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MARKET INTEL ACROSS AFRICA

CASE STUDY | API 2025

Presented by

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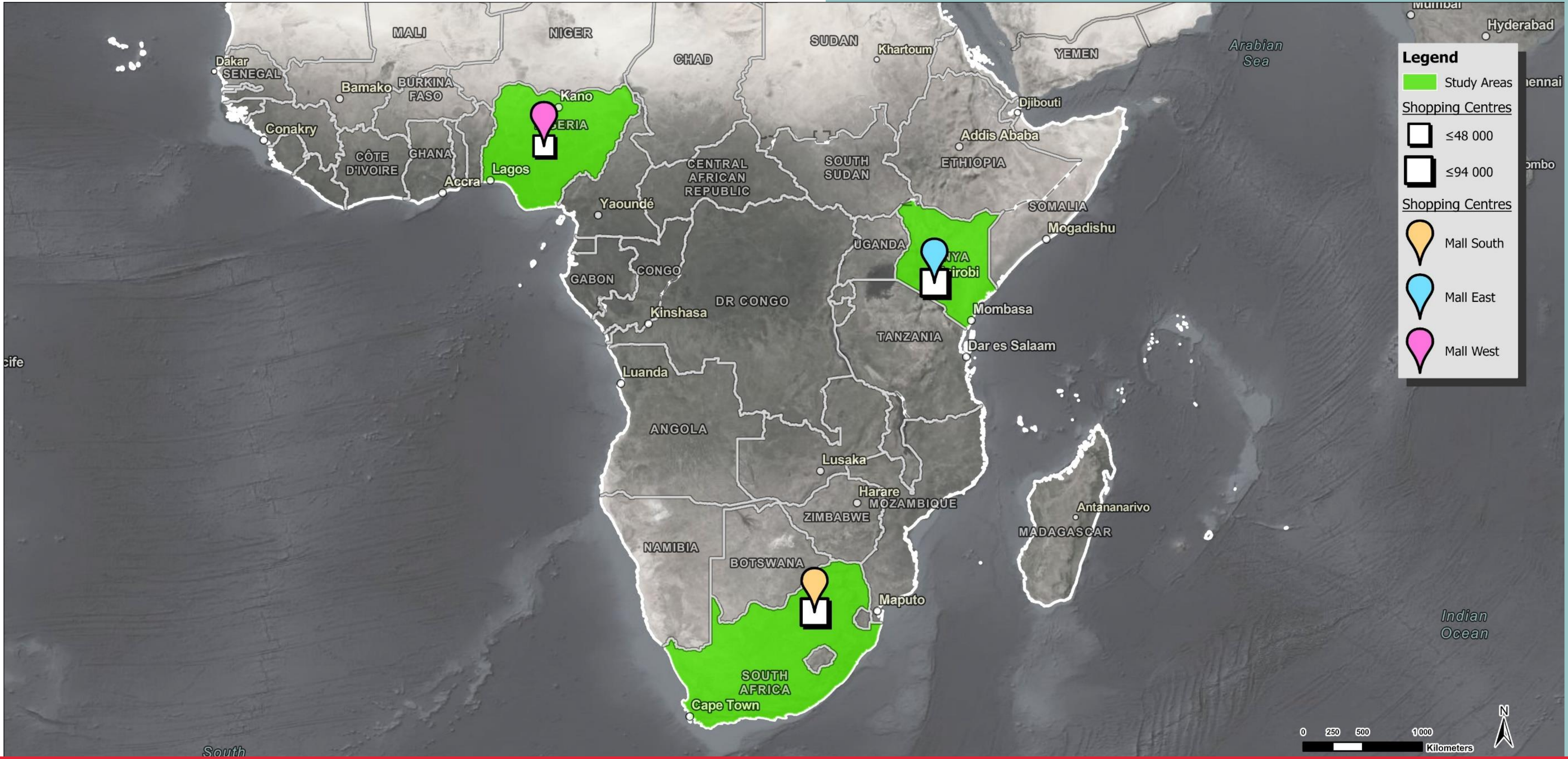
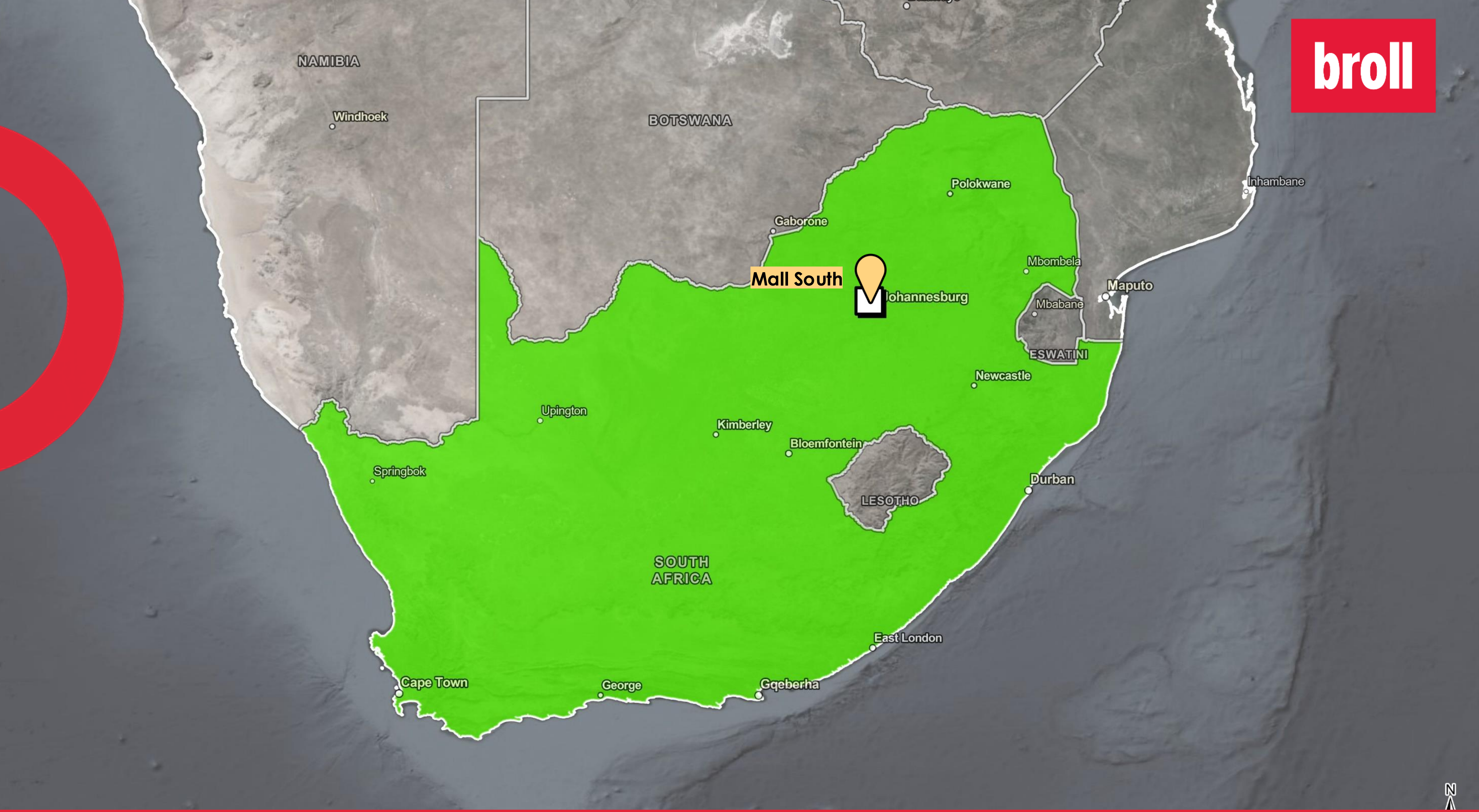
Director & Founder | Fernridge

CASE STUDY
South, East & West African Malls





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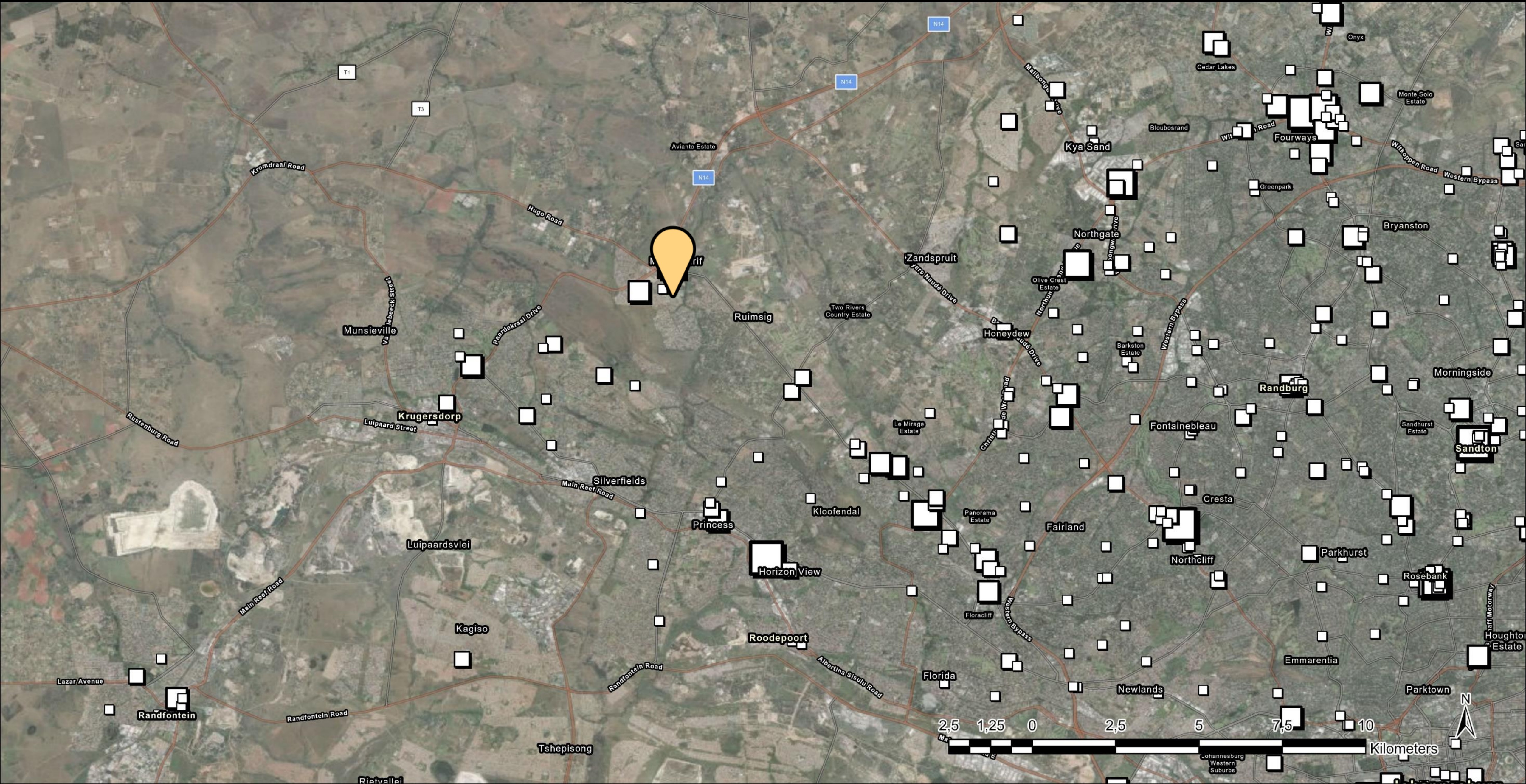
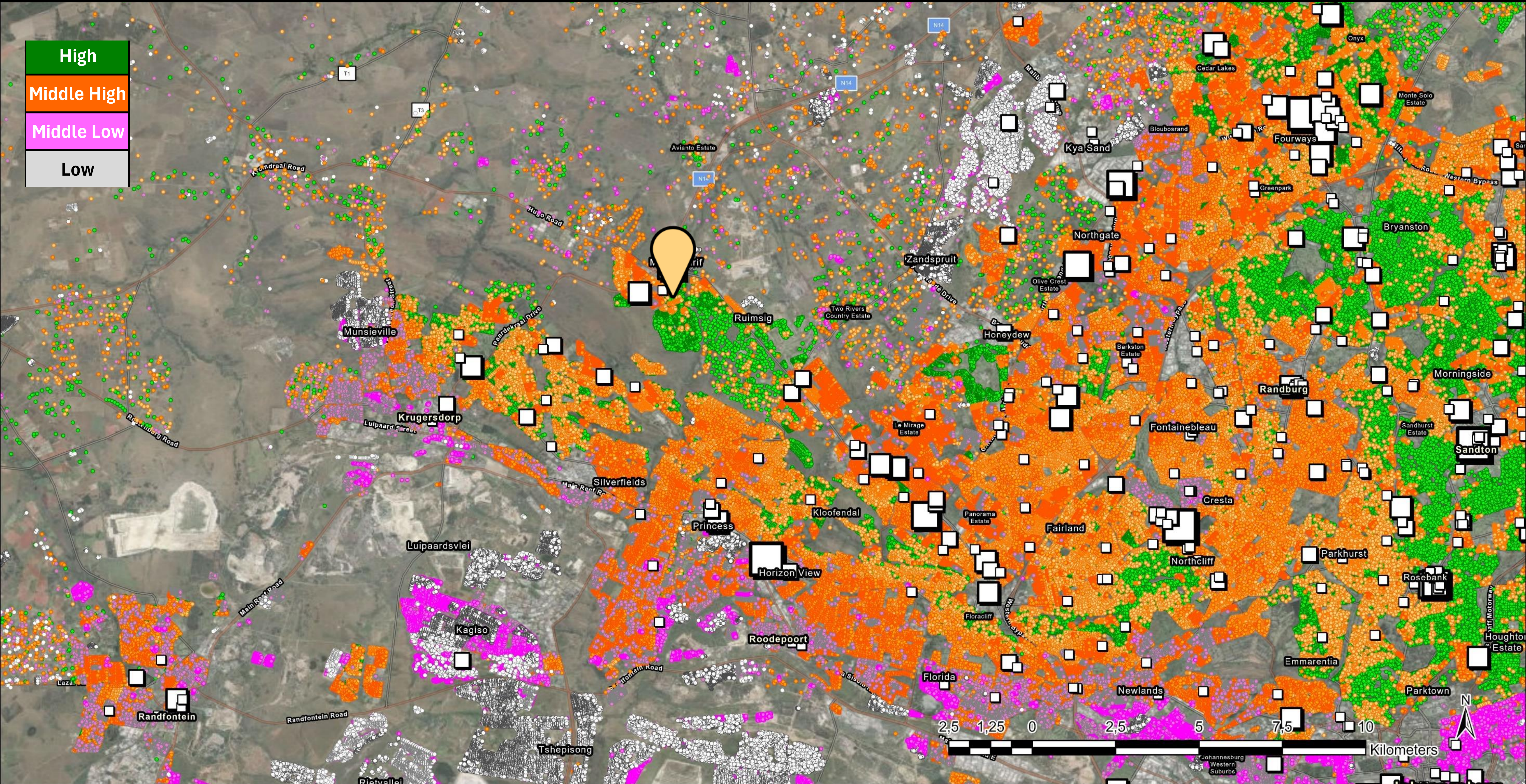
NAMIBIA
Windhoek
BOTSWANA
Gaborone
Polokwane
Mbombela
Maputo
Inhambane
Mall South
Johannesburg
Mbabane
ESWATINI
Newcastle
Upington
Kimberley
Bloemfontein
LESOTHO
Durban
Springbok
SOUTH AFRICA
East London
Cape Town
George
Gqeberha
N

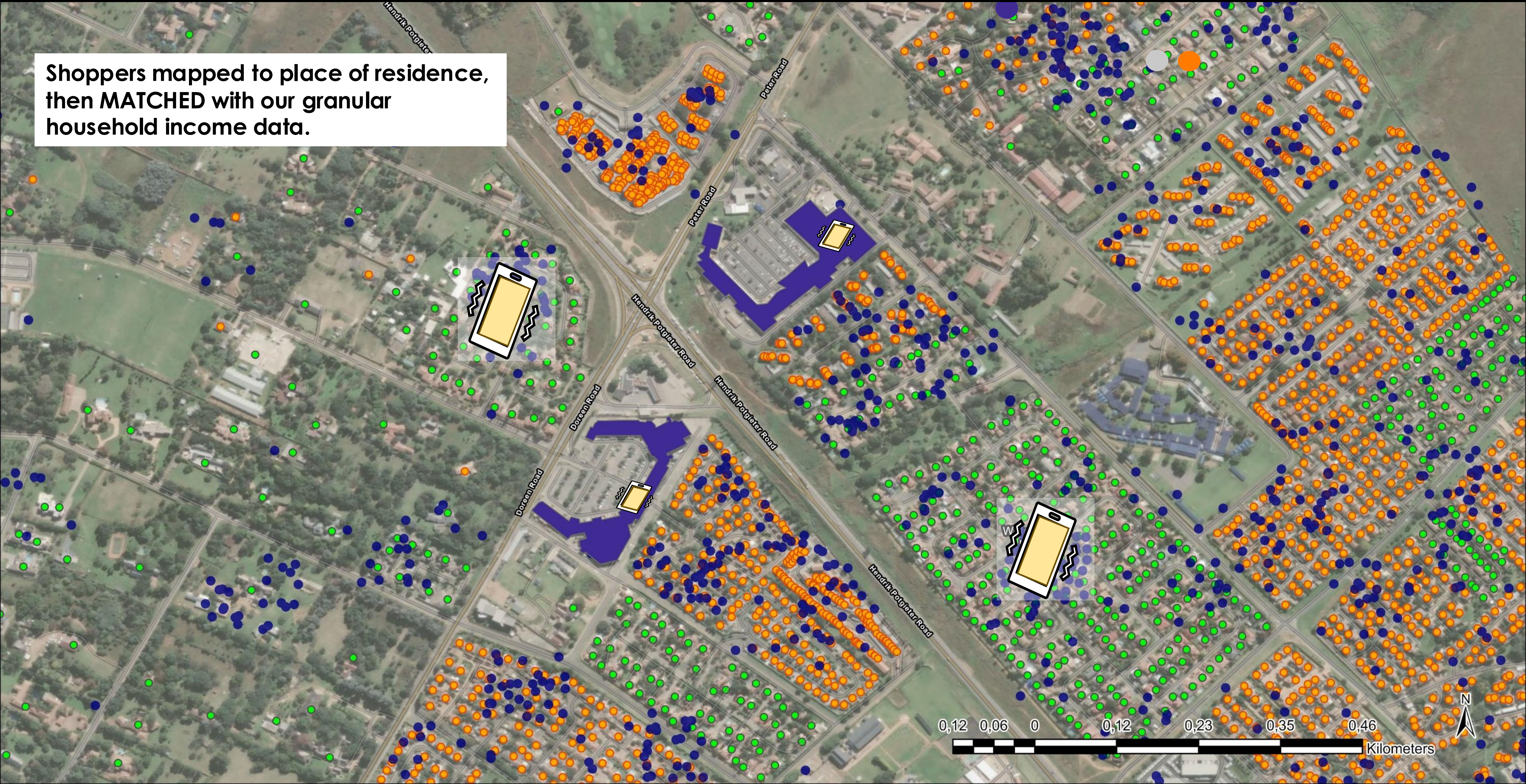
MALL SOUTH – Surrounding Shopping Centres



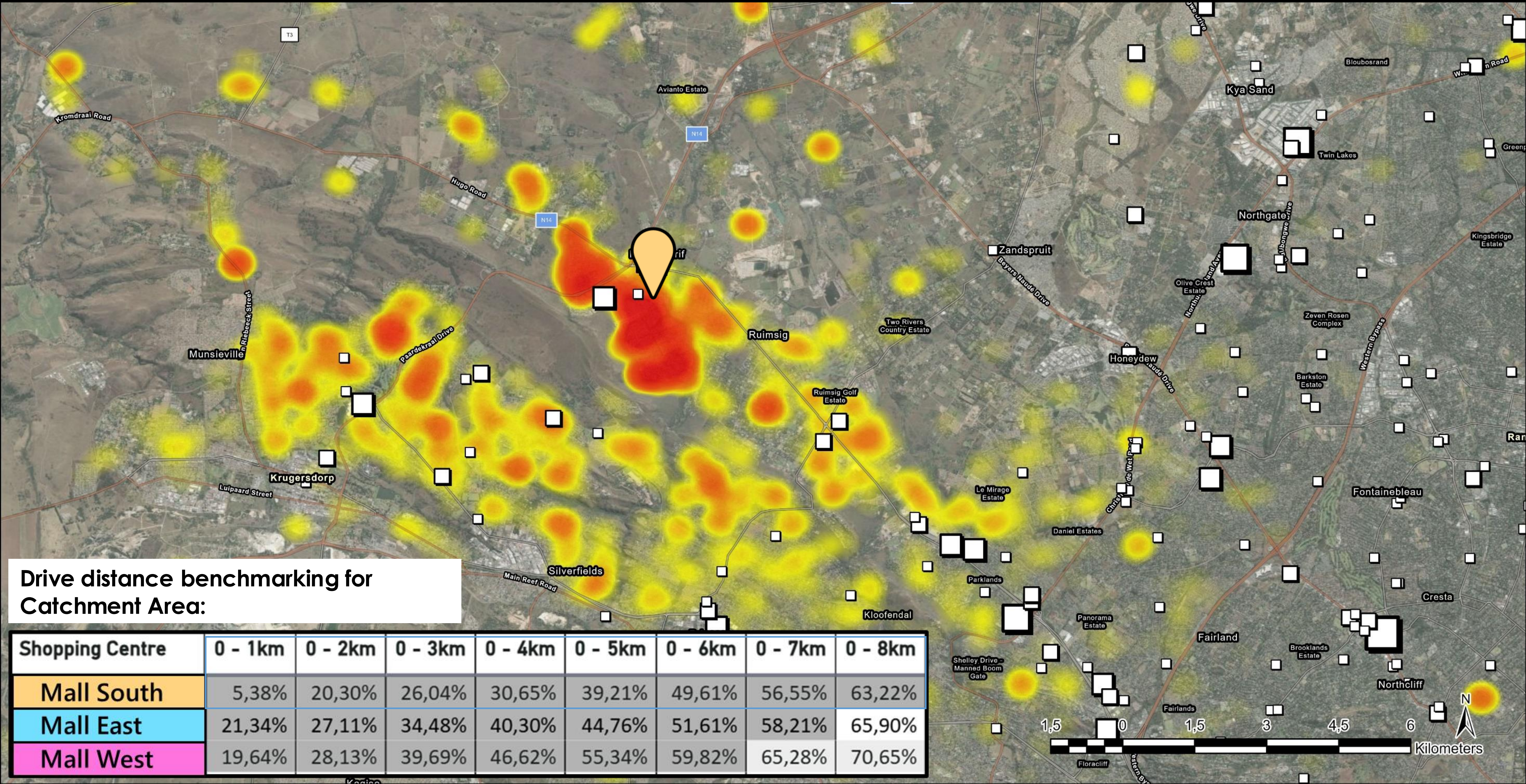
MALL SOUTH – Proprietary, Granular AfricaEye Dwellings



Example of Mall Footprint GEO-Fence



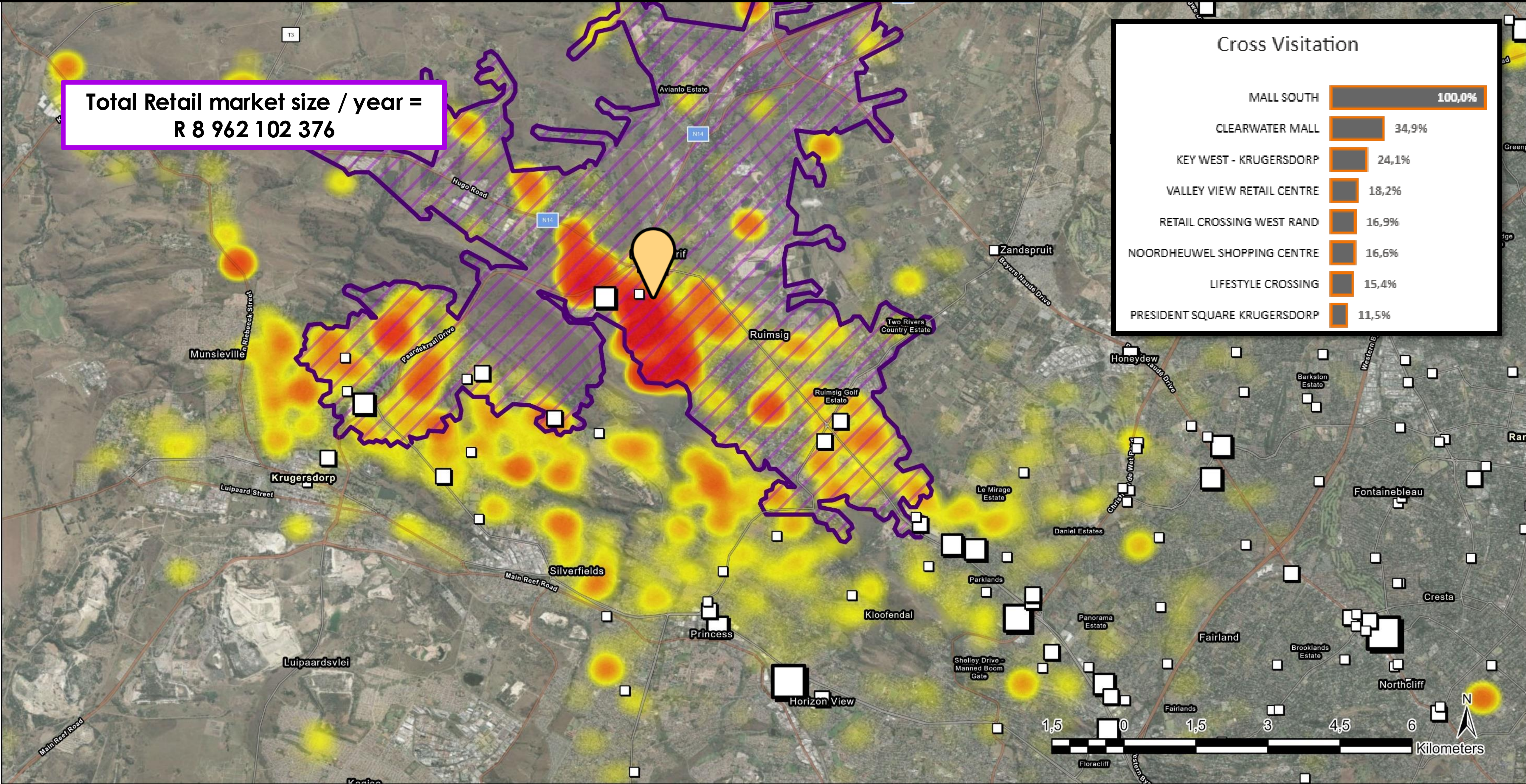
MALL SOUTH – Evening Locations



Drive distance benchmarking for Catchment Area:

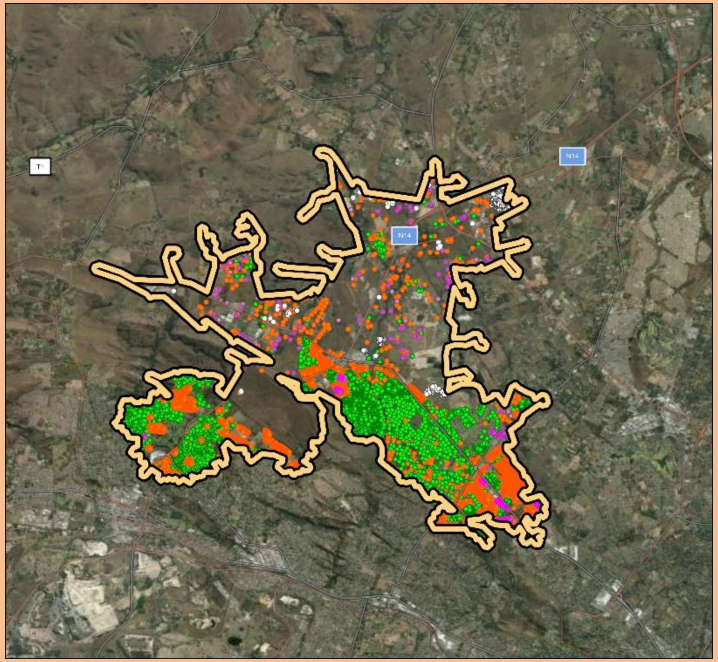
Shopping Centre	0 - 1km	0 - 2km	0 - 3km	0 - 4km	0 - 5km	0 - 6km	0 - 7km	0 - 8km
Mall South	5,38%	20,30%	26,04%	30,65%	39,21%	49,61%	56,55%	63,22%
Mall East	21,34%	27,11%	34,48%	40,30%	44,76%	51,61%	58,21%	65,90%
Mall West	19,64%	28,13%	39,69%	46,62%	55,34%	59,82%	65,28%	70,65%

MALL SOUTH – Nextgen catchment



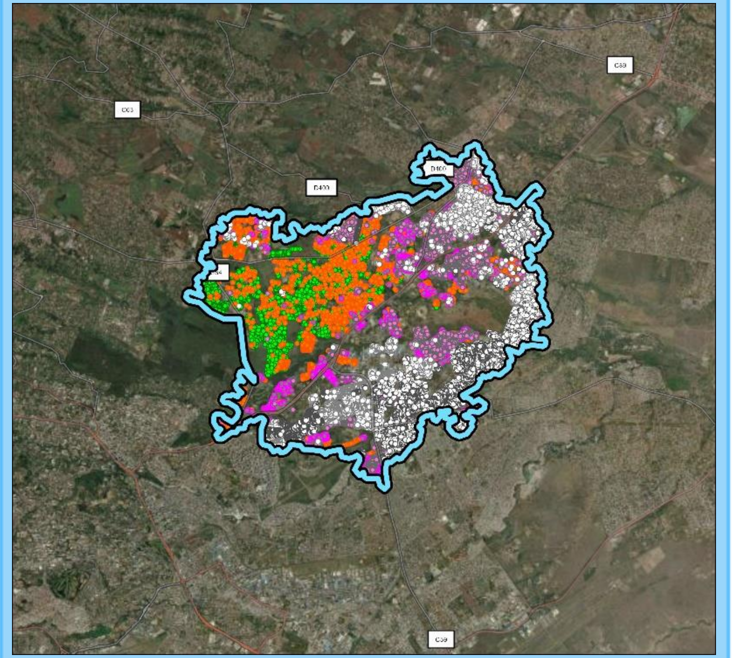
Household Income Comparison – AfricaEye Dwelling Data

Mall South



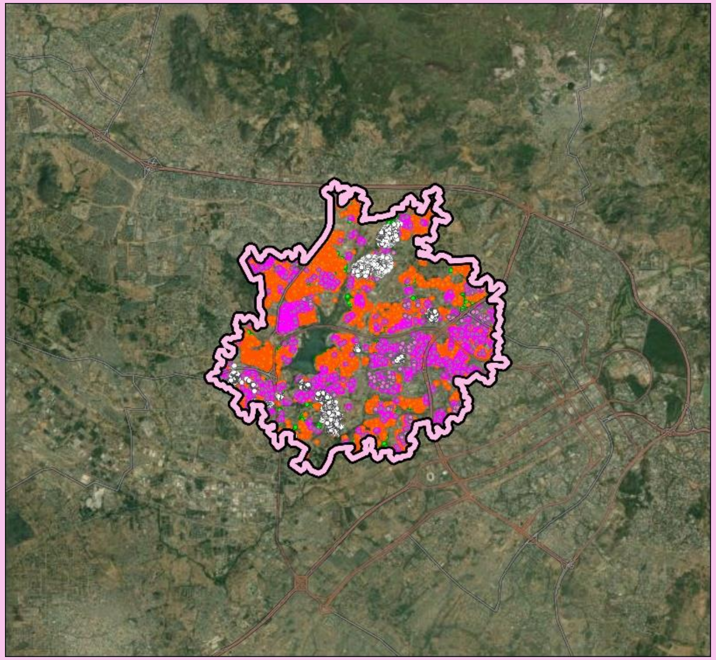
	Dwellings	Distribution
High	6 880	22,5%
Middle High	16 835	55,2%
Middle Low	2 766	9,1%
Low	4 042	13,2%
	30 523	

Mall East



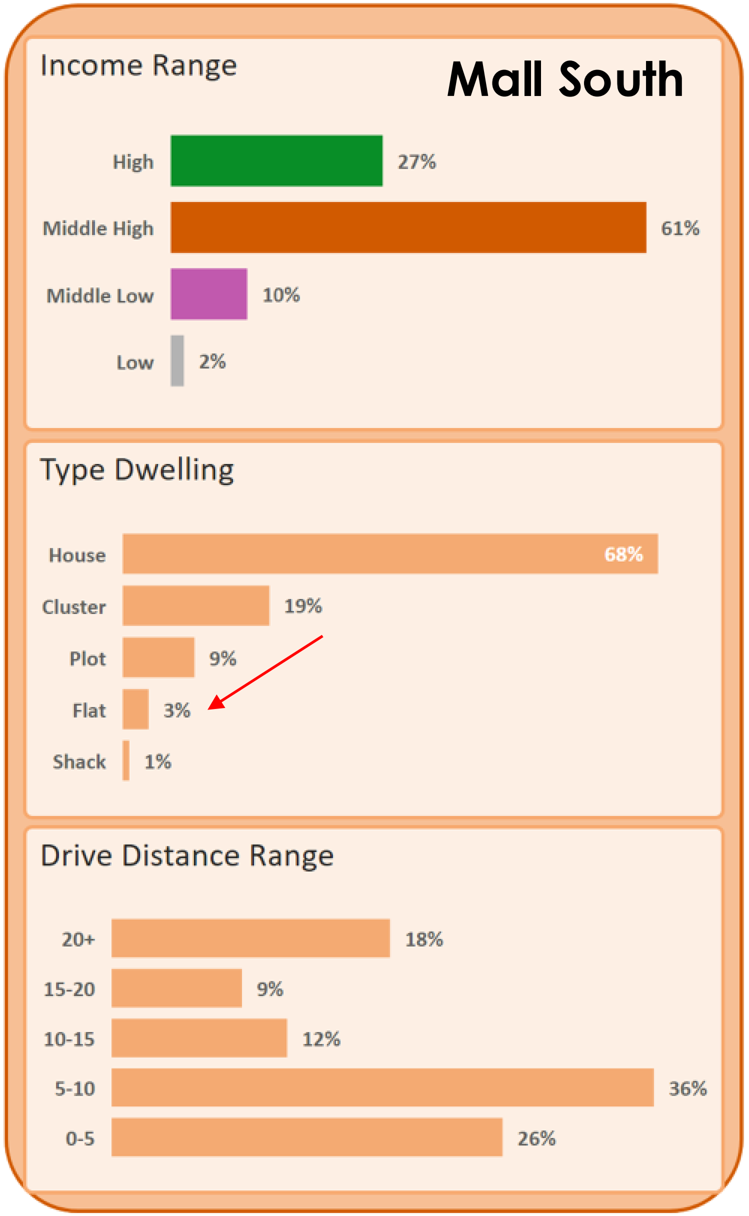
	Dwellings	Distribution
High	2 434	0,9%
Middle High	6 077	2,3%
Middle Low	99 091	37,4%
Low	157 693	59,4%
	265 295	

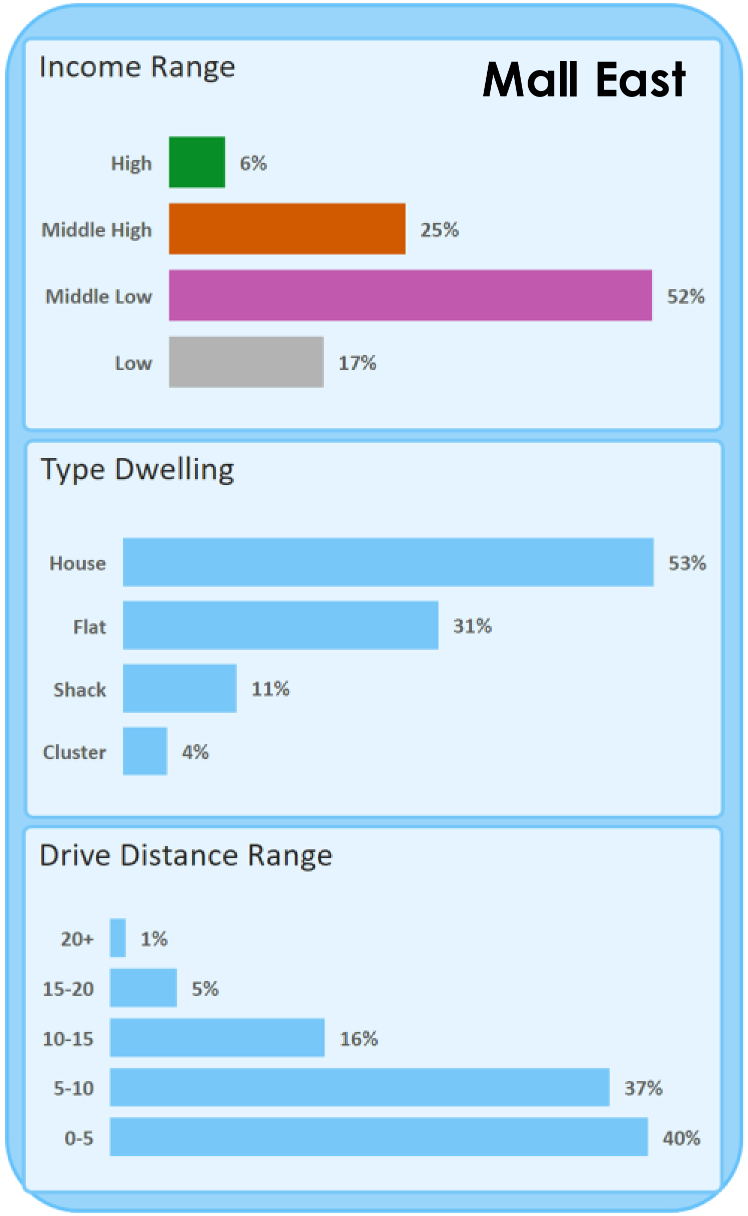
Mall West

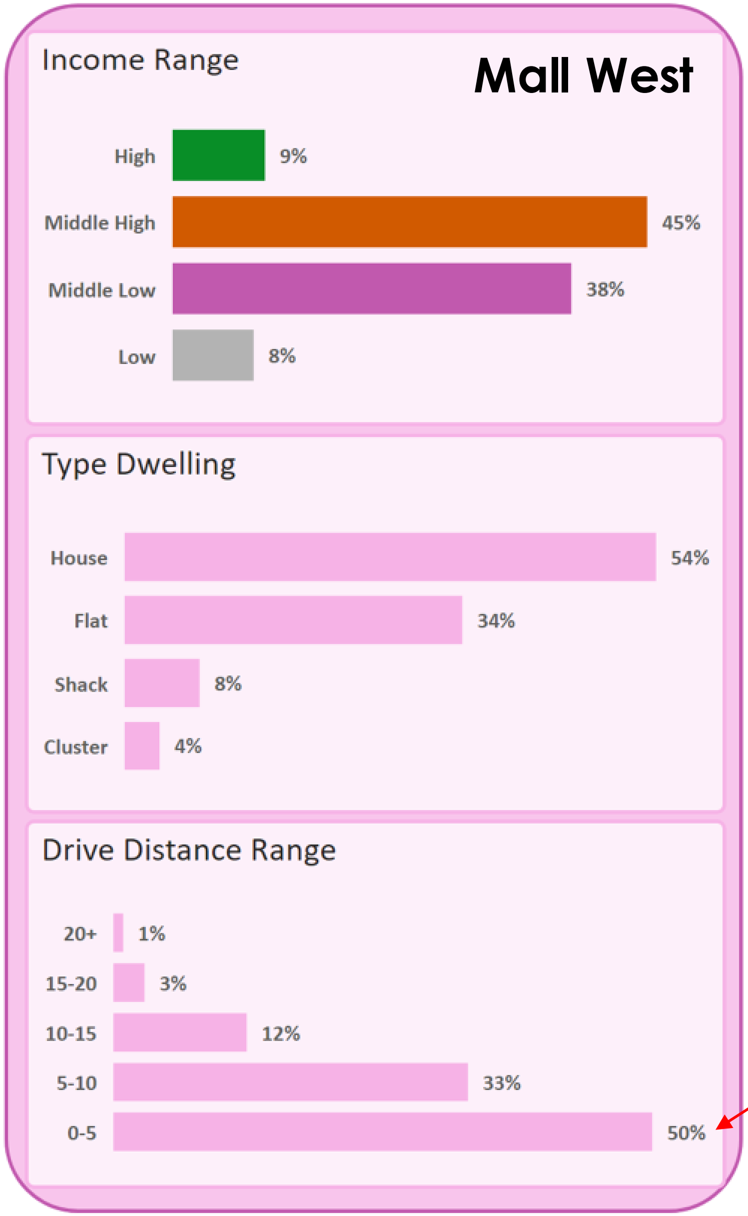


	Dwellings	Distribution
High	941	1,8%
Middle High	20 026	39,0%
Middle Low	21 967	42,8%
Low	8 411	16,4%
	51 345	

Movement Data – Comparisons







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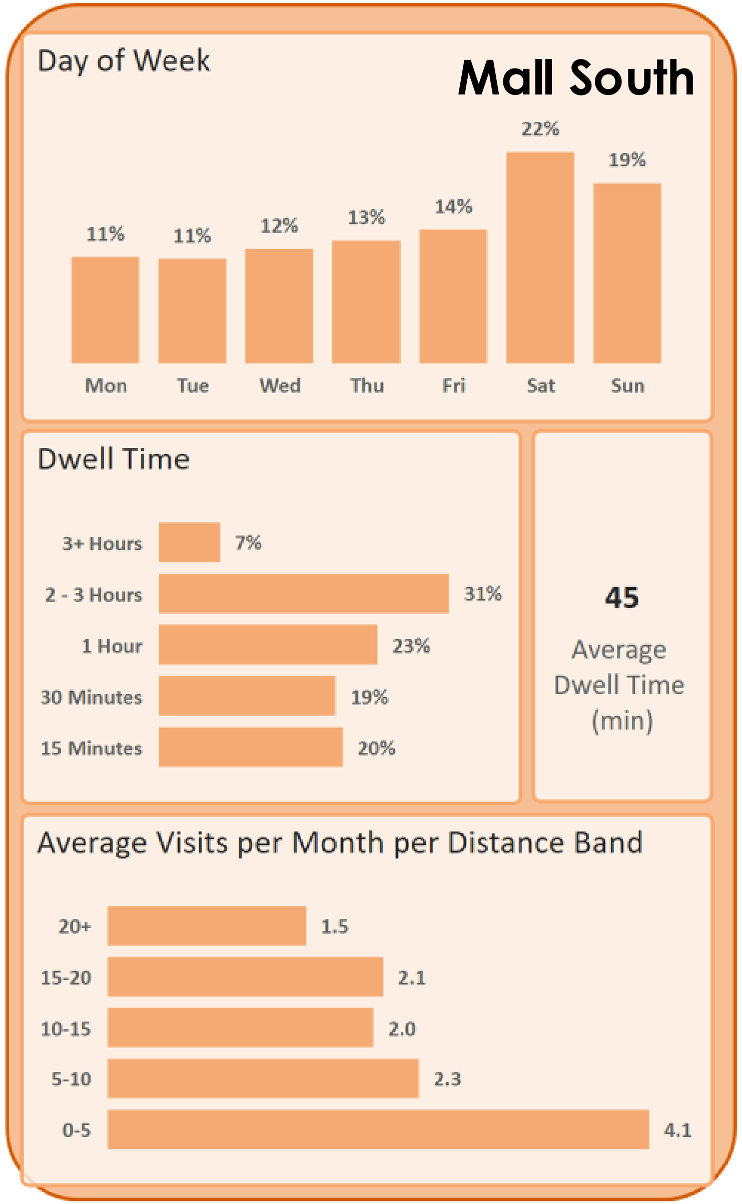

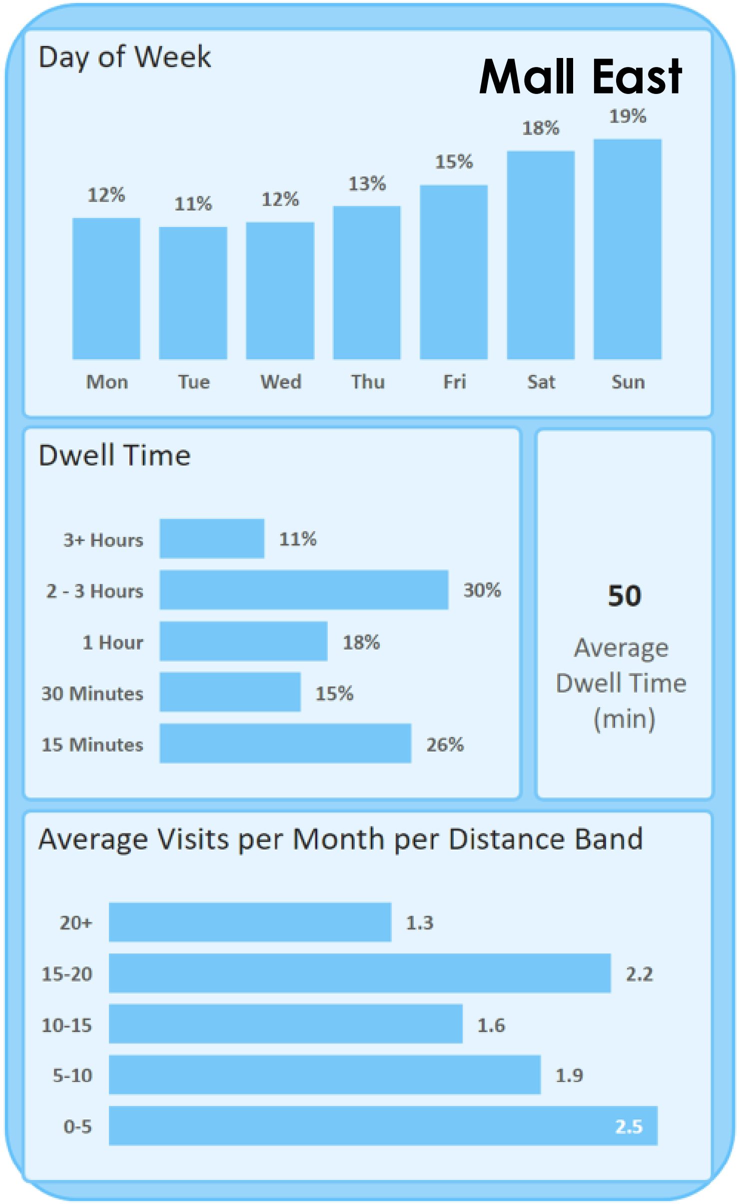

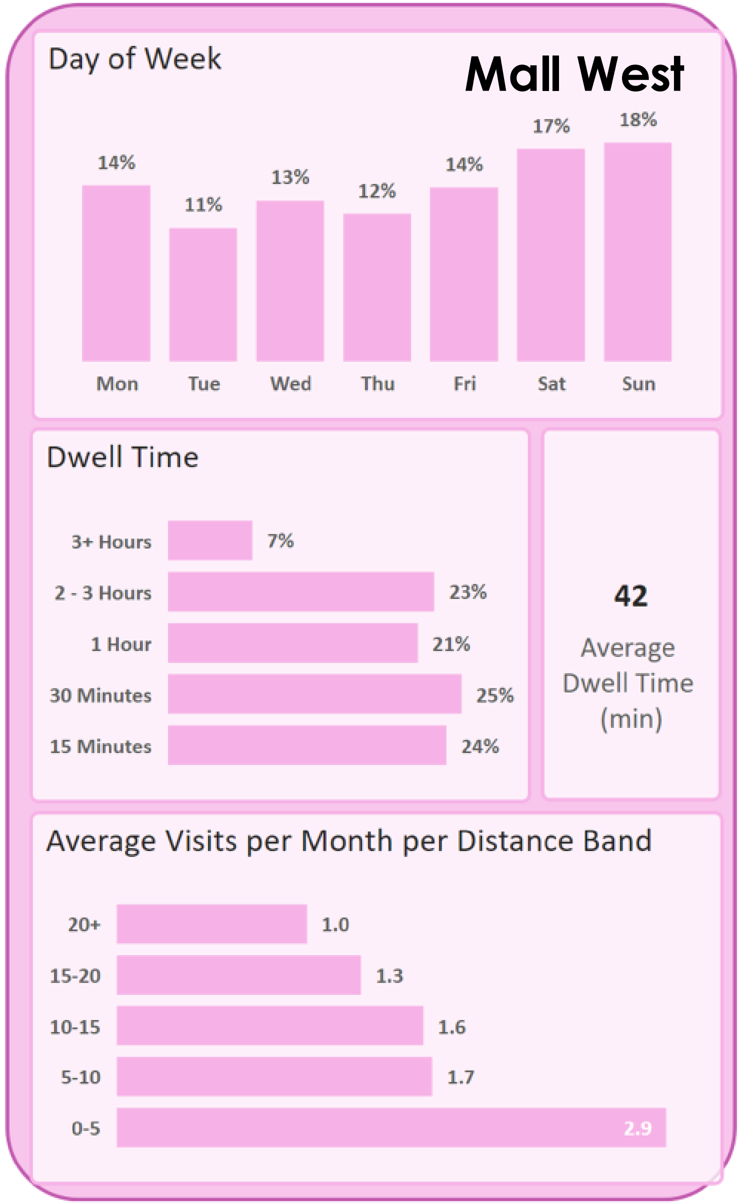

INSIGHTS OUTPUT

Income, movement & behaviour insights to optimise leasing and marketing across Africa.

1.

Matching our granular household income data with ping data, we can gain a much better understanding of the market supporting a mall.

2.

Nextgen **catchment** delineation.

3.

Income demographics coupled with spending benchmarks = **market sizing**

4.

By analysing the movement of customers, along with their income – we are able to see **visitation patterns** of different income groups visiting the mall:

- **Travel distance** of shoppers
- **Dwell time** at mall

5.

Ultimately advising your marketing, leasing and asset management strategies, **OPTIMISING YOUR ASSET AND PAN-AFRICAN PORTFOLIO** broll

Commissioned Research by

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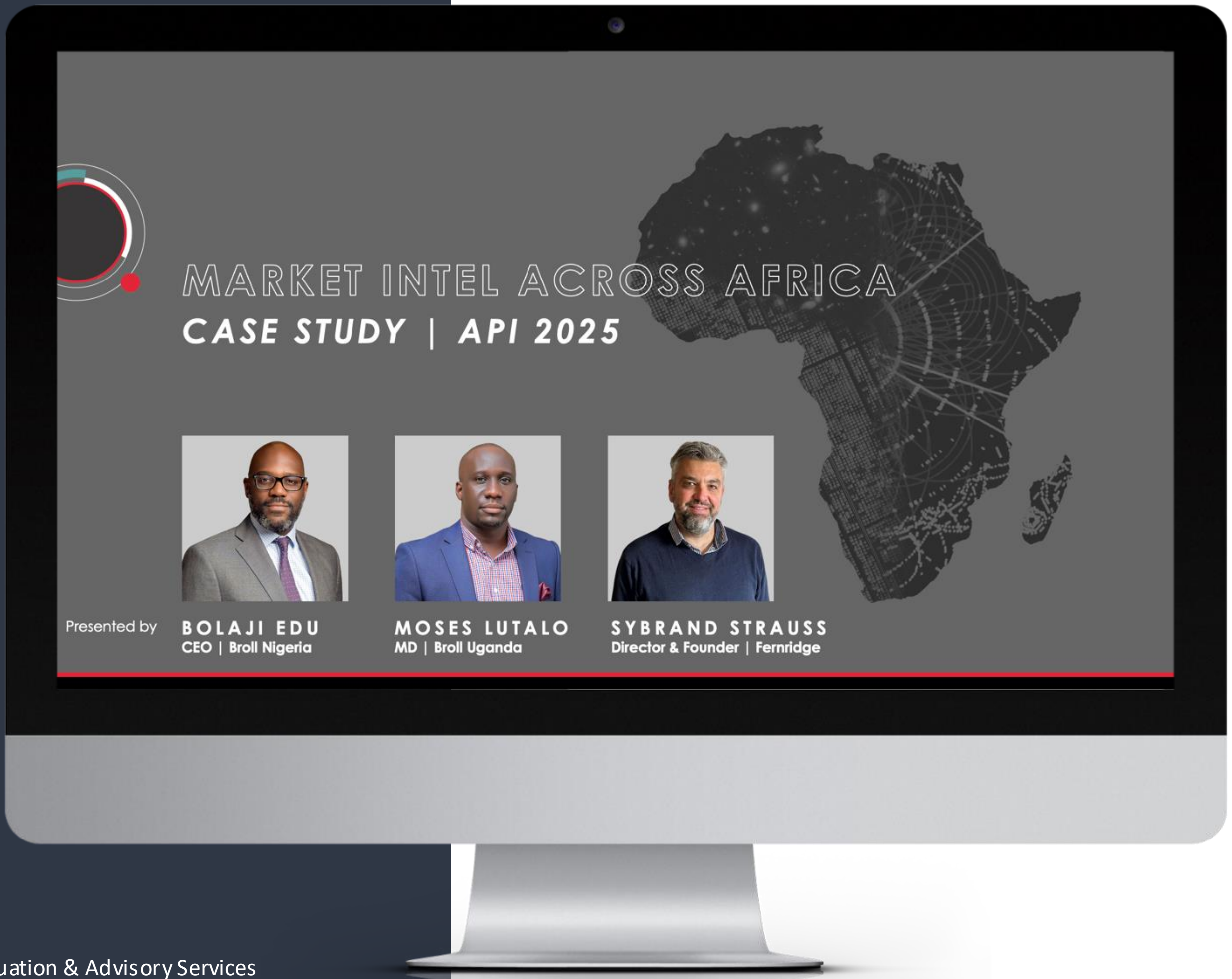
SOLUTIONS



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