



5.8 Future Shopping Behaviour

Respondents were asked "If such a shopping centre was built, containing all the shops and services that we have discussed, what proportion of your household expenditure on the following categories do you think would go to the new centre, how much would remain with the stores you presently use in Hermanus or your local area and how much would go over the mountain?"

The results show insignificant additional spend in Hermanus by Primary area residents on Food and Restaurants, but some 25% additional expenditure on clothing and 38% on furniture and appliances. Amongst the Secondary area residents there is a substantial change in claimed expenditure distribution, with all categories rising from around 15-20% spend in Hermanus to between 56% and 61%. These changes all reflect increases of above 100%.

The results of the Household survey confirmed that the greater Hermanus area should be considered as the Primary catchment area and the Secondary catchment area should include Kleinmond and Betty's Bay as well as Stanford and Gansbaai, Caledon and parts of the Theewaterskloof area and the bulk of the L'agulhas district.



6. RETAIL CENSUS

All retail stores within the Overstrand area as well as Caledon, Napier and Bredasdorp were listed, and estimates made of their floor space, the allocation of space by major merchandise group, their overall business quality and the likely contribution of tourism and non-retail customers. No interviews were carried out, and the estimates were made by a senior Researcher with extensive experience in this field. Nonetheless, no claims are made as to the accuracy of individual measurements or ratings, and the information is intended as a broad guideline in the macro context.

6.1 Greater Study Area Retail

The total amount of retail space in the greater study area is close to 209,000m², of which some 9% is vacant. The bulk of the space is devoted to Consumer Services, followed by Other Retail Goods, then Food and Groceries. There is relatively little space devoted to Clothing and Footwear, and even less to Furniture and Appliances.

PRODUCT GROUP	Gross Sqm	Sales Rm	No of Stores
Food & Groceries	39 370	1 450	194
Clothing & Footwear	19 130	330	142
Furniture & Appliances	11 130	114	81
Other Retail Goods	54 050	630	411
Consumer Services	65 570	570	565
Vacant	19 470		114
Total	208 710	3 100	1507

Within the greater study area, Hermanus is by far the biggest town, 3 times bigger than the next contender at nearly 100,000 square metres. Hermanus accounts for 47% of the total retail space in the region



Greater Study Area Retail by Town

Town	Gross Sqm	Sales Rm	No of Stores
Hermanus	98 450	1510	639
Kleinmond	28 740	393	143
Bredasdorp	27 640	392	227
Gansbaai	18 830	258	196
Caledon	17 150	264	138
Stanford	7 890	76	61
Betty's Bay	7 200	76	40
Total	208 710	3005	1492

6.2 Hermanus Area Retail

The total amount of retail space in the Hermanus area is over 98 000m², of which some 7% is vacant. The bulk of the space is devoted to Consumer Services, followed by Other Retail Goods, then Food and Groceries. There is relatively little space devoted to Clothing and Footwear, and even less to Furniture and Appliances.

PRODUCT GROUP	Gross Sqm	Sales Rm	No of Stores
Food & Groceries	17 880	722	70
Clothing & Footwear	10 690	192	74
Furniture & Appliances	6 690	69	43
Other Retail Goods	24 600	303	197
Consumer Services	31 190	279	245
Vacant	19 470		28
Total	98 450	1 565	657

Within the Hermanus area, the CBD is by far the biggest retail precinct, accounting for 62% of the retail space in the area, and 64% of the sales

**Hermanus Area Retail by Town**

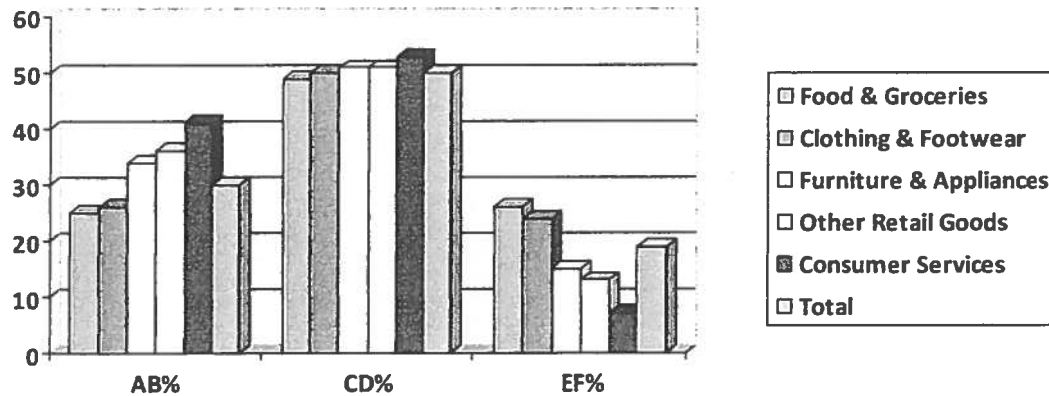
Town	Gross Sqm	Sales Rm	No. of Stores
Hermanus CBD	61 180	996	394
Gateway Centre	7 180	190	47
Industrial Area 1	12 170	172	96
Industrial Area 2	2 090	21	26
Hemel en Aarde	5 450	59	23
Sandbaai	5 680	55	30
Onrus	4 700	73	46
Total	98 452	1 565	657

6.3 Life Plane Profile

As part of the census process we estimated the likely Life plane profile of each business in order to assist reconciliation with the demographic analysis. The table below shows the overall profile emerging for Hermanus town.

Life Plane profile of the Retail business in Hermanus

PRODUCT GROUP	AB%	CD%	EF%
Food & Groceries	25	49	26
Clothing & Footwear	26	50	24
Furniture & Appliances	34	51	15
Other Retail Goods	36	51	13
Consumer Services	41	53	7
Total	30	50	19



6.4 Tourism

Estimates were also made store by store as to the likely contribution made by tourism. These were subjective estimates, made again to assist in reconciling the demand and supply side metrics.

The table below shows our estimate that tourism presently contributes about 16% to the total retail spend in Hermanus

Tourism Contribution by Product Group

PRODUCT GROUP	Tourism%
Food & Groceries	14.3
Clothing & Footwear	15.4
Furniture & Appliances	7.3
Other Retail Goods	15.4
Consumer Services	22.4
Total	15.8