At a Glance Q2 2016

FOOTFALL REPORT WIESBADEN

The second-largest city in the Rhine-Main region, Wiesbaden is on a remarkable growth trajectory, fuelled by rising population and employment figures. As a city of culture, it is also registering increasing numbers of overnight stays. One of the beneficiaries of these developments is the retail trade, as reflected by very good purchasing power and turnover index figures. The attractive retail scene spreads over numerous small streets, making for a memorable shopping experience.

Pedestrian frequency per hour in selected locations

<table>
<thead>
<tr>
<th>Location</th>
<th>Counting Point</th>
<th>Rank*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kirchgasse</td>
<td>6,498</td>
<td>24</td>
</tr>
<tr>
<td>Marktstrasse</td>
<td>2,072</td>
<td>89</td>
</tr>
</tbody>
</table>

Top rents in selected locations

<table>
<thead>
<tr>
<th>Location</th>
<th>Rent (€/m²)</th>
<th>Rank*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kirchgasse</td>
<td>140</td>
<td>43</td>
</tr>
<tr>
<td>Marktstrasse</td>
<td>75</td>
<td>102</td>
</tr>
<tr>
<td>Langgasse</td>
<td>55</td>
<td>111</td>
</tr>
<tr>
<td>Wilhelmstrasse</td>
<td>55</td>
<td>111</td>
</tr>
</tbody>
</table>

Day of count: 04.06.2016 | Weather: 21°C
Special factors: None

Source: GfK
**KIRCHGASSE REMAINS STRONGEST LOCATION**

With nearly 6,500 pedestrians an hour, Kirchgasse just failed to match last year’s very good footfall result. Nevertheless, Wiesbaden’s prime location still ranks 24th in the table of Germany’s busiest shopping streets. Towards the northward extension of Kirchgasse, Langgasse, which is also one of the main streets, the footfall count progressively drops off. In the adjoining consumer-oriented Marktstrasse, pedestrian traffic flow is once again just on 2,100 visitors an hour. This earns the precinct 89th place in the national table, marginally down on last year’s performance. Wiesbaden’s A-precincts also include upmarket Wilhelmstrasse, with its range of quality brands. In the A-locations, the chain-store ratio is moderately higher than last year on Langgasse and Marktstrasse, on the consumer-oriented main shopping street Kirchgasse, it currently stands at 88%. How downtown shopping mall Lilien-Carré develops remains to be seen.

**RENTS LARGELY STABLE**

Demand for space in Wiesbaden continues to be good but increasingly focuses on the Kirchgasse area up to Mauritiusplatz, where Langgasse begins. The strongest demand comes from clothing brands and catering concepts. Italian luxury fashion label Armani Collezioni, for example, has secured premises at the end of Burgstrasse. At present, a growing number of very small premises are coming onto the market, whose limited sales areas make onward letting difficult. Kirchgasse continues to command a prime rent of 140 €/m²; the highest rent on Marktstrasse is unchanged at 75 €/m². In the first half of 2016, fashion concept COS secured a 500 m² store at the beginning of Langgasse, which will further strengthen this location. Even so, the top rent registered on Langgasse – 55 €/m² – is 5 € lower than at the start of the year.