

Table 2.1
Distribution of Expenditure by Location

Details	Location	Total	Primary Area			Secondary Area		Primary	Secondary
			AB	CD	EF	AB	CD		
		%	%	%	%	%	%	%	
Food and Groceries	Hermanus	59	87	79	78	22	21	82	22
	Other Local	29	3	13	13	55	64	9	60
	Over the Mountain	12	10	8	9	23	15	9	18
	Total	100	100	100	100	100	100	100	100
Clothing & Footwear	Hermanus	50	62	71	84	22	22	69	22
	Other Local	15	3	5	6	22	36	5	30
	Over the Mountain	35	35	24	10	56	42	26	48
	Total	100	100	100	100	100	100	100	100
Furniture	Hermanus	45	54	67	78	11	14	64	13
	Other Local	21	4	6	15	37	56	6	47
	Over the Mountain	34	42	27	7	52	30	30	40
	Total	100	100	100	100	100	100	100	100
Household Goods	Hermanus	56	71	80	84	19	25	78	23
	Other Local	21	4	9	11	32	50	7	42
	Over the Mountain	23	25	11	5	49	25	15	35
	Total	100	100	100	100	100	100	100	100
Electrical Appliances	Hermanus	51	64	78	86	12	18	74	15
	Other Local	22	2	5	8	39	57	5	50
	Over the Mountain	27	34	17	6	49	25	22	35
	Total	100	100	100	100	100	100	101	100
Electronic Goods	Hermanus	38	48	64	75	7	7	59	8
	Other Local	15	3	3	15	25	40	4	33
	Over the Mountain	47	49	33	10	68	53	37	59
	Total	100	100	100	100	100	100	100	100
Sporting Goods and Equipment	Hermanus	47	62	72	65	17	11	67	14
	Other Local	17	4	7	29	19	43	8	32
	Over the Mountain	36	34	22	6	64	46	25	54
	Total	100	100	101	100	100	100	100	100
Toys, Hobbies and games	Hermanus	49	63	71	87	13	17	71	15
	Other Local	18	5	12	8	24	45	8	36
	Over the Mountain	33	32	17	5	63	38	21	49
	Total	100	100	100	100	100	100	100	100
Jewellery, Watches etc	Hermanus	45	59	67	84	13	18	67	16
	Other Local	22	6	8	12	30	48	8	41
	Over the Mountain	33	35	25	4	57	34	25	43
	Total	100	100	100	100	100	100	100	100
Camping & Outdoor equipment	Hermanus	36	45	60	67	4	6	55	5
	Other Local	16	6	9	24	17	37	9	27
	Over the Mountain	48	50	31	9	79	57	36	68
	Total	100	100	100	100	100	100	100	100
Books & Stationery	Hermanus	59	83	84	95	20	16	85	18
	Other Local	26	2	9	5	46	64	6	56
	Over the Mountain	15	15	7	0	34	20	9	26
	Total	100	100	100	100	100	100	100	100
Wine & Spirits	Hermanus	56	79	85	73	17	17	80	16
	Other Local	36	13	10	23	78	79	14	71
	Over the Mountain	8	8	5	4	5	4	6	13
	Total	100	100	100	100	100	100	100	100
Personal Care Products	Hermanus	58	81	86	81	19	16	83	18
	Other Local	39	8	9	16	56	67	10	62
	Over the Mountain	12	11	5	3	25	15	7	20
	Total	100	100	100	100	100	98	100	100
Restaurants	Hermanus	60	86	84	78	25	26	83	26
	Other Local	25	4	9	13	46	54	8	50
	Over the Mountain	15	10	7	9	29	20	9	24
	Total	100	100	100	100	100	100	100	100
Cinemas and Live shows	Hermanus	26	30	42	58	4	3	38	3
	Other Local	7	3	9	22	6	7	7	7
	Over the Mountain	67	67	49	20	90	90	54	90
	Total	100	100	100	100	100	100	100	100

Table 2.2

Percentage of Expenditure spent "over the mountain"

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
	%	%	%	%	%	%	%	%
Cinemas and Live shows	67	67	49	20	90	90	54	90
Camping & Outdoor equipment	48	50	31	9	79	57	36	68
Electronic Goods	47	49	33	10	68	53	37	59
Sporting Goods	36	34	22	6	64	46	25	54
Clothing & Footwear	35	35	24	10	56	42	26	48
Furniture	34	42	27	7	52	30	30	40
Toys, Hobbies and games	33	32	17	5	63	38	21	49
Jewellery, Watches etc.	33	35	25	4	57	34	25	43
Electrical Appliances	27	34	17	6	49	25	22	35
Household Goods	23	25	11	5	49	25	15	35
Books & Stationery	15	15	7	0	34	20	9	26
Restaurants	15	10	7	9	29	20	9	24
Food and Groceries	12	10	8	9	23	15	9	18
Personal Care Products	12	11	5	3	25	15	7	20
Wine & Spirits	8	8	5	4	5	4	6	13

Table 3

Products and Services bought 'over the mountain'

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Clothing	18.6%	16.4%	16.0%	23.3%	13.9%	26.2%	17.6%	19.4%
Home Appliances & Electrical goods	7.6%	4.8%	7.6%	14.7%	12.0%	5.5%	7.4%	7.9%
Cinema	7.6%	10.3%	7.6%	0.0%	6.6%	9.7%	7.4%	7.9%
Food & Groceries	7.6%	6.2%	6.1%	14.7%	7.8%	6.9%	7.4%	6.7%
Furniture	5.5%	8.9%	5.3%	8.5%	2.4%	3.4%	7.4%	3.0%
Electronic Goods	2.8%	1.4%	2.3%	0.0%	4.2%	3.4%	1.5%	3.6%
Camping Equipment	2.8%	2.7%	3.8%	0.0%	4.2%	0.7%	2.9%	2.4%
Medical facilities	2.8%	7.5%	0.8%	0.0%	1.8%	4.1%	3.7%	2.4%
Computer equipment	2.1%	2.1%	3.1%	0.0%	3.0%	2.1%	2.2%	2.4%
Theatre & Live shows	2.1%	4.1%	3.1%	0.0%	1.2%	1.4%	2.9%	1.2%
Shoes	2.1%	1.4%	0.0%	0.0%	6.6%	2.8%	0.7%	4.2%
Butchery / meat	2.1%	2.1%	2.3%	4.7%	0.6%	0.7%	2.9%	0.6%
Bedding	1.4%	0.0%	0.0%	0.0%	1.8%	4.8%	0.0%	3.0%
Home & interior decor	1.4%	2.7%	0.0%	0.0%	1.2%	3.4%	1.5%	2.4%
Entertainment	1.4%	2.7%	0.6%	0.0%	0.6%	2.8%	1.5%	1.8%
Musical equipment	1.4%	0.0%	0.0%	8.5%	3.0%	1.4%	1.5%	1.8%
Cosmetics & Skin care products	1.4%	1.4%	3.1%	0.0%	0.0%	2.8%	1.5%	1.2%
Sports equipment	1.4%	1.4%	0.8%	0.0%	1.2%	2.1%	0.7%	1.8%
Haberdashery	1.4%	2.7%	0.0%	0.0%	1.8%	1.4%	0.7%	1.2%
Building Supplies	1.4%	2.1%	0.8%	2.3%	0.0%	0.7%	1.5%	0.6%
Specials and sales	1.4%	0.7%	0.8%	6.2%	0.0%	1.4%	1.5%	0.6%
Restaurants	0.7%	0.7%	0.8%	0.0%	0.6%	0.7%	0.7%	0.6%
Books	0.7%	1.4%	0.8%	0.0%	2.4%	0.7%	0.7%	1.2%
Vehicle servicing and spares	0.7%	0.0%	0.8%	0.0%	1.2%	1.4%	0.7%	1.2%
Toys and games	0.7%	0.7%	0.0%	0.0%	2.4%	1.4%	0.0%	1.8%
Other	4.1%	5.5%	2.3%	0.0%	5.4%	6.2%	2.9%	5.5%
Nothing Specific	15.9%	10.3%	31.3%	17.1%	6.6%	1.4%	20.6%	9.7%
Basically everything	1.4%	0.0%	0.0%	0.0%	7.2%	0.7%	0.0%	3.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NB: Please note that the table above reflects the incidence of mention and not the distribution of expenditure

Table 4.1

Food and Grocery stores used during the past month (June)

Details	Base	Total	Primary Area			Secondary Area		Primary	Secondary
			AB	CD	EF	AB	CD		
			%	%	%	%	%		
Base	44 451	44 451	10 370	12 086	4 357	7 671	10 038	25 742	17 709
Pick n Pay	24 864	56.0	81.0	73.0	74.0	34.0	18.0	76.0	25.0
Checkers	17 397	39.0	44.0	27.0	42.0	46.0	42.0	36.0	43.0
Super Spar	16 381	37.0	64.0	58.0	42.0	5.0	6.0	58.0	5.0
Spar	13 044	29.0	2.0	0.0	5.0	67.0	74.0	2.0	71.0
U- Save	4 800	10.0	0.0	17.0	11.0	9.0	14.0	9.0	11.0
OK Foods	4 054	9.0	0.0	0.0	0.0	15.0	29.0	0.0	23.0
York Cash & Carry	4 197	9.0	5.0	21.0	23.0	0.0	0.0	15.0	0.0
Woolworths	3 158	7.0	14.0	4.0	0.0	12.0	3.0	7.0	7.0
Fruit & Veg City	2 388	5.0	11.0	4.0	0.0	7.0	2.0	6.0	5.0
Other	1 730	4.0	1.0	6.0	3.0	6.0	3.0	4.0	4.0
Shoprite	1 607	4.0	0.0	0.0	24.0	3.0	3.0	4.0	3.0
Price Club	1 001	2.0	0.0	0.0	0.0	8.0	4.0	0.0	6.0

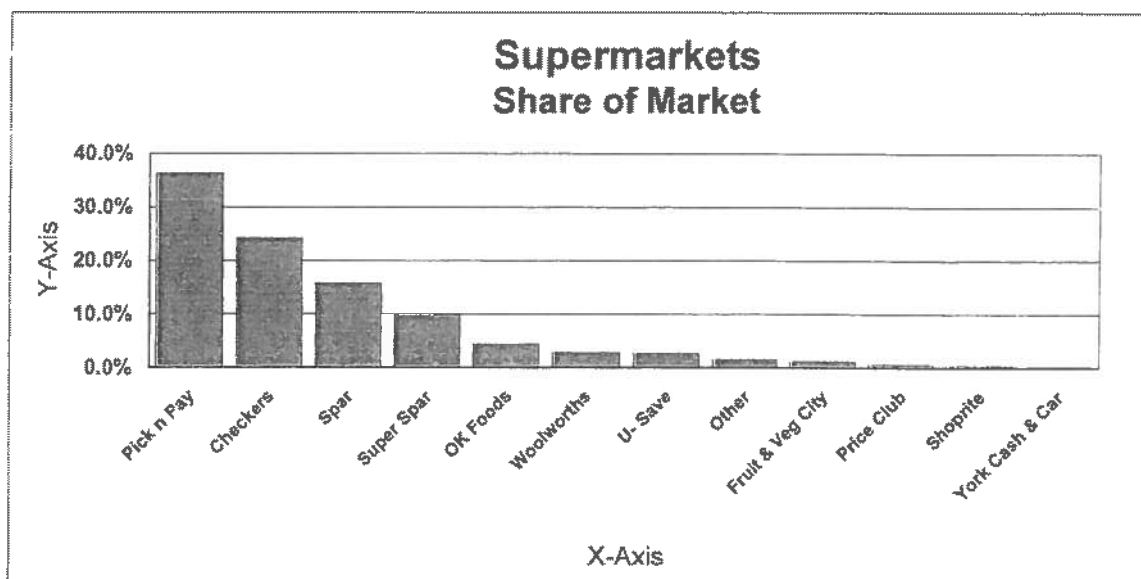
The table above shows the percentage of shoppers using each store. Of the base number of 10 370 AB Life Plane shoppers, 81% shopped at Pick n Pay and 44% shopped at Checkers in the past month.

Table 4.2

Share of spend at grocery stores during the past month (June)

Details	Base	Total	Primary Area			Secondary Area		Primary	Secondary
			AB	CD	EF	AB	CD		
			%	%	%	%	%		
Pick n Pay		38.4%	46.7%	53.6%	43.8%	21.8%	12.9%	50.1%	17.2%
Checkers		24.2%	22.3%	21.2%	19.6%	24.8%	25.9%	22.0%	25.7%
Spar		15.8%	0.4%	0.0%	5.2%	30.4%	35.8%	0.9%	33.7%
Super Spar		9.8%	16.0%	18.1%	15.1%	1.1%	6.2%	16.1%	2.5%
OK Foods		4.4%	0.0%	0.2%	0.0%	6.5%	11.8%	0.1%	9.5%
Woolworths		2.8%	4.5%	0.5%	0.0%	4.0%	0.9%	2.4%	2.6%
U- Save		2.7%	0.0%	3.5%	13.3%	2.8%	4.0%	2.5%	4.0%
Other		1.5%	0.5%	2.8%	1.2%	2.4%	0.8%	1.4%	1.6%
Fruit & Veg City		1.1%	4.4%	0.0%	0.0%	3.1%	0.6%	1.5%	1.3%
Price Club		0.6%	0.0%	0.0%	0.0%	2.6%	1.3%	0.0%	1.3%
Shoprite		0.4%	0.2%	0.0%	1.8%	0.6%	0.7%	0.3%	0.7%
York Cash & Carry		0.2%	3.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%
Total		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

The table above shows the share of spend at each brand irrespective of location. This table is based on the total weighted population and represents each brand's estimated market share amongst the study area population.



The table below shows the base number of shoppers at each store (in bold) and the percentage of those shoppers who used each particular location of that store. So for Pick n Pay, it can be seen that 92% of the shoppers using Pick n Pay, used the Hermanus store. The average spend by all shoppers at Pick n Pay was R1295 in the past month, with AB Life Plane people spending an average of R1419 at the store.

Table 4.3

Food and Grocery stores used during the past month (June)

Details	Base	Total	Primary Area			Secondary Area		Primary	Secondary
			AB	CD	EF	AB	CD		
Pick n Pay	24 864	24 864	8 447	8 719	3 250	2 635	1 814	20 416	4 448
Hermanus	22936	92	100	100	100	57	59	100	58
Somerset West	2176	9	3	0	0	50	34	1	43
Cape Town (cbd)	204	1	0	0	0	3	7	0	5
Stellenbosch	70	0	0	0	0	3	0	0	2
Tygervalley	105	0	0	0	0	0	6	0	2
Worcester	70	0	0	0	0	3	0	0	2
Average amount spent		1 295	1 419	1 203	825	1 548	1 557	1 234	1 551
Checkers	17307	17 307	4 511	3 220	1 855	3 509	4 211	9 586	7 720
Hermanus	11639	67	100	100	73	35	32	94	33
Bredasdorp	4781	28	0	0	0	57	68	0	62
Somerset West	318	2	0	0	0	7	2	0	4
Cape Gate	70	1	0	0	0	2	0	0	1
Tamboerskloof	235	1	0	0	0	7	0	0	3
Worcester	573	3	0	0	27	2	0	5	1
Amount Spent		1 237	1 270	1 290	645	1 320	1 345	1 156	1 333
Price Club	1001	1 001	0	0	0	614	387	0	1 001
Bredasdorp	610	61	0	0	0	75	39	0	61
Caledon	391	39	0	0	0	25	61	0	39
Amount Spent		528	0	0	0	780	723	0	528
Super Spar	16381	16 381	6 634	6 963	1 814	381	889	15 411	870
Hermanus	16085	98	100	100	100	60	76	100	70
Bredasdorp	152	93	0	0	0	40	0	0	16
Gansbaai	143	1	0	0	0	0	24	0	15
Amount Spent		532	697	509	508	516	1 940	527	1 013
Spar	13 044	13 044	199	42	202	5 160	7 441	443	12 601
Bredasdorp	3 359	26	0	0	0	19	32	0	27
Caledon	2 739	21	0	0	0	27	16	0	22
Eastcliff	370	3	100	100	64	0	0	84	0
Gansbaai	3 863	30	0	0	36	20	38	16	30
Gordons Bay	87	1	0	0	0	2	0	0	1
Kleinmond	1 970	15	0	0	0	29	6	0	16
Stanford	636	5	0	0	0	3	6	0	5
Amount Spent		1 072	502	203	1 567	1 100	1 054	1 060	1 073
Woolworths	3156	3 156	1 400	486	0	958	314	1 866	1 271
Hermanus	2826	90	100	100	0	65	100	100	74
Somerset West	479	15	0	0	0	100	0	0	38
Amount Spent		788	616	192	0	782	650	645	808
Fruit & Veg City	2308	2 308	1 115	466	0	560	247	1 581	807
Hermanus	1873	78	100	100	0	41	26	100	36
Somerset West	410	17	0	0	0	59	32	0	51
Tygervalley	105	4	0	0	0	0	43	0	13
Amount Spent		549	1 006	0	0	1 025	573	491	629
DK Foods	3926	3 926	0	42	0	1 183	2 701	42	3 884
Gansbaai	3139	80	100	0	72	83	0	100	80
Kleinmond	366	9	0	0	0	19	5	0	9
Napier	378	10	0	0	0	0	14	0	10
Struisbaai	420	11	0	0	0	9	12	0	11
Amount Spent		986	0	1 025	0	1 020	980	1 025	985
Shoptite	616	616	42	0	73	218	284	115	501
Grabouw	78	13	0	0	0	0	28	0	16
Parow	80	13	0	0	0	0	28	0	16
Somerset West	319	52	100	0	100	36	44	100	41
Worcester	139	23	0	0	0	100	0	0	28
Amount Spent		538	1 025	0	1 525	513	527	1 482	523
U- Save	5491	5 491	0	1 981	1 485	670	1 355	3 466	2 024
Bredasdorp	736	13	0	0	0	42	34	0	36
Caledon	939	17	0	0	0	58	40	0	46
Gansbaai	350	6	0	0	0	0	26	0	17
Hermanus	3466	63	0	100	100	0	0	100	0
Amount Spent		433	0	350	550	793	650	369	787
York Cash & Carry	4107	588	2 548	980	0	0	0	4 107	0
Hermanus (Zwelihle)	4107	100	100	100	0	0	0	100	0
Amount Spent		307	307	0	0	0	0	307	0
Other	1573	1 673	149	676	73	458	308	896	777
Brackenfall	176	11	72	0	0	15	0	12	9
Hawston	73	4	0	0	100	0	0	8	0
Hermanus	42	3	28	0	0	0	0	5	0
Kleinmond	87	5	0	0	0	19	0	0	11
L'Agulhas	210	13	0	0	0	22	34	0	27
Napier	252	15	0	0	0	27	41	0	32
Onrus	107	6	0	16	0	0	0	12	0
Somerset West	726	43	0	84	0	17	25	63	20
Amount Spent		809	810	802	1 025	968	587	806	818

The table below shows the overall share of spend of the study area residents at Clothing and Footwear stores during the three months to the end of June 2011. It should be noted that 7% of respondents made no purchases in this category during that period.

Table 5
Share of Spend at Clothing and Footwear stores during the second quarter 2011

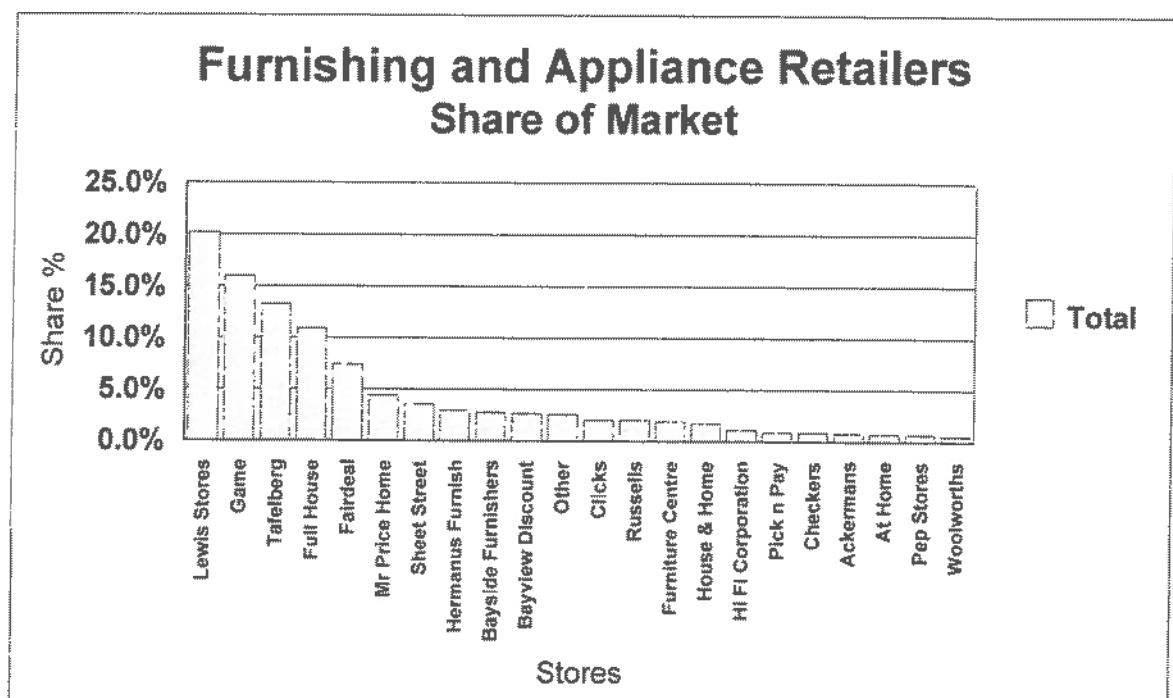
Details	Base	Total	Primary Area			Secondary Area		Primary	Secondary
			AB	CD	EF	AB	CD		
Total	44 451	44 451	10 370	12 008	4 367	7 871	10 038	26 743	17 709
	%	%	%	%	%	%	%	%	%
Edgars	9 819	15.6%	21.2%	15.0%	20.0%	12.2%	9.6%	17.9%	10.6%
Woolworths	10 327	14.9%	19.4%	9.7%	0.0%	19.7%	21.4%	14.6%	20.7%
All others	6 060	14.5%	7.5%	22.8%	0.9%	21.7%	6.3%	12.1%	15.7%
Mr Price	9 015	11.1%	11.3%	7.0%	14.1%	10.4%	15.0%	8.8%	14.0%
Foschini	8 189	8.8%	10.3%	5.2%	8.8%	9.4%	18.5%	6.2%	12.8%
Ackermans	6 478	7.6%	1.6%	11.8%	21.0%	2.6%	8.2%	10.1%	4.8%
Markham	3 098	6.0%	8.0%	8.0%	6.4%	9.3%	1.0%	8.1%	4.5%
Milady's	5 195	5.0%	7.4%	4.1%	5.8%	3.3%	4.0%	5.1%	3.9%
Jet	2 178	4.1%	0.2%	3.7%	12.8%	2.6%	3.2%	3.5%	2.9%
Pep Stores	5 402	4.1%	3.2%	4.8%	8.9%	1.0%	8.0%	4.3%	4.3%
Truworths	2 083	3.9%	4.0%	4.5%	0.0%	5.2%	2.4%	3.6%	3.8%
Ally Shoe Store	480	2.2%	4.1%	0.8%	0.0%	0.0%	0.0%	3.8%	0.0%
Pick n Pay Clothing	1 686	1.3%	1.6%	2.2%	0.0%	2.4%	0.0%	1.6%	1.2%
Total Sports	496	0.7%	0.1%	0.2%	1.3%	0.5%	1.3%	0.2%	0.9%
Total		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Table 6

Share of Spend at Furniture, Housewares and Appliances stores during the year to June 201
25% of respondents made no purchases in this category.

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Lewis Stores	20.2%	0.2%	1.5%	72.1%	8.6%	20.4%	2.2%	16.3%
Game	16.0%	16.8%	7.9%	1.8%	23.4%	12.7%	13.6%	20.3%
Tafelberg	13.3%	31.2%	12.5%	0.0%	14.1%	21.9%	14.6%	12.0%
Full House	10.9%	0.0%	44.0%	12.2%	0.0%	1.8%	22.6%	1.0%
Fairdeal	7.4%	0.8%	22.0%	3.5%	0.8%	8.4%	12.3%	5.5%
Mr Price Home	4.4%	5.1%	3.2%	3.2%	5.9%	3.5%	5.2%	4.0%
Sheet Street	3.6%	5.1%	1.1%	0.0%	3.2%	5.1%	2.6%	4.7%
Hermanus Furnishers	3.0%	7.5%	0.5%	0.0%	0.0%	0.0%	6.4%	0.0%
Bayside Furnishers	2.8%	3.2%	0.0%	0.0%	33.1%	0.0%	1.4%	15.3%
Bayview Discount Furnishers	2.7%	0.0%	0.0%	0.0%	0.0%	9.4%	0.0%	5.3%
Other	2.6%	3.9%	3.0%	0.2%	2.2%	1.9%	3.4%	2.0%
Clicks	2.0%	4.8%	1.3%	0.3%	1.5%	1.6%	3.1%	1.3%
Russells	2.0%	2.5%	0.0%	0.0%	0.3%	5.2%	1.1%	3.6%
Furniture Centre	1.9%	6.9%	1.3%	0.0%	0.0%	0.0%	4.1%	0.0%
House & Home	1.7%	4.3%	0.0%	0.0%	1.7%	0.6%	1.8%	2.7%
Hi Fi Corporation	1.1%	2.2%	0.3%	0.0%	1.1%	1.2%	0.3%	1.1%
Pick n Pay	0.9%	0.9%	0.3%	3.4%	0.0%	0.3%	1.6%	0.2%
Checkers	0.9%	2.4%	0.6%	1.0%	0.4%	0.6%	1.5%	0.5%
Ackermans	0.8%	0.6%	0.2%	2.1%	0.0%	1.5%	1.1%	0.8%
At Home	0.7%	1.0%	0.4%	0.0%	0.7%	0.3%	0.7%	0.4%
Pep Stores	0.7%	0.0%	0.0%	0.3%	2.0%	2.8%	0.1%	2.1%
Woolworths	0.5%	0.7%	0.0%	0.0%	1.1%	0.8%	0.3%	0.8%
Total	100%	100%	100%	100%	100%	100%	100%	100%



The table above shows that patterns of support vary considerably between Life Planes.

Table 7.1
Attitudes to proposed new Toll Plaza's

Question 6 (a) Will the new Toll Plaza's reduce your frequency of travel over the mountain.

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44 451	10 370	12 006	4 367	7 671	10 038	26 742	17 709
	%	%	%	%	%	%	%	%
Yes it will	55	62	53	53	50	55	57	53
No it will not	35	28	30	32	47	40	29	43
I dont know	10	10	17	15	3	5	14	4
Total	100	100	100	100	100	100	100	100

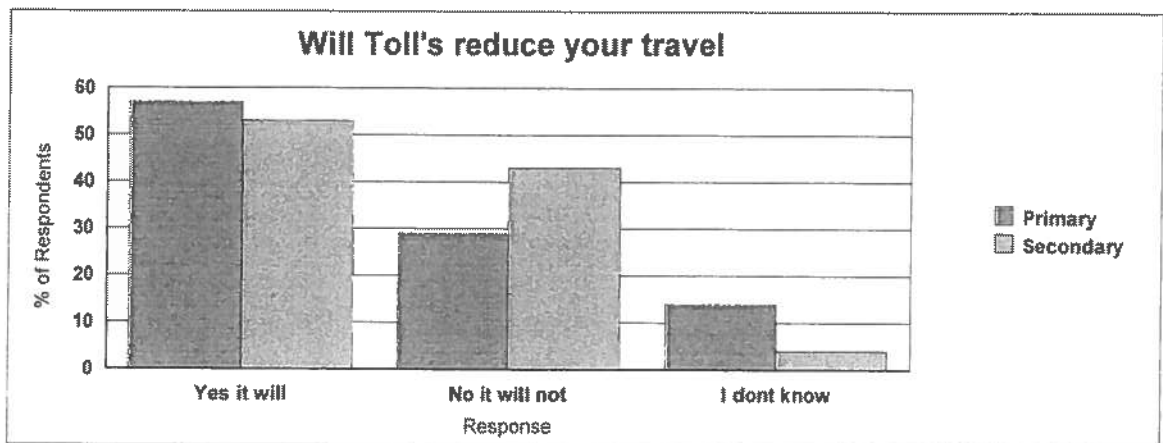


Table 7.2
Attitudes to proposed new Toll Plaza's

Question 6(b) Do you think the new Toll Plaza's will reduce the amount that you spend over the mountain?

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44 451	10 370	12 006	4 367	7 671	10 038	26 742	17 709
	%	%	%	%	%	%	%	%
Yes it will	55	54	56	66	46	56	57	52
No it will not	35	34	27	32	49	38	31	43
I dont know	10	12	17	2	5	6	12	5
Total	100	100	100	100	100	100	100	100

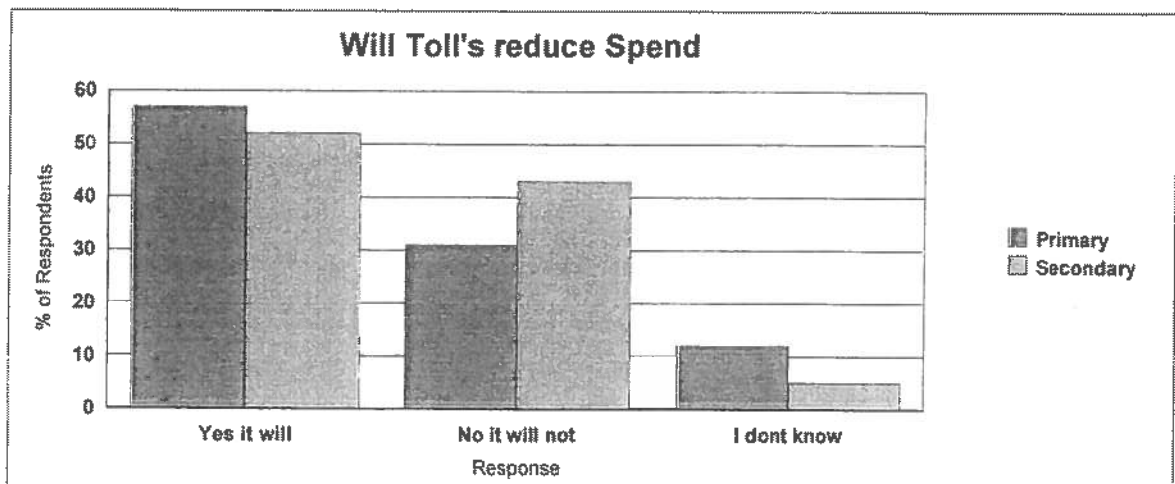


Table 8.1
Attitude to Proposed One -Stop shopping centre in Hermanus

Question 7(a) If there was a one stop shopping centre in Hermanus with a wide variety of stores under one roof, such as a smaller Somerset Mall : including Game , a full Woolworths and a wide selection of national and other chains, how would you feel about that? Do you think it would be a good idea?

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44 451	10 370	12 606	4 367	7 671	10 038	26 742	17 709
	%	%	%	%	%	%	%	%
A very good idea	69	63	81	78	51	70	74	62
A good idea	20	19	15	22	27	23	17	24
Not such a good idea	7	12	2	0	15	6	6	10
A bad idea	4	6	2	0	7	1	3	4
Total	100	100	100	100	100	100	100	100

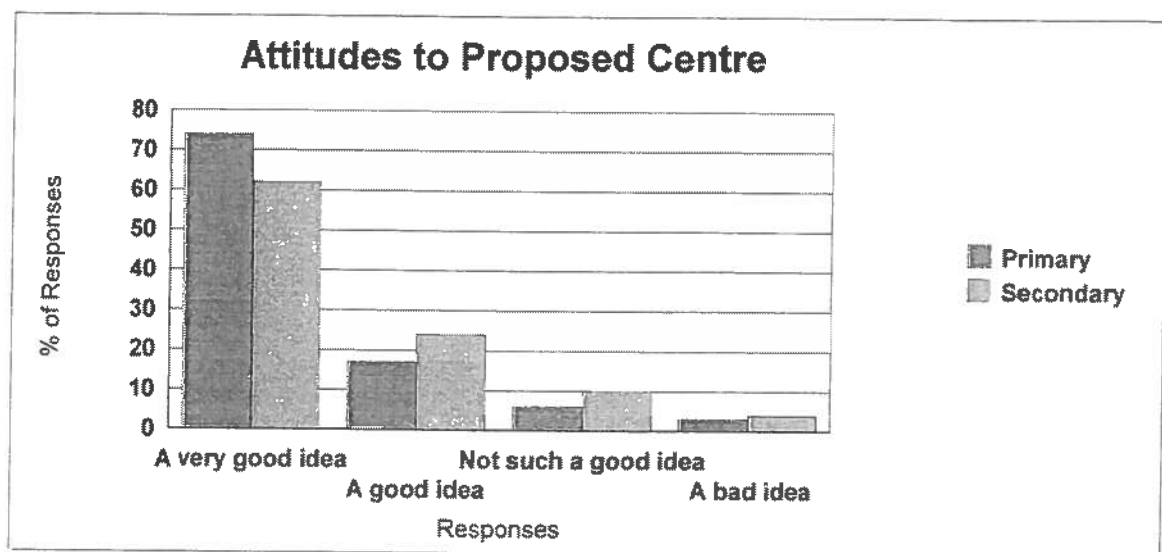


Table 8.2

Question 7(b): Why do you say that? (Positive responses)

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	39 892	8 428	11 665	4 367	6 933	9 300	24 366	16 332
	%	%	%	%	%	%	%	%
Hermanus needs a proper Centre	46	48	54	47	43	39	50	41
Need for additional shops	39	40	41	49	34	37	43	35
All Other	2	3	1	0	3	4	2	4
Close to Home	6	3	0	3	11	11	2	11
Reduce travel costs	3	2	3	2	4	5	2	5
more variety and range	2	1	1	0	3	2	1	2
Everything under one roof	2	3	0	0	2	2	1	2
Total	100	100	100	100	100	100	100	100

Table 8.3

Question 7(b): Why do you say that? (Negative responses)

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	4 994	1 960	483	0	1 874	738	2 383	2 611
	%	%	%	%	%	%	%	%
There is no need for more shops	47	52	51	0	41	52	52	44
A big centre will damage the CBD	43	44	40	0	50	23	43	42
Other mentions	9	4	9	0	9	25	5	13
Total	100	100	100	0	100	100	100	100

Table 9

Expected reduction in Expenditure "over the mountain"

Question 8: If such a shopping centre were to be built, to what extent do you think it would reduce your expenditure over the mountain?
The results show that some 60% reduction in outflow could be expected, 67% from the primary area and 50% from the secondary.

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44344	10370	11899	4367	7671	10038	26636	17709
	%	%	%	%	%	%	%	%
All (90 - 100%)	37	38	47	46	23	31	44	27
Most (60-90%)	25	27	31	18	18	24	27	22
About Half (30-60%)	11	6	12	17	9	15	10	12
Some (20-40%)	9	9	5	17	13	6	9	9
A little (Up to 20%)	4	5	1	0	11	4	2	7
Not at all	14	15	4	2	26	20	8	23
Total	100	100	100	100	100	100	100	100
Overall Weighted Response	60%	60%	73%	68%	43%	55%	67%	50%

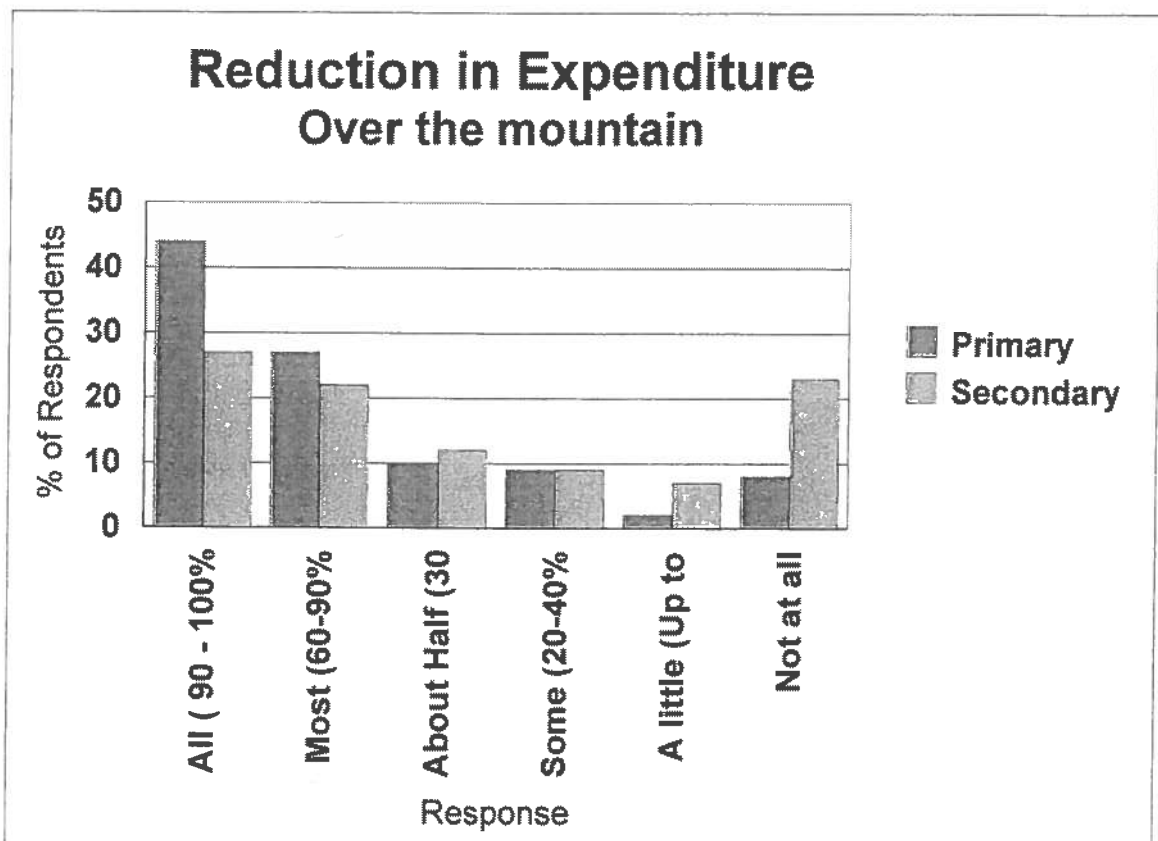


Table 10.1

Stores wanted at proposed new Mall: Food & Groceries

Question 9.1.1 Bearing in mind what shops there are in Hermanus, what specific branded stores and services would you like to have at the proposed centre

Hermanus Household Survey 2011								
Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	10370	12806	4367	7671	10038	26742	17708
	%	%	%	%	%	%	%	%
Pick n Pay	27	29	24	17	34	29	24	30
Shoprite	18	18	32	20	6	12	23	9
Checkers	15	10	11	13	22	21	10	22
Woolworths	13	22	8	2	19	10	11	14
Other	12	8	13	31	5	14	20	11
Spar	6	1	4	9	9	10	3	10
Metro	5	7	9	7	0	0	7	0
Fruit and Veg	3	4	0	0	5	4	1	4
Total	100	100	100	100	100	100	100	100



Table 10.2
Other Food stores wanted at the new Mall
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	10370	12006	4367	7671	10938	26742	17798
	%	%	%	%	%	%	%	%
Butcher	57	51	72	78	42	49	65	46
Baker	38	32	36	49	31	48	36	41
Take Away's	32	22	35	35	37	33	30	35
Farmstall	24	19	28	53	19	14	29	16
Homebakes	21	16	19	3	31	29	16	30
Coffee Shop	19	12	13	20	29	23	14	26
Dairy	17	11	32	26	14	6	23	9
Delicatessen	17	15	11	2	29	22	11	25
Health Foods	15	7	20	2	22	19	12	21
Greengrocer	14	14	8	11	23	17	11	19
Juices	13	10	12	37	8	9	15	8
Herbs and spices	10	9	10	6	10	13	9	12
None	9	11	0	0	15	17	5	17
Biltong Bar	8	11	4	0	11	12	6	12
Pet Food	8	3	10	11	9	6	8	7
Cafe	8	13	4	11	12	6	8	9
Sandwiches	7	1	5	23	8	6	6	7
Pies	6	2	8	0	8	7	5	7
Sweet shop	5	3	6	0	6	7	4	6
Total	328	262	333	367	364	343	313	353

Note: The figures above are the percentage of mentions, and show that respondents on average listed about 3 stores.



Table 10.3
Clothing & Footwear Stores
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	19370	12905	4367	7871	15038	26742	17709
	%	%	%	%	%	%	%	%
Woolworths	27	21	20	11	46	33	19	39
Edgars	27	18	25	11	36	38	20	37
Jet	25	17	44	54	7	13	35	10
Other	15	20	18	3	15	12	16	13
Mr Price	15	11	11	5	23	22	10	23
Foschini	11	1	4	14	15	26	4	21
Ackermans	11	7	7	5	17	19	6	18
Milady's	9	6	5	9	10	18	6	15
Pep	6	5	2	0	8	11	3	10
Truworths	5	5	3	2	11	6	3	9
Fashion Express	5	7	1	3	5	8	3	7
Donna Claire	5	2	3	11	4	9	4	7
Exact	4	5	6	6	2	1	5	1
Shoe City	4	6	5	0	1	3	5	2
Pick N Pay	3	4	6	2	3	1	4	2
Markham	3	2	1	0	6	6	1	7
Queenspark	3	2	3	0	4	5	2	5
Mr Price Sport	2	3	1	0	1	3	1	2
Sport Scene	2	0	0	0	4	4	0	4
Meltz	2	3	0	0	5	3	1	4
Total Sports	2	2	0	0	6	4	1	5
Cape Union Mart	2	2	2	0	8	1	1	4
Green Cross	1	1	0	0	3	1	0	2
YDE	1	1	1	0	0	1	1	1
Total	190	151	168	136	242	248	151	248



Table 10.4
Other Clothing & Footwear
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	16370	12996	4367	7671	10036	26742	17709
	%	%	%	%	%	%	%	%
Shoes	46	38	46	40	46	57	42	53
Family clothing	44	50	42	63	33	39	48	36
Ladies everyday clothing	36	32	42	21	35	39	35	38
Childrens Clothing	35	27	48	43	22	36	39	30
Menswear	28	25	22	38	37	28	26	32
Handbags, belts, hats	24	17	40	45	9	15	32	12
Sports clothing	18	12	17	17	20	23	15	22
Baby & infant shop	17	6	31	14	12	16	19	14
Ladies high fashion Clothing	16	23	15	0	19	16	16	17
Speciality boutiques - jeans etc	14	15	13	0	20	16	12	18
Lingerie	12	8	17	11	12	9	13	11
Haberdashery / Fabric	11	9	8	0	16	16	7	17
Ties, socks, shirts	10	13	10	13	8	8	12	8
Furs, coats etc	10	11	13	23	7	2	14	4
None	8	6	0	6	15	13	3	14
Maternity wear	8	7	13	11	4	6	10	5
Bridal wear	6	0	5	23	5	7	6	6
Ethnic wear (saris)	5	5	2	0	8	10	3	9
Safari clothing	3	2	4	0	6	4	3	5
Total	351	306	388	368	336	360	355	351



Table 10.5
Decor/ Interiors/ Furniture & Appliances
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44461	10376	12006	4387	7671	18938	26742	17759
	%	%	%	%	%	%	%	%
Game	36	31	30	32	32	52	31	43
Lewis Stores	18	7	29	42	20	14	22	11
Other	17	24	23	3	1	15	20	13
Mr Price Home	13	14	5	5	31	14	8	20
Boardmans	10	12	4	6	27	12	7	15
@Home	10	8	6	3	20	12	6	15
Russells	8	0	13	17	8	9	8	6
None	7	4	10	13	6	4	8	5
Sheet Street	6	2	3	3	12	11	2	10
Tafelberg Furnishers	6	6	3	0	6	9	4	10
Hi Fi Corporation	5	2	2	13	3	9	4	8
Joshua Doore	5	5	7	11	2	2	7	1
Cori Craft	4	5	2	3	6	5	3	5
House & Home	4	4	2	0	10	6	2	7
Baeres	3	1	8	0	3	0	4	1
Ackermans Home	2	2	1	3	1	2	2	2
wetherleys	2	4	0	0	5	1	2	2
Dion Wired	1	1	1	0	3	1	1	2
OK Furniture	1	3	1	0	1	0	2	0
Total	158	135	150	154	11	176	144	176



Table 10.6
Other Decor/ Interiors/ Furniture & Appliances
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	10370	12006	4367	7671	16038	26742	17709
	%	%	%	%	%	%	%	%
Appliances	40	42	49	28	32	37	43	35
Linen Shops	31	16	27	32	36	47	24	42
Furniture store	28	21	37	14	34	26	27	30
Curtaining	25	16	30	28	21	29	24	26
Hi Fi TV Video	24	20	28	35	24	16	26	20
Beds	21	12	30	50	11	17	26	14
Carpets	18	11	28	18	15	17	20	16
Lamps & Lighting	17	22	11	23	15	18	17	17
Second hand furniture	17	17	20	32	12	12	21	12
None	15	13	7	13	22	20	11	21
Blinds and drapes	14	13	9	17	18	19	12	16
DIY Furniture	14	13	16	14	9	14	15	12
Garden furniture	10	5	16	3	14	10	10	12
Antiques	6	6	4	0	5	11	4	8
Fitted Kitchens	5	5	0	11	7	7	4	7
Pine furniture	4	4	2	0	7	7	2	7
Total	289	236	314	318	282	307	266	297



Table 10.7
Branded Gifts/ Music/ books etc.
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	16379	12006	4367	7671	10038	26742	17709
	%	%	%	%	%	%	%	%
CNA	26	17	25	32	17	32	23	32
Musica	23	9	24	21	32	32	17	32
CUM Books	19	14	12	11	24	32	13	29
Exclusive Books	18	18	19	9	25	14	17	19
Bargain Books	15	15	30	2	11	7	20	9
PNA	9	13	9	23	3	5	13	4
Look and Listen	8	12	5	0	13	8	7	10
Cardies	8	8	2	12	12	9	7	10
Wordsworth	4	4	1	0	6	6	2	6
Other	3	3	5	0	5	2	4	3
Paper Paradise	2	3	1	0	3	4	2	3
Game	2	3	2	2	0	2	2	1
Crazy Store	2	3	1	2	1	3	2	2
Paperweight	1	1	1	0	2	1	1	2
Music Moods	1	2	0	0	3	2	1	2
Total	141	125	137	114	157	159	131	164



Table 10.8
Other Gifts/ Music/ books etc.
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	10370	12008	4367	7671	10030	26742	17709
	%	%	%	%	%	%	%	%
Gifts	50	43	61	63	43	45	54	44
Books & Stationery	43	38	50	49	28	47	45	39
Music Stores	35	31	46	40	25	30	39	28
None	19	17	14	13	37	16	15	25
Musical Instruments	15	11	17	2	14	21	12	18
Total	162	140	188	167	147	159	165	154

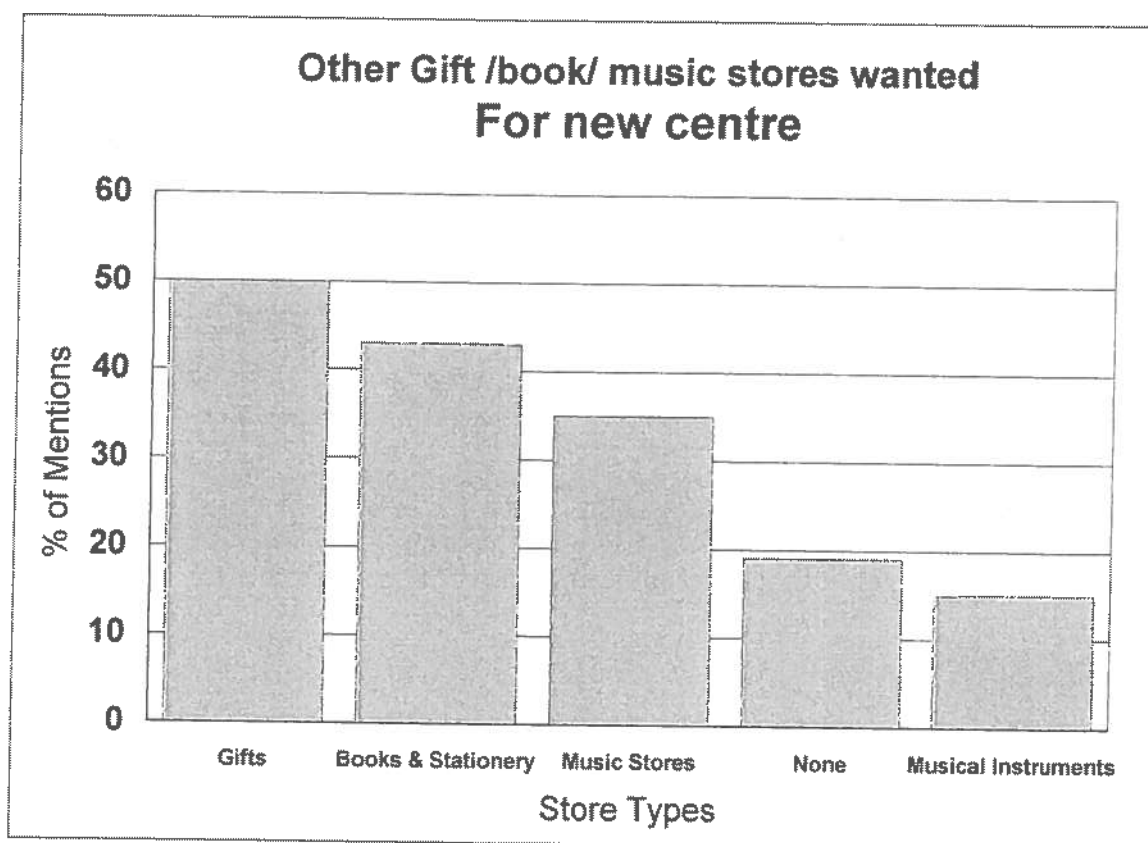


Table 10.9
Branded Restaurants and coffee shops
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	10370	12006	4367	7671	10038	26742	17709
	%	%	%	%	%	%	%	%
Mugg & Bean	28	19	31	16	34	34	24	34
Spur	25	22	18	14	44	31	19	37
Wimpy	21	13	14	11	27	36	13	32
Nando's	10	13	15	16	4	4	14	4
KFC	10	10	8	24	7	8	11	8
Other	10	11	10	3	13	10	9	11
Ocean Basket	10	10	4	2	17	15	6	16
Hungry Lion	9	1	19	36	0	0	14	0
McDonalds	8	6	13	3	6	9	9	8
Cattle Baron	6	6	4	6	2	9	5	6
Cape Town Fish Market	6	8	3	0	6	9	5	9
Steers	5	1	3	0	10	10	2	10
Dros	4	3	1	5	9	2	3	5
Vida E Cafe	4	8	4	5	2	2	5	2
Panarotti's	3	4	3	0	5	1	3	3
Dulce	3	7	4	0	0	1	4	0
Cafe Rossini	3	7	3	0	4	2	4	3
Kauai	2	3	0	0	5	3	1	4
Woolworths Coffee shop	1	1	3	0	0	1	1	0
House of coffees	1	1	0	2	2	3	1	3
Milky Lane	1	0	2	0	2	1	1	1
Simply Asia	1	2	1	0	0	0	1	0
St Elmo's	1	0	2	0	1	1	1	1
Total	173	156	165	143	202	192	156	197



Table 10.10
Other Restaurants and coffee shops
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	10370	12006	4357	7671	10036	26742	17709
	%	%	%	%	%	%	%	%
Family Restaurants	45	40	43	58	45	48	44	47
More Coffee shops	34	33	32	24	42	36	31	38
Pizza Restaurant	29	24	25	22	31	39	24	36
Steakhouse	20	18	22	8	26	21	18	23
None	19	20	25	23	16	11	23	13
Upmarket Restaurants	14	20	15	3	9	14	15	12
Italian Restaurant	9	4	11	3	12	13	7	13
Thai Restaurant	6	7	3	0	14	4	4	8
Vegetarian Restaurant	5	2	0	0	10	12	1	11
Total	181	168	176	141	205	198	167	201



Table 10.11
Branded Consumer Services
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	18179	12095	4367	7671	10038	26742	17708
	%	%	%	%	%	%	%	%
None	70	77	73	70	66	62	74	63
ABSA	14	11	9	5	23	22	9	22
Standard Bank	9	4	10	0	12	14	5	13
First National Bank	7	4	2	0	12	15	2	14
Nedbank	6	3	5	0	13	6	3	9
Capitec Bank	5	2	5	11	8	5	5	6
Ster Kinekor	4	3	2	11	1	5	4	3
Telkom	2	1	1	3	2	4	1	3
Other	5	3	10	0	6	5	5	6
Total	122	108	117	100	143	138	109	139



The high incidence (70%) of responses claiming that "nothing" was wanted at the new centre in this category suggests that respondents are not familiar with the term "Branded Consumer services". The results here are therefore little more than a guideline as to banking services wanted.