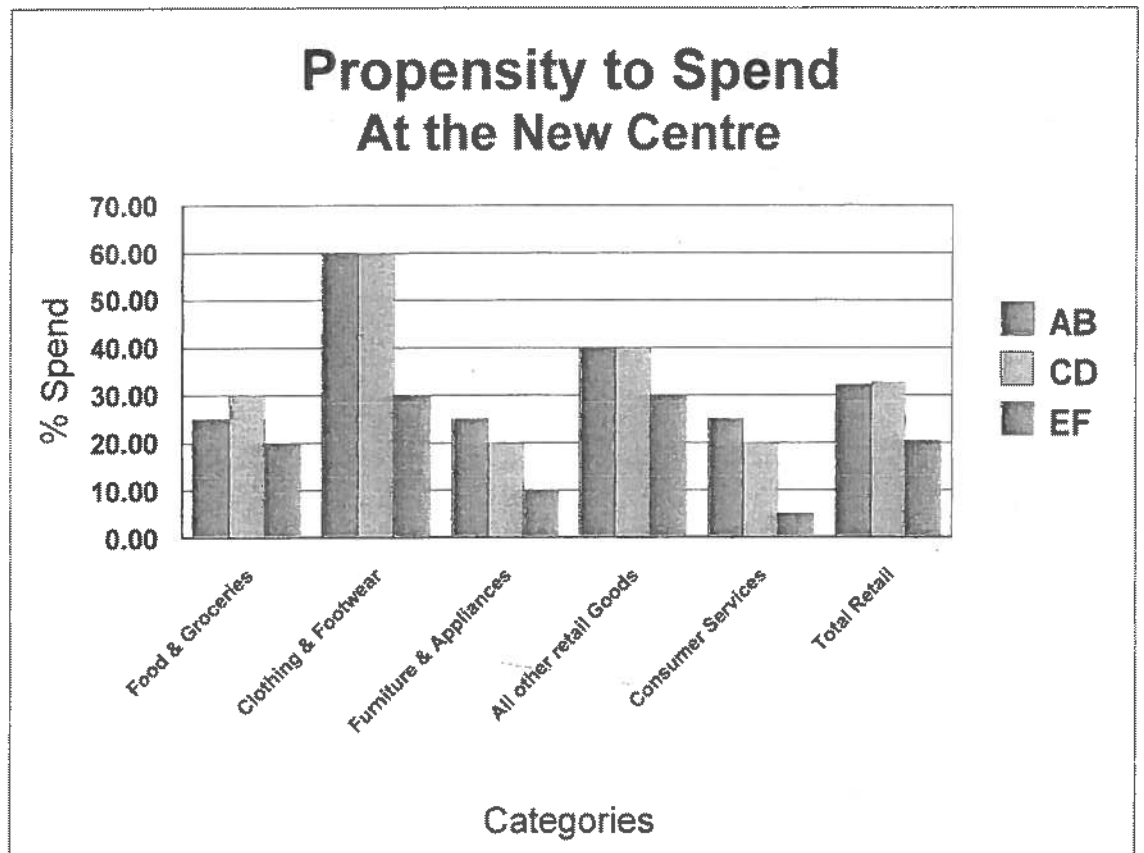


7. Propensity to Spend at the New Centre

Not all the shoppers will spend all their money at the new shopping centre. As the Consumer Survey showed, people will continue to support the existing stores both in Hermanus CBD as well as their local areas. The table below shows the estimated level of support the new centre is likely to draw by Lifeplane and catchment area.

Propensity to Spend at the New Centre

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
Food & Groceries	25.00	30.00	20.00	7.00	7.00	0.00	5.00	5.00
Clothing & Footwear	60.00	60.00	30.00	40.00	40.00	10.00	30.00	30.00
Furniture & Appliances	25.00	20.00	10.00	20.00	20.00	5.00	5.00	5.00
All other retail Goods	40.00	40.00	30.00	30.00	30.00	10.00	30.00	30.00
Consumer Services	25.00	20.00	5.00	10.00	10.00	5.00	10.00	10.00
Total Retail	32.14	32.60	20.40	17.33	16.96	3.69	13.17	13.02



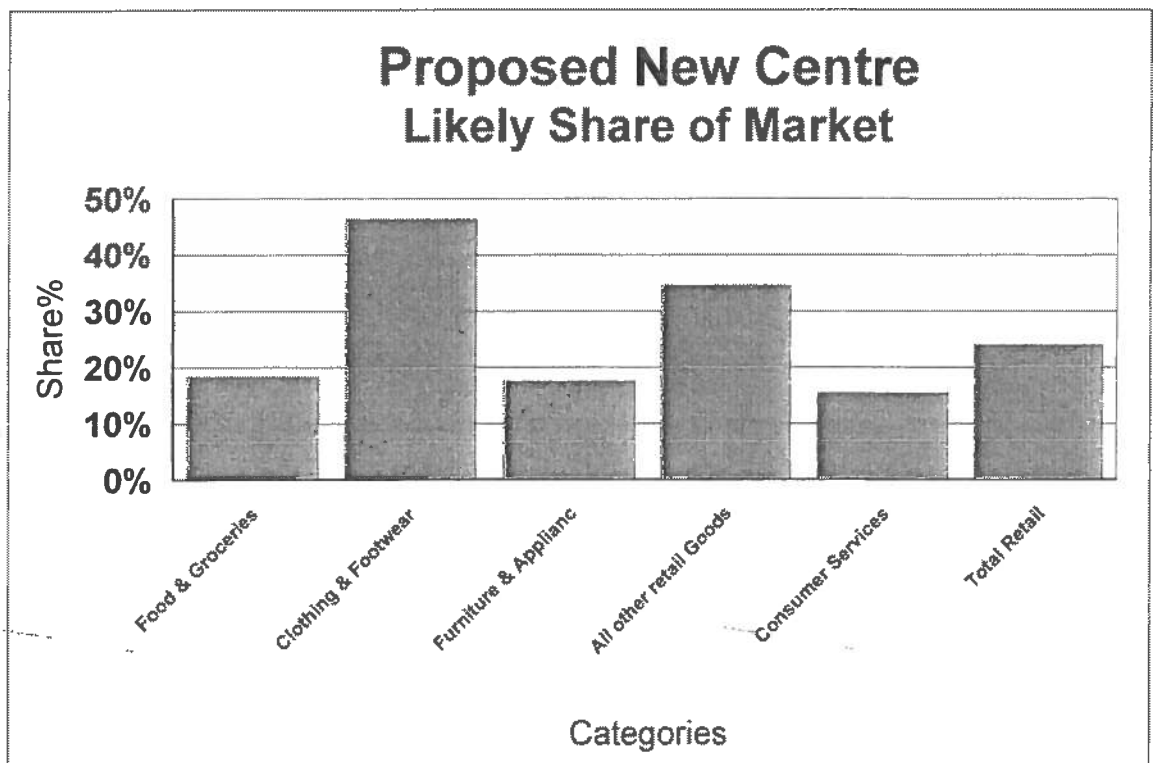
8. Market Potential 2011

The number of shoppers times their average expenditure by product group times the propensity to spend at the centre gives us the potential market for the centre, which is shown in the table below.

New Centre: Market Potential 2011
R' Million

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
Food & Groceries	54.32	108.21	30.36	7.30	14.95	0.00	0.23	0.45
Clothing & Footwear	43.78	63.48	11.47	13.22	25.06	0.22	0.46	0.67
Furniture & Appliances	20.28	22.60	2.08	7.37	13.38	0.07	0.09	0.16
All other retail Goods	35.04	49.44	11.30	11.93	21.96	0.23	0.56	1.04
Consumer Services	20.62	23.10	1.46	3.74	6.84	0.09	0.17	0.33
Total Retail	174.05	266.83	56.68	43.56	82.19	0.61	1.51	2.84

The new centre is likely to capture some 24% of the total retail potential of its shopping population. The graph following shows its potential market share by product category. As can be seen, the major category for the centre is Clothing and Footwear, followed by "All Other" goods, which includes many of the products stocked by a store like Game.



9. Market Potential Summary

The table below shows the overall development potential for a major "One - Stop" shopping centre in Hermanus from the present time through to 2024. The growth in development potential equates to about 3,2% per annum, slightly lower than the population growth projected for the area over that time. Converting the sales potential into warranted space requirements, we use a Trading Density estimate, which reflects the typical space productivity achievable by category in larger community or regional centres.

Hermanus Centre Summary of Development Potential						
Centre Market Potential	Term	2011	2013	2016	2019	2024
Food & Groceries	Rm	238	273	336	411	536
Clothing & Accessories	Rm	177	201	243	288	376
Furniture & Appliances	Rm	70	79	97	118	153
Other Goods	Rm	155	176	215	262	341
Consumer services	Rm	64	72	89	108	141
Total Retail Expenditure	Rm	704	801	981	1 188	1 548
Trading Densities	Term					
Food & Groceries	R/Sqm	54 140	56 940	62 340	67 970	78 510
Clothing & Accessories	R/Sqm	25 990	27 340	29 930	32 630	37 690
Furniture & Appliances	R/Sqm	18 950	19 930	21 820	23 790	27 480
Other Goods	R/Sqm	21 660	22 780	24 940	27 190	31 410
Consumer services	R/Sqm	17 320	18 220	19 950	21 750	25 120
Overall Trading density R/sq	R/Sqm	27 400	28 800	31 600	34 500	39 800
Warranted Floorspace	Term					
Food & Groceries	Sqm	4 403	4 791	5 388	6 052	6 826
Clothing & Accessories	Sqm	6 826	7 351	8 118	8 825	9 975
Furniture & Appliances	Sqm	3 672	3 971	4 460	4 959	5 581
Other Goods	Sqm	7 136	7 722	8 640	9 636	10 854
Consumer services	Sqm	3 672	3 978	4 469	4 988	5 629
Total Retail Space	Sqm	25 709	27 813	31 076	34 461	38 865

10. Detailed Model Tabulations

Detailed tables follow showing the structure of the market in 2011 and projections for each of the forecast years.

Hermanus Current

2011

27-Oct-11

Details	Primary				Secondary				Tourism	Total Inflow	Grand Total
	AB	CD	EF	Sub-Total	AB	CD	EF	Sub-Total			
Population	10 147	38 282	33 962	82 391	7 986	34 253	32 612	74 852	780	20 221	177 463
Economically Active (16-60) Ratio	54%	60%	65%	61%	58%	59%	63%	61%	60%	60%	61%
Economically Active Population	5 495	22 870	22 150	50 515	4 662	20 289	20 564	45 515	468	12 075	108 106
Non - Earners rate - % of Econ Active	-16%	20%	34%	22%	-28%	7%	21%	10%	19%	14%	52%
Earning Population	6 394	18 280	14 534	39 208	5 060	18 845	16 255	41 060	380	10 439	51 499
Average salary / wage	348 950	138 470	38 690	135 811	211 830	125 930	40 200	104 458	367 141	158 107	218 730
Total Income PA Rmillion	2 231.3	2 531.2	562.3	5 325	1 282.5	2 373.1	653.5	4 289	139	1 651	11 284
Per Capita Income	219 910	66 119	16 557	84 829	158 081	69 291	20 037	57 300	178 850	81 626	63 475
Household Size	3.3	3.9	4.8	4.1	3.4	3.9	4.7	4.1	3.3	3.6	4.1
Number of Households	3 081	9 908	7 133	20 122	2 335	8 640	6 937	18 112	237	5 567	43 801
Household Monthly Income	50 300	21 300	8 600	22 100	45 100	22 400	7 800	19 700	49 000	24 700	70 300
Household Annual Income	724 000	256 000	78 000	265 000	541 000	268 000	94 000	236 000	588 000	296 000	844 000
Propensity to shop at the Centre %	100	100	100	100	70	80	5	37	87	108	73
Shopping Population	10 147	38 282	33 962	82 391	5 590	20 552	1 831	27 773	882	20 122	130 286
Source of Shoppers	7.8%	29.4%	26.1%	83.2%	4.3%	15.8%	1.3%	21.3%	0.5%	15.4%	100.0%
Expenditure % of income											
Food & Groceries (formal)	10.25	15.80	27.00	14.28	11.80	15.00	25.00	20.49	13.59	14.62	16.04
Clothing & Accessories	3.44	4.40	5.80	4.25	3.74	4.40	6.30	6.14	4.64	4.12	4.74
Furniture & Appliances	3.83	4.70	3.70	4.23	4.17	4.70	3.68	6.59	3.93	4.57	4.90
Other Goods	3.83	5.14	6.70	4.75	4.50	5.14	6.50	7.23	5.59	5.03	5.45
Consumer services	3.89	4.80	5.20	4.46	4.24	4.80	5.00	6.75	5.26	4.74	5.11
Total Retail Expenditure	25.24	34.04	49.40	31.97	28.44	34.04	46.48	47.21	33.02	33.09	36.24
Per Capita Expenditure R/Pa											
Food & Groceries	22 541	9 918	4 470	9 227	18 654	10 392	5 009	11 739	24 286	11 937	10 181
Clothing & Accessories	7 570	2 909	1 126	2 748	5 912	3 048	1 262	3 520	8 298	3 380	3 007
Furniture & Appliances	8 416	3 108	813	2 733	6 588	3 256	737	3 779	7 015	3 730	3 110
Other Goods	8 416	3 399	1 109	3 073	7 114	3 581	1 302	4 144	9 988	4 108	3 461
Consumer services	8 557	3 176	861	2 884	6 698	3 327	1 002	3 869	9 403	3 872	3 247
Total Retail Expenditure	55 500	22 509	8 179	20 665	44 966	23 585	9 313	27 051	58 990	27 007	23 006
Total Market Potential Rm											
Food & Groceries	228.71	379.66	151.82	760.21	104.28	213.56	8.17	326.03	16.55	240	1 326
Clothing & Accessories	76.81	111.37	38.24	226.42	33.05	62.65	2.06	97.76	5.68	68	392
Furniture & Appliances	85.39	118.97	29.81	225.18	36.83	66.82	1.20	104.95	4.78	75	405
Other Goods	85.39	130.10	37.67	253.17	38.77	73.19	2.12	115.08	6.81	83	451
Consumer services	86.82	121.57	29.24	237.63	37.44	68.38	1.63	107.46	8.41	78	423
Total Retail Expenditure	563.13	861.69	277.78	1 702.80	251.37	484.72	15.19	751.28	40.21	543	2 997
Propensity to spend at the centre											
Food & Groceries	80	78	78	79	20	25	2	23	80	33	57
Clothing & Accessories	65	60	84	66	21	25	10	23	60	32	49
Furniture & Appliances	25	25	36	25	12	10	0	11	43	3	17
Other Goods	70	70	80	73	17	16	16	16	85	53	55
Consumer services	80	80	100	82	36	25	5	29	51	59	64
Total Retail Expenditure	68	68	79	70	21	22	5	21	69	36	51
Centre Market Potential Rm											
Food & Groceries	182.97	299.95	118.42	601.34	20.86	53.40	0.16	74.41	13.21	80	756
Clothing & Accessories	49.93	66.82	32.12	148.87	6.94	15.66	0.21	22.81	3.38	22	194
Furniture & Appliances	21.35	29.74	6.24	57.33	4.42	8.89	0.00	11.11	2.07	2	71
Other Goods	59.78	91.07	33.91	184.75	6.76	11.71	0.38	10.85	5.80	44	247
Consumer services	69.46	97.25	29.24	195.95	13.48	17.10	0.08	30.66	3.25	46	273
Total Retail Expenditure	383.46	504.84	219.93	1 168.25	52.46	104.56	0.83	157.85	27.70	194	1 540
Trading Densities R/Sqm											
Food & Groceries	43 320	43 320	43 320	43 320	43 320	43 320	43 320	43 320	43 320	43 320	43 320
Clothing & Accessories	20 790	20 790	20 790	20 790	20 790	20 790	20 790	20 790	20 790	20 790	20 790
Furniture & Appliances	15 160	15 160	15 160	15 160	15 160	15 160	15 160	15 160	15 160	15 160	15 160
Other Goods	17 320	17 320	17 320	17 320	17 320	17 320	17 320	17 320	17 320	17 320	17 320
Consumer services	12 990	12 990	12 990	12 990	12 990	12 990	12 990	12 990	12 990	12 990	12 990
Overall Trading density R/Sqm	22 800	23 500	24 700	23 494	20 700	23 700	19 800	22 561	23 308	21 287	23 100
Wanted Floorspace Rm											
Food & Groceries	4 224	6 924	2 734	13 881	481	1 233	4	1 718	305	1 854	17 453
Clothing & Accessories	2 402	3 214	1 545	7 161	334	753	10	1 097	162	1 056	9 314
Furniture & Appliances	1 488	1 962	412	3 782	282	441	0	733	136	136	4 651
Other Goods	3 451	5 258	1 958	10 667	390	676	22	1 089	335	2 525	14 280
Consumer services	5 347	7 487	2 251	15 085	1 838	1 316	6	2 360	250	3 552	20 997
Total Retail Space	16 832	24 845	8 899	50 576	2 535	4 420	42	6 966	1 189	9 124	66 896
Contribution by sector	25%	37%	13%	76%	4%	7%	0%	10%	2%	14%	100%

Hermanus Centre Market Potential

2011

Date 25-Oct-11

Details	Primary				Secondary				Tourism	Total Inflow	Grand Total
	AB	CD	EF	Sub-Total	AB	CD	EF	Sub-Total			
Population	10 147	38 282	33 962	82 391	7 986	34 253	35 532	77 772	900	19 939	180 102
Economically Active (16-60) Rat	54%	60%	65%	61%	58%	59%	63%	61%	60%	60%	61%
Economically Active Population	5 495	22 870	22 150	50 615	4 662	20 289	22 406	47 357	540	11 907	109 779
Non - Earners Rate (est)	-16%	20%	34%	22%	-28%	7%	21%	10%	18%	14%	52%
Earning Population	6 394	18 280	14 534	39 208	5 960	18 845	17 711	42 515	440	10 282	52 808
Average salary / wage	348 950	138 470	38 690	135 811	211 830	125 930	40 200	102 269	368 076	159 544	214 258
Total Income PA Rmillion	2 231.3	2 531.2	562.3	5 325	1 262.5	2 373.1	712.0	4 348	162	1 642	11 314
Per Capita Income	219 910	66 119	16 557	64 629	168 081	69 281	20 037	55 901	160 151	82 356	62 623
Household Size	3.3	3.9	4.8	4.1	3.4	3.9	4.7	4.2	3.9	3.7	4.1
Number of Households	3 081	9 908	7 133	20 122	2 335	8 640	7 558	18 734	229	5 449	44 305
Household Monthly Income	60 300	21 300	6 600	22 100	45 100	22 400	7 800	19 300	58 900	25 100	21 300
Household Annual Income	724 000	256 000	79 000	266 000	541 000	269 000	94 000	232 000	707 000	301 000	256 000
Propensity to shop at the Centre	95	95	100	97	70	60	5	36	86	99	71
Shopping Population	9 639	36 368	33 962	79 969	5 590	20 552	1 777	27 919	775	19 814	127 703
Source of Shoppers	7.5%	28.5%	26.6%	62.6%	4.4%	16.1%	1.4%	21.9%	0.6%	15.5%	100.0%
Expenditure % of Income											
Food & Groceries (total)	10.25	15.00	27.00	14.12	11.80	15.00	25.00	20.94	14.57	14.67	16.15
Clothing & Accessories	3.44	4.40	6.80	4.20	3.74	4.40	6.30	6.28	4.70	4.12	4.76
Furniture & Appliances	3.83	4.70	3.70	4.16	4.17	4.70	3.68	6.73	5.23	4.66	4.94
Other Goods	4.13	5.14	6.70	4.82	4.50	5.14	6.50	7.39	5.65	5.04	5.56
Consumer services	3.89	4.80	5.20	4.40	4.24	4.80	5.00	6.89	5.32	4.75	5.14
Total Retail Expenditure	25.54	34.04	49.40	31.69	28.44	34.04	46.48	48.22	35.47	33.24	36.56
Per Capita Expenditure R/Pa											
Food & Groceries	22 541	9 918	4 470	9 126	18 654	10 392	5 009	11 704	26 255	12 082	10 148
Clothing & Accessories	7 570	2 909	1 126	2 714	5 912	3 048	1 262	3 508	8 468	3 394	2 993
Furniture & Appliances	8 416	3 108	613	2 688	6 586	3 256	737	3 763	9 421	3 642	3 102
Other Goods	9 088	3 399	1 109	3 112	7 114	3 561	1 302	4 129	10 174	4 148	3 495
Consumer services	8 557	3 176	861	2 841	6 698	3 327	1 002	3 654	9 578	3 906	3 228
Total Retail Expenditure	56 172	22 509	8 179	20 481	44 966	23 585	9 313	26 958	63 896	27 373	22 966
Total Market Potential Rm											
Food & Groceries	217.28	360.70	151.82	729.79	104.28	213.58	8.93	326.76	20.35	239	1 296
Clothing & Accessories	72.97	105.80	38.24	217.01	33.05	62.65	2.24	97.94	8.56	67	382
Furniture & Appliances	81.12	113.02	20.81	214.95	36.83	66.92	1.31	105.06	7.30	76	396
Other Goods	67.61	123.60	37.67	248.88	39.77	73.19	2.31	115.27	7.89	82	446
Consumer services	82.48	115.49	29.24	227.21	37.44	68.38	1.78	107.61	7.43	77	412
Total Retail Expenditure	541.46	818.61	277.78	1 637.84	251.37	484.72	16.55	752.64	49.53	542	2 933
Propensity to spend at the centre											
Food & Groceries	25	30	20	26	7	7	0	7	7	10	18
Clothing & Accessories	60	60	30	55	40	40	10	39	30	30	46
Furniture & Appliances	25	20	10	21	20	20	5	20	5	5	18
Other Goods	40	40	30	38	30	30	10	30	30	30	35
Consumer services	25	20	5	20	10	10	5	10	10	10	15
Total Retail Expenditure	32	33	20	30	17	17	4	17	14	15	24
Centre Market Potential Rm											
Food & Groceries	54.32	108.21	30.36	192.89	7.30	14.95	0.00	22.25	1.35	23	238
Clothing & Accessories	43.78	63.48	11.47	118.74	13.22	25.06	0.22	38.50	1.97	20	177
Furniture & Appliances	20.28	22.60	2.08	44.97	7.37	13.38	0.07	20.82	0.37	4	70
Other Goods	35.04	49.44	11.30	95.78	11.93	21.96	0.23	34.12	2.37	25	155
Consumer services	20.62	23.10	1.46	45.18	3.74	6.84	0.09	10.67	0.74	8	64
Total Retail Expenditure	174.05	266.83	56.68	497.56	43.56	82.19	0.61	126.36	6.80	80	704
Trading Densities R/Sqm											
Food & Groceries	54 140	54 140	54 140	54 140	54 140	54 140	54 140	54 140	54 140	54 140	54 140
Clothing & Accessories	25 990	25 990	25 990	25 990	25 990	25 990	25 990	25 990	25 990	25 990	25 990
Furniture & Appliances	18 950	18 950	18 950	18 950	18 950	18 950	18 950	18 950	18 950	18 950	18 950
Other Goods	21 660	21 660	21 660	21 660	21 660	21 660	21 660	21 660	21 660	21 660	21 660
Consumer services	17 320	17 320	17 320	17 320	17 320	17 320	17 320	17 320	17 320	17 320	17 320
Overall Trading density R/sqm	26 500	26 800	33 000	28 375	24 200	24 500	21 900	24 383	24 976	26 616	27 400
Warranted Floorspace Sqm											
Food & Groceries	1 003	1 999	561	3 563	135	276	0	411	25	430	4 403
Clothing & Accessories	1 685	2 443	441	4 569	509	964	9	1 482	76	776	6 828
Furniture & Appliances	1 070	1 193	110	2 373	389	706	3	1 098	19	201	3 672
Other Goods	1 618	2 283	522	4 422	551	1 014	11	1 575	109	1 138	7 136
Consumer services	1 191	1 334	84	2 609	216	395	5	616	43	447	3 672
Total Retail Space	6 567	9 250	1 718	17 535	1 799	3 355	28	5 182	272	2 992	25 709
Contribution by sector	25.5%	36.0%	6.7%	68.2%	7.0%	13.1%	0.1%	20.2%	1.1%	11.6%	100.0%

Hermanus Centre Market Potential 2013 Date 28-Oct-11

Details	Primary			Sub-Total	Secondary			Sub-Total	Tourism	Total Inflow	Grand Total
	AB	CD	EF		AB	CD	EF				
Population	11 187	42 206	37 443	90 836	8 600	36 683	38 432	83 725	936	21 782	196 342
Economically Active (16-60) Rat	54%	60%	65%	61%	58%	59%	63%	61%	60%	60%	61%
Economically Active Population	6 058	25 215	24 420	55 693	5 021	21 734	24 234	50 988	562	13 607	119 689
Non - Earners Rate (est)	-16%	20%	35%	23%	-28%	7%	22%	11%	19%	14%	53%
Earning Population	7 035	20 058	15 889	42 981	6 405	20 104	19 023	45 532	456	11 191	56 723
Average salary / wage	366 620	145 480	40 810	142 980	222 550	132 310	42 400	107 441	387 191	167 167	227 566
Total Income PM Rmillion	2 579.1	2 918.0	648.4	6 145	1 425.4	2 660.0	806.6	4 892	177	1 871	12 908
Per Capita Annual Income	230 549	69 136	17 318	67 655	165 757	72 494	20 987	58 430	188 589	85 890	65 744
Household Size	3.3	3.9	4.8	4.1	3.4	3.9	4.7	4.2	3.9	3.7	4.1
Number of Households	3 397	10 923	7 864	22 185	2 514	9 470	8 175	20 159	239	5 954	48 298
Household Monthly Income	63 266	22 261	8 871	23 965	47 245	23 467	8 222	20 222	61 691	26 200	22 300
Household Annual Income	759 000	267 000	82 000	277 000	567 000	281 000	99 000	243 000	740 000	314 000	268 000
Propensity to shop at the Centre	95	95	100	97	70	60	5	36	86	99	71
Shopping Population	10 627	40 096	37 443	88 166	6 020	22 016	1 922	29 957	807	21 652	139 775
Source of Shoppers	7.6%	28.7%	25.8%	63.1%	4.3%	15.8%	1.4%	21.4%	0.6%	15.5%	100.0%
Expenditure % of Income											
Food & Groceries (format)	10.10	15.00	27.00	14.05	11.60	14.95	25.00	20.82	14.34	14.57	16.04
Clothing & Accessories	3.39	4.40	6.80	4.18	3.71	4.30	6.30	6.18	4.65	3.98	4.69
Furniture & Appliances	3.77	4.70	3.70	4.13	4.13	4.69	3.68	6.71	5.17	4.64	4.90
Other Goods	4.07	5.14	6.70	4.79	4.46	5.10	6.50	7.34	5.58	5.01	5.52
Consumer services	3.83	4.80	5.20	4.37	4.19	4.78	5.00	6.66	5.26	4.72	5.10
Total Retail Expenditure	25.17	34.04	49.40	31.53	28.09	33.82	46.48	47.92	35.00	32.92	36.25
Per Capita Expenditure R/Pa											
Food & Groceries	23 285	10 370	4 676	9 509	19 228	10 838	5 247	12 185	27 043	12 510	10 543
Clothing & Accessories	7 818	3 042	1 178	2 826	6 152	3 117	1 322	3 612	8 772	3 418	3 086
Furniture & Appliances	8 691	3 249	641	2 798	6 839	3 400	772	3 922	9 752	3 986	3 223
Other Goods	9 386	3 554	1 160	3 240	7 385	3 697	1 364	4 289	10 631	4 305	3 630
Consumer services	8 837	3 320	901	2 958	6 953	3 464	1 049	4 010	9 915	4 053	3 353
Total Retail Expenditure	58 018	23 536	8 555	21 330	46 557	24 516	9 755	27 998	66 012	28 271	23 834
Total Market Potential Rm											
Food & Groceries	247.46	415.81	175.08	838.35	115.75	238.60	10.08	364.43	21.81	271	1 474
Clothing & Accessories	83.09	121.97	44.09	249.15	37.03	68.63	2.54	108.20	7.07	74	431
Furniture & Appliances	92.37	130.29	23.99	246.65	41.17	74.65	1.48	117.50	7.86	86	450
Other Goods	99.75	142.49	43.44	285.68	44.46	81.40	2.62	128.48	8.49	93	507
Consumer services	93.91	133.14	33.72	260.76	41.86	76.27	2.02	120.14	8.00	88	469
Total Retail Expenditure	616.57	943.69	320.32	1 880.59	280.26	539.75	18.74	838.75	53.24	612	3 331
Propensity to spend at the centre											
Food & Groceries	25	30	20	26	7	7	0	7	7	10	19
Clothing & Accessories	60	60	30	55	40	40	10	39	30	30	47
Furniture & Appliances	25	20	10	21	20	20	5	20	5	5	18
Other Goods	40	40	30	38	30	30	10	30	30	30	35
Consumer services	25	20	5	20	10	10	5	10	10	10	15
Total Retail Expenditure	32	33	20	30	17	17	4	17	14	15	24
Centre Market Potential Rm											
Food & Groceries	61.87	124.74	35.02	221.62	8.10	16.70	0.00	24.80	1.45	26	273
Clothing & Accessories	49.85	73.18	13.23	136.26	14.81	27.45	0.25	42.52	2.12	22	201
Furniture & Appliances	23.09	26.06	2.40	51.55	6.23	14.97	0.07	23.28	0.99	4	79
Other Goods	39.90	56.99	13.03	109.93	13.34	24.42	0.26	38.02	2.55	28	176
Consumer services	23.46	26.63	1.69	51.79	4.19	7.63	0.10	11.91	0.80	9	72
Total Retail Expenditure	198.19	307.61	65.36	571.15	48.67	91.17	0.69	140.53	7.32	90	601
Trading Densities R/Sqm											
Food & Groceries	56 940	56 940	56 940	56 940	56 940	56 940	56 940	56 900	56 940	56 940	56 940
Clothing & Accessories	27 340	27 340	27 340	27 340	27 340	27 340	27 340	27 300	27 340	27 340	27 340
Furniture & Appliances	19 930	19 930	19 930	19 930	19 930	19 930	19 930	19 900	19 930	19 930	19 930
Other Goods	22 780	22 780	22 780	22 780	22 780	22 780	22 780	22 800	22 780	22 780	22 780
Consumer services	18 220	18 220	18 220	18 220	18 220	18 220	18 220	18 200	18 220	18 220	18 220
Overall Trading density R/sqm	27 900	30 300	34 700	29 855	25 500	25 800	23 000	25 600	26 300	27 999	28 800
Warranted Floorspace Sqm											
Food & Groceries	1 087	2 191	615	3 892	142	293	0	436	25	463	4 791
Clothing & Accessories	1 823	2 677	484	4 984	542	1 004	9	1 555	78	812	7 351
Furniture & Appliances	1 159	1 307	120	2 586	413	751	4	1 168	20	217	3 971
Other Goods	1 751	2 502	572	4 826	585	1 072	12	1 669	112	1 227	7 722
Consumer services	1 289	1 461	93	2 843	230	419	6	654	44	482	3 978
Total Retail Space	7 109	10 138	1 884	19 131	1 912	3 539	30	5 482	279	3 200	27 813
Contribution by sector	25.6%	36.5%	6.8%	68.8%	6.9%	12.7%	0.1%	19.7%	1.0%	11.5%	100.0%

Hermanus Centre Market Potential 2016

Date 26-Oct-11

Details	Primary				Secondary				Tourism	Total Inflow	Grand Total
	AB	CD	EF	Sub-Total	AB	CD	EF	Sub-Total			
Population	12 876	48 580	43 098	104 554	9 535	40 682	42 610	92 827	1 008	24 778	222 159
Economically Active (16-60) Rat	54%	60%	66%	62%	59%	60%	64%	61%	60%	60%	61%
Economically Active Population	7 016	29 242	28 319	64 577	5 598	24 280	27 078	56 956	609	14 902	136 435
Non - Earners Rate (est)	-16%	21%	38%	23%	-27%	8%	22%	11%	19%	14%	54%
Earning Population	8 132	23 159	18 256	49 548	7 130	22 375	21 092	50 598	492	12 763	63 361
Average salary / wage	400 620	158 970	44 910	156 607	243 190	144 580	46 660	117 657	423 994	162 156	253 115
Total Income PM Rmillion	3 258.0	3 681.6	819.9	7 759	1 734.0	3 235.0	964.2	5 933	209	2 325	16 038
Per Capita Income	253 029	75 784	19 024	74 215	181 868	79 519	23 097	64 132	207 072	93 828	72 190
Household Size	3.3	3.8	4.6	4.0	3.4	3.8	4.6	4.1	3.8	3.6	4.0
Number of Households	3 950	12 828	9 330	26 107	2 816	10 713	9 342	22 870	262	6 880	55 858
Household Monthly income	68 742	23 916	7 323	24 768	51 320	25 165	8 779	21 692	66 347	28 289	23 900
Household Annual Income	825 000	287 000	88 000	297 000	616 000	302 000	105 000	260 000	796 000	338 000	287 000
Propensity to shop at the Centre	95	95	100	97	70	60	5	36	86	99	72
Shopping Population	12 232	46 151	43 098	101 481	6 674	24 409	2 131	33 214	869	24 638	159 334
Source of Shoppers	7.7%	29.0%	27.0%	63.7%	4.2%	15.3%	1.3%	20.8%	0.5%	15.5%	100.0%
Expenditure % of Income											
Food & Groceries (formal)	9.80	14.90	25.00	13.71	11.20	14.80	23.00	20.40	13.80	14.35	15.64
Clothing & Accessories	3.29	4.25	6.30	4.01	3.64	4.10	6.00	5.95	4.53	3.95	4.52
Furniture & Appliances	3.66	4.68	3.68	4.08	4.04	4.65	3.64	6.83	5.03	4.59	4.82
Other Goods	3.95	5.06	6.50	4.68	4.37	5.02	6.25	7.21	5.43	4.95	5.40
Consumer services	3.72	4.75	5.00	4.28	4.11	4.73	4.80	6.76	5.12	4.66	4.99
Total Retail Expenditure	24.52	33.64	46.48	30.76	27.36	33.30	43.69	46.95	33.91	32.50	35.37
Per Capita Expenditure R/Pa											
Food & Groceries	25 050	11 282	4 758	10 174	20 369	11 769	5 312	13 083	28 578	13 461	11 289
Clothing & Accessories	8 326	3 221	1 198	2 977	6 616	3 260	1 366	3 814	9 372	3 706	3 264
Furniture & Appliances	8 266	3 547	700	3 026	7 355	3 698	841	4 249	10 419	4 304	3 479
Other Goods	9 996	3 835	1 237	3 474	7 942	3 992	1 444	4 622	11 252	4 648	3 895
Consumer services	9 411	3 603	951	3 177	7 478	3 762	1 109	4 338	10 593	4 376	3 605
Total Retail Expenditure	62 039	25 497	8 842	22 829	49 759	26 481	10 091	30 107	70 214	30 495	25 531
Total Market Potential Rm											
Food & Groceries	306.42	521.13	204.97	1 032.52	135.95	287.27	11.32	434.53	24.62	332	1 799
Clothing & Accessories	101.85	148.64	51.65	302.15	44.15	79.58	2.95	126.89	8.14	91	520
Furniture & Appliances	113.22	163.68	30.17	307.08	49.09	80.26	1.79	141.13	9.05	106	554
Other Goods	122.27	176.97	53.29	352.54	53.01	97.44	3.08	153.52	9.77	115	621
Consumer services	115.12	166.30	40.89	322.41	49.91	91.63	2.38	144.10	9.20	108	574
Total Retail Expenditure	758.88	1 176.74	381.08	2 316.70	332.10	646.37	21.50	999.99	60.98	751	4 068
Propensity to spend at the centre											
Food & Groceries	25	30	20	27	7	7	0	7	7	10	19
Clothing & Accessories	60	60	30	55	40	40	10	39	30	30	47
Furniture & Appliances	25	20	10	21	20	20	5	20	5	5	18
Other Goods	40	40	30	38	30	30	10	30	30	30	35
Consumer services	25	20	5	20	10	10	5	10	10	10	16
Total Retail Expenditure	32	32	20	30	17	17	4	17	14	15	24
Centre Market Potential Rm											
Food & Groceries	76.60	156.34	40.99	273.94	9.52	20.11	0.09	29.63	1.65	32	336
Clothing & Accessories	61.11	89.19	15.50	165.79	17.66	31.83	0.30	49.79	2.44	27	243
Furniture & Appliances	28.31	32.74	3.02	64.06	9.82	18.05	0.09	27.96	0.45	5	97
Other Goods	48.91	70.79	15.99	135.69	15.90	29.23	0.31	45.44	2.93	34	215
Consumer services	28.78	33.26	2.05	64.09	4.99	9.18	0.12	14.29	0.92	11	89
Total Retail Expenditure	243.71	382.31	77.54	703.57	57.89	108.41	0.81	167.11	8.40	110	981
Trading Densities R/Sqm											
Food & Groceries	62 340	62 340	62 340	62 340	62 340	62 340	62 340	62 300	62 340	62 340	62 340
Clothing & Accessories	29 930	29 930	29 930	29 930	29 930	29 930	29 930	29 900	29 930	29 930	29 930
Furniture & Appliances	21 820	21 820	21 820	21 820	21 820	21 820	21 820	21 800	21 820	21 820	21 820
Other Goods	24 940	24 940	24 940	24 940	24 940	24 940	24 940	24 900	24 940	24 940	24 940
Consumer services	19 950	19 950	19 950	19 950	19 950	19 950	19 950	20 000	19 950	19 950	19 950
Overall Trading density R/sqm	30 600	33 300	37 700	32 690	27 825	28 189	25 153	28 000	28 700	30 645	31 600
Warranted Floorspace Sqm											
Food & Groceries	1 229	2 508	658	4 394	153	323	0	475	26	519	5 388
Clothing & Accessories	2 042	2 980	518	5 539	590	1 064	10	1 664	82	915	8 118
Furniture & Appliances	1 297	1 500	138	2 936	450	827	4	1 281	21	243	4 460
Other Goods	1 961	2 838	641	5 441	638	1 172	12	1 822	118	1 378	8 640
Consumer services	1 443	1 667	103	3 212	250	460	6	716	46	540	4 469
Total Retail Space	7 971	11 494	2 057	21 522	2 080	3 846	32	6 958	292	3 595	31 076
Contribution by sector	25.7%	37.0%	6.6%	69.3%	6.7%	12.4%	0.1%	19.2%	0.9%	11.6%	100.0%

Hermanus Centre

Market Potential

2019

Date 26-Oct-11

Details	Primary				Secondary				Tourism	Total	Grand
	AB	CD	EF	Sub-Total	AB	CD	EF	Sub-Total			
Population	14 694	55 438	49 182	119 314	10 479	44 714	46 833	102 027	1 086	27 965	249 305
Economically Active (16-60) Rat	55%	60%	66%	62%	59%	60%	64%	62%	61%	60%	62%
Economically Active Population	8 021	33 509	32 464	73 994	6 163	26 798	29 902	62 863	659	16 879	153 736
Non - Earners Rate (est)	-16%	21%	36%	24%	-27%	8%	23%	12%	20%	15%	55%
Earning Population	9 281	26 438	20 717	56 436	7 838	24 615	23 096	55 551	530	14 390	69 941
Average salary / wage	437 770	173 710	49 420	171 511	265 740	157 990	51 340	126 849	464 287	198 601	281 595
Total Income PM Rmillion	4 063.1	4 592.5	1 023.8	9 679	2 082.9	3 889.0	1 185.8	7 158	246	2 858	19 695
Per Capita Income	276 522	82 840	20 818	81 126	198 757	86 974	25 320	70 155	226 654	102 199	79 000
Household Size	3.2	3.7	4.6	4.0	3.4	3.8	4.5	4.0	3.8	3.6	3.9
Number of Households	4 530	14 787	10 809	30 126	3 110	11 893	10 424	25 428	285	7 825	63 380
Household Monthly Income	74 749	25 881	7 894	26 775	55 806	27 249	9 489	23 457	71 878	30 400	25 900
Household Annual Income	897 090	311 000	95 090	321 000	670 000	327 000	114 000	281 000	863 000	365 000	311 000
Propensity to shop at the Centre	95	95	100	97	70	60	5	36	86	99	72
Shopping Population	13 959	52 666	49 182	115 807	7 336	26 826	2 342	36 506	935	27 814	189 127
Source of Shoppers	7.7%	29.2%	27.3%	64.3%	4.1%	14.9%	1.3%	20.3%	0.5%	15.4%	100.0%
Expenditure % of Income											
Food & Groceries (formal)	9.75	14.70	25.00	13.58	10.70	14.60	23.00	19.93	13.30	14.02	15.34
Clothing & Accessories	3.19	3.95	6.30	3.83	3.55	3.94	6.00	5.75	4.41	3.92	4.35
Furniture & Appliances	3.55	4.63	3.68	4.01	3.94	4.61	3.64	6.53	4.90	4.54	4.73
Other Goods	3.83	5.00	6.50	4.61	4.26	4.98	6.25	7.10	5.30	4.90	5.30
Consumer services	3.61	4.71	5.00	4.21	4.01	4.68	4.80	6.66	4.99	4.61	4.90
Total Retail Expenditure	23.94	32.99	46.48	30.22	26.46	32.81	43.69	45.96	32.90	31.98	34.61
Per Capita Expenditure R/Pa											
Food & Groceries	26 961	12 177	5 204	10 998	21 267	12 698	5 824	13 979	30 154	14 333	12 117
Clothing & Accessories	8 830	3 272	1 312	3 109	7 051	3 427	1 519	4 033	9 999	4 008	3 435
Furniture & Appliances	9 816	3 835	766	3 253	7 839	4 007	922	4 579	11 116	4 635	3 735
Other Goods	10 600	4 142	1 353	3 736	8 465	4 327	1 583	4 982	12 005	5 006	4 185
Consumer services	9 980	3 900	1 041	3 418	7 970	4 074	1 215	4 673	11 302	4 713	3 873
Total Retail Expenditure	66 187	27 327	9 676	24 515	52 592	28 533	11 062	32 246	74 577	32 695	27 345
Total Market Potential Rm											
Food & Groceries	376.35	641.34	255.96	1 273.65	156.01	340.67	13.64	510.32	28.20	399	2 183
Clothing & Accessories	123.26	172.33	64.50	360.09	51.73	91.94	3.56	147.22	9.35	111	619
Furniture & Appliances	137.02	202.00	37.68	376.70	57.50	107.50	2.16	167.16	10.40	129	673
Other Goods	147.97	218.14	66.55	432.66	62.10	116.09	3.71	181.89	11.23	139	754
Consumer services	139.31	205.38	51.19	395.88	58.46	109.29	2.85	170.60	10.57	131	698
Total Retail Expenditure	923.91	1 439.19	475.88	2 838.99	385.79	765.48	25.90	1 177.18	69.75	908	4 928
Propensity to spend at the centre											
Food & Groceries	25	30	20	27	7	7	0	7	7	10	19
Clothing & Accessories	60	60	30	55	40	40	10	39	30	30	47
Furniture & Appliances	25	20	10	21	20	20	5	20	5	5	18
Other Goods	40	40	30	38	30	30	10	30	30	30	35
Consumer services	25	20	5	20	10	10	5	10	10	10	16
Total Retail Expenditure	32	32	20	30	18	17	4	17	14	15	24
Centre Market Potential Rm											
Food & Groceries	94.09	192.40	51.19	337.68	10.92	23.85	0.00	34.77	1.86	39	411
Clothing & Accessories	73.95	103.40	19.35	196.70	20.69	36.77	0.36	57.82	2.81	33	288
Furniture & Appliances	34.28	40.40	3.77	78.42	11.50	21.50	0.11	33.11	0.52	6	118
Other Goods	59.19	87.26	19.87	166.41	18.63	34.83	0.37	53.83	3.37	42	262
Consumer services	34.83	41.08	2.56	78.46	5.85	10.93	0.14	16.92	1.06	13	108
Total Retail Expenditure	296.31	464.53	96.84	857.68	67.59	127.88	0.98	196.44	9.63	134	1 188
Trading Densities R/Sqm											
Food & Groceries	67 970	67 970	67 970	67 970	67 970	67 970	67 970	68 000	67 970	67 970	67 970
Clothing & Accessories	32 630	32 630	32 630	32 630	32 630	32 630	32 630	32 600	32 630	32 630	32 630
Furniture & Appliances	23 790	23 790	23 790	23 790	23 790	23 790	23 790	23 800	23 790	23 790	23 790
Other Goods	27 190	27 190	27 190	27 190	27 190	27 190	27 190	27 200	27 190	27 190	27 190
Consumer services	21 750	21 750	21 750	21 750	21 750	21 750	21 750	21 800	21 750	21 750	21 750
Overall Trading density R/Sqm	33 400	36 300	41 100	35 706	30 300	30 700	27 400	30 500	31 300	33 361	34 500
Warranted Floorspace Sqm											
Food & Groceries	1 384	2 831	753	4 968	161	351	0	512	28	573	6 052
Clothing & Accessories	2 266	3 169	593	6 028	634	1 127	11	1 772	86	1 025	8 825
Furniture & Appliances	1 440	1 698	158	3 296	483	904	5	1 392	22	271	4 959
Other Goods	2 177	3 209	734	6 120	685	1 281	14	1 980	124	1 536	9 638
Consumer services	1 601	1 889	118	3 607	269	502	7	778	49	803	4 988
Total Retail Space	8 869	12 795	2 357	24 021	2 232	4 165	36	6 433	308	4 007	34 461
Contribution by sector	25.7%	37.1%	6.8%	69.7%	6.5%	12.1%	0.1%	18.7%	0.9%	11.6%	100.0%

Hermanus Centre Market Potential 2024

Date 26-Oct-11

Details	Primary				Secondary				Tourism	Total Inflow	Grand Total
	AB	CD	EF	Sub-Total	AB	CD	EF	Sub-Total			
Population	17 877	67 449	59 837	145 163	12 267	52 341	54 821	119 430	1 229	33 634	298 227
Economically Active (16-60) Rat	55%	61%	66%	62%	59%	60%	64%	62%	61%	61%	62%
Economically Active Population	9 776	40 917	39 647	90 341	7 227	31 485	35 139	73 850	748	20 365	184 556
Non - Earners Rate (est)	-16%	21%	37%	24%	-27%	8%	23%	12%	20%	15%	55%
Earning Population	11 293	32 160	26 063	68 516	9 176	28 825	28 932	64 934	599	17 287	82 220
Average salary / wage	483 330	191 790	54 990	189 803	293 400	174 430	57 130	142 590	513 822	218 650	316 749
Total Income PM Rmillion	5 458.4	6 167.9	1 378.2	13 005	2 692.3	5 028.0	1 538.7	9 259	308	3 780	26 043
Per Capita Income	305 331	91 445	23 033	89 596	219 473	96 062	28 067	77 526	250 630	112 376	87 327
Household Size	3.2	3.7	4.5	3.9	3.4	3.7	4.4	4.0	3.8	3.5	3.9
Number of Households	5 539	18 173	13 351	37 062	3 659	14 063	12 388	30 110	326	9 487	76 659
Household Monthly Income	82 124	28 284	8 603	29 241	61 314	29 795	10 350	25 625	78 688	33 200	28 300
Household Annual Income	985 000	339 000	103 000	351 000	736 000	358 000	124 000	308 000	944 000	398 000	340 000
Propensity to shop at the Centre	95	95	100	97	70	60	5	36	86	99	73
Shopping Population	16 983	64 077	59 837	140 897	8 587	31 405	2 741	42 733	1 058	33 463	217 093
Source of Shoppers	7.8%	29.6%	27.6%	64.9%	4.0%	14.5%	1.3%	19.7%	0.5%	15.4%	100.0%
Expenditure % of Income											
Food & Groceries (formal)	9.58	14.50	23.00	13.18	10.30	14.18	21.00	19.26	12.95	13.57	14.83
Clothing & Accessories	3.07	3.93	6.00	3.74	3.46	3.91	5.80	5.66	4.28	3.88	4.25
Furniture & Appliances	3.41	4.58	3.64	3.93	3.85	4.54	3.63	6.40	4.76	4.46	4.62
Other Goods	3.68	4.95	6.25	4.49	4.15	4.90	6.10	6.97	5.14	4.82	5.17
Consumer services	3.47	4.66	4.80	4.11	3.91	4.61	4.76	6.54	4.84	4.54	4.78
Total Retail Expenditure	23.21	32.62	43.69	29.45	25.67	32.15	41.29	44.84	31.97	31.27	33.65
Per Capita Expenditure R/Pa											
Food & Groceries	29 251	13 260	5 298	11 806	22 606	13 625	5 894	14 534	32 459	15 250	12 953
Clothing & Accessories	9 367	3 594	1 382	3 350	7 593	3 796	1 628	4 391	10 730	4 365	3 711
Furniture & Appliances	10 413	4 192	838	3 517	8 441	4 359	1 019	4 965	11 929	5 015	4 033
Other Goods	11 245	4 527	1 440	4 025	9 116	4 708	1 712	5 401	12 882	5 416	4 511
Consumer services	10 587	4 262	1 106	3 684	8 583	4 432	1 335	5 068	12 128	5 099	4 174
Total Retail Expenditure	70 861	29 834	10 063	26 383	56 339	30 881	11 589	34 759	80 129	35 145	29 382
Total Market Potential Rm											
Food & Groceries	496.77	849.63	316.99	1 663.40	194.11	427.90	16.16	638.17	34.35	510	2 612
Clothing & Accessories	159.07	230.28	82.69	472.05	65.20	117.96	4.46	187.62	11.36	146	806
Furniture & Appliances	176.84	268.59	50.17	495.60	72.49	136.91	2.79	212.18	12.62	168	876
Other Goods	190.97	290.05	86.14	567.17	78.28	147.85	4.69	230.82	13.63	181	979
Consumer services	179.80	273.08	66.16	519.03	73.70	139.19	3.66	216.55	12.83	171	906
Total Retail Expenditure	1 203.46	1 911.63	602.15	3 717.24	483.78	969.80	31.77	1 485.35	84.79	1 176	6 379
Propensity to spend at the centre											
Food & Groceries	25	30	20	27	7	7	0	7	7	10	19
Clothing & Accessories	60	60	30	55	40	40	10	39	30	30	47
Furniture & Appliances	25	20	10	21	20	20	5	20	5	5	18
Other Goods	40	40	30	38	30	30	10	30	30	30	35
Consumer services	25	20	5	20	10	10	5	10	10	10	16
Total Retail Expenditure	32	32	20	30	18	17	4	17	14	15	24
Centre Market Potential Rm											
Food & Groceries	124.19	254.89	63.40	442.48	13.59	29.95	0.00	43.54	2.28	50	536
Clothing & Accessories	95.44	138.17	24.81	258.42	26.08	47.18	0.45	73.71	3.41	44	376
Furniture & Appliances	44.21	53.72	5.02	102.94	14.50	27.38	0.14	42.02	0.63	8	153
Other Goods	76.39	116.02	25.64	218.25	23.48	44.35	0.47	68.31	4.09	54	341
Consumer services	44.95	54.62	3.31	102.87	7.37	13.92	0.18	21.47	1.28	17	141
Total Retail Expenditure	385.19	617.41	122.37	1 124.97	85.02	162.79	1.24	249.05	11.69	174	1 548
Trading Densities R/Sqm											
Food & Groceries	78 510	78 510	78 510	78 510	78 510	78 510	78 510	78 500	78 510	78 510	78 510
Clothing & Accessories	37 690	37 690	37 690	37 690	37 690	37 690	37 690	37 703	37 690	37 690	37 690
Furniture & Appliances	27 480	27 480	27 480	27 480	27 480	27 480	27 480	27 500	27 480	27 480	27 480
Other Goods	31 410	31 410	31 410	31 410	31 410	31 410	31 410	31 400	31 410	31 410	31 410
Consumer services	25 120	25 120	25 120	25 120	25 120	25 120	25 120	25 100	25 120	25 120	25 120
Overall Trading density R/sqm	38 700	41 900	47 000	41 234	34 900	35 400	31 600	35 200	35 100	38 445	39 800
Warranted Floorspace Sqm											
Food & Groceries	1 582	3 247	808	5 636	173	382	0	555	29	635	6 826
Clothing & Accessories	2 832	3 666	658	6 956	692	1 252	12	1 956	90	1 163	9 975
Furniture & Appliances	1 609	1 955	183	3 746	528	996	5	1 529	23	305	5 581
Other Goods	2 432	3 694	823	6 948	748	1 412	15	2 175	130	1 731	10 864
Consumer services	1 789	2 174	132	4 095	293	554	7	855	51	679	5 629
Total Retail Space	9 944	14 735	2 603	27 282	2 434	4 596	39	7 069	324	4 514	38 665
Contribution by sector	25.6%	37.9%	6.7%	70.2%	6.3%	11.8%	0.1%	18.2%	0.8%	11.6%	100.0%



DPA LIFE PLANE DEFINITION

DPA have developed a Consumer Lifestyle Segmentation Model of which an important component is Life Plane™.

The Life Plane concept recognises that within a society there are differing socio-economic levels. Traditionally, these differing levels have been referred to as "Income Groups", and one typically finds markets divided into four categories, labelled A, B, C and D, the top end of the market being "A" and the lowest income group being "D".

The usefulness of this income group classification is very limited. The top group inevitably contains people between the ages of 45 and 55 while the lowest group is a mixture of very young and very old people - whose interests, needs and lifestyles are markedly different. The middle groups B and C also contain a wide variety of people from different backgrounds, with different aspirations.

After a great deal of experimentation, it would seem that the best way to segment the market into socio-economic groups is by classifying people into a combination of educational and income groupings. Education influences attitudes and perceptions, and plays a major role in shaping expectations and aspirations. It is the key to one's choice of career, and there is little doubt that education influences performance and thus income levels. There are exceptions, however, such as Academics who are well educated but are not top earners; and entrepreneurs who may not be well educated, but are "self made" successful businessmen.

To adequately reflect the socio-economic strata in the South African market, six Life Planes have been distinguished, based on education levels and incomes relative to age.



Life Plane A

People in the top Life Plane are doctors, lawyers, accountants, architects and engineers. They are usually graduate professionals.

Life Plane B

Plane B people are generally found in business, they do not have university degrees but have studied beyond school and have been awarded a diploma. Many reach senior positions in business.

Life Plane C

Plane C people have completed their schooling but have not studied further. They tend to be found in sales or clerical positions in business.

Life Plane D

Plane D people generally have three or four years of senior school and tend to follow technical careers with many becoming artisans - plumbers, electricians, mechanics, etc.

Life Plane E

Plane E people have only one or two years of senior school and many find jobs as factory workers and artisans assistants.

Life Plane F

Plane F people have no secondary schooling and many are barely literate. Most people in this category find employment as domestic servants, gardeners and labourers.
