



At a Glance **Q2 2019**

# FOOTFALL REPORT MAINZ

## Current Key facts



215,110 Inhabitants



112,706 Employees



5.5% Unemployment rate



106.3 Purchasing power index



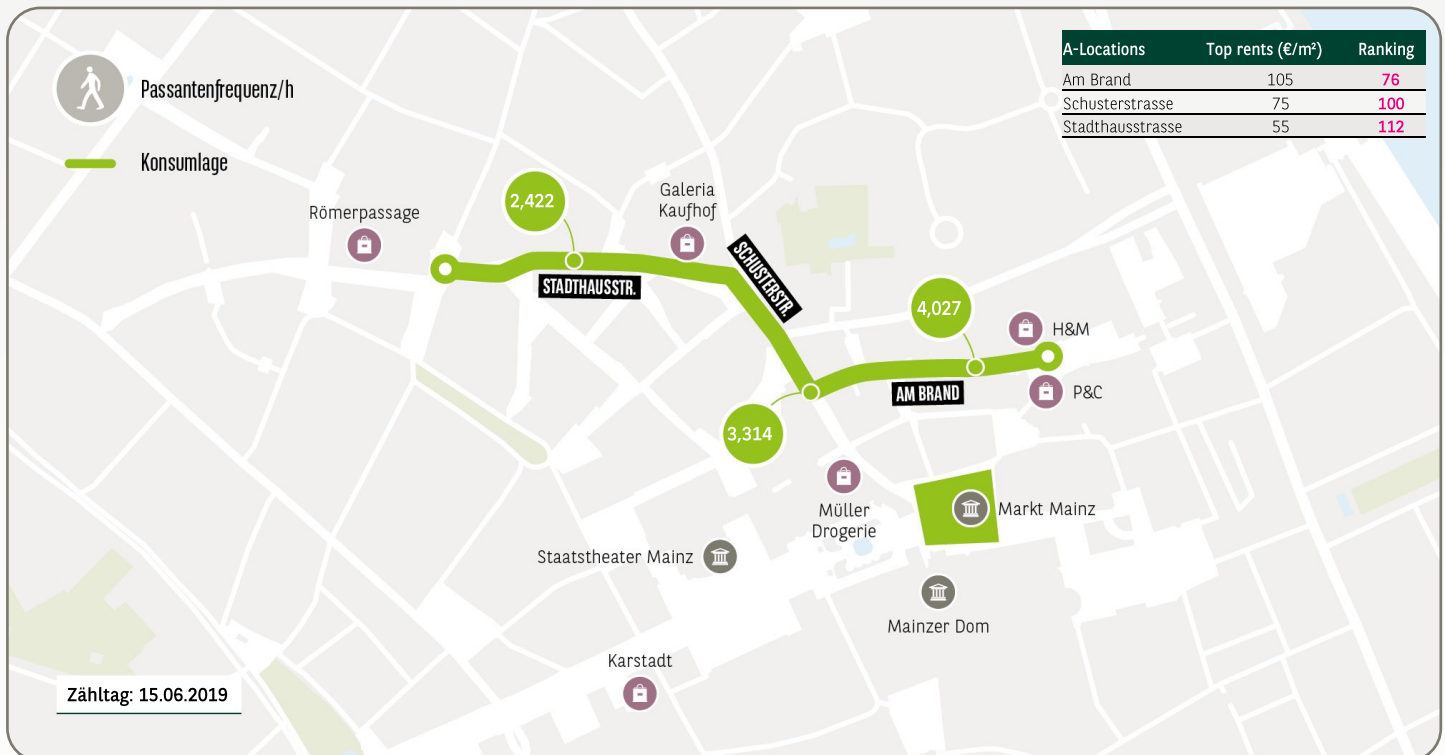
115.5 Turnover index



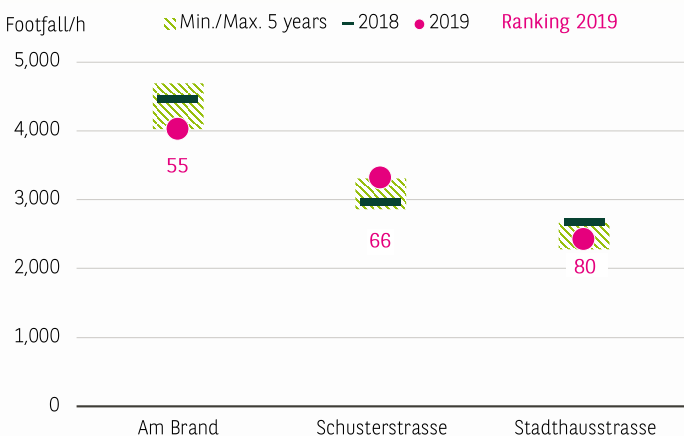
1.09 Centrality

The carnival heartland on the Rhine has always enjoyed great popularity, reflected in a population that has been rising for years. It is not only the carnival that acts as a visitor magnet, but also the attractive promenades. With its varied districts and specialist shops, downtown shopping locations offer a broad assortment to satisfy the needs of different consumers. However, Mainz still

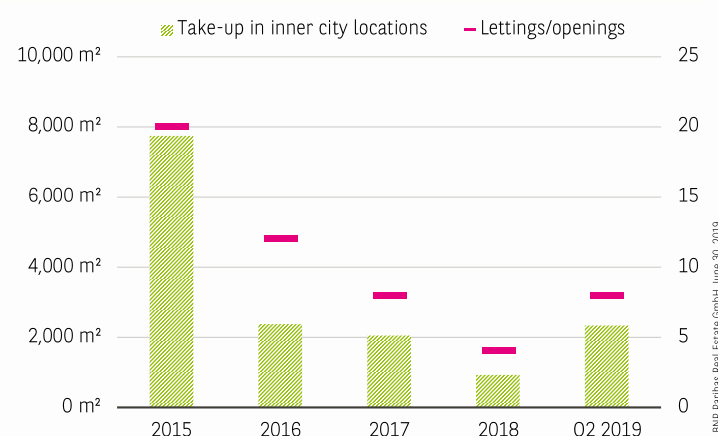
cannot get its centrality trending upwards, which, according to a survey results, is primarily attributable to transport infrastructure. In order to attract more customers from the surrounding area the city wants to implement new ideas to improve connections, currently considered sub-optimal.



## Footfall per hour in selected A-locations



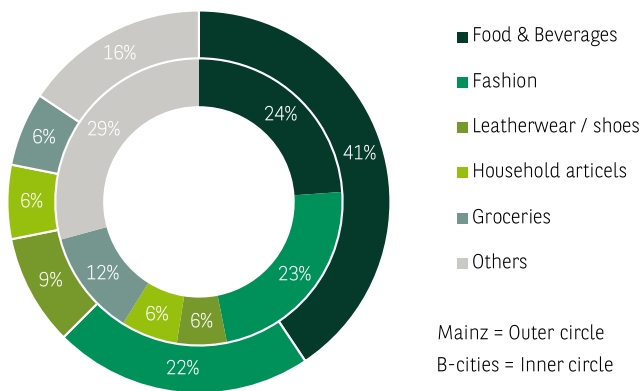
## Inner city locations: take-up and lettings/openings



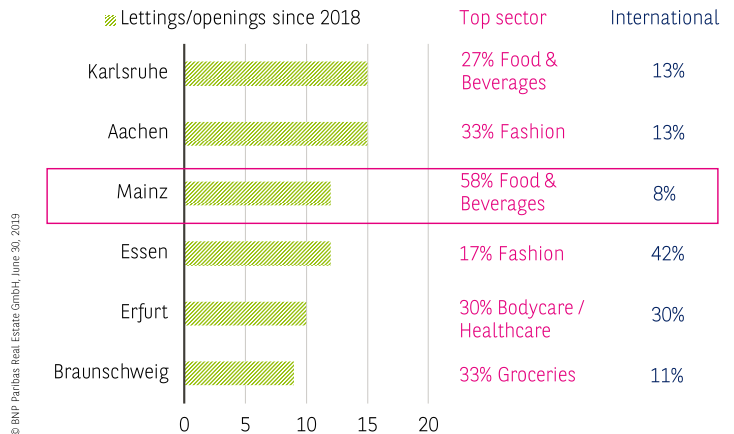
Day of count: 15.06.2019 | Positioning within the nationwide ranking - 95 counting locations respectively 118 top rents in 27 cities

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



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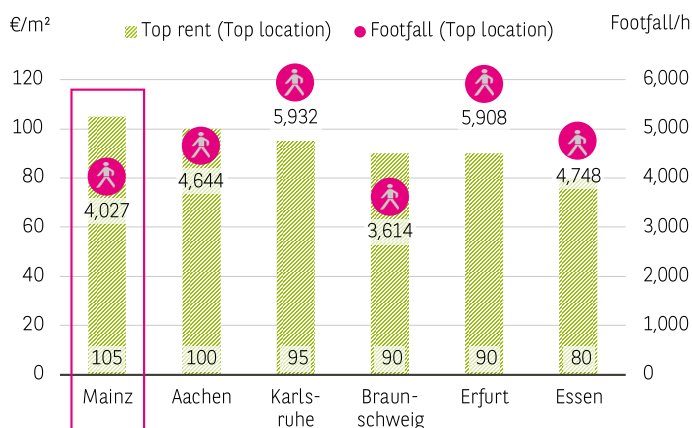
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## TRADITIONAL RETAIL LOCATION IN TRANSITION

The clothing store "Uhlig am Dom" was a company that shaped the Mainz shopping tradition for decades yet closed its doors at the beginning of the year after 99 years of business. But in a good example of how tradition and change can be combined in retailing, lingerie manufacturer Mey took over the shop and brought a new concept to the cathedral, but retained the name of the traditional company. The city also wishes to manage such transition into the modern age. There are strong political efforts to continue developing inner-city shopping locations whilst preserving the retail flair of past decades. The idea and focus here is on upgrading Ludwigsstraße, combining shopping, fun and culture. In this spirit, there is a planned conversion of the Karstadt building, to use the space for pop-up stores, restaurants, a hotel and a club. In addition to this future project, construction work on Großen Langgasse is still in full swing, and this shopping street is expected to be completed by the end of 2019. The momentum of change is also arousing the interest of retailers, which is reflected in a number of lettings/openings.

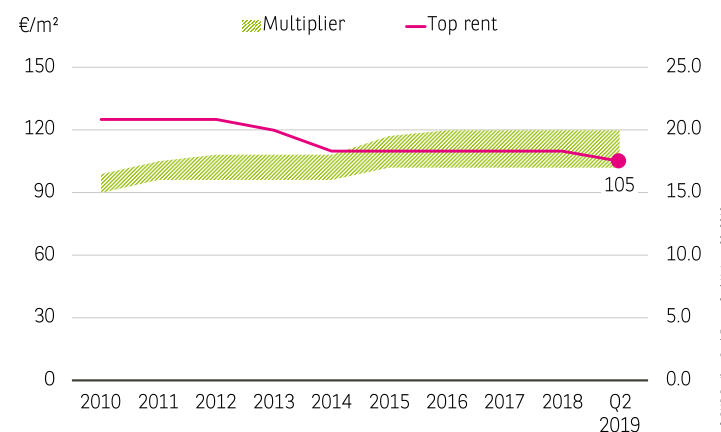
Abele-Optik was able to secure an area in the A location of Stadthausstraße. City centre vitality is also evident in the growing number of restaurants and cafés. El Burro Mexican Kitchen, Café Wood's, Robert's Pita & Grill, Willems Altstadtcafé and The Old Man and the Sea all opened in the first half of the year. In general, demand can be described as good, especially in the shopping streets of Am Brand and Römerpassage, but demand for large areas is currently confronted with a lack of supply. Despite high demand, peak rents have fallen slightly since the end of 2018 (105 €/m²), which is attributable in particular to the increased price sensitivity of potential demanders. Footfall in the state capital continues to be encouraging. Compared to other shopping streets at locations with a population of between 100,000 and 250,000, Am Brand is above average with 4,100 pedestrians per hour. With the aforementioned urban development activities behind it, constant demand and high footfall in top locations, Mainz's inner-city retail trade appears to be well prepared for the e-commerce age.

## Top rent and footfall in selected B-cities



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## Development of top rent and purchase price multiplier



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Imprint Publisher and copyright: BNP Paribas Real Estate GmbH | Prepared by: BNP Paribas Real Estate Consult GmbH | Status: June 30, 2019

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