









RESEARCH

At a Glance **Q2 2019**

**FOOTFALL REPORT
LEIPZIG**

Current Key facts

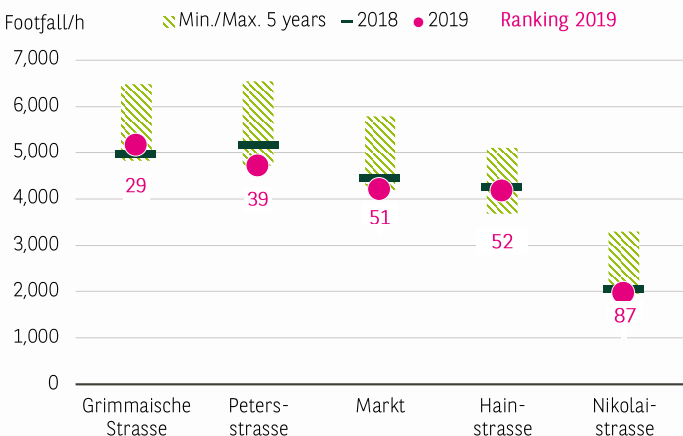
-  **581,980** Inhabitants
-  **87.4** Purchasing power index
-  **269,009** Employees
-  **93.4** Turnover index
-  **6.7%** Unemployment rate
-  **1.07** Centrality

The city, which for many citizens is the unofficial capital of Saxony, has undergone a remarkable development in recent years. An increase in population of 12% in the last 5 years (comparatively the increase in Berlin is just 7%) has allowed Leipzig to overtake its perpetual rival, and actual state capital, Dresden, simultaneously accompanied by a rise in employment of more

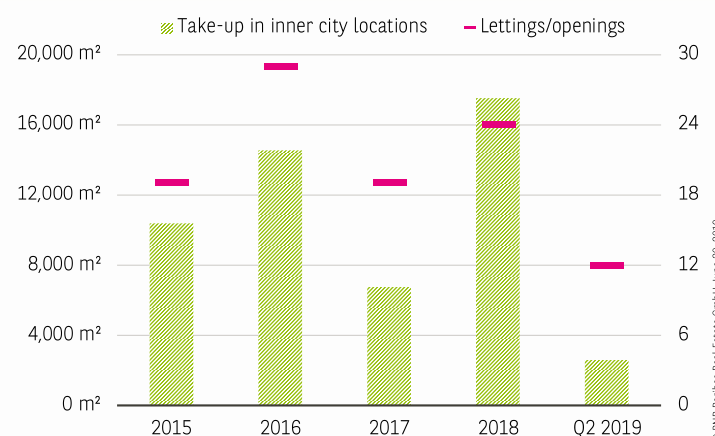
than 17% and a good quarter more overnight guests. All these people need to be provided for and represent additional potential for Leipzig's retail trade. Accordingly, the demand from retailers is high. This trade fair city is also very popular for its food and drink concepts and profits from sufficient availability of space compared to other locations.



Footfall per hour in selected A-locations

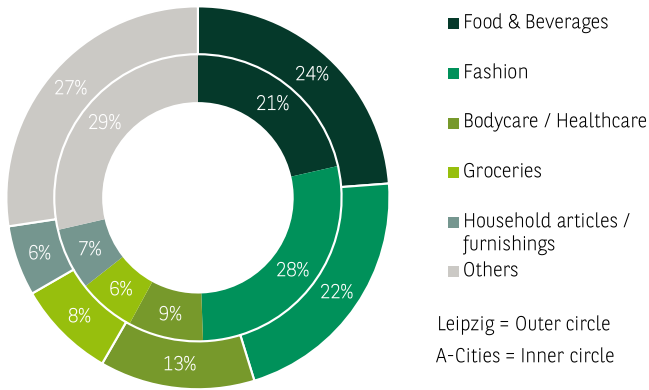


Inner city locations: take-up and lettings/openings

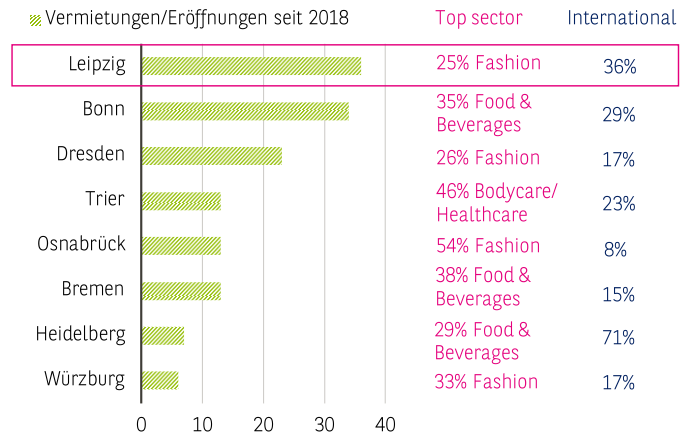


Day of count: 15.06.2019 | Positioning within the nationwide ranking - 95 counting locations respectively 118 top rents in 27 cities
 Source: BBE Handelsberatung GmbH | Key facts: Residents and community register, Federal Employment Agency, GfK Geomarketing GmbH

Lettings/openings by sector since 2016



City ranking of lettings/openings since 2018

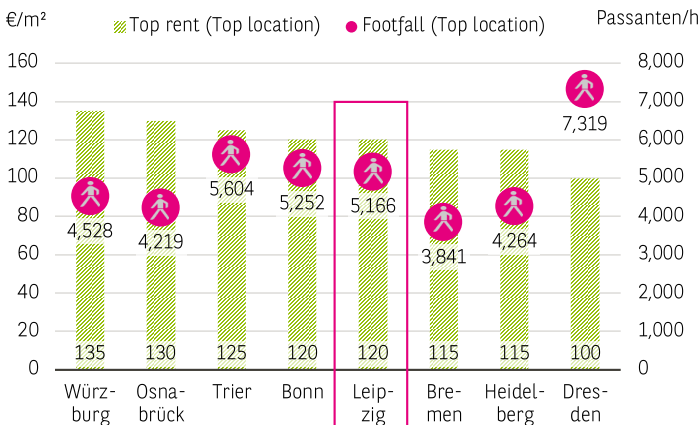


GRIMMAISCHE STRASSE TOP THIRD OF LOCATIONS

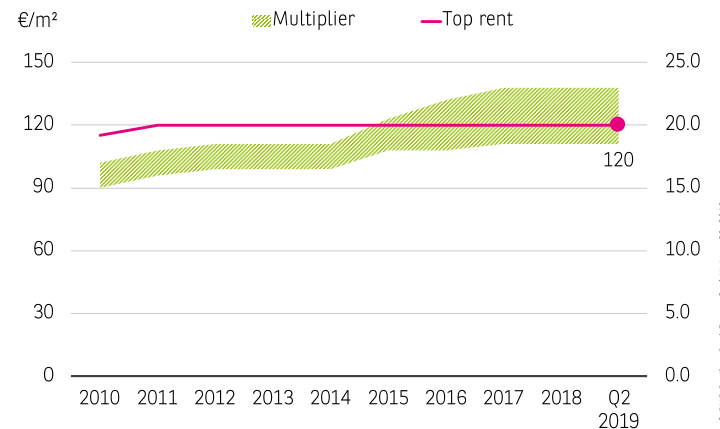
In this year's footfall count, Grimmaische Straße with almost 5,200 pedestrians per hour superseded Petersstraße (a good 4,700 pedestrians per hour) as the location with the highest traffic. This puts the first location in the top third of the 95 nationwide counting locations. Broadly, customer flows are well distributed across A-locations, which is impressively demonstrated by two further streets with more than 4,000 pedestrians each (Hainstraße and Markt, both around 4,200). It remains to be seen whether this change at the top will be permanent or merely temporary and due to the closure of Karstadt in Petersstraße. Pedestrian turnout could also be boosted by the completion of the long-term construction site at Burgplatz and the extension of Petersbogens, which was inaugurated at the end of June. Zero, one of the Karstadt subtenants displaced by the closure, has also found shelter in the latter. Thanks to the comparatively relaxed supply situation, idee.Creativmarkt craft shop chain has already moved into new premises in Hainspitze. Alongside buoyant demand, this forms the basis for brisk market activity. With well over 30 contracts

concluded in city locations since 2018, Leipzig is top of the league of B-locations. Just how stable demand is, can also be seen from the rental level. Unlike most other cities, Leipzig's top rents are extremely stable: For several years now, it has been constant at 120 €/m² and is found in two high-frequency locations, Grimmaische Strasse and Petersstrasse. Among the new arrivals in these locations are the US fashion chain Urban Outfitters, the shoe retailer Ecco (both Petersstraße) and the H&M subsidiary COS (Grimmaische Straße). However, there is a certain price difference to other streets: Markt peaks at 90 €/m² and 70 €/m² in Hainstrasse. The latter has two new players in the health segment with Smarteyes (400 m²) and Apollo contact lenses (25 m²). Nikolaistraße at 45 €/m² and Neumarkt at 30 €/m² are comparatively inexpensive. This is also the only street that recorded a negative result with a drop of 5 €/m². However, the basic popularity of this location is evidenced by the tenancies of outdoor outfitter Globetrotter, which has established its city store here, and the menswear provider Mettino Fashion Lounge, which has opened approximately 170 m².

Top rent and footfall in selected cities



Development of top rent and purchase price multiplier



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