

**WRITTEN QUESTION TO MINISTER FOR PLANNING AND ENVIRONMENT BY DEPUTY G.P.
SOUTHERN OF ST. HELIER**

ANSWER TO BE TABLED ON TUESDAY 1st JULY 2008

Question

1. The DTZ report into a potential third supermarket refers to “*projections for 15 years from 2009 for each of the population growth scenarios that the States of Jersey are now considering*”, would the Minister state whether these scenarios are the same as those referred to during the ‘Imagine Jersey’ exercise and whether they refer to a range of up to 625 heads of household or up to 625 inward migrants?

Answer

The DTZ study is not a report on the potential for a third supermarket. DTZ were commissioned to review the adequacy of the all retail provision **across all sectors** in the Island as part of the Island Plan Review and aimed at answering the following questions:

- How much new retail development of each principal type will be supportable on the Island by growth in population and retail expenditure in future years;
- Where on the Island should it be located and in what commercially realistic formats.

This report is yet to be completed and is expected to be available in mid-July following the publication of the Island Plan Strategic Options - Green paper.

This research is a land use planning study based on a number of assumptions over the period of the Plan. It specifically addresses capacity issues and looks at the amount of floorspace in the Island relative to expected trends in expenditure. It does not address wider issues about the need for competition, the structure of the retail market and how the retail sector contributes to the Island’s economic objectives of economic growth and low inflation.

In order to carry out this work it was necessary to forecast longer term expenditure patterns (up to 2025) on the Island. DTZ were provided with information from the statistics unit on current population levels including future growth scenarios, based on population modelling work and the 2007 Housing Needs Survey. In addition, they conducted a Household Interview Survey of existing shopping patterns on the Island.

The planning assumption made in the 2002 Island Plan was a net in-migration level of 200 heads of households per annum (the actual average since 2002 has been just below 200 h/h per annum). Taking account of population modelling for Imagine Jersey, it was considered appropriate to adopt - purely as a planning assumption in the preparation of the Island plan review - the +250 heads of households per annum (540 people) scenario. And it is this that has been used to assess the capacity levels for the retail analysis. This is not an endorsement of any particular figure as this will be a decision of the States.

Question

2. Could the Minister state whether the report will address the estimated size of the workforce required for a potential third supermarket operator and, if so, is he able to advise what size would that be? Does the report also cover displacement effects in assessing the workforce implications of a third entrant?

Answer

The final report is not yet complete, however the brief for the study did not cover assessment of the workforce

implications of a third supermarket entrant, nor any potential workforce displacement effects should one enter the market.