







RESEARCH

At a Glance Q2 2019
FOOTFALL REPORT
BONN

Current Key facts

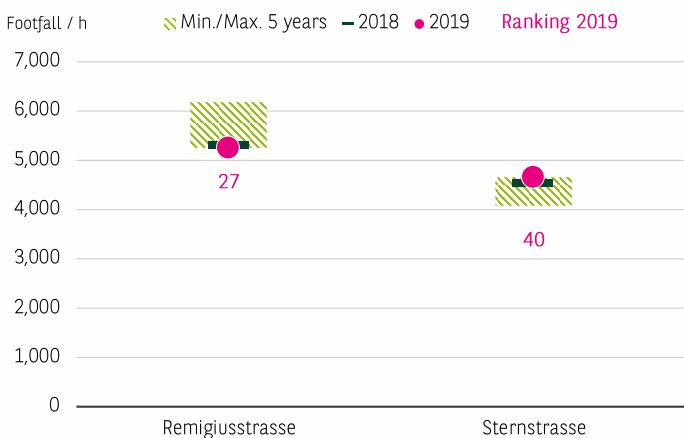
-  **325,490** Inhabitants
-  **110.5** Purchasing power index
-  **176,689** Employees
-  **115.9** Turnover index
-  **6.4%** Unemployment rate
-  **1.05** Centrality

The redesign and modernisation of the plaza in front of the station which serves as the entrance to Bonn's city centre, is taking shape. The outdated 'Bonner Loch' between station and the major shopping streets will soon be history. From the station, visitors will then pass through two new building projects designed to be both aesthetically pleasing and to enrich the retail landscape. The

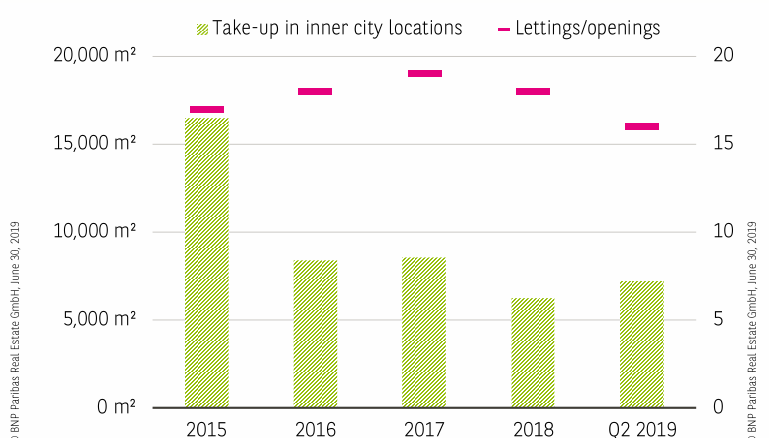
Maximilian Centre is about to be completed, and as anchor tenant, Primark will be an important generator of pedestrian traffic as from August. Urban Soul, a mixed-use property, is being built across the street and is expected to open in 2020. Irrespective of these projects, the city around Münsterplatz is a popular shopping destination.



Footfall per hour in selected A-locations

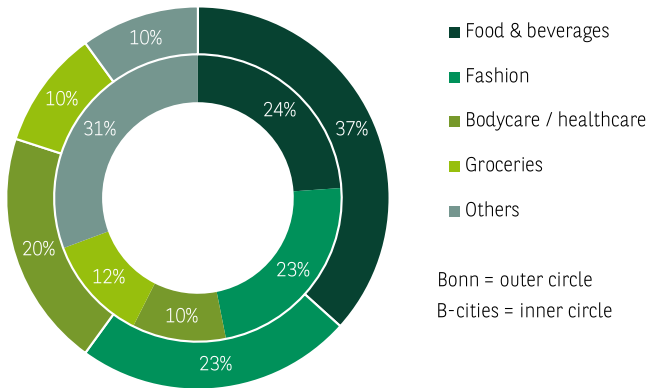


Inner city locations: take-up and lettings/openings

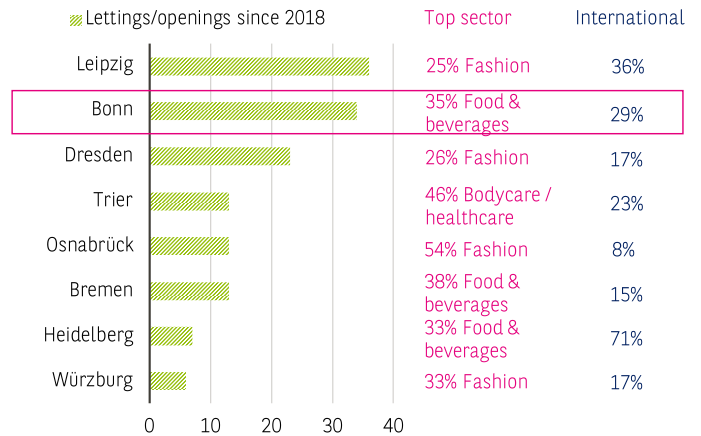


Day of count: 15.06.2019 | Positioning within the nationwide ranking - 95 counting locations respectively 118 top rents in 27 cities
Source: BBE Handelsberatung GmbH | Key facts: Residents and community register, Federal Employment Agency, GfK Geomarketing GmbH

Lettings/openings by sector since 2016



City ranking of lettings/openings since 2018

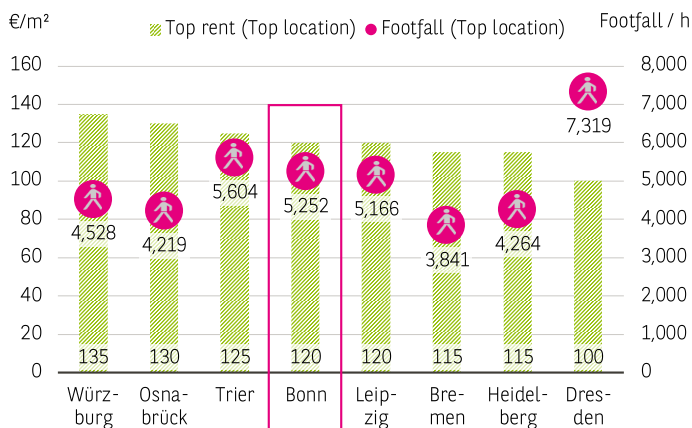


PLEASING VISITOR NUMBERS AND STRONG FOOD AND DRINK SECTOR

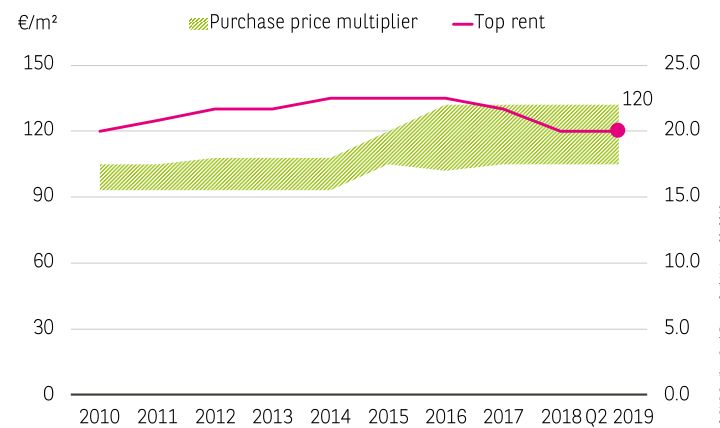
The two most important and popular locations (Remigiusstraße and Sternstraße) are pleasingly stable in terms of pedestrian traffic. In Remigiusstraße, the modest downward trend of recent years was brought to a halt, with a scarcely notable decrease (-1%) to approximately 5,250 individuals and secured Bonn's top location place 27 in the country wide comparison. In Sternstraße pedestrian frequency once again even recorded a rise (+3%) and ranked 40th with 4,650 visitors. Rents in both main locations haven't moved in the past 12 months and are each at the previous year's level with 120 €/m². However, no new rentals have yet been observed in either street, although demand for space remains high. No suitable shops have yet come onto the market, with the result that the usual fluctuation has so far failed to materialise. Nevertheless, this could change in the not-too-distant future, as premium outlet chain Saks OFF 5TH has closed its branch in Remigiusstraße. Karstadt Sports, is in talks to become the successor and is expected to take over the premises in Bonn and many other locations. Retailers are currently still cautious in Poststraße and are waiting for developments in the

station area. Former national football player Lukas Podolski has opened his ice cream parlour Ice Cream United in a former Vodafone shop. Urban Soul has attracted deli concept Sander thereby enriching the culinary selection near the railway station and contributing to the great importance of food and drink business. However, there are nuances to consider, as two factors play an important role. Firstly, restaurant owners in general are increasingly taking over free space in city locations with L'Osteria replacing former furniture store Mambo (In der Sürst), and a Tex-Mex establishment following Café Bottler (Vivatgasse), which closed in October. An expansive catering industry can be observed in many cities and Bonn is no exception. This sector is, as a result, strongly represented, especially in the passage of the Maximilian Centre, where a new food boulevard has been created. Recent additions are Le Crobag and dean&david. Secondly however, other sectors are also making a difference in the Bonn retail scene, with the running store Absolute Run (Bonngasse) being particularly noteworthy. Sport 2000 is starting a pilot project there and will not only be selling running shoes and clothing, but would also like to use the store to attract the running community through running meets, lectures and events.

Top rent and footfall in selected B-cities



Development of top rent and purchase price multiplier



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