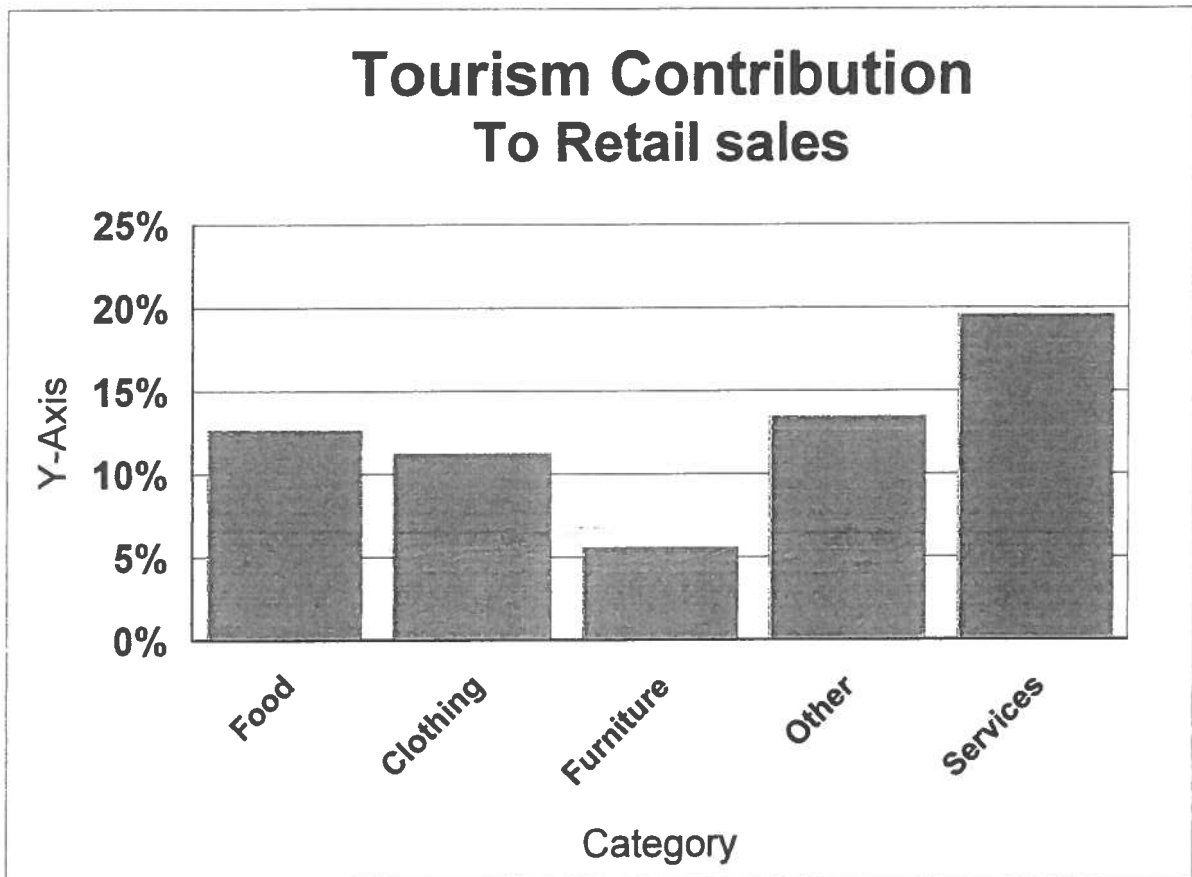


Total Study Area
Estimated Contribution of Tourism by Category

PRODUCT GROUP	Tourist Rmillion	% of Total
Based on Merchandise mix by store at group level		
Food and Groceries	183	13%
Clothing, Footwear etc	38	11%
Furniture and Appliances	6	6%
All Other Retail Goods	85	13%
Consumer Services	112	20%
TOTAL	423	14%



Town :	Total Study Area
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SUMMARY TABLES**Method (1)**

PRODUCT GROUP Based on Estimated Merchandise mix by store	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Food and Groceries	39 371	1 447	36 700	194	7.46
Clothing, Footwear and Accessories	19 125	334	17 500	142	2.36
Furniture and Appliances	11 126	114	10 200	81	1.40
All Other Retail Goods	54 049	631	11 700	411	1.54
Consumer Services	65 574	573	8 700	565	1.01
Vacant Retail Space	19 466	0	0	114	0.00
TOTAL	208 710	3 099	14 849	1507	2.06

* By Merchandise group

Method (2)

PRODUCT GROUP Based on Store Type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Food and Groceries	43 126	1 446	33 539	194	7.46
Clothing, Footwear and Accessories	19 298	323	16 800	142	2.28
Furniture and Appliances	11 728	120	10 200	81	1.48
All Other Retail Goods	52 964	605	11 400	411	1.47
Consumer Services	63 811	589	9 200	565	1.04
Vacant Retail Space	17 711	0	0	114	0.00
TOTAL	208 637	3 084	14 783	1507	2.05

Method (3)

PRODUCT GROUP Based on Merchandise mix by store at group level	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Food and Groceries	43 126	1 446	33 500	194	7.46
Clothing, Footwear and Accessories	19 298	323	16 800	142	2.28
Furniture and Appliances	11 728	120	10 200	81	1.48
Hardware and Motor	9 079	106	11 700	71	1.50
All Other Retail Goods	43 842	499	11 400	340	1.47
Consumer Services	63 811	589	9 200	565	1.04
Vacant Retail Space	19 466	0	0	114	0.00
TOTAL	210 349	3 084	14 663	1507	2.05

Method (4) - Average

PRODUCT GROUP An average of the 3 methods above	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Food and Groceries	41 874	1 446	34 500	194	7.46
Clothing, Footwear and Accessories	19 241	327	17 000	142	2.30
Furniture and Appliances	11 527	118	10 200	81	1.46
All Other Retail Goods	53 311	614	11 500	411	1.49
Consumer Services	64 399	584	9 100	565	1.03
Vacant Retail Space	18 881	0	0	114	0.00
TOTAL	209 232	3 089	14 765	1507	2.05

Method (1) This method is based on the estimated split of trading space allocated to each merchandise category within each store. It is probably the most accurate of all three methods used

Method (2) This approach estimates sales per store, and a single merchandise category is assigned per store. Supermarkets are for example assumed to be 100% food

Method (3) This approach is similar to (2) above, except that the agglomeration is done at merchandise group level rather than at category level

Town :	Total Study Area
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* By store Type

ANALYSIS OF FOOD Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Supermarkets, Hypermarkets	27 815	1000.4	36 000	46	21.75
Cafes & Forecourt stores	2 260	68.1	30 100	25	2.72
General Dealers	0	0.0	0	0	0.00
Cash and Carry	1 011	30.9	30 500	4	7.72
Take Aways	2 167	63.6	29 400	25	2.55
Specialist stores (Incl Butchers etc)	9 873	283.4	28 700	94	3.02
Total Food and Groceries	43 126	1446.4	33 539	194	7.46

ANALYSIS OF CLOTHING Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Family Clothing	8 271	147.08	17 800	40	3.68
Menswear, Ladies, Children	5 191	91.94	17 700	50	1.84
Shoes	1 099	18.24	16 600	12	1.52
Sports clothing	1 405	23.30	16 600	8	2.91
Specialist Stores	3 332	42.90	12 900	32	1.34
Total Clothing, Footwear etc	19 298	323.46	16 800	142	2.28

ANALYSIS OF FURNITURE Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Furniture & Appliances	5 202	54.09	10 400	20	2.70
Hi Fi / Tv / Video	170	1.84	10 800	1	1.84
Lamps & Lighting	359	4.01	11 200	5	0.80
Antiques	2 237	22.53	10 100	14	1.61
Specialists / Seconds / Garden	3 761	37.61	10 000	41	0.92
Total Furniture, Appliances etc	11 728	120.07	10 200	81	1.48

ANALYSIS OF OTHER GOODS Based on Store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Hardware and Building materials	6 620	77.2	11 700	53	1.46
Motor Vehicles and Equipment	2 460	29.1	11 800	18	1.61
Books, Liquor, Florist, Chemist, Cosmetics	19 745	244.1	12 400	150	1.63
Bikes, Phones, Cameras, Jewell., Music Eq	3 331	37.2	11 200	58	0.64
Arms, camping, Gifts, Sport Eq, Housewares	20 808	217.4	10 400	132	1.65
Total Other Goods	52 964	604.9	11 400	411	1.47

ANALYSIS OF SERVICES Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Entertainment Serv.	31 053	295.6	9 500	205	1.44
Financial Services	13 153	117.9	9 000	136	0.87
Medical Services	3 834	34.2	8 900	37	0.93
Personal Services	12 465	109.1	8 800	140	0.78
Repair Services	3 306	32.6	9 800	47	0.69
Total Services	63 811	589.4	9 200	565	1.04

Vacant stores	17 711			114	
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Town :	Total Study Area
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NON - RETAIL ANALYSIS	Non Retail		Total		Non - Retail % of Total	
	GROSS SQM	GROSS SQM	Sales Rmill	Sales Rmill	Space %	Sales %
Based on store type						
Supermarkets, Hypermarkets	1 477	29 292	57.9	1 058	5.04%	5.47%
Cafes & Forecourt stores	0	2 260	0.0	68	0.00%	0.00%
General Dealers	0	0	0.0	0	0.00%	0.00%
Cash and Carry	494	1 505	15.6	46	32.81%	33.52%
Take Aways	0	2 167	0.0	64	0.00%	0.00%
Specialist stores (Incl Butchers etc)	854	10 726	31.5	315	7.96%	10.01%
Total Food and Groceries	2 825	45 950	105.0	1 551	6.15%	6.77%

* By store Type

ANALYSIS OF CLOTHING	GROSS SQM		SALES Rmill		Space %	
	GROSS SQM	GROSS SQM	SALES Rmill	GROSS SQM	Space %	Sales %
Based on store type						
Family Clothing	13	8 284	0.20	147	0.16%	0.13%
Menswear, Ladies, Children	0	5 191	0.00	92	0.00%	0.00%
Shoes	0	1 099	0.00	18	0.00%	0.00%
Sports clothing	0	1 405	0.00	23	0.00%	0.00%
Specialist Stores	40	3 372	0.53	43	1.19%	1.23%
Total Clothing, Footwear etc	54	19 352	0.73	324	0.28%	0.23%

ANALYSIS OF FURNITURE	GROSS SQM		SALES Rmill		Space %	
	GROSS SQM	GROSS SQM	SALES Rmill	GROSS SQM	Space %	Sales %
Based on store type						
Furniture & Appliances	308	5 510	3.29	57	5.59%	5.73%
Hi Fi / Tv / Video	17	187	0.18	2	9.09%	9.09%
Lamps & Lighting	151	510	1.71	6	29.62%	29.95%
Antiques	92	2 329	0.89	23	3.96%	3.81%
Specialists / Seconds / Garden	612	4 372	6.46	44	14.00%	14.65%
Total Furniture, Appliances etc	1 181	12 909	12.53	133	9.15%	9.45%

ANALYSIS OF OTHER GOODS	GROSS SQM		SALES Rmill		Space %	
	GROSS SQM	GROSS SQM	SALES Rmill	GROSS SQM	Space %	Sales %
Based on Store type						
Hardware and Building materials	2 263	8 883	26.9	104	25.48%	25.84%
Motor Vehicles and Equipment	787	3 247	9.3	38	24.25%	24.21%
Books, Liquor, Florist, Chemist, Cosmetics	1 311	21 056	15.9	260	6.23%	6.12%
Bikes, Phones, Cameras, Jewell., Music Eq	86	3 418	0.9	38	2.52%	2.33%
Arms, camping, Gifts, Sport Eq, Housewares	2 511	23 319	36.2	254	10.77%	14.27%
Total Other Goods	6 959	59 922	89.2	694	11.61%	12.85%

ANALYSIS OF SERVICES	GROSS SQM		SALES Rmill		Space %	
	GROSS SQM	GROSS SQM	SALES Rmill	GROSS SQM	Space %	Sales %
Based on store type						
Entertainment Serv.	92	31 144	0.8	296	0.29%	0.28%
Financial Services	2 059	15 212	19.5	137	13.53%	14.19%
Medical Services	45	3 879	0.1	34	1.15%	0.27%
Personal Services	458	12 923	3.9	113	3.55%	3.47%
Repair Services	1 182	4 488	12.1	45	26.34%	27.03%
Total Services	3 836	67 646	36.4	626	5.67%	5.82%

Total Retail plus Non- Retail	14 853	205 779	244	3 328	7.22%	7.33%
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Town :	Total Study Area
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Detailed Analysis : Table (1)

FOOD & GROCERIES	GROSS	SALES	Trading	No. of	Sales/	% of
Based on store type	SQM	Rmill	Density	Stores*	Store	Category
Baker	552	15	27 800	5	3.07	1.1%
Biltong	273	9	34 500	10	0.94	0.6%
Butcher	1804	56	31 200	17	3.31	3.9%
Cafe / Forecourt stores	2260	68	30 100	25	2.72	4.7%
Cash & Carry	1011	31	30 500	4	7.72	2.1%
Chicken Shop	954	29	30 600	10	2.92	2.0%
Coffees	54	2	30 600	1	1.65	0.1%
Delicatessen	230	8	36 000	3	2.76	0.6%
Factory Shop - Foods	506	11	21 900	3	3.69	0.8%
Farmstall	563	11	18 900	3	3.54	0.7%
Greengrocer	1932	75	39 000	9	8.38	5.2%
Homebakes	1136	20	17 500	9	2.20	1.4%
IceCream / Frozen Yogurt	49	2	36 000	2	0.88	0.1%
Pies	110	4	36 000	1	3.97	0.3%
Specialist Foods / Organic	1178	26	22 300	13	2.02	1.8%
Superette / Mini market	3523	111	31 600	15	7.42	7.7%
Supermarket	24292	889	36 600	31	28.68	61.3%
Sweets	467	13	28 800	5	2.69	0.9%
Take away foods	2167	64	29 400	23	2.77	4.4%
Tuckshop	21	1	28 800	1	0.59	0.0%
Water Bar	175	5	27 200	4	1.19	0.3%
TOTAL FOOD & GROCERIES	43256	1450.9	33 500	194	93.12	100.0%

CLOTHING & FOOTWEAR	GROSS	SALES	Trading	No. of	Sales/	% of
Based on store type	SQM	Rmill	Density	Stores*	Store	Category
Accessories	86	0.9	10 400	3	0.30	0.3%
Babywear	32	0.6	18 000	1	0.57	0.2%
Childrens Clothing	36	0.5	12 600	2	0.23	0.1%
Family Clothing	8271	147.1	17 800	40	3.68	45.5%
Haberdashery	522	5.5	10 500	5	1.10	1.7%
Ladies Clothing	4077	72.4	17 700	38	1.90	22.4%
Ladies & mens clothing	541	9.5	17 500	5	1.89	2.9%
Leather Clothing /Mohair /Cotton	134	1.7	13 000	2	0.87	0.5%
Linen Shops	1139	13.0	11 400	6	2.17	4.0%
Menswear	437	7.9	18 000	3	2.62	2.4%
Outdoor / Adventure clothing	147	2.5	16 900	1	2.49	0.8%
Shoes	1099	18.2	16 600	12	1.52	5.6%
Sports Clothing	1405	23.3	16 600	8	2.91	7.2%
Teen Clothing /Unisex	69	1.2	18 000	1	1.23	0.4%
Ties / Socks / Shirts	24	0.3	14 400	1	0.34	0.1%
Uniforms	506	8.5	16 900	5	1.71	2.6%
Used Clothing	774	10.4	13 400	9	1.15	3.2%
TOTAL CLOTHING & FOOTWEAR	19298	323	16 800	142	2.28	100.0%

Town :	Total Study Area
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Detailed Analysis : Table (2)

FURNITURE & APPLIANCES Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store	% of Category
Antiques	2237	22.5	10 100	14	1.61	21.8%
Appliances	270	2.3	8 600	1	2.33	2.3%
Beds	390	4.0	10 300	3	1.33	3.9%
Carpets & Rugs	675	7.5	11 200	7	1.08	7.3%
Cupboards	120	1.2	10 000	2	0.60	1.2%
Curtaining	72	0.9	12 600	1	0.91	0.9%
Electrical Goods	923	8.6	9 400	16	0.54	8.3%
Furniture	4932	51.8	10 500	19	2.72	50.0%
Hi Fi / TV / Video / DvD	170	1.8	10 800	1	1.84	1.8%
Kitchens	244	2.6	10 500	4	0.64	2.5%
Lamps & Lighting	359	4.0	11 200	5	0.80	3.9%
Second Hand furniture	1336	0.0	0	8	0.00	0.0%
TOTAL FURNITURE & APPLIANCES	10688	104	9 700	75	13.17	100.0%

OTHER RETAIL GOODS Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store	% of Category
Hardware & Building Materials						
Blinds & Drapes	136	1.7	12 600	2	0.86	2.3%
Building Materials	2012	25.2	12 500	10	2.52	33.6%
Ceramic Tiles	456	5.7	12 600	4	1.44	7.7%
Domestic Hardware	2013	22.7	11 300	14	1.62	30.2%
Lawnmowers	230	1.7	7 200	1	1.65	2.2%
Mirrors & Framing	249	2.7	10 900	4	0.68	3.6%
Paint	846	10.6	12 500	10	1.06	14.1%
Sanitary ware	68	0.9	12 600	1	0.85	1.1%
Security Equipment	64	0.6	8 800	1	0.56	0.7%
Swimming Pool Equipment	322	3.1	9 600	2	1.55	4.1%
Timber & Boards	224	2.4	10 900	4	0.61	3.3%
Hardware & Building Materials	6326	75	11 900	51	11.18	100.0%

OTHER RETAIL GOODS Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store	% of Category
Motor						
Boats	110	1.3	11 500	1	1.27	4.6%
Exhausts / Shocks / Tyres	1464	17.3	11 800	10	1.73	62.3%
Motor accessories / safari equip	147	1.3	8 800	1	1.30	4.7%
Motor showrooms (NewCars)	632	8.0	12 600	1	7.96	28.7%
Motor Spares	106	1.2	11 600	5	0.25	4.4%
Motor	2350	28	11 800	17	11.24	100.0%

Town :	Total Study Area
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Detailed Analysis : Table (3)

OTHER RETAIL GOODS Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store	% of Category
Miscellaneous - Semi durable goods						
Baby goods	82	1.1	13 700	1	1.13	0.5%
Beads	364	3.2	8 800	3	1.07	1.5%
Bicycles	444	4.1	9 200	6	0.68	1.9%
Camping & Outdoor	221	2.0	9 000	1	1.98	0.9%
CD's Tapes and records	190	2.2	11 600	2	1.11	1.0%
Ceramic ware (pottery)	127	1.6	12 600	1	1.60	0.7%
Computer Equipment	812	8.0	9 800	13	0.62	3.7%
Equestrian (Saddles, bridlesetc)	15	0.2	12 600	1	0.19	0.1%
Fabric	259	2.0	7 700	3	0.66	0.9%
General Dealer	8542	84.8	9 900	36	2.35	39.6%
Gifts	813	9.4	11 500	13	0.72	4.4%
Homeware	331	4.1	12 400	3	1.37	1.9%
Interior Decor	3127	39.7	12 700	15	2.65	18.6%
Kitchen Equipment	49	0.4	7 600	1	0.37	0.2%
Luggage	50	0.6	12 600	1	0.63	0.3%
Musical Instruments	88	0.8	8 800	1	0.78	0.4%
Noveltie (Verimark)	41	0.4	8 800	1	0.36	0.2%
Nursery	2833	28.7	10 100	8	3.59	13.4%
Second Hand Goods	1960	19.4	9 900	16	1.21	9.0%
Spy shop (Home security)	45	0.4	7 900	2	0.18	0.2%
Toys and Hobbies	414	4.4	10 600	4	1.10	2.1%
Miscellaneous - Semi durable goods	20444	214	10 500	129	23.28	100.0%

OTHER RETAIL GOODS Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store	% of Category
Miscellaneous - Non durable goods						
Art Gallery	3299	37.3	11 300	25	1.49	15.5%
Arts & Crafts	2057	23.5	11 400	26	0.90	9.7%
Bath Products	71	0.5	7 600	1	0.53	0.2%
Books & Stationery	2363	28.8	12 200	20	1.44	11.9%
Bottle store	5962	79.8	13 400	34	2.35	33.1%
Chemicals	37	0.4	11 800	2	0.22	0.2%
Cosmetics & Perfumes	159	1.7	10 500	1	1.67	0.7%
Florist	474	4.7	9 900	4	1.17	1.9%
Gas	208	2.4	11 700	3	0.81	1.0%
Health Shop /Beauty Products	2035	27.4	13 400	13	2.10	11.3%
Packaging	44	0.6	12 600	1	0.56	0.2%
Party Shop	51	0.5	9 900	1	0.51	0.2%
Pet Shop	479	5.4	11 200	7	0.77	2.2%
Pharmacy	2482	31.0	12 500	11	2.81	12.8%
Tobacconist / Cigar shop	26	0.2	8 800	1	0.23	0.1%
Miscellaneous - Non durable goods	19493	241	12 400	146	16.20	100.0%

Town :	Total Study Area
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Detailed Analysis : Table (4)

OTHER RETAIL GOODS Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store	% of Category
Miscellaneous - Durable goods						
Braai equipment / pizza ovens	39	0.3	8 800	1	0.35	0.9%
Cellphones	1470	12.8	8 700	29	0.44	34.5%
Jewellers / Watches/ Silverware	1045	12.6	12 100	22	0.57	34.0%
Sewing machines	110	0.9	8 500	1	0.94	2.5%
Sports Equipment	519	9.2	17 600	4	2.29	24.6%
Wrought Iron work	147	1.3	8 800	1	1.30	3.5%
Miscellaneous - Durable goods	3331	37	11 200	58	5.89	100.0%

CONSUMER SERVICES Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store	% of Category
Personal Services						
Art Studio	274	2.6	9 500	2	1.31	2.8%
Beautician	1518	14.4	9 500	18	0.80	15.2%
Car Wash	524	4.1	7 900	7	0.59	4.4%
Designers	70	0.6	9 000	1	0.63	0.7%
Drycleaner / Laundry	1102	9.2	8 300	18	0.51	9.7%
Educational	240	2.0	8 400	5	0.40	2.1%
Engraving	24	0.2	7 200	1	0.17	0.2%
Events	141	1.3	9 000	4	0.32	1.3%
Funeral Parlour/ Memorials	1474	13.0	8 800	11	1.18	13.7%
Gym and Keep fit	3160	28.1	8 900	30	0.94	29.6%
Hairdressers	2865	25.1	8 800	50	0.50	26.5%
Health Spa	31	0.3	10 100	1	0.32	0.3%
Kennels	573	4.4	7 600	3	1.46	4.6%
Massage	32	0.3	9 000	1	0.29	0.3%
Nail bars	83	0.7	8 200	2	0.34	0.7%
Photo processing	208	1.8	8 500	4	0.44	1.9%
Photographic Studio	96	0.7	7 200	3	0.23	0.7%
Tattoo Parlour	49	0.4	7 200	1	0.35	0.4%
Personal Services	10731	95	8 800	140	5.75	100.0%

CONSUMER SERVICES Based on store type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store	% of Category
Financial Services						
Accountants	18	0.2	9 000	1	0.16	0.1%
Banks	5451	50.6	9 300	24	2.11	42.9%
Car rental	82	0.7	9 000	1	0.74	0.6%
Cash Loans	573	4.7	8 200	6	0.78	4.0%
Estate Agents	3614	31.1	8 600	58	0.54	26.3%
Foreign Exchange	35	0.3	9 000	1	0.31	0.3%
Insurance Brokers	467	4.2	8 900	6	0.69	3.5%
Lawyers	1073	9.5	8 800	10	0.95	8.0%
Other Financial	476	3.8	8 000	8	0.47	3.2%
Post office / Agency	1361	12.9	9 500	10	1.29	11.0%
Financial Services	13153	118	9 000	136	8.04	100.0%

Town :	Total Study Area
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Detailed Analysis : Table (5)

CONSUMER SERVICES	GROSS	SALES	Trading	No. of	Sales/	% of
Based on store type	SQM	Rmill	Density	Stores*	Store	Category
Medical Services						
Dentists	358	3.3	9 100	4	0.82	9.5%
General Practitioners	942	8.4	8 900	8	1.05	24.6%
Muti Shop	34	0.2	6 600	1	0.23	0.7%
Optometrists / Opticians	1201	11.1	9 200	14	0.79	32.3%
Other medical services	98	0.8	8 300	2	0.41	2.4%
Physiotherapists	110	1.0	9 000	1	0.99	2.9%
Vets	1091	9.5	8 700	7	1.35	27.7%
Medical Services	3834	34	8 900	37	5.63	100.0%

CONSUMER SERVICES	GROSS	SALES	Trading	No. of	Sales/	% of
Based on store type	SQM	Rmill	Density	Stores*	Store	Category
Entertainment Services						
Bars /Taverns	1446	11.3	7 800	10	1.13	3.8%
Booking Office (Computicket)	692	7.1	10 300	8	0.89	2.4%
Catering Hire	16	0	9 000	1	0.15	0.1%
Childrens entertainment / care	831	6.0	7 200	2	2.99	2.0%
Coffee shop	3342	43.0	12 900	30	1.43	14.5%
Entertainment Other	463	3.0	6 400	4	0.75	1.0%
Information / Tourist offices	490	4.4	9 000	6	0.74	1.5%
Internet Cafe	304	2.5	8 200	6	0.42	0.8%
Libraries	1144	9.9	8 600	5	1.97	3.3%
Restaurants	20203	189.1	9 400	108	1.75	64.0%
Travel Agencies	349	3.1	8 800	5	0.61	1.0%
Video Games	318	2.6	8 100	3	0.86	0.9%
Video Hire	1455	13.7	9 400	16	0.85	4.6%
Entertainment Services	31036	295	9 500	205	14.38	100.0%

CONSUMER SERVICES	GROSS	SALES	Trading	No of	Sales/	% of
Based on store type	SQM	Rmill	Density	Stores*	Store	Category
Repairs & Servicing						
Airconditioning	41	0.4	10 600	1	0.44	1.3%
Electrical appliance repairs	58	0.6	10 100	1	0.59	1.8%
Electrician	348	3.2	9 300	5	0.65	9.9%
Flooring	120	1.5	12 600	3	0.50	4.6%
Glass fitting	733	8.7	11 800	6	1.44	26.6%
Hiring services	313	2.6	8 400	5	0.53	8.1%
Lawnmower repairs	103	0.8	7 800	1	0.81	2.5%
Locksmith / keys	182	1.5	8 300	3	0.50	4.6%
Motor servicing & repairs	284	2.2	7 900	3	0.75	6.9%
Other Services	34	0.4	11 200	2	0.19	1.2%
Plumbing	123	1.6	12 600	1	1.56	4.8%
Pool / garden maintenance	118	1.5	12 600	1	1.48	4.6%
Printing	236	2.0	8 600	5	0.41	6.3%
Security services	466	4.2	9 000	6	0.70	12.9%
TV and Video repairs / installation	148	1.3	8 700	4	0.32	3.9%
Repairs & servicing	3306	33	9 800	47	10.86	100.0%

Town : Hermanus Total

SUMMARY TABLES**Method (1)**

PRODUCT GROUP Based on Estimated Merchandise mix by store	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Food and Groceries	17 876	722	40 400	70	10.32
Clothing, Footwear and Accessories	10 691	192	17 900	74	2.59
Furniture and Appliances	6 687	69	10 400	43	1.62
All Other Retail Goods	24 602	303	12 300	197	1.54
Consumer Services	31 190	279	8 900	245	1.14
Vacant Retail Space	7 407	0	0	28	0.00
TOTAL	98 452	1 565	15 901	657	2.38

* By Merchandise group

Method (2)

PRODUCT GROUP Based on Store Type	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Food and Groceries	20 291	742	36 562	70	10.60
Clothing, Footwear and Accessories	10 911	186	17 100	74	2.51
Furniture and Appliances	5 867	60	10 200	43	1.39
All Other Retail Goods	26 423	296	11 200	197	1.50
Consumer Services	29 432	277	9 400	245	1.13
Vacant Retail Space	5 529	0	0	28	0.00
TOTAL	98 452	1 561	15 853	657	2.38

Method (3)

PRODUCT GROUP Based on Merchandise mix by store at group level	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Food and Groceries	20 291	742	36 600	70	10.60
Clothing, Footwear and Accessories	10 911	186	17 100	74	2.51
Furniture and Appliances	5 867	60	10 200	43	1.39
Hardware and Motor	3 512	42	11 900	38	1.10
All Other Retail Goods	22 868	254	11 100	159	1.60
Consumer Services	29 432	277	9 400	245	1.13
Vacant Retail Space	7 407	0	0	28	0.00
TOTAL	100 288	1 561	15 563	657	2.38

Method (4) - Average

PRODUCT GROUP An average of the 3 methods above	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store
Food and Groceries	19 486	735	37 700	70	10.50
Clothing, Footwear and Accessories	10 837	188	17 300	74	2.54
Furniture and Appliances	6 140	63	10 300	43	1.47
All Other Retail Goods	25 801	298	11 600	197	1.51
Consumer Services	30 018	278	9 300	245	1.13
Vacant Retail Space	6 781	0	0	28	0.00
TOTAL	99 064	1 562	15 771	657	2.38

Method (1) This method is based on the estimated split of trading space allocated to each merchandise category within each store. It is probably the most accurate of all three methods used

Method (2) This approach estimates sales per store, and a single merchandise category is assigned per store. Supermarkets are for example assumed to be 100% food

Method (3) This approach is similar to (2) above, except that the agglomeration is done at merchandise group level rather than at category level

Town :	Hermanus Total
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ANALYSIS OF FOOD	GROSS	SALES	Trading	No. of	Sales/
Based on store type	SQM	Rmill	Density	Stores*	Store
Supermarkets, Hypermarkets	13 973	533.7	38 200	15	35.58
Cafes & Forecourt stores	528	18.8	35 600	5	3.76
General Dealers	0	0.0	0	0	0.00
Cash and Carry	953	28.8	30 200	3	9.59
Take Aways	1 153	35.4	30 700	11	3.22
Specialist stores (Incl Butchers etc)	3 685	125.2	34 000	36	3.48
Total Food and Groceries	20 291	741.9	36 562	70	10.60

* By store Type

ANALYSIS OF CLOTHING	GROSS	SALES	Trading	No. of	Sales/
Based on store type	SQM	Rmill	Density	Stores*	Store
Family Clothing	4 230	78.24	18 500	17	4.60
Menswear, Ladies, Children	2 955	53.59	18 100	28	1.91
Shoes	744	12.41	16 700	7	1.77
Sports clothing	832	13.89	16 700	3	4.63
Specialist Stores	2 150	27.96	13 000	19	1.47
Total Clothing, Footwear etc	10 911	186.08	17 100	74	2.51

ANALYSIS OF FURNITURE	GROSS	SALES	Trading	No. of	Sales/
Based on store type	SQM	Rmill	Density	Stores*	Store
Furniture & Appliances	1 949	20.32	10 400	8	2.54
Hi Fi / Tv / Video	170	1.84	10 800	1	1.84
Lamps & Lighting	263	2.95	11 200	3	0.98
Antiques	1 172	11.21	9 600	7	1.60
Specialists / Seconds / Garden	2 313	23.57	10 200	24	0.98
Total Furniture, Appliances etc	5 867	59.89	10 200	43	1.39

ANALYSIS OF OTHER GOODS	GROSS	SALES	Trading	No. of	Sales/
Based on Store type	SQM	Rmill	Density	Stores*	Store
Hardware and Building materials	2 502	29.4	11 700	32	0.92
Motor Vehicles and Equipment	1 010	12.4	12 300	6	2.07
Books, Liquor, Florist, Chemist, Cosmetics	11 947	146.9	12 300	79	1.86
Bikes, Phones, Cameras, Jewell., Music Eq	1 411	18.5	13 100	28	0.66
Arms, camping, Gifts, Sport Eq, Housewares	9 552	88.5	9 300	52	1.70
Total Other Goods	26 423	295.7	11 200	197	1.50

ANALYSIS OF SERVICES	GROSS	SALES	Trading	No. of	Sales/
Based on store type	SQM	Rmill	Density	Stores*	Store
Entertainment Serv.	14 444	139.5	9 700	82	1.70
Financial Services	4 397	40.6	9 200	54	0.75
Medical Services	1 257	12.3	9 800	11	1.12
Personal Services	7 398	65.1	8 800	75	0.87
Repair Services	1 935	19.7	10 200	23	0.85
Total Services	29 432	277.2	9 400	245	1.13

Vacant stores	5 529			28	
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Town :	Hermanus Total
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ANALYSIS OF FOOD Based on store type	Non Retail	Total	Non Retail	Total	Non - Retail % of Total	
	GROSS SQM	GROSS SQM	Sales Rmill	Sales Rmill	Space %	Sales %
Supermarkets, Hypermarkets	1 082	15 056	43.7	577	7.19%	7.57%
Cafes & Forecourt stores	0	528	0.0	19	0.00%	0.00%
General Dealers	0	0	0.0	0	0.00%	0.00%
Cash and Carry	494	1 446	15.6	44	34.15%	35.12%
Take Aways	0	1 153	0.0	35	0.00%	0.00%
Specialist stores (Incl Butchers etc)	570	4 254	21.4	147	13.39%	14.60%
Total Food and Groceries	2 146	22 437	80.7	823	9.56%	9.81%

* By store Type

ANALYSIS OF CLOTHING Based on store type	GROSS SQM	GROSS SQM	SALES Rmill	SALES Rmill	Space %	Sales %
	Family Clothing	0	4 230	0.00	78	0.00%
Menswear, Ladies, Children	0	2 955	0.00	54	0.00%	0.00%
Shoes	0	744	0.00	12	0.00%	0.00%
Sports clothing	0	832	0.00	14	0.00%	0.00%
Specialist Stores	28	2 178	0.38	28	1.28%	1.34%
Total Clothing, Footwear etc	28	10 939	0.38	186	0.26%	0.20%

ANALYSIS OF FURNITURE Based on store type	GROSS SQM	GROSS SQM	SALES Rmill	SALES Rmill	Space %	Sales %
	Furniture & Appliances	239	2 189	2.44	23	10.94%
Hi Fi / Tv / Video	17	187	0.18	2	9.09%	9.09%
Lamps & Lighting	111	374	1.26	4	29.74%	29.88%
Antiques	77	1 249	0.76	12	6.14%	6.32%
Specialists / Seconds / Garden	496	2 809	5.14	29	17.66%	17.91%
Total Furniture, Appliances etc	940	6 807	9.78	70	13.82%	14.03%

ANALYSIS OF OTHER GOODS Based on Store type	GROSS SQM	GROSS SQM	SALES Rmill	SALES Rmill	Space %	Sales %
	Hardware and Building materials	1 657	4 159	19.8	49	39.84%
Motor Vehicles and Equipment	147	1 157	1.7	14	12.67%	12.03%
Books, Liquor, Florist, Chemist, Cosmetics	1 099	13 046	13.3	160	8.43%	8.32%
Bikes, Phones, Cameras, Jewell., Music Eq	37	1 448	0.4	19	2.55%	1.95%
Arms, camping, Gifts, Sport Eq, Housewares	1 404	10 956	17.4	106	12.82%	16.41%
Total Other Goods	4 344	30 766	52.6	348	14.12%	15.10%

ANALYSIS OF SERVICES Based on store type	GROSS SQM	GROSS SQM	SALES Rmill	SALES Rmill	Space %	Sales %
	Entertainment Serv.	64	14 508	0.6	140	0.44%
Financial Services	1 232	5 630	12.0	53	21.89%	22.74%
Medical Services	0	1 257	0.0	12	0.00%	0.00%
Personal Services	344	7 742	2.9	68	4.44%	4.30%
Repair Services	766	2 700	7.9	28	28.36%	28.77%
Total Services	2 406	31 838	23.4	301	7.56%	7.79%

Total Retail and Non - Retail	9 864	102 787	167	1728	9.60%	9.66%
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Market Potential Modelling

	Page
1. Population	1
2. Economically Active Population	1
3. Average Earnings	2
4. Household Size and Income	4
5. Shopping Population	6
6. Expenditure levels	7
7. Propensity to spend at the new centre	8
8. Market Potential 2011	9
9. Market Potential Summary	10
10. Detailed Model Tabulations	10
Existing Market in Hermanus 2011	11
Forecast market potential 2011	12
Forecast market potential 2013	13
Forecast market potential 2016	14
Forecast market potential 2019	15
Forecast market potential 2024	16

Market Potential Modelling

1. Population

Population growth in the primary and secondary areas is projected to grow at slightly lower rates than was seen between 2001 and 2011, partly because growth is off a larger base each year but also because economic conditions are expected to be somewhat more constrained over this period.

Population Growth Rates Per Annum

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
2001-2011	6.20%	6.45%	6.20%	3.80%	4.20%	5.40%	1.00%	1.00%
2011-2013	5.00%	5.00%	5.00%	3.77%	3.50%	4.00%	2.00%	2.00%
2013-2016	4.80%	4.80%	4.80%	3.50%	3.50%	3.50%	2.50%	2.50%
2016- 2019	4.50%	4.50%	4.50%	3.20%	3.20%	3.20%	2.50%	2.50%
2019- 2024	4.00%	4.00%	4.00%	3.20%	3.20%	3.20%	2.50%	2.50%

Projected Population Levels

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
2011	10 147	38 282	33 962	7 986	34 253	35 532	216	384
2013	11 187	42 206	37 443	8 600	36 693	38 432	225	400
2016	12 876	48 580	43 098	9 535	40 682	42 610	242	430
2019	14 694	55 438	49 182	10 479	44 714	46 833	261	463
2024	17 877	67 449	59 837	12 267	52 341	54 821	295	524

2. Economically Active Population

The economically active population is generally considered to include people between the ages of 16 and 60, and unemployment levels are calculated by relating the number of unemployed against the economically active population.

Not everyone in society in that 16 to 60 age group is in the "job market" however, for traditional cultural reasons as well as practicality. In most societies, a mother with young children, for example, would generally prefer not to work if the family's circumstances would permit.

Over the past few decades, working patterns have been changing, with the working population steadily growing as a percentage of the "economically active"

In this study we have assumed that the working population or more correctly "Earners" will grow at around 0.2% per annum. This is a slow growth rate, and does not impact significantly on the results.

Projected Economically Active Population Levels

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
2011	5 495	22 870	22 150	4 662	20 289	22 406	123	229
2013	6 058	25 215	24 420	5 021	21 734	24 234	128	239
2016	7 016	29 242	28 319	5 598	24 280	27 078	139	259
2019	8 021	33 509	32 464	6 163	26 798	29 902	150	280
2024	9 776	40 917	39 647	7 227	31 485	35 139	170	310

Projected number of Earners

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
2011	6 394	18 280	14 534	5 960	18 845	17 711	121	183
2013	7 035	20 058	15 889	6 405	20 104	19 023	125	190
2016	8 132	23 159	18 256	7 130	22 375	21 092	135	205
2019	9 281	26 438	20 717	7 838	24 615	23 098	146	221
2024	11 293	32 160	25 063	9 176	28 825	26 932	165	250

The table below shows that amongst the AB LifePlane group in both the Primary and Secondary catchment areas, the Non - Earners as a percentage of the Economically Active portion of the population is negative. This indicates a high level of older people (over 60 years) who are still working, or earning an income. Bearing in mind the relatively old age profile of the area and the number of retirement estates, this is not surprising.

Non - Earners as a % of Economically Active Population

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
2011	-16.4%	20.1%	34.4%	-27.8%	7.1%	21.0%	1.9%	20.1%
2013	-16.1%	20.5%	34.9%	-27.6%	7.5%	21.5%	2.2%	20.5%
2016	-15.9%	20.8%	35.5%	-27.4%	7.8%	22.1%	2.4%	20.8%
2019	-15.7%	21.1%	36.2%	-27.2%	8.1%	22.8%	2.7%	21.1%
2024	-15.5%	21.4%	36.8%	-27.0%	8.4%	23.4%	2.9%	21.4%

3. Average Earnings

As with the population figures, information on wages and salaries was based on the 2001 census, adjusted to account for under-reporting, and projected to the present time based on data from the SA Reserve Bank economic reports as well as surveys conducted by the Bureau of Market Research and ourselves.

Future estimates of earnings were based on relative changes in living standards as shown in the table below. This reflects real growth in earnings, ie increases over and above the inflation rate.

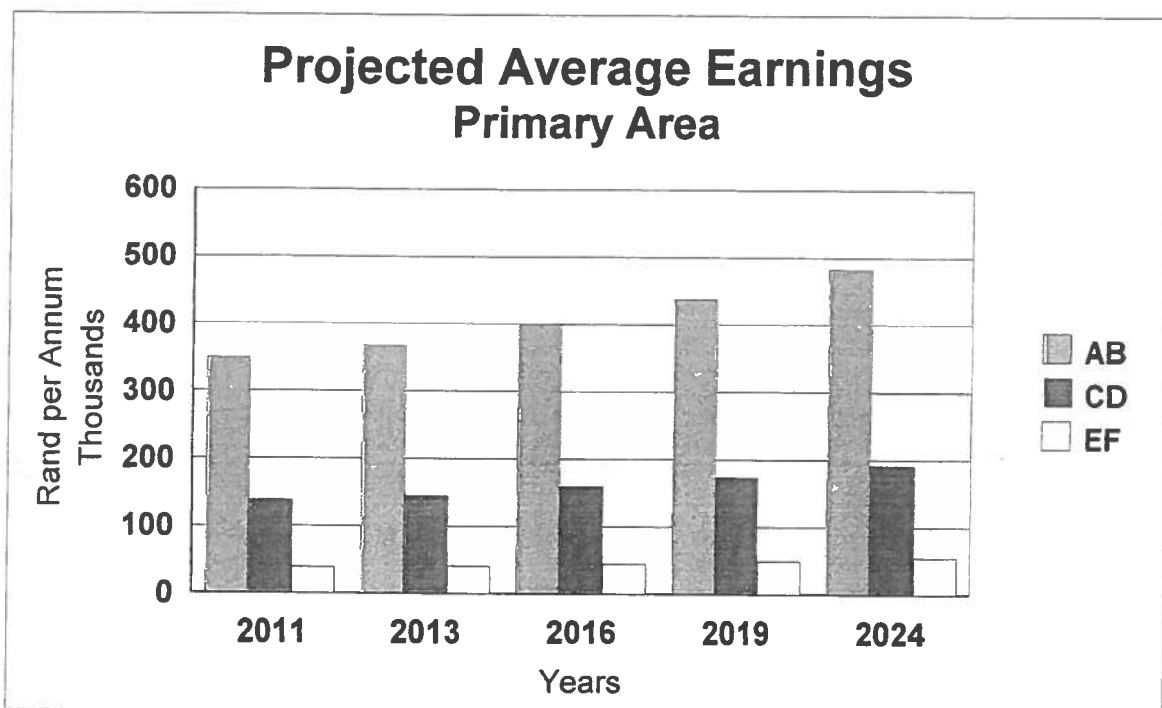
Projected Real Growth in Average Earnings

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
2013	2.5%	2.5%	2.7%	2.5%	2.5%	2.7%	2.5%	2.5%
2016	3.0%	3.0%	3.2%	3.0%	3.0%	3.2%	3.0%	3.0%
2019	3.0%	3.0%	3.2%	3.0%	3.0%	3.2%	3.0%	3.0%
2024	2.0%	2.0%	2.2%	2.0%	2.0%	2.2%	2.0%	2.0%

Projected Average Annual Earnings

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
2011	349 000	138 000	39 000	212 000	126 000	40 000	419 000	349 000
2013	367 000	145 000	41 000	223 000	132 000	42 000	440 000	367 000
2016	401 000	159 000	45 000	243 000	145 000	47 000	481 000	401 000
2019	438 000	174 000	49 000	266 000	158 000	51 000	525 000	438 000
2024	483 000	192 000	55 000	293 000	174 000	57 000	580 000	483 000

Data rounded



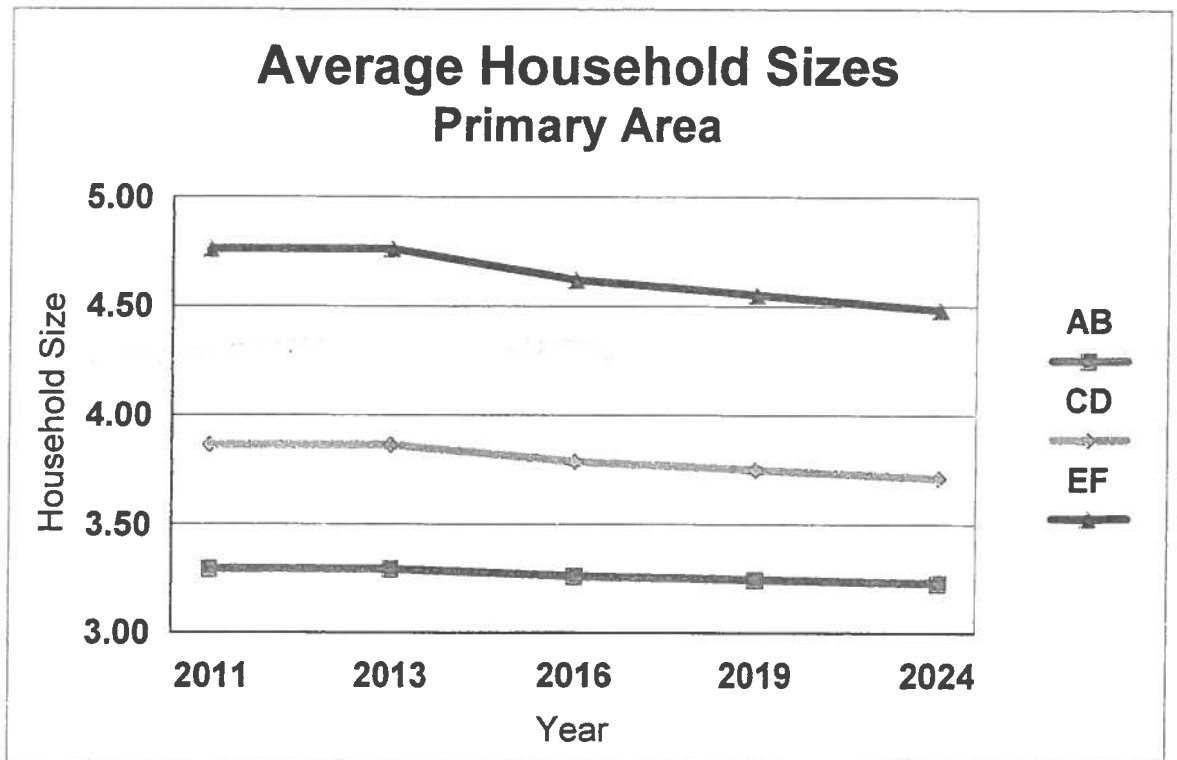
4. Household Size and Income

Household sizes have been steadily getting smaller as families choose to have less children, and this trend is likely to continue, particularly amongst the lower socio - economic groups as their education levels and living standards improve. The table below shows the household size levels projected for the study area.

Household Size

Average Household Size

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
2011	3.29	3.86	4.76	3.42	3.87	4.70	3.58	3.86
2013	3.29	3.86	4.76	3.42	3.87	4.70	3.58	3.86
2016	3.26	3.79	4.62	3.39	3.80	4.56	3.52	3.79
2019	3.24	3.75	4.55	3.37	3.76	4.49	3.50	3.75
2024	3.23	3.71	4.48	3.35	3.72	4.43	3.47	3.71

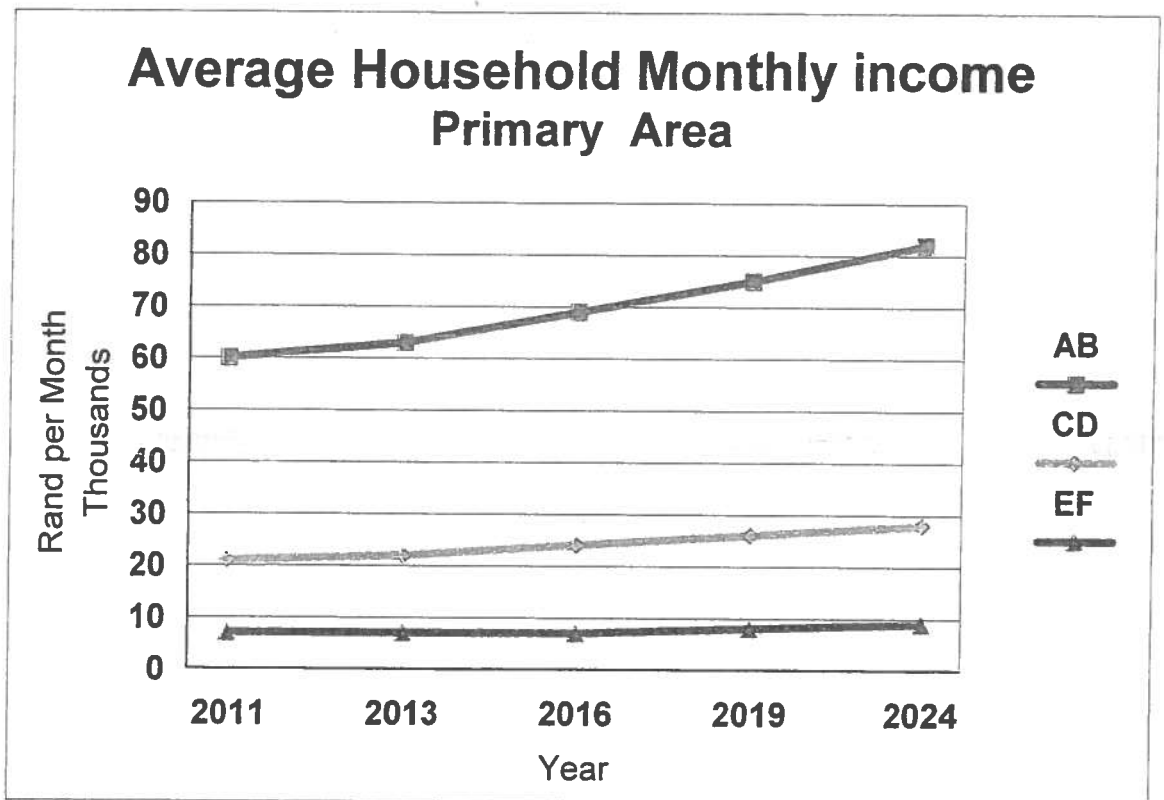


Income

The table and graph below shows the average monthly income levels projected for people living in the study area over the period .

Household Monthly Income

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
2011	60 000	21 000	7 000	45 000	22 000	8 000	70 000	54 000
2013	63 000	22 000	7 000	47 000	23 000	8 000	73 000	56 000
2016	69 000	24 000	7 000	51 000	25 000	9 000	79 000	60 000
2019	75 000	26 000	8 000	56 000	27 000	9 000	86 000	65 000
2024	82 000	28 000	9 000	61 000	30 000	10 000	94 000	71 000



5. Shopping Population

Not everyone in the study area will shop at the proposed new centre. There will be a proportion of people who will not patronise the centre in any given year. This ratio will vary by population group, Life Plane, Age group and location. For the purpose of this study we have assumed that the site will be fairly centrally located and with easy access from Zwellihle, Mount Pleasant and Hawston.

The percentage of people likely to shop at the centre at least once a year is given in the table below. These figures are not expected to change over the forecast period, and reflect a mature, equilibrium position.

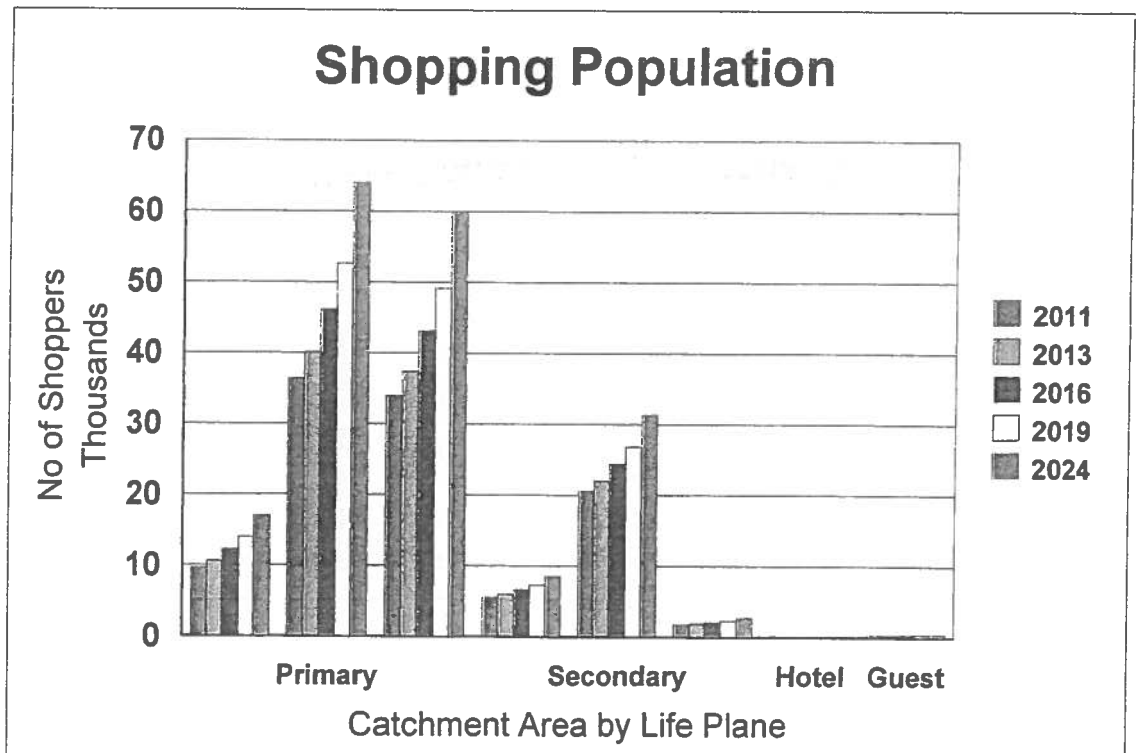
Percentage of Residents who will shop at the Centre

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
All Forecast Years	95	95	100	70	60	5	60	90

The Shopping population estimates are shown in the table and graph below

Shopping Population

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
2011	9 639	36 368	33 962	5 590	20 552	1 777	130	346
2013	10 627	40 096	37 443	6 020	22 016	1 922	135	360
2016	12 232	46 151	43 098	6 674	24 409	2 131	145	387
2019	13 959	52 666	49 182	7 336	26 828	2 342	156	417
2024	16 983	64 077	59 837	8 587	31 405	2 741	177	472



6. Expenditure Levels

The amount that people spend on retail goods and services varies by Lifeplane and Lifestage. In this study we have provided separate forecasts of population growth for the different Lifeplanes, but have made the assumption that the general age profile of resident will not alter sufficiently over the forecast period. The table and graph below show the percentage of income spent by category, according to their Lifeplane and income level.

Expenditure as a Percentage of Income for the year 2011

Years	Primary			Secondary			Hotel Guests	Guest Houses
	AB	CD	EF	AB	CD	EF		
Food & Groceries	10.25	15.00	27.00	11.80	15.00	25.00	15.15	15.66
Clothing & Footwear	3.44	4.40	6.80	3.74	4.40	6.30	5.09	5.01
Furniture & Appliances	3.83	4.70	3.70	4.17	4.70	3.68	5.65	5.57
All other retail Goods	4.13	5.14	6.70	4.50	5.14	6.50	6.11	6.01
Consumer Services	3.89	4.80	5.20	4.24	4.80	5.00	5.75	5.66

The expenditure percentages do change over the forecast years as the income level of shoppers changes. Please see the detail tables for further information

