

OVERSTRAND MUNICIPALITY PRIMARY CATCHMENT AREA

DOUGLAS PARKER
ASSOCIATES
Lightstone

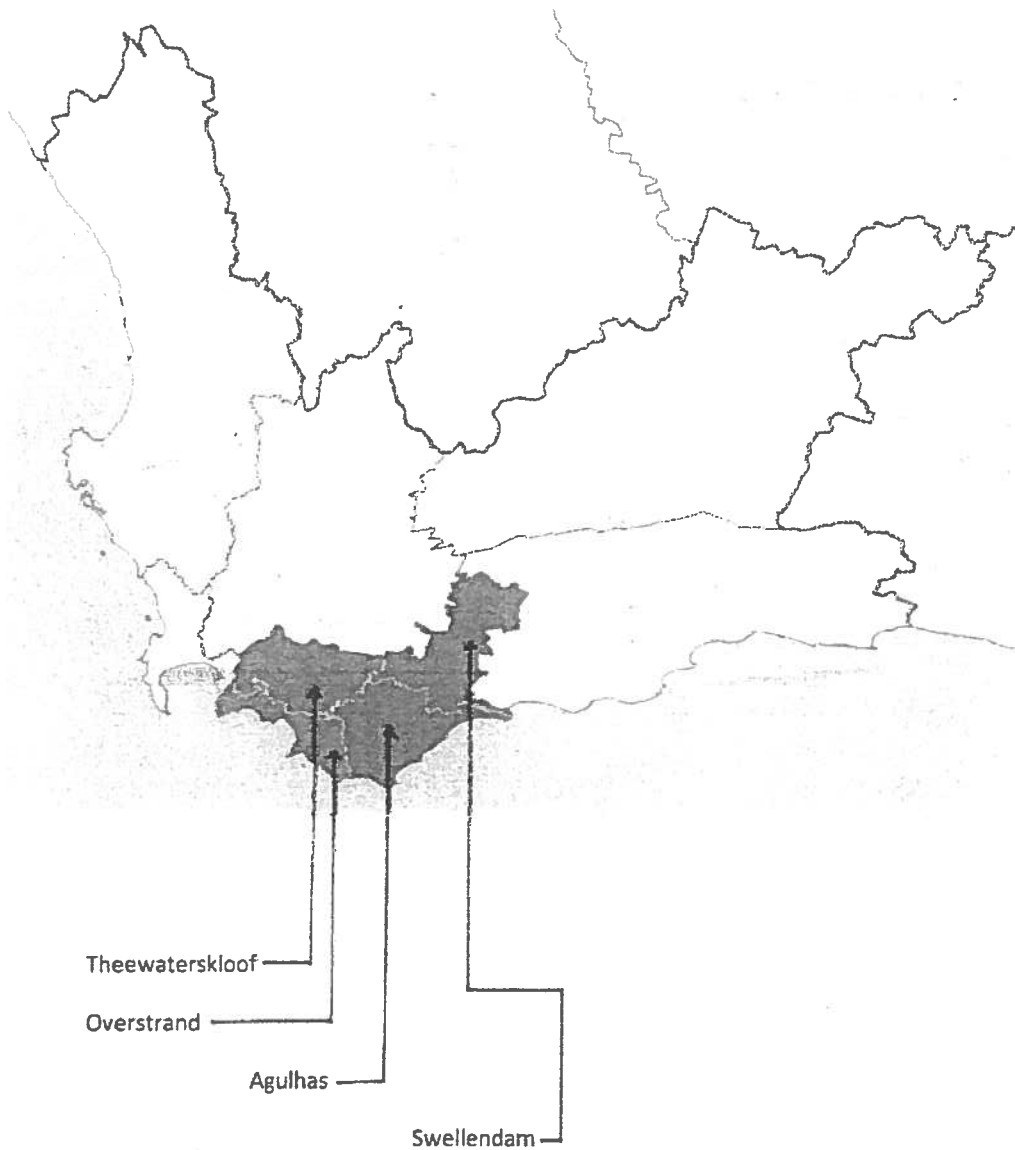


DOUGLAS PARKER
ASSOCIATES

Lightstone



OVERSTRAND DISTRICT MUNICIPALITY



Household Survey

	Page
1 The Questionnaire	1
2 Profile of Survey Respondents	5
3 Distribution Of Expenditure by Location	8
4 Percent of Expenditure spent "over the Mountair	9
5 Specific Products and services bought over the mountain	9
6 Food and Grocery Stores used in the past month (June 2011)	10
7 Share of spend at Clothing and Footwear Retailers in last 3 months	12
8 Share of Spend at Furniture and Appliance stores in the past year	13
9 Attitudes to proposed Toll Plaza's	14
10 Attitude to proposed "one - stop" shopping centre in Hermanus	15
11 Expected reduction in expenditure "Over the Mountain"	16
12 Stores wanted at proposed new Mall	17
13 Future Likely Distribution of Expenditure after Mall Development	31
14 A comparison of Existing and Likely Future Expenditure Distribution	32
15 Percentage Change in Expenditure distribution	33
16 Summary of Existing and Likely Future Expenditure Distribution	34

Douglas Parker Associates Tel: (021) 700-6200	Hermanus Local Shopper Survey July 2011	Job No: 11222/DP 19 July 2011
Name:	Interview completed on: Time taken on interview: Min.	INTERVIEWER: I hereby certify that this interview has been carried out by me according to the instructions given to me and has been checked by me. NAME: SIGNED: CHECKED BY SUPERVISOR: CHECKED BY FIELD MANAGER: NAME: SIGNED: SAMPLE POINT NO: CHECKBACK: Yes -1 No -2
Address:		
Nearest Street Corner:		
Suburb:		
Tel: (H) (W)		

Goodday, my name is I'm from Douglas Parker Associates. We are conducting a shopping survey and would like to ask you a few questions.

SCREENING QUESTIONS:

A. Who does most of the shopping in your household?

Self	-1	Continue	Other	-2	Ask to speak to person responsible
------	----	----------	-------	----	------------------------------------

B. Do you or any member of your household, family or close friends work for a:

Market Research, Marketing, Advertising company or a Shopping Centre	-1	IF YES CLOSE INTERVIEW
--	----	------------------------

C. Are you a **permanent resident** of Overstrand?

Yes	-1	Continue	No	-2	Close interview
-----	----	----------	----	----	-----------------

D. Into which group does your age fall?

Less than 21 years	-1	Close	21 – 64 years	-2	Continue	65+ years	-3	Check quota
--------------------	----	-------	---------------	----	----------	-----------	----	-------------

E. What is your highest level of education?

Level of Education	Self	Head of House	
Less than grade 8/9	-1	-1	Close unless respondents reside in Zwelihle, Mount Pleasant, Hawston
Grade 10 to Grade 12	-2	-2	Continue
Diploma and/or Degree	-3	-3	Continue

1. Thinking of the places where the members of your household do their shopping, could you please give me some idea for each of the categories I will read you, how much is spent in Hermanus, how much is spent elsewhere in the Overstrand/Overberg area and how much is spent over the mountain in Somerset West or Cape Town? (All = 100% -1, Most = 75% -2, Half = 50% -3, Some = 25% -4, Little = 10% -5 and None = 0% -6)

Category	Hermanus	Other Local	Over Mountain
Food and groceries			
Clothing and footwear			
Furniture			
Household goods			
Electrical appliances - toasters, kettles etc.			
Electronic goods - computers, cameras, etc.			
Sporting goods and equipment			
Toys, hobbies, games			
Jewellery, watches, etc.			
Camping and outdoor equipment			
Books and stationery			
Wine and spirits			
Personal care products			
Restaurants			
Cinemas and live shows			

2. Thinking of your households shopping, what specific products and services do you often or sometimes buy over the mountain in Somerset West or Cape Town?

- 3a. **Food and Groceries:** Could you please tell me the names of all the food and grocery stores your household used in the past month (June)?
- 3b. **For each store mentioned in Q3a:** Where is that? In which suburb/area is it? **Record Below**
- 3c. **For each mentioned in Q3a:** How much did you spend there? **Record Below**

Q3a: Supermarket		Q3b: Place suburb/area	Q3c: Rands
	-1		
	-2		
	-3		
	-4		
	-5		

- 4a. **Clothing and Footwear:** Could you please tell me the names of all the clothing and footwear stores your household used in the past three months (April, May, June)?
- 4b. **For each store mentioned in Q4a:** Where is that? In which suburb/area is it? **Record Below**
- 4c. **For each mentioned in Q4a:** How much did you spend there? **Record Below**

Q4a: Supermarket		Q4b: Place suburb/area	Q4c: Rands
	-1		
	-2		
	-3		
	-4		
	-5		

- 5a. **Furniture, Appliances and Housewares:** Could you please tell me the names of all the furniture, appliances and housewares stores your household used in the past six months (January to June)?
- 5b. **For each store mentioned in Q5a:** Where is that? In which suburb/area is it? **Record Below**
- 5c. **For each mentioned in Q5a:** How much did you spend there? **Record Below**

Q5a: Supermarket		Q5b: Place suburb/area	Q5c: Rands
	-1		
	-2		
	-3		
	-4		
	-5		

- 6a. The government has plans to erect 3 toll plaza's between Bot River and Somerset West. This could add between R50 and R100 for a two way trip over the mountain by car. Do you think this will reduce the frequency of your travel there?

Yes	-1	No	-2	Don't know	-3
-----	----	----	----	------------	----

- 6b. Do you think the toll plaza's will reduce the amount that your household spends over the mountain?

Yes	-1	No	-2	Don't know	-3
-----	----	----	----	------------	----

- 7a. 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 clothing and other chains, how would you feel about that? Do you think this would be a good idea?

A very good idea	-1	Ask Q7b
A good idea	-2	

Not such a good idea	-3	Ask Q7c
A bad idea	-4	

- 7b. And why do you say that?

Hermanus needs a proper one stop shopping centre	-1
There is a need for the additional shops	-2
Other (specify)	

- 7c. And why do you say that?

There is no need for additional shops	-1
A big centre will damage the existing town centre	-2
Other (specify)	

8. If such a shopping centre were to be built, to what extent do you think it would reduce your experience over the mountain?

All (90-100%)	-1	Some (20-40%)	-4
Most (60-90%)	-2	A little (Up to 20%)	-5
About half (40-60%)	-3	Not at all (0%)	-6

9. Bearing in mind what shops there are in Hermanus and the Overstrand, what **specific branded stores, shops and services** would you like to have at the proposed new centre? (**Once spontaneous mention for branded stores has been given – See show card for shops and services and PROBE**)

Food and groceries:

Clothing and footwear:

Décor/Interiors/Furniture:

Gifts/Music/Books, etc.:

Restaurants/Coffee Shops:

Services i.e. banks, chemist

Other retail goods:

Miscellaneous:

10. If such a shopping centre was built, containing all the shops and services that we have discussed, what proportion of your household expenditure on the following categories do you think would go to the new centre, how much would remain with the stores you presently use in Hermanus or your local area, and how much would go over the mountain? (All = 100% -1, Most = 75% -2, Half = 50% -3, Some = 25% -4, Little = 10% -5 and None = 0% -6)

Category	Hermanus	Other Local	Over Mountain
Food and groceries			
Clothing and footwear			
Furniture			
Household goods			
Electrical appliances - toasters, kettles etc.			
Electronic goods - computers, cameras, etc.			
Sporting goods and equipment			
Toys, hobbies, games			
Jewellery, watches, etc.			
Camping and outdoor equipment			
Books and stationery			
Wine and spirits			
Personal care products			
Restaurants			
Cinemas and live shows			

DEMOGRAPHICS:**WHO IS THE HEAD OF YOUR H/HOLD:**

Self	-1
Other	-2

MARITAL STATUS:

Married/Live with partner	-1
Previously married	-2
Single	-3

HOME LANGUAGE:

English	-1
Afrikaans	-2
Other	-3
.....	

GENDER: (Observe)

Male	-1
Female	-2

AGE: (Show Card)

Self	Head of H/hold
.....	

WORK STATUS:

	Self	H/hold
Works full-time	-1	-1
Works part-time	-2	-2
Self employed	-3	-3
Does not work (choose not to)	-4	-4
Unemployed (looking for work)	-5	-5
Student	-6	-6
Pensioner/Retired	-7	-7

OCCUPATION: Household Head

Self:.....

H/H:

FOR OFFICE USE ONLY:	Self	H/H
Professional	-1	-1
Management	-2	-2
Clerical/sales	-3	-3
Tradesman/skilled	-4	-4
Semi-skilled	-5	-5
Unskilled	-6	-6
Other	-7	-7

In which suburb/town do you work?

--

EDUCATION LEVEL:

	Self	H/H
Less than Grade 8	-1	-1
Grade 8/9	-2	-2
Grade 10/11/11+Dip	-3	-3
Grade 12	-4	-4
Grade 12+Diploma	-5	-5
University Degree	-6	-6

Motor Vehicles: How many cars does your household have the use of:

None	-1
One	-2
Two	-3
Three	-4
More than 3	-5

HOUSEHOLD SIZE: Could you please tell me the number of adults in your household that are 19+, and number of children that are 0-9 and 10-19:

Adults above 19	
Children 0-9	
Children 10-19	
Total H/hold Size	

POPULATION GROUP: (Observe)

Black	-1
Coloured/Asian	-2
White	-3

NUMBER OF EARNERS:

Now can you please tell me the no. of people in your h/hold that are earning money and are contributing to the total h/hold income:

--

HOUSEHOLD INCOME: Market Research Companies have found in the past that they can work out how much retail store space, and other services needs to be provided in an area if they know the total monthly household income. Can you please tell me what the total monthly h/hold income that is earned by you and all other working family members living in your household?

Show Card:

Email Address: _____

Thank respondent and close interview

Table 1.2

'Profile of Survey Respondents as weighted by Life Plane and Area.

Demographic Profile Weighted	Total %	Primary Area			Secondary Area		Primary %	Secondary %
		AB	CD	EF	AB	CD		
		%	%	%	%	%		
Occupation: Respondent								
Professional	29	48	9	0	50	27	23	39
Management	16	20	11	3	22	18	13	20
Clerical / Sales	18	8	27	6	13	30	16	20
Tradesman/ skilled	16	7	31	3	10	17	17	14
Semi Skilled	11	17	18	6	3	2	16	3
Unskilled	10	0	4	82	2	6	15	4
Total	100	100	100	100	100	100	100	100
Occupation: Head of Household								
Professional	25	40	11	0	44	22	20	32
Management	19	24	11	3	24	29	15	27
Clerical / Sales	13	7	27	5	10	4	16	7
Tradesman/ skilled	23	10	33	13	17	34	22	26
Semi Skilled	12	19	16	8	3	8	16	6
Unskilled	8	0	2	71	2	3	11	2
Total	100	100	100	100	100	100	100	100
Education: Respondent								
Less than Grade 8	8						13	0
Grade 8 / 9	2						3	0
Grade 10 / 11 + Diploma	17						20	14
Matric (Grade 12)	32						25	43
Matric + Diploma	25						25	25
University Degree	16						14	19
Total	100						100	101
Education: Household Head								
Less than Grade 8	7						12	0
Grade 8 / 9	4						6	0
Grade 10 / 11 + Diploma	15						16	13
Matric (Grade 12)	30						26	36
Matric + Diploma	27						23	32
University Degree	17						17	19
Total	100						100	100
Motor Cars Available to Household								
Average no of vehicles	2.3	2.7	1.9	1.3	2.7	2.6	2.1	2.7
Household Size								
Average household size	2.9	2.8	2.9	3.3	2.6	3.1	3.0	2.9
Population Group								
Black	22	15	45	57	1	1	36	1
Coloured / Asian	24	13	16	43	17	40	19	30
White	55	72	39	0	82	59	45	69
Total	101	100	100	100	100	100	100	100
Number of Earners								
Average	1.8	1.9	1.7	1.6	1.8	1.9	1.7	1.9
Average Household Monthly Income								
Average Household Monthly Income	15 430	21 550	10 630	3 640	23 680	14 020	13 570	18 210

Table:1.3

'Profile of Survey Respondents as weighted by Life Plane and Area.

Demographic Profile Weighted	Total %	Primary Area			Secondary Area		Primary %	Secondary %
		AB	CD	EF	AB	CD		
		%	%	%	%	%		
Area of Residence								
Zwelihle	22.28						37.03	0.00
Sandbaai	7.02						11.67	0.00
Hawston	5.82						9.68	0.00
Onrus	4.80						7.98	0.00
Westcliff	3.27						5.43	0.00
Mount Pleasant	3.27						5.43	0.00
Fisherhaven	2.91						4.84	0.00
Vermont	2.40						3.99	0.00
Eastcliff	2.27						3.78	0.00
Voelklip	1.89						3.15	0.00
Northcliff	1.89						3.15	0.00
Hemel en Aarde estate	0.82						1.36	0.00
Hermanus Heights	0.76						1.26	0.00
Kwaaiwater	0.38						0.63	0.00
Fernkloof	0.38						0.63	0.00
De Kelders	7.27						0.00	18.26
Caledon	7.04						0.00	17.67
Bredasdorp	5.49						0.00	13.77
Stanford	3.58						0.00	8.98
Kleinmond	3.29						0.00	8.26
Gansbaai	3.02						0.00	7.58
Betty's Bay	2.94						0.00	7.39
Napier	2.84						0.00	7.12
Arniston	1.37						0.00	3.44
Struisbaai	1.18						0.00	2.97
LAgulhas	1.18						0.00	2.97
Palmiet	0.63						0.00	1.57
Total	100.0						100.0	100.0

The graph below shows the profile of the study area to be strongly skewed to the older group. This is borne out by the 2001 census and The Community Surveys conducted by Statistics SA.

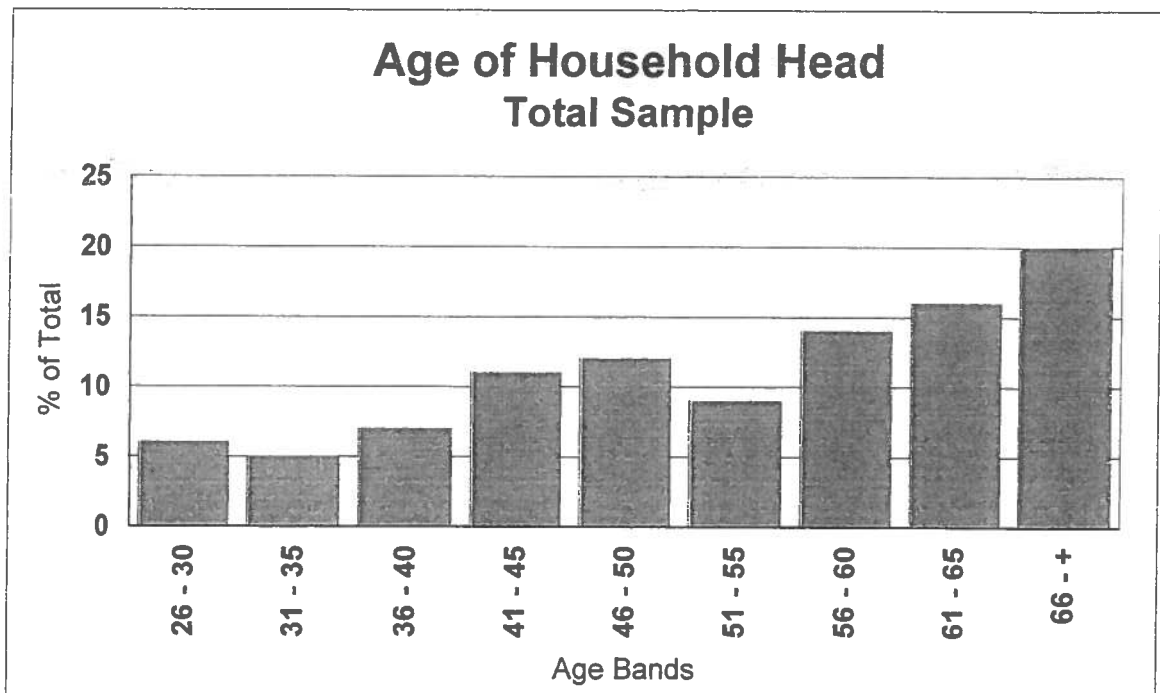


Table 2.1
Distribution of Expenditure by Location

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	5	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	30	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	39	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%	0.8%	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	12 006	4 367	7 671	10 038	26 742	17 709
		%	%	%	%	%	%	%	%
Pick n Pay	24 864	56.0	81.0	73.0	74.0	34.0	18.0	76.0	25.0
Checkers	17 307	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	4 500	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	4 107	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

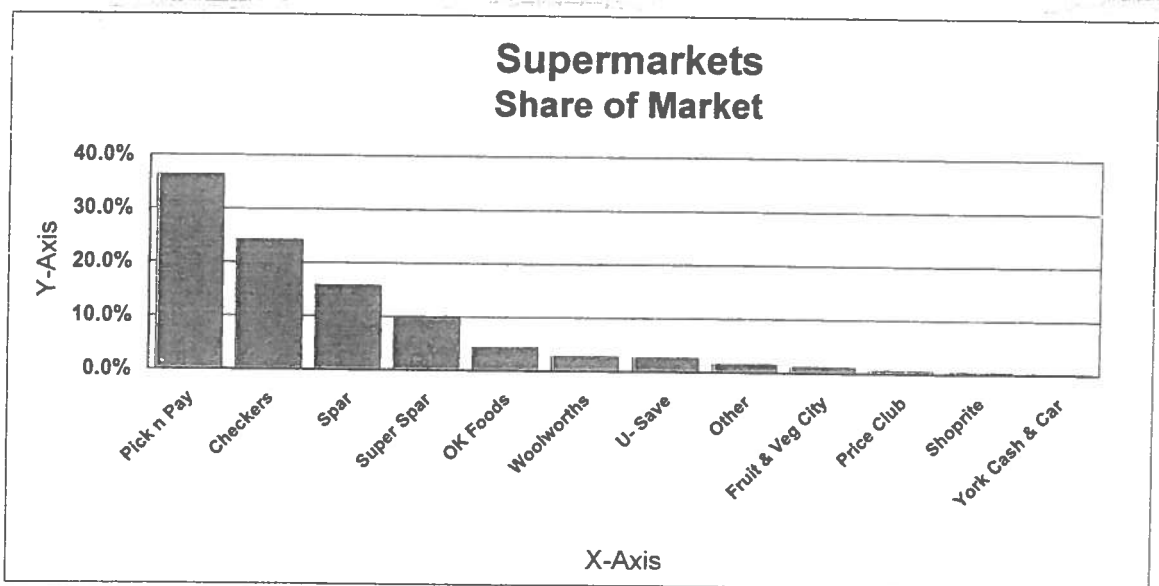
The table above shows the percentage of shoppers using each store. Of the base number of 10 370 AB Life Plane shoppers, 81% shopped at Pick n Pay and 44% shopped at Checkers in the past month.

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%	18.0%	18.1%	15.1%	1.1%	5.2%	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	4 449
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	66	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	589	15 411	970
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	18	0	22
Eastcliff	370	3	100	100	64	0	0	84	0
Gansbaai	3 883	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	3158	3 158	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	816	192	0	782	650	646	808
Fruit & Veg City	2388	2 388	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		424	1 006	0	0	1 025	573	491	629
OK 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	960	1 025	985
Shoprite	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	568	2 548	990	0	0	0	4 107	0
Hermanus(Zweiljie)	4107	100	100	100	0	0	0	100	0
Amount Spent		307	305	0	0	0	0	307	0
Other	1673	1 673	149	675	73	468	309	896	777
Brackenfell	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.

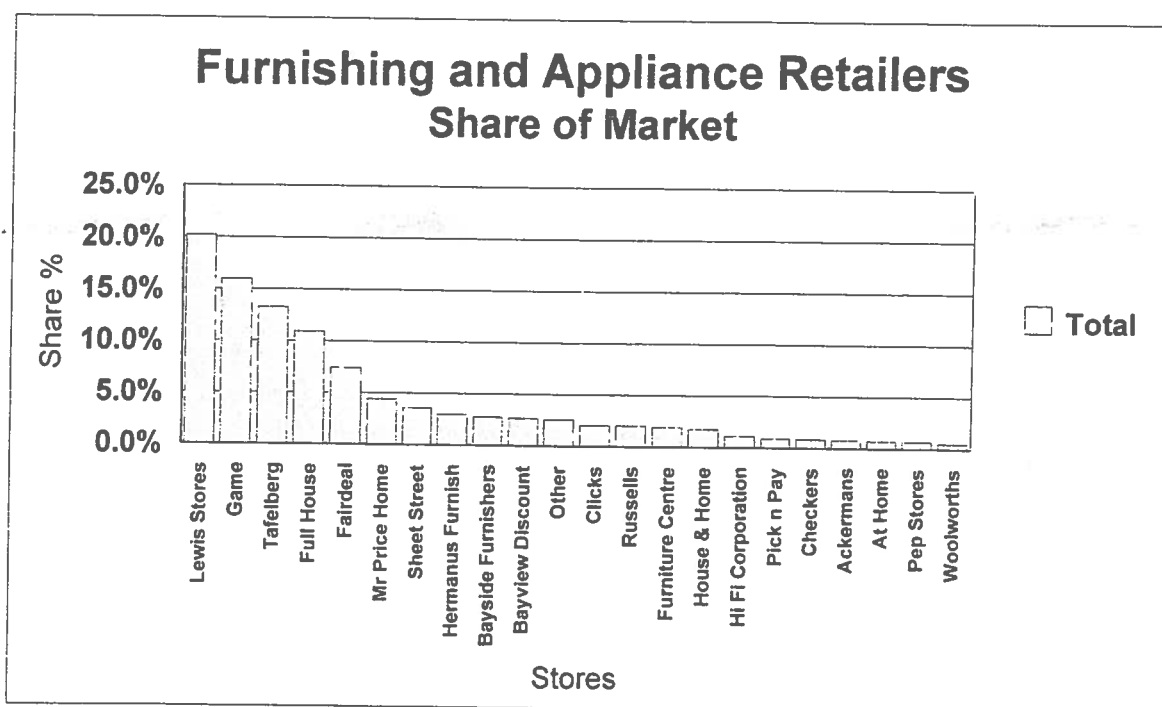
Table 5
Share of Spend at Clothing and Footwear stores during the second quarter 2011

Details	Base	Total	Primary Area			Secondary Area		Primary	Secondary
			AB	CD	EF	AB	CD		
Total	44 451	44 451	10 370	12 006	4 367	7 671	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%	16.0%	8.9%	14.0%
Foschini	6 189	8.8%	10.3%	5.2%	8.8%	9.4%	18.5%	6.2%	12.8%
Ackermans	6 478	7.8%	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	1 666	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%	1.9%	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

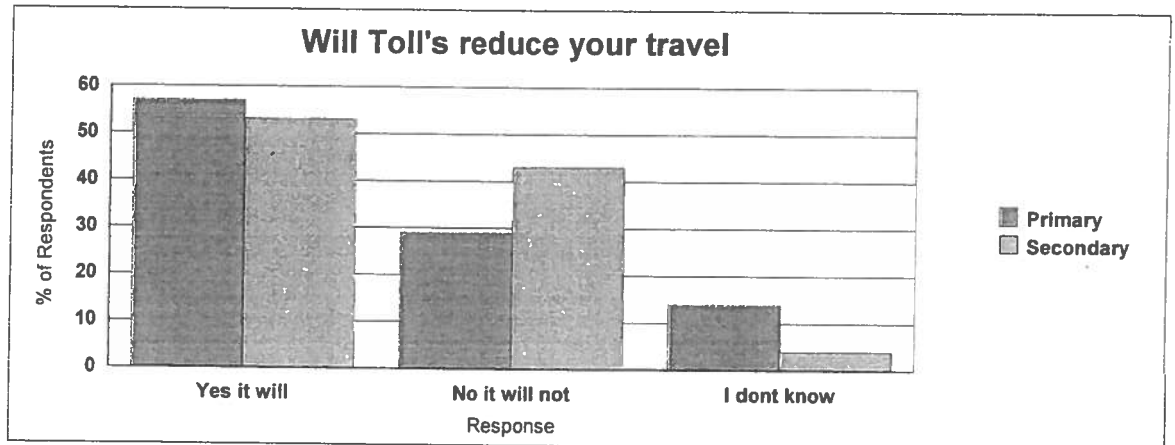


Table 7.2
Attitudes to proposed new Toll Plaza's

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

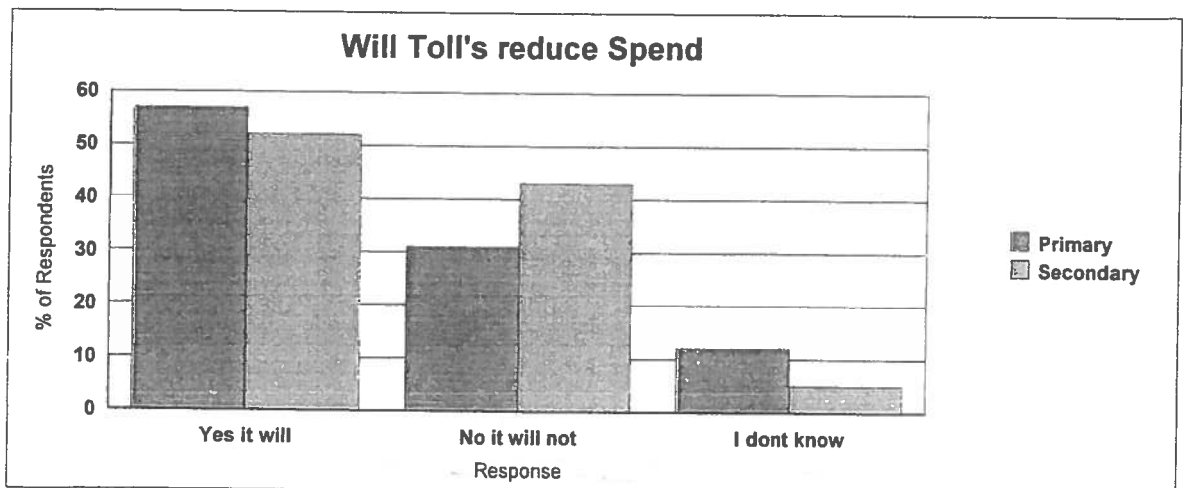


Table 8.1
Attitude to Proposed One -Stop shopping centre in Hermanus

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	12 006	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

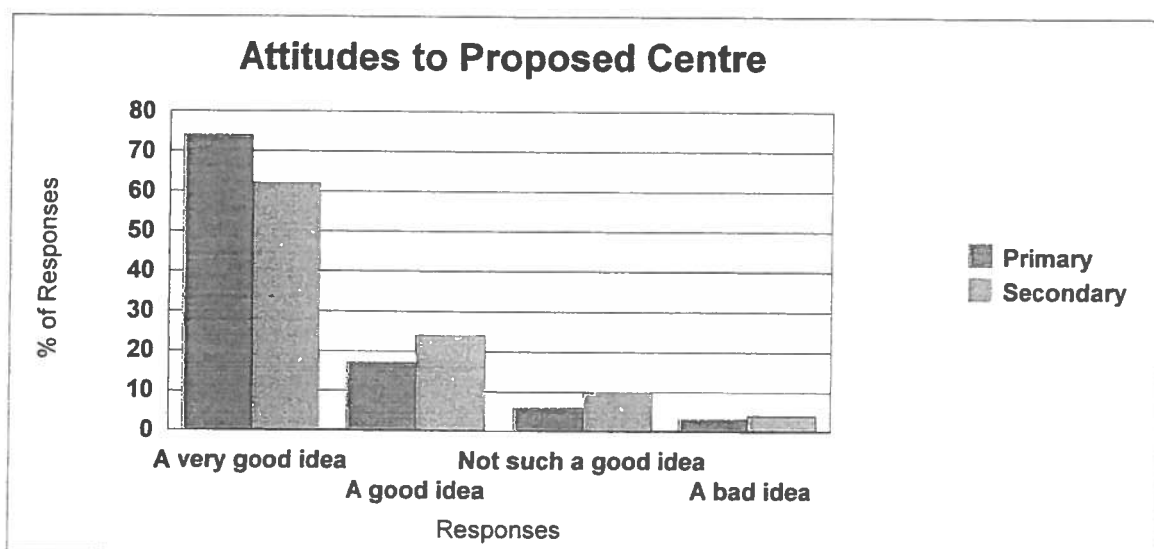


Table 8.2

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

Details	Total	Primary Area			Secondary Area		Primary	Secondary
		AB	CD	EF	AB	CD		
Base	39 692	8 428	11 665	4 367	6 033	9 300	24 360	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	1 900	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
Othe 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%

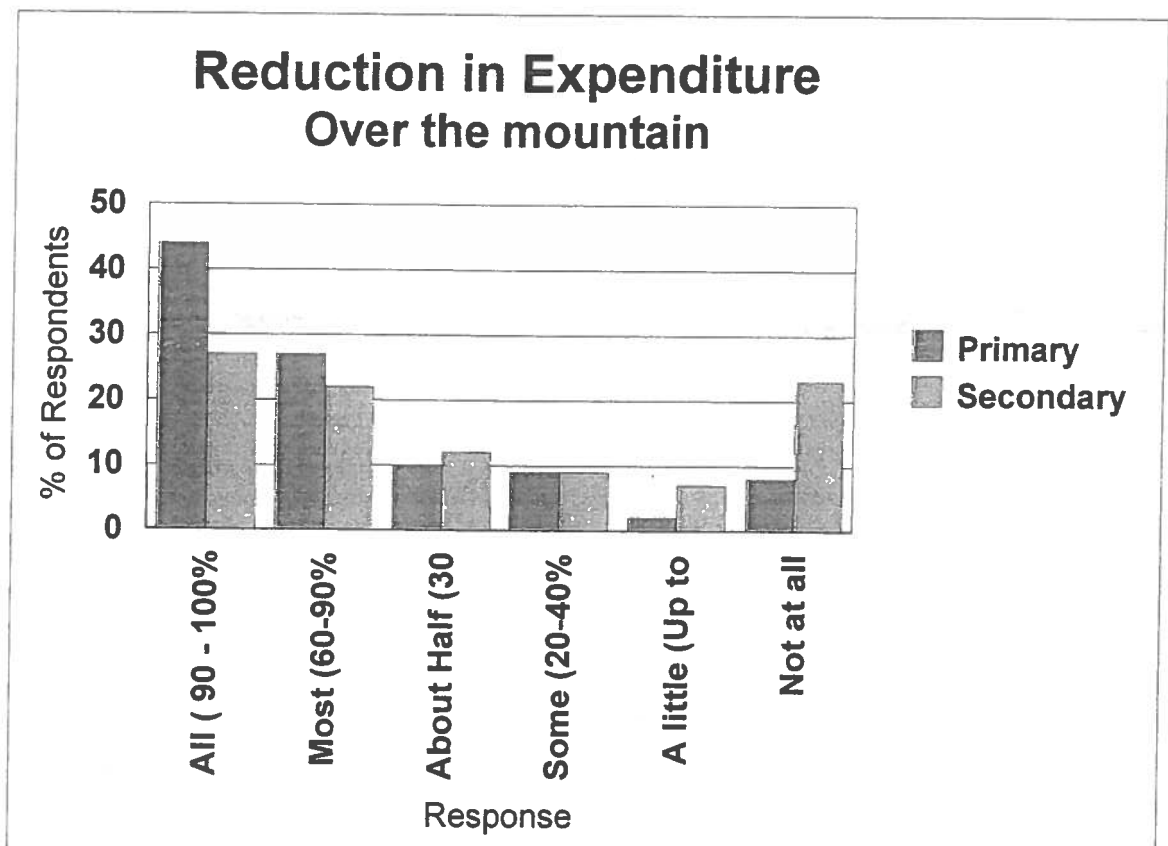


Table 10.1

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	12006	4367	7671	10038	26742	17709
	%	%	%	%	%	%	%	%
Pick n Pay	27	29	24	17	34	29	24	30
Shoprite	18	18	32	20	6	12	23	9
Checkers	16	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

