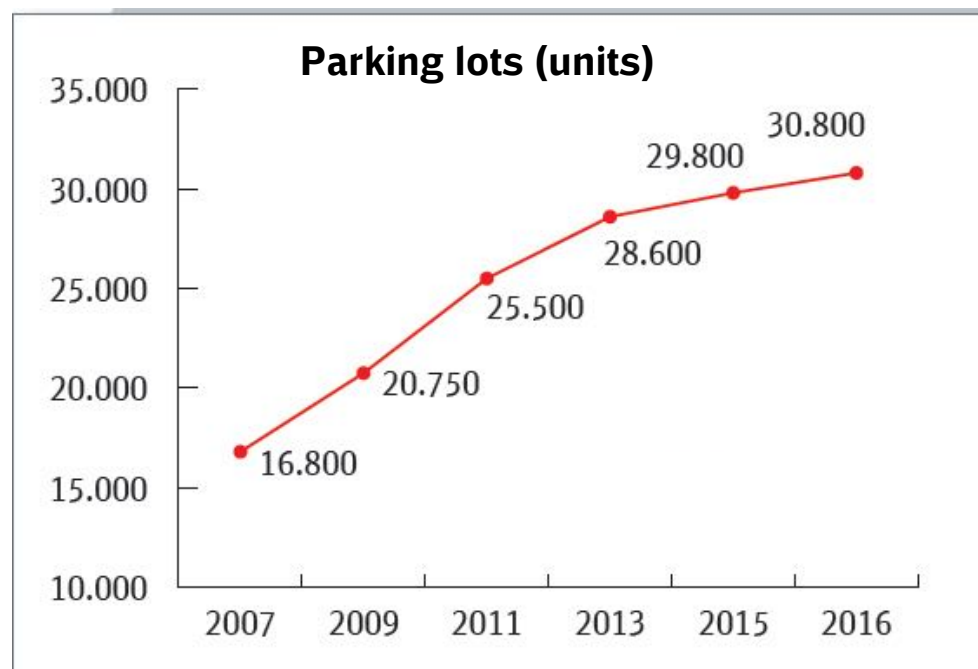
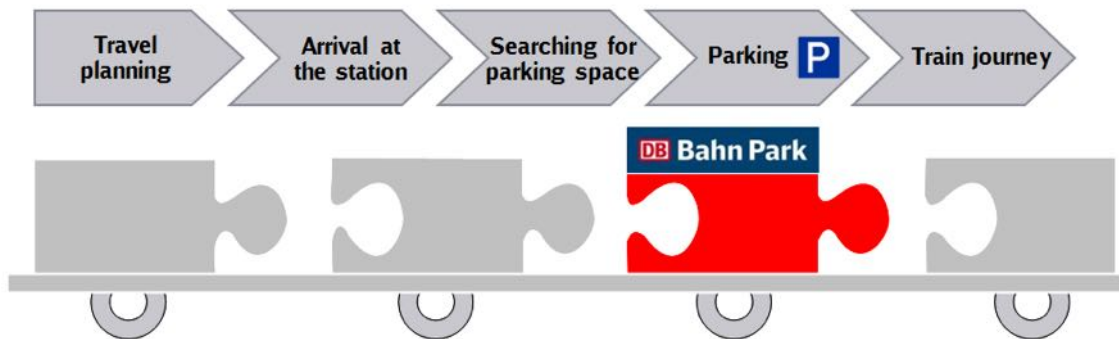


DB Bahnpark operates over 300 parking areas in Germany

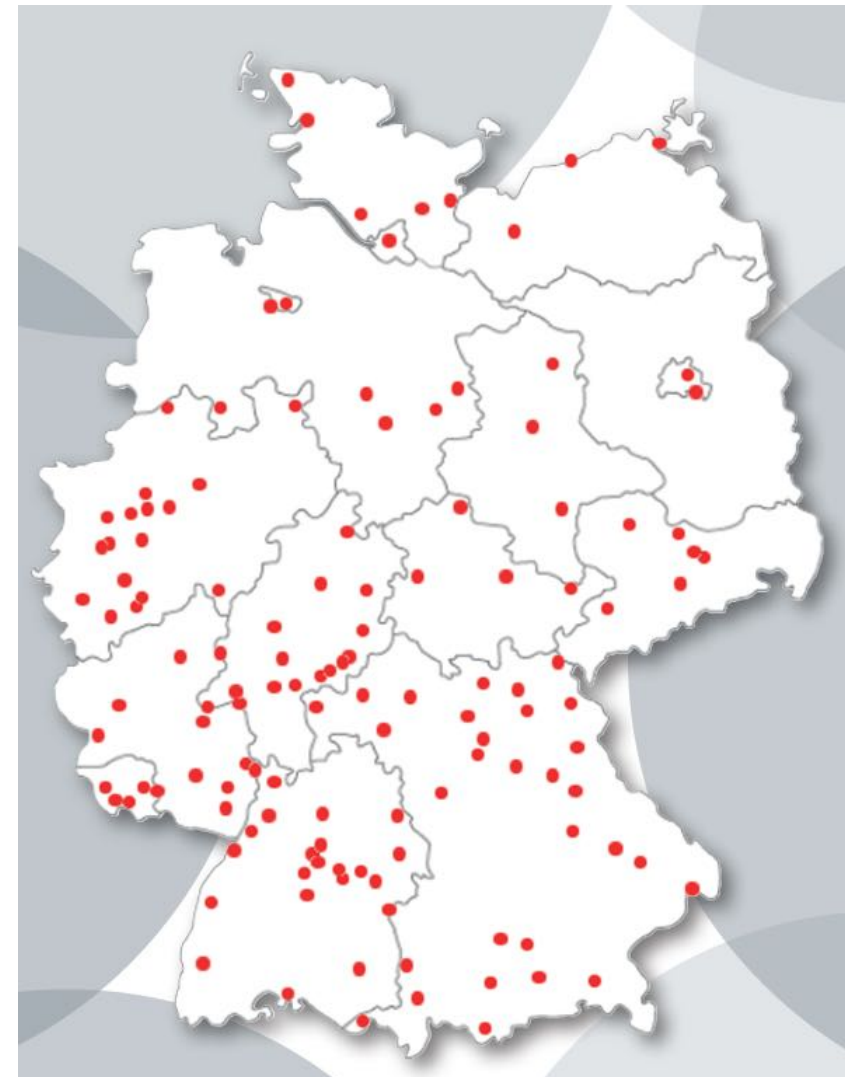
Relevant to add value on the transportation chain



Transportation Chain



Parking Areas in Germany

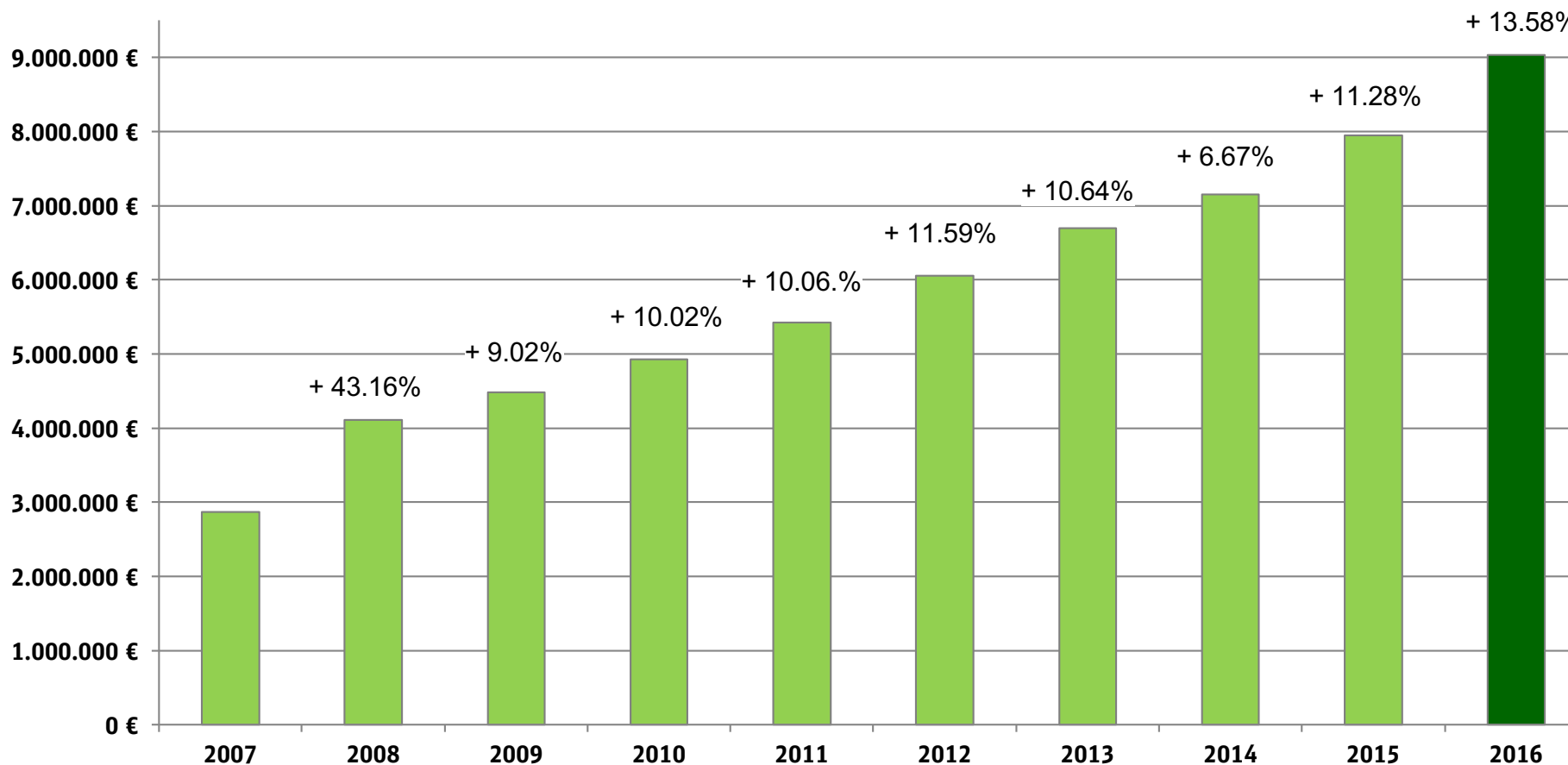


Development of EBITDA at DB BahnPark



EBITDA (€)

■ Development of EBITDA at DB BahnPark from 2006 to 2016 (year on year)



Station Food: Joint venture for Operating Food Courts founded in 2016 to maximize value added and revenues



Start Up Winner 3rd batch: getasty order online, pay cashless, pick-up your food bag in the station



team

- **Lars Holzmann**
(conception, Online-Marketing)
- **Lisa Behn**
(strategy, purchasing)
- **Svenja Thorbeck**
(social media)

product

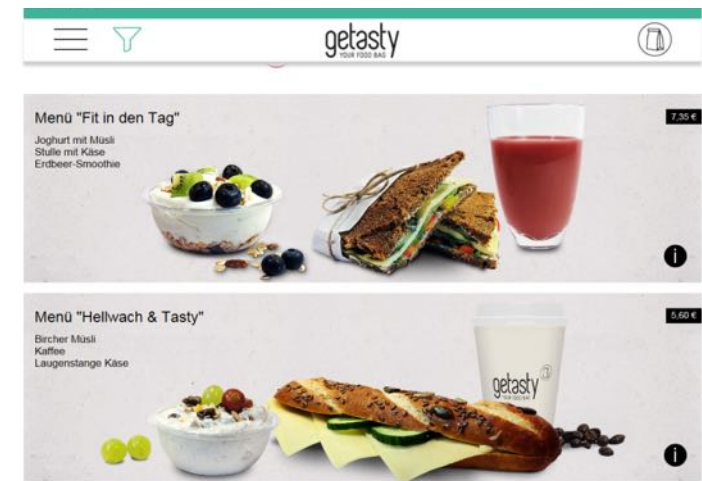
- App for ordering of food and beverage
- Cashless payment saves time
- prepared lunchbags for self pick up on the station store

targets DB Accelerator

- developing App / mobile homepage
- Optimisation of merchandise management system
- 4 weeks Pop-up Store in Berlin central station



Video Getasty



Upcoming projects will improve the service and facilities of the stations, e.g. Frankfurt central station



Stuttgart central station, including a new 4-star hotel, shops and real estate development in its surroundings



Stuttgart central station: an underground station giving place to real estate and urban development



Straßburger Platz

The new Central Station



Munich central station: new office buildings in the heart of Bavaria



Münster central station - Integration of old station building with modern architecture





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Event Management / Station Communications Marketing as a tool to increase customer experience



Event Management / Station Festivals

- all events increase the attractiveness of our stations to get new customers, improve the image and enhance the quality of the stay
- most events take place in cooperation with local tenants
- exhibitions (e.g. Faces behind the voices)
- activities during seasonal events (e.g. FIFA World Cup)
- festivals for anniversaries and openings



The Brand – Ihr Einkaufsbahnhof „Your Shopping Station“ Example: Dresden central station



IHR EINKAUFSBAHNHOF

- The Brand **Ihr Einkaufsbahnhof** represents all shopping stations in Germany
- It connects travelling with a **shopping experience**

Branded train during the German winter



10 years celebration Berlin central station





Muito obrigado pela atenção!

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