IMPACT OF THE COVID-19 PANDEMIC ON GERMAN INNER CITIES

Retailers, restaurants, and the cultural and real estate sectors under pressure

Study series Future Cities 1

SUMMARY

FACTS

1. The effects of COVID-19 create acute challenges for inner-city areas while at the same time adding further momentum to the structural changes of recent years

2. It is unlikely that visitor frequency in inner cities will ever fully recover to the pre-COVID-19 level

3. Changing habits and requirements call for new city centre concepts

4. Improving the quality of stay in inner-city areas, changing the use of space and a more active management of vacant spaces are key

5. Comprehensive revitalisation of inner-city areas is only possible through cooperation: this is the challenge for city marketing and development bodies, restaurants, retailers, property owners, and other market participants

APPROACHES

- Prevent increase in vacancy rates
- Increase the attractiveness as a business location
- Improve regional purchasing power
- Revitalise inner-city areas in general
- Raise visitor frequency in inner cities

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The client base comprises SMEs as well as corporations with international activities. FIT-Andersch is part of the global FTI Consulting Group (NYSE: FCN) with more than 5,500 employees.

1 SITUATION AT THE OUTSET: ECOSYSTEM INNER CITY

German inner-city areas are facing structural changes, and COVID-19 has added fuel to this development. However, not all inner cities are equally affected: changing consumer behaviour, the collapse of international leisure and business tourism as well as an acute de-urbanization trend hit the major German cities particularly hard. The general call to work from home, high rental prices, and rising vacancy rates reduce the attractiveness of German (inner) cities.

The COVID-19 pandemic has increased the anxieties of retailers and chain stores in particular as more customers than ever migrate to the Internet and brick and mortar stores are forced to close temporarily during lockdowns. Contact and travel restrictions also affect restaurant, and hotel operators. This has severe consequences: even major, vertical retailers such as Zara, H&M, and C&A are starting to pull out of A locations, while some outlets of Galeria Karstadt Kaufhof and Runners Point have already been closed for good. Many smaller retailers are also forced to withdraw because of acute liquidity shortages. Rising vacancy rates further lower the appeal of the cityscape – therefore it is now paramount to actively counteract this downward spiral. In addition, lockdown measures lead to asymmetrical behaviour patters in brick-and-mortar retail. Even though consumer solidarity was actively called for, especially at the beginning of the pandemic (#supportyourlocal), the big online market places are benefitting massively from the crisis. The adaption rate of online shopping increased rapidly and will continue to dominate consumer behaviour in Germany in the future.

Sustainable effect

Online shopping will play an even bigger role in shopping behaviour than before

Taking this trend as a basis, the following questions arise:
How resilient are inner cities in Germany in the Corona virus crisis?
What are the acute challenges they currently have to face?
What role will the inner cities play in the future?
What can those responsible do in the short, medium and long term in order to develop their cities in line with future trends?

In this study, we identified 52 German cities based on 19 factors in a scoring model with regard to their macro-economic strength as well as resilience to short-term shocks and allocated them to seven clusters. This is followed by a description of short, medium and long-term measures to map out a sustainable, successful inner city concept for the future.

ECOSYSTEM INNER CITY

Retail

For many years, brick and mortar store have been at the core of German inner cities. Declining visitor frequency, multi-channelling, and new spatial concepts have a major impact on retailers and contribute to structural change. Brick-and-mortar retailers have to adapt to changing consumer behaviour and implement pro-active measures such as adjusting their choice of location, introducing new store concepts, or using digital offers more effectively.

Restaurants

Restaurants play a major role when visiting inner cities. In recent years, real estate operators have increasingly adopted the new logic of "food is the new retail". However, restaurants are also hit very hard by the COVID-19 pandemic. The new lockdown has again boosted delivery services and convenience offers, while home cooking is also making a comeback and is spurred by food box concepts. Understanding and adequately assessing new consumer behaviour patterns becomes all the more important for developing a targeted response strategy.

City marketing and development

In order to make inner cities an attractive location for retailers and restaurant operators for the long term, the way (and proportion) how space is used and the cooperation with relevant actors in inner-city areas need to be analysed and discussed. The following sub-study will focus in particular on the short- and medium-term measures for an urban development from which all inner city stakeholders can benefit.

Question

Future use of vacant office and commercial properties

Real estate sector

The development of inner cities has a major impact on the real estate sector, while changes in the real estate sector also have an effect on the attractiveness of inner-city locations for retailers. Vacancy rates and the development of rental prices, for instance, are closely linked to the attractiveness of inner cities. The digitalisation trend not only changes the retail sector but also takes away the role of the office as a communication hub – people work more homes, a trend that is sustainably driven by COVID-19. More and more employees ask themselves whether or not they really need to live close to the office. They consider moving to the outskirts where prices are lower and commute time can be reduced.

Cultural institutions

Cultural institutions are another important motivation for visiting the inner city. A wide range of offers attracts people from different interest and age groups to the city centres. The resulting visitor streams lead to higher revenue potential for retailers, while the discontinuation interrupts this flow of income. After the COVID-19 pandemic is over, however, this correlation offers opportunities for stepping up the collaboration in order to secure the future of the inner cities.

The direct effects of the COVID-19 pandemic and structural market shifts among the stakeholders in the ecosystem of inner cities will be addressed in more detail by following parts of the study series.

2 URGENT CHALLENGES

Increasing loss of solidarity jeopardises inner-city retailers

With the beginning of the first lockdown in the course of the COVID-19 pandemic, numerous solidarity initiatives flourished to support over-the-counter retailers. A trend to shop everyday items locally emerged and became increasingly popular. Buying regional products and consumer awareness were promoted, especially on social media channels. At the same time, the adaptation rates of online shopping continued to increase, even after the lockdown measures were eased.

4%
change from online to offline outlets for solidarity reasons

13%
of offline shoppers migrated to online retail

Consumer solidarity with local shops not strong enough

The result: getting sympathy is no substitute for added value

Source: German Retail Association (HDE)

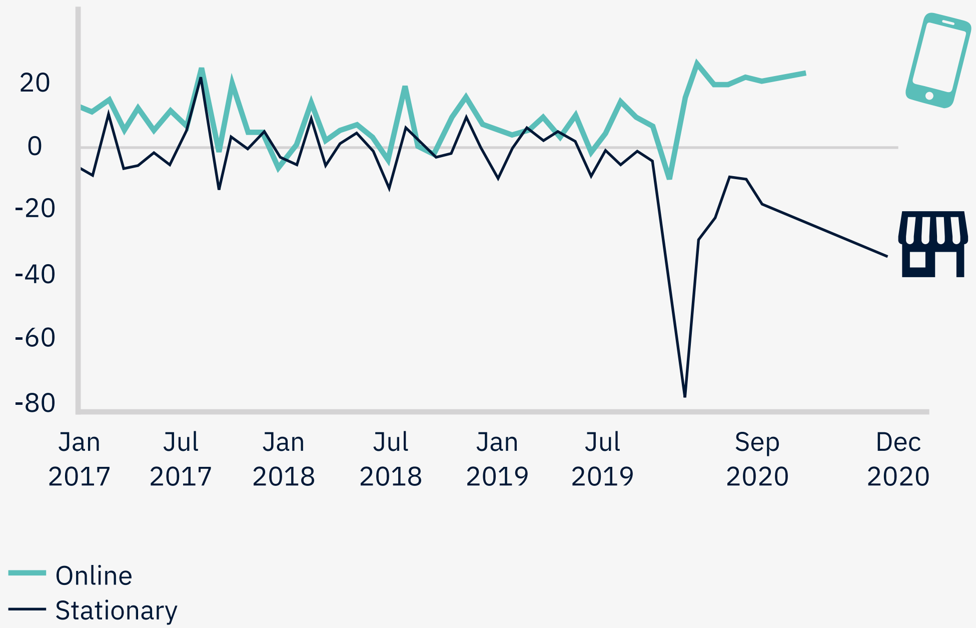
Future

Store concepts need to be digitalised for omnichannel services

More and more consumers substituted their visit of a brick-and-mortar retail store with online shopping. Revenue performance of the big online marketplaces reveals an asymmetrical relation between the solidarity of consumers at the beginning of the pandemic and their actual shopping behaviour. Local platforms tend to fail while amazon, Zalando and the like emerge victorious from the crisis. The second lockdown hits over-the-counter retailers in inner city locations particularly hard. This leads us to ask why we have such a large discrepancy between publicly displayed solidarity and actual shopping behaviour – will traditional retail structures continue to be losing out even after the crisis?

In this context, both online sales concepts and the (digital) instore experience of physical retailers will gain significance. In the future, store concepts will have to be digital in order to enable omnichannel services. However, as online purchases increase, the corresponding logistics infrastructure must be expanded and decentralized. Vacant spaces in inner-city areas could thus be turned into logistical mini hubs in order to optimize the use of attractive store spaces as well as the availability of goods. The reduction of vacant space improves the attractiveness of the cityscape, residents benefit from shorter delivery times, and retailers can improve the quality of their services.

Example of fashion retail(1): Revenue development of stationary and online retail YOY (%)



(1) German Market for textiles/clothing, online/mail order incl. shoes, leather goods Source: Destatis; TextilWirtschaft

Desertification of inner-city areas continues

Lockdown measures and the collapse of consumer sentiment have hit retailers and restaurant operators very hard. When we take a closer look, however, we see that the pandemic has only accelerated pre-existing trends. Declining visitor numbers in the inner cities, increasing vacancy rates in retail properties, and the rapid rise of e-commerce are only some of the many trends that were exacerbated by the pandemic. And it will prove impossible to reverse these trends. In order to revitalize the cityscape, we need new and unusual initiatives. Inner cities need to leverage their potential in order to actively shape their future. This could involve non-profit spaces to improve urban quality of life and attract new target groups or inspire new forms of collaboration with retailers. The inner city has to give visitors more than merely being a place for immediate consumerism. Looking at the inner city as an ecosystem will become essential if we want visitor numbers to rise. In addition to the goal of boosting inner-city appeal in the long term, the outbreak of a further wave of infections poses another critical question: how can municipal authorities support businesses in order to avoid a wave of insolvencies?

Trends

Urban non-profit spaces for new target groups

3 CURRENT SITUATION

I RESULTS BY CITY SIZE

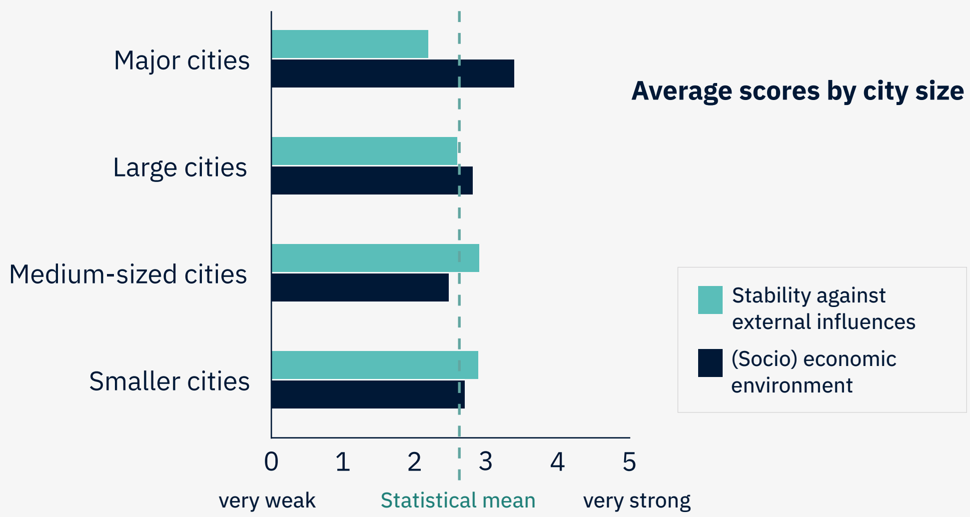
Results

Major cities most affected

The major cities with more than one million inhabitants are those most heavily affected by the decline in visitor numbers due to COVID-19 as is revealed by their weak rating in the category "stability against external influences". Predominantly, these figures are driven by the strong decline in commuter traffic, school closures, the lack of trade fairs/events, and decreased tourism. In all areas that are not directly affected by COVID-19 in this short period of time, however, the major cities continue to score better than smaller cities.

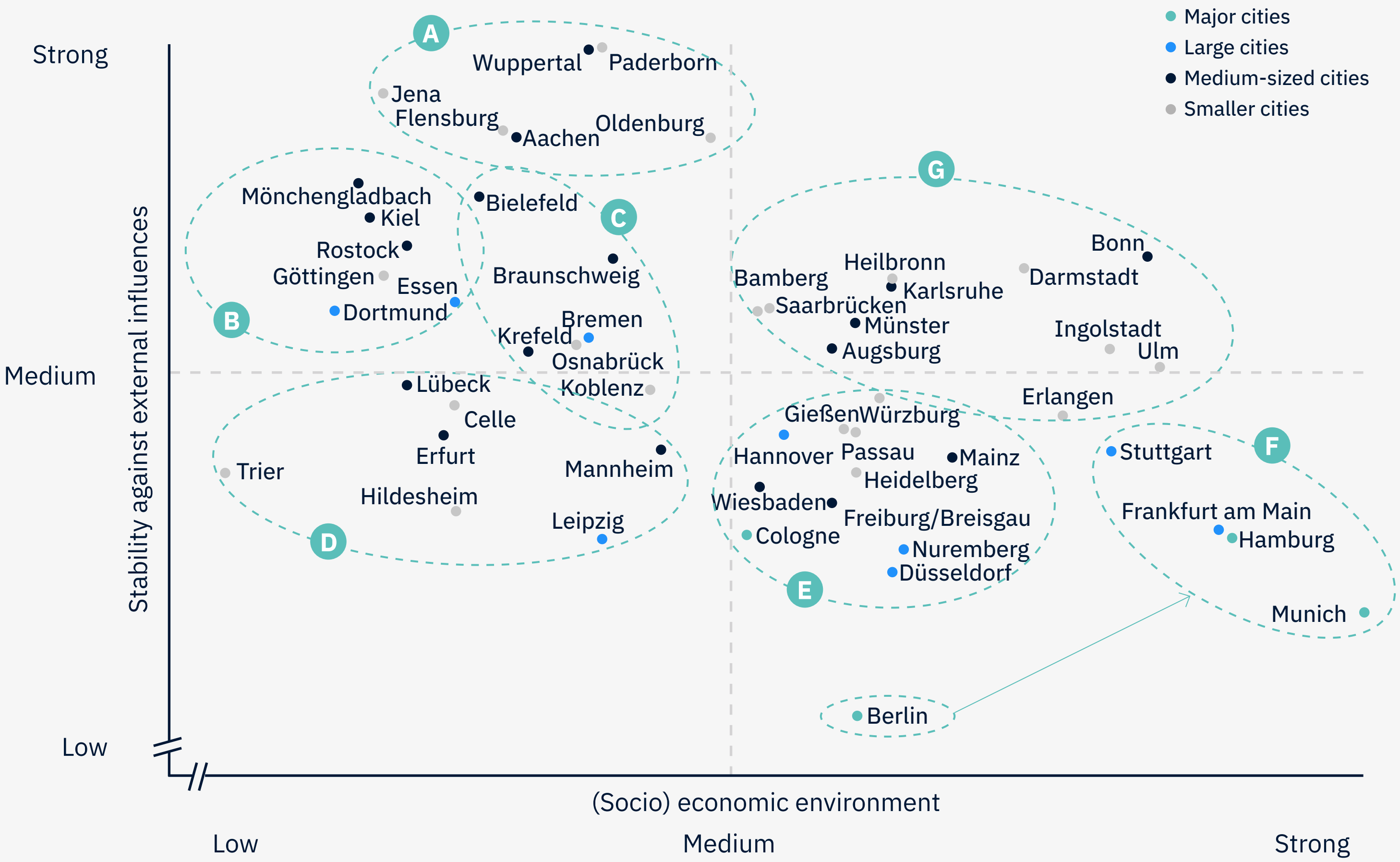
The situation in large cities with 500,000 to 1,000,000 inhabitants is similar to the situation in the major cities. Here too, the strong decline in visitor frequency has a negative impact on the inner cities. The (socio) economic environment is close to the statistical mean of the cities under analysis and remains unaffected by COVID-19 in this short period of time.

Smaller cities (<200,000 inhabitants) and medium-sized cities (200,000 – 500,000 inhabitants) are the least affected by the economic effects of COVID-19. The fairly constant visitor frequency in their inner-city areas is particularly noteworthy. In addition, their inner-city economy is less dependent on variables such as commuter traffic, trade fair events and tourism. Despite of the variance in the extent of the impact, all city sizes are massively affected by the economic consequences of the COVID-19 pandemic. A strong decline in visitor frequency and an acute need for action was identified in all of the cities under analysis. The question of how to revitalise the inner cities is therefore the same for all cities investigated.



II RESULTS BY CITY CLUSTER

Scoring Model



After receiving their scores based on the weighted factors, the cities were entered into the matrix on the left for illustration purposes. In the next step, the cities were divided into seven different clusters for further analysis. The lines separating the quadrants show which cities score below or above the statistical mean in the relevant general categories (stability against external influences and (socio) demographic environment). The illustration reflects both the status quo and development over the past few years. The future potential of up-and-coming cities such as Leipzig has not been taken into account.

According to the research institute Prognos, those cities will come out top in the future that are able to attract people of working age and thus counteract the growing shortage of labour.

Description of the clusters

DESCRIPTION OF THE CLUSTERS:

A Despite the rather weak macro-economic environment, these cities are less dependent on external visitor frequency and therefore less affected by a decline. With a scoring of 1.8, the economic output in these regions is considerably lower than in other clusters.

B This cluster features an above-average digital maturity level while the purchasing power is relatively low and unemployment figures tend to be high. At the same time, these cities are less dependent on streams of external visitors such as visitors of trade fairs, tourists, and commuters.

C Even before the COVID-19 pandemic, these cities experienced declines in visitor frequency and low population growth, as well as low rent levels and a well-developed mobility network. Moreover, the vacancy rates in these cities' commercial properties are low.

D Despite affordable housing, these cities experienced a strong decline in visitor frequency before and during the COVID-19 pandemic. The macro-economic environment is weighed down by the below-average economic development and partly weak catchment areas.

E Before the pandemic, inner-city visitor frequency was at a comparatively stable level, which is why the COVID-19 pandemic hit these regions particularly hard. Despite relatively high vacancy rates and rent levels, these cities feature above-average quality of life and strong purchasing power.

F The major cities with a beneficial macro-economic environment suffered a particularly sharp decline in visitor frequency as trade fair visitors, tourists and commuters stayed away. In addition to comparatively high vacancy rates, all cities in this cluster feature high rent levels.

G Many of these cities benefit from being university cities. They are characterised by their economic strength with high purchasing power and their stability against external influences. Despite their excellent scoring, these regions have high rent levels.

WHAT NEEDS TO BE DONE?

Overview of measures on pages 13 and 14

III ANALYSIS OF SELECTED CITIES

Bonn

Among the hidden champions, Bonn achieves the highest result in the (socio) economic environment dimension. This is remarkable, as most of the cities with a comparable economic environment tend to show a more volatile reaction to changes. While Bonn suffers from a strong decline in visitor frequency due to COVID-19, this decline is offset by other factors. Stability factors that speak in Bonn's favour are an excellent transport link to the inner city and the city's high degree of digital maturity. In the long term, these two factors may form the foundation for innovative future concepts towards boosting inner-city appeal as well as an increased collaboration between retailers and the city.

Paderborn

When examining stability against external influences, the city of Paderborn stands out: with a decline in visitor frequency of about 21%, the impact of the COVID-19 pandemic was relatively low in 2020. The crucial factor here is the situation before the pandemic. As visitor streams had not been driven by trade fair visitors or commuters before the pandemic, the corresponding decline was relatively moderate after the outbreak. This is not necessarily an advantage in the long term, however, as tourists, trade fair visitors and commuters are important contributors to visitor frequency in a city. Paderborn benefits from its advantageous location though, as there are not many competing cities in its surroundings.

Berlin

Among all cities analyzed in the study, Berlin is affected the most by the impact of the pandemic. While Berlin achieved an above-average position in the (socio) economic environment dimension, its high dependence on external factors drags the supposed top performer down considerably. In Berlin, this effect is due to a strong decline in frequency, but also to the general cityscape. In the wake of the COVID-19 pandemic, visitor frequency dropped by 44% in Berlin, which means Berlin experienced the second most pronounced slump after Hildesheim. In addition to the drastic decline in visitor frequency, the absolute number of potential consumers also declines as tourists, trade fair visitors, and commuters stay away. Large parts of the 320,000 daily commuters no longer benefit Berlin as potential retail customers as they relocate their work places to their own homes.

Trier

The city of Trier is a particularly attractive tourist destination. Despite the positive economic effects of tourism, the travel restrictions prompted by COVID-19 led to a significant decline in the number of external visitors to the city. In addition, the number of inhabitants in the city is also on the decline. A high unemployment rate of 7.4% and below-average economic growth impair the conditions for all actors in the inner city. Furthermore, there is room for improvement in the area of digitalization and with respect to cultural offers and leisure opportunities.

4 WHAT NEEDS TO BE DONE?

I TOOL BOX FOR SHORT, MEDIUM AND LONG-TERM MEASURES

	Short term	Medium term	Long term	Cluster focus
1. **Measures to promote the general revitalisation of inner cities**	• Introduce targeted city marketing measures (e.g. loyalty campaigns across the city; after the end of the restrictions: family events such as family-friendly festivals, more bicycle campaign days, cultural events such as music stations across the inner-city area, food truck events, etc. incl. comprehensive advertising of these activities via social media)	• Provide basic infrastructure for visits to the inner city (e.g. drinking fountains, seating, public power points, toilets, etc.) • Provide digital infrastructure (e.g. public wireless network, city app with integrated digital services such as smart parking or discount campaigns for local stores) • Calm traffic by expanding public transport and promoting a car-free inner city, expand bicycle paths, establish visits to the city as a nature excursion	• Increase intervention in the mix of how inner cities are used by actively letting vacant spaces or using them for city initiatives, review rent options/flexibilisation for small businesses • Develop the neighbourhoods in new districts of the city by providing a local shopping infrastructure and promoting diversity in commercial and property use concepts	A to G
2. **Increase the attractiveness as a business location**	• Temporarily simplify the public procurement process for a quicker implementation of public investment support • Support the office infrastructure in order to attract small and medium-sized enterprises (e.g. monetary aid for IT infrastructure, office furniture, etc.)	• Establish founder and innovation centres	• Continuously promote and/or establish university and research institutes	A, B, D

3 to 5

3. Improve the regional purchasing power	• Make retail opening hours more flexib-le (e.g. opening on Sundays)	• Consumer-side subsidies for inner-city restaurants or retailers	• Launch a regional loyalty card for inner-city retailers (loyalty programme)	A, B, D
4. Raise visitor frequency in inner cities	• Initiate target group-oriented activities and events in the inner cities (e.g. vocational training fairs, product shows, etc.) • Relocate retail space to the outdoors	• Close streets and introduce pop-up non-profit spaces (e.g. urban gardening, childcare, sports and yoga classes, etc.)	• Establish shopping streets that are managed by the city administration in new districts of the city to influence and improve the different ways they are used	C, D, E, F
5. Prevent rising vacancy rates and rent levels	• Interim rental of vacant upper floor spaces as mini logistics hubs in the inner city • Establish interim use agencies for the targeted letting of vacant commercial premises	• Rent vacant commercial spaces in inner-city areas for the potential use for inner-city initiatives • Subsidise rents for new, promising concepts	• Place educational and cultural institutions in vacant commercial properties • Cities should invest in housing companies to promote the construction of social housing	E, F, G

II SHIFT IN MINDSET REQUIRED

We need a fundamental shift in the mindset on the part of retailers as well as political decision-makers

Cities have to take over the responsibility and actively collaborate with the actors in the inner-city areas. In addition to financial support by way of strong economic stimulus measures, cities need to focus in particular on organizational support measures to achieve sustainable effects. Establishing a far-reaching public wireless network could enable retailers, for example, to further promote the digitalization of their stores and to introduce cross-channel services. In order to improve the cityscape and visitor frequency, educational institutions could be relocated back to the inner city.

Recent years have shown that owner-led businesses are increasingly being squeezed out by large retail chains. However, the ever-rising success of chain stores has taken a hit since the beginning of the pandemic. More and more large retail spaces are vacated as chain stores withdraw and look for smaller premises. To prevent these areas from becoming deserted, retailers and the city should enter into a more lively dialogue. It is now the time to question the existing store concept of brick-and-mortar retailers. The cities must get to know the trends within the sectors and create the conditions necessary for their implementation. To counteract the increasing privatization of inner-city events, cities have to become more involved again in inner-city life. This can strengthen the sense of belonging and political participation of residents, which may lead to valuable new approaches. To collaborate with residents on these approaches will enable cities to collect new ideas and implement them more efficiently.

Store concept?

Increase collaboration between retailers and cities

III STRATEGY DEVELOPMENT TO OVERCOME THE CRISIS FOR INNER CITIES

A potential crisis management strategy for the challenges discussed in this study follows three successive stages of development: the protection phase, the planning phase and a pilot phase.

Protection phase

Stall existing downward trends

The goal of the protection phase is to safeguard the survival of inner-city retail structures. During this phase, cities have to introduce incentives to revive visitor frequency to the inner city. Moreover, cities have to place emphasis on providing the affected businesses with comprehensive information and assistance, for example by identifying macro data or by establishing groups that can exchange regional experiences, possibly through the local chambers of commerce. This will improve the negotiating position of retailers and other businesses in the inner city with their local banks and suppliers. This phase needs intensive communication, for example through round table discussions between landlords, tenants, city development bodies and representatives of regional groups that exchange experiences via the chambers of commerce, in order to overcome the challenges brought about by COVID-19. These measures will boost visitor frequency in inner-city areas in a controlled manner and provide local retailers with comprehensive support to master their liquidity shortages.

Planning phase

Develop a sustainable agenda

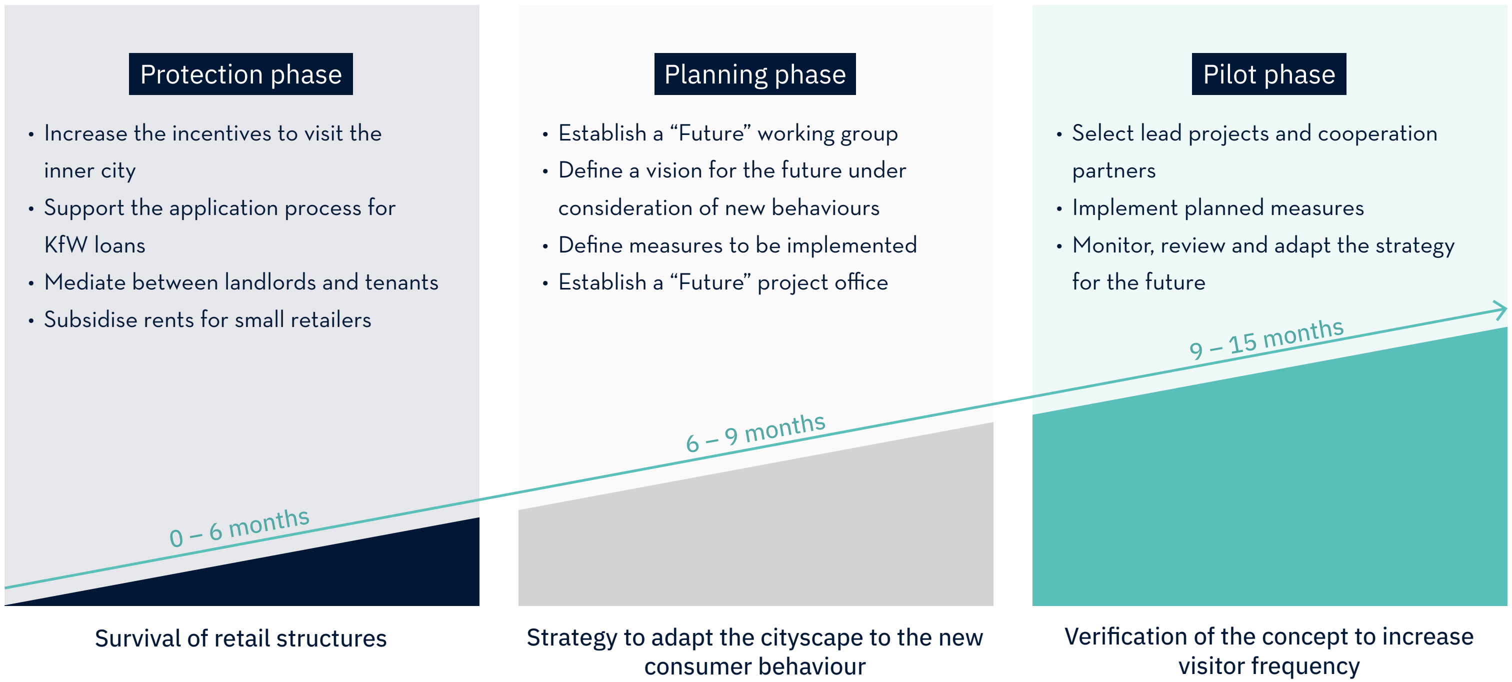
During the planning phase cities have the opportunity to prepare a development strategy that is adapted to the new visitor and resident behaviour. For this purpose, a working group should be established that predominantly focuses on "the future of the inner city". This group should be composed of representatives from the political and commercial sphere as well as representatives of the local neighbourhoods. The next step for this working group is to develop a realistic vision that reflects new patterns of behaviour and trends in the inner city. Based on a concept of measures that will then be developed, it must be ensured that the measures can also be financed. This initiative serves to adapt the cityscape proactively based on the new consumer behaviour.

Pilot phase →

Pilot phase

Realise the concept of measures

The pilot phase serves to operationalise the measures defined in the planning phase. For a successful project management, the city should define concrete lead projects and select cooperation partners. After that, the measures for the future city development can actually start to be implemented. At the same time, it is particularly important to permanently monitor the development steps in order to be able to review and, if necessary, adjust the crisis management strategy. This serves to validate the concept for revitalising the inner city.



ADDITIONAL INFORMATION

I STRUCTURE OF THE SCORING MODEL

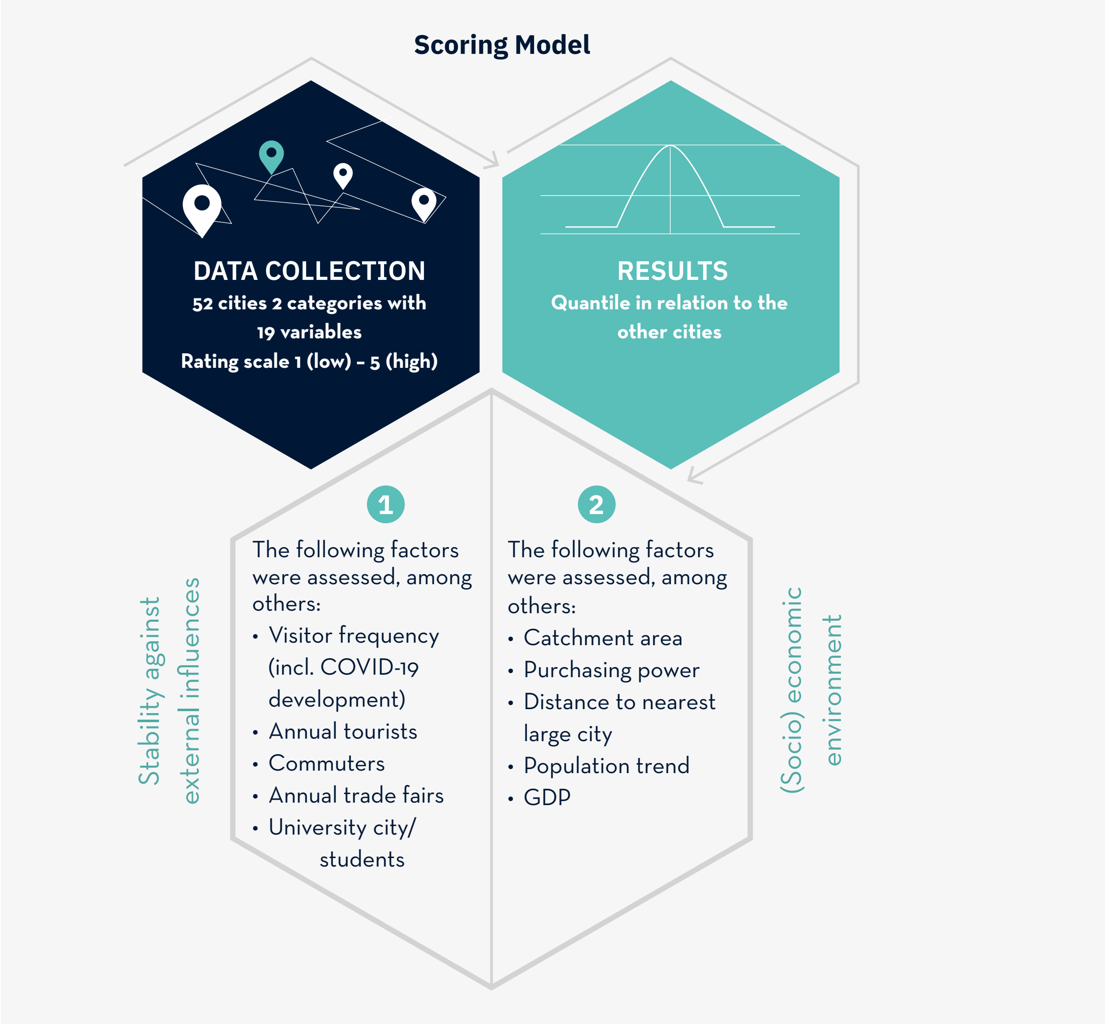
STRUCTURE

Two-dimensional analysis

1 Stability against external influences

Stability against external influences describes how robust a city is when it comes to reacting to negative influences other than structural problems. Volatile potential visitor trends in the inner city thus indicate an increased dependence on external influences. A city's stability is fundamentally influenced by two categories: the cityscape and external streams of visitors. The attractiveness of the cityscape can be assessed based on the following criteria: the number of retail outlets, cultural offers and leisure opportunities, vacancy rates, transport link, digital maturity, rental prices and the classification as a university city.

An attractive inner city needs not only a well-balanced product mix but also central magnets like tourist attractions. Flagship stores of well-known brands, an appealing mix of shop and restaurant concepts, as well as distinctive cultural offers and leisure opportunities also contribute a great deal to the attractiveness of the inner city. Low vacancy rates are the precondition for a lively cityscape and have a significant influence on the attractiveness of the city for businesses and residents. The basic prerequisite for commuter traffic and city tourism is a well-developed transport network. At the same time, the transport infrastructure plays an increasing role in connection with attracting new residents.



DIMENSION 1

Relevant movement parameters

The digital maturity of the city also plays a major role for retailers, as it reflects the innovative spirit and progressiveness of the location. Moreover, a local university in the city has a positive effect on local demand and can be a point of attraction for tourists. An attractive cityscape relies on high visitor frequency, as a lack of visitors would lead to a desertification of the inner city. At the same time, the cityscape also determines the extent of external visitor streams, which is why as a next step we analysed visitor frequency in the individual cities.

Although visitor frequency that is driven by tourists, commuters and trade fair visitors reflects the attractiveness of a city, it also makes the city dependent on external visitor streams. Traditional growth factors such as trade fairs, international tourism and commuters present cities with massive problems and have to be replaced. A strong dependence on external visitor streams thus poses a threat to cities. And the situation is similar with regard to visitor frequency in inner cities. The effects of the COVID-19 pandemic provoked a significant decline in frequency, which will have dramatic consequences for retailers, restaurants and the real estate market.

2 Socio) economic environment

The (socio) economic environment of the cities in our study is assessed based on the following criteria: gross domestic product per capita, population growth, catchment area, distance to the nearest large city, unemployment rate, quality of life and purchasing power.

The appeal of a city manifests itself in continuous population growth. Proximity to the nearest large city or corresponding catchment area provides information on the level of competition between the neighbouring cities. In heavily populated regions with a high density of cities, it is easier to move to the neighbouring city or do the shopping there at the weekend, which is why competition between cities tends to be higher in such regions. The attractiveness of a city as a place to live depends on the quality of life it offers. Economically strong regions in Germany boast a high industrial density and the associated high purchasing power. Furthermore, these regions feature low unemployment figures and a high gross domestic product. For cities that achieve a high scoring in this category, chances are good that the inner-city areas will recover quickly after the pandemic has subsided.

DIMENSION 2

Relevant macro-economic factors

II GLOSSAR

	Variable	Indicator
Stability against external influences	Transport link	Accessibility of the inner city for residents of the metropolitan region
	Number of shopping centres	External visitor streams are attracted by a high density of stores
	Cultural and leisure offerings	A large variety of events brings additional visitors to the inner city
	Vacancy rates for commercial spaces	Trend indicator for changes in the cityscape
	Digital maturity	Strength of the digital infrastructure
	Rent level	Average rent per sqm
	University city	Effects when university courses cease to take place
	Number of tourists p.a.	Lack of tourists' impact on consumption
	Number of commuters	Impact of missing commuter frequency
	Number of trade fairs	Lack of trade fair visitors' impact
	Visitor frequency inner city (in the past)	Number of visitors to the inner city before the COVID-19 pandemic
	Visitor frequency inner city (COVID-19 development)	Decline in inner-city visitor frequency in the wake of the COVID-19 pandemic
(Socio) demographic environment	Economic output	Gross domestic product (GDP) in 2018
	Population growth	Annual population growth 2015-19 (CAGR)
	Catchment area	Catchment area of the inner city (number of inhabitants)
	Distance to the nearest large city	Number of cities with more than 100,000 inhabitants in a radius of 50 km
	Unemployment rate	Unemployment rate of cities in 2019
	Quality of life	Well-being of inhabitants and potential external visitors
	Purchasing power (indexed)	Income available for consumption in 2019

III CONTACT PERSONS

Dorothée Fritsch
Director
Mobile: +49 160 90658014
fritsch@andersch-ag.de

Mike Zöller
Partner
Mobile: +49 175 5850391
zoeller@andersch-ag.de

In the next issues of our "Future Cities" study series, we will take a closer look at the individual components of current inner-city areas and analyse how they have changed over time.

The second issue will analyse how retail locations gradually evolve into experience showrooms – and show the role of omni-channel distribution systems in this development.

Sources: BKG Bund, Federal Employment Agency (Bundesagentur für Arbeit), German CarSharing Association, Cellesche Zeitung, Der Standard, Deutsche Bahn, E-Scooter Blog, expert interviews, Flensburger Tageblatt, FreeMap-Tools, FTI Consulting, Google Maps, Göttinger Tagesblatt, Handelsblatt, Handelsverband Deutschland, Haselhorst Associates, Hystreet, Immobilienscout24, Chamber of Industry and Commerce (Frankfurt am Main, Karlsruhe, Nuremberg, Schleswig-Holstein), Kieler Nachrichten, Landesbetrieb IT. NRW, Landesdatenbank NRW, Leipziger Internet Zeitung, LWL-Statistik, meinestadt, Michael Bauer Research, Miet-Check, Ministry for Labour, Health and Social Affairs NRW, Nationale Stadtentwicklungspolitik, Neue Presse, Nordwest Zeitung, Osnabrücker Zeitung, Ostsee Zeitung, Parkopedia, Presseportal, regionalHeute, Rheinische Post Online, RIWIS Online, Saarbrücker Zeitung, Scooters Civity, ShareNow, Statista, statistical state offices (Baden-Württemberg, Hamburg and Schleswig-Holstein, Hessen, Rheinland Pfalz, Thuringia), federal and state statistical offices, federal statistical office Germany (Statistisches Bundesamt), Tagesspiegel, TourismusNRW, websites of trade fair operators (Berlin, Düsseldorf, Erfurt, Essen, Frankfurt, Freiburg, Hamburg, Cologne, Karlsruhe, Leipzig, Munich, Stuttgart), city websites (Bamberg, Bochum, Bonn, Erfurt, Ingolstadt, Hamburg, Hannover, Karlsruhe, Leipzig, Mannheim, Munich, Passau, Trier, Vienna), Weser Kurier, Westfalenhallen Group, WirtschaftsWoche, Zeit Campus, Zeit Online

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