the strongest/largest retail offering. The CBD consists of planned, unplanned or incremental retail types that developed over many years.

The hierarchy of shopping facilities on the lowest levels of the whole spectrum of rural villages and urban settlements has received no or very little attention in the past. The town centre forms the basis of each tier of retail representation as part of this unplanned and incremental development of retail facilities.

5.1 CBD/Town Centres

Role and function

CBDs in South Africa fulfil a city-wide destination for mainly township residents. The CBDs are also the focus point of public transport and the destination for the majority of workers in our metropolitan areas. The CBDs also offer a very wide range of retail facilities, entertainment, browsing and opportunity to socialise. Most CBDs have a very strong support base and good retail performances.

On town level, the town centre fulfils a similar role catering for all town residents, as well as the farm/rural population. The function of retail in these towns has changed dramatically because of new labour laws. Town centres have become very important shopping destinations, especially over weekends.

Description

CBD shopping facilities form part of street retailing and cater for the nearby residents, but mostly for the people moving in and out of the CBD on a daily basis. In recent years, the consumer base for CBD/Town Centres retailing has been dominated by lower LSM profiles. Most CBDs also have shopping centres as part of the total retail mix, but operate within the broader CBD context. Many of these centres are located close to the taxi /station facilities.

Size

Size of Centre (m^2)	Number of stores
10 000 - ±200 000	Depend on the size of the city/town/metropolitan area

Market characteristics and threshold values

These centres are dependent on a large number of pedestrians coming to the area either to shop or to work. The outstanding characteristic is the dependence on public transport.

Tenant mix

A wide range of tenants can be seen in CBD/Town Centres, including the following:

- large national clothing stores
- furniture stores

- homeware stores
- fast food restaurants
- supermarkets
- cell phone shops/service centres
- banking facilities and
- lower quality clothing, furniture and other stores (mainly independent traders).

Trends and changes

The most important trend is the establishment of a very strong retail component, focusing mainly on the needs of LSM 1-7 shoppers. More focus has been placed on the revitalisation and redevelopment of CBDs lately. Cities like Cape Town have been very successful in creating an attractive living environment for more affluent households. Other metropolitan areas, like Durban, Johannesburg and Pretoria are also following this trend; however, the residential facilities in the CBD areas are of middle market standard.

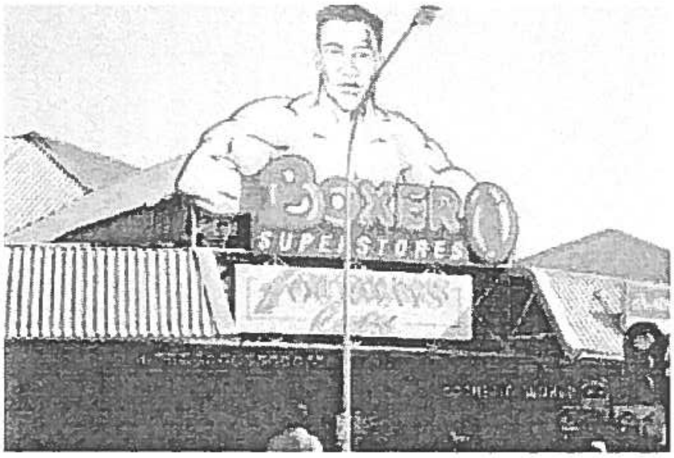
There is a major need to upgrade the CBD/Town Centre facilities and to make sure that these facilities remain attractive for mainly the commuter, office and local resident market. CBDs also experience major competition from centres in the townships. The upgrade of retail facilities in the CBD of Johannesburg focused on more and better fashion stores as well as new coffee shops.

Actions to guide CBD/Town Centre redevelopment

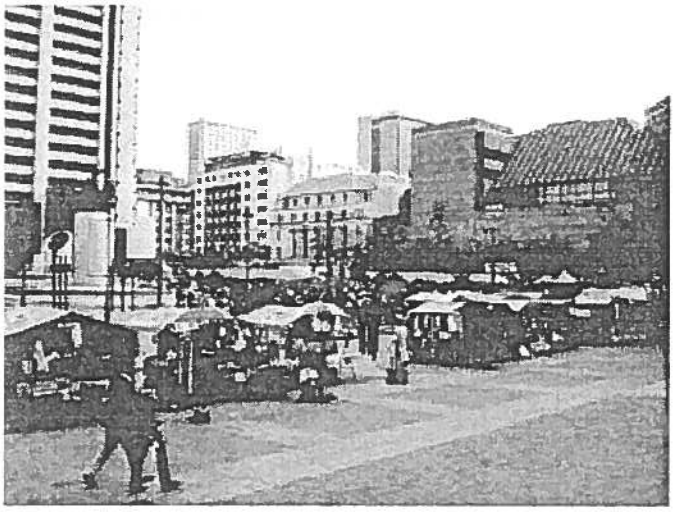
The focus should be on core areas, major streets and destinations en route to stations and taxi ranks. Poorly located retail facilities will become vacant, rundown and redundant. New retail facilities will mainly develop as upgraded and revitalised existing structures.

Safety and security play a major role in these developments, as well as the revitalisation of the entire CBD. Development guidelines will also have to include the rest of CBD activities, e.g. office development and redevelopment, pedestrian flows, secure areas and attractive environment.

CBD of Durban



The Boxer Superstore in Ladysmith



Informal traders adjacent to Sammy Marks Square, Pretoria

5.2 Taxi Rank Retail/Commuter Centres

Role and function

The role and function of retail facilities at a transport break point are to provide variety retail products for large volumes of commuters using this particular precinct. The precinct usually includes a railway station, taxi and bus ranking facilities. The retail varies from formal shopping centres to informal traders all focusing on arriving and departing commuters.

Description

The outstanding aspect in the case of taxi/commuter centres is the high pedestrian volumes throughout the day. The commuters using these transport breakpoint facilities usually do so because of two reasons namely:

- to connect to other transport facilities or to change routes and
- to work or shop in the area.

During these two actions, the shopping facilities are being used as express convenience or as a destination trip to buy specific products from the surrounding retail facilities.

Size

Size of centre (m^2) (GLA)	Number of stores
1 000-15 000	5-50

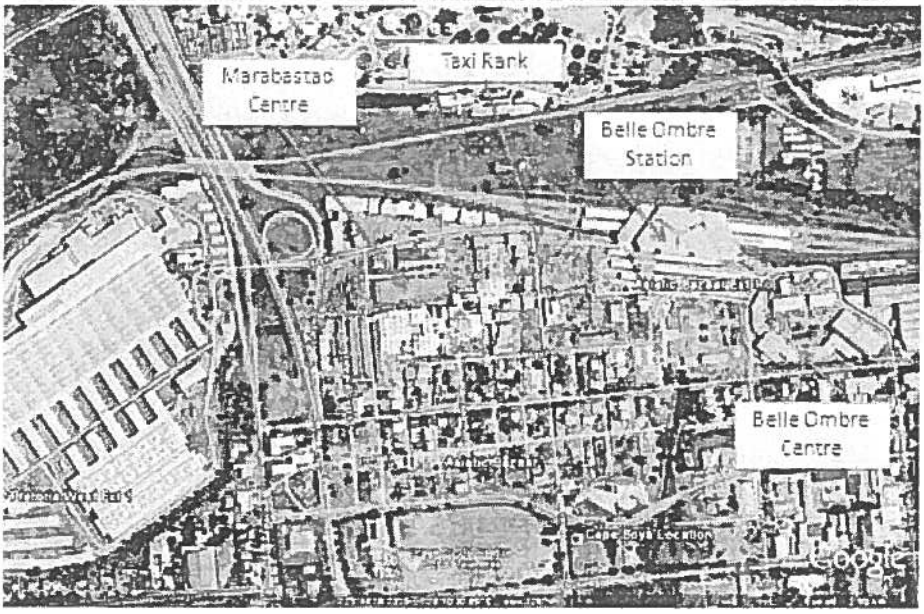
Market characteristics and threshold values

The commuter volumes using different stations vary from 20 000 to 30 000 people per day. The key aspect is to ensure that the layout of the centre is such that pedestrians **walk through** the centre and **do not bypass** the retail facilities.

Location criteria

It is of utmost importance that any retail facility planned at the taxi rank/stations is placed in such a way that it attracts pedestrians through the centre. The micro location in this regard becomes of utmost importance. Should a centre be built in the opposite direction from the normal pedestrian flow patterns, the centre will be missed and will become less attractive and not successful. The positioning of the centre must therefore maximise the through flow of pedestrians.

Location of Taxi Rank and Commuter retail in Pretoria



Tenant mix

A wide range of tenants can be seen in taxi/commuter centres, including the following:

- large national clothing stores
- homeware stores like Jet Mart and Diskom
- fast-food restaurants
- supermarkets
- cell phone shops/service centres and
- ATM facilities

Trends and changes

These centres have become very popular over the years and more and more of these centres were developed.

Actions to guide taxi/commuter centre redevelopment

The potential for a shopping centre at this particular location will very much depend on train, bus and taxi commuter volumes.

The most important guidelines are:

- to be aware of pedestrian volumes using the precinct on a daily basis;
- to establish whether these volumes will be of a permanent basis and
- to make sure that the centre is build to maximise the through flow of traffic.

Taxi/commuter centre development will mainly happen as part of the following:

- CBD/Town Centre redevelopment
- New taxi ranks and railway stations

Taxi rank in Mshwati

Bus station in Gaborone, Botswana

5.3 Flea Markets/Informal Trade

In this regard a distinction is drawn between formally organised markets and spontaneous informal traders. The former is located and run from a **built structure** on a permanent basis. The informal traders do not occupy formal retail space and could move around during one particular day e.g. exposing their products for the commuters arriving along one particular street during the morning, and along another street for the commuters leaving the area in the afternoon.

Role and function

The main function is to provide **convenience** or **speciality** products from fixed or non-fixed premises. They also form part of subsistence economies in specific areas within cities/towns/rural areas.

Description

Distinguish between formal flea markets based on a fixed time and location at a permanent rented stand and informal trade which is something different with many product categories, no fixed operating hours or location, and no formal lease agreement exist.

Size

The informal trading space ranges from a few square meters up to ±50m². The stalls as part of a formal flea market also vary according to the same size categories and the whole offering varies based on the total volume of pedestrians/commuters. There is no fixed size and will depend on volumes, climatic conditions as well as tastes and preferences of the commuters.

Location criteria

Informal traders are dependent on large and regular volumes of passing pedestrian/vehicle traffic. These facilities are footloose (not at a fixed location) and will move to where pedestrians are.

Market characteristics and threshold values

The success of the informal traders is totally dependent on high passing pedestrian volumes.

Tenant mix

A variety of products are sold, including:

- food
- clothing and shoes
- fruit and vegetables
- electronic equipment and cell phones
- cigarettes and
- music and DVDs

Competition sometimes exists in the same area (within meters of each other).

The typical formal flea market offers similar products, but of better quality.

Trends and changes

Informal trade will continue to exist, especially at good locations, as well as in CBD areas where high traffic or pedestrian volumes are present. It forms part of the township/taxi ranks/commuter shopping facilities where large numbers of people gather on a regular basis.

Actions to guide informal trade/flea markets development

Potential of these facilities will mainly depend on the location and type of adjacent facilities.

In many cases, the informal sector within the CBD areas creates problems associated with dirtiness. A specific policy must be in place with regard to informal traders. As far as formal flea markets are concerned, the potential will mainly be determined by the product, the awareness of these facilities and the offering of unique product categories.

Informal traders on street in Gaborone

Informal offering near Umlazi, Durban

5.4 Spaza Shops

Role and function

The function of Spaza shops should be regarded as part of the **informal** trade sector. In many cases this also forms part of the subsistence economic base. The function is merely to collect an extra income and to offer express convenience facilities to the immediate vicinity in poorer townships and suburban areas.

Description

The Spaza shop forms part of the dwelling unit or an outbuilding on a residential stand. This is an informal retail facility that first developed in the townships as a result of the lack of formal retail facilities in the area. Some of these stores are now also opening in the suburbs.

The premises consist mainly of a converted garage, a room in the house or small separate structure on the yard or on the pavement.

Size

The size of these stores is usually smaller than 50m², and in exceptional cases will be up to ±100m².

Location criteria

These stores can be found **anywhere** in a township or residential area, and although a location with high visibility is usually required, this is not always the case. These facilities usually cater for surrounding households ranging from **100 to 300 meters** away, depending on the nature of the area and the level of competition.

Market characteristics and threshold value

These Spaza shops are mainly found in **low and middle low socio economic areas**. No specific market related guidelines exist in this regard. The opening of stores is mainly driven by entrepreneurship.

Product mix

A typical Spaza shop provides mainly convenience grocery goods needed on a day to day basis (similar to a garage store, but on a **smaller** basis). Liquor is sold from the taverns, in most cases without the necessary licenses.

Trends and changes

The reasons for existence of this type of facility are mainly twofold namely:

- the lack of convenient grocery shopping facilities in the area or,
- economic conditions where a household decides to open a small store to earn an income.

This is regarded as temporary phenomena strongly associated with poor economic conditions prevailing at a specific time.

Over the last 10 years Spaza shops have shown major growth in especially the township areas. This function will keep on providing in the needs of the express convenience market. More formal local, neighbourhood and community centres are currently being built in the township areas, which will have an impact on the Spaza shops. These Spaza shops satisfy a very specific need in the immediate vicinity of the household and will continue operating. They satisfy a very specific express convenience role. Therefore, the impact of formal community and regional centres occurs on a totally different level of the hierarchy of shopping facilities. It should not be protected by legislation and free market principals will determine the future of each individual Spaza shop.

The future and success of these Spaza shops are mainly owner driven, and will depend on the product range and the close proximity to customers in the immediate vicinity.

Botshabelo, Spaza Shop

6. RURAL RETAIL DEVELOPMENT

This is included as a **separate** section. Retail development in the rural areas is unplanned in most cases, while lately the emphasis has been on the development of planned shopping centres. The type and size of the development will depend on the location of the rural town/village, as well as the attraction of larger towns and cities. Most of the developments can also be described as incremental developments.

The development history of rural retail development has its roots in the former homeland policies where a number of smaller settlements were established as towns and places of economic decentralisation.

Examples of weak retail centres are Kanyamazane near Nelspruit, Phokeng and Thlabane near Rustenburg and Elim near Makhado, all located too close to the bigger towns. Retail in Giyani, located 120 km from Tzaneen, 150 km from Polokwane and 70km from Thohoyandou is an example of much stronger rural retail developments. Queenstown, Burgersfort, Lephalale, Umtata and QuaQua are all good examples of how distance from other retail developments have a major attraction to local shoppers

The whole hierarchy of shopping centre facilities is mainly applicable on all the appropriate levels/tiers in metropolitan areas, while only **one or two** planned retail types can be justified in rural areas. See Diagram 2.2. The required threshold values for large planned shopping centres are not achieved, and in most cases the largest facilities are in the **order of a community centre**. The rest of the retail forms part of the town/village centre occupied in small single free standing buildings on 2 or 3 tiers of the retail hierarchy.

Role and function

Rural retail development will mainly depend on the location and the total number of people living within the broader catchment area, transport to the rural node/town, and the level of competition, the existing facilities and most importantly, the income of these households. Apart from the traditional town centre a number of community size centres have developed in the larger town/smaller cities lately.

Retail in these areas is usually very strong because of the very large trade areas. These trade areas normally coincide with the **sphere of influence** of a particular town which is influenced by schools, hospitals and other community facilities.

Description

These types of centres are in most cases built according to the profile and needs of the local residents. It is a very dynamic and challenging area for retail development. With rising affluence and economic decentralisation incentives into the future, a great opportunity arises as urban townships reach an oversupply status.

Size

Rural centres mainly vary in size between 5 000m² and 30 000m². The size of the centres ranges from neighbourhood centres to large community/small regional centres. The size of the centre will depend on the threshold population within the town as well as the sub region. The town's sphere of influence will play a major role in this regard.

Location criteria

The most important location criterion for rural retail development, is to establish itself in the main town/rural community close to taxi facilities and the main road running through the village or town. Distance to major towns plays a very important role in the success of retail facilities in these areas.

Market characteristics and threshold values

For a successful rural centre, the following threshold value and market support is required:

LSM groups	Households	Population
LSM 1-5	20 000-210 000	100 000-560 000

Very large numbers of households are required to warrant retail development. The emphasis is on the town centre with a number of small buildings on street level. Lately community size centres have developed in most of the larger rural communities.

Tenant mix

The tenant mix of these centres would usually comprise of food, clothing, furniture and services.

Trends and changes

A number of these centres were built during the last 5 years. Centres in the size range of 16000m² – 22000m² are very popular. The households supporting these centres are in many cases dependent on money provided by family residing and working in the metropolitan areas.

Actions to guide rural retail development

The number of households and level of income are of critical importance. The centre must be very close to the main taxi rank for the area. It can be expected that the outflow to the larger city areas will continue.

Examples

Kopanong Centre, Hammanskraal. A very busy and successful centre as part of the fringe between urban townships and rural development

Moratiwa Crossing, near Nebo

SUMMARY TABLE: CLASSIFICATION AND HIERARCHY OF RETAIL FACILITIES IN SOUTH AFRICA

Type of Centre	Size of centre (m^2)(GLA)	Trade area	Access Requirements	No. of households	Population	Socio-economic groups	Ave Radius (km)	Median Travel time (minutes)	Main tenants
				CORE CLASSIFICATIONS					
Small free standing and convenience centre	500 – 5 000 5-25 stores	Serves part of a suburb	Suburban street	LSM 1-5, (<10 000) LSM 6-9, (<4 500) LSM 10-10+, (<2 000)	<40 000 <15 000 <7 000	All LSM groups	1 – 1.5	<3	• Café/Superette • few convenience stores
Neighbour-hood centre	±5 000-±12 000 25-50 stores	Centrally located for a group of suburbs	Major collector roads	LSM 1-5, (20 300-47 000) LSM 6-9, (9 000-20 100) LSM 10-10+, (3 700-8 600)	±135 000 ±51 000 ±18 500	All LSM 4-10	2	4-9	• supermarket • convenience • some small specialised stores
Community centre	±12 000-±25 000 50-100 stores	Strategically located to serve a suburban community	Major arterial road	LSM 1-5, (44 000-103 000) LSM 6-9, (20 000-46 000) LSM 10-10+, (8 000-19 000)	±295 000 ±115 500 ±41 000	All LSM 4-10	3	6-14	• large supermarket • convenience • small national clothing • restaurants & takeaways • services
Small regional/ Large community centre	±25 000-±50 000 75-150 stores	Specific sub region of city (can be large self contained community, i.e. Chatsworth)	Major suburban arterial road linking to a provincial highway	LSM 1-5, (90 000-209 000) LSM 6-9, (40 000-90 000) LSM 10-10+, (17 000-38 000)	±600 000 ±280 000 ±83 000	All LSM 4-10	5	10-16	• large supermarket • 1 or 2 large clothing anchors • Strong national tenant comparison goods component • boutiques • restaurants • entertainment • services
Regional centre	±50 000-±100 000 150-250 stores	Large region of city/or whole city/rural towns	Major arterial road usually a Provincial main road linking to a National road	LSM 1-5, (180 000-420 000) LSM 6-9, (80 000-185 000) LSM 10-10+, (33 000-76 000)	±1 200 000 ±464 000 ±165 000	All LSM 4-10	8	14-20	• large supermarket • (even 2) or hyper • 3 or more large clothing • small clothing stores and boutiques • entertainment, restaurants • services • convenience
Super regional centre	>100 000 >250 stores	Large region in city and surrounding areas/Tourists	Major arterial road usually a Provincial main road, linking to a National road	LSM 6-9, (106 000-250 000) LSM 10-10+, (44 000-101 000)	±623 000 ±217 500	Above average LSM 5-10	10+	24-30	• as at regional but more emphasis on entertainment and variety

Type of Centre	Size of centre (m^2)	Trade area	Access Require-ments	No. of households	Population	Socio-economic groups	Ave Radius (km)	Median Travel time (min)	Main tenants
SPECIALIST CLASSIFICATIONS									
Big Box Retailers	Vary from 2 000 to 15 000	Depend on type of store or centre - mostly on regional level	Major urban arterial main road	LSM 6-9, (±25 000) LSM 10-10+, (±14 000)	50 000-100 000	Mainly above average LSM 7-10	5-10	10-30	• specialist traders
Entertainment /Casino	Vary from 2 000 to 30 000	Depend on type of store or centre - mostly on regional level	Major urban arterial main road	5 700 – 85 700	20 000 – 300 000	Average and higher LSM 5-10	5-10	10-30	• specialist traders/ entertainment and/or theme centre • emphasis on food, restaurants & fast food outlets
Lifestyle Centre	15 000 – 50 000 (can be smaller or larger)	Upscale catchment areas	Major urban arterial main road	LSM 6-9 (40 000-60 000) LSM 10-10+ (20 000-30 000)	±200 000 ±105 000	Mainly LSM 9-10	3-8	6 - 20	• upscale supermarket • book stores • dining • entertainment • speciality retail (house/home/garden) • fresh produce stores
Value Centre	10 000 – 50 000	Next to regional centre or on main road/highway	Major urban arterial main road	LSM 6-9 (40 000-60 000) LSM 10-10+ (20 000-30 000)	±200 000 ±105 000	Middle to above average LSM 6-10	3-6	10-15	• emphasis on big box retailers • specialist retailers • home improvement • small to large groceries
Hyper Centre	15 000 – 35 000	Strong correlation with a regional centre	Major urban arterial main road.	LSM 10-10+ (21 400 - 50 000) LSM 6-9 (60 000– 100 000)	75 000 – 175 000	Middle to above average LSM 5-10	6-8	10-15	• one hyper store (70% of area) • convenience line stores • services
Motor Showrooms	500 -5 000		Along major arterial routes			Higher LSM suburbs			
Filling Stations	30 - 260	Local & through traffic	Main arterial routes, highways and feeder roads	Depend on the size of the filling station		All LSM 4-10			• convenience store • ATM • fast food • car wash
Airport Retail	Depending on size of airport	Size of airport will determine size of retail	Accessibility for arrivals & departures & visitors			Mainly higher LSM			• mainly food • curio's & souvenirs • clothing • exchange services

Type of Centre	Size of centre (m²)	Trade area	Access Requirements	No. of households	Population	Socio-economic groups	Ave Radius (km)	Median Travel time (min)	Main tenants
UNPLANNED/INCREMENTAL CLASSIFICATIONS									
CBD/ Town Centre	Vary from 10 000 to 300 000 Number of stores depend on size of town	Normally very wide -outlying township areas	Major roads running through the CBD/ Town Centre – focus on taxi/train/bus transport	Normally very high, starting at ±10 000 households	30 000+	Dominant LSM 4-6	Not fixed- Up to 50 km	Mainly by taxi	Wide variety of tenants including: • national tenants • supermarkets • homeware stores • furniture stores • cell phone shops • banking facilities
Taxi Rank Retail /Commuter Centre	1 000 to 15 000 Depending on station	Same as above	Highly accessible area adjacent to taxi ranks/station	Same as above	20 000 – 300 000 People per day	Mainly LSM 1-6	Not fixed- Up to 50 km	20 minutes plus	• national tenants • supermarkets • homeware stores • fast food outlets • cell phone shops • ATM facilities
Flea Markets/ Informal Trade	Vary from a few stands to hundreds of stands	Focusing on passing pedestrian volumes	High volumes of pedestrian traffic is important	Not applicable	Pedestrian volumes need to be very high	Mainly LSM 1-6	Part of larger town/rural trade area	Passing by	• food • clothing and shoes • fruit and vegetables • electronic equipment and cell phones • music and DVDs
Spaza Shops	10 – 50	Provide the surrounding residents – walking distance 400-800m		200 - 400+	2 000 +	Mainly LSM 1-6	Up to 500m	Up to 5 minutes walking time	• convenience grocery goods • cigarettes
Rural Retail Development	5 000 – 30 000	Whole community up to 50km	Close to main community and taxi facility	20 000 - 210 000	80 000 – 560 000	Mainly LSM 1-5	Very wide up to 80 km	Up to 45 minutes	• depend on the size – need to focus on the needs of the surrounding community

7. CONCLUSION

The first classification of retail facilities goes back to the middle sixties of the previous century. Most of the overseas classifications, including that of the International Council of Shopping Centres as well as the latest European Classification of Shopping Centres only focused on the broad core classification. Shopping centres were classified into several basic categories including community centres, neighbourhood centres and strip centres. Early shopping centres tended to be fairly uniform designed to satisfy more of the mass merchandise demands while offering the convenience of one stop shopping. (In South Africa 1965- 1980)

The next major trend in shopping centre development was the age of the regional mall. (1970-1990) These regional centres were enclosed (malls) and most of our older regional malls were built during this period. These are currently amongst the best performing centres in the country.

The last phase is that of product differentiation and the development of a large number of speciality type centres. (Post 1994) The approach is to offer different retail facilities to the market. The success of these speciality centres varies from development to development.

The development trend in South Africa will definitely focus on the following in future:

- The close monitoring of urbanisation trends to identify new development opportunities in the metropolitan areas;
- The saturation of especially the upper LSM markets where the focus will in future fall much more on experience and exclusivity together with convenience.
- The growth in the middle segments of the market will create more opportunities in especially the metropolitan and urban markets;
- According to all the above mentioned it is clear that development opportunities still exist in township areas to complement the existing hierarchy of shopping centres with more neighbourhood centres;
- ± 60% of the total population in South African is urbanised. It means that most of the 20 million rural inhabitants are still in need for better retail facilities.

The retail arena is extremely competitive with developers seeking sustainable and better opportunities to offer something unique to satisfy the changing needs of the customers. Retailers also need to grow their business by opening new stores. The classification of retail facilities as indicated above can go a long way to increase market efficiency and help focus development activities on viable product categories.

The classification as spelled out above will also assist town planners to understand new retail formats like mixed use, lifestyle centres, infill developments and how specific speciality retail categories work.

A classification of retail facilities will always **change** as this sector of the economy **keeps changing.** It remains the most dynamic urban land use because of the continuously changes in shopper behaviour, needs, trends and preferences.

This classification was designed to cater for the unique retail offering in the broad South African market. South Africa is the one country where the supply of retail facilities is almost 50% 50% based on traditional and organised retailing. This classification was therefore broadened to make provision for a much broader approach. This broader approach also clearly highlighted the development opportunities that still exist in specific retail development segments and categories.

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