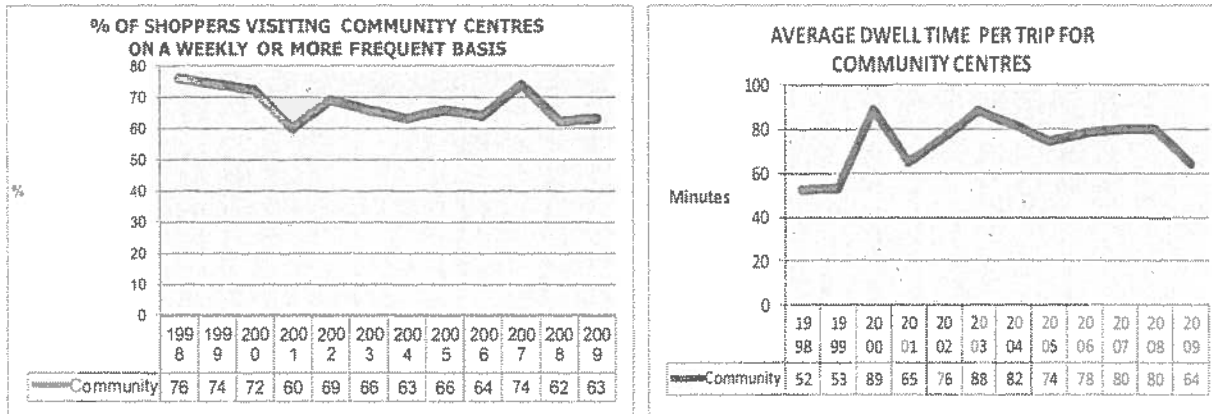


### Benchmark indicators



Between 60% and 70% of the customers of these centres visit these centres on at least a weekly basis with an average dwell time of between 60-80 minutes.

### Tenant mix

- **Anchor tenant:** Large supermarket bigger than 2 500m<sup>2</sup> with the typical tenants being Spar, Pick n Pay Family Store, Pick n Pay, OK Food and Shoprite/Checkers (or combined with a Woolworths Food store);
- Convenience retailers including a pharmacy, butchery, video store, hairdresser, dry cleaner, liquor store and a hardware store;
- National clothing stores (to a limited extent), boutiques, shoes and some comparative shopping;
- Restaurants and takeaways;
- Services like medical facilities, banking and limited office functions;
- Some might have cinemas. In a few of these size centres, cinemas closed because of smaller trades areas.

### Trends and changes

Many of the existing community centres have become dated. In many cases developers and owners were successful in **revitalising, upgrading** and **re-tenanting** these centres to fulfil a convenience/community role.

One of the major trends in township development is to offer centres of this nature. The tenant mix is mainly focusing on food, clothing, furniture and services. These size centres are currently the most successful in the township areas ( $\pm 17\ 000\text{m}^2$  -  $25\ 000\text{m}^2$ ).

### Actions to guide retail development

The potential for this type of development will mainly be in three different areas, namely:

- **infill** developments where enough potential exist;
- **new growth** areas and a '**follow the roofs**' strategy;
- the **redevelopment** of existing centres, because of the older nature of existing community centres;
- expansion of the tenant mix and the floor area of **existing centres** to offer a wide tenant mix and
- expansion of large neighbourhood centres where sufficient potential exists for the development of community centres.



KaraGlen centre in Edenvale.



Village Mall, Hartebeespoortdam:  
This centre caters for local residents  
as well as weekenders and day  
visitors.



Randridge Mall in Johannesburg:  
Growing larger in spite of very strong  
competition.

### Example

- Rustenburg Plaza, Rustenburg
- Goodwood Mall, Cape Town
- Scottsville Mall, Pietermaritzburg
- Lynnridge mall, Pretoria
- Village Mall, Hartbeespoortdam
- New Redruth Centre, Alberton
- Lonehill Centre, Sandton
- Howard Centre, Cape Town
- Gezina Galleries, Pretoria

### 3.4 Small Regional Centres/Large Community Centres

#### Role and function

The role and function of these types of centres are mainly to satisfy the needs of the broader community and to offer a better tenant mix than the community centres. Most of these centres **do not** necessarily fulfil a true regional role, but rather that of a larger community facility.

Some of these centres can also address the needs of a specific **market segment**. Many new centres in this size category have opened during the last 4-6 years. The tenant mix is wider and competes on both ends against community and regional centres. In some cases, especially in the more rural areas, these centres fulfil a much stronger regional role.

#### Description

This retail facility offers a **wide variety of stores** and is bigger than a community centre, at a better location, with a wider tenant mix but **not yet in the category** of a regional centre.

Such a centre could be a large community centre according to the definition, but due to its role and function in the area, it could be regarded as a **small regional centre**. These centres can also fulfil a regional role in more rural areas.

#### Size

| Size of centre (m <sup>2</sup> )<br>(GLA) | Number of stores | Size of land (ha) |
|---|------------------|-------------------|
| 25 000-50 000                             | 75-150           | 7.5-15            |

#### Location criteria

Good regional accessibility and the site must offer high visibility to passing traffic and easy accessibility to the residents in the community/region.

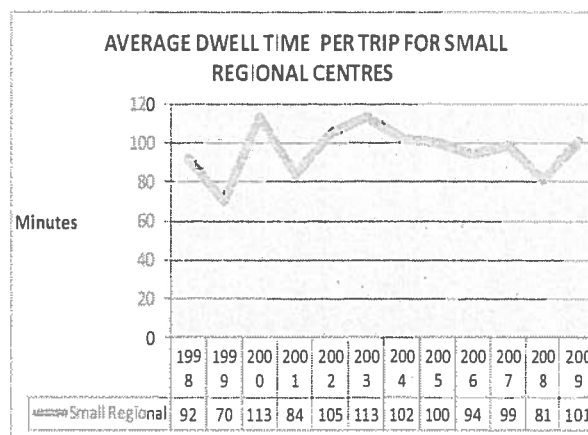
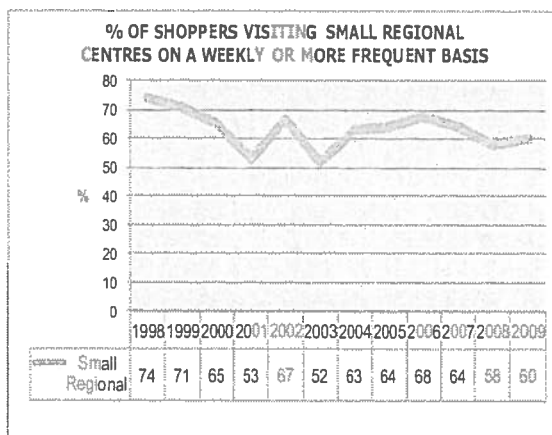
| Average radius of primary trade area | Median travel time to the centre | Access requirements                               |
|--------------------------------------|----------------------------------|---|
| 3-5km                                | 10-16min                         | Major suburban arterial road linking to a highway |

### Market characteristics and threshold values

For a successful small regional centre the following threshold values and market support are required:

| Socio-economic groups | Number of households |         |         | Population (25% market share) | Retail space in m <sup>2</sup> per capita |
|-----------------------|----------------------|---------|---------|-------------------------------|---|
|                       | 35%                  | 25%     | 15%     |                               |   |
| LSM 1-5               | 89 375               | 125 000 | 208 438 | 562 500                       | <0.1                                      |
| LSM 6-9               | 39 722               | 55 556  | 92 639  | 222 224                       | 0.2                                       |
| LSM 10-10+            | 16 250               | 22 727  | 37 898  | 79 545                        | 0.54                                      |

### Benchmark indicators



Between 60%-65% of their customers visit these centres on a weekly basis and normally stay for  $\pm$  95 minutes.

### Tenant mix

- **Anchor Tenant:** Large supermarket (> $\pm$ 4 000m<sup>2</sup>) with the typical tenants being Pick n Pay and Shoprite/Checkers (up to two food anchors can be on offer in one centre, but only in exceptional cases);
- convenience retailers;
- major national clothing anchor stores like Edgars, Woolworths and Mr Price, boutiques, shoe shops and some comparative shopping;
- restaurants and takeaways;
- entertainment such as cinemas, although a number of cinemas have closed in smaller size centres and
- services, such as medical and banking facilities as well as limited office functions.

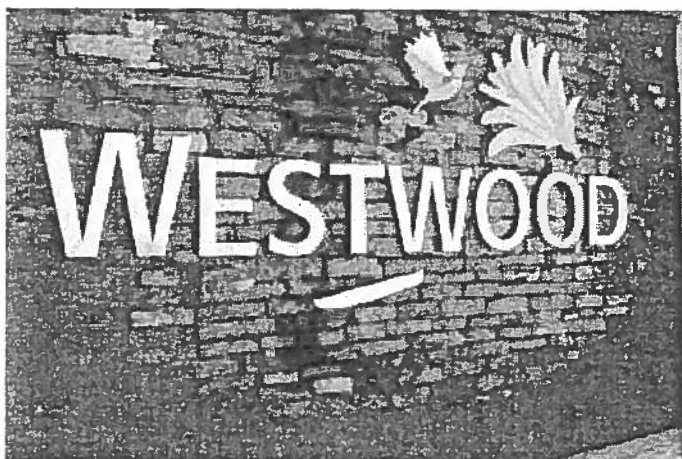
The focus of the tenant mix is on **comparative shopping** in clothing and household items.

### Trends and changes

In most cases, these centres fulfil the needs of the community as well as that of a wider catchment area, based on a variety of different stores. In some cases, community centres could move into this category based on a wider tenant mix offering.

### Actions to guide retail development

- The main emphasis will be on **new growth areas**. Provision should be made for small regional centres to expand over time. These facilities will initially act as a **catalyst** for further retail and other development. Depending on the area, provision should be made for office development and other additional types of retail facilities.
- In the case of existing community centres, **expansion** must be allowed to cater for a better tenant mix, existing stores to expand (internal growth) and to offer more eating facilities and new retail concepts.
- **Infill** developments should be allowed.



Westwood Mall, Durban: A new centre overlapping with the trade area of large super regional centre, The Pavilion.



La Lucia Mall, Durban: A strong localised centre in competition with the larger super regional centre, Gateway.



Wonderboom Junction in Pretoria: A new so called small regional centre but mainly acting as a community centre in that area of Pretoria.

### Examples

- South Coast Mall, Port Shepstone/Margate
- Mall @ Carnival, Brakpan
- Irene Village Mall, Pretoria
- Walmer Park, Port Elizabeth
- Westwood Mall, Durban
- Paarl Mall, Paarl

## 3.5 Regional Centres

### Role and function

The role and function of these centres are to satisfy the needs of a **large primary and secondary** catchment area. The support from the tertiary trade area usually varies between 8% and 10%. These centres are often supported by a strong **workforce** in the immediate vicinity. They offer a **wider entertainment** component to attract people especially during the evenings and children during holiday periods.

These centres also act as a catalyst for the establishment of a **mixed use node** with retail facilities, office firms, hotels, residential development and entertainment. These areas then develop into strong nodal areas.

### Description

This is a **large retail facility** offering a wide variety of stores, sufficient parking facilities and a significant entertainment component.

**Size**

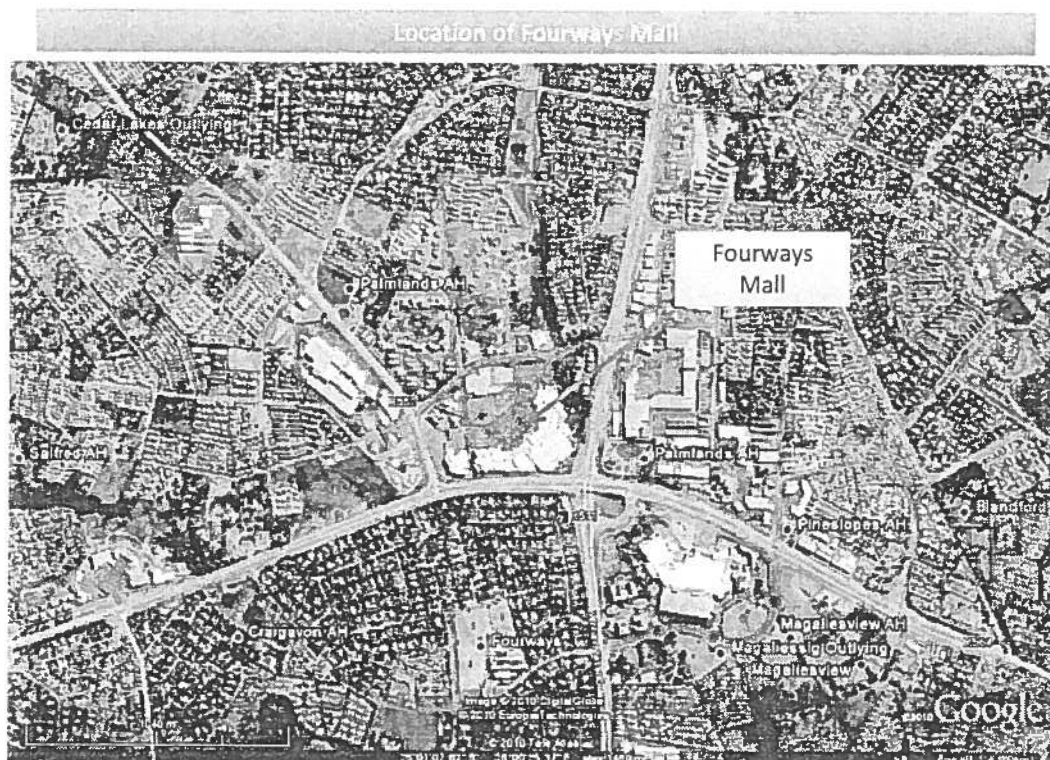
| Size of centre (m <sup>2</sup> )<br>(GLA) | Number of stores | Size of land (ha) |
|---|------------------|-------------------|
| 50 000-100 000                            | 150-250          | 15+               |

**Location criteria**

A major arterial road, usually a provincial road linked to a national road offering very high accessibility and visibility. Provision should be made for enough vehicle stacking space from the highway to prevent queuing and traffic obstructions.

| Average radius of primary trade areas | Median travel time to the centre | Access requirements  |
|---------------------------------------|----------------------------------|--|
| 5-8km                                 | 14-20min                         | Major arterial road usually a provincial road linking to a national road |

The Galleria in Amanzimtoti is one of the latest regional centres completed at the end of 2009 with a GLA of 88 000m<sup>2</sup>. Main tenants are Checkers Hyper, Game and Nu Metro. Highway road access is of critical importance. This is an example of a new centre that has the size of a regional centre.

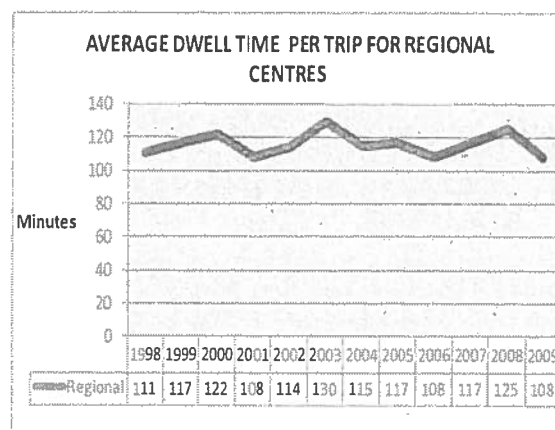
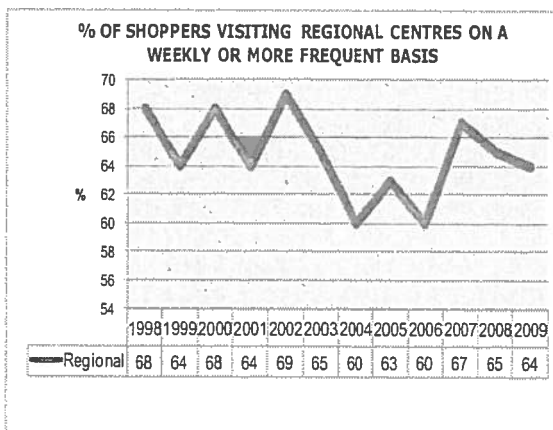


### Market characteristics and threshold values

For a successful regional centre, the following threshold values and market support are required:

| LSM groups | Number of households |         |         | Population<br>(25% market share) | Retail space in m <sup>2</sup> per capita |
|------------|----------------------|---------|---------|----------------------------------|---|
|            | 35%                  | 25%     | 15%     |                                  |   |
| LSM 1-5    | 180 000              | 250 000 | 417 000 | 1 125 000                        | <0.1                                      |
| LSM 6-9    | 80 000               | 111 000 | 185 000 | 450 000                          | 0.2                                       |
| LSM 10-10+ | 33 000               | 45 000  | 76 000  | 160 000                          | 0.54                                      |

### Benchmark indicators



The weekly support fluctuates between 60% and 65% weekly support with an average dwell time of just under 2 hours.

### Tenant mix

- **Anchor tenant:** In many cases, two large supermarkets (larger than ± 3 500m<sup>2</sup>) or one large supermarket of 8 000m<sup>2</sup> with the typical tenants being Pick n Pay or Pick n Pay Hypermarket, Shoprite/Checkers, or Checkers Hyper;
- convenience retailers;
- clothing anchor stores such as Edgars, Woolworths, Mr Price, Foschini and Truworths;
- boutiques, shoe stores and some comparative shopping;
- restaurants and food court areas;
- entertainment such as cinemas, electronic games/game arcades and
- other services such as medical facilities, banking, cell phone service centres and office functions.

The focus of the tenant mix is on **comparative** and **destination** shopping in especially clothing and household items.

### Trends and changes

The most important trends and changes in this regard are that almost **all** regional centres countrywide have been expanded during the last 10 years. Based on their success and the retail offering, these centres will continue changing up to a certain point where it becomes difficult for customers to move around, park and fulfil their shopping needs. **Growth** in these centres is mainly a result of internal expansion of existing retailers, new retail concepts and more retailers likely to enter a particular market.

### Action to guide retail development

- New developments should mainly focus on **high growth areas** where sufficient demand exists. **'Follow-the-roofs'** strategy is very important in this case. Sufficient growth must have taken place before a regional centre could be established in any area.
- Allow the **expansion** of existing small regional centres and regional centres to cater for increased demand. These centres will also develop into first and second order nodes and provision should be made for additional retail facilities, as well as office development in specific areas.



The Glen Shopping centre in Oakdene Johannesburg.