

Table 10.12
Other Services
Multi mention

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	16376	12696	4367	7671	10538	26742	17709
	%	%	%	%	%	%	%	%
Cinemas	51	49	46	21	54	65	44	60
ATM's	40	35	29	35	52	53	32	53
Banks	27	27	19	43	32	28	26	30
Hairdressers	24	11	29	20	29	31	20	30
None	19	24	19	26	16	11	22	13
DVD / Video	15	14	17	8	20	14	14	17
Dry Cleaner/ Laundry	13	8	15	3	18	14	11	16
Beautician	9	6	5	0	11	19	5	16
Nail Bars	5	4	0	3	14	6	2	9
Total	203	178	181	159	246	241	176	244

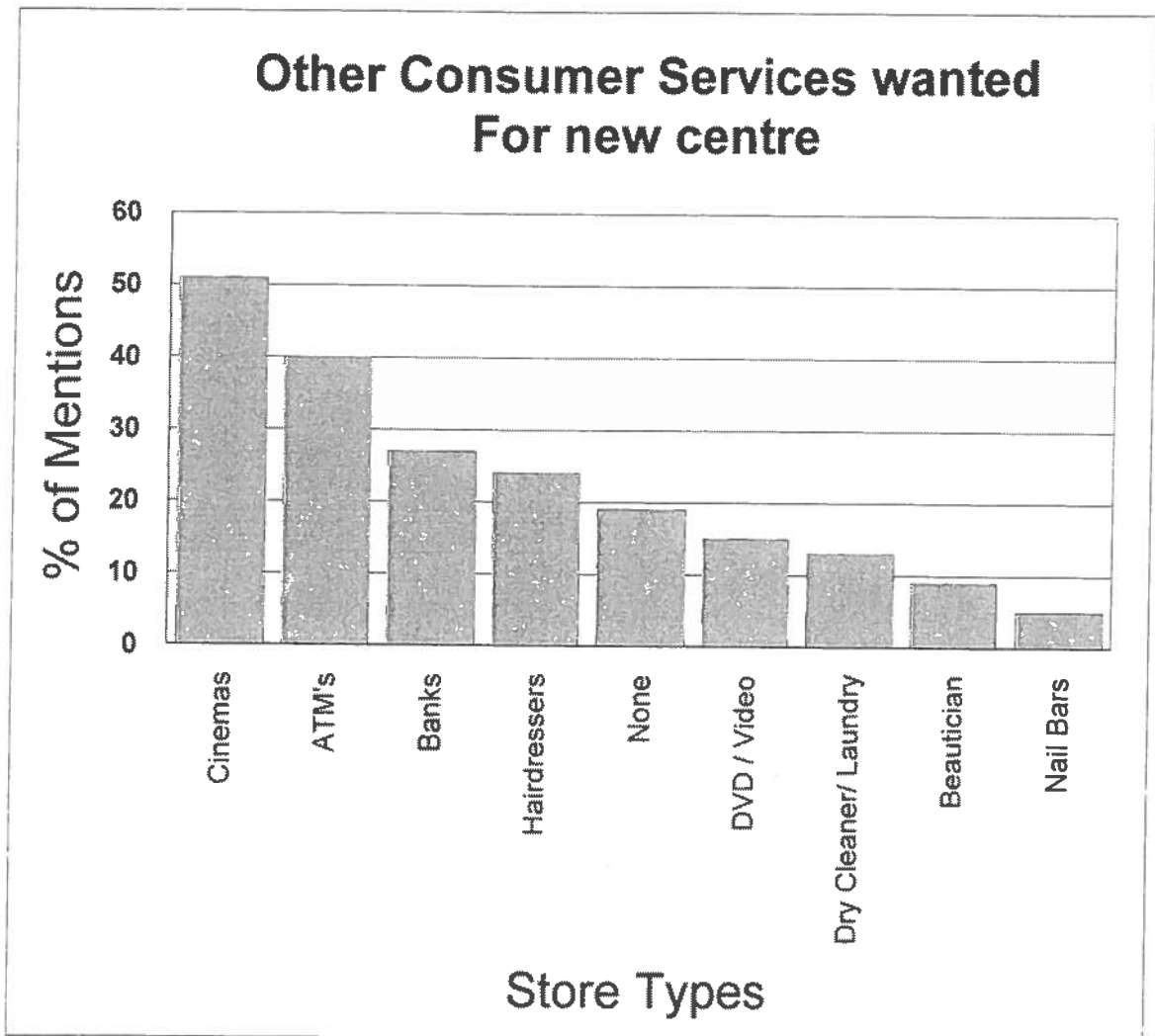


Table 10.13
Branded Miscellaneous Goods
Multi mention

There is a wide variety of "Other" Miscellaneous retail goods, but few were mentioned by respondents. These questions were deliberately not prompted in order to let respondents give their views without bias.

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44451	19370	12006	4367	7571	10038	28742	17709
	%	%	%	%	%	%	%	%
None	36	43	47	52	19	21	46	20
Dischem	44	39	35	41	52	54	37	53
Game	15	14	7	3	26	19	9	23
Vodacom	7	2	11	3	6	8	6	7
Clicks	7	8	2	0	14	10	4	12
Midas	6	0	11	0	8	8	5	8
MTN	6	1	10	5	3	7	6	5
Clicks Pharmacy	4	2	2	0	4	8	2	6
Incredible Connection	3	3	2	0	9	0	2	4
Builders Warehouse	3	4	2	0	3	5	2	4
Diskom	2	0	3	6	2	1	2	1
Sportsmans Warehouse	2	3	1	3	0	1	2	1
Makro	2	2	2	0	2	3	1	3
Cell C	2	1	4	3	2	2	3	2
Mica hardware	2	2	2	3	2	0	2	1
Cape Union Mart	2	3	2	0	4	0	2	2
Toys R Us	2	2	3	0	3	1	2	2
Virgin Active Gym	1	2	1	0	0	1	1	0
Total	146	131	147	119	161	149	134	154



Table 10.14
Other Miscellaneous Goods
Multi mention

A wide range of suggestions was elicited in this question, but due to the nature of the question, the responses are low

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	44461	10370	12006	4367	7671	10038	26742	17700
	%	%	%	%	%	%	%	%
Hardware	33	15	35	50	36	39	30	36
Pharmacy	28	29	30	24	0	29	29	27
Discounter (Game)	27	24	23	34	24	33	25	29
Variety store (Clicks)	25	22	32	9	21	28	25	25
Paint	15	2	15	32	17	17	13	17
Cellphones	14	5	1	21	32	24	6	28
Homeware	14	10	13	0	20	21	10	20
Motor Spares	13	9	14	3	16	18	10	17
Computer Equipment	12	12	10	0	16	14	9	15
Cosmetics & Fragrances	12	9	14	13	8	14	12	11
Florist	12	9	10	6	18	15	9	17
Arts & Crafts materials	11	21	1	0	11	16	9	14
Arts & Crafts - Contemporary	11	15	3	11	12	14	9	13
Other	10	11	11	0	15	10	9	12
Novelty store (Verimark)	10	7	7	3	15	15	7	15
Sports equipment	9	9	6	12	1	9	8	9
Camping & Outdoor gear	8	11	3	3	14	8	6	11
Toy Shop	7	7	8	0	14	10	6	8
Pet shop	7	9	4	3	24	10	6	8
Bottle store / Wine shop	7	4	9	11	5	5	7	5
Health Shops	7	10	4	2	8	11	6	10
Wallpaper & Paint effects	6	7	2	0	10	8	4	9
Nursery	6	8	2	2	102	9	4	10
Mirrors/Framing	6	5	2	0	10	10	3	10
Arts & Crafts - Indigenous	6	5	1	0	7	13	2	11
Jeweller	6	5	2	0	11	13	3	12
Luggage & Leather goods	5	3	5	0	7	6	4	7
Sanitaryware	5	4	6	0	6	5	4	5
Second Hand goods	4	5	5	3	2	5	5	3
Ceramic ware (pottery)	4	2	6	0	2	5	4	4
Sewing Machines (Bernina)	4	7	2	3	9	2	4	4
Swimming Pool Equipment	4	2	1	0	9	7	2	8
Glass & Crockery	3	2	3	0	8	4	2	6
Trailers	3	0	9	0	4	1	4	20
Pawnbroker	3	1	2	13	6	1	3	1
Motor Cycles /Scooters	3	2	1	0	5	3	2	4
Play area for children	3	0	5	0	0	5	2	3
Games Arcade	3	3	1	13	1	2	4	2
Cameras & Scopes	3	0	1	0	7	4	1	5
Pharmacy	2	0	4	0	1	3	2	2
Arms & Ammunition	2	1	2	0	0	3	1	2
Entertainment centre / Live shows	2	7	2	2	1	1	3	1
Tobacconist	1	0	0	0	6	1	0	1
Jewellery store	1	1	0	0	3	2	0	3
Security Shop	1	0	2	0	6	1	1	2
Ten Pin Bowling	1	3	0	0	0	1	1	0
Bicycles	1	1	1	6	1	0	2	1
None	25	26	22	29	26	25	25	26
Total	405	350	342	308	577	500	343	511

Table 11.1
Future likely Distribution of Expenditure after Mall development

Details	Total	Total	Primary Area			Secondary Area		Primary	Secondary
			AB	CD	EF	AB	CD	%	%
Food and Groceries	Hermanus	75	90	84	92	53	59	88	56
	Other Local	18	5	11	6	32	34	8	33
	Over the Mountain	7	5	5	2	15	7	4	11
	Total	100	100	100	100	100	100	100	100
Clothing & Footwear	Hermanus	75	86	85	89	53	64	86	59
	Other Local	15	4	10	9	23	27	8	25
	Over the Mountain	10	10	5	2	24	9	6	16
	Total	100	100	100	100	100	100	100	100
Furniture	Hermanus	78	83	89	95	55	65	88	61
	Other Local	14	6	7	4	26	26	6	26
	Over the Mountain	8	11	4	1	19	8	6	13
	Total	100	100	100	100	100	100	100	100
Household Goods	Hermanus	76	87	90	89	51	61	89	57
	Other Local	16	4	7	9	29	31	6	30
	Over the Mountain	8	9	3	2	20	8	5	13
	Total	100	100	100	100	100	100	100	100
Electrical Appliances	Hermanus	75	84	93	81	51	60	87	56
	Other Local	16	7	4	10	31	28	7	30
	Over the Mountain	9	9	3	9	16	11	6	14
	Total	100	100	100	100	100	99	100	100
Electronic Goods	Hermanus	73	79	92	80	51	60	85	56
	Other Local	15	7	4	5	24	31	5	28
	Over the Mountain	13	14	4	15	24	9	10	16
	Total	100	100	100	100	100	100	100	100
Sporting Goods and Equipment	Hermanus	76	82	90	84	57	64	85	61
	Other Local	14	9	6	6	20	28	7	24
	Over the Mountain	10	10	5	10	24	8	7	15
	Total	100	100	100	100	100	100	100	100
Toys, Hobbies and games	Hermanus	79	86	90	91	57	65	89	62
	Other Local	12	3	5	5	19	28	4	24
	Over the Mountain	9	10	4	4	24	7	7	14
	Total	100	100	100	100	100	100	100	100
Jewellery, Watches etc.	Hermanus	76	85	88	94	53	64	88	59
	Other Local	14	4	8	5	23	29	6	27
	Over the Mountain	10	11	4	1	23	7	7	14
	Total	100	100	100	100	100	100	100	100
Camping & Outdoor equipment	Hermanus	77	86	88	92	53	68	88	61
	Other Local	12	3	8	6	19	28	5	23
	Over the Mountain	11	12	5	2	27	6	7	16
	Total	100	100	100	100	100	100	100	100
Books & Stationery	Hermanus	79	91	92	98	53	60	93	58
	Other Local	14	4	5	1	25	34	4	29
	Over the Mountain	7	5	3	1	22	6	3	13
	Total	100	100	100	100	100	100	100	100
Wine & Spirits	Hermanus	76	88	89	97	50	56	91	53
	Other Local	18	7	7	1	36	37	6	36
	Over the Mountain	6	4	3	1	14	8	3	11
	Total	100	100	100	100	100	100	100	100
Personal Care Products	Hermanus	74	84	89	88	51	60	87	56
	Other Local	20	11	10	9	32	35	10	34
	Over the Mountain	6	5	1	3	17	5	3	10
	Total	100	100	100	100	100	100	100	100
Restaurants	Hermanus	77	89	88	95	54	61	90	58
	Other Local	15	6	8	1	27	31	6	29
	Over the Mountain	7	5	3	4	19	8	4	13
	Total	100	100	100	100	100	100	100	100
Cinemas and Live shows	Hermanus	78	86	85	86	61	70	85	67
	Other Local	9	3	9	1	13	17	6	14
	Over the Mountain	13	11	6	13	26	13	9	19
	Total	100	100	100	100	100	100	100	100

Table 11.2
A Comparison Of Existing and Likely Future Expenditure Distribution

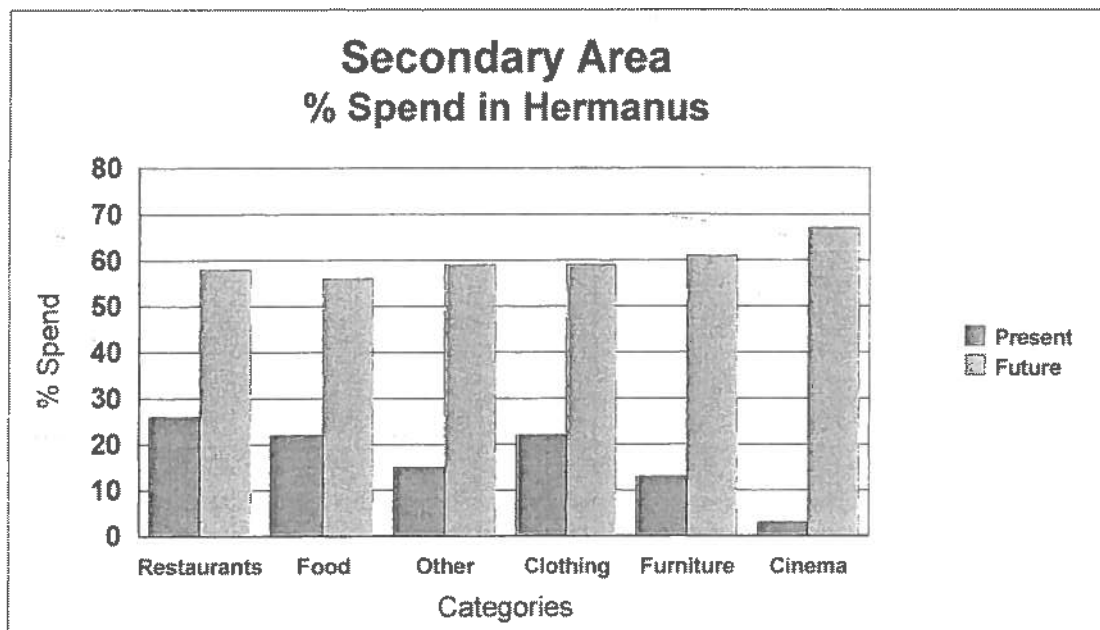
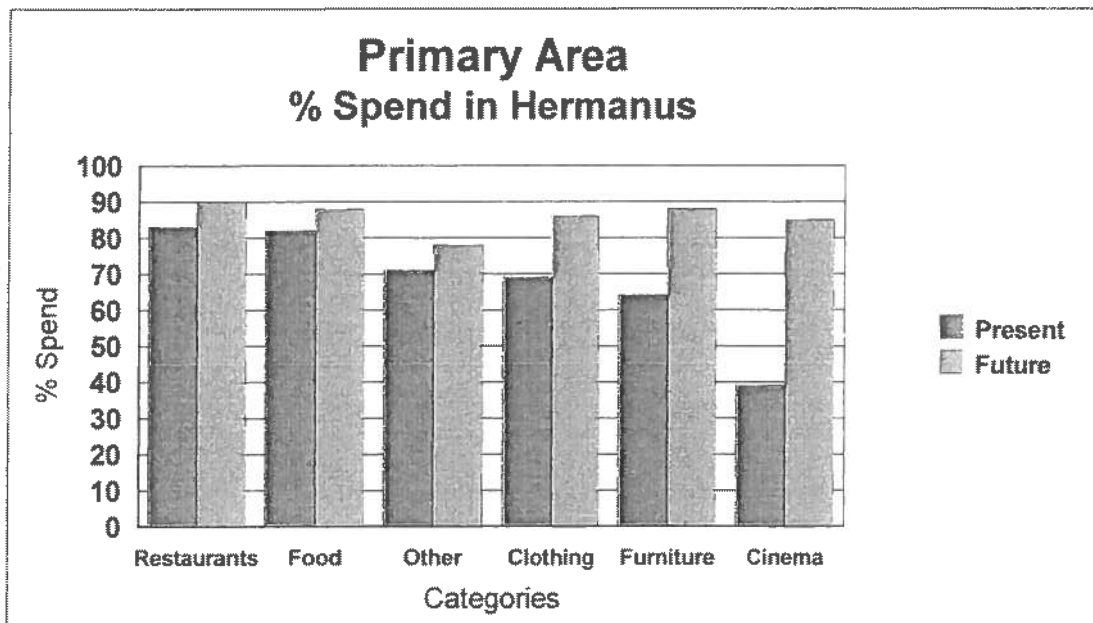
Details		Total		Primary		Secondary	
		Existing	Future	Existing	Future	Existing	Future
Food and Groceries		%	%	%	%	%	%
	Hermanus	59	75	82	88	22	56
	Other Local	29	18	9	8	60	33
	Over the Mountain	12	7	9	4	18	11
	Total	100	100	100	100	100	100
Clothing & Footwear	Hermanus	50	75	89	86	22	59
	Other Local	15	15	5	8	30	25
	Over the Mountain	35	10	26	6	48	16
	Total	100	100	100	100	100	100
Furniture	Hermanus	45	78	64	88	13	61
	Other Local	21	14	6	6	47	26
	Over the Mountain	34	8	30	6	40	13
	Total	100	100	100	100	100	100
Household Goods	Hermanus	56	76	78	89	23	57
	Other Local	21	16	7	6	42	30
	Over the Mountain	23	8	15	5	35	13
	Total	100	100	100	100	100	100
Electrical Appliances	Hermanus	51	75	74	87	15	56
	Other Local	22	16	5	7	50	30
	Over the Mountain	27	9	22	6	35	14
	Total	100	100	101	100	100	100
Electronic Goods	Hermanus	38	73	59	85	8	56
	Other Local	15	15	4	5	33	28
	Over the Mountain	47	13	37	10	59	16
	Total	100	100	100	100	100	100
Sporting Goods and Equipment	Hermanus	47	76	67	85	14	61
	Other Local	17	14	8	7	32	24
	Over the Mountain	36	10	25	7	54	15
	Total	100	100	100	100	100	100
Toys, Hobbies and games	Hermanus	49	79	71	89	15	62
	Other Local	18	12	8	4	36	24
	Over the Mountain	33	9	21	7	49	14
	Total	100	100	100	100	100	100
Jewellery, Watches etc.	Hermanus	45	76	87	86	16	59
	Other Local	22	14	8	5	41	27
	Over the Mountain	33	10	25	7	43	14
	Total	100	100	100	100	100	100
Camping & Outdoor equipment	Hermanus	36	77	55	88	5	61
	Other Local	16	12	9	5	27	23
	Over the Mountain	48	11	36	7	68	16
	Total	100	100	100	100	100	100
Books & Stationery	Hermanus	59	79	85	93	18	58
	Other Local	26	14	6	4	56	29
	Over the Mountain	15	7	9	3	26	13
	Total	100	100	100	100	100	100
Wine & Spirits	Hermanus	56	76	80	91	16	53
	Other Local	36	18	14	6	71	36
	Over the Mountain	8	6	6	3	13	11
	Total	100	100	100	100	100	100
Personal Care Products	Hermanus	58	74	83	87	18	56
	Other Local	30	20	10	10	62	34
	Over the Mountain	12	6	7	3	20	10
	Total	100	100	100	100	100	100
Restaurants	Hermanus	60	77	83	90	26	58
	Other Local	25	15	8	6	50	29
	Over the Mountain	15	7	9	4	24	13
	Total	100	100	100	100	100	100
Cinemas and Live shows	Hermanus	26	78	39	85	3	67
	Other Local	7	9	7	6	7	14
	Over the Mountain	67	13	54	9	90	19
	Total	100	100	100	100	100	100

Table 11.3
Percentage Change in Expenditure Distribution

Details	Total	Primary	Secondary	
Food and Groceries	Hermanus	27%	7%	155%
	Other Local	-38%	-11%	-45%
	Over the Mountain	-42%	-56%	-39%
	Total			
Clothing & Footwear	Hermanus	50%	25%	168%
	Other Local	0%	60%	-17%
	Over the Mountain	-71%	-77%	-67%
	Total			
Furniture	Hermanus	73%	37%	370%
	Other Local	-35%	4%	-44%
	Over the Mountain	-75%	-79%	-68%
	Total			
Household Goods	Hermanus	35%	14%	148%
	Other Local	-23%	-13%	-30%
	Over the Mountain	-65%	-66%	-62%
	Total			
Electrical Appliances	Hermanus	47%	18%	273%
	Other Local	-27%	40%	-40%
	Over the Mountain	-67%	-73%	-60%
	Total			
Electronic Goods	Hermanus	91%	44%	603%
	Other Local	-2%	33%	-15%
	Over the Mountain	-73%	-74%	-74%
	Total			
Sporting Goods and Equipment	Hermanus	62%	27%	338%
	Other Local	-18%	-9%	-25%
	Over the Mountain	-72%	-71%	-73%
	Total			
Toys, Hobbies and games	Hermanus	61%	25%	313%
	Other Local	-35%	-44%	-34%
	Over the Mountain	-72%	-68%	-71%
	Total			
Jewellery, Watches etc.	Hermanus	69%	31%	270%
	Other Local	-36%	-31%	-34%
	Over the Mountain	-70%	-73%	-67%
	Total			
Camping & Outdoor equipment	Hermanus	115%	60%	1129%
	Other Local	-25%	-42%	-15%
	Over the Mountain	-78%	-82%	-77%
	Total			
Books & Stationery	Hermanus	34%	9%	220%
	Other Local	-46%	-33%	-48%
	Over the Mountain	-53%	-67%	-49%
	Total			
Wine & Spirits	Hermanus	36%	14%	231%
	Other Local	-49%	-60%	-49%
	Over the Mountain	-29%	-44%	-19%
	Total			
Personal Care Products	Hermanus	28%	5%	212%
	Other Local	-33%	0%	-46%
	Over the Mountain	-50%	-57%	-49%
	Total			
Restaurants	Hermanus	29%	8%	123%
	Other Local	-38%	-23%	-42%
	Over the Mountain	-52%	-54%	-46%
	Total			
Cinemas and Live shows	Hermanus	198%	119%	2122%
	Other Local	28%	-20%	106%
	Over the Mountain	-80%	-83%	-76%
	Total			

Table 11.4
Summary of Existing and Future Likely Expenditure Distribution

	Primary		Secondary		Percentage Change	
	Existing	Future	Existing	Future	Primary	Secondary
	%	%	%	%	%	%
Restaurants	83	90	26	58	8%	123%
Food	82	88	22	56	7%	155%
Other	71	78	15	59	10%	293%
Clothing	69	86	22	59	25%	168%
Furniture	64	88	13	61	38%	369%
Cinema	39	85	3	67	118%	2133%



Retail Census

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RETAIL CENSUS

Total Study Area

Precinct Analysis : Table (1)

By Precinct within the Hermanus

All Retail Categories Based on store type	Precinct Code	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store	% of Category
Hermanus Central	A	61 184	996	16 300	394	2.53	63.6%
Hermanus Gateway	B	7 182	190	26 500	47	4.05	12.2%
Hermanus Industrial	C	12 173	172	14 100	96	1.79	11.0%
Sandbaai Industrial	D	2 085	21	9 900	26	0.79	1.3%
Hemel en Aarde Village	E	5 454	59	10 800	23	2.56	3.8%
Sandbaai	F	5 676	55	9 700	30	1.84	3.5%
Onrus	G	4 698	73	15 500	46	1.58	4.7%
Total all Precincts		98 452	1 565	15 900	662	2.36	100.0%

Precinct Analysis : Table (2)

By Town within the study Area

All Retail Categories Based on store type	Block Code	GROSS SQM	SALES Rmill	Trading Density	No. of Stores*	Sales/ Store	% of Category
Hermanus	A	98 452	1 507	15 300	639	2.36	50.1%
Stanford	St	7 889	76	9 600	61	1.24	2.5%
Gansbaai	G	18 825	258	13 700	196	1.31	8.6%
Kleinmond	KL	28 737	393	13 700	143	2.75	13.1%
Betty's Bay	Be	7 197	76	10 500	40	1.89	2.5%
Caledon	C	17 148	264	15 400	138	1.91	8.8%
Napier	N	2 824	40	14 200	48	0.84	1.3%
Bredasdorp	Bre	27 638	392	14 200	227	1.73	13.0%
Total all Towns		208 710	3 005	14 400	1 492	2.01	191.9%

RETAIL CENSUS**Table 3**

Total Study Area

Structure of the Market by LifePlane

Merchandise Groups	Total	AB	CD	EF
Food and Groceries	1447	290	725	433
Clothing, Footwear and Accessories	334	66	173	95
Furniture and Appliances	114	30	63	21
All Other Retail Goods	631	183	362	86
Consumer Services	573	191	334	49
TOTAL Rmillion	3099	760	1657	683

Merchandise Groups	Total	AB	CD	EF
Food and Groceries	100%	20%	50%	30%
Clothing, Footwear and Accessories	100%	20%	52%	28%
Furniture and Appliances	100%	27%	55%	18%
All Other Retail Goods	100%	29%	57%	14%
Consumer Services	100%	33%	58%	8%
TOTAL	100%	25%	53%	22%

Merchandise Groups	Total	AB	CD	EF
Food and Groceries	47%	38%	44%	63%
Clothing, Footwear and Accessories	11%	9%	10%	14%
Furniture and Appliances	4%	4%	4%	3%
All Other Retail Goods	20%	24%	22%	13%
Consumer Services	18%	25%	20%	7%
TOTAL	100%	100%	100%	100%