

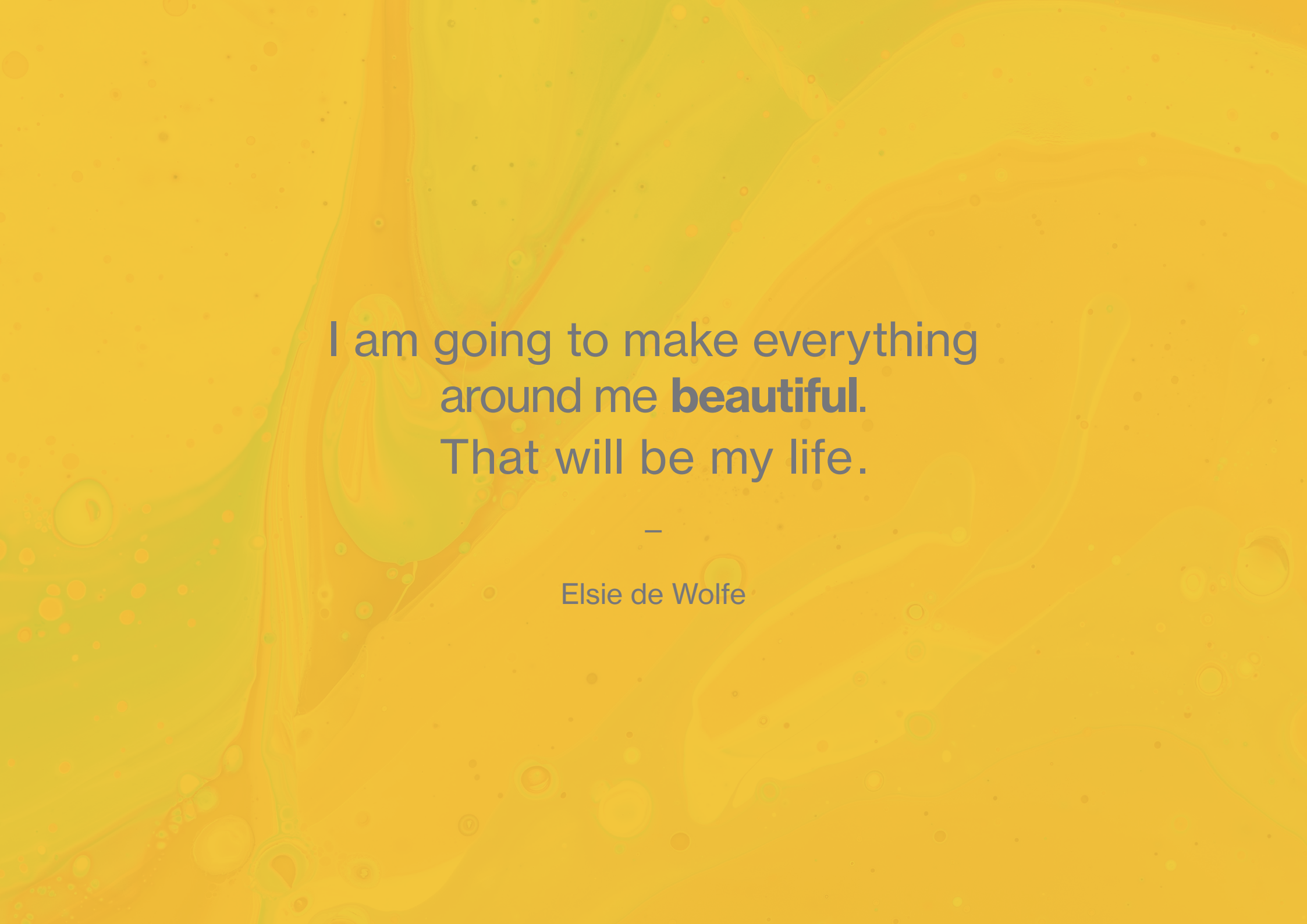
**ATTN. PNA Stationers**  
**Gussie's: A way forward**  
**10 Aug 2021**

*Gussie's*

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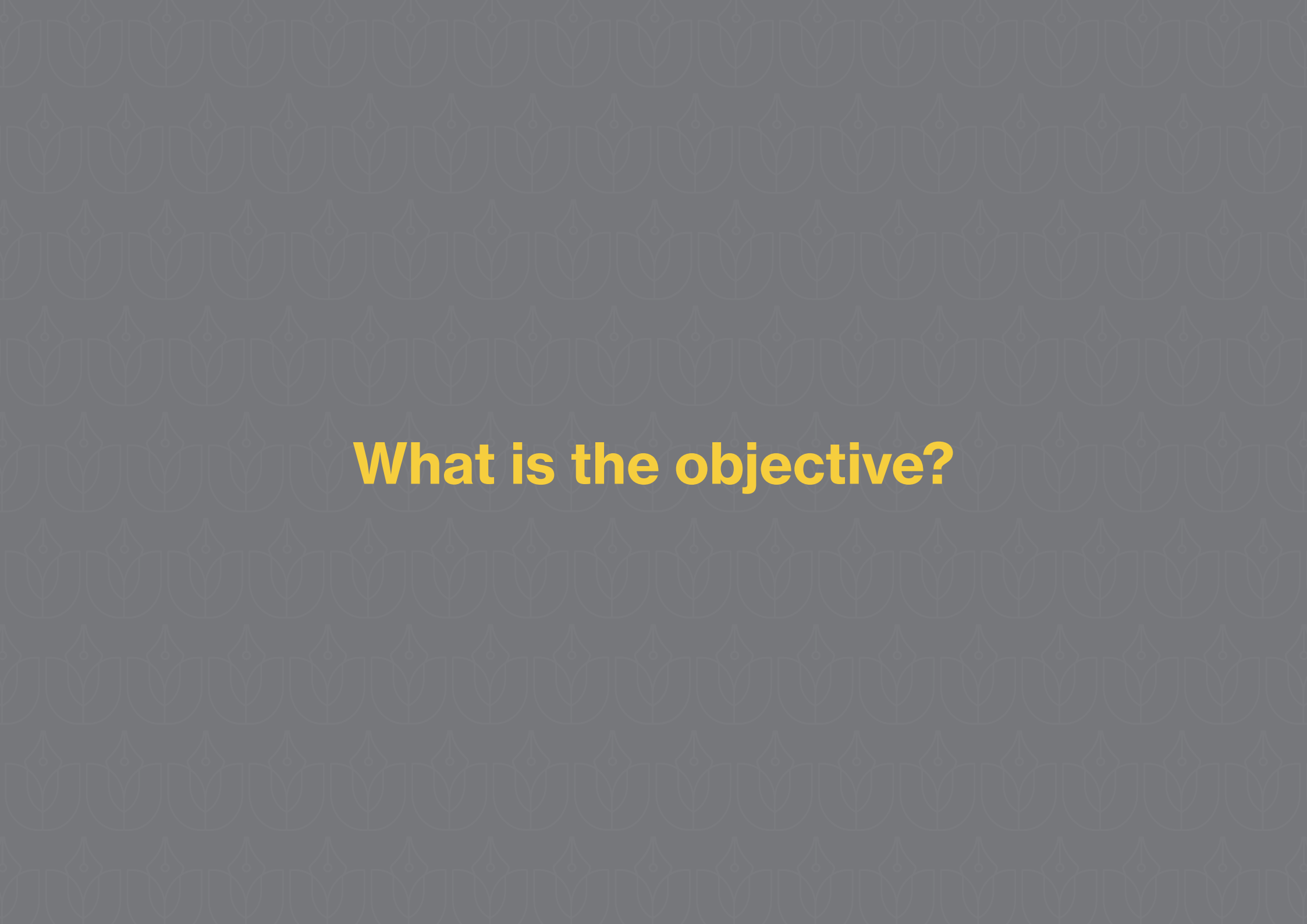




I am going to make everything  
around me **beautiful**.  
That will be my life.

—

Elsie de Wolfe



**What is the objective?**



# What is the objective?

- Split the R8,5 million stock holding between two (2) stores
- Save 25 jobs
- Diversify the product offering to meet the immediate needs of the East London and Gqeberha communities and also drive foot traffic to the stores as school and work environments are shifting and the stationery business needs to adapt to meet these demands
- To create and design a layout that encourages real engagement with store products that will ultimately lead to more transactions

- Keep Gussie Eberhardt's legacy alive, through the Gussie Eberhardt Foundation – assist more people who cannot afford counselling through Eberhardt Wellness + Counselling, and by doing so, we are creating a better structure for the Page Group's CSI programme







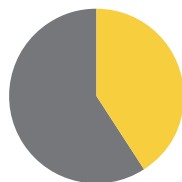
# The bigger picture

- Because our focus will be a community-centred approach, we want to leverage our partnerships in order to give back
- A percentage of the Gussie's range and services monthly turnover will go directly to the Gussie Eberhardt Foundation
- Mental health is an important issue in the Eastern Cape and South Africa and we can make a meaningful impact in our communities through our partnership

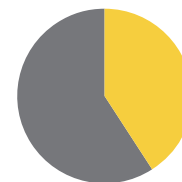
# **Eberhardt Wellness + Counselling**



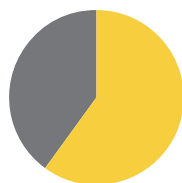
**1 in 6** of South Africans suffers from **anxiety, depression, or a substance abuse disorder**



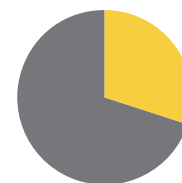
**40%** of South Africans living with HIV have a **co-morbid mental disorder**



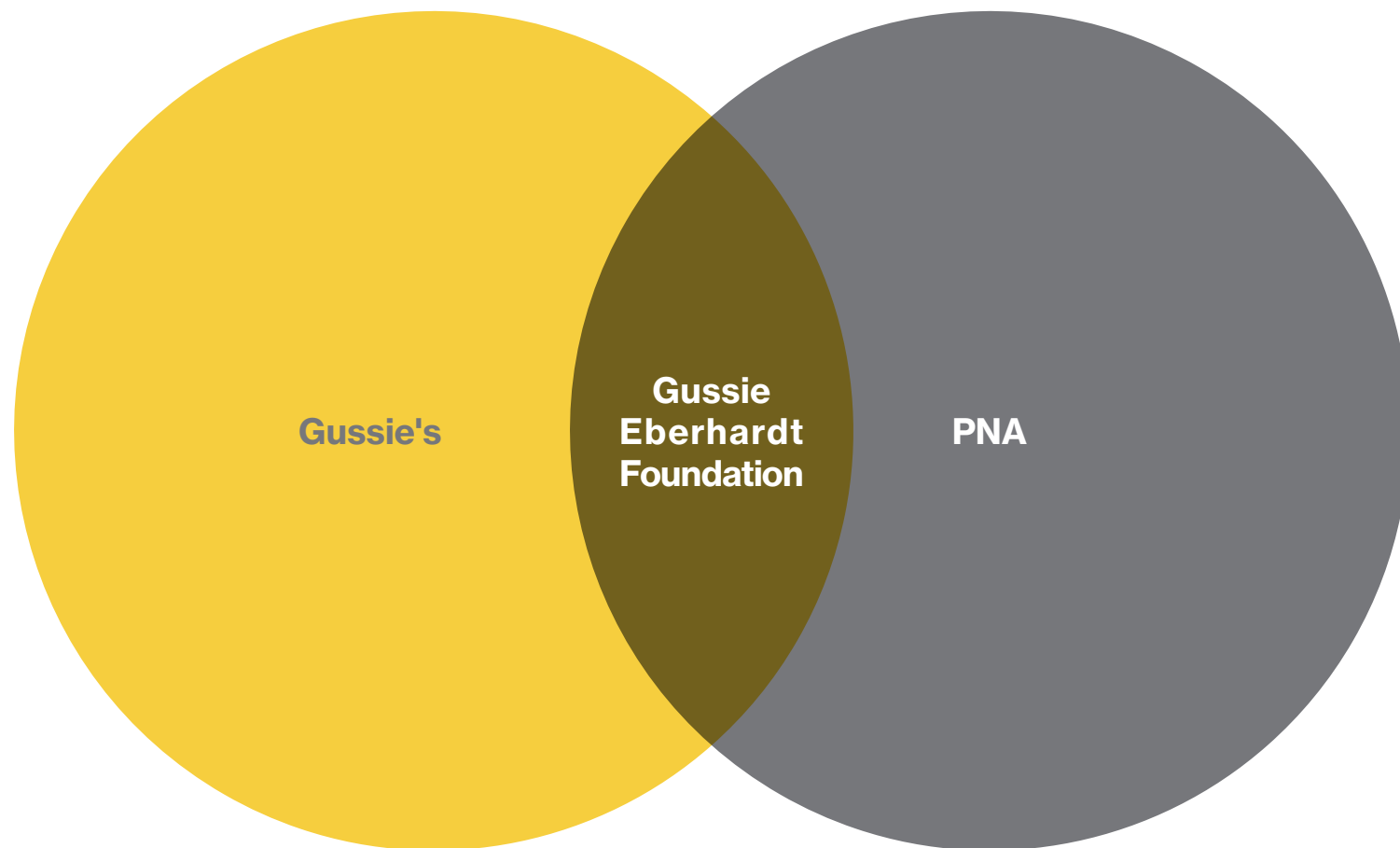
**41%** of pregnant women are **depressed**



**60%** of South Africans could be suffering from **post-traumatic stress disorder (PTSD)**

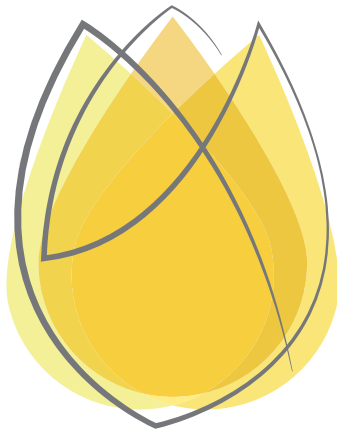


**27%** of South Africans with severe mental disorders receive treatment



**COMMUNITY IMPACT**





**EBERHARDT**

WELLNESS + COUNSELLING

# Meet the Team



**Kayla Eberhardt**  
(B Psych) NMU  
Registered Counsellor



**Nitin Prag**  
(B Psych) NMU  
Registered Counsellor

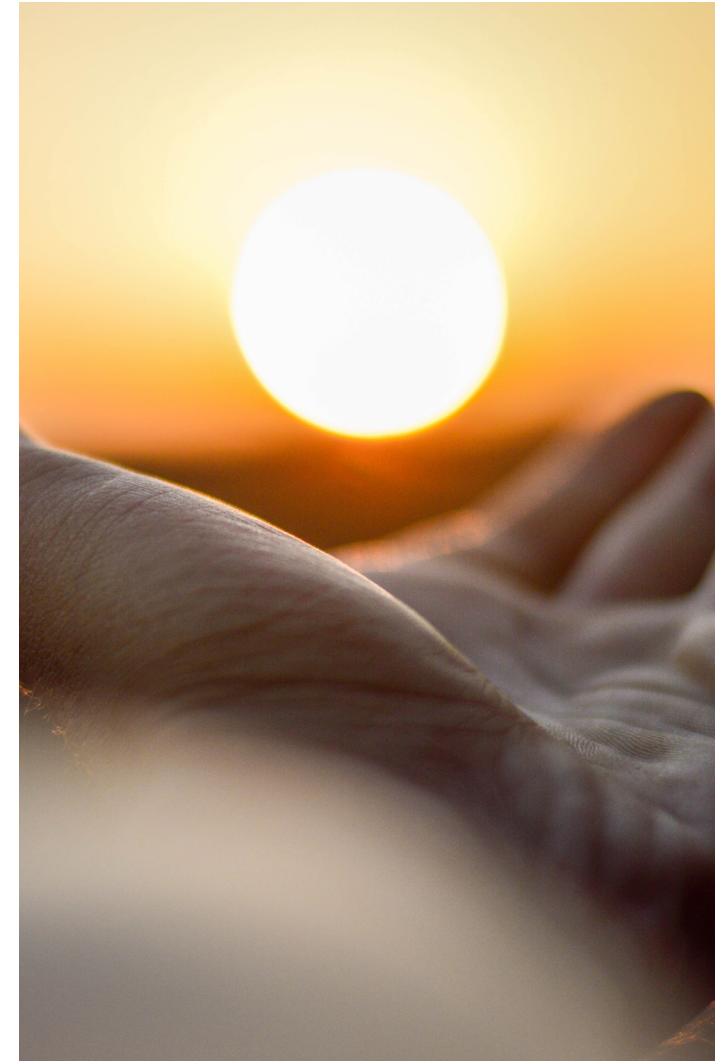


**Shevonina Daniels**  
(B Psych) NMU  
Registered Counsellor



**Sjona Hanise**  
(B Psych) NMU  
Registered Counsellor

- Four (4) registered counsellors committed, first-and-foremost, to providing quality access to mental health care to our community's most vulnerable and to changing the stigma associated with seeking treatment
- The more funding that can be generated through the Page Group's businesses, the more counselling can be extended to vulnerable communities
- We believe that PNA and the Gussie's brands have an opportunity to focus CSI efforts on a meaningful and highly important issue for the people of South Africa



# **The retail landscape**

# Global retail market analysis

## The pandemic is rewriting the rules of retail

The Coronavirus (COVID-19) pandemic has highlighted the need for retailers to rethink how physical space is used in the future. Although much attention over the last year has been given to the overnight boom in E-commerce and the shift away from stores, physical outlets remain a critical part of the shopping journey.

**Euromonitor International estimates that, in 2024, 76% of goods will still be bought in-store, although that would mark a reduction from 81% in 2020 (Euromonitor International, 2021).**

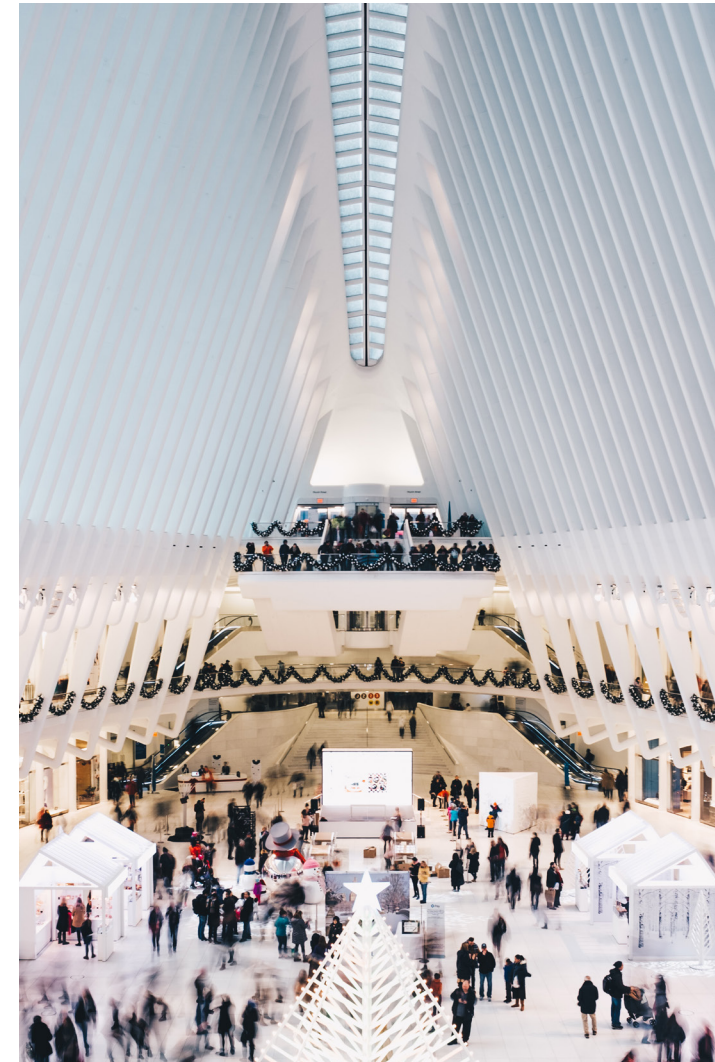


## Physical stores re-imagined

- Due to the pandemic, many retailers have adopted creative solutions and new strategies by shifting traditional store offerings to experiment with pop-ups, store-within-a-store, and mobile (shop-on-wheels) concepts
- Companies reassess physical store location and space as the pandemic caused many stores to close their doors in dense metro centres
- As consumers flee big cities (read South African stats [here](#)) localised, community-centred offerings are likely to gain traction as businesses move into smaller cities and suburbs



- Physical retailers tackle increased pressure on their supply chains by better leveraging stores to fulfill online orders





**Downsize**

**Bet on Suburbia**

**Explore new concepts**

**Focus on  
operational  
efficiency**

# Four (4) key drivers for the “new normal”

## Retailers need to adapt to remain relevant in a shifting landscape

### Key lessons for retailers

- Physical retail needs to adopt a multi-dimensional approach beyond E-commerce. To stay agile and adapt, it is necessary to re-examine location, size, and its role in the future. Stores need to operate as:
  - + Branding vehicles
  - + Engagement areas
  - + Fulfilment centres
  - + Selling spaces



- COVID-19 pushed companies of all types to look for new digital sales channels and unusual partnerships to boost revenue - omnichannel marketing will become the norm for retailers moving forward.
- The suburbs and smaller cities offer huge opportunities for retailers. Such locations are well-positioned to capitalise on the influx of shoppers already fleeing big cities, spurring growth in smaller metropolitan areas at a fraction of the cost. Word of mouth and interconnected communities in smaller cities and towns offer an opportunity for partnerships with locals. Brands that are community-centred and offer personalised experiences create brand loyal followers who turn into advocates.

# The stationery market in South Africa and Africa

- **According to 6mresearch, South Africa's stationery market size is expected to grow into 2026.** The paper segment is dominating in the stationery market revenue share in South Africa on account of the rising demand for various **paper products such as books, notebooks, sheets, and others in various applications** and also due to demand for **quality packaging**.
- The pandemic showed a decline in economic growth owing to the Coronavirus pandemic which had a significant impact on worldwide business. However, during the second half of 2020-2026, the stationery market in South Africa has started to recover and shows the potential for healthy growth in the economy.

- **The education segment is expected to hold a large revenue share in the stationery market over the upcoming years in South Africa on account of the rising number of new educational institutions and universities.**
- According to a report from GoldStein, a major driver in the African stationery market is the improvement of the education sector and the rising number of student enrolments in school.
- The education sector accounted for the highest market share of 75% in 2017 and will continue to dominate the market during the forecast period (2017-2030). The commercial stationery market is likely to grow at a lower pace owing to less industrialisation in the region.
- Geographically, South Africa accounted for the largest market share of 35% revenue in the Africa stationery market. South Africa region is likely to dominate its position in

Africa attributed to significant growth in the commercial and education sector in the country.

- **The growth in higher education has risen from 2.7-million in 2000 to around 7.8-million today. The growing number of student enrolments in the region will significantly augment the growth of the stationery market in Africa.**
- The student market offers an opportunity of untapped potential for stationery stores but needs to find new innovative ways of reaching this market.





**Our proposal:**

—

**Dynamic retail experiences for dynamic communities**

In an effort to appeal to next-generation shoppers, digital displays and "Instagrammable" features have replaced rows of shelving and cluttered stands, creating modern spaces with the intent to influence how consumers perceive and experience the retail environment. This transformative value proposition provides a sense of community, a shared experience, something to engage with.

—

**Reference:** [Surface and Panel](#)



## Better business

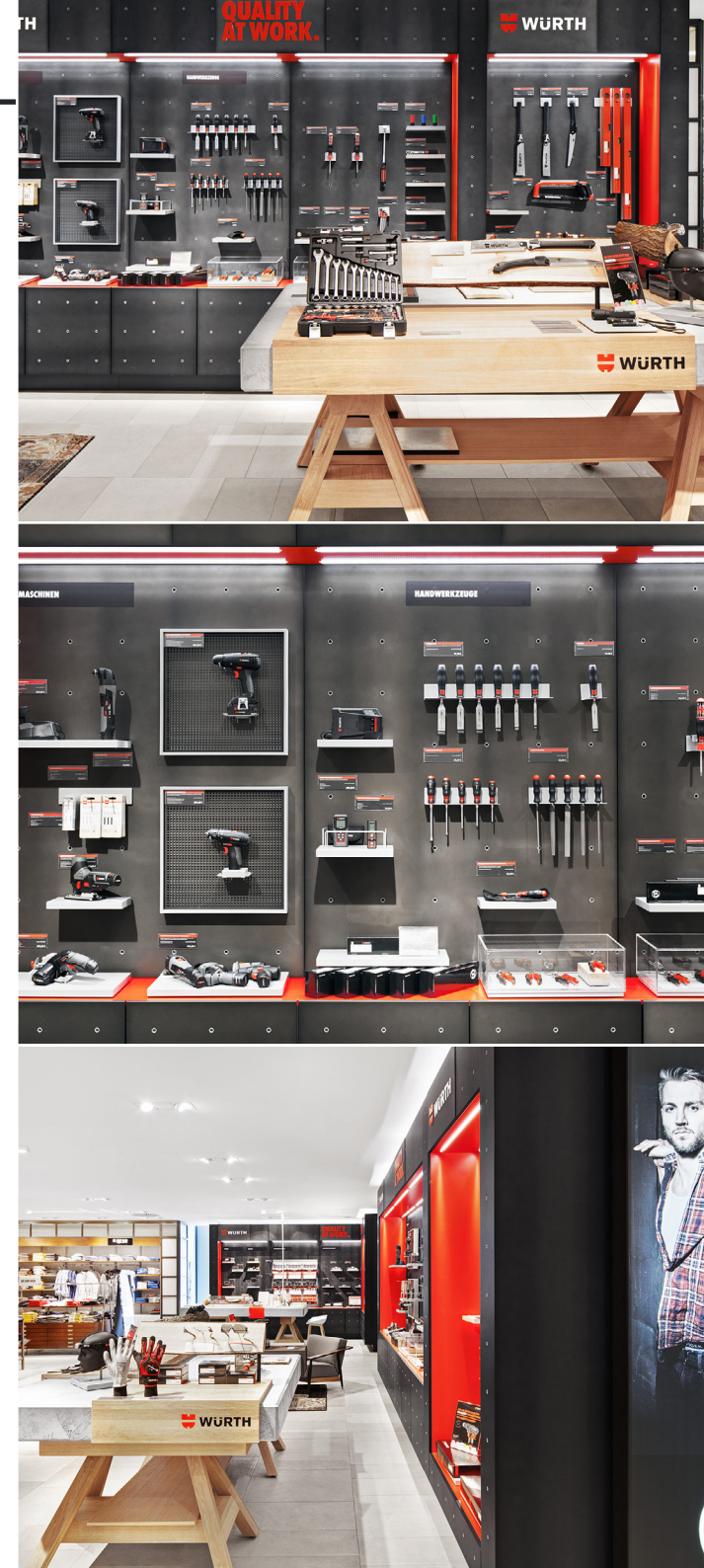
- We need to reduce expenses for PNA East London to be a viable business, this means cutting operational costs such as a possible move from the PNA Nahoon building to our 17 Vincent Road premises
- WHY? **Massive savings** in our operating costs.
- There will be a reduction in floor space, from over 200 m<sup>2</sup> to approximately 180 m<sup>2</sup>
- However, we firmly believe that with a re-imagined floor design, engaging displays, and very community and interest-focused sales approach, we can create a better customer experience and ultimately sell more product

- We want the PNA and Gussie's partnership to offer communities an experiential shopping experience that will delight and surprise consumers
- Innovative product offerings and partnerships with students, local artists, influencers, and creatives to bolster sales and create brand loyal advocates who will help us to build a strong brand within the community
- This community-centred approach will enable us to become relevant to micro audiences through meaningful relationships and personalisation
- A smaller niche offering allows us to test products and pivot quickly in a changing industry



# What does this look like?

A pop-up shop concept within the PNA stores in East London and Gqeberha - to be further explored in the slide decks entitled "interior design" (see page 46).









## Why this approach?

- Pop-up stores offer an agile solution in a constantly changing landscape
- This dynamic concept allows Gussie's to rotate stock and move around displays strategically for seasonal sales, special offers, student discounts, etc. to provide our target audiences with a personalised shopping experience tailor-made for them
- Pop-up shops create new opportunities for exploration through exhibition-style displays
- Allows for experiential market testing with novelty products which can be refined to meet consumer's changing needs

- Promotes cross-selling of products between Gussie's and PNA
- Opportunity for PNA to showcase this PNA flagship premium store and benefit from the exposure and willingness to adopt innovative new ideas for a shifting retail landscape
- This model could potentially work for many more PNA stores
- There is an opportunity for PNA to become even more relevant to different interest markets or audiences within our nation





# Pop-up shops - the future of retail

- The future of retail is agile and experiential with in-store pop-up shops becoming the norm
- In-person retail needs to surprise consumers with exciting product offerings, fresh ideas, and new concepts
- Pop-ups, are better positioned to adapt quickly and will find it easier to move to, or augment their digital footprint
- Pop-ups of the future will need to respect COVID-19-related social distancing measures, while adapting to the new era of physical retail



- Implicit in the strategy of a pop-up is the physical manifestation of marketing execution, but also a digital campaign that integrates touchpoints across social, online, and traditional in-store channels
- Long-term, pop-up stores may become the dominant format of the physical retail environment. More brands will continue to embrace E-commerce channels while using specialised pop-ups for things like new product launches, promotional sales, and for creating exclusive experiences that are largely missing from traditional retail stores





# Key ideas for the future of retail and pop-up shops

- Tap into the rise of events and engaging brand spaces where people can book to attend exclusive workshops, classes or exhibitions
- Tap into localised opportunities by partnering with local influencers and artists (pop-up shops were originally more just for connection and marketing hype, but now we can create spaces with more meaning)
- Facilitate a better in-person and in-store experience



# Additional offerings to improve an in-store experience

- Internet café
- Printing facilities, with varied services (specialised printing for students – large format, etc.)
- Bespoke gifting and more importantly a gift packaging services (available nationwide through the use of E-commerce)
- Specialised art and arts and crafts equipment and supplies, i.e., The Deckle Edge
- High-end party supplies (beautiful supplies that are not readily available in smaller towns, i.e., Ginger Ray)



**High-end party supplies**



**PAMPER**  
*feelings*











**ROSE**  
*Twinkle*













FEELS  
LIKE A  
*party*





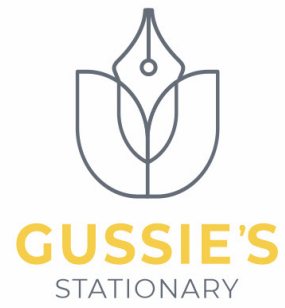


# **Product range**

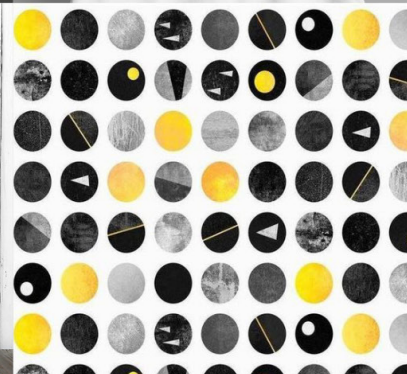
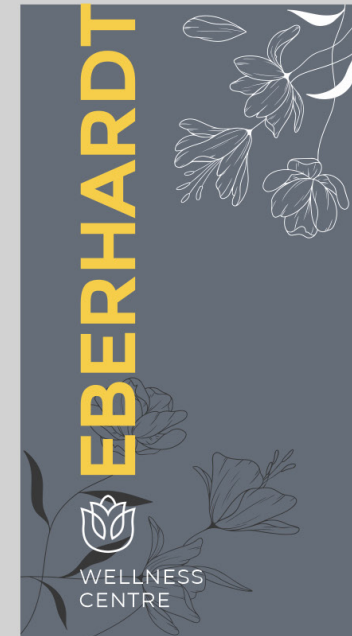


**GUSSIE'S**  
STATIONARY





**EBERHARDT**  
WELLNESS CENTRE







**Interior design**

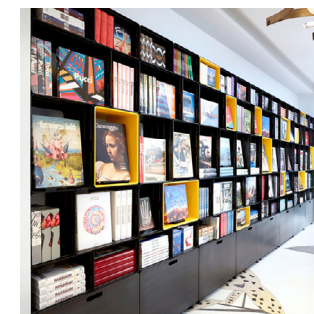
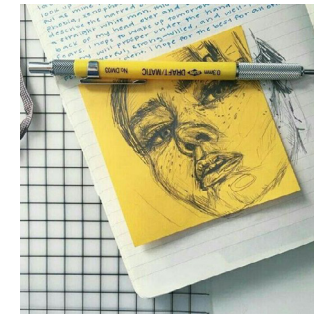
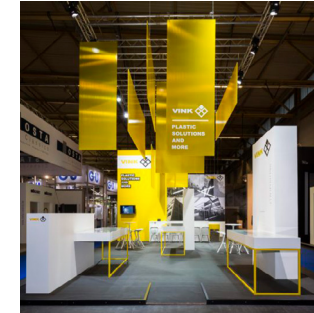


# Retail display and space

Exhibition style retail inspired by pop-up shop concept

## Exhibition style retail

The idea is to create an exhibition-style retail space for Gussie's within the PNA retail space. Focussing on seasonal and changeable displays, modular merchandise units, and visual connections to the surrounding space (PNA). The neutral colour scheme of grey, black, and white with accents of yellow and OSB timber panels. Using a minimalistic colour scheme allows the focus to be centred on the displayed artwork and art media. Visual transparency is created by grid-inspired structure and the use of translucent materials to allow the user to engage with surrounding elements.

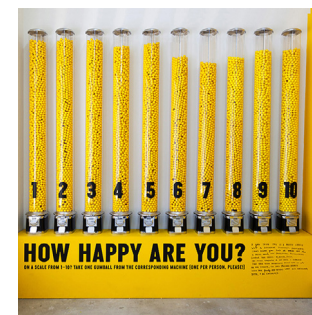
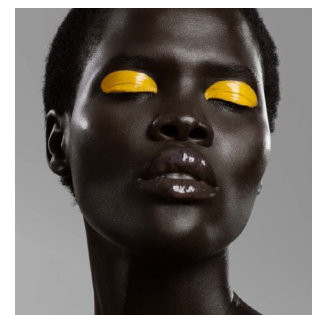
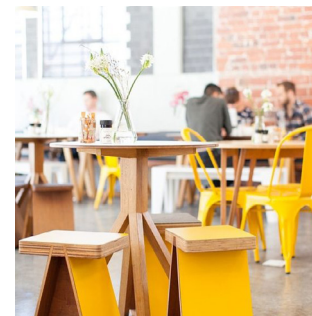
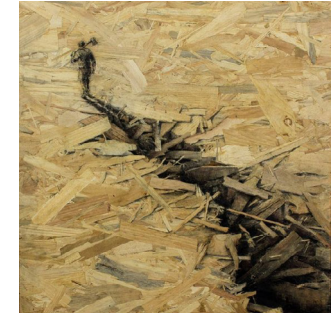


## Coffee bar

Creative gathering

### Coffee bar

The coffee bar is implemented to create a space for patrons to gather, socialise and enjoy a cup of coffee and treat while catching up with friends. Since the focus of Gussie's is to attract local creatives, the coffee bar could be implemented as a creative hub of sorts, or allow for informal art exhibition supporting space. The design mimics the open framework concept as per the retail component, adding comfortable seating and small tables to allow for a compact space. Panels of artwork are also introduced (attached to the framework) to showcase local artists, start a conversation and add to the art-inspired merchandise on display. The corporate colours are used more boldly here with the same materials and finishes used.



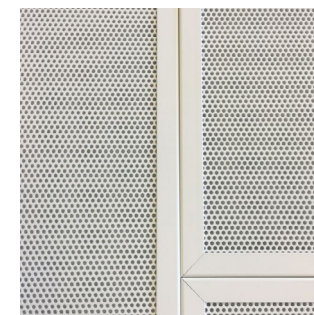
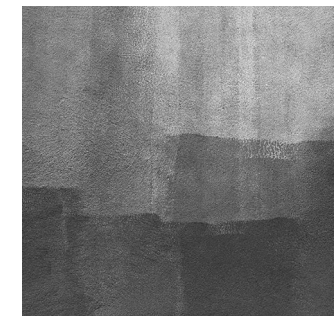
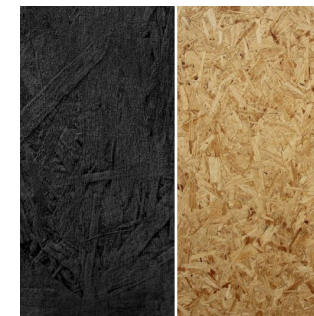
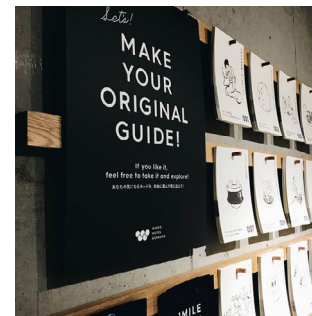


# Finishes and materials

## Colours and surfaces

### Finishes and materials

Finishes and materials are inspired by a youthful retail atmosphere. A neutral colour scheme of white, grey, and black is complemented by yellow accents to establish brand identity. The materials used are simplistic and contemporary to appeal to the youth market. Retail space to be created by mesh or metal framework, with various sized panels attached to the frame. These frames will be constructed from OSB (oriented strand board), perspex and MDF, and will be used to convey brand language and also showcase artwork and displays.

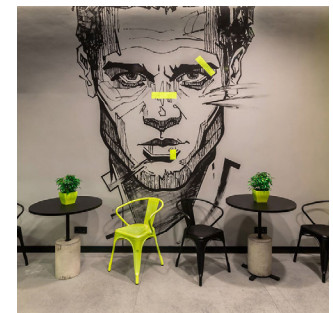
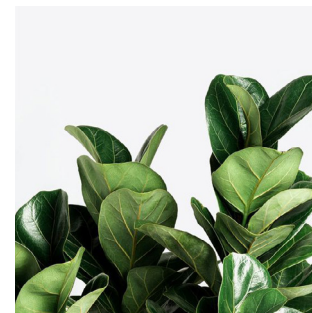
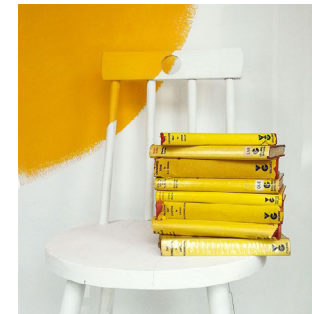
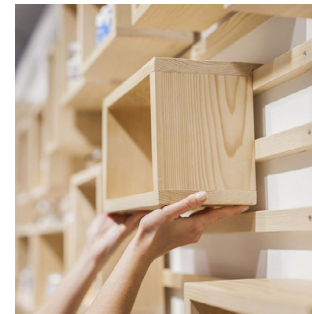


# Decor

Branding and decor

## Decor

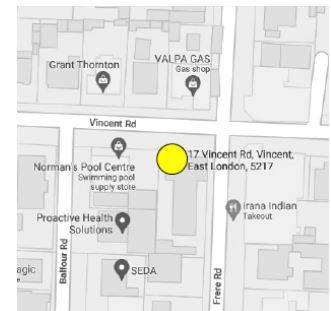
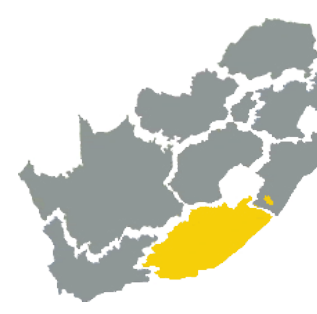
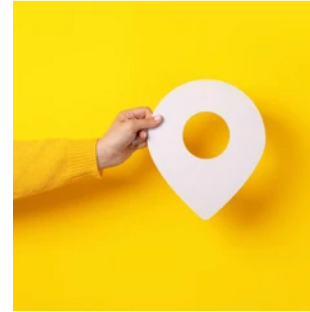
The decor is inspired by creative living. Greenery is introduced to create a calming feel along with bringing living elements into a retail space. Movable elements (gifting cart) become anchoring points within the open space. Neon lighting is added as accents to grab the attention of passers-by. Art is used as decor and will be changed according to seasons and themes.





## New location

17 Vincent Road  
Vincent  
East London  
5247  
Eastern Cape  
South Africa

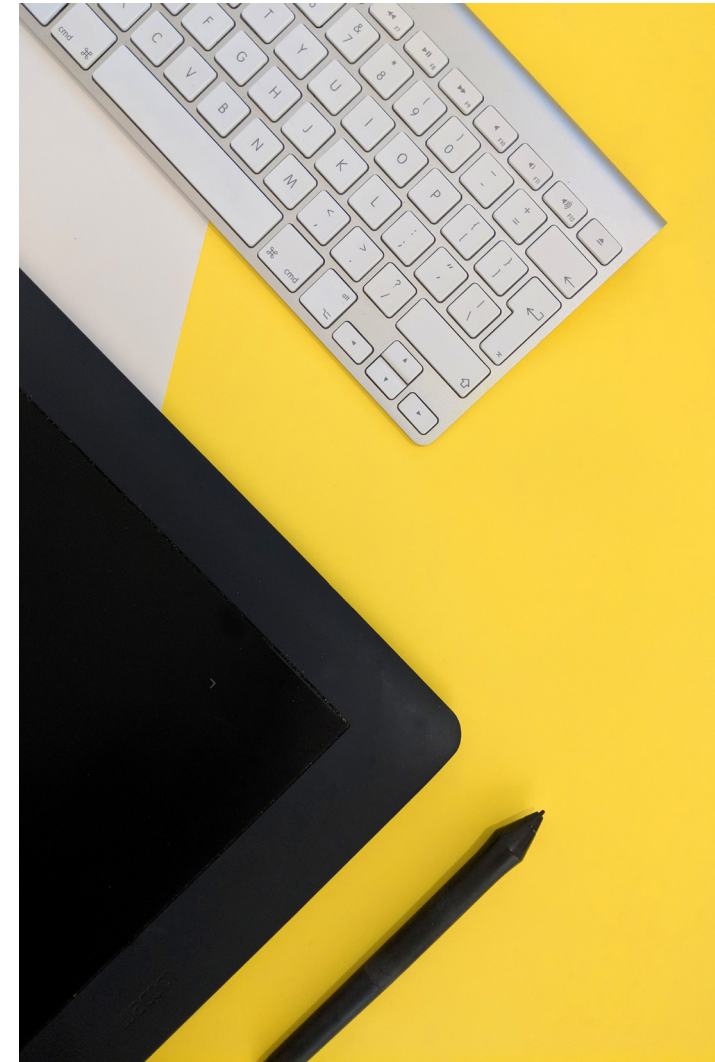




**Target market**

# Target market

- Moms and family-orientated community (business and school). Same offering, with a strong focus on creating an arts 'n crafts and coffee culture – tapping into the East London 'clique'.
- Student orientated. Delivering on the needs of the Nelson Mandela University stationery and art equipment market. At the moment, Nelson Mandela University has a monopoly. Printing and extended hours are another big need in Gqeberha and are another critical foot traffic driver. Gqeberha has one (1) printing shop that meets the needs of the student market: Total Print & Copy located inside Total Garage, 10 Admiralty Way, Summerstrand.





# Target market (East London)

- Two (2) main target markets have been identified for East London, as follows:

## 1. Moms

- Ages: 23-50
- School-going children ages: 5-17
- Lives or works in the suburbs: Beacon Bay, Berea, Bunkers Hill, Baysville, Nahoon, Selborne, Stirling, Vincent, Vincent Heights
- LSM 7-10: Middle class, upper-middle class, and wealthy consumers



### Demographics

**Age:** 32  
**Job:** Employed full-time  
**LSM:** 7  
**Family:** Married with children  
**Education:** Bachelor's degree  
**Archetype:** The Working Mom

### Goals

- Wants to satisfy her family's needs
- Wants a quick and easy solution to shopping (a one-stop-shop is best)
- Products must be affordable as she is budget-conscious
- Value for money is essential

### Bio

- Employed full-time
- Most of her income is allocated to lining expenses, with some disposable income leftover
- Busy, juggling responsibilities of work and home life
- Her family comes first, especially her children
- Runs the errands and plays the most important role in the purchase process for her family
- Most of her shopping is done in-store, though she does shop online from time to time
- Is likely to shop during lunch breaks, after work, or on weekends

### Frustrations

- Pressed for time
- Shopping on a budget

### Interests

Family, family-based activities, family-friendly recipes, craft ideas for the kids, pets, the beach, homemade items, locally-produced goods, gifts, kiddies party supplies



### Demographics

**Age:** 38  
**Job:** High-level government official  
**LSM:** 9  
**Family:** Married with children  
**Education:** Bachelor's degree  
**Archetype:** The Black Diamond

### Goals

- Wants a quality product, but at a fair price
- Only the best will do for her family
- Eager to please her children and meet their needs and wants
- High expectations of product quality and customer service

### Bio

- Financially secure with plenty of disposable income
- Has more free time to engage in her hobbies
- Plays an important role in the purchase process for her family
- Not as budget-conscious as the working mom but has the time to shop around
- Is an active online shopper
- Will likely shop in-store during the mornings after the school run or in the afternoons

### Frustrations

- Finding top quality products at a fair price
- Sourcing unique and extraordinary products in a smaller city so often turn to online stores

### Interests

Healthy eating, smoothies, yoga, gym, personal care products, family, fashion, gifts, weekend getaways, wine and dine, dinner parties, home decor, children's party decor

- Two (2) main target markets have been identified for East London, as follows:

## **2.Females**

- Ages: 21-60
- Lives or works in most suburbs, particularly the more upmarket areas of East London such as Baysville, Berea, Bunkers Hill, Nahoon, Selborne, Stirling, Vincent, and Vincent Heights
- LSM 8-10: Upper middle class to wealthy consumers





### Demographics

**Age:** 26  
**Job:** Part-time or self-employed  
**LSM:** 8  
**Family:** Single  
**Education:** Bachelor's degree  
**Archetype:** The Creator

### Goals

- Wants premium arts and crafts supplies
- Wants to engage with other like-minded individuals and creatives
- Would be interested in attending craft-based activities and events
- Wants to spend more time on her hobbies

### Bio

- Leads a relatively laid-back lifestyle, may work part-time, or is self-employed
- Highly interested in arts, crafts, or other outlets to express her creativity
- Interested in the bespoke and extraordinary
- Already engaged in one or more artsy hobbies
- Strongly believes in supporting local
- Inclined to support smaller businesses with a good brand story and focus on quality and adding value

### Frustrations

- Struggles to source premium arts and crafts supplies locally
- A lack of local arts and crafts activities and events

### Interests

Craft supplies, painting, drawing, art, DIY projects, journalling, easels, canvases, pottery, decoupage, thrifting, flea markets, food trucks, gardening, recycling



**Joanne**

### Demographics

**Age:** 44  
**Job:** Self-employed  
**LSM:** 10  
**Family:** Married with children  
**Education:** Bachelor's degree  
**Archetype:** The Social Butterfly

### Goals

- It's who you know AND what you know
- Maintaining her image and role amongst friends and family
- Appreciates high-quality products
- Will pay more for a top-quality product

### Bio

- Wealthy with established ties in the community
- Highly sociable
- Strong influence within her friend circle with whom she spends much of her free time
- An early adopter, aware of the latest trends
- Knows and actively recommends the best places, especially the hidden gems
- Proud to support local and is selective with the businesses she supports
- Does most of her shopping in-store, however, is familiar with shopping online

### Frustrations

- Sourcing unique and extraordinary products locally

### Interests

Family, friendship, shopping, hidden gems, social media, lunching, coffee, coffee shops, wine, air fryers, luxury cars, fashionable clothing, and accessories, home decor, and accessories

# Target market (Gqeberha)

- Two (2) main target markets have been identified for Gqeberha, as follows:

## 1. Moms

- Ages: 25-50
- School-going children ages: 5-18
- Lives or works in Humewood or Summerstrand, children attend schools in Summerstrand
- LSM 8-10: Upper middle class and wealthy consumers



**Sibahle**

### Demographics

**Age:** 36  
**Job:** Stay-at-home mom  
**LSM:** 9  
**Family:** Married with children  
**Education:** Bachelor's degree  
**Archetype:** The soccer mom

### Goals

- High expectations of product quality and customer service
- Wants a top-quality product at a fair price
- Eager to meet her family's needs and wants

### Bio

- Wealthy, stay-at-home mom
- Plenty of disposable income
- Has a close-knit family and friendship circle
- Leads a fairly busy lifestyle tending to her children's needs, school runs, and extramural activities
- Plays an important role in the purchase process for her family
- Actively shops online and supports local retail stores for convenience
- Wants to maintain her status and image amongst family and friends

### Frustrations

- Finding top quality products at a fair price
- Sourcing all the necessary products in Summerstrand so often turns to online stores or the bigger shopping malls in Gqeberha

### Interests

Family, friendship, family-based activities, personal care products, haircare, fashion, shoes, jewellery, gifts, entertaining, social media, weekend getaways, luxury cars, luxury home decor, and items for special celebrations



- Two (2) main target markets have been identified for Gqeberha, as follows:

## **2. Students**

- Ages: 18-24
- Male and female
- Studies at Nelson Mandela University campuses in Summerstrand, particularly studying in Visual Arts faculty: Graphic Design, Fashion, and Textile Design, Sculpture, Printmaking, Painting Ceramics, Photography, Architecture, Interior Design
- Family background (LSM 5-10): Lower middle class, middle class, upper class, and wealthy consumers



### Demographics

**Age:** 19  
**Job:** Part-time  
**LSM:** 7  
**Family:** Single  
**Education:** Architecture student  
**Archetype:** The student

### Goals

- Needs to make his monthly budget stretch as far as possible
- Needs to source good quality study materials at a good price
- Interested in great deals and bargains

### Bio

- Comes from stable family background, family lives out of town
- Resides in a rented out apartment close to the university
- Works part-time or is fully financially supported by his family
- Shops at local retail stores, preferably those nearby for convenience as well as those offering value for money
- Shops online and via social media platforms such as Facebook Marketplace when local availability is scarce
- Wants to make a success of his studies

### Frustrations

- Lack of disposable income coupled with the high cost of study materials
- Lack of immediate access to all the necessary materials for his studies may have to drive to other suburbs or shop online to source his requirements

### Interests

Friendship, sports, braais, the beach, road trips, car culture, local music and artists, DIY projects, eyewear, clothing, shoes, gadgets, video games, books

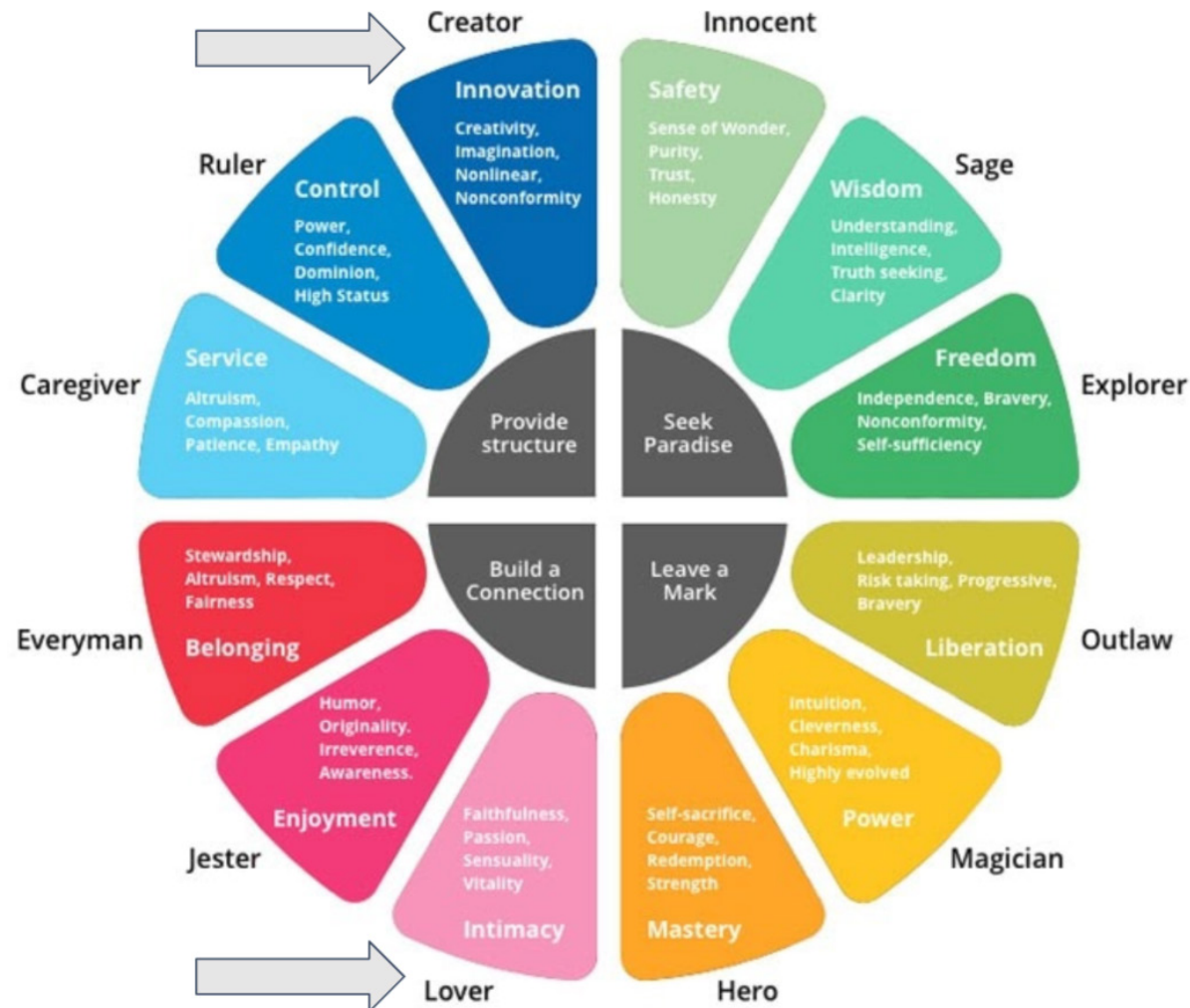


**Brand**

Russie's



# Brand archetype and personality



# "The Creator" as a brand

"Creator" archetypes are out-of-the-box thinkers that foster creativity and innovation. As a brand, "Creators" seek to create something new from nothing, or from something that is dated, injecting fresh ideas and new experiences into their product or service offerings. They are non-conformists that push the boundaries on the conventional, to excite and delight consumers with the unordinary.

# "The Lover" as a brand

"Lover" archetypes put people first, creating partnerships and relationships that are meaningful and spark you. As a brand, "Lovers" invoke positivity and feel-good moments to create strong emotional responses and connections in their customers. They value authenticity and are passionate in their pursuit of meaning and purpose.

# Brand personality

- The Creator - surprise and delight consumers and bring to life new ideas by encouraging creative expression
- The Lover - foster meaningful relationships and connection to impact the community (and world) for good



# Brand personality: Key traits

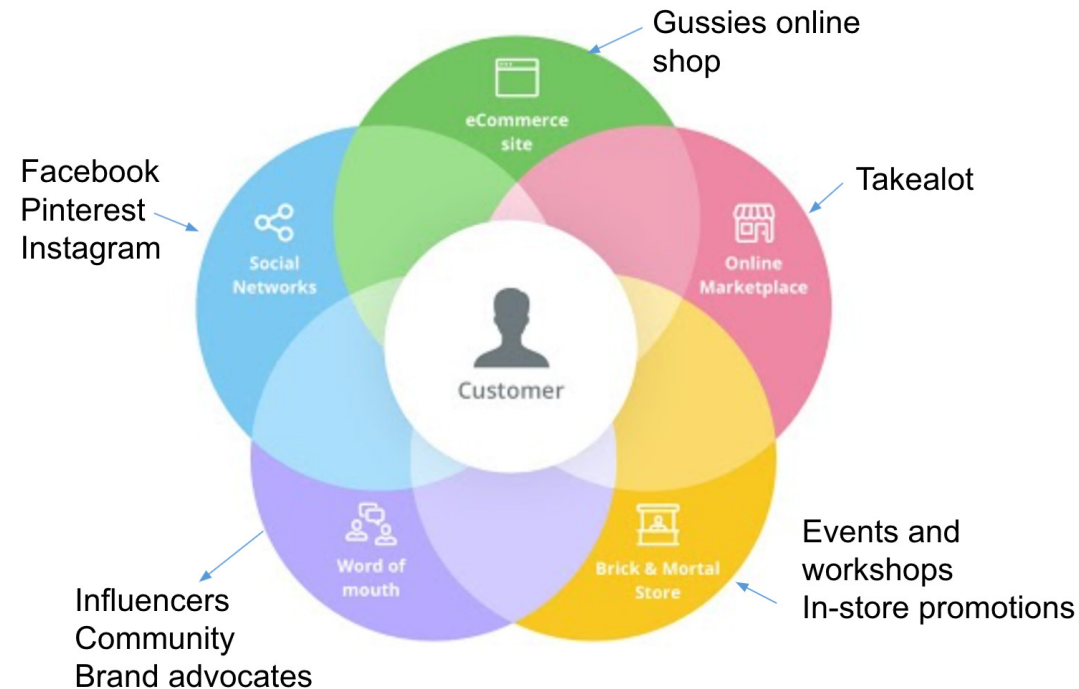


# Brand narrative

At Gussie's, our heart is for people. We want to surprise and delight our consumers. We aim to facilitate creative expression by giving people the tools and space to share their ideas with the world. We believe that meaningful relationships with our communities create a better tomorrow and allow us to impact the world for good. Together, we can make life more beautiful.

# How will we engage our consumers?

Omnichannel marketing strategy:





# **Summary of proposal**



# Summary of proposal

- We believe that this partnership will provide us with the opportunity to drive sales and adapt to new consumer demands in a changing landscape
- A PNA and Gussie's partnership will pave the way for a shifting retail market, and as early adopters, we can only stand to benefit and give our customers an experiential offering that will spark you
- Beyond this, a PNA and Gussie's partnership will enable us to impact the community for good through the Gussie Eberhardt Foundation and make a meaningful contribution to the people of the Eastern Cape and South Africa

- The opportunity for growth with a flagship, premium PNA store throughout South Africa can be tested in our East London and Gqeberha stores, before rolling out nationally
- We believe that our community-centred approach is a first of its kind for our market and making ourselves relevant to the people who shop with us create an enduring brand that can quickly adapt through changing times

Innovation is taking two things  
that already exist and putting  
them together in a new way.

—

**Tom Freston**



**Thank you**