

Location Analysis Leonding



CINEMA - DTP327
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1. Purpose of the location analysis

As part of work package 1, CIMA's task is to perform an initial, general location analysis in all CINEMA pilot locations. The main aspects and objectives of this location analysis can be summarised as following:

- ▶ professional assessment of the economic and urban development structures in the city centres of the 8 pilot locations
- ▶ on-site visits including inspection of the micro pilot locations for creative industries development
- ▶ evaluation of the economic effects and interactions of the creative industry projects on the inner-city structures
- ▶ professional input or comments for the planned pilot model in the creative industries
- ▶ conception of accompanying measures to make inner-city areas more attractive

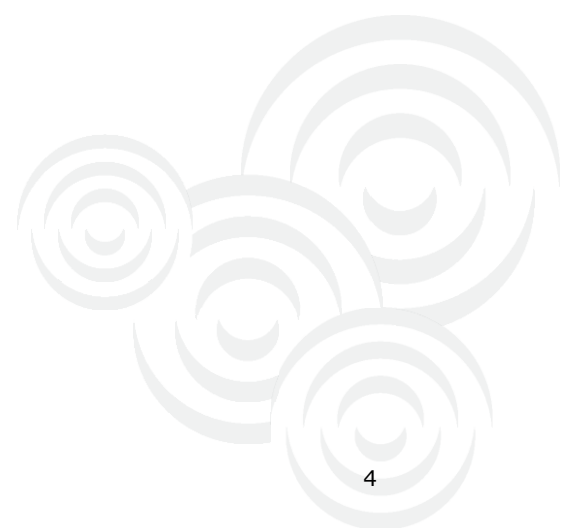
The site analysis is based on the following insights and results:

- ▶ results of the written surveys by CIMA, CIKE and HDS
- ▶ on-site visit or inspection of the planned micro-location in Leonding for pilot model implementation
- ▶ "city check" - economic and urban development on-site analysis of the city centre on the basis of a 23-part catalogue of criteria
- ▶ "trend check" - evaluation of the city centre of Leonding on the basis of 24 current trends in consumer- and location marketing, retail, gastronomy and residential sectors

- ▶ meetings with local decision-makers from the investors improvement and location marketing unit and municipality administration of Leonding
- ▶ CIMA's many years of experience in the economic and urban development assessment of city centres and corresponding location benchmarks

Due to the overall CINEMA project concept, the financial and time limits, this location analysis is a first orientation guide, but **not a complete** (inner) urban development concept.

The on-site analyses in Leonding were conducted by CIMA on **September 2nd, 2020**.

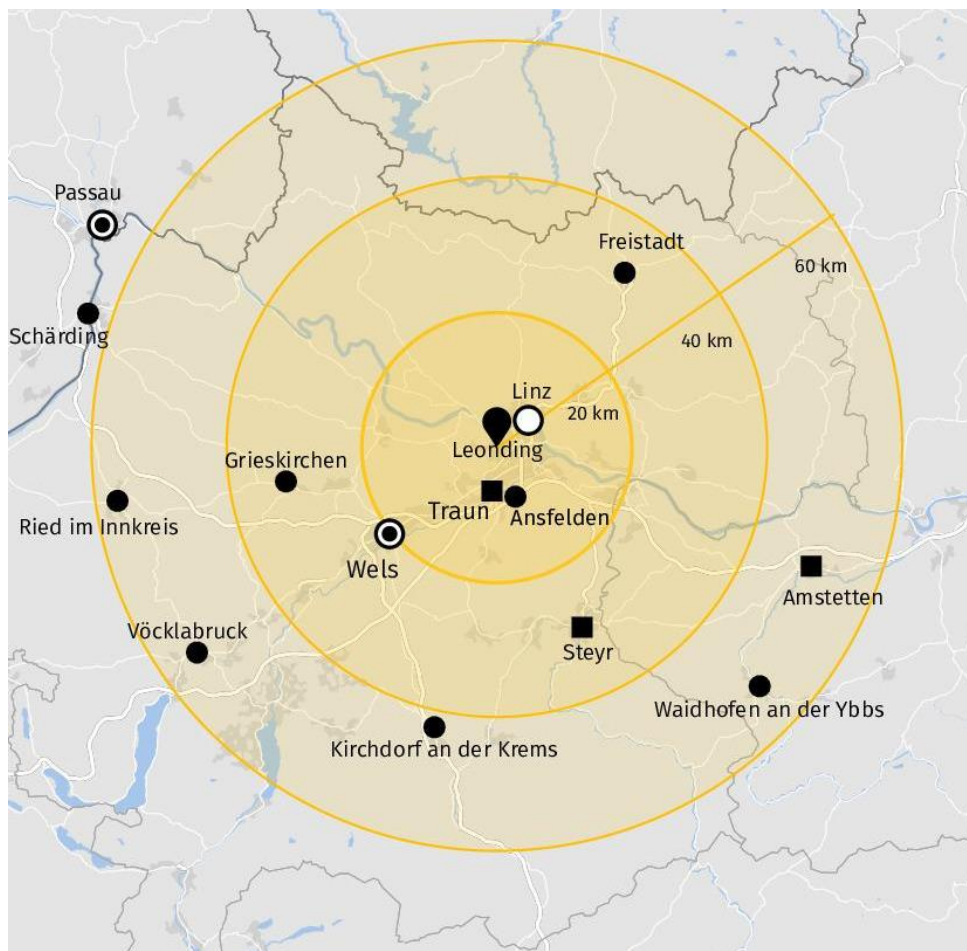


2. Facts and figures about Leonding

2.1. General description

With approx. 29,000 inhabitants, Leonding is the **fourth biggest city** in **Upper Austria**, located south-west of the capital of Linz among the economic booming “central region” of this Austrian State.

Leonding is basically divided between a **“centre North”** (around “Stadtplatz”) and the **“centre South”**, which is at “Harter Plateau”, where for example the Higher Technical School, an event location (“Kürnberghalle”) and some bigger businesses are situated.



Source: www.mapz.com, adapted by CIMA, 2020

The main public railway route from East to West cuts directly through the city area. There is also a direct tram connection to the capital city of Linz. Therefore, many people commute to Linz to work, as there is an excellent connection by rail and road.

Leonding transport connections



B 139 Welser Straße goes directly through Leonding and connects eastwards to the motorway A7 (approx. 4.5 kms from Leonding centre north) and in the south to A1 (approx. 12.5 kms)

from Leonding centre north to Linz centre it is approx. 5 kms (10 mins.) by car



located at the main East-West corridor; several regional trains and a direct connection with the tram to Linz



closest airport is Linz Hörsching (approx. 9 kms/12 mins by car; public transport connection is not very good)



2.2. Economic structure

With around 2,100 companies and 12,400 employees (Statistik Austria, 2019), Leonding has by far the highest density of companies and employees in the Linz-Land district.

Due to its immediate proximity to high-ranking transport infrastructures (e.g.: Hörsching Airport, Danube Port Linz, several motorways and motorways) as well as to the provincial capital and because of the large open space potential, a number of large industrial and commercial enterprises have settled here in recent decades (e.g. Ebner Industrieofenbau, Rosenbauer, Poloplast, etc.).

In contrast to the city centre with its small-scale retail and consumer-related service shops, a large retail park agglomeration has developed along the road B139 since the end of the 1980s. In 1990, the 30,000 m² UNO-Shopping shopping centre opened, but it has been largely empty for years.

2.3. General location data

The main socio-demographic and economic data and facts of the city of Leonding are presented in overview on the following page.



Leonding



Population development



Average age (2018): 41,1 years

Retail businesses in the city



54% purchasing power retention

159 Mio € retail turnover (13% in the city centre)
55.550 m² retail surface (9% in the city centre)

Economic data in the municipality

- Ø 2954€ private net- income per capita per month (AUT)
- 12.400 employees in the entire city
- +13,35% of employees from 2011 to 2020
- 2115 companies in the municipality



Tourism in the municipality



6 hotels
33.550 overnight stays in 2019



+ 0,92% in the last 5 years

Average Rent

- Retail stores: Ø 9,4€/m²
- Gastronomy: Ø 7,3€/ m²
- Office space: Ø 8,4€/m² (only average data from spaces belonging to the municipality)



Sources: Municipality of Leonding, Statistik Austria 2019, www.worldbank.org

Expert remarks:

The following expert remarks are made on the basis of this data:

- ▶ At the beginning of the 20th century, Leonding was still a strongly agricultural municipality with a small population. The strong population development can be observed since the 1950s; in particular, Leonding has been able to increase its population by about 1/3 within the last 30 years (about 3x higher than the Upper Austrian average).
- ▶ The spatially small city centre, which has only become more compact and larger in recent decades, is home to around 16% of the entire urban population. Other districts with large populations include Haag, Hart and Doppl.
- ▶ Despite 55,000 m² of retail space, the purchasing power retention is below average, especially for the medium-term product groups. The main reasons for this are, on the one hand, the existing retail structure in Leonding (primarily specialist stores and discounters and the "disappearance" of the UNO shopping centre) and, on the other hand, the attractive, nearby range of large-scale shopping centres (e.g. Plus City, Center Haid) and the retail offers in the nearby Linz city centre.
- ▶ The average rents on site (in the municipal properties) are to be considered adequate for the location.
- ▶ Tourism is primarily limited to "business" guests. There is no separate tourism marketing unit.



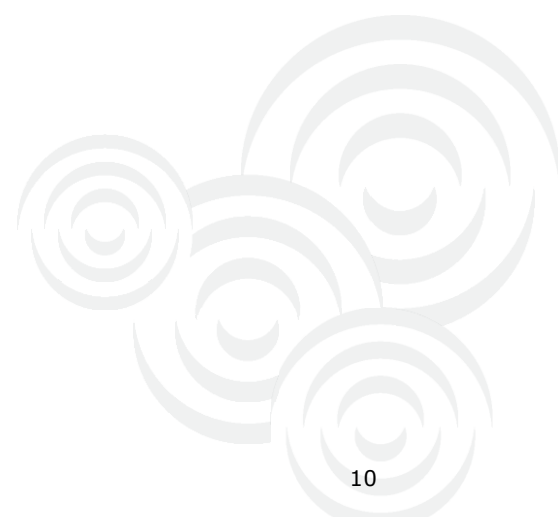
2.4. Town centre marketing and city centre development

In the last decades, the city of Leonding has set accents for the urban development and economic upgrading of the city centre, among other things through the construction of the new city hall and the Rathauspassage (= small inner-city centre with retail, gastronomy, consumer-related service businesses, freelancers, etc.) as well as other design measures.

Based on an urban visioning process (2018), a local City and Location Marketing unit was founded in 2019. This "Agency for Location and Economy", structured as a limited liability company and wholly owned by the municipality of Leonding, focuses on the following fields of activity:

- ▶ Support for business expansions/establishments and start-ups
- ▶ Urban and neighbourhood development
- ▶ Content management of the city region (for a total of 6 municipalities)
- ▶ Positioning of Leonding and image work

The Leonding City and Location Marketing has a total of 4 employees. In addition, around 150 local companies are members of the "Galileo" business association.



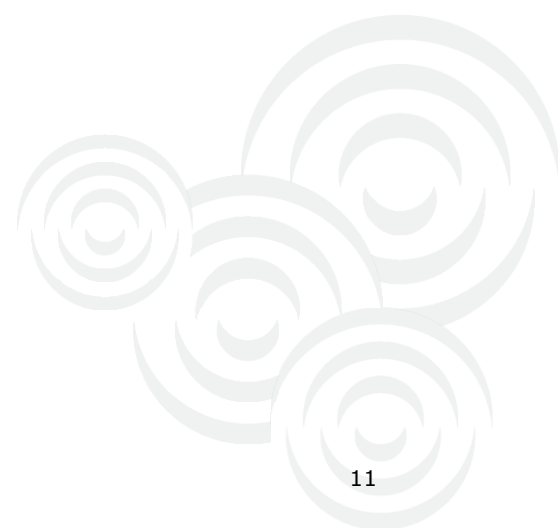
2.5. Creative industries in Leonding

According to the questionnaire from PP 4 HDM and PP 2 CIKE, the start-up scene in Leonding is very well established, whereas the art and cultural scene is not very well established. The creative industries could be more present and visible on social media. There are not that many CI businesses currently at Leonding, though. Most are advertising agencies.

It is said that there is almost no regional mentality within the CI. They are, however, well connected to the local city marketing and with each other as well as the economy and education and science sector. There is “Otelo” - an open innovation and technology lab; a new co-working space will be developed at the pilot location “44er Haus”. Besides that, there are neither shared services, nor business development services.

On a regional level, the Creative Region Linz & Upper Austria, which is owned by the City of Linz and the Regional Government of Upper Austria, is aiming to support the growth and success of the creative sector and trying to position the city/region as a creative hub in Europe.

Naturally, the main funding programmes are on a national level. There are no financial support programmes in Leonding itself.



3. “City check” results

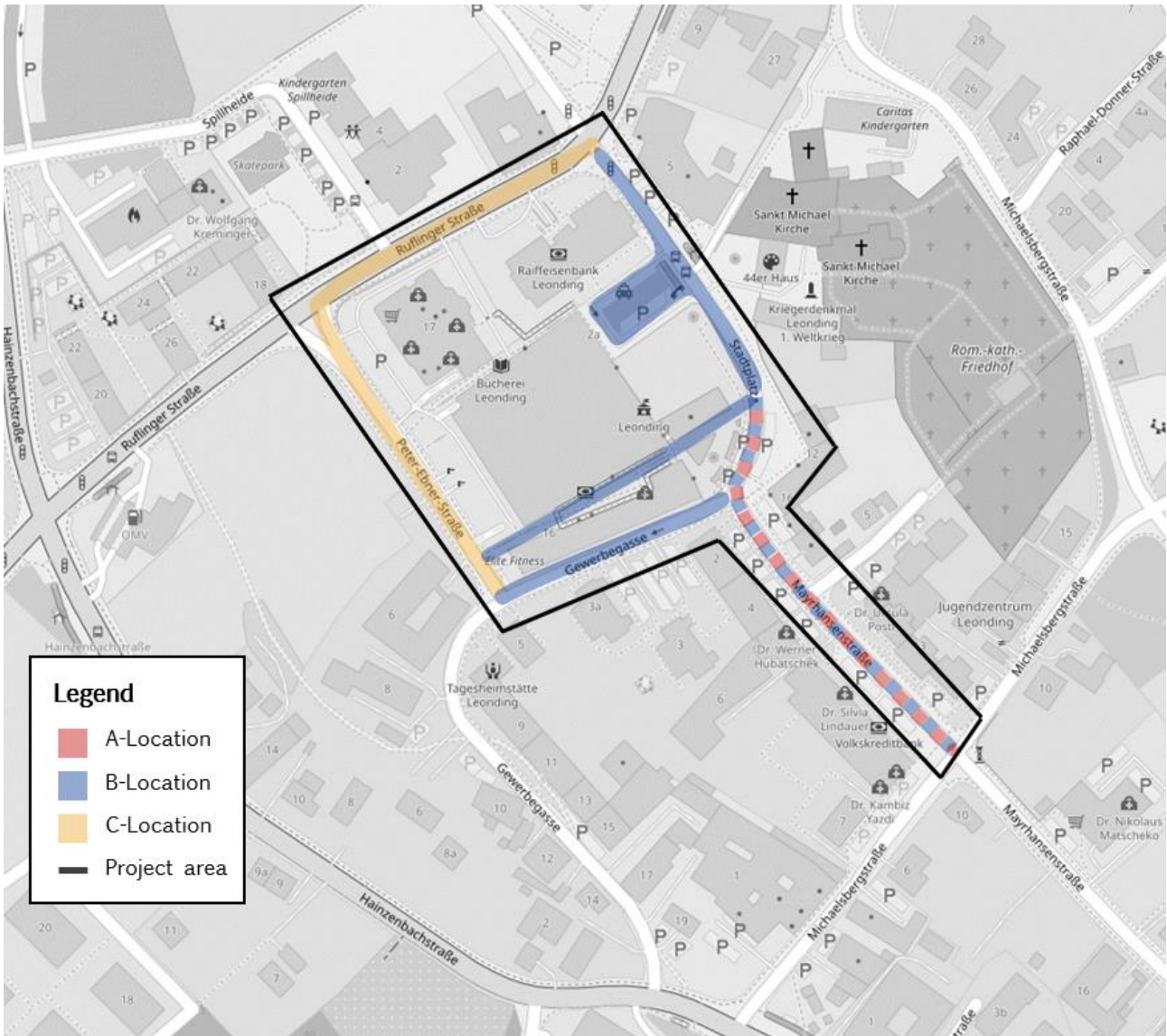
On the following pages you will find the main technical findings of the city check in Leonding, which took place on **September 2nd, 2020**. The city check was done by foot on the basis of 23 urbanistic, property and transport criteria.

3.1. Classification of the inner-city areas

In a first step, the streets, alleys and squares of the city centre were examined according to the individual property-economic location qualities.

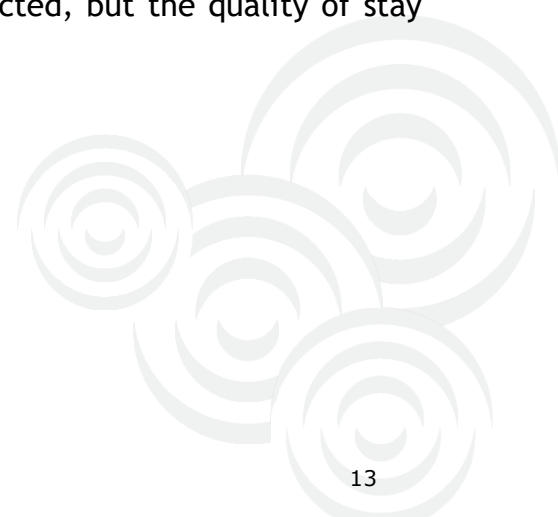
CIMA follows the classification criteria of the real estate industry and divides the city centre of Leonding into the following three location qualities:

location qualities in city centres	description
1A	<ul style="list-style-type: none"> ▶ main shopping area of the city centre ▶ high pedestrian flow ▶ continuous use of the buildings at ground level as commercial space ▶ diversified mix of retail trade, gastronomy and personal services enterprises
1B	<ul style="list-style-type: none"> ▶ significantly lower pedestrian flow ▶ visible gaps of business-oriented ground floor use
1C	<ul style="list-style-type: none"> ▶ low pedestrian flow ▶ frequently accumulation of empty spaces ▶ usually presence of retail companies with special product ranges and high percentage of repeat clients



Source: openstreetmaps.com, adapted by CIMA, 2020

The city centre of Leonding consists mainly of **service providers**, including the town hall, some **retail** (drug stores, food, electronics, fashion/shoes...) and **gastronomic entities**, with retail businesses prevailing. The centre is well connected, but the quality of stay could be improved.



3.2. Assessment of the inner-city quality

Based on the criteria set, CIMA assesses the inner-city qualities in the following way:

“city check” criteria	description
city greening	▶ “islands” of greenery
illumination design	▶ partly illumination design in the inner-city areas ▶ street lamps and some illumination of buildings at night
city furniture	▶ partly (stone, wood, metal, plastic materials; no unified design)
cleanliness	▶ in general very good, some minor issues
surface design	▶ different surfaces; asphalt and paving, cobble stone, stone and concrete tiles
house facades	▶ buildings from the 19 th to the 21 st century, a lot of buildings from the 1970ies and 1980ies ▶ some houses in the whole inner-city area needs to be renovated
barrier free design	▶ partly barrier free ▶ some buildings are not barrier free
pavement width	▶ in general good
pedestrian safety	▶ on the main square and in the traffic calmed area
parking facilities	▶ sufficient parking space for the various user groups ▶ surface parking, parking garage
traffic and signposting	▶ some signs with an overview of shops located next the town hall, besides that not much signposting
usability for events	▶ generally possible ▶ on the square in front of the town hall

A final evaluation of the urban development structures of inner-city area shows the following result:

	1	2	3	4	5
overall impression of the city centre ambience			●		
quality and density of retail trade			●		
quality and density of gastronomy				●	
cleanliness		●			
city greening		●			
illumination design		●			
surface design & condition		●			
presence and condition of monuments			●		
house facades and building conditions		●			
density and condition of traffic/signposting			●		

(evaluation by school notes: 1 = very good; 5 = very bad)



3.3. Further comments to the city centre quality

The city check was conducted for the **Northern centre of Leonding**, around the central square “**Stadtplatz**”, where the town hall is situated. This square is quite large in proportion. Besides the town hall, a bank institute “Raiffeisenbank”, a gelateria, a restaurant and a drug store are situated there. Also included in this building complex are another bank institute “Sparkasse” and the public library. Opposite the town hall, there is the pilot location “**44er Haus**” and the church.



“Stadtplatz” is a traffic reduced square with approx. 25 parking lots in the immediate vicinity (short term parking) as well as a big underground parking underneath the town hall (access via “Peter-Ebner-Straße”). The surrounding architecture is quite modern (besides the buildings opposite the square, including the pilot location) and consists of concrete, glass and steel. Most of the buildings have one to two floors. The square is plastered with slabs of concrete, the street is made of cobblestone. There are few sitting possibilities at the square, but a lot of flower arrangements/pots as well as some trees at the parking area. There is a small fountain as well. The square has a modern lighting concept and a good connection to the public transport system with bus stops directly in front of it. In front of the pilot location, there is a sculpture and fountain as well. The entire “Stadtplatz”, from the junction with “**Ruflinger Straße**” until the south-eastern corner, can be rated a 1B location.



On the backside of “Stadtplatz” at the corner of “**Peter-Ebner-Straße**” and “Ruflinger Straße”, there is a doctor’s house and a supermarket (Unimarkt). Also on the backside of the town hall, parallel to “Gewerbegasse”, there is a open courtyard “**Rathausgasse**” surrounded by service providers, doctors, a hearing instrument technician, a travel agency, a fitness centre, a drug store and some gastronomic entities. At the junction of “Stadtplatz”, “Gewerbegasse” and “**Mayrhansenstraße**” there is a small corner called “**Michaeliplatz**”, a pedestrian zone with some greenery, a fountain and sitting possibilities. On the opposite side, there is a flower store, a bakery, and a fast food diner with outside sitting areas. In this area there are also some short time parking possibilities.



“**Mayrhansenstraße**”, starting from “Stadtplatz” is a 1B with a potential for a 1A location. There is a diversified utilisation mix with retail (electronics, pharmacy, shoes etc.) and service providers (lawyers, insurance brokers, real estate brokers etc.), bank institutes, doctors, cosmetic studios etc. on the ground floors of multi-storey buildings and a lot of residential buildings with three to four floors. The architecture is roughly from the 60ies to 80ies, there is no continuing design. The topography is shaped by many different levels (street, pavement, stairs, location of the entrances etc.), which creates a rugged appearance. The signposting is rudimentary; there is a unified lighting system as well as some flower pots and greenery. At some points along the streets, there is weed growing around pillars and between the paving. There is short term parking available on both sides of the street.





The Northern centre of Leonding is framed at the North by “**Ruflingerstraße**”, where schools, a kindergarten, some doctors, resident housing and a butchery are located. This is a 1C location.



3.4. Trend check

City centres are - similar to companies - in a multifaceted competition for customers, tourists, investments in private and public infrastructures and projects, as well as companies willing to settle, and much more. Naturally, these inner-city economic areas are also subject to different developments. With regard to the most efficient and sustainable active location marketing and empty space management possible, this chapter of the location analysis highlights the most important current and future 24 European trends relevant to small and medium sized city centres. For the responsible decision makers in Leonding this “trend check” should be a quick and general orientation aid how “trendy” the city centre is.

Leonding's trend affinity is assessed using a simple traffic light system:

“trend check” colour	description
	<ul style="list-style-type: none"> ▶ no “trend affinity” ▶ (still no trend approaches visible)
	<ul style="list-style-type: none"> ▶ moderate “trend affinity” ▶ first trend approaches visible
	<ul style="list-style-type: none"> ▶ high “trend affinity” ▶ city centre is right on trend



location trends	trend affinity		
Trend 1 - Shopping experience The city as a networked experience shopping location (shopping, culture, gastronomy, services) with emotional stimulation			
Trend 2 - Service as a chance to distinguish yourself Clear profiling of inner city retail via top service and specialist advice			
Trend 3 - New city centre affine target groups Addressing new inner city target groups such as LOHAS, DINKs, silver surfers, etc.			
Trend 4 - Multi- & cross-channel Online and offline multi- and cross-channel strategies of local companies are considered a major competitive advantage of city centres			
Trend 5 - New retail city formats e.g.: convenience-shops (products to go) and sustainability-shops (e.g.: repairshops)			
Trend 6 - Worlds of food enjoyment High quality specialist suppliers in the food sector in combination with tastings			
Trend 7 - owner-managed flagships High-quality, interesting products combined with lifestyle and/or feel-good concepts			
Trend 8 - Digitalisation of sales areas Digital technologies and "location based services" determine shop concepts			
Trend 9 - Investment boom for city hotels New city hotel concepts contribute to the offer mix of a city or city centre			
Trend 10 - Alternative accommodation concepts e.g.: albergo diffuso for subsequent use of vacant residential and business units			
Trend 11 - Experience and theme gastronomy Food as an experience by involving the guests in the preparation as well as special catering locations			
Trend 12 - Urban gastronomy concepts Various food concepts such as. Infinite food, spiritual food, etc. reflect the lifestyles of various inner city centre target groups			
Trend 13 - Day Tourism - Positioning Clear, day-tourist positioning of city centres as a strategy for additional absorption of purchasing power			
Trend 14 - Leisure structures in the inner city Sports and leisure infrastructures are returning to the city centres such as motor parks, amusement arcades, cinemas, etc.			
Trend 15 - Local quality labels Local quality labels strengthen competitiveness and help SMEs to position themselves			
Trend 16 - Co-working Alternative vacancy utilisation through co-working spaces and (ideally) simultaneous promotion of the creative industries			
Trend 17 - Educational institution as impulse generator Schools, nursery schools and universities are increasingly returning to the city centres			
Trend 18 - "one stop shop"- town centre marketing A professionalised town centre marketing with integration of location, tourism and cultural marketing agendas			
Trend 19 - Cultural sites as "landmarks" Architecturally sophisticated event locations or museums become inner-city magnet points			

location trends	trend affinity		
Trend 20 - Image-shaping events The city as a stage or playground for new events in the leisure and cultural sector			
Trend 21 - Media libraries Increased development of municipal libraries in the digital field as a multifunctional educational centre			
Trend 22 - Digital city paths Communicating urban history and culture through "virtual" circular routes			
Trend 23 - Innovative forms of inner-city living New inner-city housing forms for different target groups such as: temporary housing, micro-apartments, modern heritage			
Trend 24 - Attractive "start up" scene The city centre as attractive location for young company founders			

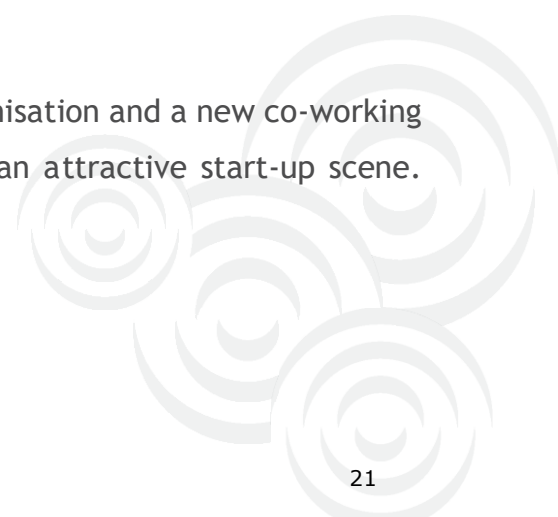
Further comments

The businesses try to provide high quality service in order to distinguish themselves from others. A new app will support a multi- and cross-channel approach. First approaches have been taken towards attracting new target groups. New initiatives for the distribution of food and drinks directly from the producer have been started as well as concepts for experience gastronomy.

More efforts should be taken towards the trend of experience shopping, where shopping, gastronomy, culture and service goes hand in hand and leave a positive, emotional experience. There is currently also a lack of new retail formats, like convenience or sustainability shops. New digital retail areas and technical features have not arrived in Leonding yet.

There is also potential for city hotels and alternative accommodation/residential concepts, as well as bringing the leisure facilities back to town. There are, however, several education facilities, that bring life to the city centre. A - currently missing - media library could compliment the learning experience.

A work in progress is a “one-stop-shop” city marketing organisation and a new co-working space at the pilot location. This could also help to spark an attractive start-up scene. Digital city paths are in planning as well.



4. The pilot location/project - remarks and comments

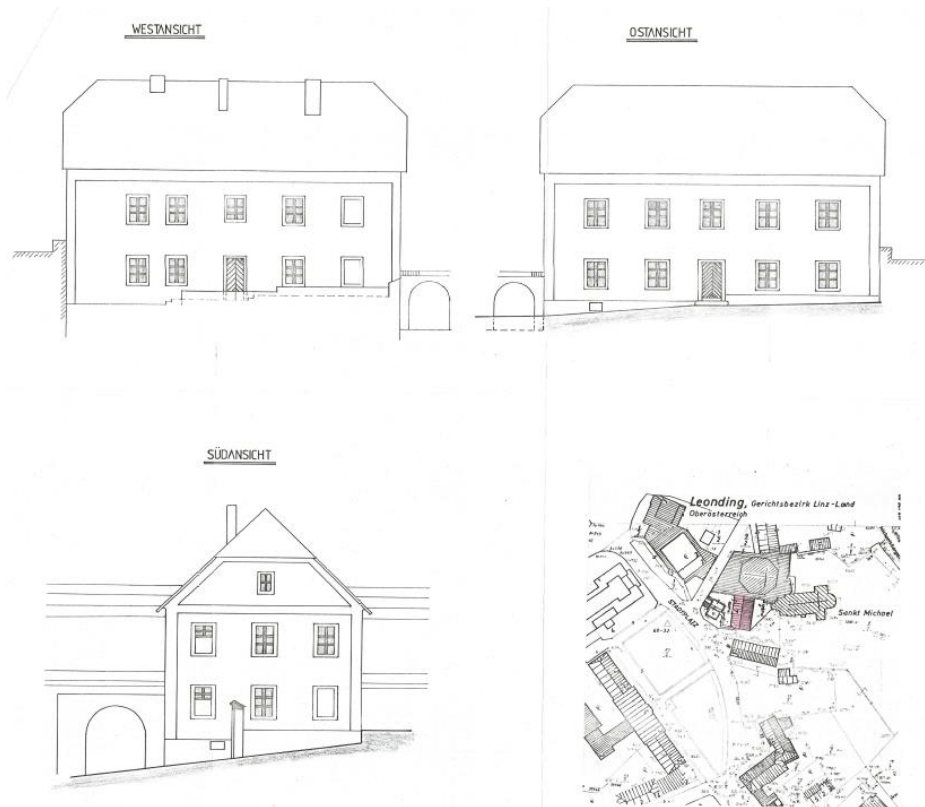
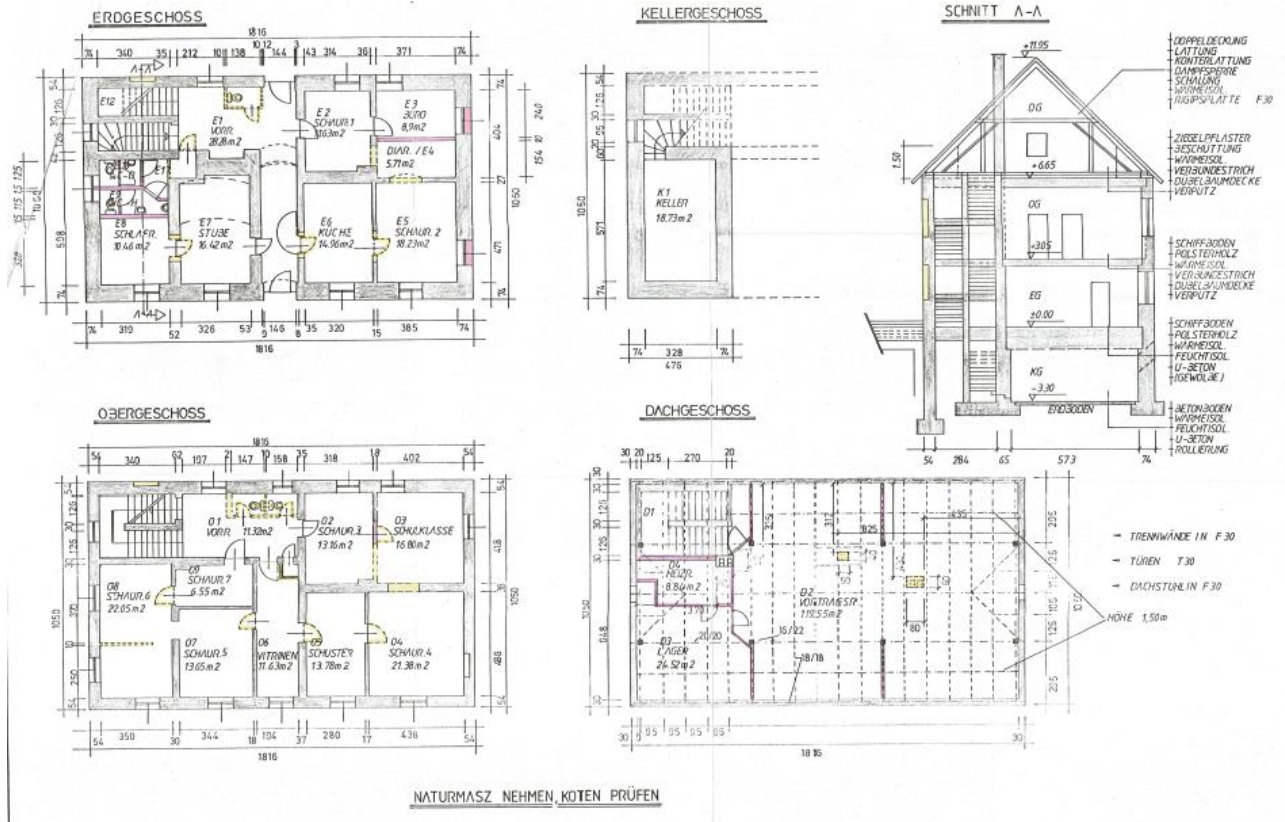
As part of the CINEMA project, Leonding is focusing on a local pilot project in the field of revitalisation of the inner-city core locations through retail and other smaller businesses.

The main focus is to search **concrete** and **sustainable** (economic) **utilization** for the “**44er Haus**” in the heart of the city centre. The blue building with the number 44 is the oldest building in the centre of Leonding. Situated directly next to the church and opposite the town hall, it has a prominent location. The building from 1831/32 is under **heritage protection**. Up to now it was used as school, seat of the municipality administration, library and nowadays as museum. “Oteló” open innovation and technology lab is also located in the building.



The aim is to convert “44er Haus” to a lighthouse example for town revitalisation and a magnet for creatives and regional businesses. The inclusion of various stakeholders and an open, transparent process are a key factor to embed the whole process and the significance of the building and its heritage in the minds of the locals.





Total area:

Basement	18.68 m ²
Ground floor	128.93 m ²
First floor	138.67 m ²
Attic	156.95 m ²

The concrete contents, utilisation scenarios and also necessary additional measures in the city centre are to be developed within the framework of a "design thinking process" by local stakeholders in spring 2021.

CIMA was requested by the City of Leonding not to prepare any proposals and recommendations in advance within the framework of the location analysis, as the local stakeholders are to contribute their own proposals and ideas in the "design thinking process" without being influenced. CIMA will support the process as an external expert.

