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COMMERCIAL GROWTH AND CONSUMER BEHAVIOUR IN SUBURBAN SALISBURY, RHODESIA

by

M. A. H. SMOUT

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Readers should note that all measurements in this study are expressed in SI units with Imperial or Cape equivalents given where appropriate. Unless otherwise stated the currency referred to is the Rhodesian dollar (100 cents = $1) which in November 1974 was equivalent to £0,72 sterling.

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M.A.H.S.

CHAPTER 1 INTRODUCTION

1.1 The aims and scope of the study

The primary aim of this study is to provide an explanatory description of the changes that have taken place in the field of suburban commerce and associated consumer behaviour in Salisbury during the last six years. In many parts of the world the recent and rapid expansion of suburban commercial facilities has not only proved an interesting phenomenon in itself, but has been responsible for a marked change in shopping patterns and shopping habits of urban residents. In this, Salisbury is no exception, for the rapid post-war expansion of the city and its suburbs has been accompanied by an equally spectacular growth in suburban commercial facilities; there were only 13 small clusters of shops in the suburbs in 1950 while to-day there are 68 shopping centres, several of which offer a sophisticated range of retail and service facilities.

The complexity and nature of suburban shopping centres in Salisbury formed the basis of a major investigation undertaken in 1968 and reported elsewhere.[1] This 1968 study not only makes possible the current one, but in essence gave rise to it, for the chief limitation of the original investigation was its static nature; it surveyed a dynamic situation at a fixed point in time. This limitation, recognised from the start, led to an ongoing research programme initiated with the intention of resurveying at two year intervals this rapidly changing aspect of commercial development in Salisbury. Four such surveys have now been undertaken (1968 – 70 – 72 – 74) and whilst the pattern of development is still evolving quite rapidly, it is felt that sufficient data has been collected and sufficient experience of the situation gained to warrant a

[1]Smout, M. A. H. 1970a. A functional classification of shopping centres in Greater Salisbury. *Rhod. Sc. News* 4, pp 126-129
1970b. Suburban shopping patterns in Greater Salisbury. *Geog. Assocn. Rhod. Proceedings* 3, pp 41-49
1971a. Shopping centres and shopping patterns in two African townships of Greater Salisbury. *Zambezia* **2**, 1, pp 33-39
1971b. *Service Centres in Greater Salisbury Rhodesia.* Unpubl. Ph.D. thesis University of London.

considered review of developments to date and a forecast of future trends.

The remainder of this introduction sets out to lay a foundation for the chapters which follow. It is intended essentially for readers who are not familiar with urban development in Anglophone southern Africa where all the traditions of early British Colonialism are so clearly stamped, both in the fabric of the towns and in the way of life of their inhabitants. To those who know Salisbury, sections 1.2 to 1.4 will appear as statements of the obvious, while to those who don't these sections are intended to identify and describe those elements of the city's townscape which are relevant to a study of its commercial growth and consumer behaviour.

1.2 Early Salisbury

Salisbury, Rhodesia's capital city, was founded on the 13th September 1890 when members of the Pioneer Column raised the Union Jack on a site which ultimately became the Town Square. First known as Fort Salisbury and taking its name from the then Prime Minister of England, the settlement was intended to form an administrative focus for the British South Africa Company formed under the guidance of Cecil John Rhodes to exploit a Royal Charter granted for 'lands north of the Limpopo'. The embryonic settlement was well placed relative to the areas it was intended to serve. Two of these areas, Mazoe to the north and Hartley Hills to the west were expected to become rich goldfields and rival the wealth of the South African Witwatersrand. While such expectations were not to be realised, Salisbury has developed as the main urban centre in a country possessing much agricultural potential and substantial mineral wealth. The fortunes of the city have been closely tied to those of Rhodesia as a whole, and in general growth has been rapid for in the 85 years of its history, the settlement has expanded to cover some 532 km² with a total population of 513 000 persons in December 1973.

Details of the city's development history although interesting, are not particularly relevant to this study and may be read elsewhere[2]. Suffice it to note that the first survey of stands was complete in mid 1892 with the most expensive land realising £70 per half acre; these same sites near the centre of the modern central business district have a current market value in excess of $1 000 per square metre ! In 1897 Salisbury attained Municipal status and in 1901 the BSA Company granted the municipality 8 100 ha to form its commonage. Further significant stages

[2]Tanser, G. H. 1965. *A scantling of time.* A story of Salisbury Rhodesia 1890-1900. Stewart Manning, Salisbury.

in the settlement's early history were the railway connections first with Beira in 1899 and then with Bulawayo and South Africa in 1902.

In the first decade of the twentieth century an unusual feature of development was initiated, which was to affect the urban area until the present day. Surveyed residential plots on the Salisbury Commonage were sold by public auction but at reserve prices which many persons considered absurdly high. In consequence, the owners of farms which bounded the city began selling residential plots varying in size from one to forty acres (0,4 to 16,2 ha) at prices well below those on the commonage and so attracted many residents to areas outside the municipal limits. Thus the spatial development of Salisbury has taken two forms. Firstly a steady expansion outward from the centre within the commonage boundary and secondly, by continued and successive subdivision of farms bounding the city. Several of these farms developed into autonomous suburbs (called Town Councils) which were incorporated into Greater Salisbury in July 1971. The result of this twofold nature of spatial growth is a city characterised by very low overall densities of development. Not only is the allocation and use of open space on developed stands generous by most standards, but large tracts of land within Greater Salisbury remain virtually untouched and contribute further to the low densities. And low densities of development are a vital element in any consideration of suburban commerce and related consumer behaviour.

Perhaps the simplest way to gain an understanding of the rate of growth of Salisbury is to examine its population growth. Regrettably, the African population was enumerated only in the 1962 and 1969 censuses so that growth must be traced through the non-African population. In 1896 the first official estimate of the city's poulation recorded 1 319 non-Africans and the first three censuses noted the following populations:

1904	1 725 persons
1907	1 084 persons
1911	3 479 persons

Up to 1911 the whole of Salisbury was enumerated as one unit, there being little need for greater detail as the outer suburbs possessed few permanent residents. However from the 1921 census onwards the population of the outer suburbs was noted separately and growth since this date is illustrated in Figure 1.1 .

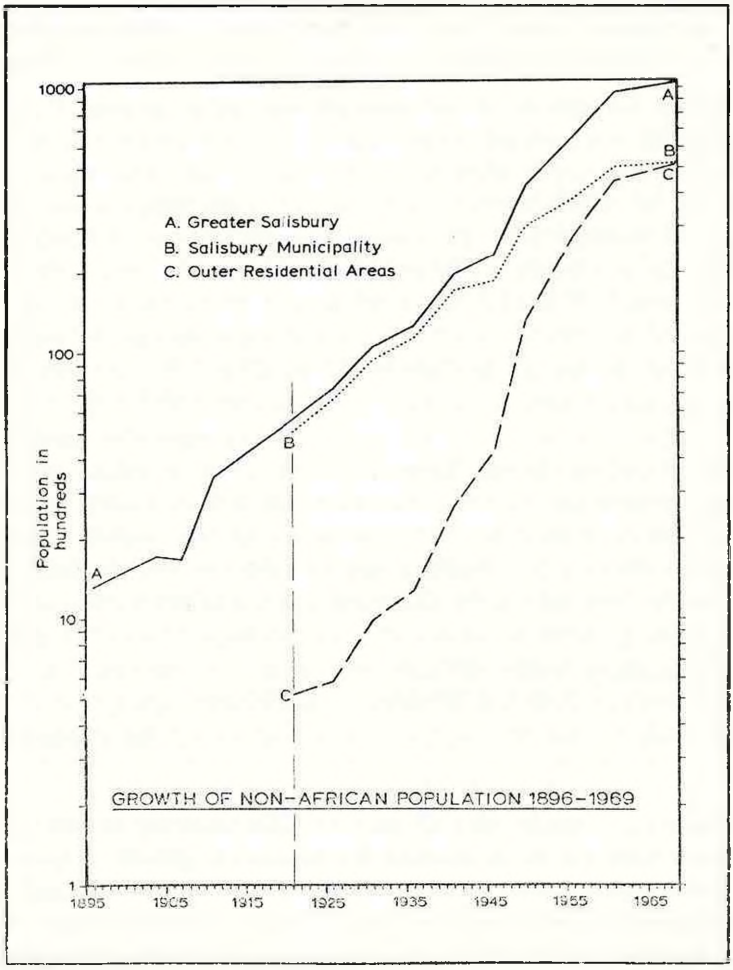

Fig. 1.1 Non-African population growth in Greater Salisbury 1896-1969

Several significant features of population growth (and thus to a large extent physical growth as well) are revealed in Figure 1.1 . Greater Salisbury has experienced a doubling of its non-African population every ten years from 1911 to 1961 while the outer suburbs have trebled their population at the same time intervals and over the same period. The rate of increase has been steady and rapid except for two notable periods. The first from 1946 to 1951 saw large scale immigration to Rhodesia which boosted Salisbury's population markedly. The second, of decellerating growth in the period 1961 to 1969 may be attributed firstly to

the dissolution of the Federation of Rhodesia and Nyasaland at the end of 1963 and secondly to Rhodesia's assumption of independence in November 1965 which created a political and economic climate unfavourable to continued large scale immigration.

The city's population has however continued to grow steadily and the latest official estimate in December 1973 gave a total of 513 000 persons constituted as follows:

Africans		
In African Townships	256 000	
In 'European' Areas	124 000	
Total Africans		380 000
Asians	4 400	
Coloureds	6 440	
Europeans	122 100	
Total non-African		132 940
TOTAL POPULATION		512 940

1.3 The European suburbs

The spatial separation of the main racial groups has always been a feature of British Colonial towns in south and central Africa; a feature which persists in post-Colonial times under White dominated governments and which in this study of Salisbury necessitates separate treatment of the European and African residential areas.

At the outset it should be noted that the so called 'European' suburbs contain persons of all races and indeed, in some suburbs, Africans are in a majority. There are currently 124 000 Africans resident in the European parts of the town and the characteristic population structure of a single suburb is well illustrated by the following example of Mount Pleasant.

Mount Pleasant Town Council Area
Population Census 1969

Africans	4 290
Asians	20
Coloureds	4
Europeans	5 960
Total	10 274

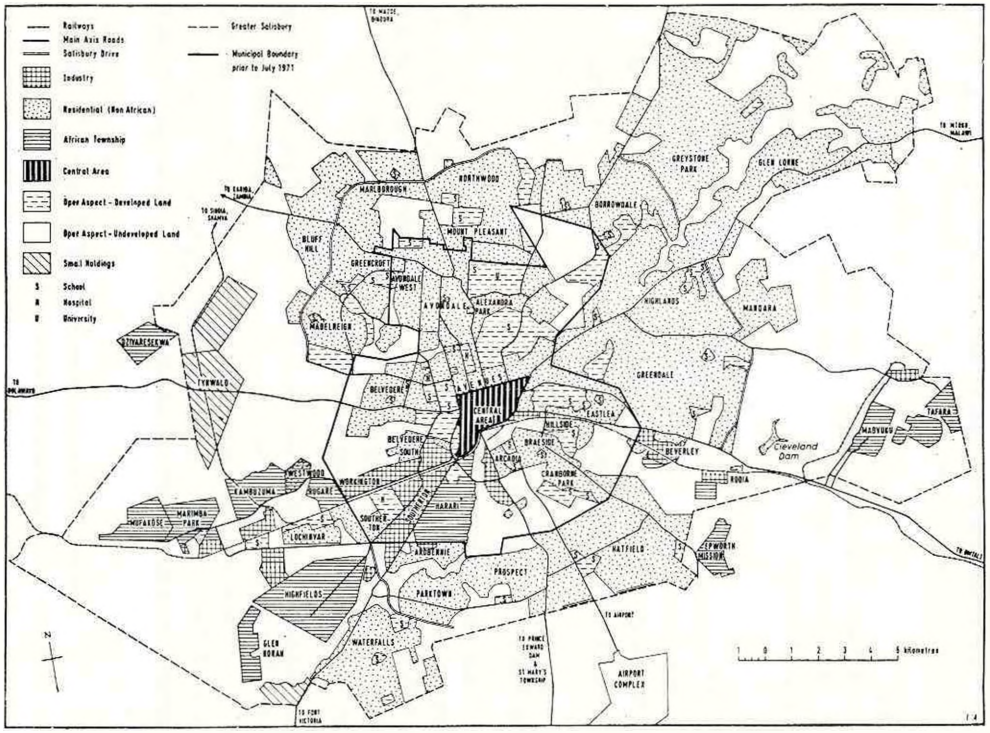

Fig. 1.2 Greater Salisbury, layout and land use

The ratio of Africans to Europeans in these suburbs is chiefly a function of European affluence,[2] for almost all Africans in the European suburbs are employed as domestic servants. The norm is two per household and there were just on two thousand homes in Mount Pleasant at the time of the census.

With a few exceptions, the European areas exhibit very low densities of development. The exceptions all lie close to the central area of the city where land values are highest and where much old property is ready for demolition. The highest density of dwelling units lies just north of the city centre in a small (3 km x 1 km) area known as the 'Avenues' (Fig. 1.2.) where tall blocks of flats are rapidly replacing old detached dwellings. Although this region includes a shopping centre it is within walking distance of the city centre and hardly suburban; its population plays little part in shaping suburban shopping patterns.

South of the city centre in Arcadia (a township for Coloureds) Braeside and Cranborne Park the characteristic dwellings are single storey detached houses on plots ranging from 500 to 2 000m² (eighth to half an acre) and this to Salisbury residents is high density housing. With the exception of Mabelreign and Avondale where 2 000 m² plots dominate, the rest of suburbs are noted for one acre residential plots occupied by single storey detached houses; again Mount Pleasant will be taken as a representative example.

Figure 1.3 illustrates 100 hectares (247 acres) of Mount Pleasant and apart from dwellings includes a shopping centre and embryonic civic centre developed by the now superseded Town Council; such features exist in most suburbs. If a different area had been depicted school buildings and their adjacent playing fields and perhaps a sports club with tennis courts and bowling greens would replace the civic and shopping centres. Within the area shown are 157 detached houses and 12 flats in two small blocks owned by the University. No property is less than 4 000m² (1 acre) in extent and several stands cover larger areas. Normally outbuildings will include a garage or carport and domestic servants' quarters which commonly consist of one room per employee together with toilet and cooking facilities. Evidence that the suburb houses some of Salisbury's more affluent residents is

Kay, G. and Smout, M. (eds) (in press) *Salisbury: capital of Rhodesia*. University of London Press.

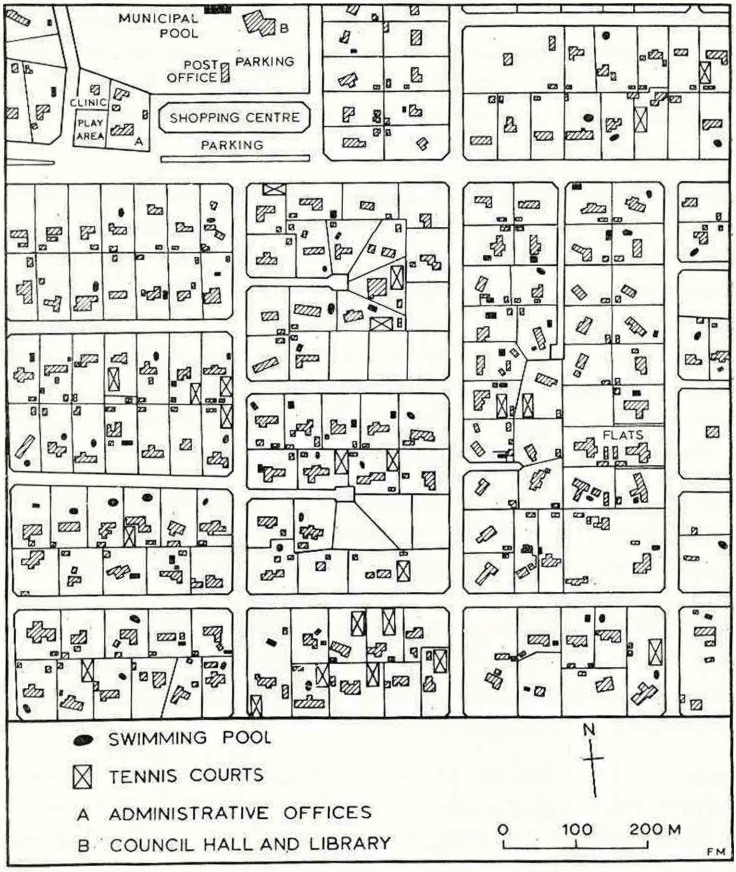

Fig. 1.3 100 hectares of Mount Pleasant

provided by the 85 swimming pools and 23 tennis courts on private property. However this study must focus attention not on indicators of affluence which vary considerably around the suburbs, but on the density of development which is a common characteristic of the European residential areas and which imposes a particular way of life on their residents. Development at this density makes a public transport system most unsatisfactory even when it is heavily subsidized and most families are therfore entirely dependent on private motor cars; and with the divergent interests and activities of many families this often necessitates two vehicles per household unit. A recent survey in Mount Pleasant gave vehicle ownership as 1.99 per household and as some households consist of single persons it is obvious that the three car family is not uncommon.

Thus to the entrepreneur engaged in the development of suburban commerce in Salisbury three elements are of vital importance; the very low population densities (about 7,5 persons/hectare gross), the relative affluence of the population and its very high degree of mobility.

1.4 The African Townships

The African Townships which form a ubiquitous part of the urban fabric throughout southern Africa have been neatly described as 'products of poverty and paternalism'. Left to his own resources the urban African would have little alternative for accommodation but to build and reside in a shanty town. This solution was never acceptable to Colonial governments nor to their White successors and thus a form of subsidized housing came into existence. The African township to-day is in essence a dormitory suburb, usually owned and administered by the municipality concerned, which aims at providing living quarters and basic amenities at a price which the urban African can afford. There are several such townships in Greater Salisbury generally situated in the southern part of the urban region near to the city centre and industrial sites, the main areas of employment for township residents who number approximately 256 000. Unfortunately limitations of time and money together with difficulties of access for research restricted the initial survey of shopping centres and shopping patterns to two representative examples of the African townships and subsequent efforts have had to be narrowed further to the township of Harare.

Harare, the oldest of Salisbury's African townships, is situated 4 km to the south of the city centre and houses an official population of 60 000 persons on 509 ha (1 257 acres). The demographic characteristics of this population are striking evidence of the extent to which rural migration is selective of youth and males:-

Harare 1974 Population

Single men	24 600
Families	35 600
Single women	200
Total	60 400

An age/sex breakdown points to the dominance of males and the relative lack of children. Regrettably many of the 'single' males are men separated from their families which often remain in remote rural areas whilst father tries his luck in the urban cash economy.

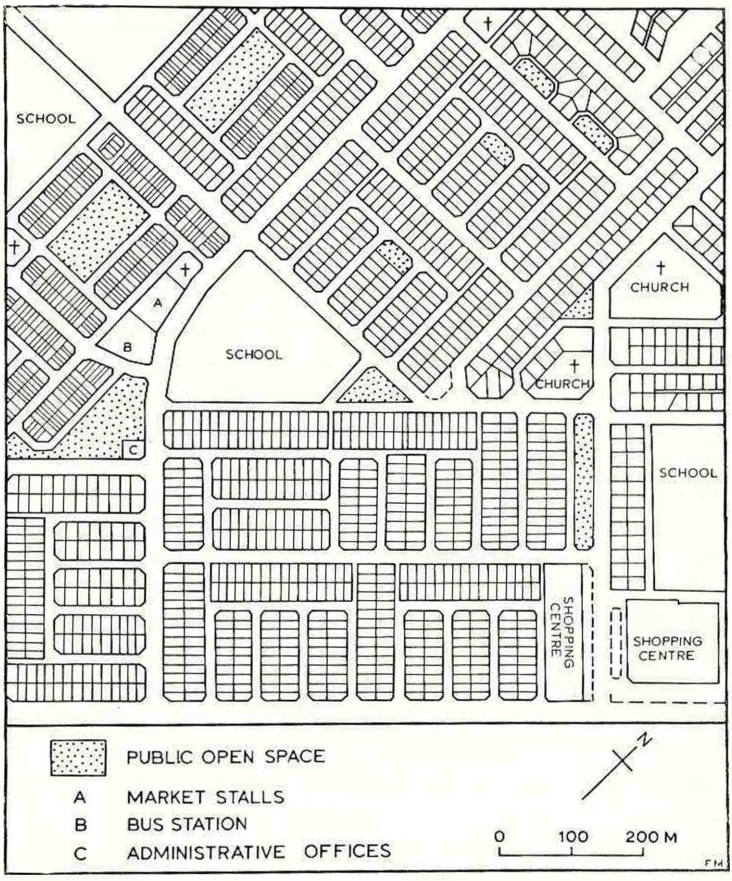

Fig. 1.4 100 hectares of Highfields African Township

The first and over-riding impression of the Harare townscape is of monotony and the general spartan aspect of buildings contrasts markedly with the affluent European suburbs. This is to be expected when mass produced low cost housing is developed at densities of up to 50 units per hectare (20 units/acre) and there is little money available to improve building finishes and the general aesthetic appearance of the township. As an example, Figure, 1.4 illustrates 100 ha of Highfields African Township and a townscape which contrasts markedly with that shown on Figure 1.3. Apart from housing the township possesses a wide range of social and civic amenities with schools, clinics, churches and recreational facilities. There are also three market places and several shopping centres and the basic needs of residents

can be met within the township. The major exception to this is employment and nearly all of the townships' population must journey to the city's main industrial sites or city centre to work. The daily oscillation between the township and the rest of the city provides township residents with opportunities to shop in both areas and this movement of the urban African conditions his shopping habits and affects the retail and service facilities that he patronises. And it is against this background that the initial study set out to examine suburban commercial facilities and associated consumer behaviour.

1.5 The 1968 study

Against the background of low density European suburbs has developed a close network of suburban shopping centres. The few in existence before 1950 were simple affairs providing for a minimum of daily needs and usually centred around an original farm trading store. Since 1950 however, commercial trading sites have been provided for in almost every new parcel of residential land that has been developed, and a rapid growth in the number of centres has ensued. The centres have grown piecemeal as each developer has responded in his own way to market demands. Only a few of the more recent centres consist of single structures financed by one company and with a carefully planned layout of shops and parking space.

The initial phase of the 1968 study involved the identification of all shops and shopping centres within the region that do not form part of the city centre. Using a 1:25 000 street map as a basis for survey, every road of the region was travelled in mid 1968. In all, 55 shopping centres (ie. 2 or more shops grouped on land laid out for the development of shopping facilities) were identified, together with three cases of isolated shops of poor quality in the outer residential suburbs. At a later stage when analysis of centres had commenced these three shops were excluded from further study as they attract little trade and have only a very slight effect on shopping patterns in the region (by 1972 two of these shops had ceased to exist). The 55 shopping centres are listed in Appendix A and illustrated in Figure 1.5 which also demonstrates the very broken nature of the European residential suburbs. In most cases shopping centres take their names from the suburbs they serve.

For each centre a map was prepared at a scale of 1: 1 250 showing the layout of the centre and its constituent shops. This base map allowed the precise recording of all functions performed according to type and position and from these data a land use map of each centre

was compiled. The land use survey enabled the listing of some 50 functions performed in the centres and these were grouped into several broad categories (see Appendix B). Certain types of functions such as supermarkets and general dealers which vary greatly in size, quality and variety of goods offered, required sub-classification. For example three grades of supermarket were distinguished ranging from major establishments carrying an extensive range of goods on premises of 1 000m² (11 000 sq. ft.) or more, to those which are little more than general food stores operating on the self service principle. It was also necessary to record bank and building society branches separate from their agencies, as the former represent central functions of a significantly higher order than the latter.

From the list of functions performed in each shopping centre it was possible to rank the centres according to their functional complexity. Ranking on the basis of the number and type of functions can be achieved in several ways each with its own merits. However in this study where functions differ greatly in importance and ability to attract custom, some form of weighting was considered desirable in evaluation of the functional importance of shopping centres. Therefore, with the exception of those functions which do not contribute directly to the centrality of shopping centres (i.e. industrial and residential uses), the functions were ranked according to the frequency of their occurrence and grouped, and a score was assigned to each group so that those functions which occur least acquire the highest score. This method of weighting functions assumes that those of lowest order will occur first in the establishment of a shopping centre and that as further development takes place functions of a higher order will be added. Using Clark's concept of a group[3], analysis of the frequencies of functions suggested a division into five groups and testing of the observed frequency of functions in groups and the expected frequency based on the number of functions in each group gave a probability value of 0,1% i.e. there is almost no likelihood that the arrangement of functions in groups is the result of chance. A list of the functions recorded in the shopping centres together with the scores allocated to each is given in Appendix B.

On the basis of scores allocated to functions, a total score was calculated for each shoping centre indicating its functional importance. The

[3]'that every member of a group should be closer to some other member of the group than some other point'. See in
Clark, P. J. and Evans, F. C. 1954. Distance to nearest neighbour as a measure of spatial relations. *Ecology* 35, pp 445-453

score for the 55 shopping centres ranged from 2 to 203. A plot of functional scores ranked in descending order of magnitude does not suggest clearly defined groups of centres which appear as points on a continuum rather than in an hierarchical arrangement. However, considering the range of scores and the overall aims of the survey a classification of the shopping centres into groups was considered necessary. The further application of Clark's concept of a group to the range of functional scores suggests five categories of shopping centres with functional scores in the following ranges.

Grade of centre	Functional scores 1968
1	2 to 9
2	11 to 17
3	22 to 34
4	37 to 57
5	96 to 203

The arrangement of centres in groups according to this classification was confirmed by the application of a probability test which showed the possibility of the adopted grouping occurring by chance is less than 0,1%. Further, this initial grouping of the centres was later confirmed by a further indepndent ranking on the basis of service area populations.[4] The 1968 classification of the initial 55 shopping centres together with their reference numbers is shown in Figure 1.5.

The study of commercial facilities in the African Townships followed the same pattern of data collection although shopping centres were too few to warrant classifying. In any event as only one township is includded in this study space permits a detailed consideration of changes in its commercial structure and these are examined in Chapter 5 along with consumer behaviour patterns.

At the time of the 1968 survey a considerable number of vacant shop and office premises were recorded in the shopping centres and it was quite clear that development of suburban commercial facilities had progressed ahead of demand. In consequence, reduced rents were offered and these in turn led to an over-provision of certain types of facilities and fierce competition between them. The pessimists in local commerce noted that the 55 shopping centres in the European suburbs had on average a support population of only 900 persons and that severe financial losses could be expected in some centres. On the other hand the

[4]Smout, M. A. H. 1970a. ibid.

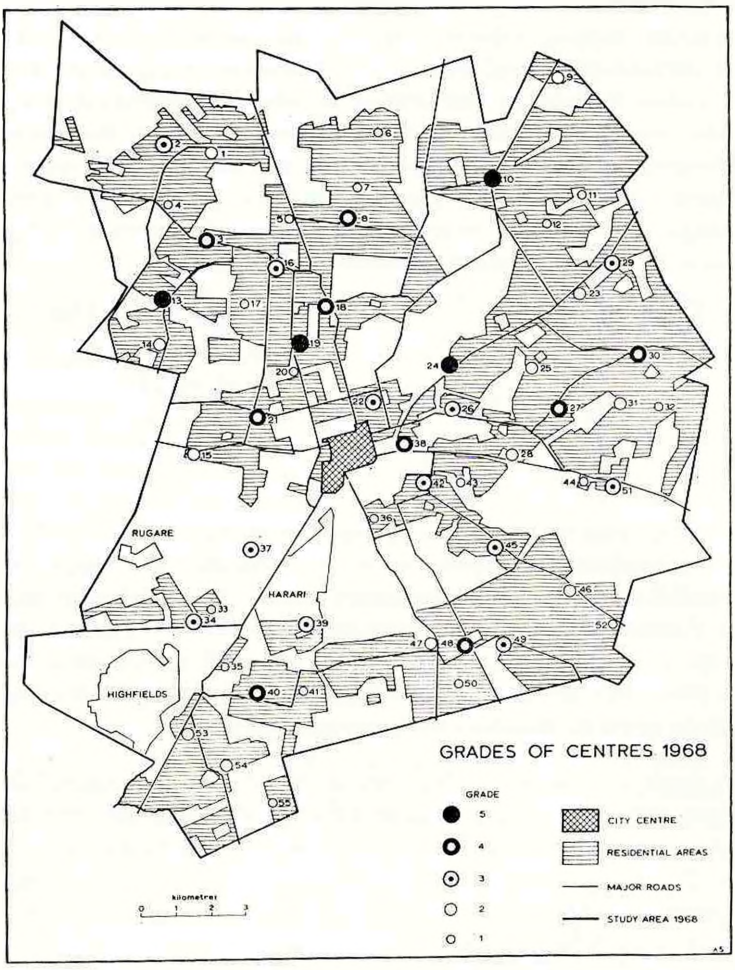

Fig. 1.5 Residential areas and shopping centres 1968

optimists noted that there was considerable potential for growth in trade as nearly 60% of suburban residents made most purchases in the city centre and that increasing congestion there along with rising transport costs might persuade more persons to patronise their local shops. In short the optimists have proved correct, and the last six years has witnessed remarkable growth in suburban commercial facilities. This growth has however not been uniform and the pattern it has taken, along with associated changes in consumer behaviour, forms the subject matter for the following chapters.

CHAPTER 2 COMMERCIAL GROWTH IN THE EUROPEAN SUBURBS

2.1 The New Centres

Growth in the provision of retail and service facilities in the suburban centres has taken two forms. Firstly there has been an increase in the number of centres from 55 in 1968 to 68 in 1974 and secondly, most centres have experienced an increase both in the range and in the number of facilities they possess.

Of the thirteen new centres, five are situated in residential areas which have developed almost entirely since the initial survey. Of these five, only one Ashdown Park (No. 59) lies on the western side of the city, while the other four are all situated in the popular north-eastern extensions to Salisbury's residential areas, (Figure 2.2). These centres, named after the suburbs in which they are situated (Mandara (58), Greystone Park (62), Glen Lorne (65), and Helensvale (66) are all in attractive broken countryside which offers good views. Each of these areas has however developed at densities of 1 household per 4 000 m² (1 acre) or less which has given rise to serious problems of economic viability in some shopping centres. Two of the new centres, Lytton Road (60) and Workington (61) are situated in the industrial areas to the south west of the city centre and are evidence of a new trend. These centres do not serve a locally resident population but rely for their support on the daytime — essentially African — workforce that is employed in the adjacent industrial sites. Not only do these centres provide a convenient point for minor purchases or much needed services like dry cleaning, but they permit a normal range of daily purchases to be made. As many African workers arrive back in the townships after shops there have closed for the day, it is not surprising that shopping centres in the industrial sites are well patronised and expanding rapidly.

Two more of the new centres represent development on previous trading store sites to the point where it was considered appropriate to record them as shopping centres. That of Lyndale (63) lies in the

extreme south-west corner of Greater Salisbury while Cedrella (64) is situated in Lochinvar; a suburb owned and administered by Rhodesia Railways for its European employees. The remaining four new centres may be regarded as 'fillers' in that their establishment has been a response to the further development of suburbs in existence in 1968 and with one exception these centres are not sited on the periphery of suburban development. That of Chadcombe (67) is the only one in the main section of the southern suburbs whilst Cleveland (68), which consists of a single major supermarket is something of an oddity sited in a rather isolated position.

The remaining two new centres, Pendennis Road (56) and Groombridge (57) are evidence of a peculiar aspect of local shopping centre development. During the 1950's when Salisbury's suburbs were expanding rapidly in response to the immigration boom, almost every new layout of house plots (known as a 'township') was permitted to include a portion of land zoned for commercial development. Numerous potential sites came into existence in a very short space of time with little or no consideration of their relative positioning. In time the majority of these sites were developed but a number remain to this day as potential shopping centre locations. They await either capital, a higher density of housing development, or some entrepreneur's whim, but each is a potential disruption to an already functioning system of suburban shopping centres. Both Pendennis Road and Groombridge are examples of the late development of such sites. The former is struggling to exist whilst the latter is already a centre of considerable importance in the north-central suburbs.

Current policy of the city planners is to consolidate as far as possible the very broken and irregular nature of the residential areas. If this policy succeeds it could lead to the development of further new shopping centres, not at the periphery of existing development where it might normally be expected to occur, but within the existing suburban commercial framework.

2.2 **Functional growth**

The provision of retail and service functions in the shopping centres has expanded markedly and in terms of the number of such units, has doubled in the six years to August 1974. The actual range of shopping, financial and other services and social and administrative functions shows little change although the more specialist and sophisticated shops and services are no longer sited only in the major centres.

Table 2.1 illustrates the growth of each major category of functions recorded in the suburban centres showing the number of functions for 1968 as an index of 100.

Table 2.1 Growth in types of functions (1968 = 100)

	1968	1970	1972	1974
Food shops	100	116	127	141
Other shops	100	127	146	175
Financial offices	100	133	321	379
Other offices	100	113	153	218
Services	100	130	203	268
Social & Admin	100	104	133	167
Overall	100	123	162	199

Quite clearly there is growth in all categories but it is most marked in the Financial and 'Other' Offices categories and in Services. Several trends are evidenced here. Firstly the last six years has witnessed strong competition amongst the banks and building societies and one manifestation of this competition has been a near quadrupling of such facilities during the study period. Furthermore, extensions to shopping centres are more often of two storeys in height with the upper floors providing office accommodation. Numerous small businesses which wish to avoid the much higher rents charged in the city centre are filling such office space and drawing more people into suburban centres.

Growth in the general Services category — index 268 in 1974 — is an indication of the increasing specialisation of service functions in the shopping centres. Food shops and other retail units exhibit a less spectacular growth but to some extent the data is misleading, for in many cases the development of supermarkets has precluded the opening of a range of smaller shops. Many of the modern supermarkets not only carry a wide range of goods but are designed on the 'shop within a shop' basis so that virtually separate units within the supermarket may offer liquor or meat products and not infrequently a building society agency is sited within the supermarket. Social and administrative functions also have experienced relatively slow growth (index 167 in 1974) but as such facilities are developed almost entirely by the public purse, Salisbury residents should be grateful for the progress measured.

The relative importance of each of the major categories of functions recorded within centres is shown in Table 2.2 This table is based on the raw scores of the number of each type of function (there being no more sensitive data available) but it does enable comparisons to be drawn. Quite clearly food shops have experienced the greatest relative decline with the categories of 'Other' shops and Social and Administrative functions recording lesser declines of 3.4% and 0.7% respectively.

Table 2.2 Functional types as proportions of total functions

	1968	1970	1972	1974	Change 68-74
Food shops	32,8	31,3	25,8	23,3	−9,5%
Other shops	28,0	29,1	25,2	24,6	−3,4%
Financial offices	6,2	6,7	12,3	11,8	+5,6%
Other offices	7,2	6,6	6,4	7,8	+0,6%
Services	21.5	22,7	26,8	28,9	+7,4%
Social & Admin	4,3	3,6	3,5	3,6	−0,7%
	100.0	100,0	100,0	100,0	

On the growth side Financial Offices and general Services show significant increases and provide further evidence of the changing nature of the suburban shopping centres.

Detailed changes in the number of each type of shop and service are shown in Appendix B and only major developments need be noted here. Amongst the food shops two significant points of growth are noted. There has been a marked increase in the number of specialist outlets such as bakeries, delicatessens and greengrocers while at the same time the major increase in the total volume of business attracted to the larger outlets is evidenced in the growth in the number of supermarkets. The 1968 survey recorded 3 large and 19 medium-sized suburban supermarkets; by 1974 these figures were 18 and 38 respectively ('large' in this case means 1 000 m² or more). Although supermarkets carry a wide range of goods their chief function is that of a food store; hence their classification in this category.

In the category of 'Other' shops there has been fairly even growth in all shop types although those selling electrical goods and hardware have more than doubled in number. Of the financial offices only those representing insurance companies have not experienced major growth

while in the 'Other' offices category there has been fairly general growth. Considerable expansion has occurred in all categories of services with large increases in the number of hairdressers (mainly for women) and dry cleaning and shoe repair agencies. The relatively minor growth in the number of petrol and service stations is a reflection of the near saturation point that such development has reached. There are now 77 petrol service stations in the city's suburban centres as well as several more in less central locations and those which are less advantageously sited are known to require considerable subsidizing by their parent company. Of the Social and Administrative functions, only the increase in Post Office agencies from 4 to 15 warrants mention.

Leaving aside such detailed comments, the overall impression is one of considerable expansion of suburban commerce in the last six years. It remains now to note where the growth has been concentrated and whether current trends are likely to continue.

2.3 **Spatial Patterns**

The location of growth in suburban commerce referred to in the previous section may be considered in two ways; its distribution within the five size categories of centres and its distribution in space, within the Greater Salisbury framework.

Figure 2.1 shows the increases in functional score that have accrued to each of the suburban centres. The 55 centres of the initial survey are arranged in their rank order according to 1968 functional scores and the five grades of centres are also indicated. Centres established since the initial survey are grouped in numerical order and for all centres increments of functional score are indicated for the periods 1968-70, 1970-72, and 1972-74; Surveys being undertaken in August/September each year. Score decreases are also shown. Initial impressions are that within each grade of centre growth has been remarkably uneven with some centres more than doubling their functional scores while others show only minimal growth or even decline. However the larger increments of growth are generally associated with the higher grade, more complex centres and as is often the case in such studies, the gap between the largest and smallest centres has increased over the last six years. Inset on Figure 2.1 is a diagram illustrating average score increases per centre for each grade of centre and it is celar that while the rate of growth is highest for the lower grades of centres, the absolute increases in functional score of the grade 5 centres are more than four times those for the grade 1 centres. Centres established since the 1968 survey are

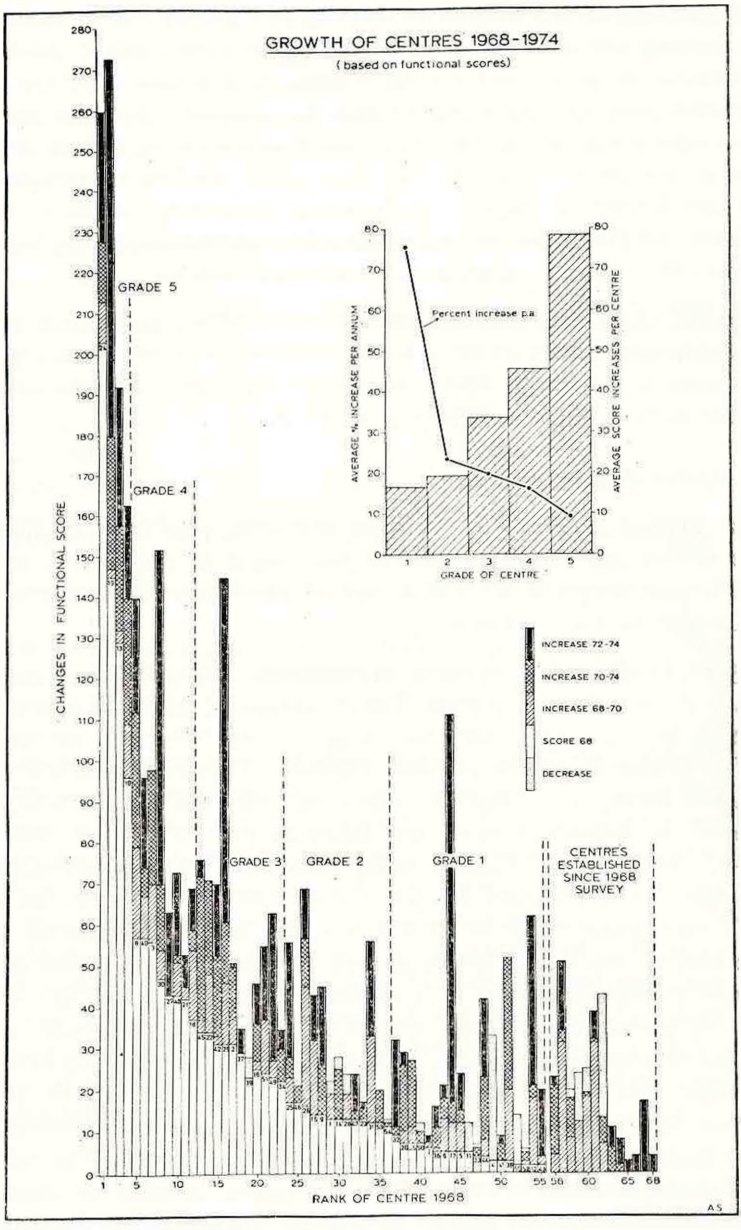

Fig. 2.1 Growth of centres 1968 to 1974

also shown on Figure 2.1 which illustrates the period and degree of initial growth and subsequent changes in functional scores. Several of these centres such as Groombridge are already of considerable local importance while others have experienced a drop in functional score indicating that initial enthusiasm for the development was over-optimistic. Notwithstanding the generalisations depicted in the inset to Figure 2.1 the unevenness of growth increments within each grade of centre suggests that growth may be related to factors other than the size or grade of centre.

A more important factor affecting growth is that of location within the city's suburbs (although size of centre is to some extent a function of location). Figure 2.2 illustrates overall changes in the functional scores of centres between 1968 and 1974 and it is immediately observed that the northern suburbs have experienced far more commercial growth than those to the south of the city centre. There are several reasons for this. Firstly the northern (and in particular the north-central and north-eastern) suburbs house the higher socio-economic groups so that purchasing power is greater in the northern suburbs. Densities of housing development have also had a major effect on the pattern portrayed in Figure 2.2 as the largest areas of relatively high density suburban housing occur in Avondale and Mabelreign and the adjacent townships to the north and west of the city centre. These areas while possessing a lower socio-economic status than the north-eastern suburbs have a significantly greater purchasing power per unit area owing to much higher overall population levels and densities.[1] In contrast, much of the southern suburbs which house the lower middle income groups have developed not only at low densities but in a very broken and irregular manner. Purchasing power per square kilometre in the southern suburbs thus compares most unfavourably with the northern areas of the city.

Of the 7 centres which have experienced major increases in functional scores (+60), all lie in the northern half of the city and of the centres recording increases of 41 to 60 points only two lie south of the city centre. Of these, the Eastlea centre is sited across the road from the Municipal produce market and benefits markedly from this location. The second, Queensdale, is well sited on the main axis road serving the

[1]See chapters entitled 'The Townsfolk' and 'The Residential areas' in Kay, G. and Smout, M. A. Salisbury; a geographical analysis of the capital of Rhodesia. University of London Press (in press).

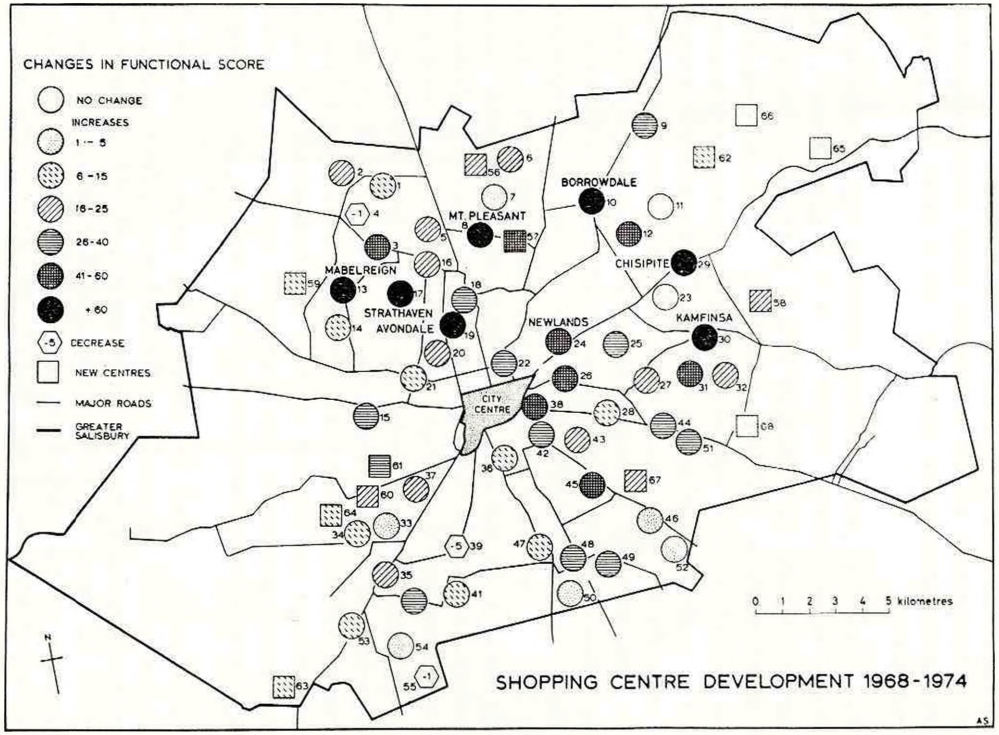

Fig 2.2 Shopping centre development 1968 to 1974

south-eastern suburbs and adjacent to Cranborne Park which includes Salisbury's highest density detached housing on stands of between 500 and 700 m^2. Variations in growth patterns within major sections of the suburbs result mainly from the size of centres and their precise location — ease of access clearly affects the patronage of centres. Figure 2.2 should therefore be studied in conjunction with Figure 2.1 so that increments of growth may be related to the initial size of centres and the periods for which the functional growth was measured.

As increases in the functional scores of centres clearly possess a location component a further analysis was conducted in order to assess the effects of both distance and direction from the city centre on shopping centre development. If the proportion of total functional growth for the six year study period that occurs in each kilometre distance zone from the city centre is related to the proportion of centres in each zone, a very close correspondence is noted (Figure 2.3). Apart from the 4th and 9th zones where functional growth clearly exceeds its expected share (and then only by 7% in each case), distance from the city centre would appear to have no significant effect on increments in functional scores. However a marked contrast with this situation is noted when functional growth is similarly analysed by direction — in eight sectors focussed on the city centre and aligned to points of the compass (Figures 2.3). The heavy concentrations of growth in sectors 2 and 8 is further evidence of the effects of high incomes and high population densities respectively. Both those who invest in suburban centres and those who process planning applications would do well to note the correspondence of these variables with functional growth, for several developments in the past few years have proved costly mistakes; an issue discussed in the fourth chapter.

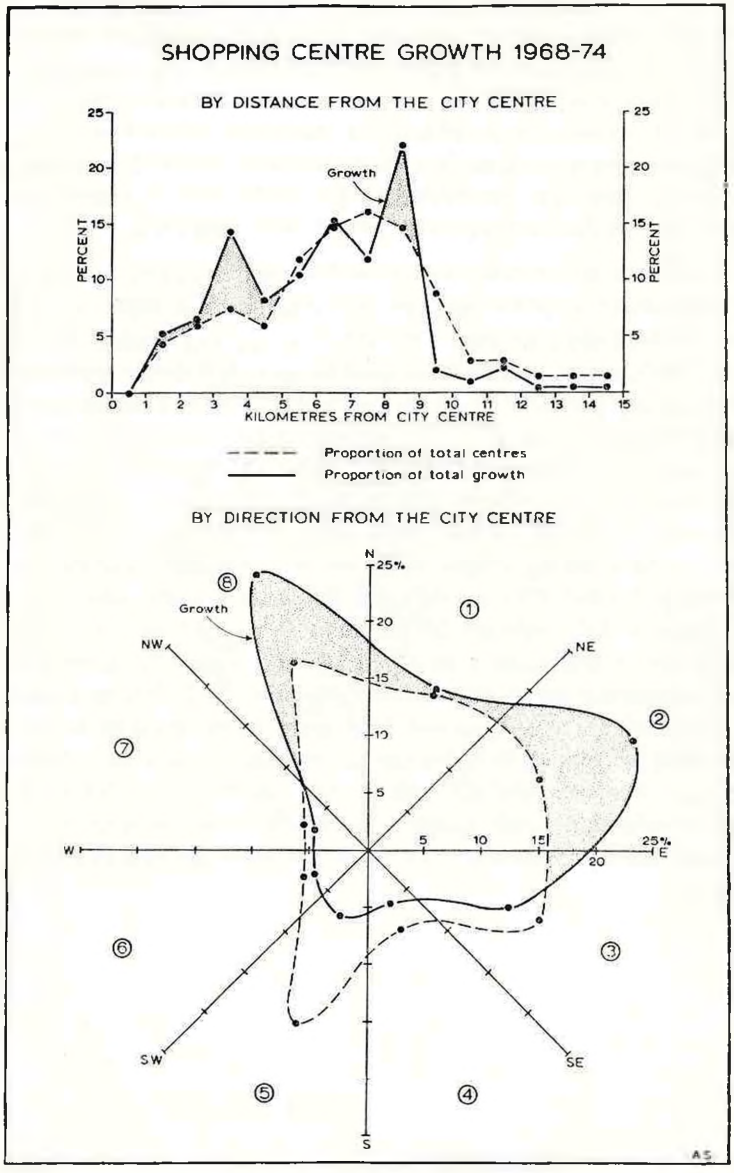

Fig. 2.3 Spatial elements of shopping centre growth 1968 to 974

2.4 Changes in the grading of centres

The 1968 study classified the suburban centres into five grades according to functional complexity (see Chapter 1). At that time there was little evidence to suggest any classical hierarchial ordering of centres but grouping of them was essential in order to facilitate study involving such a wide range of functional scores. The initial grouping of centres into five grades and their location within the study area is shown on Figure 1.5. The exercise of ranking and grouping the centres was again carried out in the 1972 and 1974 surveys (using the same methodology in order to validate comparisons) and changes in the spatial arrangement and number of centres in each of the five grades are interesting to note (Figures 2.4 and 2.5). Table 2.3 lists the centres of the top three grades for 1968, 1972 and 1974.

The number of centres in the top grade (Grade 5) has increased from 4 in 1968 to 6 in 1972 and to 7 in 1974. None of the original centres in this group has dropped out and rank order has largely been maintained with new centres coming in at the lower end of the scale of functional scores. Initially Newlands was the only really large centre but it has now been overtaken by the Avondale centre which is well sited north-west of the city centre in an area where small blocks of flats are becoming the dominant dwelling form. No centre in the southern suburbs has yet attained Grade 5 status and the largest, Parktown, is in a relative sense, declining in importance. All of the Grade 5 centres possess a full range of the retail, service, social and administrative functions recorded (see Appendix B) and in most cases there are several units of each facility.

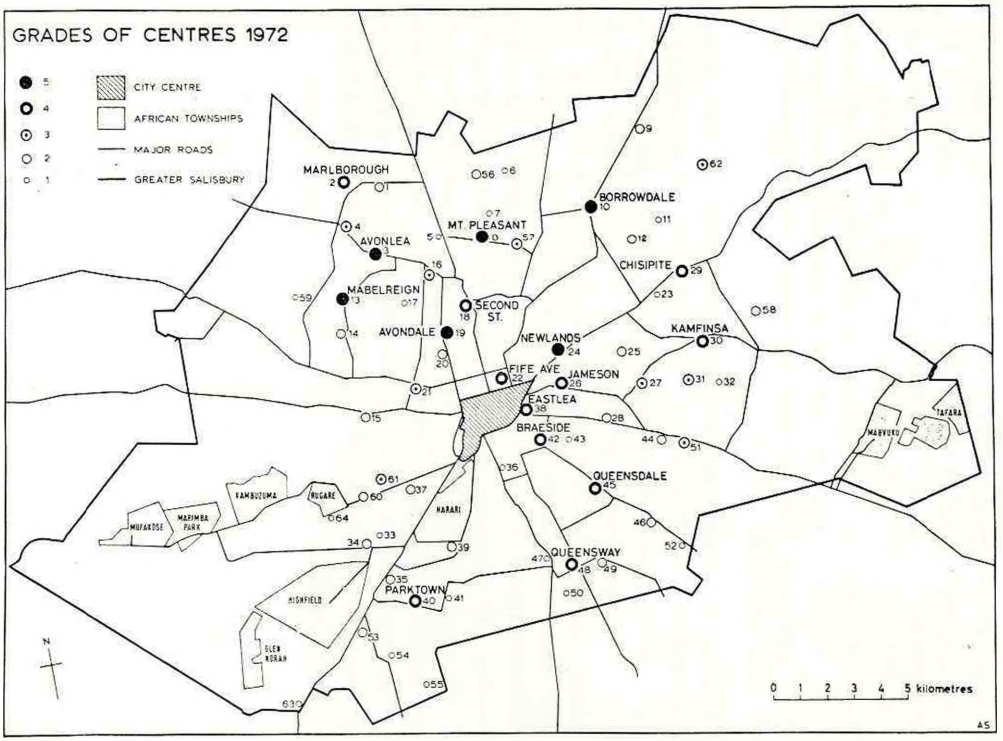

Fig. 2.4 Grades of centres 1972

Table 2.3 Functional scores of centres in Grades 5, 4 and 3 for 1968, 1972 and 1974

1968		1972		1974	
GRADE 5					
Newlands	203	Newlands	205	Avondale	273
Avondale	145	Avondale	180	Newlands	260
Mabelreign	129	Mabelreign	158	Mabelreign	192
Borrowdale	96	Borrowdale	140	Borrowdale	163
		Mount Pleasant	112	Kamfinsa	152
		Avonlea	99	Chisipite	145
				Mount Pleasant	140
GRADE 4					
Mount Pleasant	57	Parktown	74	Strathaven	111
Parktown	57	Queensdale	72	Avonlea	98
Avonlea	56	Fife Avenue	71	Parktown	96
Kafinsa	47	Kamfinsa	70	Queensdale	76
Rhodesville	43	Chisipite	61	Queensway	73
Quensway	43	Second Street	59	Fife Avenue	71
Belvedere	42	Jameson	57	Braeside	70
Second Street	37	Eastlea	56	Second Street	69
		Braeside	53	Jameson	69
		Queensway	53		
		Marlborough Town	50		
GRADE 3					
Queensdale	34	Greystone Park	43	Rhodesville	63
Five Avenue	34	Rhodesville	40	Hatfield	63
Braeside	31	Beverley	37	Ballantyne Park	62
Chisipite	31	Avondale West	36	Glen Roy	56
Marlborough Town	31	Belvedere	35	Greendale	56
Southerton Ind	29	Groombridge	34	Beverley	55
Ardbennie	28	Bluff Hill	33	Belvedere	53
Avondale West	25	Greendale	33	Eastlea	52
Beverley	24	Workington	32	Marborough Town	51
Hatfield	23			Groombridge	51
Lochinvar	22			Avondale West	46
				Crowhill Road	45
				Marimba	43
				Msasa	42
				Workington	39

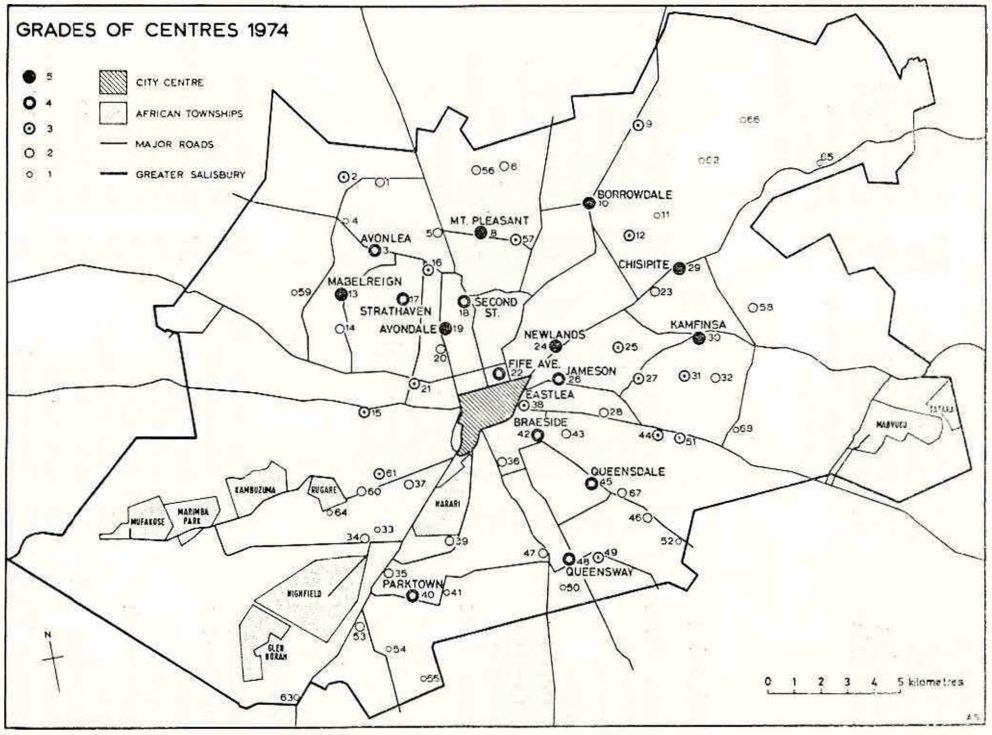

Fig. 2.5 Grades of centres 1974

Grade 4 centres are quite widely spread and in the southern suburbs are the largest centres. Normally these centres also possess a full range of the facilities recorded and thus lesser scores result from there being fewer units of each function rather than any narrowing in the range of facilities available. The Grade 4 centres of the southern suburbs thus serve the same purpose as the Grade 5 centres in the northern suburbs and differ only in the narrower choice that they offer patrons.

Grade 3 centres occur throughout the study area and are markedly different to the higher grades possessing far fewer functional units and a much narrower range of facilities which can do little more than satisfy short term, day to day demands of local householders. These centres have mainly developed in positions which accord them 'fill in' status between centres of higher grades; details of this situation are illustrated in Figure 2.5. The smaller Grade 2 and Grade 1 centres are commonly sited in the newer peripheral areas where surrounding housing development is still at an early stage, or in unfavourable locations which condemn the centres to a small service area and service population and hence little growth Figure 2.5).

Finally it should be noted that a ranking by functional score of the shopping centres now in existence does not produce an hierarchical grouping. A statistical investigation of functional scores does no more than confirm visual impressions gained from Figure 2.6; that a plot of shopping centre rank against functional score approximates very closely to an exponential curve and suggests a continuum rather than an hierarchy. The truth of this matter is of little consequence in an empirical study of this nature, especially where such a rapidly changing situation is being studied; suffice it to note that classical central place theory offers little comfort to those wishing to explain the relative sizes and spatial distribution of intra-urban central places in Greater Salisbury.

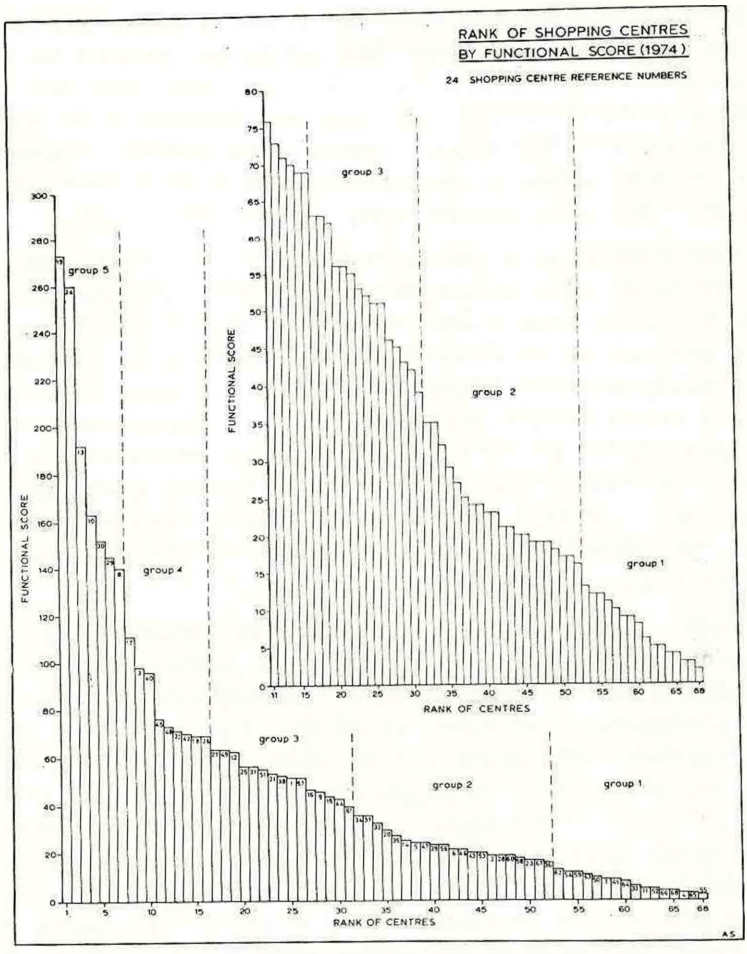

Fig. 2.6 Rank of shopping centres 1974

CHAPTER 3 CONSUMER BEHAVIOUR IN THE EUROPEAN SUBURBS

3.1 Introduction: sources of information

The relationship between patterns of commercial growth and consumer behaviour is a complex one, for it is almost impossible to determine whether major increments in shopping centre growth are a response to high levels of consumer support or a cause of it. Either way, no study of suburban commercial centres would be complete without some comment on the shopping habits of local residents. An understanding of these should form the basis of any new scheme for shopping centre development and the fact that such issues have been largely ignored in the past, is no argument for continuing this practice in the future.

This brief chapter therefore sets out to answer several related questions. To what extent is Salisbury's city centre still the main shopping location for suburban residents? Does this depend on the nature of the purchases being made, and if so what factors influence such decision making? If a suburban location is chosen for a given purchase, what influences the choice of shopping centre? Further, given some understanding of the issues which influence the choice of suburban centre, do these give rise to overall patterns of behaviour, or do shopping habits contain too high an element of irrationality to enable broad generalisations? And finally, if valid generalisations about shopping patterns may be drawn, is there any evidence to suggest that such patterns are changing?

In an attempt to answer these questions the present study relies for its data on two major questionnaire surveys and a variety of minor investigations. These latter surveys were mainly designed to assess the financial viability of specific shopping centres in a proposed new form and dealt with local catchment areas and shopping patterns. Of the larger surveys, the first was conducted by the author in November 1968 and the second by Market Research Africa in April 1972.[1] The author

[1]Market Research Africa (Pvt.) Ltd., Salisbury 1972. Shopping survey. North-eastern suburban Salisbury.

is grateful to the Commissioners of the latter survey for permission to make use of the data it includes.

Details of sampling methodology for the 1968 survey are discussed elsewhere.[2] It is sufficient to note here that 479 satisfactorily completed questionnaires were obtained from a sampling grid designed to give full coverage to the suburban areas. The questionnaire was a simple one and divided into two parts. Part A listed a range of seven purchases ranked in order of increasing price and asked that the shopping centre patronised most often for each purchase be named.

The purchases were:-

1. Small casual purchases — such as cigarettes, or extra milk, bread or sugar
2. Purchases of meat
3. Purchases of groceries
4. Minor household goods — such as stationery or lightbulbs
5. Minor items of clothing — such as socks or handkerchiefs
6. Purchases of shoes
7. Major items of clothing — such as mens trousers or ladies dresses or outfits.

The persons who made regular use of more than one shopping centre were asked to list them in order of importance up to a maximum of three and purchases made in the city centre were also recorded. The questionnaire also asked for the frequency with which each type of purchase was made in order that this parameter might be investigated as a factor affecting shopping location.

The 1972 survey involved lengthy and comprehensive in home personal interviews with 203 housewives in the northern and north-eastern suburbs. It thus concentrates on one of the more affluent sections of the city but nevertheless provides an invaluable source of data on shopping habits and patterns. It allows comparisons to be drawn with the 1968 study and therefore an assessment of current trends in consumer behaviour in the suburbs. Full details of the survey methodology are provided in the report; suffice it to note that the survey was competently designed and carried out by a reputable firm specialising in such surveys.

[2]Smout, M. A. H. 1970. Suburban shopping patterns in Greater Salisbury. *Geog. Assocn. Rhod. Proceedings* 3, pp 41-49.

3.2 The Use of suburban facilities

Of prime interest to suburban commercial property developers is the extent to which those who live in the suburbs will support their facilities. There is strong evidence to suggest that an increasing proportion of expenditure on retail goods and everyday services is accruing to the suburban centres. Some of the city centre traders view this process with alarm as they fear an absolute loss in trade, but others see the trend as a natural part of urban growth. The gradual transfer of the lower order retail and service functions from the city centre to the suburbs would lead to greater convenience for many, more efficiency in overall shopping movements and permit increased specialisation in higher order functions in the city centre. This change would be in accordance with the experience noted in more mature urban systems elsewhere in southern Africa and generally throughout western economies.

The extent to which the city centre is still the main shopping location for suburban residents depends on several factors such as distance from the centre, congestion at the centre, availability of desired goods and services at local shopping centres, their distance from the shopper and the nature and frequency of the shopping trip. Other issues related to personal preferences and habits are also relevant and may be a major influence, but they are difficult to isolate and generalise upon.

Distance of suburban residents from the city centre is an increasingly important issue and has been a major influence on choice of shopping location since the rapid expansion of the city's suburbs commencing in the 1950's. The median distance of suburban residents from the city centre is however still slight (approximately 6 kms) and other issues are in most cases considered more important. Congestion at the centre is one of these, even though by standards applied to major cities elsewhere, the centre of Salisbury suffers only slight and periodic congestion. However persons accustomed to the generous space allocations in Salisbury as a whole become impatient if car parking is not available where and when it is wanted and much of the city's population perceives the city centre as a congested area. The relative ease of parking in the suburban centres is thus one of their major attractions and one commented on frequently by questionnaire respondents who in 1972 made 97,5 percent of shopping trips by car.

Distance to the nearest shopping centre is seldom more than 1 km while distance to a Grade 5 or Grade 4 centres rarely exceeds 3 km except for a few households in the far southern and north-eastern extremities of the suburbs. The general availability of a satisfactory range of

retail goods and services has steadily improved over the last six years and is a significant influence on the choice of shopping location. The Grade 5 and Grade 4 centres are capable of satisfying all everyday needs and the necessity to visit the city centre on shopping trips is steadily decreasing. However the distance factor is also related to the nature and frequency of purchases and analysis of questionnaire replies shows that shopping patterns within Greater Salisbury conform closely to those predicted by classic economic theory; the higher the value of goods, and the lesser the frequency of their purchase, the greater the distance customers are prepared to travel to obtain them (see Table 3.1).

Table 3.1 Choice of shopping area and frequency of purchase 1968

Type of purchase*	1	2	3	4	5	6	7
Salisbury city as first choice of shopping area (%)	4,1	26,7	43,3	53,5	85,8	93,7	97,7
Frequency of purchases per month	12,4	8,1	5,8	0,9	0,8	0,3	0,5
Persons recording second choice of shopping area (%)	25,7	12,2	22,6	15,6	8,2	9,2	5,9

There is a strong negative correlation between frequency of purchase and the choice of central Salisbury as a shopping location but other important influences must also be considered. Whilst it may be possible to make the higher order purchases in the suburban centres, the range and choice of goods is far greater in the city centre. Apart from the entertainment value of comparative shopping in the city centre, this area usually offers the best value for money in the higher order purchases. However on low order goods such as groceries which are obtained with greater frequency and in greater volume, the suburban centres usually offer the same goods at the same (and sometimes even lower) prices as are charged in the city centre. With regard to the lower order purchases the suburban centres therefore compete effectively with shops in the city centre.

(* The types of purchase numbered above are those listed in section 3.1)
(The central shopping area of the city is clearly defined through zoning and spatially distinct from other commercial zones)

Table 3.2 Proportion of purchases made in central Salisbury 1972

	%
Sports and recreation equipment	97.6
Furniture	94,5
Men's clothing	93,0
Electrical appliances	91,7
Footwear	85,0
Women's clothing	82,3
Hardware	75,5
Stationery and reading materials	49,9
Hairdressers	48,7
Medicinal supplies	38,4
Alcoholic beverages	38,2
Smoking requisites	30,1
Fresh vegetables and fruit	26,9
Groceries	23,5
Fresh meat	18,4

Direct comparisons are possible for only a few categories of purchase but some general assessment of change in the 1968/72 period is feasible. Items of clothing are still purchased to a very great extent in the city centre (there are very few good clothing shops in the suburbs) although 15 percent of footwear would now appear to be purchased in the suburbs. Only a slight change is noted for such goods as stationery and reading materials in contrast to the major shift for groceries. The 1968 study showed 43,3 percent of grocery purchases made in the city centre while in 1972 this proportion had dropped to 23,5 percent. Admittedly the latter figure represents the more affluent, more mobile and better serviced northern and eastern suburbs but it is nevertheless a major change for there was little evidence of variation between suburbs in the 1968 figures. This shift affects the main monthly expenditure on retail goods for almost all families and redirects a considerable sum of money into suburban tills. It is estimated that in 1972 the 2038 households of the Mount Pleasant suburb spent $5,54 million on retail goods and of this some $2,5 million was spent on groceries. A 20 percent shift in location of shopping area thus means in this case an extra half million dollars into the suburban shopping centres. If this change is equally applicable about the suburbs, and there is little reason to doubt it, then a very major change in expenditure patterns has taken place in the last few years. A similar but lesser

shift is noted with meat purchases, from 26,7 percent in 1968 to 18,4 percent in 1972. The later survey also noted that 28,6 percent of suburban housewives are in paid employment — mostly in the city centre — and these persons have presumably a greater tendency to shop in central Salisbury.

The cause and effect relationship between improved suburban commercial facilities and increased use of them remains difficult to unravel. It is however clear that suburban residents in Salisbury are supporting their local shopping centres to an increasing extent and thus such facilities may be expected to continue growing. The choice of shopping location within the suburbs is however a separate and complex issue and is dealt with in the next section. It is such choices which ultimately determine the fortunes of the city's 68 shopping centres, the majority of which are thriving whilst some are mostly empty and derelict.

3.3 **Suburban shopping patterns**

Shopping patterns within the suburbs are highly complex and often appear irrational to the researcher. There is a wide range of influences on shopping behaviour and each affects the individual shopper to a varying degree. Housewives often travel considerable distances through the suburbs to a shopping centre of their choice passing several comparable centres en route which other shoppers may consider superior to the one visited. Before noting the spatial patterns which result from a multitude of individual choices with regard to shopping location, the influences on such choices must be examined.

A major influence on choice of shopping location is clearly the size of centre patronised and its range of retail and service functions. Those centres with the higher functional rank gain the greater trade although one should note that choice between two centres of different functional grade depends to some extent on the nature of the shopping trip. If the trip is for minor 'top up' purchases and involves only slight expenditure then in all probability the smaller centre will be chosen if it is closest to the shopper. If however a Grade 5 centre is the nearest then it will be patronised for the full range of suburban shopping trips.

As noted earlier, the white population of Salisbury's suburbs is relatively affluent and this factor combined with the very low overall densities of development has resulted in a very mobile population; with average car ownership in the northern suburbs at 1,99 per household few persons consider the costs of individual intra-suburban shopping trips. Thus in any assessment of the relative attracting power of

competing centres the distance component has a much lesser effect than might normally be expected; the difference between a 5 km and an 8 km trip being negligible. Many questionnaire respondents noted that distance is only a minor factor in choice of shopping area.

Related to car ownership are considerations of car parking facilities but apart from Saturday mornings there is usualy ample free parking at the suburban centres. The relative availability of parking facilities therefore constitutes only a minor influence on the choice of shopping location. The direction in which a shopping centre lies would however appear to be a major consideration as shopping trips are often combined with travel for other reasons. The total lack of a bus service in many parts of the suburbs means that many parents take their children to school in the morning (often done by father on the way to work) and collect them in the afternoon. Thus the location of a school may influence shopping patterns. Similarly, regular visits to friends or relations may define a direction of movement which strongly influences the choice of shopping centre.

Another significant factor is advertising and consequent variations in price as perceived by the shopper. The relatively large number of suburban centres (68 in 1974) which serve some 25 000 suburban families are in close competition with one another and by means of radio, televison, the press and locally distributed handbills are constantly trying to attract customers with 'special offers' and other supposed enticements. A study of price variations conducted in December 1969 showed that considerable variations do occur but that variation is a function of size of retail outlet rather than the functional grade of a centre or its position in the suburbs. For a given 'basket' of groceries and household goods, prices were obtained according to location, grade of centre and size of outlet. Only the latter showed any correlation with prices as is seen in Table 3.3.

Table 3.3 **Basket prices for types of retail outlet 1969**

Type of outlet	Average basket price	
	cents	index
Large supermarkets	805,0	100
Medium supermarkets	819,0	102
Small supermarkets	845,5	105
General food stores	870,6	108

Finally, the frequency with which a particular purchase is made should be noted as a further major influence on choice of shopping area even though frequency itself is clearly tied to type of purchase. The 1968 questionnaire survey asked persons to name their first choice of shopping area for a stated range of purchases (Table 3,2) and permitted the mapping of shopping centre catchment areas. While the shapes and extent of such areas clearly reflect the irregular form of the residential areas and attendant road network, the influence of the frequency of shopping trip is obvious. Small casual purhases are made the most frequently and as all centres can satisfy this need the nearest is patronised thus giving rise to numerous small service areas which are reasonably regular in shape. As purchases higher in the range are considered, a smaller number of larger service areas is established, for persons will travel further if frequency is reduced; and as service areas get bigger they become more irregular in shape. Figure 3.1 which shows shopping centre catchment areas for grocery purchases in 1968 illustrates this point. The subsequent drawing of similar such maps has not been attempted, mainly because of the considerable and rapid change in functional scores of centres that is taking place. If the catchment area of a particular centre is required for an applied study, an updated resurvey is always carried out and then the large scale generalisations shown on Figure 3.1 are of academic rather than practical value.

Of greater relevance to the property developer and town planner is an understanding of the factors which may influence the choice of shopping location for a given section of the suburbs, so that proposed changes in the existing network of centres may be more accurately assessed. Looking to the future, a continuation of the present trend in the increasing use of suburban shopping centres is predicted. However this use is likely to be confined to the relatively lower order, high frequency purchases such as household goods and groceries. It is not imagined that the higher value consumer durables will to any significant extent be purchased in the suburban centres in the near future. Shopping centres are likely to develop mainly through the addition of further units of existing facilities and the modernisation and enlargement of old ones, rather than the introduction of new and more specialised functions. In time a fuller range of retail and service facilities will be available in the lower grade centres which will then compete more effectively for the considerable sums of money spent in the suburban commercial centres. If the trends discussed above do continue, the city centre will

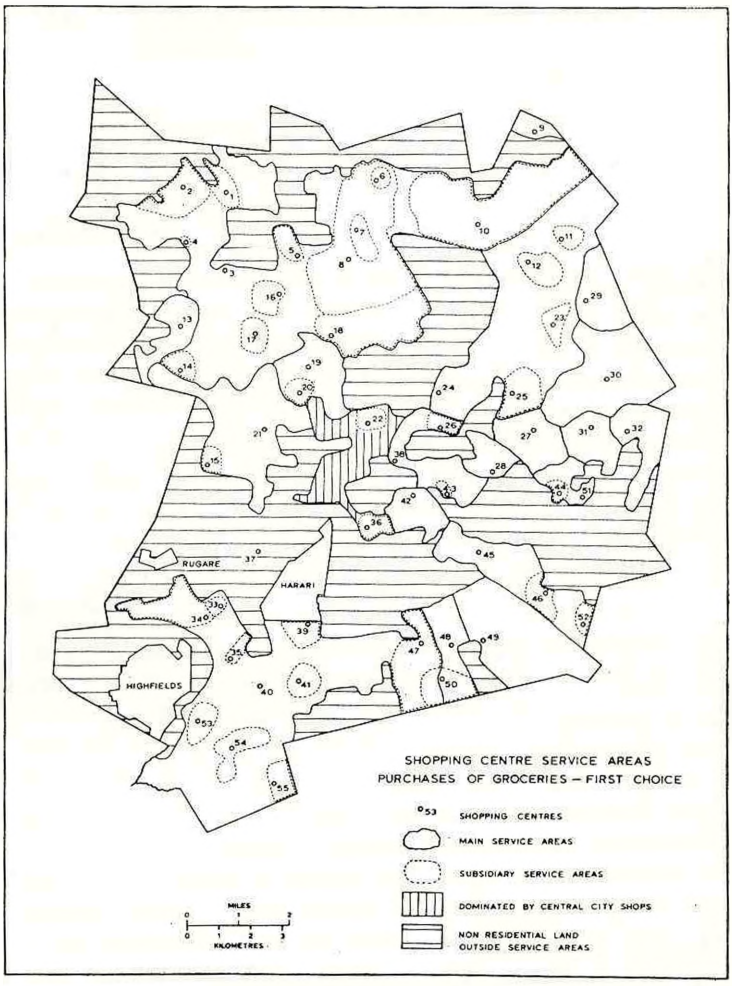

Fig. 3.1 Shopping for groceries 1968

slowly shed the major portion of its lower order retail and service facilities and assume a maturity of commercial development more in keeping with the central business district of a capital city.

CHAPTER 4 FUTURE DEVELOPMENTS IN THE EUROPEAN SUBURBS

4.1 Existing trends

Any prediction of the possible future developments of suburban shopping centres in Salisbury must depend on one of two alternative courses of events. On the one hand prediction may be related to a continuation of current trends in a free market economy, where most developments are largely speculative and based on hope rather than serious investigations of financial viability and desirability. In this situation urban administrators exert little influence on the course of events and the various sections of the market are left to find their own level. Many persons advocate this approach and claim that free enterprise should remain unfettered and be left to provide a range of shops and services as it senses demand and sees fit.

On the other hand there are persons who view the uncontrolled development of suburban commercial centres with considerable dismay. The pattern which evolves from free market development is seldom ideal from any viewpoint and much wastage of money and materials often results. Those who advocate a tighter control of shopping centre development maintain that a better possible use of resources and space could be achieved and greater convenience afforded the individual shopper, if the relevant urban authorities were to guide development according to a definite policy. It is of course policy that is lacking and development of the suburban centres has taken its current form more through the lack of official decisions than because of them; and the lack of decisions has been through default rather than with conscious objectives in view. Prediction as to future developments thus takes two forms; that based on current trends and that based on a suggested policy for growth and shopping decentralisation. The latter is dealt with in the following section.

In broad terms the suburban centres can be expected to continue growing. Quite clearly there is a steady swing towards increasing use of the suburban centres as facilities there improve and as Salisbury residents become more accustomed to the idea of suburban shopping. In this respect both questionnaire surveys left the impression that the

persons who still patronise the city centre for most purchases and apparently feel some resistance to suburban shopping, are the older members of society and that given time their influence on the statistics will decline. Furthermore, as the city gets larger and median distance of residents from the city centre increases and as congestion at the centre worsens, shopping in the city centre will become less attractive. This will be particularly true for regular purchases of bulky goods such as groceries.

Future growth, like that to date, will not be evenly spread throughout the suburbs. The higher density and more affluent areas will claim the greatest increments in functional scores and even within particular suburbs some centres will flourish while others struggle. Many of the smaller centres are unattractive and offer only a very meagre range of facilities and in an age where people have come to expect more and more in the way of facilities, such centres may well go into decline. Unless a shopping centre possesses a certain minimum range of functions and is sited where these can obtain reasonable patronage it is not likely to be a financial success. Several of the smaller centres like Midlands (55) which is very poorly sited on the periphery of development and Bluff Hill (4) which is far too close to a major competing centre at Avonlea (3), have already suffered such a fate. Once such centres drop below a given level of patronage shops quickly go bankrupt. Shop premises may then be taken over by minor business concerns or small manufacturing units which offer a lower rent, or else shop units may stand empty and invite the attention of vandals so that a run-down, partly derelict appearance may soon appear. A recent example of over-optimistic development occurred at Glen Lorne (65) where a small but attractive centre opened in 1972 with several retail and service units supporting a medium size supermarket; the recent survey recorded only a small general food store and a ladies hairdresser with at least three quarters of the leasable floor area untenanted. The catchment area for this centre is very small and irregular in shape and any serious study of the financial viability of this centre would have pointed to its present precarious position.

To complicate the pattern of growth, some of the currently empty sites zoned for commercial uses may be developed in the coming years. These will raise competition for trade to new heights in some suburbs and unless their development is accompanied by increases in population density more centres may be reduced to a critical financial position. Another of the current trends which may affect the network of shopping centres is the increasing disparity of functional size between the

centres of Grades 5 and 4 and those of Grade 1. With a relatively dense network of shopping centres available to a highly mobile population, the attraction of the larger centres may become such that the Grade 1 centres are increasingly by-passed. If this does occur, a thinning out in the network of centres would result; a situation to be feared by some of the smaller traders but which would rationalise the existing provision of facilities and the overdense network of centres.

The two largest suburban centres, Avondale and Newlands have reached a stage of development which was unthought of six years ago and it is possible that these two centres are moving towards a new relevance in the shopping centre network; that of intra-urban regional centres. Neither centre would qualify for this classification by American size standards but both offer a wide range of retailing and services and Avondale currently boasts two cinemas, a theatre and a night club. Certainly residents in the vicinity of Avondale or Newlands need only visit the city centre for high order purchases and service functions. Both of these centres have functional scores well in excess of the next largest centre (Mabelreign) and may soon possess an increased range of functions which reach well beyond everyday needs. There are early indications of this trend at present and shops in both these centres carry a far wider range of goods, especially those of high quality, than similar types of shops in other centres. Here a shortcoming of the functional classification becomes apparent for the quality of a shop and its goods is very difficult to assess, quantify and classify and thus similarly classified retailers may differ quite considerably in terms of areal size, quality of stock and attractiveness of premises. Nevertheless the evidence suggests that Avondale and Newlands may soon take on a new significance in the network of central places in Salisbury.

A further issue to be considered is that of the redevelopment of commercial premises in the suburbs. To date most expansion has been sited on virgin land but this is now rare and in several of the larger centres there is no further commercially zoned land available. In most cases houses abut the shopping centres so that lateral extensions to the commercial zone are most unlikely whilst coverage and bulk factors determine the height and volume of buildings relative to the size of the plot they occupy. This situation has caused major increases in land values in the more successful centres and as a result the consolidation and redevelopment of sites is now being considered in several cases. The replacement of a series of small adjacent shop buildings by a single structure with a planned layout and variety of shops could do much to

improve facilities in some of the centres and enhance their attractive power. Site redevelopment is expected to become a significant feature of shopping centre growth in the next few years.

4.2 Regulated growth

If developments in the network of suburban centres are to be regulated in any manner then a clear policy must first be formulated. Decisions need to be made as to the degree of shopping decentralisation that is desired in the city and the nature and range of facilities that should be provided in the suburban centres. If a particular level of provision of facilities is decided upon then correspondingly the overall volume of business is determined by population and income levels. At this point the spatial location of centres becomes an issue and the question arises as to the number and relative sizes of suburban centres that best can provide the desired facilities. Clearly different centres are required to fulfil different functions; some need only satisfy the simplest of shopping needs whilst others must provide a wide range of facilities. To the planner a well ordered hierarchy of centres, spatially located according to the realities of population distribution and densities within the suburbs, would seem the obvious answer.

However the realities of an existing network of 68 centres must also be faced and quite clearly the pattern suggested above is not possible. It should however be feasible to regulate the levels of growth of existing centres so as to obtain a more efficient central place system in Greater Salisbury. Firstly the pattern of undeveloped commercial sites should be carefully examined with a view to dezoning where necessary, in order to obviate growth where it might upset established centres. Secondly, zoning legislation could be used in such a manner as to discourage growth in certain areas and encourage it in others, in order that the distribution of different levels of centre might provide a greater convenience to suburban shoppers. Unbalanced growth as has occurred in the last few years means over-competition between shops and centres in some suburbs and a relative lack of facilities in other areas, so that both traders and customers must suffer.

The timing of extensions to existing facilities or the development of new centres should also be carefully regulated. Developments like that at Glen Lorne (65) mentioned in the previous section suffer largely because of premature establishment. Once a centre has experienced decline it is very difficult for it to subsequently attract a higher level of customers even when nearby population levels may have risen con-

siderably. The Rolfe Valley centre (11) is another example of this situation. Further, the nature and variety of shops within centres might be planned for the general benefit of traders and customers alike. Numerous shopping centres possess an unnecessary duplication of one facility often to the exclusion of another; such as five butchers' shops and no bakery. Careful planning guidance could avoid such situations.

In general terms however the realities of urban administration and planning in Salisbury must be faced and the network of commercial centres is expected to continue developing with little guidance. In a rapidly growing Third World capital city in which finances and qualified personnel are equally in short supply, there are more pressing problems.

CHAPTER 5 COMMERCIAL GROWTH AND CONSUMER BEHAVIOUR IN THE AFRICAN TOWNSHIPS

5.1 Introduction

Following the 1968 study of shopping centres in the European suburbs a similar survey was conducted in 1969 in Harare and Highfields, the two major townships of Greater Salisbury[1]. The study had two main aims; firstly to provide an explanatory description of retail and service facilities available in the townships and secondly to determine the extent to which their populations rely on the centre of Salisbury for such facilities. Restrictions of time and cost made a survey of all ten African townships that serve Salisbury impossible, but the two chosen for the 1969 study are the largest and form good representative examples. The 1974 study was further limited owing to a shortage of time and money and covers only Harare, but changes noted there over the five year period may be taken as generally applicable to the other townships. It is widely considered that while minor variations in shopping patterns occur between townships owing to their differing commercial facilities and access to the city centre, they all exhibit the same basic shopping patterns.

From their outset the African townships have evolved essentially as residential areas for Africans employed within Salisbury and its suburbs. Although a few light industrial sites are provided in some of the townships, few are developed, so that the townships provide minimal employment and remain little more than dormitory suburbs. The vast majority of their working populations thus travel daily between the townships and the European areas and have opportunities to make purchases in both.

Harare, population 60 000, is situated 3 kms south of the city centre and possesses two main commercial centres, Magaba and Matapi, and several minor clusters of shops located in or adjacent to the residential

[1]Smout, M. A. H. 1971. Shopping centres and shopping patterns in two African townships of Greater Salisbury. *Zambezia* 2, I, pp 33-39.

neighbourhoods. Being close to the main commercial core of the city, Harare contrasts with the other African townships which are all further removed.

The shopping centres of the African townships provide a similar range of facilities to those in centres of comparable size in the non-African residential areas, but differ markedly in aspect. Few buildings of more than one storey occur in the township shopping centres and whilst planning regulations stipulate minimum building values, there is little control over the layout and appearance of premises. Numerous shop buildings are sub-divided so as to provide as many rent payers as possible, often resulting in premises which are too small to permit efficient business operations. Building lines vary and as a consequence pedestrian accesses are normally unpaved and irregular in shape. Little attempt is made to keep the shops or their surrounds looking tidy and the shopping centres are generally shoddy in appearance reflecting clearly the haphazard manner in which development has taken place.

5.2 Commercial facilities and commercial growth

There are seven clusters of shops in Harare ranging from small centres like Bassopo with only three shops to centres like Matapi and Magaba at the other end of the scale with 48 and 41 retail and service functions respectively. The positions of each of these centres are shown on Figure 5.1 and it is clear that the larger centres are those nearest the city centre and at the main bus station and market. Magaba is not only nearest the city centre and passed daily by many pedestrian commuters but is surrounded by one of the highest density residential areas in the township — that of the single mens quarters where nearly 12 000 men are housed in 24 blocks of single room dwellings.

The range of shops and services available in the centres is shown in Table 5.1. Most shop units are small and cramped and like the small range of low cost goods they contain, are a reflection of the limited purchasing power of township residents. Many of the 'general retail' shops operate under a general dealer's licence and are in effect multi-functional units. These shops often house watch repairers or clothes menders seated behind small tables in the shop who offer their services on a 'while you wait' basis. A small portion of the shop may accommodate a hairdresser and not infrequently minor car repairs are attempted in a back yard. Goods on the shelves range from food and items of clothing to household hardware and bicycle spares while

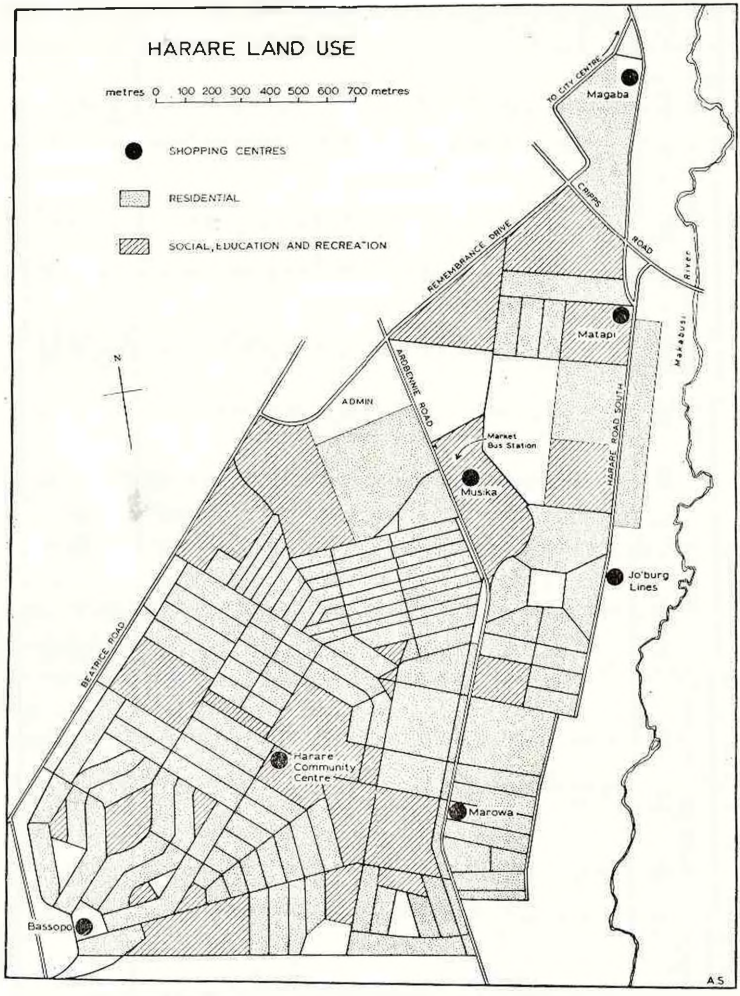

Fig. 5.1 Land use and shopping centres in Harari

numerous oddities hang suspended on walls and from ceilings. Retail clothing shops represent a degree of specialisation and possess a wider range of higher quality goods than those in the general retail outlets. The title of butcher's shop is self explanatory, though here again the low purchasing power of the township residents is reflected in the cheap cuts available. Elsewhere in the city there would be no market for the animal heads and offal which are commonly sold by township butchers. The grocers shop also represents specialisation when compared with

Table 5.1 Functions recorded in Harare Shopping Centre in 1969 and 1974

	Matapi		Magaba		Harare C.C.		Musika		Marowa		Burg Lines		Bassopo		All Centres	
	69	74	69	74	69	74	69	74	69	74	69	74	69	74	69	74
General retail	7	9	8	4	11	11	4	4	11	10	5	6	2	2	48	46
Clothing	2	1	13	18	0	0	0	1	0	0	0	0	0	0	15	20
Butchery	–	2	3	4	2	2	2	2	2	2	1	1	1	1	11	14
Dry Cleaning depot	8	8	4	1	1	2	1	0	0	1	3	2	0	0	17	14
Grocers	10	7	1	3	0	0	1	1	0	0	0	0	0	0	12	11
Eating house	2	3	3	4	2	0	3	2	0	0	1	1	0	0	11	10
Hairdressers	2	4	2	0	0	1	1	1	0	0	0	1	0	0	5	7
Shoe Sales and Repairs	0	0	1	1	1	2	0	0	1	1	2	0	0	0	5	4
Furniture store	0	3	1	1	0	0	0	0	0	0	0	0	0	0	1	4
Chemist	1	0	1	1	1	1	0	0	0	0	1	1	0	0	4	3
Bottle Store	0	0	1	1	0	0	1	1	0	0	0	0	0	0	2	2
Bank	0	0	0	0	2	2	0	1	0	0	0	0	0	0	2	3
Sports pool — tote	0	1	1	1	0	0	0	0	0	0	0	0	0	0	1	2
Electrical goods	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0	2
Service station	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	2
Surgeries and clinics	1	4	4	1	0	2	0	0	0	0	0	0	0	0	5	7
Beer garden	1	0	1	0	1	0	1	1	0	0	0	0	0	0	4	1
Others	2	3	0	0	1	0	1	0	0	0	0	0	0	0	4	3
TOTAL UNITS	36	48	44	41	22	23	15	14	14	14	13	12	3	3	147	155
RANGE OF UNITS	10	13	14	13	9	8	9	9	3	4	6	6	2	2	16	18
RANK	2	1	1	2	3	3	4	4=	5	4=	6	6	7	7		

the general retailer and as with the clothing shop a wider range of better quality goods is associated with the specialist grocer. Furniture shops retail both new and second hand goods and often much of the stock is manufactured in some nearby yard of timber salvaged from waste collected in a more affluent part of the city. Chemist's shops sell the normal range of pharmaceutical products alongside a fascinating array of tribal medicants. Regrettably there is no dispensing chemist in Harare and prescriptions have to be made up at the Harare hospital which is sited some 2 kms to the west of the township. The remainder of the functions listed in Table 5.1 are self explanatory and with the exception of the 'Beer garden' require no additional comment. African beer is more of a food than an alcoholic beverage and beer drinking is very much part of traditional social custom. Beer gardens are therefore considerable centres of attraction and a major drawcard in a shopping centre.

A comparison both of the overall range of retail and service functions recorded and of the number and range of these in each centre for the 1969 and 1974 surveys shows surprisingly little change — certainly less than the township administrators and African retailers would like to acknowledge. The total population of Harare has increased slightly (by 2 000) between 1969 and 74 notwithstanding the demolition of a block of very old and derelict dwellings known locally as 'Old Bricks' and furthermore the purchasing power of the African population has increased quite considerably during this period. Certainly it was expected in 1969 that a significant increase in retail and service facilities in the townships would occur by 1974. The earlier survey also recorded the intention of township authorities and shop owners to capture a much greater share of the trade generated in the township for it was well known at that time, that many township residents bypass their local African owned shops in favour of those in the city centre run by Asian and European traders. The reasons behind such behaviour are discussed in section 5.3; suffice it to note that the 1969-74 period witnessed practically no change in the range and number of retail and service functions in the Harare shopping centres.

5.3 Shopping patterns

In both the 1969 and 1974 surveys questionnaires were posed to township residents which were aimed at ascertaining where a range of goods is purchased and the reasons behind each choice of shopping location. The detailed methodology of these two surveys is described

elsewhere.[2] In this context it is sufficient to note that the 1969 survey involved some 2 000 postal questionnaires filled in by township householders while the more recent study involved just over 500 interviews with persons in Harare shopping centres, householders in the township, persons at the main bus station in Harare and also at the Market Square adjacent to the African bus station in Central Salisbury.

Table 5.2 shows in summary form the results of both surveys and again very little change except for meat purchases is noted in the five year study period; this might well be expected with little change in shopping facilities in Harare. In both studies the relatively low cost high frequency purchases for small items such as a loaf of bread or a few vegetables are made almost exclusively in the township. However with more costly purchases such as groceries a much higher proportion is bought in the city centre. With the high cost low frequency purchases such as clothing and shoes very few items are purchased in the townships.

The reasoning behind such shopping behaviour was carefully sounded in the latter half of questionnaires and the results of the 1974 survey which was the more detailed are shown in Table 5.3 When noting the

Table 5.2 **Choice of Shopping Area for Harare Residents (Percent)**

Type of purchase	Harare Shops		1974	
	1969	1974	City Centre	Elsewhere or No Purchase
Small regular purchases e.g. milk, bread	93	89	6	5
Main vegetables	95	91	2	7
Main groceries	52	58	37	5
Main meat	48	75	13	12
Small items Clothing	14	10	92	5
Shoes	4	3	84	6
Large items Clothing	2	5	91	4

[2]Smout, M. A. H. 1971 ibid
Hardwick, P. A. Additional data on shopping and expenditure patterns obtained from research in progress.

Table 5.3 Influences upon choice of Shopping Area by Africans

Commodities	% of response for each commodity						Total
	Convenience	Price	Service	Choice	Quality	Credit Availability	
Small Items — milk, bread etc.	88	4	3	2	2	1	100
Main Groceries	49	34	8	6	3	0	100
Main vegetables	74	14	3	3	6	0	100
Main meat	76	7	3	4	10	0	100
Pharmaceuticals	43	7	6	41	3	0	100
Shoe repairs	33	13	32	10	10	2	100
Shoe purchases	8	7	6	29	29	21	100
Small items clothing	11	16	5	20	27	21	100
Large items clothing	6	10	6	19	32	27	100
Electrical goods	9	7	7	23	21	33	100
Furniture	3	7	9	11	19	51	100

influences upon choice of shopping area one should bear in mind the availability of the items concerned. Clearly the items at the top of the list in Table 5.3 are available in all shopping locations, whilst furniture and electrical goods for example, are only available at the larger centres in Harare and in the city centre. With small items like milk and vegetables 'convenience', is the dominant influence on shopping location. This might well be expected with regular purchases of goods which are readily available and for which price variations are least, whilst quality and choice is fairly standard at all locations. With purchases which are made more seldom and which involve a greater outlay of cash, a different range of influences on shopping location is noted. Goods such as shoes, clothes, furniture and electrical appliances are affected mainly by the range of choice, the quality of goods and the availability of credit. This latter issue is clearly important to persons on very low salaries who wish to acquire relatively expensive articles such as radiograms and lounge suites. The best choice of goods is available in the city centre and it is only here that credit is available. In the township shops only a minimal range of the medium and high price consumer durables is normally stocked. The choice of shopping location is also a function of the frequency of purchase, although this factor is hard to isolate from the other influences on shopping location. In general terms, however, the higher the price of the item and the lower its frequency of purchase the greater the likelihood of the purchaser being prepared to travel the slightly greater distance to the city centre.

It is interesting to note that price is given as a major influence on shopping location only in the case of grocery purchases and a further investigation was conducted in order to assess the variation in prices of grocery items both within the township and between it and that part of the city centre adjacent to Harare and known as the Kopje grid. Table 5.4 illustrates the findings of the price variations survey and shows that while the Kopje grid provides the lowest priced groceries there is little difference between it and the main supermarkets in the two largest of the township shopping centres, Matapi and Magaba. The smaller township centres price their goods approximately 20 per cent higher than the Kopje area and numerous interviewees noted that this is a major influence on choice of shopping area. In general, the smaller the shopping centre and/or the smaller the retail outlet, the higher the price.

In the use of local shopping facilities there is a marked contrast between the African and European populations of the city's suburban

Table 5.4 Variation in Price Levels for Grocery items

Items in sample basket	Shopping Centres								
	Kopje Grid	Bassopo	Jo'burg Lines	Marowa	Matapi General Stores	Harare Community Centre	Magaba General Stores	Matapi & Magaba Super-markets	Musika
Eggs	100	145,5	145,5	145,5	145,5	145,5	106,1	106,1	145,5
Surf detergent	100	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0
Lux soap	100	118,8	118,8	118,8	118,8	109,4	106,3	100,0	109,4
Lifebuoy soap	100	120,0	120,0	120,0	120,0	120,0	100,0	100,0	100,0
Tanganda Tea	100	120,0	120,0	133,3	120,0	116,7	133,3	106,7	116,7
Stork Margarine	100	138,5	138,5	138,5	138,5	138,5	134,6	100,0	138,5
White Sugar	100	104,8	104,8	104,8	104,8	104,8	100,0	100,0	104,8
Mealie Meal	100	117,2	117,2	115,6	117,2	117,2	109,4	109,4	109,4
Rice	100	142,9	142,9	135,7	135,7	128,6	121,4	100,0	125,0
Ration meat*	100	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0
Mean price level	100	120,8	120,8	120,5	119,9	118,1	110,5	102,7	116,1

*('Ration Meat' — the less desirable, cheaper cuts often issued to African domestic servants as part of their food rations)

areas. The African population is heavily dependent on facilities available in the city centre and this situation would appear to be static. In general only small low cost purchases are made in the African townships and as the cost of goods increases so a greater proportion of the African population shops in the city centre. In consequence the African traders in Harare gain only a small proportion of the total trade emanating from the township; a situation which results from small, crowded, under-capitalised shops usually owned by inexperienced traders and staffed by untrained personnel.

This heavy dependency of Harare residents on the Kopje shopping area for much of their requirements is viewed unhappily by both the African traders and the city authorities alike. The former see themselves loosing good business whilst the latter are faced with the problems associated with the mass movement of people; and this applies to all the townships and not just Harare. Quite clearly a major improvement of retail and service facilities in the townships would be to the general benefit of all. It would result in far more cash circulating in the 'African' sector of the economy, lower the transport costs of many families and ease the strain on an already crowded public transport system.

As noted in the 1969 survey the low capital base from which most African traders start would appear to be at the root of the problem. Most traders are required to sink the majority of their capital into the erection of trading premises or else start from too low a capital base so that little money remains with which to acquire adequate stocks and run an efficient business. Shops could be improved in size, appearance and functional efficiency if those running them were able to use their funds in operating a business rather than building premises. The provision of modern spacious shop and office premises which could be rented out at reasonable rates might greatly improve shopping facilities. The problem remains however as to who should provide such facilities. The Municipality is reluctant to enter the field of commercial property development in the townships whilst European property developers are not permitted to operate there. (Although the policy is currently under review, existing legislation is aimed at securing for the Africans sole trading rights in African areas).

Both the 1969 and 1974 surveys queried township residents about their desire for new and additional facilities in the township shopping centres and a number of issues were repeatedly mentioned. There exists for example a strong demand for a dispensing chemist; there are several

retailers which stock patent medicines but as yet no provision within the township for the making up of a doctor's prescription. The 1969 survey also recorded the desire of many residents for a large modern supermarket operating on the self service principle and many persons commented that there were too many small shops (general food shops totalled 44 in Harare in 1969) with a restricted range of goods.

Inherent in the desire for a supermarket were the benefits seen to accrue from a wide range of goods under one roof where customers may easily compare items before purchase. By 1974 this desire was partly satisfied with two new supermarkets in Matapi and Magaba but both of these units are relatively small and their range and quality of goods and general layout and appearance does not compare favourably with similar sized outlets in the Kopje area of the city centre. Further, requirements of a bakery, 'bottle' store and credit stores selling furniture and clothing are evidence of the desire for development of specialist retail outlets in the township similar to those patronised in the city centre.

Unfortunately little development is taking place in the township shopping centres at present and there is considerable evidence to suggest that these centres gain an ever decreasing share of township trade as African wage levels rise and a greater proportion of family expenditure is on consumer durables such as furniture, clothing, transistor radios and bicycles. Only a major injection of capital into the township shopping centres to vastly improve the range of retail outlets and services is likely to change the current situation; and existing legislation which prevents European traders from investing in the townships and which is intended to aid the African trader, is the main stumbling block to such development.

APPENDIX A FUNCTIONAL SCORES AND RANKS OF SHOPPING CENTRES

No.	Name	Scores				Ranks			
		68	70	72	74	68	70	72	74
1	Marlborough	13	19	22	19	28=	32=	40=	46=
2	Marlborough Town	31	37	50	51	15=	16=	17	25=
3	Avonlea	56	70	99	98	7	6	6	9
4	Bluff Hill	4	4	33	3	46	57=	24=	66=
5	Ashbrittle	5	12	15	24	41=	43=	49=	38=
6	Northwood	5	13	18	21	41=	39=	46	42=
7	Quorn Avenue	6	6	7	9	40=	53=	58=	58=
8	Mount Pleasant	57	79	112	140	5=	5	5	7
9	Crowhill Road	14	14	26	45	26	37=	34=	28=
10	Borrowdale	96	109	140	163	4	4	4	4
11	Rolfe Valley	5	5	12	5	41=	55=	52=	62=
12	Ballantyne Park	2	18	21	62	51	34=	41=	19
13	Mabelreign	129	132	158	192	3	3	3	3
14	Meyrick Park	13	13	28	25	28=	39=	29=	37
15	Marimba	14	32	29	43	26=	21	28	29
16	Avondale West	25	27	36	46	19	25=	21	27
17	Strathaven	5	12	17	111	41=	43=	47	8
18	Second Street	37	54	59	69	12	8=	12	15=
19	Avondale	145	147	180	273	2	2	2	1
20	Kensington	7	10	26	29	37=	47	34=	35
21	Belvedere	42	45	35	53	11=	13	22	23
22	Fife Avenue	34	48	71	71	13=	11	9	13
23	Lewisam	13	13	16	17	28=	39=	48	50=
24	Newlands	203	213	205	260	1	1	1	2
25	Glen Roy	17	23	28	56	23=	29	29=	20=
26	Jameson	16	45	57	69	25	13=	13	15=
27	Rhodesville	43	41	40	63	9	15	19	17
28	Clyde	13	19	24	19	28=	32=	37=	46=
29	Chisipite	31	46	61	145	15=	12	11	6
30	Kamfinsa	47	54	70	152	8	8=	10	5
31	Greendale	12	33	33	56	33=	19=	24=	20=
32	Athlone	9	9	11	32	35=	48=	54=	34
33	Southerton	4	4	7	6	46=	57=	58=	61=
34	Lochinvar	22	22	30	35	22	30	27	32=

APPENDIX A CONTINUED

No.	Name	Scores				Ranks			
		68	70	72	74	68	70	72	74
35	Houghton Park	7	11	27	27	37=	46	33	36
36	Arcadia	5	6	11	16	41=	53=	54=	52
37	Southerton Ind.	29	29	24	35	18=	24	37=	32=
38	Eastlea	3	20	56	52	–	31	14	24
39	Ardbennie	28	35	28	23	18	27	29=	40=
40	Parktown	57	67	74	96	5=	7	7	10
41	Montgomery Drive	3	3	7	9	49=	61=	58=	58=
42	Braeside	31	33	53	70	15=	19=	15=	14
43	Hillside	2	4	4	20	51=	57=	63	44=
44	Msasa Road	4	8	23	42	46=	50=	39	30
45	Queensdale	34	37	72	76	13=	16=	8	11
46	St. Patrick's Rd.	17	17	21	21	23=	36	41=	42=
47	Caledon	13	13	15	24	28=	39=	49=	38=
48	Queensway	43	51	53	73	10	10	15=	12
49	Hatfield	23	27	28	63	21	25=	29=	17
50	Logan Park	7	5	12	10	37=	55=	52=	57
51	Beverley	24	37	37	55	20	16=	20	22
52	Park Meadowlands	2	3	6	5	51=	61=	61=	62=
53	Tait Crescent	12	12	20	20	33=	43=	44=	44=
54	Cheviot	11	9	13	12	35=	48=	51=	54=
55	Midlands	3	14	11	2	49=	37=	54=	68
56	Pendennis Road	–	4	21	23	–	57=	41=	40=
57	Groombridge	–	31	34	51	–	22=	23	25=
58	Mandara	–	8	20	18	–	50=	44=	49
59	Ashdown Park	–	24	8	12	–	28=	57	54=
60	Lytton Road	–	18	25	19	–	34=	36	46=
61	Workington	–	31	32	39	–	22=	26	31
62	Greystone Park	–	7	43	13	–	52	18	53
63	Lyndale	–	–	6	11	–	–	61=	56
64	Cedrella	–	–	2	8	–	–	64	60
65	Glen Lorne	–	–	–	3	–	–	–	66=
66	Helensvale	–	–	–	4	–	–	–	64=
67	Chadcombe	–	–	–	17	–	–	–	50=
68	Cleveland	–	–	–	4	–	–	–	64=

APPENDIX B FUNCTIONS RECORDED IN THE SHOPPING CENTRES

Food shops	Score	1968	1970	1972	1794
Baker	4	14	15	19	24
Butcher	1	65	76	81	86
General food	1	71	76	75	76
Supermarkets — large	4	3	5	5	18
Supermarket — medium	3	19	36	48	38
Supermarket — small	2	29	22	20	17
Others	4	6	11	15	32
Other shops					
General dealer — large	4	10	11	14	15
General dealer — small	2	38	36	29	30
Bottle store	3	14	18	20	14
Chemist	3	20	21	24	27
Clothing	2	26	38	37	54
Electrical	4	8	14	20	30
Florist	4	3	3	7	8
Gifts and stationery	4	15	24	20	24
Garden requisites	3	4	9	13	11
Hardware	3	16	25	35	36
Household soft goods	4	9	11	24	15
Shoes	4	7	9	9	13
Others	4	6	5	5	31
Financial Offices					
Bank branch	4	16	22	21	27
Bank agency	3	–	–	53	62
Building Society branch	5	2	4	6	11
Building Society agency	3	14	21	36	41
Insurance Company branch	5	2	3	3	2
Insurance Company agency	4	5	5	6	5
Other offices					
General business	4	10	12	9	40
Surgery	3	18	16	20	27
Estate agents	3	13	19	32	29
Others	5	4	4	4	2
Services					
Service station	1	61	69	67	77
Vehicle hire and sales	4	7	7	15	28
Dry cleaning	2	26	34	51	75
Hairdresser	2	34	41	51	64
Restaurant	4	6	12	15	17
Licensed premises	5	2	2	11	12
Shoe repair agency	4	6	7	25	38
Sports pools	1	–	–	25	30
Others	4	3	3	14	21
Social and administrative					
Clinic	5	2	2	2	4
Library	5	2	2	3	3
Police station	5	2	2	2	3
Post office branch	4	10	12	13	14
Post office agency	3	4	3	13	15
Town offices	4	4	4	6	4
Others	5	3	3	3	2