

2017



Geo Business Seminar



WELCOME

Presentation title

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Content

- Introduction
- Retail city profile Amsterdam
- Competitor analyses
 - Starbuck vs. Coffee Company
- Gravity model





Introduction | JLL

A global real estate advisory firm (top three world wide)



Americas
94 offices

Europe Middle East
80 offices

Asia Pacific
66 offices

- Present in the Dutch market since 1969;
- We have three offices spread across the main regional markets of the country;
- Currently over 200 people are employed at JLL in the Netherlands;
- Full service real estate advisory firm.



Retail City Profile | Amsterdam

- Kalverstraat has the highest rent level in the Netherlands € 2,950
- Expansion in Amsterdam is both in luxury and discount segment
- Flagship stores set the tone in the Amsterdam retail market.
- In addition, the Canadian department store Hudson's Bay is opening its first store in the Netherlands, at Rokin.

Key retail entrants

Boggi Milano
Stone Island
Primark
Philipp Plein

- Nespresso
- Snipes
- Colourful Rebel
- Hudson's Bay



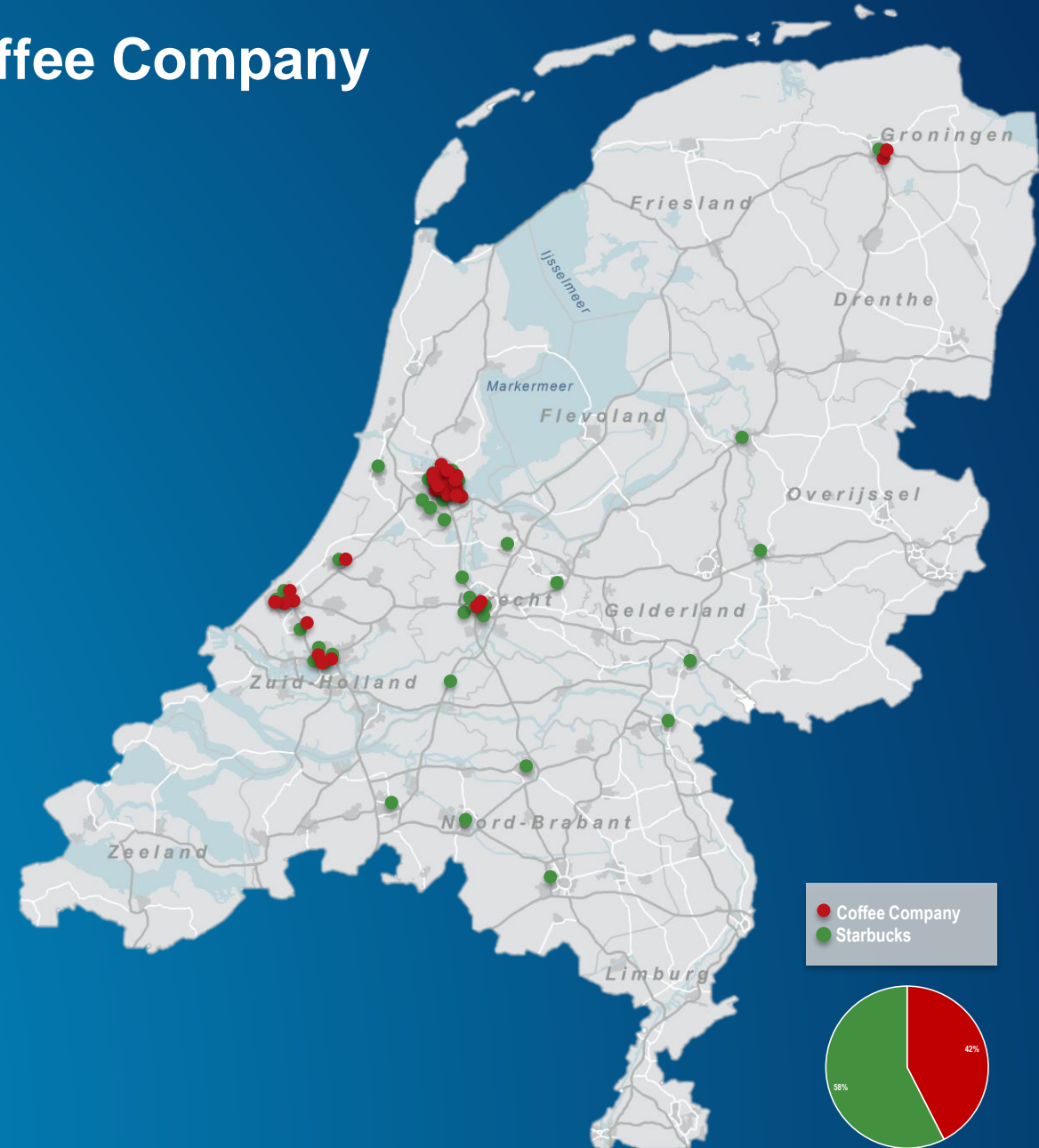
Competitor Analysis | Starbucks vs. Coffee Company

Coffee Company

- 71% of the Coffee Companies in the Netherlands are located in inner-city shopping areas;
- 32 out of 34 Coffee Companies are located in the Randstad – with 21 stores located in Amsterdam;

Starbucks

- There are a total of 46 Starbucks stores in the Netherlands vs. 34 Coffee Companies;
- 48% of the Starbucks stores in the Netherlands are located in inner-city shopping areas;
- 58% of the Starbucks stores are located in the Randstad, with 15 stores (32%) located in Amsterdam;



Gravity-model | What, how and who?

- Commonly used methodology to determine the odds of a consumer from location i to be shopping at location j
- Despite gravitation models being commonly used across the globe, this methodology has hardly found its way to the Netherlands
- JLL now has the capabilities to put the model into practice, estimating the domestic consumer base and potential turnover of a single store or a shopping centre



Gravity-model | What, how and who?

- Next to modelling existing stores, their potential and estimating the consumer base, the model enables us to model potential new stores too;
- An example, which looks at the potential to develop three new supermarkets in a Retail Warehousing location, was conducted for a client;
- The outcome showed that the three potential supermarkets (6,300 sq m in total), could potentially reach a turnover of € 10.3 - € 11.9 million;
- Based on this outcome, the location has proven not to be sufficient for three supermarkets.



A horizontal banner image featuring a city skyline at dusk or dawn, with buildings and a bridge visible. The image is overlaid with a complex geometric pattern of yellow and blue hexagons and lines, some of which contain faint map-like details.

Thank you

Inspired? Join us!
We are currently looking for a GIS Analyst.

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SCIENCE
OF
WHERE