RECAP

The Retail Capacity forecasting Model

Project:	**Jersey Retail Study 2008**	Number:	138146
Client:	States of Jersey		
Date of Latest Revision:	10-Jul-08	File:	Jersey RECAP Model 2008

Retail Locations Modelled:

- St Helier Town Centre
- Non-central Shopping in Jersey

Scenarios Modelled:	1	Baseline - No change in market shares from those indicated by the Household Interview Survey 2008.

Notes:

Non-central shopping includes the principal shopping facilities in Jersey outside St Helier Town Centre, but excludes local village shops, farm shops and other isolated shops.

Catchment Area Population and Expenditure

Table: **1**

CATCHMENT AREA POPULATION FORECASTS

Zone	Parishes	Base Year	Forecasting Years			
		2008	2010	2015	2020	2025
1	St Helier	29,964	30,591	31,449	32,175	32,769
2	St Saviour, St Clement, Grouville	26,332	26,883	27,637	28,275	28,797
3	St Martin, Trinity	6,356	6,489	6,671	6,825	6,951
4	St John, St Mary	4,540	4,635	4,765	4,875	4,965
5	St Ouen, St Peter	8,172	8,343	8,577	8,775	8,937
6	St Brelade	10,896	11,124	11,436	11,700	11,916
7	St Lawrence	4,540	4,635	4,765	4,875	4,965
TOTAL		90,800	92,700	95,300	97,500	99,300

Sources:
Statesof Jersey Department of Planning and Environment.
K:\Job Title\Jersey Retail Study 138146\RECAP Model and Input Data\Copy of baseline pop by Zone June 2008.

Notes:

Table: 2

PER CAPITA EXPENDITURE - Average for the Catchment Area

Per Capita Expenditure in (year):	2005	Price Basis (Year):	2005
Including Special Forms of Trading (SFT):			
Convenience Goods (£):	**1,919.48**	Comparison Goods (£):	**2,335.48**

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods:	1.00	% 2005 to	2006	1.00	% pa	2006 to	2026
Comparison Goods:	5.48	% 2005 to	2006	3.90	% pa	2006 to	2026

PER CAPITA EXPENDITURE IN	Convenience Goods (£)					Comparison Goods (£)				
	2008	2010	2015	2020	2025	2008	2010	2015	2020	2025
Including SFT	1,977.64	2,017.39	2,120.30	2,228.46	2,342.13	2,659.36	2,870.84	3,476.05	4,208.85	5,096.14
Deduction for SFT (%)	2.0	3.0	4.0	5.0	6.0	9.0	14.0	18.0	19.0	20.0
Excluding SFT	**1,938.09**	**1,956.87**	**2,035.49**	**2,117.03**	**2,201.60**	**2,420.02**	**2,468.92**	**2,850.36**	**3,409.17**	**4,076.92**

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE - Average for the Catchment Area

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden prdcts	Chemists, medcl & beauty goods	All other comprsn gds	Total comprsn gds
Expenditure in 2005 Including SFT (£)	560.70	134.52	168.73	88.17	314.26	212.52	293.91	562.67	2,335.48
Expenditure in 2008 Including SFT (£)	638.46	153.18	192.13	100.40	357.84	241.99	334.67	640.70	2,659.36
Deduction for SFT in 2008 (%)	7.2	5.0	11.0	9.8	20.0	7.0	3.5	8.5	9.0
Expenditure in 2008 Excluding SFT (£)	592.49	145.52	171.00	90.56	286.27	225.05	322.96	586.24	2,420.02

Sources:
Jersey Household Expenditure Survey 2004/05, Table 1.4, assuming average household size of 2.3 as indicated on page 92.
DTZ estimates of SFT based on Verdict Research. MapInfo Brief 07/02 (UK)

Notes:
Growth 2004 to 2006 is the actual UK national average growth. Growth projections 2006 to 2026 apply the 1998 to 2006 UK average annual trend to the actual 2006 expenditure (convenience goods); and the ultra-long term average annual trend 1964 to 2006 to the actual 2006 expenditure (comparison goods). SFT deduction includes internet shopping, mail order, vending machines and party plan retailing.

Table: **3**

CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (£000)	2010 (£000)	2015 (£000)	2020 £0	2025 (£000)	2008 (£000)	2010 (£000)	2015 (£000)	2020 £0	2025 (£000)
1	58,073	59,863	64,014	68,116	72,144	72,513	75,527	89,641	109,690	133,596
2	51,034	52,607	56,255	59,859	63,400	63,724	66,372	78,775	96,394	117,403
3	12,318	12,698	13,579	14,449	15,303	15,382	16,021	19,015	23,268	28,339
4	8,799	9,070	9,699	10,321	10,931	10,987	11,443	13,582	16,620	20,242
5	15,838	16,326	17,458	18,577	19,676	19,776	20,598	24,448	29,915	36,435
6	21,117	21,768	23,278	24,769	26,234	26,369	27,464	32,597	39,887	48,581
7	8,799	9,070	9,699	10,321	10,931	10,987	11,443	13,582	16,620	20,242
TOTALS	175,979	181,402	193,982	206,411	218,619	219,738	228,869	271,640	332,394	404,838

Sources: RECAP Tables 1, 2 and 3
Notes: Excludes expenditure on SFT

Table: **4**

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2008

Catchment Zone	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden prdcts (£000)	Chemists, medcl & beauty goods (£000)	All other comprsn gds (£000)	Total comprsn gds (£000)
1	17,753	4,360	5,124	2,713	8,578	6,743	9,677	17,566	72,513
2	15,601	3,832	4,503	2,385	7,538	5,926	8,504	15,437	63,724
3	3,766	925	1,087	576	1,820	1,430	2,053	3,726	15,382
4	2,690	661	776	411	1,300	1,022	1,466	2,662	10,987
5	4,842	1,189	1,397	740	2,339	1,839	2,639	4,791	19,776
6	6,456	1,586	1,863	987	3,119	2,452	3,519	6,388	26,369
7	2,690	661	776	411	1,300	1,022	1,466	2,662	10,987
TOTALS	53,798	13,213	15,526	8,223	25,994	20,435	29,324	53,231	219,738

Sources: RECAP Tables 1 and 2
Notes: Excludes expenditure on SFT

Scenario 1

St Helier Town Centre

Table: **5**

CONVENIENCE GOODS MARKET SHARES IN 2008

2008 Allocations to

St Helier Town Centre

Indicated by Household Interview Survey

Zones	Main Food Q2	Top-up convenience Q4	**WEIGHTED AVERAGE**
	Expenditure weighting		
	80	20	100
	(%)	(%)	(%)
1	56.8	52.0	55.8
2	27.4	18.3	25.6
3	28.5	7.8	24.4
4	20.7	8.3	18.2
5	2.9	3.9	3.1
6	5.5	3.9	5.2
7	17.2	14.6	16.7

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **6**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2008

2008 Allocations to

St Helier Town Centre

Indicated by Household Interview Survey

Zones	Clothing & footwear Q5	Furniture/ florcvrgs etc Q6	Household Textiles Q7	Household Appliances Q8	Audio-visual equipment Q9	Hardware, DIY, garden products Q10	Chemists, medcl & beauty goods Q11	All other comparison gds Q12	**WEIGHTED AVERAGE**
	Expenditure weighting								
	592.49	145.52	171.00	90.56	286.27	225.05	322.96	586.24	2,420.08
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	87.5	74.6	83.7	76.6	76.6	50.4	92.3	93.7	83.5
2	88.8	70.0	87.8	70.4	84.1	43.9	81.9	95.9	83.0
3	82.4	85.2	85.0	80.9	85.9	40.9	71.2	93.3	80.4
4	82.1	72.3	80.0	61.4	76.4	42.1	66.1	88.9	75.7
5	81.3	77.1	86.2	77.7	78.8	46.5	50.5	87.2	75.0
6	82.7	78.1	80.4	67.6	78.0	31.9	32.5	93.1	72.2
7	84.5	72.9	73.3	70.9	77.9	38.8	71.4	96.0	78.5

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **7**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **St Helier Town Centre**

Baseline - No change in market shares from those indicated by the Household Interview Survey 2008.

Market shares correction factors:	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	100	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2010 (%)	2015 (%)	2020 (%)	2025 (%)	2008 (%)	2010 (%)	2015 (%)	2020	2025 (%)
1	56	56	56	56	56	83	83	83	83	83
2	26	26	26	26	26	83	83	83	83	83
3	24	24	24	24	24	80	80	80	80	80
4	18	18	18	18	18	76	76	76	76	76
5	3	3	3	3	3	75	75	75	75	75
6	5	5	5	5	5	72	72	72	72	72
7	17	17	17	17	17	79	79	79	79	79

Sources: RECAP Model.
DTZ for market share corrections.

Table: **8**

COMPARISON GOODS SALES BY GOODS TYPE IN 2008

Catchment Zones	2008 Sales in **St Helier Town Centre** By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	15,534	3,253	4,289	2,079	6,571	3,399	8,932	16,459
2	13,854	2,682	3,953	1,679	6,340	2,602	6,965	14,804
3	3,103	788	924	466	1,563	585	1,462	3,476
4	2,208	478	621	252	993	430	969	2,366
5	3,936	917	1,205	575	1,843	855	1,333	4,178
6	5,339	1,238	1,498	667	2,433	782	1,144	5,947
7	2,273	482	569	291	1,012	396	1,047	2,555
TOTALS	46,248	9,837	13,058	6,009	20,755	9,049	21,851	49,786
MARKET SHARES	86.0%	74.5%	84.1%	73.1%	79.8%	44.3%	74.5%	93.5%

Sources: RECAP Model.
Notes:

Table: **9**

FORECAST RETAIL SALES

Scenario: 1 Location: **St Helier Town Centre**

Baseline - No change in market shares from those indicated by the Household Interview Survey 2008.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (£000)	2010 (£000)	2015 (£000)	2020 £0	2025 (£000)	2008 (£000)	2010 (£000)	2015 (£000)	2020 £0	2025 (£000)
1	32,521	33,523	35,848	38,145	40,401	60,186	62,687	74,402	91,043	110,885
2	13,269	13,678	14,626	15,563	16,484	52,891	55,089	65,384	80,007	97,444
3	2,956	3,048	3,259	3,468	3,673	12,305	12,817	15,212	18,614	22,671
4	1,584	1,633	1,746	1,858	1,968	8,350	8,697	10,322	12,631	15,384
5	475	490	524	557	590	14,832	15,449	18,336	22,437	27,327
6	1,056	1,088	1,164	1,238	1,312	18,985	19,774	23,470	28,719	34,978
7	1,496	1,542	1,649	1,754	1,858	8,680	9,040	10,730	13,130	15,991
TOTALS	53,357	55,001	58,815	62,584	66,285	176,230	183,553	217,855	266,580	324,680

Sources: RECAP Model.

Table: **10**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2008

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Fresh Food Locale (Co-op), Charing Cross, St Helier	342	95	325	6,282	2,041
Checkers Xpress, Bath Street, St Helier	1,050	95	998	10,007	9,982
Marks & Spencer, King Street, St Helier	n/a	n/a	860	12,013	10,331
Spar, Union Street, St Helier	450	95	428	6,282	2,686
Central & Beresford Markets	2,800	N/A	1,750	5,000	8,750
Other Convenience Goods Shops in St Helier TC	2,313	95	2,197	6,000	13,184
ALL STORES	6,955		6,557	7,164	46,974

Sources: DTZ survey, Department of Planning and Environment, Jersey Co-operative Society, Verdict Research.

Table: **11**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Former CO-OP Homemaker store, Don Street, St Helier	465	95	442	6,282	2,775
Checkers supermarket at Liberty Wharf	350	100	350	6,282	2,199
ALL STORES	815		792	6,282	4,974

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Liberty Wharf	4,037	75	3,028	5,000	15,139
ALL STORES AND SCHEMES	4,037		3,028	5,000	15,139

Sources: DTZ, based on Verdict Research and Retail Rankings. Jersey Co-operative Society.
Notes:

Table: **12**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **St Helier Town Centre**

Baseline - No change in market shares from those indicated by the Household Interview Survey 2008.

Growth in sales per sq m from shop floorspace existing in 2008 Comparison Goods: 1.50 % pa to 2025

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2010	2015	2020	2025	2008	2010	2015	2020	2025
Residents' Spending £000	53,357	55,001	58,815	62,584	66,285	176,230	183,553	217,855	266,580	324,680
Plus visitors' spending (%)	7.5	7.5	7.5	7.5	7.5	20.0	20.0	20.0	20.0	20.0
Total spending (£000)	57,358	59,126	63,226	67,278	71,257	211,476	220,263	261,426	319,896	389,616
Existing shop floorspace (sq m net)	6,557	6,357	6,357	6,357	6,357	51,512	49,328	49,328	49,328	49,328
Sales per sq m net (£)	8,747	7,164	7,164	7,164	7,164	4,105	4,229	4,556	4,908	5,288
Sales from extg flrspce (£000)	57,358	45,541	45,541	45,541	45,541	211,476	208,630	224,754	242,124	260,836
Available spending to support new shops (£000)	0	13,585	17,685	21,736	25,716	0	11,633	36,672	77,772	128,779
Less sales capacity of committed new floorspace (£000)	0	4,974	4,974	4,974	4,974	0	15,139	16,309	17,569	18,927
Net available spending for new shops (£000)	0	8,611	12,712	16,763	20,742	0	(3,506)	20,363	60,203	109,853
Sales per sq m net in new shops (£)	13,000	13,000	13,000	13,000	13,000	5,000	5,151	5,549	5,978	6,440
Capacity for new shop flrspc (sq m net)	**0**	**662**	**978**	**1,289**	**1,596**	**0**	**(681)**	**3,670**	**10,071**	**17,058**

Market Share of Catchment Area Expenditure	30.3%	30.3%	30.3%	30.3%	30.3%	80.2%	80.2%	80.2%	80.2%	80.2%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 1

Non-central Shopping in Jersey

Table: **13**

CONVENIENCE GOODS MARKET SHARES IN 2008

2008	Allocations to		
Non-central Shopping in Jersey Indicated by Household Interview Survey			
Zones	Main Food Q2	Top-up convenience Q4	**WEIGHTED AVERAGE**
	Expenditure weighting		
	80	20	100
	(%)	(%)	(%)
1	40.4	19.1	36.1
2	61.9	46.9	58.9
3	54.5	22.1	48.0
4	79.3	66.7	76.8
5	90.2	46.6	81.5
6	92.9	75.8	89.5
7	71.3	34.8	64.0

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **14**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2008

	2008 Allocations to **Non-central Shopping in Jersey** Indicated by Household Interview Survey								
	Clothing & footwear Q5	Furniture/ florcvrgs etc Q6	Household Textiles Q7	Household Appliances Q8	Audio-visual equipment Q9	Hardware, DIY, garden products Q10	Chemists, medcl & beauty goods Q11	All other comparison gds Q12	**WEIGHTED AVERAGE**
Zones	Expenditure weighting								
	592.49	145.52	171.00	90.56	286.27	225.05	322.96	586.24	2,420.08
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	2.8	19.0	10.4	22.7	21.0	46.0	7.1	4.1	12.1
2	1.0	20.6	6.9	26.2	12.7	51.0	12.8	0.5	11.0
3	2.9	7.4	3.3	14.7	4.7	51.5	6.8	0.0	8.2
4	3.6	10.6	11.1	35.1	18.2	57.9	30.5	3.7	16.1
5	8.3	18.1	6.9	20.2	16.5	50.5	48.5	6.4	19.0
6	9.1	13.5	12.7	29.6	19.0	58.0	63.3	2.0	21.6
7	8.3	25.4	16.9	25.3	20.6	57.5	21.4	1.3	16.7

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **15**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Non-central Shopping in Jersey**

Baseline - No change in market shares from those indicated by the Household Interview Survey 2008.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2010 (%)	2015 (%)	2020 (%)	2025 (%)	2008 (%)	2010 (%)	2015 (%)	2020 (%)	2025 (%)
1	36	36	36	36	36	12	12	12	12	12
2	59	59	59	59	59	11	11	11	11	11
3	48	48	48	48	48	8	8	8	8	8
4	77	77	77	77	77	16	16	16	16	16
5	81	81	81	81	81	19	19	19	19	19
6	89	89	89	89	89	22	22	22	22	22
7	64	64	64	64	64	17	17	17	17	17

Sources: RECAP Model.
DTZ for market share corrections.

Table: **16**

COMPARISON GOODS SALES BY GOODS TYPE IN 2008

Catchment Zones	2008 Sales in	Non-central Shopping in Jersey						
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	497	828	533	616	1,801	3,102	687	720
2	151	789	311	625	957	3,022	1,089	77
3	109	68	36	85	86	737	140	0
4	97	70	86	144	237	592	447	98
5	402	215	96	149	386	929	1,280	307
6	587	214	237	292	593	1,422	2,227	128
7	223	168	131	104	268	587	314	35
TOTALS	2,067	2,353	1,430	2,015	4,327	10,391	6,184	1,365
MARKET SHARES	3.8%	17.8%	9.2%	24.5%	16.6%	50.9%	21.1%	2.6%

Sources: RECAP Model.

Notes:

Table: **17**

FORECAST RETAIL SALES

Scenario: 1 Location: **Non-central Shopping in Jersey**

Baseline - No change in market shares from those indicated by the Household Interview Survey 2008.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (£000)	2010 (£000)	2015 (£000)	2020 £0	2025 (£000)	2008 (£000)	2010 (£000)	2015 (£000)	2020 £0	2025 (£000)
1	20,906	21,551	23,045	24,522	25,972	8,702	9,063	10,757	13,163	16,032
2	30,110	31,038	33,190	35,317	37,406	7,010	7,301	8,665	10,603	12,914
3	5,913	6,095	6,518	6,935	7,346	1,231	1,282	1,521	1,861	2,267
4	6,775	6,984	7,468	7,947	8,417	1,758	1,831	2,173	2,659	3,239
5	12,829	13,224	14,141	15,047	15,937	3,758	3,914	4,645	5,684	6,923
6	18,795	19,374	20,717	22,045	23,349	5,801	6,042	7,171	8,775	10,688
7	5,631	5,805	6,207	6,605	6,996	1,868	1,945	2,309	2,825	3,441
TOTALS	100,959	104,070	111,287	118,418	125,422	30,126	31,378	37,242	45,571	55,503

Sources: RECAP Model.

Table: **18**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2008

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op - Locale, La Route De Beaumont, St Peter	340	95	323	6,282	2,029
M&S, La Grande Route de St. Pierre, St.Peters	216	95	205	12,013	2,465
Co-op, La Route Des Quennevais, St Brelade	325	95	309	6,282	1,940
Checkers Xpress, La Route Des Quennevais, St Brelade	450	90	405	6,282	2,544
M&S, La Route des Issues, St.John	300	95	285	12,013	3,424
CO-OP Locale, Georgetown, St Clement	377	95	358	6,282	2,250
Checkers Xpress, La Neuve Route, St Aubin	383	95	363	6,282	2,283
M&S Simply Food (Le Squez), School Road, St Clement	455	95	432	12,013	5,193
M&S Simply Food, La Route des Genets, St Brelade	180	95	171	12,013	2,054
Grand Marche CO-OP, La Rue le Masurier, St.Helier	2,445	85	2,078	10,007	20,797
Checkers, La Marquanderie, St Brelade	1,710	85	1,454	10,007	14,545
Safeway, Les Vallee Des Vaux, St Saviour	1,350	85	1,148	10,007	11,483
Co-op, La Route De L'Eglise, St Peter	1,500	90	1,350	10,007	13,509
Checkers, La Rue Des Pres, St.Saviour/St Clements	1,950	75	1,463	10,007	14,635
Other Local Food Stores	2,633	95	2,501	6,282	15,713
ALL STORES	14,614		12,845	8,942	114,865

Sources: DTZ survey, Department of Planning and Environment, Jersey Co-operative Society, Verdict Research.

Notes: Does not include farm shops and other isolated convenience goods shops; which are also not included in the market shares in Tables 13 and 15, for internal consistency of the Model.

Table: **19**

SALES CAPACITY OF EXISTING RETAIL WAREHOUSES & SUPERSTORES*

Net to gross ratio: 85 %   Date of sales densities: 2004

Store	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density 2004 (£per sqm net)	Sales 2004 (£000)
Carpetright, St. Peter	3,438	2,922	1,156	3,378
Computer Shop, St Peters (1)	456	388	4,000	1,550
B & Q, Queens Road. JE2 3AP (2)	4,325	3,893	1,905	7,415
JE Store, Queens Road. JE2 3AP	N/A	2,900	2,709	7,857
Morton & Morton, La Grande Route De St Pierre. JE3 7AZ	870	740	2,000	1,479
Marks & Spencer, La Route Des Genets. JE3 8LB	480	408	4,246	1,732
Marks & Spencer - Above Checkers, La Marquanderie. JE3 8DA	759	645	4,246	2,739
Grand Marche CO-OP, La Rue le Masurier, St.Helier	N/A	367	4,500	1,650
Checkers, La Marquanderie, St Brelade	N/A	257	4,500	1,154
Safeway, Les Vallee Des Vaux, St Saviour*	N/A	203	4,500	911
Co-op, La Route De L'Eglise, St Peter	N/A	150	4,500	675
Checkers, La Rue Des Pres, St.Saviour/St Clements	N/A	488	4,500	2,194
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns	10,328	13,358	**2,451**	32,736

Sources: Retail Rankings', Mintel, with VAT added for compatibility with expenditure.
DTZ. Verdict Research.

Notes:
* Comparison goods floorspace in the five largest foodstores
(1) Sales density allows for exclusion of some trade, i.e. non-retail sales.
(2) 5,403 sq m gross, but 20% of floorspace excluded to allow for trade i.e. non-retail sales. 90% net to gross assumed.

Table: **20**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Grand Marche CO-OP, La Rue le Masurier, St.Helier	232	95	220	10,007	2,206
Checkers, La Rue Des Pres, St Saviour - additional food space	465	100	465	10,007	4,653
ALL STORES	697		685	10,007	6,859

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Grand Marche CO-OP, La Rue le Masurier, St.Helier	N/A	N/A	2,323	3,000	6,969
Retail Warehouse, La Rue Des Pres, St Saviour	1,394	85	1,185	2,500	2,962
ALL STORES AND SCHEMES	1,394		**3,508**	2,831	**9,931**

Sources: DTZ, based on Verdict Research and Retail Rankings. Sandpiper for Checkers extension floorspace.
Notes: Extension of Grand Marche is for Co-op Homemaker store moving from St Helier Town Centre

Table: **21**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Non-central Shopping in Jersey**

Baseline - No change in market shares from those indicated by the Household Interview Survey 2008.

Growth in sales per sq m from shop floorspace existing in 2008 Comparison Goods: 1.50 % pa to 2025

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2010	2015	2020	2025	2008	2010	2015	2020	2025
Residents' Spending £000	100,959	104,070	111,287	118,418	125,422	30,126	31,378	37,242	45,571	55,503
Plus visitors' spending (%)	4.0	4.0	4.0	4.0	4.0					
Total spending (£000)	104,997	108,233	115,739	123,155	130,439	30,126	31,378	37,242	45,571	55,503
Existing shop floorspace (sq m net)	12,845	12,845	12,845	12,845	12,845	13,358	13,358	13,358	13,358	13,358
Sales per sq m net (£)	8,174	8,942	8,942	8,942	8,942	2,255	2,680	2,887	3,110	3,350
Sales from extg flrspce (£000)	104,997	114,865	114,865	114,865	114,865	30,126	35,795	38,561	41,541	44,752
Available spending to support new shops (£000)	0	(6,631)	874	8,290	15,574	0	(4,417)	(1,319)	4,030	10,752
Less sales capacity of committed new floorspace (£000)	0	6,859	6,859	6,859	6,859	0	9,931	10,699	11,526	12,416
Net available spending for new shops (£000)	0	(13,490)	(5,984)	1,431	8,715	0	(14,348)	(12,018)	(7,495)	(1,665)
Sales per sq m net in new shops (£)	13,000	13,000	13,000	13,000	13,000	3,000	3,091	3,330	3,587	3,864
Capacity for new shop flrspc (sq m net)	**0**	**(1,038)**	**(460)**	**110**	**670**	**0**	**(4,642)**	**(3,609)**	**(2,090)**	**(431)**

Market Share of Catchment Area Expenditure	57.4%	57.4%	57.4%	57.4%	57.4%	13.7%	13.7%	13.7%	13.7%	13.7%

Sources: RECAP Model. DTZ estimates.

Notes:

Total Market Shares

Excluding local shops in St Helier not covered by the Experian Goad plan, farm shops and other isolated shops.

Table: **22**

TOTAL MARKET SHARES BY COMPARISON GOODS TYPE IN 2008

SHOPPING LOCATION	COMPARISON GOODS TYPE							
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY & garden goods	Chemists, medical & beauty goods	All other comparison goods
St Helier Town Centre	86%	74%	84%	73%	80%	44%	75%	94%
Non-central Shopping in Jersey	4%	18%	9%	25%	17%	51%	21%	3%
TOTALS JERSEY	**90%**	**92%**	**93%**	**98%**	**96%**	**95%**	**96%**	**96%**

Sources: RECAP Model

Notes: The difference between these market shares and 100% is accounted for by the excluded shopping formats indicated in the title, together with off-island shopping.

Table: **23**

Scenario: **1**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Jersey

Catchment Zones	St Helier Town Centre and Non-Central Foodstores and Retail Warehouses									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2010 (%)	2015 (%)	2020 (%)	2026 (%)	2008 (%)	2010 (%)	2015 (%)	2020 (%)	2026 (%)
1	92	92	92	92	92	95	95	95	95	95
2	85	85	85	85	85	94	94	94	94	94
3	72	72	72	72	72	88	88	88	88	88
4	95	95	95	95	95	92	92	92	92	92
5	84	84	84	84	84	94	94	94	94	94
6	94	94	94	94	94	94	94	94	94	94
7	81	81	81	81	81	96	96	96	96	96

Sources: RECAP Model