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TRENDS IN GROWTH, SPACE REQUIREMENTS AND THE LOCATION OF RETAIL AND PERSONAL SERVICE ESTABLISHMENTS IN METROPOLITAN DURBAN

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7th May, 1968.

L. Schlemmer
H.L. Watts
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I. INTRODUCTION

The present project is one of several research undertakings commissioned by the town planning consultants currently engaged by the Durban Corporation. These consultants, Lord Holford and Professor Roy Kantorowich and their team are concerned with what is known as the "Central Durban Planning Project". They are required to make recommendations for the replanning of the large strip of Durban's coastal land bounded by the Umgeni River in the North, the main northern railway line in the West, the seafront in the East, and Durban's Central Business District in the South, (of which certain areas are included in the area for replanning).

The Central Durban Planning Project staff are at present making a very intensive investigation of all types of urban growth and development both within the city and in its wider region, in order that the eventual recommendations should accord with major ecological trends and urban developments in this region.

As part of this investigation numerous research projects have been undertaken or commissioned by the planning team in order to provide the data on which their town planning decisions will eventually be based.

Partly because of the fact that part of the planning area abutts the central commercial area of the city, and partly because the rest of the area is large enough to warrant considering a varied range of activities (including commerce), as being possibly appropriate in the area, retail trade and the closely related personal service activity are important foci of attention for the planners.

The present study was accordingly planned by the Institute for Social Research in collaboration with the planning consultants to provide information on the extent to which developments in retail trade and personal services would create demands for commercial land within the project area, and otherwise influence other types of developments which might develop there.

The following were the major features of retail trade and personal services selected for investigation.

1. Current floorspace characteristics in relation to type of establishment, turnover, employment, area of location, and other variables.

2. Past trends in the location and growth of retail and service establishments of various types and sizes.

3. Probable future developments in this field, particularly as regards tempo and extent of growth, location trends, and changes in type of establishment generally.

4 The effects on retail trade and personal services of various types of locational factors and features of the surrounding ecology.

5. In particular, the short and long-term prospects of decentralisation of retail outlets and services of various types taking place, and trends in the establishment of planned centres to serve suburban markets.

II. METHODS AND DEFINITIONS.

(A) The Area of Study and its Subdivisions.

The area of study for the present investigation can be broadly defined as "greater Durban" and, as such, it corresponds to the Durban Metropolitan area as defined by the South African Bureau of Statistics, with certain additions. A map of the study area is given in Appendix D.

More precisely, the area includes the whole of the Durban Municipal area including all Non-White townships as well as Umlazi government township, Pinetown, and the dormitory towns of Amanzimtoti, Queensburgh, Isipingo, Westville, New Germany, Kloof, Hillcrest, Gillitts, Emberton, Umhlanga Rocks, La Lucia and Glenashley; and certain semi-rural areas within the Magisterial district of Pinetown, such as Mariannhill, Dassenhoek, Shallcross, Klaarwater, Clermont, and other minor areas.

For purposes of both sampling and analysis the area has been subdivided in various ways. These subdivisions are shown clearly on the map in Appendix D, but are mentioned here briefly as well to assist readers in following the text.

(1) Hard Core. This is the main and most intensively developed shopping and financial zone within the larger central business district of Durban.

(2) The "Grey Street" Area. This is the main central Indian shopping, financial and service district in Durban, abutting the predominantly White hard core. The boundary between these two areas is impossible to delineate geographically in an exact way since some degree of mutual penetration of White and Indian shops exists. Hence a certain degree of overlap in area boundaries had to be tolerated.

(3) The Beachfront. This area comprises the seafront strip to the East of the central business district of Durban and includes intensively developed flat, holiday flat, and hotel concentrations facing the main beaches of Durban. The area also contains a good deal of shopping development and services of the holiday resort type.

(4) Winder Street South. This is an area of mixed commercial, light industrial, transportation and warehousing facilities, with its Western and Southern boundaries bordering on the Point dock area of Durban. This is part of the "frame" of the central business district.

(5) Winder Street North. This zone is popularly known as "motor town" because of the large number of motor car dealers, service stations, workshops, and motor spares retailers in the area. For the rest, the area also consists of light industry, mixed commerce and government services. It is situated between the beachfront zone and the hard core. This is also part of the "frame" area of the central business district.

(6) The "Albert Park" Area. Another "frame" area within the central business district, this zone is on the opposite or Western side of the hard core and consists mainly of permanent residential flat development with a relatively light concentration of mixed trading and financial establishments. Some of the commercial development appears to be an overspill from the hard core area, while other establishments are orientated mainly towards the local residential market.

All the areas mentioned thusfar taken together represent the CENTRAL BUSINESS DISTRICT of Durban.

Major areas which have been delineated outside the central business district are the following:-

(7) Warwick Avenue. Berea and Umbilo Road Complex. This is a fairly dense concentration of racially mixed shopping facilities interspersed with light industrial development situated on the fringe of the central business district and extending in ribbon development along the major Western and Southern arterial road inlets to the central business district.

(8) Central or "Old Borough" Area. This area corresponds roughly to an earlier municipal boundary of Durban. Excluding the areas already mentioned, the central area stretches from the seafront up to the apex of the Berea ridge and extends Northwards and Southwards to meet the Umgeni and Umbilo Rivers (excluding the coastal promontory known as the Bluff). This is the area of oldest established residential development in Durban and is also characterised by considerable flat development. It can conveniently be divided into areas of higher and lower socio-economic status, corresponding closely to the degree of land elevation.

(9) Rest of the Municipal Area. This, as suggested, comprises all areas within the present municipal boundary which have not already been mentioned. This area is dispersed around the perimeter of the central area and as such is further away from the city centre and less densely populated. It is been further subdivided in some analyses into a Southern, Western, and a Northern Sector.

(10) The Periphery. This, the final major subdivision includes all the separate local authority (often dormitory) areas situated on the outskirts of the Durban municipal area. The areas included have already been mentioned earlier.

(B) Coverage and Sample Design.[1]

The sample used is a non-proportionately stratified random sample drawn from a universe consisting of municipal trade licence reprints for 1966. Constructing the sampling frame involved sorting through over 4000 reprints of municipal licenses, in order to isolate the applicable establishments and to divide them into 34 different stratification categories. The basis for stratification was: type of outlet, race of owner, geographical situation, and

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1] Full details of the sample design, fieldwork results, and weighting factors used are set out in Appendix B.

whether establishments were situated in large or small shopping clusters.

It is necessary here to distinguish briefly between the different types of establishments as they were classified for purposes of both sampling and analysis.

(1) Personal Services. These include cinemas, entertainment services, hairdressers, slimming salons, photographers, and other establishments of similar type, as well as certain small personalised manufacturing establishments like tailors and dressmakers. Also included were certain commercially orientated semi-professional establishments like ballroom dancing academies and masseurs. Professional services, hotels and boarding houses, and non-personal services were excluded.

(2) Convenience Outlets. These are establishments which cater mainly for demand purchasing of goods necessary for day-to-day living. As such the category includes grocers and provision dealers, street corner cafes, chemists, and general dealers who deal mainly in convenience goods. Restaurants were also included in this category because of the fact that most such establishments deal in convenience goods as well as providing a meal or snack service.

(3) Small Durables Outlets. In the main this category of establishments includes all retail outlets for both "impulse" and demand merchandise not required for day-to-day consumption; and where the goods retailed are generally not bulky enough to necessitate a large sales area. The list includes outfitters, florists, hardware dealers, shops selling household furnishings and crockery, etc., as well as novelty and gift shops, stationers and general dealers who trade mainly in durables.

(4) Large Durables Outlets. Included here are all shops selling bulkier durable goods requiring large sales areas like furniture dealers, vehicle sales establishments, builders' suppliers; as well as

establishments which in the strict sense do not sell durables but which nevertheless require large premises, like petrol stations and coal and coke dealers.

(5) Large Variety Stores. Large variety stores are those large department stores bearing well-known names like O.K. Bazaars, John Orrs, Woolworths, etc., as well as lesser known large variety outlets selling varied ranges of goods like Moosa's, Henwoods, and Morrisons.

Excluded from the sampling universe are all wholesalers as well as retailers where less than 25% of goods sold are to the public.[1] The study is concerned only with establishments catering mainly for the private buying public.

From each stratum subsamples were drawn, using random numbers, with the probability of selection varying according to the assessed variability within the stratum and the importance of the group of establishments in terms of the survey's objectives.

The combined total of sample cases numbered 548 establishments. Results were obtained from 446 of these. The loss in sample cases is due to the fact that 13.5% of the establishments were found to be non-existant, or otherwise unqualified for inclusion, and that 5% of the respondents approached refused to grant an interview. The high incidence of non-applicable sample cases is due to the fact that it was decided to err on the side of indusiveness in constructing the sample frame, so as to avoid any negative biases in the universe.

(c) Data-Gathering and Fieldwork Procedures.[2]

The data-gathering instruments and fieldwork procedures were pretested by means of a pilot study conducted

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1] Motor Car dealers are an exception here. They were included in the survey even if more than 25% of their trade was with other firms. Few garages deal exclusively with the public. This also applies to dealers in office furniture and equipment.

2] Examples of the covering letter, questionnaire and schedule are presented in Appendix C.

in the central area. In order to reduce costs associated with very lengthy interviews a dual approach to obtaining the research data was adopted for the main fieldwork. Initially each respondent was sent a questionnaire with a covering letter explaining the purpose of the study. In the questionnaire the more quantitative statistical information was asked for; information which in many cases required business records to be consulted. After approximately 14 days to one month an interviewer would call to check through the completed questionnaire with the respondent and conduct a structured interview on less quantitative aspects of retail trade and services. The interviewers used were generally more mature women who had been thoroughly briefed and trained.

Considerable resistance was encountered during the fieldwork despite the fact that the Durban Chamber of Commerce had given its support to the venture. Particularly the smaller White businessmen and hairdressers proved to be most unwilling to give information. (Generally speaking the Indian businessmen were very co-operative.) Initially the refusal rate was as high as 20% of the cases, and this figure could only be reduced by a supreme effort on the part of full-time members of the Institute staff. Items in the questionnaire relating to value of sales and services evoked most resistance, and quite a considerable proportion of respondents, while willing to grant an interview, refused information on turnover or sales figures.

(D) Processing and Analysis of Survey Results.

The processing of the data was performed on the University's I.B.M. 1620 Computer. Two types of establishments were excluded from the machine-tabulation. These were cinemas and Bantu trading establishments. The reason for their exclusion was the general lack of comparability between the results obtained from these establishments and the rest of the data, due in the Main to extreme reluctance on the part of the respondents to grant interviews.

In the analysis of the findings no attempt has been made to calculate tests of statistical significance. In a sample consisting of 34 substrata with variable sampling fractions any statistical calculations are very lengthy and time-consuming. For this reason such calculations were omitted. However, the data have been analysed with careful consideration given to the probable statistical properties of the results[1].

In the tabulated results, the data are weighted by the sampling fraction. Therefore the findings as presented represent estimates of the parameters in the universe from which the sample is drawn.

(E) General Assessment of the Survey Methodology and Results.

The study proved to be far more expensive than was originally anticipated. Due to the resistance encountered among many respondents numerous call-backs to sample addresses had to be made, often involving the time of senior members of staff. In this way however, results were obtained which can be regarded as generally valid and reliable.

The high costs of conducting such a survey prohibited the use of a large sample. The restricted sample size prevented making any highly detailed analyses involving more than two or three variables at a time. However, since the sample was very carefully stratified, the results which are presented can be assumed to have a high degree of precision.

1] The tabulated information on Market Stalls is not referred to in the body of the ensuring text. The major conclusion derived from the results for the firms are presented in Appendix E. It will be noticed that not all items in the questionnaire and schedule have been analysed. This is due either to the fact that the sponsors did not consider the particular analysis essential, or to the fact that the answers obtained were generally unsatisfactory. This was the case with the item on the proportionate value of sales of different types of goods, the non-response rate with this item was too high to make analysis feasible.

III. PRESENT PHYSICAL AND ADMINISTRATIVE CHARACTERISTICS OF RETAIL TRADE AND PERSONAL SERVICES IN DURBAN.

(1) The Geographical Distribution of Retail Outlets and Personal Services in Greater Durban.

The detailed tabulations of the results are presented in Appendix A at the back of the report.[1]

The geographic distribution of retail outlets and personal services is important from a planning point of view, since it gives an indication of the degree of centralisation or decentralisation of such facilities within the city. Unfortunately, in this report we are not able to present comparative figures over time which would show very clearly whether any significant movements away from the centre of the city are taking place.[2] Results discussed later in the report will provide some indication of whether this is happening or not.

Estimates of the current position show that the Grey Street Indian area has the largest number of establishments of all the natural areas delineated for this study. It has an estimated 1018 separate firms.

In the central business district the "Hard Core" area follows with an estimated 564 establishments. Other areas in descending order are: the Winder Street North area (or "motor town") (268): the Winder Street South and the Beach-front areas (110 and 106 respectively); and last of all the Albert Park area with an estimated 72 establishments.

Outside the central business district, the Southern Durban municipal suburbs have an estimated 661 firms; followed by the central or "Old Borough" area (569); the Western

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1] Results relevant to the geographic distribution of establishments are not presented in any particular table since reference to the column totals in tables where either the area of the firm's location or type of outlet and major geographic zones are variables will show this distribution.

2] The study was designed as a "static" investigation, concentrating intensively on one point in time. Consequently there is less information about changes over time.

municipal suburbs (346); the Warwick-Berea-Umbilo Road complex (193); Northern sea-facing suburbs (96);. and lastly the Northern inland-facing suburbs with an estimated 71 establishments.

The outlying municipal area with the largest number of establishments is Amanzimtoti; (including of course the Isipingo Indian areas), with an estimated 171 firms; followed by Pinetown (130); Umhlanga Rocks (48); Queensburgh (36); and Westville (31). New Germany and the rural areas of the Pinetown Magisterial district together have an estimated 42 establishments.

It should be remembered that cinemas and the few African-owned establishments are excluded from these numbers. Furthermore, a probable fairly high sampling error in the Queensburgh and rural Pinetown areas makes these estimates somewhat less trustworthy than estimates for other areas.

Turning now to the distribution of types of establishments in major zones we encounter the following patterns :

Area	Type of Establishment	No. of Firms	%
Hard Core of the Central Business District:	Personal Service	148 firms	26
	Convenience	76 firms	13
	Large Durables	93 firms	16
	Small Durables	233 firms	41
	Large Variety	14 firms	3
	Total	564 firms	99%
Grey Street Area of the Central Business District:	Personal Service	182 firms	21
	Convenience	228 firms	27
	Durables	438 firms	52
	Total [1]	848 firms	100%
Rest of Central Business District:	Personal Service	67 firms	12
	Convenience	224 firms	40
	Large Durables	85 firms	15
	Small Durables	176 firms	32
	Large Variety	3 firms	1
	Total	555 firms	100%

1] Excludes market stalls

Area	Type of Establishment	No. of Firms	%
Rest of the Durban Municipal Area:	Personal Service	188 firms	10
	Convenience	1240 firms	65
	Durables	478 firms	25
	Large Variety	9 firms	-
	Total	1915 firms	100%
Outside the Durban Municipal Area:	Personal Service	37 firms	8
	Convenience	269 firms	59
	Durables	143 firms	31
	Large Variety	8 firms	2
	Total	457 firms	100%

These figures suggest that as one moves away from the centre of town to more and more decentralised areas, so the proportion of personal services drops. With convenience outlets the proportion increases markedly with increasing decentralisation. (However, the proportion outside the Durban Municipal area is somewhat lower than in the Municipal suburbs, due to the fact that outlets for durable goods tend to form a greater proportion of the total in the outlying areas than in the Municipal suburbs.) The results suggest that personal services and durables tend to be centralised establishments (although outlets for durable goods become somewhat more numerous as one moves very far away from town). Convenience outlets are typically a more suburban than a centralised type of establishment.

(2) The Administrative Structure of Retail Outlets and Personal Services in Relation to Type of Firm and Area.

The broad term "administrative structure" in this context refers to the type of ownership of the firm, the number of branches of multiple businesses in the study area, and whether or not firms are major or minor branches of such multiple establishments. These characteristics are of interest to planners, inasmuch as they often relate to the financial strength and stability of businesses, and hence to the capacity for expansion and development of activities. When such characteristics are related to ecological zones they can provide some indication of the decentralisation of the normally centrally-based larger type of company.

Table I in Appendix A relates the ownership characteristics of firms to type of outlet, by major zones in the project area. Both in the Central Business District, and in the non-central areas, the outlets for durable goods and the large variety stores tend to be owned by either public or private companies. By contrast the personal services and convenience stores tend to be in the hands of individual owners or partnerships. Generally the greatest proportion of individually-owned establishments occurs among convenience outlets, followed by personal services and small durables. The biggest proportion of public ownership is encountered among large variety stores, followed by outlets for large durables. In the case of the latter however, the predominant type of ownership appears to be private company ownership.

There appear to be fairly significant variations in ownership according to the ecological zones in which the firms are located. The Hard Core area of the city seems to be characterised more by company ownership than the "Frame" of the business district, (where the incidence of private ownership is higher than in the Hard Core, except in the case of outlets for large durable goods, - here the high proportion of motor sales firms, garages, and large furniture stores explains the high incidence of company ownership). In the Warwick Avenue, Berea Road, Umbilo Road and Old Borough areas, only convenience outlets appear to have a significantly higher proportion of private ownership than in the central business district. In the rest of the Durban Municipal area, and in the areas outside the Municipal boundary, even the outlets for durables reveal a significantly lower incidence of company ownership. As is to be expected, large variety stores are all company owned.

One non-central area where a significant degree of company ownership exists is in the Old Borough area. Particularly on the lower slopes of the Berea and the Warwick Avenue, Berea Road, Umbilo Road complex roughly 60% of outlets for durables are company owned.

Finally, ownership in the Grey Street Indian area appears to be predominantly in the hands of private individuals or partnerships. (Even here outlets for durables show a relatively higher incidence of company ownership than other establishments.)

The incidence of branches of firms in various ecological zones gives some idea of the amount of expansion and decentralisation taking place by means of "multiple" outlets. Results bearing on this are presented in Table II in the Appendix. More than eight out of ten firms are single branch establishments in the project area. There appears to be a slightly higher incidence of multiple-branch establishments among outlets for durable goods, (particularly large durables), and a considerably higher incidence among large variety concerns.

When looked at in terms of ecological zones, the picture becomes clearest if the different types of outlets are combined. With large variety stores <u>excluded</u>, the following are the proportions of single branch concerns in each of the major zones:

Hard Core	70%
Grey Street Area	84%
Rest of the Central Business District	76%
Warwick Avenue, Berea Road, Umbilo Road, complex and Central Suburban areas	85%
Rest of Durban Municipal Area	90%
Outside the Durban Municipal Area	90%

Excluding the Grey Street area, (which is unique in its racial composition which has certain special implications as regards business structure), there appears to be a tendency for the proportion of single branch firms to increase with distance from the centre of town. This may mean that multiple-branch firms are more typical of the central business areas than other areas. On the other hand, it can also mean that most main branches of multiple firms are in the central business areas, with their minor branches thinly spread over the rest of the region.

The highest proportion of subsidiary branches occurs with outlets for durable goods in the Frame of the Central Business District. (See Table III, Appendix A) The next highest proportions of subsidiary branches in areas other than the Hard Core, are found among outlets for durable goods in the areas outside the more central suburban zones. One possible interpretation of these results is that the highest degree of administrative decentralisation is taking place among firms selling durable goods. This physical decentralisation is either to the areas immediately surrounding the Hard Core, or to a lesser extent to the more far-flung areas of the city. This conclusion is tentative however, since particularly in the "frame" area the main branches might often be situated in the same broad zone as their subsidiary branches.

The location of the main branches of outlets for large durable goods is known to be in the centre of town. It follows that the results show that there are more decentralised branches of department stores in the areas outside the Hard Core than there are main branches within the Hard Core itself. This process of decentralisation may also be affecting other types of outlets, but the results of our "static" study are not conclusive.

(3) Present Patterns of Total Floorspace and Sales and Service Areas, in relation to type of Establishment and area of Location.

Data on the physical size of firms is of obvious importance for town planning purposes. The patterns of floorspace, and the use of internal floorspace by commercial establishments, is likely to differ both between type of establishment, and between different ecological zones in the city. Knowledge of these patterns is essential where provision has to be made for commercial land-use in a planning area.

In conducting the present survey, full details were obtained from respondents about the total square footage of their firms within the outer walls of the buildings. This included all selling or service areas, lifts, landings, administrative areas, staff conveniences and storage space. In addition, separate information was obtained about the square footage of areas devoted to selling or service activity, and client or customer circulation-space. (The latter excluded storage, administrative areas, and staff facilities.) Results are presented in Tables IV to IX in Appendix A.

Tables IV and V show total and mean areas, both for total square footage/s, and also for sales/service area/s, for different types of establishments. In these two tables the data are tabulated separately for the hard core, the Indian business district, the "frame" of the Central Business District, and for the rest of the project region as a whole.

In Tables VI and VII similar data are provided in this case; the percentage distribution of firms in different size categories is shown, and the area outside the Central Business District is broken down into more refined ecological zones. In Tables VIII and IX similar data are presented within very refined ecological zones. However, here it was not possible to distinguish between types of establishments since statistical reliability would suffer too greatly had this been attempted.

The figures for mean floorspace presented in the different tables in some instances differ slightly. This is because in Tables IV and V the means are calculated on the basis of raw data, while in the other tables means were calculated on the basis of grouped data. The differences are unimportant.

Generally these results show the pattern of floorspace which was expected. The figures are virtually self-explanatory and need little comment. Some comment on the probable statistical significance of differences is necessary. In Table IV, one can assume that the establishments in the Hard Core are larger, on average, than the establishments in Grey Street and in the areas outside the Central Business District. The estimates of average total floorspace for the Hard Core and the rest of the Central Business District differ only to the extent of some 500 square feet. This is not likely to be significant, and we must assume that there is no difference between the two areas. The average for the Grey Street area suggests that establishments there are significantly smaller than these in any other major zone. The differences in the average total floorspace for different types of establishments appear to be significant, with the exception of differences between personal service establishments and convenience outlets in the Hard Core area; and also differences between convenience firms and firms selling small durable goods, in the rest of the

Central Business District. The pattern of differences supports the expectation that the type of outlet, and the area in which it is located, both relate very significantly to the total size of the establishment.

When we compare the results for total floorspace in Table IV with those for sales or service areas in Table V, a very similar pattern of differences emerges. The one important exception is that while firms in the Hard Core and the rest of the Central Business District appear to be similar in total size, the Hard Core establishments show a significantly higher average for sales and service area. The reason for this difference lies with the large establishments selling durable goods, (which include many garages where sales area tends to constitute a small proportion of the total floorspace). Again, in the case of average sales and service areas, all the differences appear to be significant except those between personal service and convenience establishments in the hard core, and between convenience and outlets for small durable goods, in the "frame" area. While the Hard Core has only 12.5 percent of the total number of firms in the metropolitan area, it contains over 28 percent of the total retail and service floorspace in the metropolitan area.

When we relate the sales and service area to total floorspace in the different categories, the proportions which emerge are as follows:-[1]

Sales/Service area as a proportion of total area for:

A.)	"Hard Core" :	1.	Personal Service	66.1%
		2.	Convenience	62.0%
	All Outlets = 67.7%	3.	Small Durables	57.8%
		4.	Large Durables	69.6%
		5.	(All Durables)	(63.0%)
		6.	Large Variety	72.3%
B.)	"Grey Street" :	1.	Personal Service	73.3%
		2.	Convenience	68.4%
	All Outlets = 67.4%	3.	Durables	65.2%

1] Proportions obtained by taking the average sales/service area as a proportion of the average total square footage for each category.

C.)	"Rest of C.B.D."	1.	Personal Service	74.7%
		2.	Convenience	65.7%
	All Outlets = 37.4%	3.	Small Durables	59.4%
		4.	Large Durables	31.9%
		5.	(Durables)	(33.9%)
		6.	Large Variety	60.0%
D.)	"Outside C.B.D."	1.	Personal Service	52.1%
		2.	Convenience	63.9%
	All Outlets = 52.4%	3.	Durables	40.5%
		4.	Large Variety	53.6%

These results suggest that the Hard Core, Grey Street and Frame establishments (with the exception of large durables outlets), make much more intensive use of their total floorspace for sales than do the establishments in the areas outside the Central Business District.

The proportions for different types of establishments show that most establishments utilize between 60% and 70% of their total area for selling or service activity. Few of the small differences between these percentages are significant. Exceptions are that large variety stores in the Hard Core appear to make relatively more intensive use of the total area; and durable goods outlets in the Frame area and outside the Central Business District make relatively less intensive use of the floorspace for sales purposes.

In the analysis so far, the Mean (average) has been used as a measure of central tendency. Means however, are radically affected (positively) by small members of very large establishments in each category. For descriptive purposes, and to obtain an idea of the "typical" size of establishments in each category and area, the "median" is a more effective measure. On the other hand, where quantification is necessary for forecasting floorspace requirements, the mean is the appropriate statistic to use, as here the "median" could be misleading. Comparing mean and median measures of central tendency shows how distributions of establishments of different sizes are "skewed". A large mean and a small median in a category, for example, indicates that there are fewer very small firms than there are very large firms. In Tables VI and VII in the Appendix, medians have been calculated for purposes of comparison. These tables show the distribution of firms in size groupings. The results give an indication of the variations in size of firm within categories. The medians are generally far lower than the equivalent means. This shows that small numbers of very large firms exist in most categories.

In Tables VI and VII the variations between medians for different types of establishment within major zones appears to be fairly significant. Exceptions are the small difference in median total floorspace between convenience outlets and establishments selling small durables, in the Hard Core; and secondly the small difference between median sales/service areas for personal service and convenience establishments, also in the Hard Core. In general, the medians presented reveal the same pattern of differences between areas as did the means.

In Tables VIII and IX in the Appendix the percentage distribution of firms of all types, according to size groupings of total floorspace and sales area, is presented in more refined ecological zones. Means and medians are also presented. We need comment only on the differences in results between important central areas not already discussed above. The Beachfront, Albert Park, Winder Street South and Winder Street North areas differ to a considerable extent in terms of median total floorspace. The firms in the Winder Street North (or "motor town") area have the highest median total floorspace. The firms in the Winder Street South and dockland areas are the smallest in terms of median floorspace. The firms in the Beachfront and in the Albert Park areas are roughly mid-way in terms of median size between the first two areas. The equivalent mean figures bear little relation to the medians because of the presence of a few very large firms, particularly in the Winder Street South area. On the whole there is a much greater degree of variation in size of firms in the Winder Street North and Beachfront areas than in the other two areas mentioned.

As regards the figures for sales and service areas, the medians between the four areas do not differ to any marked degree. Once again however, the presence of a few very large firms, (this time in the Winder Street North and Albert Park areas) does contribute to significant differences in the measures of mean sales/service areas for the four localities.

The preceding comments do not draw attention to all the significant features in the pattern of total floorspace and sales areas in the project region. In view of the many comparisons which could be made, a discussion of all significant features would be a very lengthy exercise. The reader is referred to the relevant Tables in the Appendix, if further information on other specific aspects of interest is required.

(4) Employment in Retail Outlets and Personal Services.

Different types of establishments in different areas are likely to differ widely in regard to the numbers of persons employed. For this reason it was considered important to relate employment characteristics to types of establishments within major ecological zones. In Table X in the Appendix these results on employment are presented, by race and sex, including results on the average number of employees per establishment. Since all the data are weighted to provide estimates of the universe, the total number of employees in each category is an approximation of the actual current employment.

The results in Table X suggest a great variety of different conclusions, not all of which are pertinent here. As regards estimated total numbers of employees the results are self-evident and need not be discussed at any length. However, attention can be drawn to certain major features. In both retail trade and personal services, more persons are employed in the C.B.D. than are employed in the suburban areas. Bantu males are an important exception here since slightly fewer are employed in the C.B.D.

In the C.B.D. Hard Core area, roughly one half of the employees work in large variety stores. Second largest employers are small durables stores, followed by personal services, large durables outlets and convenience stores, the latter outlets having quite considerably fewer employees than other establishments.

In the Grey Street Area the order of employment size differs; highest of all being the durables outlets, followed by convenience, and lowest of all, personal services. The Frame area of the C.B.D. has employment characteristics which emphasise the relatively greater importance of large durables and convenience outlets in this type of area.

As one moves into the suburban areas, the relative size of employment in convenience outlets becomes greater with increasing distance from the city centre. Correspondingly relative employment in personal services and durables outlets decreases with distance from the centre of town. It is quite obvious that employment is a fairly faithful indication of the type of specialisation in retail trade and services encountered within different ecological zones.

It is interesting to note that employment in retail outlets in the Hard Core area does not completely outweigh the employment in the Frame area. Even leaving aside the Indian Business District, it would appear that employment in the Hard Core area is only roughly 55 - 60 percent of the total employment in the (White) C.B.D. While the Hard Core might be a highly concentrated area, it certainly does not appear to eclipse all other zones in terms of trade activity.

The racial composition of the labour force tends to differ considerably between major ecological zones. For example, it would seem that White employees predominate in the Hard Core area, accounting for some two-thirds of the total employment. On the other hand, in the Frame area, (excluding the Indian Business District,) the proportion of Whites drops to below one-half, and to roughly one-third in the suburban areas. This tendency is undoubtedly partly due to the fact that the outlying areas include a greater proportion of Non-White owned businesses. However, it would also appear to be the case that predominantly White employment (particularly female,) is more characteristic of the higher quality, more specialised trade in the Hard Core than it is characteristic of trade in other areas.

The average number of employees per firm, like total employment, tends to show marked differences according to type of establishment and ecological zone. In the Hard Core, the large variety stores have over 300 employees per firm on average while the average for other types of firms varies between roughly 17 per firm in large durables outlets, to roughly 8 employees per convenience store.

In the Indian Business District convenience stores might have slightly more employees than other firms. In the White Frame area, the large durables outlets (furniture stores and motor-traders) have even more employees per firm than non-central variety stores, while the other types of establishments have generally fewer employees than their counterparts in the Hard Core. In the suburban areas, the large variety stores are generally far larger in terms of employment than all the other establishments. Durables outlets also appear to be somewhat larger than convenience stores and personal services.

More generally, it seems that, on average, firms in the C.B.D. have a rouhgly 70% larger employment strength than firms in the suburban areas. This is only to be expected since firms in the C.B.D. do tend to be larger than those in the suburbs. The relationship between employees and floorspace will be discussed later in the report in some detail.

(5) Age of Firms.

Some indication of the relative amounts of change which have occurred in the various areas of the city is provided by data on the age of presently existing firms. These results are given in Table XI in the Appendix, which shows the percentages of firms of particular types in various areas which had already been established at a particular financial year.

The percentages for all firms together show an interesting trend. These results suggest that the tempo in the establishment of new firms between 1951/52 and 1958/59 was slow. The tempo would appear to have increased progressively in the years between 1958/59 and 1960/61, 1960/61 and 1962/63, and between 1962/63 and 1964/65. The results also suggest that this tempo might have even increased a little more between 1964/65 and 1965/66.

These results should be interpreted with caution, however, since they undoubtedly reflect two phenomena. One is the rate of expansion in the number of business establishments over the years, but the other is the stability of existing establishments. If firms are financially weak and unstable and are replaced by others, the effect on the results would be the same as would a marked expansion in the number of firms. The results should therefore be seen as a combined index of "change".

The class of firm which has shown most change is Hard Core - convenience, followed by convenience outlets in Grey Street and in the rest of the Central Business District. Since it seems unlikely that there has been any marked expansion in convenience outlets in these areas, the results would suggest a considerable instability in this class of firm.

The most "unchanged" class of firm is undoubtedly the Hard Core large variety store. Other classes which show less than average degrees of change are large durables outlets in the Central Business District, and personal services in the Hard Core and in the suburban areas. These classes of firms are probably not likely to be any less prone to expansion than others, and one might tentatively conclude that they are more stable than others.

It is unfortunate that the results of this study cannot allow a distinction to be made between instability and expansion in business undertakings. A study over time would be required for this type of analysis. However, the results presented do allow for some cautious interpretation and were therefore considered worthy of inclusion.

(6) Financial Turnover.

This rather important aspect of business activity caused many problems at the data-gathering stage of the study. Respondents were generally very reticent about providing information on turnover. Initially, more than 50% of firms refused to give any details whatsoever, despite the fact that the information was asked for in the form of grouped intervals rather than in the form of raw or exact amounts. After many follow-up visits to respondents who had initially resisted giving the information, the refusal rate on the turnover question was reduced to roughly 20 percent. In some categories of firms the percentage of non-response is higher, and therefore the results have to be interpreted with some caution in certain areas.

The results in Table XII show that tremendous variations in financial turnover exist between various types of firms in the different ecological zones. Personal Service establishments in the Hard Core and in the Old Borough suburban area appear to have a roughly similar average turnover, but similar establishments in other areas appear to do considerably less business. Average turnover in the areas outside the Municipal area appears to be significantly higher than the turnover in the Municipal area outside of the Central and "Old Borough" suburbs.

As regards convenience outlets, the average turnover in the Hard Core and Grey Street areas, and in the outlying municipal suburbs appears to be largely similar. The average turnover in convenience outlets in the Old Borough area seems significantly higher, and the averages in the White Frame and the average turnover in the areas outside the Municipal area is higher still.

When comparing durables outlets, we find that the averages for the Hard Core area are considerably lower than the averages in the "Frame" area. The average turnover among large durables outlets in the Hard Core is significantly lower than that for similar establishments in the "White frame", due, no doubt to the large motor dealers and furniture stores in the frame area. On the other hand, the small durables outlets in the Hard Core area have a much higher average turnover than similar establishments in the frame area. Following the Frame and Hard Core areas in order of the size of average turnover are the durables outlets in the Old Borough area, and the areas outside the Municipal boundary, and lowest of all the Grey Street area and the outlying Municipal suburbs.

Among large variety stores, the average turnover is highest in the C.B.D. - Hard Core area, followed by the area outside the Municipal boundary, and lowest of all the large variety establishments in the rest of the Municipal area.

One significant trend has been clearly evident in these results. That is the tendency for firms outside the Municipal area to have higher average turnover's than the firms in the less-centrally situated Municipal suburbs. There would appear to be a positive relationship in suburban shopping between size of turnover and distance from town. This is possibly due to the fact that customers living appreciable distances from the central area patronise their local firms relatively more than customers who live in suburbs a little nearer the centre of town.

(7) Ethnic Distribution of Customers in Different Areas.

In an ethnically mixed city like Durban, any analysis of retail trade and personal services should take account of the ethnic composition of customers in various ecological areas. The ethnic composition of customers can often be an important factor in determining the character of retail trade in any area.

In Table XIII results are presented which show the ethnic composition of customers in relation to a fairly detailed geographical subdivision of the project area.

In the Hard Core slightly over one-third of firms have an exclusively or near exclusively White clientele. (These firms include almost all the personal service establishments.) Furthermore, over nine out of ten firms in the Hard Core have a majority of White customers. On the other hand, roughly 60 percent of the firms in the Hard Core have substantial proportions (over 15 percent) of Non-White customers. Roughly one-half of the firms have substantial numbers of Bantu customers.

In the Grey Street area, only roughly 7 percent of firms have a majority of White customers, while roughly 40 percent of firms have a majority of Indian and Coloured customers. Slightly more than 40 percent of firms have a majority of Bantu customers. Roughly 12 percent of firms have substantial proportions of White customers. These results do tend to reveal the considerable extent to which the Indian Business District is dependent on Bantu custom.

In the Beachfront Zone all firms have a majority of White customers, while roughly 30 percent of firms have substantial proportions of Indian and Coloured customers. Surprisingly enough, over 50 percent of firms appear to have substantial numbers of Bantu customers. This appreciable number of Bantu customers is probably drawn from the flat and hotel service workers in the area.

In the areas surrounding Albert Park we also find that all the firms have a majority of White customers. Slightly over one-third of the firms have substantial proportions of Indian and Coloured customers, while roughly the same proportion of firms have substantial proportions of Bantu customers.

In the Point and docks area of the C.B.D. slightly less than half of the firms have a majority of White customers.

A roughly equal proportion of firms have a majority of Bantu customers, and only roughly ten percent of the firms have a majority of Indian or Coloured customers. In addition to these firms which have a majority of Bantu customers, roughly 40 percent of the firms have substantial proportions of Bantu customers. It would seem that Bantu customers outnumber all other individual ethnic groups in this area. This is probably largely due to the presence of large numbers of Bantu stevedores working in the area.

In the area to the North of Winder Street, the "Motor Town" Zone, some three-quarters of the firms have a majority of White customers. Roughly 20 percent of the firms have a majority of Bantu customers, these probably being the firms located on the transportation routes of Bantu workers at the docks. Roughly one half of the firms in this area have substantial proportions of Indian and Coloured customers.

In the Warwick, Berea, Umbilo Road complex slightly over one half of the firms have a majority of White customers. Somewhat more than one-quarter of the firms have a majority of Bantu customers. Only roughly 5 percent of these firms have a majority of Indian and Coloured customers. However, fully three-quarters of the firms have substantial proportions of Indian customers, compared with some 70 percent of firms where more than 15 percent of the customers are Bantu.

The other areas shown in Table XIII will not be discussed in much detail. Suffice to say that even in areas where the shopping is customarily regarded as being "White" in character, there are surprisingly high percentages of firms which have substantial proportions of Non-White customers. Percentages of firms having substantial proportions (15 percent or more) of Non-White customers are given below for selected areas customarily regarded as being "White" shopping areas.

Old Borough - Upper Socio Economic area	63%
Durban North - Upper Socio Economic area	53%
Westville	33%
Umhlanga Rocks	51%
Pinetown	95%
Queensburgh	87%

In the project area as a whole (excluding Bantu group areas) between roughly 16 and 20 percent of firms have an exclusively White or near White clientele. Roughly 50 percent of firms have a majority of White customers, 28 percent a majority of Indian and Coloured customers, and roughly 20 percent have a majority of Bantu customers.

Roughly two-thirds of all firms have Indians and Coloureds comprising more than 15 percent of their clientele, and only a slightly lower proportion of the firms have Bantu customers comprising more than 15 percent of their clientele.

This brief discussion concludes the treatment of the more purely descriptive aspects of the research findings. In the ensuing sections of the report we will turn to an analysis of trends in retail trade and personal services in the Durban Metropolitan area.

IV. SOME ASPECTS OF EXPANSION AND SPATIAL MOVEMENT AMONG RETAIL OUTLETS AND PERSONAL SERVICES.

It is a common claim that as the so-called "urban residential sprawl" develops in modern cities, there is a concomitant movement of retail outlets and services away from the city centre. This movement is usually assisted by a host of problems associated with congestion and high land values and rentals in the central area.

In a study such as the present one, it is important to try and assess the extent to which such decentralisation is taking place. More specifically, our attention has been directed to patterns of spatial movement in relation to area and type of establishment.

Firstly, let us consider how long firms have been established at their present sites. This set of data is rather limited in the conclusions it allows, due to the inherent disadvantages of a sample at one point in time. This information can indicate whether shopping and services in an area are relatively "new" or "old"; but it can also serve as an index of the relative stability of firms in the area. If there is a tendency in the area for firms to close down and to be replaced by others, the results in that area will not differ from those in an area of new business development. At best these results can be taken as a rough indication of "change" in a general sense. Where proportions of firms recently established are low, one may conclude that very little has happened in the particular area; certainly one may conclude that no significant influx of new firms has taken place. Results pertinent to this aspect of the enquiry appear in Table XIV in the Appendix.

It would appear that slightly over 50 percent of all firms in the project area have been established at their present sites between 1960 and 1966. Without comparative figures from other cities not much can be said about this, except to state that the proportion appears to be high. Some 30 percent of firms have located themselves where they are over the last two years since 1964. These proportions do suggest a high rate of "change" in the area as a whole.

Among categories of firms, it would appear that only the Hard Core departmental stores are completely long-established types of firms. In the Central Business District and Old Borough areas the small durable outlets would appear to have been less recently established at their present sites than other types of firms (excluding large variety stores). The implications of this are not clear, but tentative observations would suggest greater financial stability as the predominant reason rather than an absence of expansion among these firms.

In the Hard Core area almost nine out of ten convenience stores have established themselves since 1960. Once again, very tentative observation would suggest that in the case of this type of firm it is financial instability rather than a rapid expansion which accounts for the results. Among personal services in the Hard Core, where almost eight out of ten are newer firms, our feeling is that an expansion in facilities weighs rather more heavily than financial instability in determining the results.

The results do quite clearly show that certain categories of firms are new developments and represent a particular type of expansion in particular areas. The planned centre establishments and large variety stores in the peri-urban areas obviously represent recent expansion. To a lesser extent the same can be said of large variety stores in the outlying municipal suburbs.

In the present project we also set out to examine the "locational" history of firms by obtaining details on previous addresses. In total the results show that more than eight out of ten firms have no previous addresses. For this reason it seemed advisable to analyse the movement of firms rather differently to the other analyses contained in this report. Due to the small numbers of sample cases with previous addresses, normal cross-tabulations of the results do not provide the necessary insights. Furthermore, the area boundaries used in the other analyses did not appear to be suited to the analysis of mobility among the firms studied.

Accordingly, we present below a complete description of all moves which have taken place among sampled cases, including the date of the move and the raising factor applicable to each move. The data is presented in categories according to the geographic character of the move. The areas distinguished differ somewhat from the area boundaries used hitherto. A rather more restricted Hard Core area is isolated ("Inner Core") covering only the firms situated between Pine, Smith, Gardiner, and Broad Streets. It seemed necessary to restrict the area in this way in order to discern any slight patterns of decentralisation which might be taking place. Other areas within the Central Business District are combined in order to maximise sample numbers.

All moves made by firms have been included, and therefore first, second and third moves made by any particular firm appear as separate items of information. Moves which have no geographic significance, such as a move from one site to the one next door have been omitted.

The following are the moves made by firms included in the sample :

DESCRIPTION OF MOVES AMONG SAMPLED FIRMS.

Note: Descriptions are duplicated where necessary. Moves to premises in very close proximity to the old site have been omitted. Raising factors are given in brackets to allow estimates to be made of the number of moves undertaken in the universe.

1.) Moves away from "Inner Core" of the Central Business District.

Durables

Office Machinery : Mark Lane to 33 Parry Road. 1964. (RF 5.5)
Office and Home Furniture : Cor. West and Field Streets to Russell and Smith Streets. 1965. (RF 5.5)
Motor Cycles : 436 West Street to 508 West Street. 1931. (RF 5.5)

Personal Service

Womens Hairdresser : 440 West Street to 105 Berea Road. 1960. (RF 4.7)
Womens Hairdresser : Cor. West and Broad Streets to 197 Smith Street. 1945. (RF 5.0)

2.) <u>Moves into the "Inner Core" from less Central Areas.</u>

<u>Durables</u>

Jeweller : 33 Fenton Road to 28 Plowright Lane. 1960. (RF 10.6)
Musical Instruments : Berea Road to 408 West Street. 1956. (RF 5.5)
Sewing Machines : Umbilo Road to West Walk. 1961. (RF 5.5)

<u>Personal Service</u>

Womens Hairdresser : 48 Aliwal Street to 441 West Street. 1962. (RF 8.7)

3.) <u>Moves within the "Inner Core".</u>

<u>Durables</u>

Clothing : Cor. Field and West Streets to 322 West Street. No date. (RF 10.6)
Clothing : 420 West Street to 79 Gardiner Street. 1953. (RF 10.6)
Clothing : 79 Gardiner Street to 304 West Street. 1963. (RF 10.6)
Clothing : 45/9 Gardiner Street to Plowright Lane. 1954. (RF 10.6)
Shoe Store : 411 West Street to 452 West Street. 1956. (RF 10.6)
Radio Dealer : 376 West Street to London Arcade. 1962. (RF 5.5)

<u>Large Variety</u>

444 West Street to 416 West Street. 1932. (RF 2.0)

<u>Personal Services</u>

Photographers : 401 West Street to 438 West Street. 1951. (RF 8.7)
Photographers : 438 West Street to 347 West Street. 1956. (RF 8.7)
Photographers : 347 West Street to 81/5 Field Street. 1961. (RF 8.7)
Photographers : 326 West Street to 339 West Street. 1958. (RF 8.7)
Womens Hairdresser : 320 West Street to 349 West Street. 1950. (RF 8.7)
Dressmaker : Cor. West and Field Streets to Old Well Court. 1964. (RF 8.7)

4.) <u>Moves into Zones within the Larger Central Business District.</u>

(a) <u>Moves into the zone East of the "Inner Core" to the Beach.</u>

<u>Durables</u>

General Dealer : North Coast Road to 13 Soldiers Way. 1955. (RF 10.6)
Car Sales : Pietermaritzburg to 179 West Street. 1935. (RF 5.5)

Durables

Carpet Sales : 493 West Street to 195 West Street. 1956. (RF 5.5)
Curio's : Commercial Road to 121 Gillespie Street. 1964. (RF 10.6)

Convenience Outlets

Fruiterers : Johannesburg to 450 Point Road. 1965. (RF 10.8)
Pharmacy : 70 Victoria Street to 269 Smith Street. 1963. (RF 10.8)

Personal Services

Womens Hairdresser : Cor. West and Broad Streets to 197 Smith Street. 1945. (RF 5.0)

(b) Moves into the zone South of the "Inner Core".

Durables Outlet

Office Machinery : Mark Lane to 33 Parry Road. 1964. (RF 5.5)

(c) Moves into Areas West of the "Inner Core"

Durables

Office and Home Furniture : Cor. West and Field Streets to Cor. Russell and Smith Streets. 1965. (RF 5.5)
Motor Cycles : 436 West Street to 508 West Street. 1931. (RF 5.5)
Office Equipment : Commercial Road to 473 Smith Street. 1955. (RF 5.5)
Furniture : 19 Umbilo Road to 481 West Street. 1938. (RF 5.5)
Furniture : 21 Melbourne Road to 42 St. George's Street. 1961. (RF 5.5)
Carpet Sales : Hermitage Street to 493 West Street. 1953. (RF 5.5)
Radio Sales : Beach Grove to 91 Russell Street. 1957. (RF 5.5)

Personal Service

Funeral Parlour : Point and West Streets to 523 West Street. 1930. (RF 4.7)

(d) Moves into the Grey Street Area.

Durables

Haberdashery : 208 Umgeni Road to 201 Grey Street. 1963. (RF 19.7)

5.) Restricted moves within Zones in the Central Business District (excluding the "Inner Core").

Durables

Furniture : 42 St. George's Street to 465 Smith Street. 1963. (RF 5.5)

Durables

Furniture : 110 Russell Street to 519 West Street. 1964. (RF 10.6)
Carpet Sales : 195 West Street to Aliwal Street. 1960. (RF 5.5)
Carpet Sales and Household Goods : 519 West Street to 83 Russell Street. 1960. (RF 5.5)
Curio's : 84 West Street to 76 West Street. 1960. (RF 10.6)
Curio's : 175 West Street to 84 West Street. 1957. (RF 10.6)
Office Equipment and Furniture : 20 Field Street to 103 Victoria Embankment. 1965. (RF 5.5)
Office Equipment : 473 to 494 Smith Street. 1962. (RF 10.6)
Clothing : 150 Victoria Street to 117a Victoria Street. 1958. (RF 29.4)
Car Sales : Stanger Street to 181 Smith Street. 1919. (RF 5.5)
Car Sales : 181 Smith Street to 93 West Street. 1952. (RF 5.5)
Car Sales : 174 West Street to 150 Smith Street. 1956. (RF 5.5)
Motor Cycles : 170 West Street to 103 Smith Street. 1966. (RF 5.5)

Convenience

Chicken Sales : 112 Russell Street to 65 Broad Street. 1965. (RF 10.8)
Restaurant and Cafe : 51 Aliwal Street to 1/5 Aliwal Street. 1965. (RF 10.8)
Pharmacy : 116 Victoria Embankment to 122 Victoria Embankment. 1963. (RF 10.8)

Personal Services

Tailor : 52 Cathedral Road to 33 Madressa Arcade. 1957. (RF 15.2)
Womens Hairdresser : 458 Point Road to 108 West Street. 1965. (RF 8.7)
Hairdresser and Beauty Parlour : 77 Gillespie Street to 150 Gillespie Street. 1956. (RF 8.7)
Womens Hairdresser : 197 Smith Street to 444 Point Road. 1946. (RF 5.0)
Beauty and Slimming Salon : Edenroc to Claridges Hotels. 1960. (RF 2.8)
Beauty and Slimming Salon : Claridges to Mutual Beach Centre. 1966. (RF 2.8)

6.) Total Movement away from the Whole Central Business District to Outer Areas.

Convenience

Restaurant/Cafe : 132 Point Road to 216 South Coast Road. 1957. (RF 10.3)

Personal Services

Barber : 128 Point Road to 126 Sarnia Road. 1953. (RF 5.2)
Womens Hairdresser : 440 West Street to 105 Berea Road. 1960. (RF 4.7)
Womens Hairdresser : 444 Point Road to 288 Berea Road. 1954 (RF 5.0)

Personal Services

Indian Hairdresser : 115 Victoria Street to 159 Warwick Avenue. 1959. (RF 5.0)
Funeral Parlour : 552 West Street to 26 Berea Road. 1933. (RF 4.7)

7.) Moves away from the Warwick Avenue, Berea and Umbilo Road Complex.

Convenience

Butcher : 99 Warwick Avenue to 60 Cromwell Road. 1932. (RF 10.3)

Durables

Musical Instruments : Berea Road to 408 West Street. 1956. (RF 5.5)
Sewing Machines : Umbilo Road to West Walk. 1961. (RF 5.5)
Furniture : 19 Umbilo Road to 481 West Street. 1938. (RF 5.5)
Furniture : 21 Melbourne Road to 42 St. George's Street. 1961. (RF 5.5)
Builders Supplies : 263 Umbilo Road to 448 Umbilo Road. No date. (RF 7.0)
Domestic Appliances : 108 Umbilo Road to Glenwood Centre. 1965. (RF 2.8)
Clothing : 342 Himalaya Arcade to Merebank. 1964. (RF 48.1)

8.) Moves within the Warwick/Berea/Umbilo Complex.

Convenience

General Dealer : Cor. Canada and Umbilo Roads to 118 Umbilo Road. 1927. (RF 14.0)
Cake Shop : 239 Berea Road to 189 Berea Road. 1966. (RF 10.3)

Durables

Electrical Appliances : Bay Passage to Cuckoo Lane. 1949. (RF 9.9)
Electrical Appliances : Cuckoo Lane to 227 Gale Street. 1952. (RF 9.9)
Furniture : 621 Smith Street to 21 Melbourne Road. 1958. (RF 5.5)
Womens Outfitters : 74 to 94 Berea Road. 1961. (RF 9.9)

Personal Services

Dressmaker : 207 Moore Road to 102 Gale Street. 1966. (RF 5.0)

9.) Movement in Sururban Areas.

Convenience

General Dealer : 79 Davenport Road to 33 Dirk Uys Street. 1964 (RF 10.3)
Cafe : 566 Umbilo Road to 608 Umbilo Road. 1958. (RF 10.3)
Supermarket : Montclair to Kloof. 1961 (RF 10.3)
Fishery : Musgrave Centre to 8 Broadway, Durban North. 1967. (RF 10.3)

Durables

Electrical Goods : Norwich Crescent, Woodlands to 396 South Coast Road. 1962. (RF 7.3)
Boutique : 94 Overport Drive to Musgrave Centre. 1963. (RF 2.8)
Sports Goods : 62a Kensington Drive to Woolworths Centre, 53 Kensington Drive, Durban North. 1965. (RF 2.8)
Household Goods : 35 Clayton Road, Overport to 384 Randles Road, Sydenham. 1964. (RF 15.7)

Personal Services

Beauty Parlour : 110 North Coast Road to 885 North Coast Road. 1957. (RF 5.2)

From these results it appears quite evident that more movement takes place within restricted zones than between geographic areas. Firms do seem to be bound to particular localities.

Quantitative estimates of movement between zones are difficult because of the low sample numbers involved. Any such estimates are bound to be subject to considerable error. Certain tentative conclusions do suggest themselves, however.

Firstly, it would seem that movement both in and out of the so-called "Inner Core" is relatively slight. Broadly speaking approximately 26 firms have moved out of this area, and approximately 30 have moved into the area from less central zones. The difference of 4 firms is certainly not significant and we have to assume that outward and inward movement has been self-compensating.

However, if the comparison is limited to more recent movements during the 1950's and 1960's, it would seem that the "Inner Core" has experienced a nett gain from geographic movement. Taking the Central Business District as a whole, the figures give broad estimates of 35 firms having moved out and 70 having moved into the Central Business District from elsewhere, including other cities. The difference here can be taken to be significant, and we may assume that the Central Business District has gained rather than lost from the geographic movement of business. If we group the Central Business District and the Warwick/Berea/Umbilo complex together we find that some 30 firms appear to have moved out of the suburban areas into the Central Business District or the Berea, Umbilo, Warwick Avenue complex, while our data suggests a figure of 84 firms having moved into the suburban areas from the centrally situated complexes. This estimate of 84 firms is however subject to a very wide range of error since it is partly based on one sample firm with a raising factor of 48. The conclusion that the suburbs have gained rather than lost from the movement of firms is therefore very tentative.

Looking at more specific zones within the central areas is also bound to provide only very tentative insights. The results suggest that somewhat more firms have moved into the frame area East of the "Inner Core" than have moved out. (± 59 moving in as opposed to ± 34 having moved out.) More firms appear to have left the area between the "Inner Core" and the bay than have moved in. (± 22 moving out as opposed to ± 6 moving in.) On the other hand it does seem as if more firms have moved into the frame area West of the core than have moved out. (± 43 as against ± 15.) More firms seem to have left the Warwick, Berea, Umbilo Area than have moved in, although here the estimate of 90 firms having departed is once again subject to wide error.

Other than these conclusions few other distinct trends appear with any great reliability or clarity, apart from the fact that durables outlets and personal services seem more prone to geographic mobility than convenience stores or large variety establishments. West Street, the main shopping street in Durban would at first glance appear to have lost more than it has gained through movement of firms. This impression is due to the movement of motor firms from West Street to Smith Street however. In all other uses West Street would appear to attract as much as it loses.

As regards the time of moves, there appears to be a fairly even spread of dates over the period between the middle fifties and the present. A careful analysis guided by specific planning objectives might reveal certain trends, but it should be remembered that an inherent source of bias would exist in any such exercise. Due to many firms having ceased to exist for various reasons, an under-representation of early mobility is inevitable. Attention has already been drawn to the fact that a very large proportion of firms are relatively new.

If we confine the analysis of moves to those which have taken place very recently, say since the beginning of

1963, we find that there is scarcely enough material on which to base generalisations. However, it does seem that there has been no (or at best very little) movement into the "Inner Core" area, but that some movement of large durables out of the area has taken place in recent years. Some movement of convenience outlets into the frame area East of the "Inner Core" seems to have occurred. It also seems probable that large furniture stores have been seeking better premises nearer to the passing furniture trade in recent times.

No significant movement away from the Central Business District to outlying areas has occurred recently, despite all expectations that this would be the case. One can however discern a distinct pattern of moves of smaller concerns into planned centres.

These conclusions are unfortunately all that the rather limited material does allow. However, one very definite global picture emerging is that no significant decentralisation of retail outlets and services through the movement of existing firms appears to be taking place at present.

It therefore becomes clearly apparent that whatever development and expansion is taking place in Durban is occurring as a result of new firms being established.

We have already looked at results bearing on the date of establishment of firms at their present site. Following our interest in patterns of growth in trade and services in various parts of the city, we can refine these results somewhat by isolating areas where larger firms have been recently established. The assumption here is that larger firms will provide an indication of where substantial suburban shopping growth is taking place, as opposed to merely the growth of small "street corner shops". Smaller "corner shops" have always followed residential development, and as such an expansion in this type of firm does not constitute any major change or necessarily represent the development of substantial decentralised shopping.

The following are details of newly established or newly relocated larger firms in the various major ecological zones.

LARGER FIRMS ESTABLISHED OR RELOCATED SINCE 1962 ACCORDING TO AREA AND TYPE OF FIRM.

NOTE: "Large" Firms defined as having either a total square footage of more than 3000 square foot, or more than 4 employees, or a turnover of more than R40,000 per annum. Only firms which have moved from different areas are included.

Area	Type of Firm	Subsid. or Main/ Only Branch	New Firm or Moved	Date of Location	Raising Factor	
C.B.D. - Inner Core	Sports Goods	M	New	1964	10.6	Total 21.2
	Shoe Store	M	New	1962	10.6	
C.B.D. - West of Inner Core	Car Sales	S	New	1964	5.5	Total 16.5
	Furniture	S	New	1965	5.5	
	Furniture	M	New	1963	5.5	
C.B.D. - East of Inner Core	L/Var.	S	New	1966	2.8	Planned Centre
	Car Sales	M	New	1965	5.5	Total 24.4
	Durables	M	New	1964	10.6	
	Car Sales	S	New	1966	5.5	
C.B.D. - South of Inner Core	Furniture	M	New	1965	5.5	Total 14.2
	Womens Hairdresser	M	New	1964	8.7	
C.B.D. - Grey St.	Car Sales	M	New	1963	29.4	Total 49.1
	Restaurant	M	New	1964	19.7	
Suburbs - Durban North	Clothing	S	New	1965	2.8	Planned Centre
	Convenience	M	New	1965	10.3	Total 25.8
	Clothing	S	New	1966	7.3	
	L/Var.	S	New	1961	1.25	
	L/Var.	S	New	1964	1.25	
	L/Var.	S	New	1965	2.8	Planned Centre
Suburbs - Southern Suburbs	Garage	M	New	1964	7.3	Total 29.2
	L/Var.	S	New	1964	1.25	
	Convenience	M	New	1963	10.3	
	Convenience	M	New	1965	10.3	

Larger Firms Established or Relocated since 1962 according to area and type of firm (Contd.)

Area	Type of Firm	Subsid. or Main/ Only Branch	New Firm or Moved	Date of Location	Raising Factor	
Suburbs - Old Borough	Furniture	M	New	1966	2.8	Planned Centre
	Boutique	M	Moved	1963	2.8	Planned Centre
	Convenience	M	New	1966	12.1	Total
	Car Sales	M	New	1962	10.0	27.7
Peri-urban - Pinetown	Car Sales	M	New	1964	7.9	Total 17.8
	Car Sales	S	New	1964	7.9	
	L/Var.	S	New	1961	2.0	
Peri-urban - Outside Mun. Area	Convenience	M	New	1966	10.3	Total 18.2
	Carpets	M	New	1966	7.9	

The criteria of size decided upon for isolating larger firms might appear not to be very high. However, if only the very large firms had been selected, there would have been an insufficient statistical basis for any generalisation.

These results are once again subject to the limitation mentioned previously; we do not know whether the firms listed represent an increase in establishments or whether they replace firms which have gone out of business. The results are an indication of change.

It would appear that roughly the same number of larger firms are either newly established or relocated in the C.B.D. as in the Suburban areas. Our estimates are ± 125 for the Central Business District and ± 119 for Suburban areas. This would suggest that the suburbs are not growing any faster than the Central Business District.

In the different Suburban zones within the Municipal area, the number of newly established or newly relocated large firms appears to be roughly the same for all types of outlets. However, if we exclude motor garages, then it would seem that there has been slightly more development in Durban North than in other areas. The peri-urban areas appear to be exhibiting somewhat less change than the Municipal area; perhaps as one would expect considering the relatively smaller existing development in these outer zones.

A further impression obtained from these results is that the extent of change within the Central Business District appears to be fairly constant in the different zones, with the areas East of the "Inner Core" perhaps showing a slightly higher rate of change. The estimate for the Grey Street area is high but too statistically unreliable to allow any conclusion to be drawn. One can say with some degree of assurance that nothing spectacular is taking place in the Warwick, Berea, Umbilo complex since no larger firms recently established there have appeared in our sample.

The only completely clear and direct indication of growth in retail outlets in the various areas would be a comparison between the estimates of current numbers of establishments which our results provide and the numbers of establishments at some earlier date. A special tabulation of the results of the <u>Distribution Trade Census</u> of 1960/61[1] makes such a comparison possible. The comparison is unfortunately not as detailed as it might be due to difficulties in making the two sets of results completely comparable. Attempts to compare the results in terms of very detailed geographic categories failed due to too high a sampling error in the survey results. The one comparison which is possible and reliable is the following:

Comparison of Numbers of Establishments at Present and Numbers during the Financial Year 1960/61.

	Distribution Trade Census 1960/61	1966 Survey Results
Central Business District - Conv.	357	+430
- Durables	571	*959
- L/Var.	9	17
Old Borough Area - Conv.	602	+427
- Durables	174	*194
- L/Var.	-	1

1] The Town Planning Consultants to the Durban Corporation were able to obtain a special tabulation of the 1960/61 <u>Distribution Trade Census</u> for the Durban Magisterial District, and make the results available to the Institute.

Distribution Trade Census 1960/61			1966 Survey Results
Rest of Municipal Area	- Conv.	654	+804
	- Durables	114	*222
	- L/Var.	2	8

This comparison shows that the Central Business District is by no means a static area. In fact, during the period of comparison, convenience outlets in the C.B.D. have increased by 20% and durables and large variety stores by 70% and 89% respectively. These increases are only slightly lower than the increases in the outer municipal suburbs where convenience stores have increased by 23% and durables outlets by 95%.

The Old Borough area presents a far less dynamic picture, with durables firms having increased by only 11% and the number of convenience establishments having declined by some 23% (the latter probably being due to a number of smaller Indian shops having closed down over the period).

The fact that the number of durables outlets has increased so much more than convenience outlets is probably due in large measure to the establishment of large variety stores, particularly in the outer areas.

These comparisons tend to support our previous conclusion that very little decentralisation is taking place in Durban at this stage, except among large variety stores.

+ Excludes restaurants with no substantial retail selling activity.

* Excludes service stations, motor car dealers, office equipment distributions, motor spares firms, and suppliers of building materials.

V. SOME ASPECTS OF GROWTH AND CHANGES IN THE STRUCTURE OF RETAIL TRADE AND PERSONAL SERVICES IN DURBAN.

In this section we turn our attention to an examination of trends in the development and changes in the characteristics of retail trade and personal services in the Durban area.

(1) Growth and Changes in Employment.

In considering developments as regards employment, we refer the reader firstly to Table XV in Appendix A. This table gives estimates of growth in employment between the financial years 1960/61 and 1965/66. Estimates of growth have been calculated on the basis of statistics derived from the present survey (excluding personal services) and the results of the special tabulation of the results of the 1960/61 Distribution Trade Census which we have already referred to. The results of the present survey have had to be adjusted into order to make them comparable with the earlier Census findings[1].

The results of the comparison of the two sets of data, reflecting changes over a period of roughly five years, are quite self-explanatory and require only brief commentary. It would appear that employment in retail outlets in Durban has increased by roughly 60 per cent over the period. It seems quite clear that the increase has been greatest in the outlying suburban zones in the Municipal area, and that employment in the well-established Old Borough area has increased very little by comparison. While previous results have suggested that little decentralisation of firms is taking place, it would seem that firms in the more widely decentralised areas have expanded their employment more rapidly than firms in more centrally situated zones.

A rather surprising feature of these results is the

1] Data for motor car dealers, service stations, motor spares dealers, dealers in office equipment and building materials, and restaurants with no substantial retailing activity were subtracted from the survey findings. Comparisons are made only for the Durban Municipal area since the Census results do not cover the whole of the Metropolitan area.

relatively low increase in the number of Bantu Male employees compared with other races. This might be due to increasing shortages of Bantu workers due to factors such as influx control and the competing attractions of industrial employment. The fact that the increase in Bantu Male employment is highest in the Central Business District, where higher salaries are probably paid, might strengthen this argument.

Increases in the employment of White Males seem to have exceeded the increases in the employment of Coloured and Indian Males. However, this conclusion is tentative since it would seem that the figures for White Male employment in durables outlets in 1960/61 are abnormally low. We will return to this problem later.

Non-White Female employment has increased by very large proportions from very small bases in 1960/61. Particularly in the Central Business District and in the outer suburban areas a new trend towards the employment of Coloured and Indian women, and to a lesser extent Bantu women seems to have started during our period of comparison. White Female employment has increased somewhat more slowly than the average. This is surprising since one would imagine that the demand for White Female recruits is high. It is possible that the employment of increasing numbers of Non-White Females is due to a shortage of White Female recruits willing to work for the generally low salaries paid in retailing.

In Table XVI, comparisons between the same two sets of data are presented in a more detailed form. In addition, mean numbers of employees per firm for the two financial years have been calculated.

It would seem that in the Central Business District, the average number of Male employees per firm has remained reasonably constant over the period of comparison. The averages for Females would appear to have risen in convenience outlets, dropped in durables outlets, and increased in large variety stores.

In the Warwick/Berea/Umbilo/Old Borough areas it would seem that although the number of convenience outlets has dropped, the levels of Male employment have remained constant, while the average employment figure for Females has risen quite significantly. The reverse is true for durables outlets where Male employment has risen very sharply while Female employment has remained constant.

In the rest of the Municipal Area, Male employment has tended to remain constant in convenience outlets, while Female employment has risen. In durables outlets both Male and Female employment has risen significantly. With large variety stores there is no real basis for comparison since stores of the type which exist today were not in existence in 1960.

Broadly speaking therefore, it would seem that average Female employment within firms has risen among all types of firms except durables outlets in the Central Business District and central areas. Average Male employment within firms seems to have risen only in durables outlets outside the Central Business District.

Trends in employment by race tend to present a rather confusing picture, and a clearer trend emerges if we combine the different types of outlets. The following are the figures for average employment at the two financial years by race :
(These figures are derived directly from the results in Table XVI.)

		Mean No. of Workers per Firm	
		Census 60/61	Survey 1966
Central Business District			
Males	- White	1.36	1.39
	- Coloured	.05	-
	- Indian	1.60	2.11
	- Bantu	2.15	1.87
Females	- White	3.50	3.28
	- Coloured	.05	.16
	- Indian	.07	.24
	- Bantu	.13	.21
Warwick/Berea/Umbilo/Old Borough Area			
Males	- White	.52	1.34
	- Coloured	.02	.1
	- Indian	1.11	1.62
	- Bantu	1.93	2.17
Females	- White	.70	1.11
	- Coloured	.04	.13
	- Indian	.058	.20
	- Bantu	.050	.19

		Census 60/61	Survey 1966
Rest of Municipal Area			
Males	- White	.23	1.00
	- Coloured	.01	.08
	- Indian	.97	1.49
	- Bantu	1.38	1.14
Females	- White	.46	.54
	- Coloured	-	.17
	- Indian	.03	.24
	- Bantu	.03	.11
Entire Municipal Area			
Males	- White	.75	1.25
	- Coloured	.03	.05
	- Indian	1.25	1.81
	- Bantu	1.84	1.70
Females	- White	1.68	1.94
	- Coloured	.03	.16
	- Indian	.05	.23
	- Bantu	.07	.17

In the Durban Municipal area as a whole, the average numbers of White and Indian Male employees per firm have increased markedly over the period of comparison. The average for Bantu employees can be considered to have remained static. The increase in the average number of White Females per firm has been slight in comparison with the increases among White and Indian Males. Non-White Female employment averages within firms have increased markedly over the period; a trend which has already been discussed previously.

In the Central Business District, only the averages for Indian Male employees and Non-White Female employees have shown any significant increases. The average number of Whites per firm would appear to have remained fairly static over the period.

A characteristic of the change in the Warwick/Berea/Umbilo/Old Borough area seems to be that the average number of employees per firm has increased for all groups except perhaps Bantu Males.

In the rest of the Municipal area, it is once again the average number of Bantu Males per firm which tends to have dropped slightly while the averages for other Male employees have definitely risen. Firms do not appear to be employing White Females in any significantly greater numbers, but they do seem to be employing more Non-White Females on average.

The rather surprising finding that in most areas the average number of Bantu Male employees per firm has dropped over our period of comparison seems to be largely due to trends in employment in convenience outlets. The averages in durables outlets have increased. It is possible that it is particularly the small convenience outlets which find it increasingly difficult to compete with industry for Bantu recruits.

Finally, a word of caution seems necessary with regard to the results pertaining to White males. In durables outlets in the suburban Municipal area there were only fourteen White Males in employment in 1960/61, according to the Census results. This figure seems to be abnormally low in comparison with the estimate of just under 800 obtained from the current survey. Either a very remarkable trend has taken place (possibly involving the large scale replacement of Indian firms by White outlets) or the Census results are incorrect. Unfortunately, no further light can be shed on this problem at this stage.

Up to now we have been able to deal only with retail outlets. No strictly comparable Census material is available on personal services. In order to assess the growth in employment in this category we have to depend on the results of survey questions on employment in previous years. This suffers from the disadvantage that the information for previous years is not drawn from a representative sample of firms for the particular year. However, the material does merit inspection[1]. Results relating to personal service establishments are given in Table XVII in the Appendix. Also included are data on retail firms outside the Municipal area which were not included in the results of the 1960/61 Census of Distribution.

1] In extracting data on the previous employment in sampled establishments, care was taken to exclude those firms which were not in their present area at the particular year.

In looking at these results it should be remembered very clearly that the means presented for 1960 are not estimates of the true average employment among firms in 1960. They are estimates of the employment within firms in 1960 which are still in existence in the same areas today.

Very few of the differences in average employment at the two dates of comparison are significant. Certainly average White Female employment in the personal services in the Central Business District would appear to have increased very markedly, and to a somewhat lesser extent in the "frame" of the Central Business District as well.

In personal services, average Indian Male employment within firms would appear to have remained roughly constant. In the retail outlets on the periphery of the city however, a slight tendency may be noted for average numbers of Indian Male employees to have dropped.

Average Bantu Male employment within personal service firms would appear to have dropped over the period of comparison, particularly in the Warwick/Berea/Umbilo/Old Borough area, and in the peri-urban areas. There seems to be a fairly general tendency for average numbers of Bantu Female employees to have increased sharply in personal services in all areas.

A general characteristic of these results is that the averages presented for the two dates of comparison tend to be much more similar than is the case in the previous comparison between survey results and Census findings. This is largely due to the fact that changes within firms are probably more limited in extent than the real changes in the universe which would be largely due to changes in the composition of particular areas.

(2) Changes in the Physical Size of Firms in the Durban Area.

We have noted a fairly general tendency for the average numbers of employees per firm in the Durban area to have risen since 1960. Correspondingly, we would expect some increase in the average size of firms, measured in terms of gross floorspace and in terms of the square footage of sales or service area.

Unfortunately, no census material on the physical size of firms is available for comparison with the results obtained from the present survey. However, data collected from the sampled firms on floorspace characteristics at previous years does allow certain limited generalisations to be made.

In Tables XVIII to XXII in the Appendix, results are presented which relate past total floorspace of firms which were in existence in the same area as at present, to present total floorspace of firms within detailed areas in the city. [The past figures are expressed as a percentage of the present floorspace.]

The results suggest that there has been a very slight but steady increase in the average size of the firms studied over the years since 1951. The distribution of firms in the tables becomes more meaningful if we look at the Means of the percentage distributions at previous years:

SIZES OF FIRMS IN PREVIOUS YEARS EXPRESSED AS MEAN PERCENTAGES OF THE PRESENT TOTAL FLOORSPACE, IN DIFFERENT MAJOR AREAS.

[Based on firms which have not moved from one area to another in the relevant periods.]

Financial Year	Hard Core	Grey St.	Beach	Albert Park	Winder Street South	Winder Street North	Outside C.B.D.	All Firms (including firms which moved.)
1951/52	89.7	97.7	None exist	100.0	97.3	78.9	95.3	94.6
1958/59	89.3	98.5	99.8	105.1	99.5	91.6	95.7	95.9
1960/61	89.9	98.7	100.3	104.5	99.5	92.1	96.1	96.0
1962/63	95.6	98.1	100.2	103.5	99.5	97.5	97.6	97.7
1964/65	97.1	99.1	100.2	100.0	100.2	99.8	99.1	98.9
1965/66	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Note: These Means were calculated from the percentage distribution of firms in Tables XVIII to XXII.

In looking at these results, we must bear in mind that the sample becomes more and more unstable and unrepresentative as we go back in time, and that in earlier years we are probably dealing with a selected group of firms with higher "longevity" than might be typical. We should also bear in mind that at each financial year, the Mean proportions shown reflect not only the growth in size of firms included in the analysis of the previous financial years, but also the size of new firms which were established just before the financial year we may be interested in. Therefore, there are two factors accounting for the changes from financial year to financial year. Obviously, no statements can be made about the <u>actual average size of all firms</u> during past years. All we can do is assume that our sample is not entirely unrepresentative for past years and study the changes between the financial years as a rough indication of the growth or decline, bearing in mind that this is not the only factor influencing the results.

Naturally, the most reliable results would be for the entire sample of firms in the final column of percentages. From these results we may tentatively conclude that the periods of greatest increase in the physical size of firms have been between 1960/61 and 1962/63 and between 1964/65 and 1965/66. The periods before 1960 appear to have been characterised by relatively slight increases in the size of firms.

In the Hard Core area of the central city, a similar pattern of growth seems to have been taking place, with the periods between 1960/61 and 1962/63, and between 1964/65 and 1965/66 being apparently characterised by the most marked surges of growth.

The results for the other areas in the Central Business District must be treated with extreme caution. In these areas no distinct "growth periods" seem to be suggested by the results, except in the "Winder Street North", or "Motor town" [Frame] area, where the periods 1951/52 to 1958/59, and 1960/61 to 1962/63 appear to have been characterised by rapid growth in the floorspace of firms.

The combined area outside the Central Business District, shows a rather smooth pattern of growth compared with say, the Hard Core area. In the outlying area it would seem that the extent of growth in the physical size of firms increased after 1960/61 and thereafter maintained a fairly even pattern, up to the present.

Returning to the detailed results in the tables, it would seem that the Warwick, Berea, Umbilo area saw some fairly rapid growth in the size of firms up to 1960/61. Other areas where significant growth in the sizes of firms seems to have occurred are the Lower Berea and Southern Suburban areas. Other than these tentative conclusions no particularly significant patterns of growth in floorspace seem evident in the different suburban areas.

It appeared necessary to make an analysis similar to the one above of patterns of growth among different types of firms in the various major areas of Durban. Tabulated detailed results are presented in Tables XXIII to XXVII in the Appendix. Once again, the percentage distributions given in the tables do not make for easy analysis, and the Mean percentages of the present total floorspace presented below make the trends somewhat easier to recognise. Here we must repeat our earlier warnings that the sample becomes less and less adequate as the analysis is taken back in time.

MEAN PERCENTAGES OF PRESENT TOTAL FLOORSPACE IN PREVIOUS YEARS AMONG DIFFERENT TYPES OF FIRMS IN MAJOR AREAS.
[Based on firms which have not moved from one area to another in the relevant periods.]

Hard Core:

	P/S	Conv.	L/Dur.	S/Dur.	L/Var.
1951/52	86.2	N.I.	77.1	89.3	79.0
1958/59	95.2	N.I.	85.8	87.5	94.9
1960/61	88.5	N.I.	84.2	89.7	98.9
1962/63	100.6	100.0	91.6	93.1	99.6
1964/65	97.6	100.0	97.6	96.5	100.0
1965/66	100.0	100.0	100.0	100.0	100.0

Grey Street:

	P/S	Conv.	Dur.
1951/52	100.0	100.0	94.3
1958/59	100.0	100.0	96.8
1960/61	100.0	100.0	97.1
1962/63	100.0	90.6	100.0
1964/65	96.2	99.2	100.0
1965/66	100.0	100.0	100.0

Rest of Central Business District:

	P/S	Conv.	L/Dur.	S/Dur.	L/Var.
1951/52	100.0	100.0	98.6	84.2	N.I.
1958/59	100.4	101.8	93.8	92.3	N.I.
1960/61	100.4	101.8	88.8	95.3	N.I.
1962/63	100.4	101.5	94.0	100.0	N.I.
1964/65	100.2	100.0	99.6	100.0	N.I.
1965/66	100.0	100.0	100.0	100.0	100.0

Warwick/Berea/Umbilo/Old Borough:

	P/S	Conv.	Dur.	L/Var.
1951/52	78.8	97.4	72.6	100.0
1958/59	100.0	93.9	84.3	100.0
1960/61	100.0	94.7	90.0	100.0
1962/63	100.0	98.5	94.4	100.0
1964/65	99.4	101.7	100.0	100.0
1965/66	100.0	100.0	100.0	100.0

Rest of Municipal Area:

	P/S	Conv.	Dur.	L/Var.
1951/52	100.0	100.0	100.0	100.0
1958/59	100.0	99.4	90.7	100.0
1960/61	100.0	97.6	92.1	81.5
1962/63	100.0	97.1	94.2	100.0
1964/65	99.3	98.3	97.0	100.0
1965/66	100.0	100.0	100.0	100.0

Outside Municipal Area:

	P/S	Conv.	Dur.	L/Var.
1951/52	100.0	71.7	N.I.	92.0
1958/59	100.0	100.0	100.0	92.0
1960/61	100.0	97.7	100.0	96.0
1962/63	100.0	96.2	100.0	96.0
1964/65	100.0	94.7	100.0	100.0
1965/66	100.0	100.0	100.0	100.0

The results for type of firm present a far more confusing picture than those discussed above, mainly due to the instability attendant on the smaller numbers of sample cases in each category.

In some categories, the Mean percentages fluctuate quite widely over the period of analysis. In the category of Personal Services in the Hard Core, for example, the Mean percentage increases after 1951/52, then decreases, then increases again, only to decrease again at 1964/65. This type of fluctuation in fact means that just before the financial years 1960/61 and 1964/65, several firms were established which were to increase in physical size quite markedly during ensuing financial years. This is the great disadvantage of basing results on a sample which becomes increasingly attenuated as the analysis is carried back in time. For this reason, no particularly detailed conclusions can be drawn from the results presented above. A rather more impressionistic treatment of these figures is appropriate here.

In the Hard Core area of Durban, large and small durables stores would appear to have increased fairly steadily in size over the entire period of analysis, whereas convenience outlets would appear to have remained unaltered in size. Among large variety stores, the period of greatest growth seems to have been between 1951/52 and 1960/61, with relatively slight increases in size thereafter. Very little can be said about the personal service establishments, other than that there would seem to have been significant growth between 1960/61 and 1962/63.

In the Grey Street Area the only expansion in size would appear to have been among durables outlets in the period before 1962/63. The same conclusion can be applied to the results for small durables outlets in the Rest of the Central Business District, which show an even more marked pattern of expansion before 1960/61. Among large durables outlets in the Rest of the Central Business District, there would appear to have been an influx of establishments between 1951/52 and 1961/62 which have subsequently expanded in size. Among personal services and convenience outlets there might have been a slight decrease in the averages for firms over the period from 1958/59 onwards.

In the Warwick/Berea/Umbilo/Old Borough Area, personal services appear to have remained fairly static in size, whereas among convenience outlets, there would appear to have been an influx of smaller establishments between 1951/52 and 1960/61. Hereafter, some expansion seems to have taken place up to 1964/65 after which a slight decrease in average size might have occurred.

In the Rest of the Municipal Area there would seem to have been fairly steady growth in size among durables outlets after 1958/59, while other types of establishments present a fairly static picture. Outside the Municipal Area there seems to have been a sudden increase in the size of convenience outlets between 1951/52 and 1958/59 and between 1964/65 and 1965/66, and two periods of expansion in floorspace among large variety stores: 1958/59 to 1960/61 and 1962/63 to 1964/65.

In addition to considering patterns of growth in the total floorspace of firms, it is also important to assess the extent to which the ratio between sales area to total floorspace might or might not have been changing. It would appear to be logical that where firms are faced with an expansion in trade or demand, but have no room to expand in physical size, the problems might be overcome by utilising more and more of the total area for sales purposes. However, looking at the results in Tables XXVIII to XXXII in the Appendix would not suggest that this has been the case at all. No significant differences in the percentages which sales/service area constituted of total floorspace at the different years seem to emerge.

To illustrate this more clearly we present below, a schedule of the Mean percentages which sales area constituted of total floorspace in various parts of town for the different years:

SCHEDULE OF MEAN PERCENTAGES OF SALES/SERVICE AREA OF TOTAL FLOORSPACE AT PREVIOUS YEARS IN MAJOR AREAS OF THE CITY.

	1964/5	1962/3	1960/1	1958/9	1951/2
Hard Core	72.1	70.7	71.5	69.5	71.6
Grey Street	73.1	75.8	76.9	78.1	80.5
Beachfront	78.7	81.5	80.6	80.6	N.I.
Albert Park	61.5	58.6	57.1	57.1	50.6
Winder St. South	75.4	72.0	69.5	69.5	68.6
Winder St. North	62.6	65.0	67.0	66.1	66.0
Outside C.B.D.	68.4	68.2	67.8	65.8	66.6
All areas	70.0	70.5	70.7	69.8	71.1

It will be noticed from these results that the fluctuations are very slight and cannot be taken to mean very much. Apart from the Grey Street area, where there might have been a tendency over the past 18 years for firms to use less and less of their total area for sales purposes, it would appear as if the ratio of sales/service area to total floorspace has remained fairly constant over the years.

(3) Changes in the Value of Sales or Services of Firms in the Durban Area.

Since average numbers of employees in firms in Durban have tended to rise over the years since 1960, and there has been a slight but consistent tendency for firms to have increased in physical size, we would also expect general increases in the average financial turnover of firms.

In studying trends with regard to average turnover figures, we are fortunate in having earlier census material to compare with the results of the present survey, namely the results of the 1960/61 Census of Retail and Wholesale Distributive Trade. In the schedule below we present comparisons between the Means based on the two sets of results:

SCHEDULE OF COMPARISONS BETWEEN MEAN VALUE OF SALES[1] DURING 1965/66 AND AT CENSUS YEAR 1960/61, ACCORDING TO THE TYPE OF RETAIL FIRM AND MAJOR AREAS.

		1960/61	1965/66	% increase
C.B.D.	: Conv.	R 40,653	51,067	25.6
	: Dur.	62,180	77,059	23.9
	: L/Var.	1,780,000	2,370,600	33.2
Central	: Conv.	40,890	47,866	17.1
	: Dur.	36,224	74,379	105.3
	: L/Var.	-	1,043,365	-
Rest Mun. Area	: Conv.	30,200	28,930	-4.2
	: Dur.	25,737	28,502	10.7
	: L/Var.	202,500	402,672	98.9

1] The Means for 1965/66 were calculated from results of the present survey with motor sales firms, motor spares firms, office equipment firms, restaurants, etc., excluded. Means for 1960/61 were calculated from results of the Census of Distributive Trade: 1960/61.

Before studying the results above we should caution ourselves once again by considering the fact of the high rates of non-response to the questions on turnover. The numbers of sample cases on which the means for 1965/66 are based have been reduced even further by the exclusion of those firms not included in the census. Therefore, the conclusions we can draw have to be considered tentative.

In the C.B.D., the percentage increases among all types of firms are more than double the percentage increase in the Consumer Price Index for Durban[1] over the same period. This would suggest that a definite increase in the trading activity of firms has taken place since 1960. Furthermore, it would seem that large variety stores have increased significantly more than convenience or durables outlets.

In the Central area the staggering increase in average turnover among durable goods outlets might be due in part to sampling error, since the numbers of firms on which the result is based is not large. However, one must conclude that this is probably a category which has seen considerable growth over the period. The percentage increase among convenience outlets reflects a more normal trend.

Other results have suggested that the Rest of the Municipal Area is not an area which has been characterised by much dynamic growth. The present results bear this out as well. Only among large variety stores has the average turnover increased by more than the increase in the Consumer Price Index, and this is undoubtedly because large variety stores are a new type of development in the suburbs.

Unfortunately, no more refined comparisons between the census material and present results are possible, due mainly to limitations in both sets of data.

In the present survey, information was elicited on turnover at previous financial years, and these data have been tabulated in a form where earlier values of sales or services are expressed as a percentage of the value of

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1] The consumer price index rose by approximately 11.1% over the period 1960 to 1965.

sales at 1965/66. This material suffers from all the limitations of the material on square footage of firms at previous years, which we have already referred to[1]. In addition, the questions on turnover had a high non-response rate, which serves to aggravate the limitations which already exist. However, if analysed very cautiously, the material can provide certain tentative insights.

In Tables XXXIII to XXXV in the Appendix we present tabulated results on the percentage distribution of firms in terms of their turnover at earlier years in relation to their value of sales during 1965/66. The data are tabulated according to type of establishment in major ecological sones. In this analysis it proved pointless to include tabulations of the value of sales or services before 1960/61, since the samples in each category were totally inadequate. The year 1960/61 is included (Table XXXV), but even here the data is not suitable for analysis. We have included this table simply as a record.

Tables XXXIII and XXXIV do allow certain limited generalisations to be made in certain categories. It would seem, for example, that the value of sales among large durables outlets in the Hard Core have increased more since 1962/63 than either the value of sales among small durables or large variety stores. In the Grey Street Area, durables firms have expanded their activities more than other types of firms.

With respect to the Rest of the Central Business District, large durables firms once again seem to have increased their sales more than other types of outlets, and the same conclusion might be applied to the durables firms in the Warwick/Umbilo/Berea/Old Borough area.

In the area outside the Municipal boundary, both durables and convenience firms would appear to have increased their sales to a notable extent. Although large variety stores on the perimeter of the city would appear to have expanded their sales quite markedly, the sample is too

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1] Here we refer once again to the fact that the sample becomes attenuated as regards data for previous years, and that sample cases in existence at previous years might be a selected group of cases.

small to be able to state this conclusion firmly.

Perhaps a more adequate approach to this material would be to make no attempt to distinguish between types of firms, and to maximise the sample sizes by simply comparing different areas of the city. In this way it is also possible to consider material for the years prior to 1960. In the schedule below we present Mean percentages of past in relation to present turnover for major areas over a period from 1950/51 to the present:

SCHEDULE OF MEAN PERCENTAGES OF PAST VALUE OF SALES/ SERVICES AS PERCENTAGES OF VALUE OF SALES AT 1965/66, ACCORDING TO MAJOR AREAS OF THE CITY.

	Hard Core	Grey Street	Rest of C.B.D.	Outside C.B.D.
1950/51	67.2	57.5	72.8	63.4
1958/59	81.5	61.6	72.9	81.3
1960/61	76.9	69.4	75.1	83.3
1962/63	81.2	79.5	80.2	84.5
1963/64	85.7	87.4	88.7	89.8
1964/65	92.1	94.2	93.9	98.1
1965/66	100.0	100.0	100.0	100.0

Note: The Means in this schedule have been calculated from data which has not been presented in a detailed tabulated form in the Appendix. These tabulations were omitted because the detailed results for years prior to 1962/63 are statistically unsignificant.

From this schedule of Mean percentages, certain broad trends do emerge. It would seem, for example, that the period of the most rapid growth in turnover generally has been the period between 1962/63 and 1965/66. However, in the areas outside the Central Business District, there has apparently been only very slight growth since 1964/65, in contrast to the sustained growth during this period in the Central Business District. The period before 1962/63 seems to have been characterised by fairly slack growth in all areas except the Grey Street area, where the value of sales would appear to have increased quite substantially from 1958/59 to 1962/63.

Generally speaking, the growth in turnover in the Central Business District since 1962/63 seems to have slightly outstripped the growth in the areas outside the Central Business District, due probably to the influence of the slow growth in the outer Municipal suburbs of Durban.

(4) Changes in the Relationship between Employment, Floorspace, and Turnover in the Durban Municipal Area.

Here we should state at the outset that this analysis is limited to the Durban Municipal Area because no census material comparable with the results of the present survey is available for all the outlying local authorities. It was decided to use only the census material for calculating ratios between the three variables mentioned, mainly because of the fact that sampling error is multiplied in this type of calculation. Bearing in mind that our results for earlier years are based on small numbers of possibly selected firms, the problem of sampling error was a major consideration in this analysis. In fact, these factors prevented any analysis being made of changes in the relationships between the variables mentioned for any refined zones within the Central Business District. However crude the material we do analyse appears to be, it is unfortunately the only data on which statistical reliance can be placed, and it can therefore at least be guaranteed not to mislead anyone wishing to make use of our conclusions.

One indication of how intensively a firm makes use of its floorspace is given by the ratio of floorspace to employment. In the schedule below we present the average amount of total floorspace per employee in various major categories of retail firms[1].

It will be noted that in the Central Business District, durables outlets appear to have the lowest number of employees per given amount of floorspace at present. This was not the case in 1960/61 however, when the ratios for durables and convenience firms were virtually identical. Since 1960/61, convenience and large variety firms have tended to make increasingly intensive use of available space

1] Personal Service establishments could not be included since these were not among the firms enumerated in the 1960/61 Census of Distributive Trade. The analysis is only for those retail firms which were included in the census results. The type of firms which are excluded have been mentioned previously.

AVERAGE TOTAL SQUARE FOOTAGE PER SINGLE EMPLOYEE AMONG RETAIL OUTLETS IN DURBAN FOR THE FINANCIAL YEARS 1965/66 AND 1960/61.

		1960/61		1965/66
C.B.D.	- Conv. :	258.9	Sq. ft. per employee	235.1
	- Dur. :	257.2		301.3
	- L/Var. :	303.9		265.9
Central	- Conv. :	275.3		238.1
	- Dur. :	767.9		429.8
Rest of Mun. Area	- Conv. :	350.7		300.8
	- Dur. :	577.8		231.2
	- L/Var. :	326.5		668.2

by increasing the number of staff in relation to physical area. This is not so among durables outlets where the reverse seems to have occurred.

In the Old Borough, or Central area, all types of firms, and particularly durables firms, have increased staff in relation to floorspace. At present the durables firms in this area appear to have particularly low employment in relation to floorspace.

In the Rest of the Municipal Area, a trend towards a greater number of employees in relation to floorspace has also occurred, except in the case of large variety stores. Here, however, the ratio for 1960/61 is based on only two firms, and obviously a different type of suburban large variety store has come into existence since 1960; a type which tends to offer extensive self-service facilities. The large variety stores in the outlying municipal suburbs have by far the lowest number of employees in relation to floorspace of all categories of firms in Durban. The great change which has occurred in the category of durables goods in the Rest of the Municipal Area is probably artificial, and possibly due to a mistake in the census figures where extraordinarily low numbers of White males seem to have been recorded. This problem has been discussed earlier in the report as well.

Since a general trend towards increased employment in relation to floorspace is apparent, it is of interest to see how the relationship between value of sales and employment has changed since 1960/61. The relevant ratios are presented in the schedule below:

AVERAGE VALUE OF SALES PER SINGLE EMPLOYEE AT 1965/66 AND 1960/61, AMONG RETAIL OUTLETS IN MAJOR AREAS OF MUNICIPAL DURBAN.

			1960/61	1965/66
C.B.D.	- Conv.	:	R 9,726 per employee	R11,199
	- Dur.	:	8,160	11,040
	- L/Var.	:	6,380	7,351
Central	- Conv.	:	9,806	9,404
	- Dur.	:	6,874	7,401
Rest of Mun. Area	- Conv.	:	10,134	8,126
	- Dur.	:	8,170	3,310
	- L/Var.	:	4,602	15,264

In the Central Business District, all types of retail firms would appear to have increased their value of sales in relation to employees. However, among convenience and large variety stores, the percentage increase (roughly 15%) is only slightly in excess of the percentage increase in the consumer price index, and we should also remember that the slight real increase in turnover would also have to cover increases in wages. The figures for these types of firms would not suggest any marked increase in the profitability of the undertakings. This is not so among durables outlets however, where the percentage increase in turnover in relation to employees is quite considerable (± 35%) and probably does indicate increased profitability of the undertakings. (Naturally, these conclusions regarding profitability are superficial, and do not take hosts of other cost increases into account.)

In the Old Borough area, the turnover in relation to employment has decreased among convenience stores and only increased by roughly 8% among durables outlets. Developments in this area have obviously not been as favourable as they appear to have been in the Central Business District.

In the Rest of the Municipal Area, the average turnover in relation to employment would also appear to have decreased, except in the case of large variety stores, where special factors probably account for the spectacular increase (for example, the recent development of modern self-service variety stores). The rather radical apparent decrease in turnover in relation to employment among durables outlets in the outer municipal suburbs is to be regarded with extreme caution, since, as said before, employment might have been under-enumerated during the 1960/61 Census.

The results above also allow some interesting generalisations to be made regarding the present differences in turnover in relation to employment among different categories of firms. By far the most apparently profitable utilisation of staff occurs in the large variety stores in the suburbs, followed by the convenience and durables outlets in the Central Business District. The large variety stores in the Central Business District show a surprisingly low turnover in relation to staff. Generally speaking, it would seem that durables outlets outside the Central Business District have extremely low average turnover in relation to employment.

Another rough index of the profitability of firms would be the ratio of the value of sales in relation to the floorspace of firms. Ratios of sales to square footage are presented in the following schedule:

AVERAGE VALUE OF SALES PER SQUARE FOOT OF TOTAL FLOORSPACE AMONG RETAIL FIRMS IN MAJOR ZONES IN DURBAN.

		1960/61	1965/66
C.B.D.	- Conv. :	R37.60 per sq. ft.	R47.60
	- Dur. :	31.60	36.60
	- L/Var. :	21.00	27.60
Central	- Conv. :	35.60	39.50
	- Dur. :	9.00	17.20
Rest of Mun. Area	- Conv. :	28.90	27.00
	- Dur. :	14.10	14.30
	- L/Var. :	14.10	22.80

In the Central Business District, all types of firms appear to have increased turnover in relation to floorspace. Among convenience and large variety stores, the percentage increase (27% and 31% respectively) are well in excess of the increase in the Consumer Price Index. Even durables firms have shown an increase which is slightly in excess of the increase in the Price Index.

In the Old Borough area, the increase in turnover in relation to floorspace among convenience stores is slight (11%), but the increase among durables stores appears to have been phenomenal (91%). In the outlying municipal suburbs, there has been no increase in the turnover to floorspace ratio, except in large variety stores, where, as we would expect from previous results, the increase in turnover in relation to space has been considerable (62%).

At present, convenience stores would appear to have the highest turnovers in relation to space in each major area. Durables goods firms present a more favourable ratio than large variety stores in the Central Business District, but outside of the Central Business District, the value of sales of durables goods is comparatively low in relation to the size of premises.

It might be of interest to obtain a rough combined index of the intensity of selling activity in relation to both employment and floorspace among different categories of firms at present. By multiplying the ratios of turnover to staff by the ratios of turnover to floorspace, the following rank ordering of firms is obtained:

Central Business District	:	Convenience	(553072)
Central Business District	:	Durables	(404064)
Central	:	Convenience	(371458)
Rest of Municipal Area	:	L/Variety	(348019)
Rest of Municipal Area	:	Convenience	(219402)
Central Business District	:	L/Variety	(202888)
Central	:	Durables	(127297)
Rest of Municipal Area	:	Durables	(47333)

This rank ordering would suggest that selling activity is most intense in the Central Business District, followed by the Central or Old Borough area. It would also suggest that convenience firms are busier than durables outlets within all areas. The results do also show that the large variety stores in the outlying municipal suburbs are apparently doing very well indeed insofar as turnover in relation to staff and space is concerned.

These results are interesting, and certain definite trends do appear to exist. In translating the results into any conclusions as regards the profitability of different types of firms one should be very cautious however. Obviously the results do not take profit margins on different types of goods sold into account, and there are many other factors like interest and redemption on land and property, rentals, taxes, and differential wages and salaries which should also be considered.

VI. PROBABLE PATTERNS OF FUTURE GROWTH AND DEVELOPMENT.

Predicting future events and future trends is always a rather hazardous undertaking in most spheres of economics and social science. Nevertheless, adequate planning always does require that some estimates of future developments be made, and whatever indications of future trends which are available have to be taken into account in making these predictions.

The present study, being an investigation at one point in time, does not provide the sort of results to which time series projections of future events can be applied. Hence most of the predictions of future development in retail trade and personal services in Durban have had to be made on the basis of the estimates and opinions of the respondents themselves. We do not know how astute Durban's retailers are in judging the pattern of future events. Impressions gleaned during the fieldwork suggested a rather varied pattern of abilities in this respect. Nevertheless, as the people who are closest to the ongoing trends in retailing activity, our respondents probably know more than we do about their business futures. In the following sections therefore, we attempt to analyse some of their predictions systematically.

(1) Pattern and Nature of Probable Future Increases in Physical Size of Firms.

In this section we will start with a fairly general analysis of probable trends, and follow this with more quantitative procedures for assessing likely increases in actual floorspace in various zones of the city. Both approaches are based on the respondents' own assessments of their future floorspace requirements and their own statements regarding methods of acquiring increased space.

In Table XXXVI in the Appendix, results are presented giving the percentages of firms where it is intended to increase the size of premises by particular amounts.

Among all firms in the Durban area, some 16 per cent appear to be due to increase in physical size at some future date. The Mean increase intended is slightly under 100%[1] of th

1] The exact Mean calculated from the tabulation is 97.5%.

present floorspace of firms where increases are intended.

In the Hard Core area, it seems quite apparent that a greater proportion of large variety establishments than any other type will probably acquire additional floorspace. An estimated two large variety stores will increase in size by more than 100%. Large durables outlets have the lowest proportion of firms where increases are intended. No significant differences emerge between the other types of firms. It is interesting to note that among firms other than large variety stores, no intended increase is likely to be less than 25% of the present floorspace.

Somewhat surprisingly, in the Grey Street area, a generally slightly higher proportion of firms appear to be due to acquire additional floorspace, but the intended proportional increases are slightly less ambitious than in the Hard Core area generally. However, if the results are trustworthy, the category of personal services in Grey Street seems due for quite considerable expansion in physical size.

Generally speaking, the results for the Rest of the Central Business District suggest that lower proportions of firms are due to acquire additional floorspace than is the case either in the Hard Core or Grey Street. The increases that are intended are more modest in convenience outlets than in the durables categories.

In the Old Borough area, a very slightly larger proportion of firms intend increasing their floorspace than in either the Hard Core or the Rest of the Central Business District. Among those firms where changes are intended, a fairly even spread of small and large increases are anticipated.

In the Rest of the Municipal Area, increases in floorspace are anticipated in a fairly large proportion of convenience outlets, and the size of the increases intended would appear not to be inconsiderable. Here we probably have to do with a definite growth category.

The same conclusion could apply to a somewhat lesser extent to the retail outlets outside the Municipal area, and on the whole, slightly more growth is anticipated here than is the case elsewhere.

One fairly clear conclusion to be derived from the results for the areas outside the Central Business District is that personal service establishments are less likely to expand in size than other types of firms.

No more refined analysis of Table XXXVI is indicated at this stage. Not much could be done in the way of quantitative manipulation of the data since these results do not give any indication as to whether the firms where increases are intended are larger or smaller than the average for the particular category. Since somewhat less than 20% of all firms are involved, it would be hazardous to assume that they are entirely typical of all firms. Therefore, computed Means of percentage increases cannot be used as a basis for estimating future floorspace. A somewhat different procedure will be adopted for this purpose later in this section.

In Table XXXVII in the Appendix, we present a distribution of the times of intended increases in floorspace. Among all firms in Durban where increases are intended, the approximate Mean time of intended increase is one year from the date at which most interviewing took place. However, the distribution is skewed towards more immediate dates, and therefore we can conclude that if our results are completely valid, most of the intended increased floorspace has already been acquired. Nevertheless, it should be remembered that the need for increased floorspace is not likely to be a static phenomenon, and that the same pattern of results would probably emerge if the fieldwork was repeated now. We may therefore conclude that roughly two-thirds of the firms presently intending to acquire additional floorspace, would acquire it within one year from now[1].

In the Hard Core, personal service and convenience firms appear to intend adding floorspace immediately. Large variety and large durables firms intend expanding in more than three years time, while small durables firms will expand earlier; namely in one to two years time.

1] The exact Mean time of intended increase is 11.9 months from date of interview. 10.1% out of the 14.3% intending to increase will increase within one year.

Virtually all the expansion in the Grey Street area is intended to take place in less than two years time, much of it immediately.

Plans for expansion among convenience and small durables outlets in the Rest of the Central Business District are almost immediate, while expansion among large durables outlets is to be delayed for two to three years.

On the other hand, durables outlets in the Old Borough area are likely to expand within one year, mostly in the first six month period. On average, convenience firms plan their expansion a little later; most of it to take place in roughly one year's time. The expansion in personal services will probably take place one year later.

In the Rest of the Municipal area, among convenience outlets, all planned expansion is due to take place before three years have elapsed, but with the bulk of it planned within the first year. Much the same position exists with regard to durables outlets. Large variety firms only plan to extend their premises in three to four years time.

Outside the Municipal area, all firms except large variety stores plan to increase the size of their premises within the first year, whereas the expansion of large variety stores will all take place between six and twenty-four months time.

Detailed information on the methods respondents intend using to gain additional space will be given somewhat later in this section when we deal with the quantitative analysis of future growth in floorspace.

However, at this stage we will look briefly at the general patterns which held in regard to methods of gaining additional space. In Table XXXVIII results are presented which relate the extent of the additions intended to the methods to be used, among the sample as a whole.

Among all firms, the following are the proportions intending to use various different means of acquiring additional space (or in a minority of cases, as a means of re-utilising the same basic floorspace more effectively[1]).

1] Attention should be drawn to the fact that in a number of cases respondents had plans to alter the ratio of floorspace to sales area which would not materially affect the total floorspace. This explains the percentages in the last row of the table (no change).

Extend premises within present site :	30%
Move to larger site or premises :	20%
Occupy premises next door in addition to present premises :	19%
Build on vacant adjoining site :	5%
Build above premises :	2%
Occupy premises elsewhere in same building :	2%
Other (occupy or lease additional space elsewhere) :	11%
No information	11%
	100%

The average gains in floorspace resulting from the different proposed methods differ quite significantly. The following are the Mean percentage additions to present floorspace for each of the various methods to be employed:

Move to larger site/premises :	163.7% increase
Build above premises :	147.2% increase
Other diverse means (leasing additional premises, or leasing additional workshops, storage etc. elsewhere in town) :	146.4% increase
Occupy adjoining premises :	69.0% increase
Build on vacant adjoining site :	65.9% increase
Extend within present site :	53.9% increase
Occupy premises elsewhere in same building :	23.3% increase
Average of all methods :	97.5% increase

By weighting the percentage increases resulting from each means of acquiring additional space by the proportion of firms intending to adopt the various methods, we obtain some idea of the relative effects which the various methods of acquiring additional space are likely to have on expansion in the city. This is a very rough procedure since it assumes that the average present floorspace of firms intending to use the various methods is roughly the same, which need not necessarily be so at all. However, as a rough guide we present the following weights:

Move to larger site or premises :	3270
Extend within existing premises :	1620
Other (mainly leasing additional premises elsewhere) :	1610
Occupy adjoining premises :	1310
Build on adjoining site :	330
Build above premises :	290
Occupy premises elsewhere in building :	50

None of the previous analyses enabled any estimates to be made of the amount of actual floorspace involved in plans for future expansion. In each case the analysis was in terms of percentage increases without any reference to the base-lines of present floorspace. Therefore, a hand tabulation was carried out to furnish more exact information, and the results are presented below. In the schedule of estimated increases in floorspace, the amounts to be obtained by different means are specified separately as follows:

(1) = Plans to extend into or occupy next-door premises or premises in the same building.
(2) = Plans to occupy additional premises elsewhere.
(3) = Plans to move entire business elsewhere.
(4) = Plans to extend on present site or to build above present premises.
(5) = Plans to build an extension on an adjoining site.
(6) = Plans to build new premises elsewhere.

Schedule of Estimated Future Increases in Total Floorspace According to Area, Type of Firm, and Date at which Increased Space will have been acquired. (all figures in sq. ft.)

HARD CORE	- Personal Service:	up to 1970:	2,436	(1)
		up to 1970:	7,064	(2)
	- Convenience:	up to 1970:	10,800	(4)
	- L. Durables:	up to 1970:	11,550	(1)
		up to 1970:	13,750	(2)
	- S. Durables:	up to 1970:	15,900	(2)
		up to 1970:	9,010	(3)
	- Large Var.:	up to 1970:	16,400	(1)
		1971/1972:	196,000	(5)
GREY STREET	- Personal Service:	up to 1970:	5,768	(3)
	- Convenience:	up to 1970:	17,150	(1)
	- Durables:	up to 1970:	1,470	(4)
BEACHFRONT	- NIL			
ALBERT PARK	- L. Durables:	up to 1970:	22,000	(2)
WINDER ST. NORTH	- Convenience:	1971/1972:	4,860	(3)
	- S. Durables:	up to 1970:	19,080	(1)
WINDER ST. SOUTH	- NIL			
WARWICK/BEREA/ UMBILO	- Personal Service:	up to 1970:	23,500	(1)
	- Convenience:	up to 1970:	48,100	(3)

CENTRAL (OLD BOROUGH)	- Personal Service:	up to 1970:	1,500	(3)
	- Convenience:	up to 1970:	24,200	(3)
		up to 1970:	15,700	(5)
	- Durables:	up to 1970:	71,582	(1)
		up to 1970:	196,000	(3)
		up to 1970:	12,600	(6)
REST, MUNICIPAL AREA (SOUTH)	- Convenience:	up to 1970:	48,100	(1)
		up to 1970:	48,100	(2)
		up to 1970:	10,403	(4)
	- Durables:	up to 1970:	10,950	(1)
		up to 1970:	18,250	(5)
		1971/72:	18,250	(5)
	- Large Var.:	1971/72:	15,600	(4)
REST, MUNICIPAL AREA (WEST)	- Convenience:	up to 1970:	9,315	(4)
	- Durables:	up to 1970:	3,140	(4)
OUTSIDE MUN. AREA (SOUTH)	- Convenience:	up to 1970:	51,500	(4)
		up to 1970:	10,300	(5)
	- Durables:	up to 1970:	4,740	(1)
		up to 1970:	3,950	(3)
OUTSIDE MUN. AREA (WEST)	- Convenience:	up to 1970:	3,708	(5)
	- Durables:	up to 1970:	27,650	(4)
		up to 1970:	94,800	(5)
	- Large Var.:	up to 1970:	12,000	(4)
		up to 1970:	20,000	(5)

No more general summary of the data presented above need be attempted since it would probably be most useful to planners in a fairly detailed form. It should be noted here that it would not be justified to add the estimated increases presented above to the present estimated floorspace totals to arrive at any new total for 1970 (or 1972). Obviously, future total floorspace will also be affected by new firms coming into existence which are not reflected in the figures above.

It should also be borne in mind that the estimates presented are based on a very detailed breakdown of sample cases, and it is strongly recommended that, where possible, categories be combined in order to minimize sampling error.

Finally, it should also be remembered that plans to increase floorspace are not a static phenomenon. Therefore, the figures presented can be moved one and a half years ahead, as it were, in order to be able to estimate likely future increases after April 1968.

(2) Probable Future Increases in the Value of Sales or Services among Firms in Metropolitan Durban.

In predicting what the future would hold with regard to the financial turnover of their firms, respondents in the present survey spoke with somewhat less assurance than that with which they were able to predict increases in floorspace. The possibility cannot be excluded that in some cases, the answers obtained were partly in the nature of wish-fulfilment. However, in the vast majority of cases, we were satisfied that the respondents were hard-headed enough to make realistic estimates of future increases in sales.

Understandably, a considerable proportion of respondents found it impossible to make predictions of this nature, particularly when asked to estimate increases in sales up to the financial year 1970/71. Some 17% of respondents found this prediction of growth in turnover four years into the future impossible to make. It is impossible to say whether the firms included in this 17% are a selected group or not. A perusal of the schedules would suggest, however, that it is not the firms as such, but the individual respondents who are a selected group. Some individuals baulk at making guesses, while others do not, and the grounds for this difference in behaviour are usually psychological. In Table XXXIX in the Appendix we present the results relevant to this question. The results are presented in the form of percentages of present turnover, and the present value of money is assumed to remain constant.

In the Hard Core of the Central Business District, no significant differences between types of firms emerge other than that the convenience firms anticipate slower growth than other types of firms. In the Grey Street area, personal service firms seem very optimistic as regards future turnover, while durables firms seem distinctly pessimistic compared with other firms generally.

In the Rest of the Central Business District, large durables firms appear to anticipate considerably higher growth in turnover than any other firms, except for the three large variety stores. Differences between the other types of establishment do not seem particularly significant.

Personal service and durables firms in the Old Borough area seem to expect significantly greater increases in sales than the convenience firms in the same area. In the rest of the Municipal area, however, personal service firms are the only ones which anticipate comparatively slight increases in sales. In the areas outside the Municipal boundary, all firms seem to anticipate rapid growth in turnover, with the large variety stores showing perhaps slightly less optimism than the others.

If we group all types of firms together then the following weighted averages of predictions for 1970/71 are obtained for the different areas:

Hard Core	:	135
Grey Street	:	132
Rest of C.B.D.	:	130
Old Borough	:	143
Rest of Municipal Area	:	147
Outside Municipal Area	:	152

From the averages it would seem quite clear that there is a tendency for greater increases in turnover by 1970/71 to be expected the further away the firm is from the Central Business District. Within the Central Business District, firms in the Hard Core area would seem to be slightly more optimistic than firms in the Frame.

In order to use the respondents predictions of future growth in sales to arrive at a rough trend-line of growth over the years since 1960/61, the data were manipulated in the following way. The averages obtained from the 1960/61 Census of Distributive Trade were all multiplied by 111.04% (the growth in the Consumer Price Index between 1960 and 1965), in order to make the figures roughly comparable with the averages calculated from the results of the present survey. The resulting corrected Means for 1960/61 were taken as 100, and the 1965/66 averages as well as the predictions of future growth were expressed in relation to this base of 100 in 1960/61. The differences between the indexes at the various years were divided by the number of years which had elapsed (or were to elapse) in order to make the growth and the predicted growth simpler to evaluate. The results of this exercise are presented in the schedule below [1].

INDEXES OF GROWTH IN VALUE OF SALES BETWEEN 1960/61 AND 1965/66, AND OF PREDICTED GROWTH IN SALES BETWEEN 1965/66 AND 1970/71, CORRECTED FOR CONSUMER PRICE INCREASES, EXPRESSED IN RELATION TO A BASE OF 100 IN 1960/61 [2].

	1960/61		1965/66		1967/68		1970/71
C.B.D. - Conv. :	100		113		129		150
Difference p.a.		(2.6)		(8.0)		(7.0)	
C.B.D. - Dur. :	100		112		125		144
Difference p.a.		(2.4)		(6.5)		(6.3)	
C.B.D. - L/Var.:	100		120		137		164
Difference p.a.		(4.0)		(8.5)		(9.0)	
Old Borough - Conv. :	100		105		122		140
Difference p.a.		(1.0)		(8.5)		(6.0)	
Old Borough - Dur. :	100		185		244		280
Difference p.a.		(17.0)		(29.5)		(12.0)	
Rest Mun. - Conv. :	100		86		106		130
Difference p.a.		(-2.8)		(10.0)		(8.0)	
Rest Mun. - Dur. :	100		100		119		149
Difference p.a.		(-)		(9.5)		(10.0)	
Rest Mun. - L/Var.:	100		179		200		277
Difference p.a.		(15.8)		(10.5)		(25.7)	

It will be noticed from these results that there is very little continuity or similarity between past growth and anticipated future growth. Generally speaking, the expected future growth is much higher than the actual growth between 1960/61 and 1965/66. These results leave the impression that businessmen in the retail trade in Durban are perhaps rather too optimistic, despite their apparent hard-headedness and realism in the interview situations.

The answer to this dilemma probably lies only partly in the optimism of our respondents, and partly in the fact (as the results in Tables XXXIII and XXXIV show) that from 1962/63 onwards, growth in the value of sales was sufficiently strong

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1] It is realised that the procedure adopted was rough and arbitrary. Nevertheless, bearing in mind that the data are subject to sampling error anyway, the procedure was considered adequate for the purposes of this analysis.

2] Firms not included in the 1960/61 Census figures were excluded from the analysis for all other years.

to justify the predictions represented above. The results of the predictions can therefore probably be taken as a rough indication of what future growth in sales would be if the market was to remain as favourable as it was between 1963 and 1965.

(3) Probable Future Additions to Ranges of Commodities and Services among Firms in Durban.

It is assumed that retailing and personal service firms continually strive to adjust to any fluctuations of demand in the market. From a planning point of view, this type of change in types of goods sold can be important, since very often additions to ranges of goods sold can have implications as regards the floorspace needs of firms which either already exist or might come to be established.

In Table XL in the Appendix, the percentage distribution of firms intending to add particular commodities to their selling range is presented.

Looking firstly at personal service establishments, it seems that in the Hard Core a substantial minority of firms intend to add the sale of novelty goods to their activities. The personal service firms in the Grey Street and Central (Old Borough) areas which intend selling clothing are all probably tailoring houses.

In other respects the results in this table are largely self-explanatory and need no very detailed comment.

Broadly speaking, it would seem that large variety firms in the Hard Core intend adding a wide range of commodities to their existing stocks, with household electrical goods featuring prominently in this respect as well. The intention to add household electrical goods is also characteristic of large durable outlets in the Hard Core. The tendency among convenience stores seems largely to be to merely add additional ranges of foodstuffs.

The firms in the Grey Street area appear to intend adding a wider range of commodities to existing stocks than is the case elsewhere in the Central Business District. Here, clothing and foodstuffs feature prominently.

In the Rest of the Central Business District, the only outstanding trend seems to be the intention to expand the ranges of foodstuffs and travel, recreation and novelty items.

In the Old Borough area, convenience, and to a lesser extent, durables firms, seem to intend adding as wide a range of goods as is the case in the Grey Street area.

There would appear to be a tendency among durables firms in the outlying Municipal suburbs to intend adding types of commodities usually associated with firms in the Central Business District. Here we refer to goods such as motor cars, furniture, household goods, and clothing. This is true to a much lesser extent in the areas outside the Municipal boundary. It would appear as if the decentralisation of sales of the Central Business District type of durables goods will be largely limited to the Municipal area in the near future. This conclusion applies only to the ranges of goods carried by durables stores however, since a substantial proportion of large variety firms in the peri-urban areas do appear to anticipate adding furniture to their range of goods.

An interesting tendency in the outlying local authority areas is the tendency among roughly one-third of the convenience stores to add various types of small durables goods to their selling ranges. We can apparently expect considerable diversification of activities among convenience outlets in the fringe areas of the city.

From a perusal of results not obtained in a form suitable for tabulation, it would appear that in general, two-thirds of firms intending to add new commodities intended to do so within twelve months. The remaining one-third of firms have intentions to add goods in between one and ten years time in roughly equal proportions. There would not appear to be any really significant differences between types of firms in different areas, except that among large variety stores in the Hard Core, retail firms in the Grey Street area, convenience firms in the Old Borough area, and personal services and durables firms in the Municipal suburbs, the intention seems to be to add commodities one to two years later than other firms generally.

The present study also provides us with results with regard to any intentions among firms in Durban to add additional services or customer facilities. These results will not be discussed but are presented in Table XLI in the Appendix.

The results as tabulated are quite self-explanatory.

It is of interest to consider the reasons respondents gave for intending to add goods or services. These reasons were expected to give us some idea of what current forces are operating in the market which firms are likely to take advantage of. The results which are presented in Table XLII are somewhat disappointing however. The respondents seemed to find it difficult to conceptualise their reasons for doing things. [In this regard the impression was gained that intuition, or "a good nose for business" played a greater part in guiding the decisions of particularly small businessmen than objective logical reasoning.] The categories into which answers could be coded are not very precise; in fact their vagueness is a reflection of the type of answers obtained.

It will be noted from the results that very few firms intended adding goods or services to attract particular customers. It was hoped that some indication would be obtained of whether or not firms were trying deliberately to cater for particular ethnic groups, for example. Our results in this respect seem to indicate that firms generally are not orienated in this way.

Firms do seem to be very sensitive to the demand for particular goods, and this is the most frequent reason for adding goods. Admittedly, this is less frequent a motivation among White firms and Indian durables in the Central Business District, with the possible exclusion of small durables outlets. These firms, in keeping with their greater degree of business sophistication, seemed more concerned with using new products and services to attract attention, shape their company images, and for purposes of advertisement. In other areas, this type of reason, together with the rather closely related one of offering a "service for customers" only featured prominently among personal service firms outside the Central Business District. Among these firms this type of reason is certainly more directly connected with day to day activities than it would be among retail firms.

One other frequent motivation in all areas is what almost appears to be a hope that by adding to the range of goods or services, turnover will be increased.

Although these results are not of compelling interest, they do tend to indicate that firms, and particularly those firms outside the Central Business District, are not likely to anticipate demand long in advance of it actually manifesting itself. Apart from the tendency to be concerned with the firms image, retailing management in Durban would seem to be rather "hand to mouth" in character.

(4) The Relative Demand for Various Types of Commodities in Durban at Present.

Instead of relying on the predictions and opinions of retailers, perhaps a more concrete indication of likely future trends in the sale of commodities is to be obtained from an analysis of what types of goods are selling most successfully at the moment.

In Table XLIII we present the results of the shopkeeper's own general assessments of the types of goods selling most successfully. Naturally, the analysis is limited to these firms which do carry a range of types of goods. In order to provide these results, respondents were asked to name those types of goods which were selling fastest and second fastest The two[1] replies have been combined in the table, hence all results are to a base of 200% of firms in each category.

The overall picture obtained from Table XLIII is that there is relatively more demand for foodstuffs than for any other types of goods. Sweets, tobacco products, and clothing can be ranked next after food, but with far lower proportions of firms mentioning these products.

With regard to the detailed categories in the table, we will attempt merely to highlight a few of the major trends. In the Hard Core, toiletries and soaps, furniture and appliances, and to a lesser extent clothing as well, seem to be more successful than other articles. In the Grey Street area, foodstuffs, sweets and tobacco and clothing are significantly prominent. In the White Frame area, once again the sales of foodstuffs, as well as toiletries and soaps, vehicles, and personal goods (gifts, curio's,

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1] Two answers were elicited from firms selling three or more types of goods. One answer was required where only two commodities were sold.

jewellery, etc.) seem to be most successful.

In the Old Borough area, the goods selling fastest seem to be food, sweets and tobacco goods, and clothing. In the Rest of the Municipal area, food, clothing and fuel (petrol and oil) and toiletries seem to be most successful, while outside the Municipal area, food, clothing, and furniture and appliances are most in demand.

It is of some interest to note that in large variety stores, where a very varied range of goods is sold, the pattern outside the Municipal area differs from the pattern in the Municipal area, in that clothing seems to be selling more successfully in the outlying areas. (The one large Indian variety store in the Central area is excluded from this comparison, since it is situated on a virtual ribbon of stores which concentrate to a large extent on clothing sales.)

The only really major trends in these results which could be of significance to town planners would appear to be the fact that furniture, appliances and clothing (in large variety stores) appear to be in considerable demand in the outlying local authorities. This does seem to represent a swing of demand away from the Central Business District.

(5) Future Trends in the Geographical Location of Retail Outlets and Personal Services.

Another indication of changing patterns of demand, and one which is of most direct relevance for town planners, is the intentions of businessmen to change the location of their establishments in the future. These trends can obviously be translated into space requirements in different areas more directly than most of the other indexes of geographic shifts in activity used up to now. Results of our enquiry into the likelihood of such geographical shifts taking place are presented in Tables XLIV, XLV, and XLVI.

In Table XLIV, the results have been tabulated separately for small and large firms. In dividing the firms into the categories of large and small, the Median floorspace for all firms in the project area was generally used as a guide, but the amount of the current turnover was also taken into account in deciding how to classify the firm.

In the Central Business District, only firms in the Hard Core and Winder Street North areas intend to move their premises. In the Hard Core no significant differences accordnng to size of establishment exist, but in the Winder Street North area, only the larger firms appear to intend moving.

In the lower socio-economic areas of the Old Borough area (excluding the Warwick Avenue/Berea/Umbilo Road complex) just under one-third of firms intend moving and more particularly the smaller establishments.

In the upper socio-economic areas of the Old Borough and of the Northern Municipal suburbs, as well as in the Southern Municipal areas, roughly between one-fifth and one-third of the smaller firms can be anticipated to change their location.

In the outlying areas of Amanzimtoti, and Westville it is once again the smaller firms which intend moving, except in Pinetown, where relatively more larger firms than smaller firms intend moving. The overall proportions of firms in Pinetown which intend moving is rather low however, being roughly only ten per cent.

Generally speaking, it seems that it is the smaller type of establishment which can be anticipated to move in the areas outside the Central Business District, whereas in the Central Business District, it would appear to be rather the larger firms which are to move. It is surprising that only in the Pinetown area is there any substantial proportion of firms which will have to move because of group areas provisions.

The results in Table XLVI suggest that in the Hard Core it is among the personal service, durables and large variety establishments that firms can be anticipated to change location. Only a very small percentage of personal service establishments in the Grey Street area will be moving, while in the Rest of the Central Business District, it is only among durables firms that moves can be anticipated. Throughout the Central Business District, convenience outlets can be expected to remain where they are.

No real differences emerge between various types of outlets in the Old Borough area, while in the outer Municipal suburbs, relatively more convenience firms can be expected to move. In the areas outside the Municipal area, more personal service firms, followed by durables outlets, are likely to move than is the case with convenience firms.

Reference to Table XLV will show that no firms presently situated in the Hard Core can be expected to move away from this area or this type of area. In the Rest of the Central Business District, it is only in the case of a few large durables outlets where the firms can be expected to move to areas known for sales of specific types of goods (in this case it is probably motor firms wishing to move nearer to the hub of the motor town district; which really does not entail a major geographical shift).

In the Warwick/Berea/Umbilo area, a small proportion of firms can be expected to move to less centralised areas ("other areas" in Table XLIV) and an even smaller proportion of firms might move into the Hard Core. Of the firms in the lower socio-economic areas of the Old Borough that are to move, the larger firms can be expected to move into the Central Business District, while the smaller firms will either move into the suburbs or move to more favourable sites in the same area. The small firms in the other Old Borough areas which are to move can all be expected to move to more concentrated shopping areas or planned centres, or nearer to concentrations of customers in the same area. In fact in all the other municipal and suburban areas, those firms which are to move can be expected to move to more favourable sites in the same type of area, or to growing concentrations of shops, rather than to areas necessarily nearer the centre of town. Only in the Pinetown and Amanzimtoti areas are there small numbers of firms of the smaller variety which can be expected to move into the Hard Core of Durban.

VII. FACTORS RELATING TO THE PRESENT GEOGRAPHICAL LOCATION OF RETAIL OUTLETS AND PERSONAL SERVICES IN DURBAN.

The provision or zoning of certain areas in a city for commercial use should ideally be based partly on a consideration of those factors which are likely to affect the circumstances of commercial establishments erected or maintained in the particular area. Naturally, other factors are also of extreme importance to the town planner, who cannot always consider only the welfare of businessmen.

Nevertheless, where possible, the interests of traders should be taken into account and it was partly because of the need to shed light on the factors influencing the interests of businessmen in Durban that the data presented in the following section were collected. Another goal in collecting these data is bound up with the fact that a knowledge of the factors influencing business interests will often allow rough predictions to be made of where retail trade is most likely to expand and flourish, or where this activity will decline or be replaced by other types of urban use.

(1) Factors Relating to the Choice of Existing Sites and Areas.

In seeking information on this topic in the present study, a distinction was made in the questioning of respondents between reasons for choosing their present site and reasons for choosing their present area. In studying the answers, however, it appeared that both questions produced very much the same answers. It seemed also to be a fact that there was very seldom an open choice of sites available, with the result that the choice of site was often forced upon the businessmen. We have therefore concentrated almost exclusively on the reasons for choosing to establish a business in the particular area in which respondents are located. Later on in this section a broad assessment based on untabulated results will be given of the relevance of major factors associated with the site rather than the area.

In Table XLVII the main reasons respondents gave for establishing their firms in particular areas are tabulated according to refined geographic divisions and according to whether or not the firms have ever been moved from one address to another. It was assumed that in relocating their premises, firms would give more careful consideration to the factors operating in particular areas, and that these results should be considered separately in order to gain most insight from them.

Generally speaking though, there do not seem to be very many significant differences between the answers obtained from the firms which have and have not moved. It would seem that the presence of "passing trade" has been somewhat less important as a consideration for the firms which have moved, and that accessibility to roads, buses, or being centrally located in relation to other amenities, has been a little more important.

In the Hard Core, more of the firms which have not moved have taken over some existing business, and these firms would also appear to have been more concerned with being near concentrations of shops and offices. The firms, which have moved would appear to have been more concerned with being near to residential populations and transport and parking amenities. Generally speaking, the more important reasons for location in the Hard Core seem to have been the presence of passing trade, accessibility to transport and other amenities, and the purchasing of an established business in the area.

The same sort of major motivations appear to have existed in the Grey Street area, with the exception that proximity to other branches of the same firm, nearness to respondents home, and a host of very individual reasons ("other") also appear to have been important.

As in the rest of the table, (excluding the Hard Core), very few of the differences between firms that have or have not moved are significant, due to the small numbers of sampled firms which have moved.

As for the other areas of the Central Business District, the main reasons for location could almost have been predicted from a knowledge of the area being studied. We find that on the beachfront the presence of a residential population has been important, as has been the presence of tourists, and of course the presence of passing trade and proximity to other branches or the shopkeepers home. In the Albert Park area, once again the residential population, the central location, parking and presence of customers of a particular type (flat dwellers), emerge as important reasons for location.

In the Winder Street North and South areas, the same major reasons for location emerge, except that here the additional fact that the area is often recognised as a centre for a particular type of goods has also been considered important.

It is pointless to attempt to analyse the pattern of answers for the areas Outside the Central Business District in any detail, since the variations between areas do not in most cases, follow any particularly logical or expected pattern. Suffice to say that the presence of passing trade seems to have been less important a reason for location outside the Central Business District than it has been in the Central Business District. This applies to accessibility to transport and other amenities as well. Reasons which appear to have been more important Outside the Central Business District than they are among firms in the Central Business District are: taking over an established business, and proximity of the firm to the shopkeepers home or to the main branch of the business.

In Table XLVIII, we obtain some idea of differences in reasons for location between types of outlets. Although there are many differences between types of outlets in particular areas which are significant it is once again difficult to discern any overall trend which "makes sense". It does seem as if there are certain major reasons for location which are important to all types of firms in all areas, with a few exceptions. The major reasons for locations we have dealt with already. Here we should briefly consider these types of firms where a significantly different pattern of reasons exist.

Personal services firms in the Hard Core stress the importance of a working population nearby and do not seem to have considered passing trade, which is naturally an expected pattern of reasons for these firms. Large variety outlets in the Hard Core have obviously been located with the sole aim of placing the store where as many people as possible will find it convenient to pass through the store.

Personal service firms in the Rest of the Central Business District tend to be located there to take advantage of large residential populations, because of proximity to amenities, and for a host of very individual reasons. Convenience firms in this area also stress the importance of residential populations nearby. As would be expected, large durables outlets (motor dealers) are very often located in motor town because it is a recognised centre for particular products. The large variety firms in this area appear to be located where they are mainly because of the concentration of flats nearby.

As we have noted before, firms outside the Central Business District more often tend to be located where they are because the area is near to the owners home or near to a main branch of the firm.

Durables outlets in the Old Borough area seem to be attracted quite often by the presence of other shopping facilities.

Large variety stores in the Rest of the Municipal area tend to be somewhat unique in that the presence of parking facilities is an important reason for location. Large variety stores outside the Municipal area are understandably, not located where they are so much because of the presence of parking facilities or other amenities, but because of residential population concentrations of a particular type.

Generally speaking, in analysing these results, we have been surprised at the fact that so many reasons for location which we expected to be important, turned out to be relatively unimportant. Among these reasons we could list: parking facilities, attractions of customers of particular ethnic groups, accessibility for deliveries, and proximity to customers of a particular type. What we find even more surprising is the fact that so many firms are located where they are simply because an existing business has been available for sale. In these cases the purchasers would appear not to have given factors which are important to the location of the firm very serious consideration.

In regard to the choice of the site, we have not tabulated any results, for, as stated previously, the answers very nearly duplicated those results we have just been dealing with. In addition to this, by far the most common answer regarding the site was that the site chosen was the only one available in the area. It would seem as if the choice of site is very often purely a matter of availability. However, we will mention briefly the other reasons for location particularly applicable to the site which can be helpful in addition to the results regarding the area of location.

In the Hard Core area, it seems important in choosing a site that it should be centrally placed in a shopping zone. This seems to be most important for Personal Service establishments and large variety stores. For personal services and large durables outlets, it seems important that the site and premises be as large as possible. To have a business centrally situated in a shopping zone also seemed very important in the Grey Street area.

In the Frame area, sites with lowest rentals would seem to have been an important consideration in the choice of the site, particularly among small durables outlets; and the suitability and safety of the premises appear to be fairly important considerations among large durables outlets.

Outside the Central Business District, the factor of rental seems to be very important in the choice of a site, although firms outside the Municipal boundary are an exception. The rental factor seems to be most crucial among personal service firms in the Old Borough area, and among both personal service and retail firms in the rest of the Municipal area. Among large variety stores outside the Central Business District, a major motivation seemed to be to find premises large enough to accommodate the substantial buildings that these outlets require.

(2) Degree of Satisfaction with Present Location among Firms in Durban.

Broadly speaking, the previous analysis has not provided us with as much specific information on the effects of geographical location on the operation of businesses as we had hoped. A more direct approach to this question is to consider the advantages and disadvantages of present location, as perceived by the businessmen themselves. In Table XLIX, we present a distribution of the advantages of present location by geographical location, and size of firm[1]. The variable size of firm, was added to this analysis because it seemed reasonable to assume that the characteristics of an area might affect firms of different size in different ways. Since the interests of town planners are directed towards the type of firms which might change location at some future date, it was considered essential to examine the degree of satisfaction or dissatisfaction with present location according to the major variable of size.

In the Hard Core it would seem that large firms consider themselves to be more easily accessible, and to have fewer difficulties in regard to parking, but suffer somewhat from a relative lack of passing trade and also from not being located near enough to the working population. The smaller firms have the additional advantage of lower overheads and rentals but seem to suffer more than large firms from a lack of suitable premises.

In the Grey Street area the larger firms do not consider themselves as centrally situated or as accessible as the smaller firms, but do have suitable premises and benefit from a great deal of passing trade. In the Frame area of the Central Business District, a mixed pattern of answers emerges. Generally, the firms which are large appear to benefit less from passing trade than the smaller firms. In the Albert Park and Winder Street South areas parking facilities are considered a real advantage. In the Winder Street North area the larger firms consider themselves very central and accessible and also benefit from lower rentals and overheads. In the Winder Street South area, the smaller firms see the support they get from Non-White customers to be of considerable importance.

The large firms in the Warwick Avenue/Berea/Umbilo Road complex, compared with the small firms, have the disadvantage of inaccessibility and not being centrally situated, but mention the advantages of having suitable premises, being near to major roadways and the market, and surprisingly enough, of passing trade, as well as of parking facilities.

1] The criteria adopted in dividing firms by size has already been discussed.

In the Municipal area outside the Warwick/Berea/Umbilo complex and Central Business District, the larger firms benefit more from the advantages of accessibility, and lower rentals and overheads as well as from having suitable premises and parking facilities. The smaller firms benefit more than the larger firms from passing trade, and lack of much competition.

On the perimeter of the city as well, the larger firms would appear to gain more from having suitable premises, and parking facilities nearby, and also, surprisingly enough, from passing trade. The smaller firms derive more benefit from accessibility, lower costs, being near a residential population and the regular customers that this implies, from Non-White customers, and from being near to places which attract people.

So far, we have merely considered the differences in appeal which various locations have for small firms as opposed to larger firms. In regard to the differences between areas, it would seem that firms in the Hard Core find their central situation and the passing trade to be the greatest advantage. In the Grey Street area, the same major advantages hold with accessibility being an added factor. In the Beachfront area, passing trade, and suitable premises are important, and in the dock area, support by Non-Whites and passing trade are regarded as the major advantages. In Albert Park, suitable premises, central situation, and lower costs are the major advantages. Accessibility and suitable premises are the major satisfactions experienced by those in charge of firms in the Winder Street North area. In the Warwick/Berea/Umbilo complex, accessibility and passing trade seem to be the major virtues of the location.

In the more centrally situated areas we can detect that the major advantages perceived are generally similar to one another. When we study the results for the Rest of the Municipal area, we find the emphasis switching somewhat. Here the major advantages are: the proximity to regular customers and residential populations, and the ease with which deliveries can be made by wholesalers and the Railways, as well as passing trade and suitable premises, although the latter two are relatively less important than the previous ones mentioned.

In the outlying Local Authorities, major advantages seem to be perceived as being passing trade and suitable premises, as well as parking facilities and a location which is central to the region served.

From these results we do gain some idea of what businessmen regard as being important factors in regard to the location of their businesses. Conversely, by noting the advantages where low frequencies appear in the results, we can also obtain an impression of the disadvantages of areas. However, a more adequate assessment of the negative features of different areas from the point of view of businessmen is obtained from the results in Table L in the Appendix, where the respondents' criticisms of their locations are tabulated in broad categories[1].

These results show quite clearly that relatively more businessmen in the Hard Core have complaints about their areas than those anywhere else. The major problems in the Hard Core are: restricted size of premises, lack of parking and loading facilities, and high rentals and overhead expenses.

The same major problems appear to exist in the Grey Street area with the addition of fierce competition as a negative feature of the area. It should be stressed though that these problems in the Grey Street area all have a lower percentage response than is the case in the Hard Core. Businessmen in this area have relatively few criticisms of their area. It might be that Indian respondents in the Grey Street area were guarded in voicing criticisms for fear that these would be used as justification for policies in terms of the Group Areas Act.

Similar major disadvantages exist in the Frame area of the Central Business District: restricted premises, and lack of parking and loading facilities. Roughly the same distribution of complaints is present in the Old Borough area, added to which a high proportion of Non-White businessmen mention their uncertainty as a result of Group Areas provisions.

1] In studying the detailed tabulations of dissatisfactions with present location, it became apparent that in order to produce meaningful results, the areas included in the analysis had to be consolidated.

In the Rest of the Municipal Area, a variety of complaints about the locality (heavy traffic, noise, remoteness, unsuitable or anti-social surroungings, etc.) seem to indicate the existence of major problems in the location of suburban shopping areas, particularly for Indian shopkeepers. Otherwise, the major complaints are once again that premises are too small, and that the future of the business is endangered by Group Areas provisions.

Outside the Municipal area, the major difficulties are that the sizes of premises are too restricted and that adequate parking and loading facilities are not provided.

Generally speaking, it would seem that in some cases the disadvantages mentioned most often by businessmen are the absence of those features of areas which other businessmen, and particularly the larger firms, mention as being major advantages. This means, in fact, that the real importance of some of the major advantages mentioned is reinforced by the fact that the absence of these feature are regarded as major disadvantages. It would seem that the advantage of size and suitability of premises, for example, is re-emphasised by the results just discussed. This pattern of results does of course tend to confuse our impressions of the particular areas where these "contradictory" results occur. What these results mean in this sense is, of course, that the areas contain a mixture of good and bad features.

A surprising feature of these results is that the pattern of responses does not appear to differ much from area to area.

In Tables LI and LII, results are presented which enable comparisons to be made between the advantages and disadvantages of present location as perceived by White and Non-White businessmen separately. Generally speaking, slightly more Indian businessmen than Whites would appear to regard themselves as being centrally situated, and near a residential population. (The Grey Street and Clairwood areas would combine both these advantages.) Indian businessmen also benefit by relative ease of deliveries from wholesalers and the railways. However, a larger proportion of Whites seem to benefit from relatively low overhead costs, parking facilities, and from suitable premises and buildings.

In regard to the disadvantages expressed, it would seem that more White businessmen than Indians find their premises too small, and suffer from lack of parking and loading facilities. Indian Businessmen, on the other hand, suffer relatively more from the insecurity produced by Group Areas legislation, and also complain more about the poor quality of the areas in which they run their businesses.

(3) Advantages and Disadvantages of Suburban Location of Firms.

One of the major processes currently taking place in cities is the tendency for commercial undertakings to become decentralised by being relocated (or located in the case of new firms) in the suburbs. The impression is gained that this process has not as yet gained full momentum in Durban. The question naturally arises as to when the process will be accelerated. This is a question which can be of vital importance to town planners and we have accordingly made an attempt to shed some light on the matter. The assumption was made in the planning of the study, that the opinions of our businessmen regarding the relative advantages and disadvantages of being located in the suburbs would provide some idea of the current motivations or needs to decentralise commercial undertakings[1]. The results of these questions are presented in Tables LIII to LVI in the Appendix. It is not profitable from our point of view to comment on these tables in too much detail. As in many of the previous tables there are myriad small and large differences between the answers in individual categories of firms and the picture which emerges if all these differences are taken into account is often confusing. In any case, the important aspect to be considered here is the percentages of businessmen in various categories who perceive or express real advantages or disadvantages in being located in the suburbs.

In general, the responses obtained from all firms taken together give the following picture of advantages in the

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1] It will be noticed that the interview schedule contains not only questions on the suburbs, but on other more central areas of town as well. However, we have found that the replies to all other questions were not satisfactory, since businessmen could apparently not visualise conditions in the other areas of town. Only the items on suburban conditions have therefore been tabulated.

suburbs. Some one out of every three businessmen see no particular advantages in having a business located in the suburbs. The greatest advantage perceived is that of having regular customers, followed by the absence of parking problems, lower rentals and running costs, and the closeness to concentrations of residential population.

The proportions of businessmen who see no particular advantages in being located in the suburbs is highest in the Central Business District. In the Hard Core, some 50% of firms claim that no advantages exist in the suburbs. The proportions are even higher in the Grey Street, Docks, and Warwick/Berea/Umbilo areas. It is also interesting to note that the proportion is highest among durables outlets and lowest among convenience and large variety outlets in the Central Business District. The dependence of the large variety outlets on suburban markets is clearly reflected in these results. Among large durables outlets the only really major advantage perceived in suburban location is the abundance of parking facilities. Even in the suburban areas themselves, the durables firms are those which most often mention that no substantial advantages exist in the suburbs, but here the proportions among all types of outlets are very small.

A significantly lower proportion of respondents claim that no disadvantages exist in the suburbs. Obviously, the suburbs are generally seen in a more unfavourable than favourable light by businessmen in Durban.

The major disadvantages perceived are firstly, the relative absence of passing trade, (± 25%) followed by a cluster of disadvantages having almost equal weight: the fact that customers prefer the centre of town and have more confidence in the goods sold centrally, that suburban firms can only serve limited areas, insufficient demand, and the fact that the suburbs are generally not suited to particular types of firms (mainly durables outlets).

As one would expect, fewer firms in the Central Business District and other centrally located areas see no disadvantages in the suburbs than is the case with suburban firms. The proportion is lowest in the Hard Core, Grey Street, Albert Park, and Warwick/Berea/Umbilo areas. As regards type of outlet, the pattern is broadly the same as that mentioned in regard to the tabulation of advantages. The convenience and large variety outlets are least unfavourably disposed towards suburban location and the durables and personal services firms are most unfavourably disposed. This pattern does not appear to hold in the outlying Municipal suburbs however, where no significant differences exist between durables outlets and convenience firms. This is mainly due, however, to the presence of fierce competition for convenience firms in these areas from supermarkets and planned shopping centres.

Generally speaking, the pattern of results seem to indicate that any decentralisation will be slow initially because of resistances to the suburbs among firms in the centre of town. That which does take place will probably occur among convenience and large variety stores first of all. In the case of the latter, the advantages in the suburbs have already drawn numerous branches of large department stores to the outlying suburbs.

It is interesting to note that considerable differences in regard to attitudes towards the suburbs exist between White and Indian businessmen. Among the latter the advantage of having regular customers is very much more important than among Whites. The major advantages perceived by Whites (lower rentals and abundant parking) count less among Indians, and one assumes, mainly because they do pay relatively low rentals, and their customers do not use motor cars as much as White customers do.

Whereas roughly the same proportions of Indian and White businessmen see no particular advantages in the suburbs, more White see no disadvantages in the suburbs than do Indians. One must therefore assume that Indian businessmen generally favour the suburbs less than do the Whites. The major disadvantage in the suburbs as far as Indian businessmen are concerned is the relative absence of passing trade. They also regard the disadvantages of fierce competition from supermarkets, and that of being able to serve only one area, more seriously than do the Whites.

These differences do point to the essential difference, between typical Indian and White businesses. One can expect that White businessmen would be generally more able and willing to decentralise than Indian businessmen, especially if one considers that one of the major attractions for Indian firms in the suburbs, i.e. regular (credit?) customers, is not as yet a characteristic of the Indian buying public.

VIII. MAJOR ASPECTS OF THE DEVELOPMENT OF PLANNED SHOPPING CENTRES, AND A DISCUSSION OF CERTAIN SELECTED CHARACTERISTICS OF FIRMS IN PLANNED CENTRES.

An outstanding feature of developments in modern retailing has been the growth of the planned shopping centres, most of them situated in non-central areas of cities. These are specially designed shopping nuclei which emulate the variety and concentration of down-town shopping areas.

In recent times, Durban has seen the growth of a fair number of planned centres in such widely dispersed areas of the city as the Beachfront, the Grey Street area, the Old Borough or central suburban areas, the outlying Municipal suburbs, and in the outlying local authority areas. This process has virtually only just commenced, and it is of vital importance for town planners to be able to assess the likelihoods of extensive further developments in this regard. To this end, the sample was so designed as to include one in every three planned centre establishments, and specific questions were included in the schedule in order to obtain information on the present and future development of planned centres. In addition, the interviewing in planned centres was mainly entrusted to two research assistants who had been especially briefed to make them sensitive to the influences operating in planned centres.

In the analysis of the planned centres we will commence by dealing with the more systematic tabulated material and draw on the reports of the two investigators in our concluding remarks.

Before discussing the results, we should briefly pause to identify the different planned centres which will be referred to below:

"Mutual Beach" : Located in the Central Business District Frame, close to beachfront in the midst of extensive permanent residential middle class flat development. Estimated 31 firms. Nearest to Central Business District Hard Core.

Davenport (Mutual Square) : Located in a middle to lower middle class single dwelling unit suburban area with some flats. Estimated 14 firms. Second closest to Central Business District Hard Core.

<u>Glenwood</u> : Located in middle class single dwelling unit residential area with some flats. Estimated 14 firms. Only marginally further away from Central Business District Hard Core.

<u>Musgrave</u> : Oldest planned centre, located in a middle class single dwelling unit residential area with some flats and private hotels. Same distance away from Central Business District Hard Core as Glenwood Centre. Estimated 17 firms.

<u>Durban North</u> : Planned Centre surrounded by a concentration of older more established firms in a upper middle class single dwelling unit suburb, roughly seven miles from Central Business District Hard Core. Estimated 14 firms.

<u>Umhlanga Rocks</u> : Located in the centre of an outlying beach resort town with upper middle class single dwelling unit residences. Many hotels catering for tourists. Approximately 18 miles from Central Business District Hard Core. Estimated 20 firms.

(1) <u>The Development of Existing Planned Shopping Centres.</u>

In Table LIX we present a distribution of reasons which respondents in planned centres gave for establishing their premises in a planned centre. Generally speaking it would seem that the major reason was an assessment that planned centres were becoming fashionable and would prosper. The second most important reason related not to the planned centre as such, but to the area in which the planned centre is located. Following this is the consideration that planned centres draw crowds which ensure a healthy "passing trade", and the fact that competition is minimised by the fact that only one shop of a type is allowed in the planned centre. Similarly important was the fact that the planned centre offered a suitable premises for the particular firm.

In particular, the Mutual Beach, Davenport, and Musgrave Centres were regarded as being located in favourable areas. Davenport and Glenwood Centres appeared to offer suitable premises at attractive rentals, and Musgrave and Durban North were more often regarded as being conveniently located for staff. Glenwood and Durban North were more often chosen because of parking facilities and other conveniences for customers than other centres.

In Table LX we present the distribution of reasons for choosing a particular planned centre. Over 50 per cent of firms would appear not to have selected a particular planned centre on the basis of its own specific attractions. A major reason for selecting a particular planned centre appears to have been that suitable premises were available. Of the reasons relevant to individual planned centres, the major one was that the area was considered favourable. The presence of flats in the area was particularly important in the case of the Mutual Beach. The area was considered generally favourable in the case of once again Mutual Beach, Davenport, Musgrave, and Glenwood Centres. Another major reason, particularly relevant to Mutual Beach, Davenport, Musgrave, and Umhlanga Rocks, was that the area was convenient for staff and owners.

It would seem therefore, that planned shopping centres in general held specific attractions for the present tenants, but that in the choice of particular shopping centres, it was more often than not factors other than the characteristics of the particular centre which led to the establishment of firms.

The results in Table LXI shed a little additional light on the process of establishment of planned centres. It seems that the main reasons that businessmen have for locating their firms differ somewhat according to whether the firm is located, in a planned centre or not. Those locating their establishments in planned centres lay more emphasis on the need for passing trade, proximity to a residential population, or a large customer catchment area, the presence of other shopping attractions, and parking facilities. We can therefore perhaps assume that planned centres do provide the advantages which are presupposed by the businessmen in giving the reasons we have mentioned.

Table LXI also serves to establish a rather interesting fact, this being that 85 per cent of firms in planned centres are established there "ab-initio". Planned Centres obviously tend to draw new firms, or new branches, rather than existing firms that move.

(2) Present Characteristics of Planned Shopping Centres.

In Table LXI, a schedule of selected characteristics of planned centre firms is presented. Due to the fact that so few of the firms had been in existence for more than a few months, the information presented at the foot of the table on Mean value of sales is based on only 40% of the sample, and hence could not be specified separately for each planned centre.

It will be noted that the Mean total floorspace for firms in the planned centres is roughly the same as the Mean figure for all firms outside the Central Business District, i.e. 2009 sq. ft. in planned centres as opposed to 2162. (See Table IV in the Appendix.) Deviations from this Mean are quite large in individual centres, however. The Durban North and Mutual Beach centres are dominated by a few very large stores, which influence the Means for these centres very radically. It would be true to say that the "typical" firm in a planned centre is closer to the Means of the other centres, i.e. roughly 1100 to 1300 sq. ft. This does indicate that the size of typical planned centre establishments is roughly similar to the median size of convenience and small durables stores in the Central Business District Hard Core, and convenience establishments outside the Municipal area. It does seem that the firms in planned centres are generally larger than similar firms in the Durban Municipal Suburban areas, the Old Borough area, and in the Central Business District Frame.

It appears from the results in Table LXI, that firms in planned centres make more intensive use of their floorspace for sales or service purposes than other firms outside the Central Business District. The relevant percentages of sales area to total floorspace are 52% for all firms outside the Central Business District (see page 17) compared with 68% in the planned centres; a figure which is roughly identical to those obtained for the Hard Core and Grey Street areas (p. 17).

Results bearing upon the proportion of customers of different races in Table LXI, suggest that the planned centres have a far more exclusively White clientele than firms outside planned centres. Virtually 85% of firms in the planned centres can be classed as having an exclusively or near-exclusively White clientele, compared with for example, 38%

in the Hard Core, 46% at the Beachfront, 67% in Westville, or 49% in Umhlanga Rocks. Quite obviously, the planned centre establishments are of a type which draw White customers to the virtual exclusion of Non-Whites.

The Mean value of sales per square foot obtained on the basis of a 40% response rate on the turnover questions, albeit tentative, suggests that planned centre establishments have a lower return per unit of space than firms in the Hard Core, or even a lower return than convenience outlets in the Rest of the Municipal area. Broadly speaking, we can conclude that planned centre establishments have a turnover per square foot which is no higher than other firms in similar areas and lower than firms in the Central Business District. This might of course be a temporary phenomenon. Many of the planned centre establishments from which information was obtained had been established for barely one year.

Turning from quantitative data to opinion data, we refer the reader to Tables LXIII to LXVI in the Appendix. From these results we note that the major advantages presently existing in planned centres are, firstly, and by far most important, that customers are attracted by the variety and concentration of shopping, followed by the fact that planned parking facilities are provided, that the centres offer protection from weather and ease of movement for customers, and that they are located close to concentrations of population. A surprisingly high proportion of tenants (almost 80%) can think of no major disadvantages existing in planned centres. One of the disadvantages mentioned most often is in fact a temporary one, this being that in the early stages shortly after completion, the centres do not carry a full range of types of outlets, particularly true in the case of Glenwood Centre. Two other disadvantages, mentioned by very few tenants, are that people in Durban are not accustomed to decentralised shopping, and that the planned centres are remote from wholesalers and the head offices of firms.

A slightly less direct way of obtaining essentially the same type of information is that of tabulating the satisfactions and dissatisfactions with present site and premises separately for tenants in planned centres (Tables LXV and LXVI).

Roughly one-half (49%) of the tenants in planned centres have no dissatisfactions with their present sites and premises, compared with less than one-third (29%) among firms in general. On the other hand, not one of the tenants in planned centres can state that he has no particular satisfactions with his present site and premises, compared with some seven per cent of businessmen in Durban as a whole. There can be no doubt therefore, that tenants in planned centres find their sites and general locations more satisfying in the business sense than firms do generally.

The greatest single satisfaction in planned centres appears to be the fact that the premises are suitable. Other major satisfactions are the presence of planned parking facilities, or an abundance of parking generally, the proximity to residential populations and regular customers, the accessibility of firms and the passing trade. Parking facilities would appear to be regarded as generally less-satisfactory at the Davenport and Musgrave centres. The premises are felt to be particularly suitable at the Umhlanga Rocks Centre, and the location of the centre in relation to the population of customers is felt to be best at the Glenwood, Musgrave, and Mutual Beach centres. The advantage of passing trade seems to be most generally recognised in the Mutual Beach, Musgrave, and Durban North Centres, although it is probable that the volume of customers in the other centres has increased subsequent to the period of the fieldwork.

No major specific dissatisfactions appear to exist for planned centres generally. In the Musgrave Centre some of the premises seem to be regarded as being too small, and in regard to the Davenport Centre, it is sometimes felt that the surrounding residential population is a little too impecunious to make the centre, very profitable. This opinion is limited to more "expensive" type of firms, however. The other dissatisfactions are very individual in character and have little general significance.

In the present survey, we took the opportunity of benefiting from the current experiences of tenants in planned centres in an attempt to establish where planned centres are likely to be most profitable and successful. In Table LXVII we present a distribution of answers.

One opinion outweighed all others by far, this being that planned centres are likely to be most successful if located in the suburbs as far away from the central business areas as possible. As we will note further on in this section, many of the tenants in the centres closest to the city centre felt that their potential customers were so near the Central Business District that it involved little additional effort to travel the extra distance to town. Otherwise, dense multi-dwelling unit areas, lower socio-economic areas where people have few cars and run fewer accounts with firms in the Central Business District, and areas of high population concentration were mentioned.

By these standards, shopping centres in areas like Woodlands, Montclair, Bluff, Seaview/Hillary, and perhaps Chatsworth as well, are likely to become particularly prosperous.

(3) The Future of Planned Centres.

While the future of planned shopping centres is undoubtedly assured, the opinions of tenants in existing centres regarding the future of planned centres does give some idea of the rate at which development will proceed and of the acceptance which this type of development will receive in the community.

In Table LXVIII in the Appendix, we present the distribution of opinions expressed with regard to the future of centres. These results make it clear that literally none of the tenants in existing centres consider that the future of such undertakings is limited or poor. Roughly one-half of this group are prepared to pronounce the future to be excellent or good without qualification. Slightly more than one-third consider that the public still have to become accustomed to the idea of shopping in planned centres, but consider that once this stage is reached, the future of planned centres is assured. It should also be noted that tenants in all the planned centres we studied were of a common mind in regard to the future of their type of businesses.

A more indirect way of assessing the future of planned centres is to compare the estimates of future value of sales in planned centres with those for Durban as a whole. The relevant results for planned centres are presented in Table LXIX. Considering the fact that most of the planned centres have been only recently established, the comparison should be made on the basis of estimates for 1970/71, since the estimates for 1967/68 might reflect the initial instability of the firms.

It seems clear that businessmen in planned centres are more optimistic about their future growth than businessmen generally. The Mean of estimates for 1970/71 in all centres taken together is 166% of the current value of sales. This is considerably higher than any of the estimates obtained from all firms in different areas of Durban. The highest of these, it will be recalled, was 147% in the Municipal suburbs and 152% in the areas outside the Municipal area. Admittedly, we should bear in mind that previous results have shown that establishments in planned centres might have a relatively low return per square foot of floorspace at present, and that the tremendous increases in turnover which are envisaged might partly be a function of this.

Looking at the results for individual planned centres suggests that tenants in the Mutual Beach, Davenport, and Umhlanga Rocks Centres are most optimistic about the future, and that tenants in the Musgrave Centre are least optimistic. However, the lower Means obtained in the case of the Musgrave Centre might be due to this centre being the oldest and most well-established, with tenants who do not anticipate the rapid initial growth characteristic of other newer centres.

(4) Planned Centres in General - A Brief Discussion Based on the Results of a Small Unstructured Study.

As mentioned previously, two interviewers were especially briefed to make a somewhat broader study of planned centres than would have been allowed by merely using the standardised interview approach. These two interviewers were told to discuss the matter of planned centres with both shopkeepers and a selected range of customers in each centre, and to report on their findings. The significant results of this exercise are reported on below.

In many ways the results of the broader study serve to corroborate the findings reported on earlier. Generally speaking, tenants and customers were optimistic about planned centres, and believed that once these centres became an established part of retailing in Durban, the sales of tenants would increase rapidly. In addition to these general views, many of the respondents showed that they were aware of finer and more detailed issues regarding the design and location of planned centres.

It was continually emphasised, for example, that planned centres should be "one-stop" shopping centres. In other words, there should exist in each centre a sufficient variety of outlets to be able to satisfy the everyday needs of most customers. The absence of sufficient variety was mentioned in the criticisms of some of the centres. Glenwood Centre, for example, at the time of the survey lacked such important types of firms as a florist, a stationery and bookstore, a hardware store, a haberdashery, a dry cleaning establishment, a barber, and a post office.

The Davenport Centre had a wider range of attractions at the time of the survey. All it lacked was a barber and a post office. The Durban North Centre lacked a post office, chemist, bookshop, and a hardware store. However, the Durban North Centre is situated in close proximity to Durban North's most important shopping area (and to a cinema), which might serve to correct the unbalance in the range of shops in the centre.

The Mutual Beach Centre lacks a post office, but had greater overall variety than any of the other centres at the time of the survey.

Another major factor mentioned by respondents was that every shopping centre should have the major attraction of a very popular department store or supermarket. In this respect, the Mutual Beach, and the Davenport Centres have a decided advantage over the others. The tenants in Davenport Centre are perhaps even more fortunate than those in the Mutual Beach Centre since customers have to walk through the centre to shop in the popular supermarket. This ensures a good passing trade for the other shops. Centres with marked disadvantages in this respect are the Glenwood and Musgrave Centres.

Another important advantage in a planned centre is the presence of a bank, and also doctors and dentists consulting rooms. The only centre which has the latter attraction is Mutual Beach, something which is made possible by the extensive flat and office development above the first and second floor shopping.

Many of the shopkeepers complain about high rentals in the planned centres, particularly those in the Glenwood Centre.

It seems possible, judging from the comments of respondents of all types in the centres, that the absence of competition from other shops of a similar type causes the service to be less efficient in planned centre shops than it is in the Central Business District.

Many of the tenants in the planned centres had very definite ideas about where planned centres should be located. It would seem that middle to lower-middle class areas of highest possible population density, and which are either far away from the Central Business District or where transport facilities to the Central Business District are inadequate, represent the ideal locations for planned centres. A further point made was that the areas should preferably be new or undergoing rapid development, since people in stable long-established suburbs develop fixed patterns of shopping which are difficult to change.

In conclusion we might add that the tenants in planned centres do appear to represent a somewhat more sophisticated type of businessmen than one would encounter in the suburban areas of Durban generally.

IX. BROAD SUMMARY AND GENERAL CONCLUSIONS.

This study of retail trade and personal services in metropolitan Durban proved to be a difficult undertaking. Businessmen in these categories are involved in a highly competitive and sometimes insecure field of activity, and we do sympathise with those proprietors who sometimes feel reluctant to give of their valuable time in order to provide highly confidential information to investigators.

The results which have been obtained are adequate however, and do provide insights into current trends in commercial activity from which town planners, and others as well, can benefit. Seen strictly from the point of view of town planners, the results might have been much more useful if the sample had been large enough to allow generalisations to be made for different types of firms within highly refined ecological zones. However, the purpose of presenting adequate conclusions for major types of firms in broader areas of the city has been well served by our results.

By and large, from the possibly over-idealistic point of view of the academic, the businessmen in retailing and personal services seemed to find it difficult to conceptualise, or sometimes even to visualise, the more specific influences operating in their fields of enterprise. We mention this in case some of the more scientifically orientated readers of this report find the results somewhat vague at times.

In presenting the major conclusions of the study, we will make no attempt to cover every aspect of the results discussed in the text. For the reader who is interested in making use of any of the detailed findings, the specific conclusions mentioned in the body of the text are probably most relevant and useful.

We will deal firstly with the results which provide a broad description of current patterns in retailing and personal services in Durban.

The geographic distribution of types of retail outlets and personal services in Durban is probably typical of most medium sized cities with extensive suburban development. We find that the outer fringe suburbs and local authority areas tend to duplicate the characteristics of the main central business district, although on a very much smaller scale, while the suburbs located nearer the central area provide mainly for convenience shopping. Hence, the proportion of personal service establishments and durables firms is highest in the Central Business District and in the fringe areas, and lowest in the suburban areas nearer the centre of town. This would suggest that Durban will ultimately be characterised by relatively independent commercial nuclei in the outlying local authority areas (very much like the present shopping complex in Pinetown). This trend is a natural reaction to the increasing distances of the outer dormitory suburbs and towns from the down-town shopping core. This pattern is also reflected in the analyses of Mean turnover figures, since the firms in the outlying local authority areas show somewhat higher Mean turnover's than similar firms in the suburbs within the Municipal Area of Durban.

As one would expect, the incidence of public company ownership of firms as opposed to private ownership, as well as the incidence of multiple branch firms, is negatively correlated with distance from the centre of town. By far the majority of company owned or multi-branch firms are situated in the Central Business District or in the Warwick Avenue/Berea/Umbilo Road complex. In the light of this, the finding that firms are generally larger in terms of total square footage in the Central Business District (excluding the Grey Street area) than they are outside the Central Business District is entirely expected. There are few important differences between the Hard Core and White Frame areas of the Central Business District in regard to the physical size of firms.

Firms in the Hard Core and Frame areas of thee Central Business District, including Grey Street, tend to make more intensive use of their total floorspace for sales purposes than do firms in the suburban areas. This fact accords well with other results which indicate that selling activity in relation to both employment and floorspace is most intense in the Central Business District, followed by the older more centrally situated suburbs, with the outlying municipal suburbs showing the lowest intensity of sales in relation to size.

The Central Business District provides more employment in both retail trade and personal services than all the suburban areas combined. This applies to all ethnic groups separately as well, except in the case of Bantu employees, where the employment outside the Central Business District is slightly greater than employment within it. The Hard Core area does not dominate the Central Business District in terms of employment, since it accounts for only roughly 55 to 60 per cent of all employment in the area. Firms in the Central Business District as a whole have roughly 70% more employees per establishment than firms in the areas outside the Central Business District.

It is important to consider the conclusions stated above in terms of the extent of the dominance of the Central Business District in the Durban Metropolitan area as a whole. However, the most direct and useful criterion of the relative importance of the Central Business District is undoubtedly the total value of sales and services in this area in comparison with the figure for non-central areas.

Our results show that the Central Business District accounts for roughly 63% of the total value of sales and services in the project area. This percentage excludes Markets, which, if added, raise the percentage slightly to 64%. Our impression is that the Central Business District in Durban is more dominant in the metropolitan region than one would expect in most cities of similar size.

Within the Central Business District, the Hard Core area accounts for only 41% of the total value of sales. In the areas outside the Central Business District, the municipal suburbs account for roughly 67% of the value of sales. The areas outside the municipal boundary, in accounting for roughly 33% of the value of sales in areas outside the Central Business District, probably reveal a higher ratio of value of sales to population than is the case in the municipal suburbs. In order to test this possibility, rough calculations were made of the ratio of the total population outside the Central Business District, but within the Durban Municipal boundary, to the population outside the municipal boundary[1]. The

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1] The population estimates used were those of Watts et. al. See H.L. Watts, R.J. Davies, G.H. Waters. <u>The Spatial Distribution of the Present and Future Population of Metropolitan Durban</u>, Institute for Social Research, Durban. 1967. Bantu areas served by the Bantu firms which had to be omitted from the analysis of retail outlets and personal services were not included in the calculations. Apart from this omission, the calculation included all ethnic groups.

population within the municipal boundary is 3.76 times as large as the population in outlying local authorities. The value of sales and services in suburban areas within the municipal boundary is however only 2.01 times as large as the value outside the municipal boundary. This is admittedly a rather rough procedure, but it does indicate that suburban shopping facilities and personal services are patronised more intensively in areas outside the Durban Municipal boundary than in suburban areas inside the municipal boundary[1].

A surprising feature of our results was the fact that so many firms in Durban appear to have been relatively recently established. Only 56% of the firms existing today had been established by 1960. Twelve per cent of the firms had been established after 1964. Only 46% of firms had been established on their present site by 1960, and as many as 31% of firms have been established where they are since 1964. These figures do seem to indicate a high rate of turnover and mobility among retail outlets and personal services in Durban.

As regards the ethnic composition of customers, it would seem that the vast majority of firms all over Durban have substantial proportions (15% +) of Non-White customers. Even in expensive White suburbs, businesses are patronised to a great extent by Non-Whites. Only in the planned shopping centres do we find that the proportions of Non-White customers are very low.

In the Central Business District, it is only in the Beachfront and Albert Park areas where all firms have a majority of White customers. In the hard Core some 90% of firms have a majority of White customers. The proportions of firms having a majority of White customers in the other central areas are as follows: Winder Street South 44%, Winder Street North 77%, Warwick/Berea/Umbilo Road complex 54%, Grey Street 7.2%. It is important to note that in the Grey Street area, some 40% of firms have a majority of Bantu customers, which gives some idea of the extent to which this area is dependent on the Bantu trade.

1] In actual fact, if we consider that many people living outside the municipal boundary work in non-C.B.D. areas inside the boundary and undoubtedly patronise shopping facilities near their places of work, the disproportion between the areas inside and areas outside the municipal boundary is increased.

A very important focus of attention in the present survey has been on the question of whether or not any trend towards increasing decentralisation of shopping and personal service facilities is taking place.

As regards results on the movement of firms from one area to another, the indications are that no significant decentralisation is taking place. It would seem, for example, as if the Central Business District Hard Core area has gained rather than lost from the movement of firms since the early Fifties. The Central Business District as a whole has also gained more from firms moving in than it has lost to other areas. The gains for the Central Business District have been mainly from the Warwick/Berea/Umbilo complex and from other cities, rather than from suburban areas. Suburban areas, might have gained from firms previously located in the Warwick/Berea/Umbilo complex, although our results are not particularly significant in this respect.

An analysis of the location or relocation of large firms indicates that, in this regard as well, there does not seem to be a trend towards suburban location in preference to the Central Business District. One small indication of a process of decentralisation is that there are slightly higher proportions of branches of durables firms in the outlying municipal and fringe suburbs than there are in the Old Borough area. This would indicate that the more widely dispersed areas are being found to be more suitable for the establishment of branches of firms than are the suburban areas closer to the city.

This tendency is supported by comparisons between present numbers of firms and the numbers existing at the time of the 1960/61 Census of Distributive Trade. These comparisons show that the increases in the numbers of firms in the suburban areas close to the centre of town are lower than the increases in the number of firms in the outlying municipal suburbs. However, the increases in the Central Business District are only slightly lower than those in the outlying suburbs so the rate of decentralisation appears to be slow. It also seems that whatever decentralisation is taking place is due mainly to the establishment of new firms or branches in the outlying municipal and fringe suburbs, rather than to the movement of firms. This trend is most marked among large variety stores.

In regard to increases in the Mean value of sales among retail outlets between 1960 and 1966, we find that in the Central Business District the increases have been roughly twice the increase in the Consumer Price Index. In the more centrally situated suburban zones, the Mean value of sales of durables outlets has increased markedly, and as such might represent a trend towards decentralised shopping. In the outlying municipal areas, only large variety firms have increased their Mean value of sales to any significant extent. On the whole however, the Central Business District seems to be the most important growth area in terms of turnover.

In terms of increases in employment however, it would seem that there has been greater growth in the outlying municipal suburbs than there has been in the Central Business District. Growth in the more centrally situated suburban areas has been slow by comparison with either the outlying areas or the Central Business District.

Generally speaking therefore, apart from slightly greater growth in employment and the establishment of new firms and branches in the outlying areas, very little decentralisation of retailing and services has been taking place in Durban.

Certain other changes which have taken place over time are significant and worthy of note.

Employment in retail outlets has increased by roughly 60% over the period between 1960 and 1965. Surprisingly enough, the increase in the employment of Bantu workers has been generally lower than that among other ethnic groups. In the Central Business District, however, the increase among Bantu employees has been higher than in the non-central areas. Coloured and Indian female employment has increased rapidly from very small numbers in 1960. White female employment has generally not increased as rapidly, and the rate of growth in this category is somewhat lower than the rate for all employees.

There would appear to have been a slight but steady increase in the size of firms since 1951, with an upsurge of growth between 1960 and 1963. The ratio of sales or service area to total square footage has, however, appeared to have remained relatively constant over the years.

In regard to financial turnover, the growth seems to have been most rapid over the period between 1962 and 1965, but with some slackening of growth after 1964 in the suburban areas, however.

There would appear to have been a general trend towards increased employment in relation to floorspace, and this increase has been slightly more marked in the suburban areas than in the Central Business District. In the Central Business District however, there would seem to have been an increase in financial turnover in relation to floorspace which has been higher than the increase in the areas outside the Central Business District, where only durables firms in the Old Borough area and large variety stores in the outlying suburbs appear to have experienced increased sales in relation to floorspace.

Turning from past changes to expectations for the future, we must utter a word of caution regarding any predictions of future growth and changes in so complex a field as retailing and personal services. However, our impressions are that businessmen in Durban are sufficiently sober in their judgement to make our results informative and useful.

Some sixteen per cent of firms intend increasing their total floorspace by an average of slightly under 100%. Two-thirds of the increases are intended to take place within one year. The most important means of acquiring additional space will be either to move to larger premises, to lease or purchase additional or adjoining premises, or to extend the present premises in some way. It would seem that more increases are intended in the Central Business District Hard Core, the Grey Street area, and in the outlying suburbs than in the Frame area or in the more centrally situated suburbs.

There would generally seem to be a positive correlation between distance from the centre of town and anticipated increases in financial turnover by 1970/71. Firms in planned centres appear to anticipate faster growth in turnover than any other firms.

It is interesting to note that our results suggest that quite considerable demand exists for the type of goods normally sold in the C.B.D., such as furniture, clothing, and household appliances, in the outlying local authority areas. Firms in these areas and in the outlying suburbs of the Durban Municipal area appear to intend meeting this demand by adding the appropriate goods to their ranges.

As regards intentions to change the location of firms, it would seem that most intended moves are to be limited to the same broad area as that in which firms are presently situated, and that these intended moves are motivated mainly by a desire to be situated on a more favourable site. Very few firms intend moving out of the Hard Core or even out of the Central Business District as a whole. There is a slight tendency for some of the larger firms in the Old Borough area to intend moving into the Hard Core. Among the smaller firms in this area, a similarly slight tendency might exist for firms to intend moving into more widely dispersed suburban areas.

Generally speaking, these findings on the changes anticipated in future years indicate that while some decentralisation of demand for durables goods seems to be taking place, very few firms intend moving to less central areas, certainly at this stage at any rate.

It is of interest, especially from a town planning point of view, to consider the various factors present in an area which are regarded as being conducive to good business. Our results suggest broadly that the following are the most important advantages which can exist for retail outlets and personal services in any particular area:

The presence of passing trade.
Accessibility in relation to transport and other facilities.
Suitable premises.
Reasonable rentals.
Parking and loading facilities.
Absence of fierce competition.
Convenient location for staff.

In the less central areas, the presence of a large or dense residential population, as well as a convenient location for deliveries from suppliers would be additional factors. Generally speaking though, businessmen in all areas would seem to be of a common mind in regard to their assessments of the factors which make an area suitable for successful trading.

However, when it comes to specific complaints about different areas, businessmen in the Hard Core are definitely more verbal in their criticisms of their area than those in any other area. They complain mainly about the restricted size of premises, the absence of adequate parking and loading facilities, and about high rentals.

Businessmen in the Grey Street area complain about much the same things, although the complaint of fierce competition can be added to the list. However, Indian businessmen in the Grey Street area have far fewer complaints about their area than businessmen anywhere else.

Elsewhere in the project region, specific complaints are much the same as those in the Hard Core area, apart from being generally fewer in number. Indian businessmen generally have serious complaints about the insecurity which Group Areas Legislation causes them, and also about premises which might be large enough but are unsuitable in other respects. They also complain about the poor quality of the areas in which they run their businesses. They are, however generally more satisfied than dissatisfied with their locations at the moment. They regard their positions as being particularly suitable in relation to passing trade and general accessibility. Indians are therefore not at all well disposed to the possibility of having to move to less-centrally located suburban areas.

The suburbs are generally regarded by businessmen as being more unfavourable than favourable places in which to locate their businesses. As many as 50% of businessmen in the Hard Core, and even higher proportions in the Frame, Grey Street, and Warwick/Berea/Umbilo complex see absolutely no advantages in being located in the suburbs. The major drawbacks in the suburbs are seen as being the absence of passing trade, the fact that customers prefer shopping in the centre of town, that only a limited area can be served by suburban firms, and the fact that there is insufficient demand, particularly for durable goods. One very specific disadvantage that exists for convenience stores in the suburban areas is the presence of fierce competition from the chain stores and supermarkets. Generally speaking though, it is durables and personal service firms that see least advantages to being in the suburbs, and it is large variety firms for which the suburbs hold the greatest attractions.

These conclusions tend to reinforce the opinion stated earlier that any decentralisation of shopping from central to suburban areas is likely to be due to the establishment of new outlets and branches rather than to the movement of existing firms into the suburbs.

One important incentive to decentralisation of this type will be the establishment of greater numbers of planned shopping centres in the suburbs. Our results show that some 85 per cent of firms in existing planned centres are new firms and not firms which have moved from other premises.

The factors which appear to attract firms to planned centres and the advantages perceived in planned centres are that planned centres are located in areas favourable for business, (i.e. near large or dense residential complexes), and that they attract passing trade by virtue of the concentration of a variety of different shops and services. Furthermore, the premises in planned centres are regarded as highly suitable. The adequate parking facilities offered are regarded as an important advantage, as is the fact that the practice of allowing only one firm of a type to operate reduces the amount of competition for firms established in planned centres. Apart from these specific advantages, planned centres are unanimously regarded as having an excellent future, particularly once Durban shoppers become accustomed to shopping in less-central areas, which many businessmen in planned centres consider to be a habit which has not yet gained great acceptance.

It is obvious from our results that tenants in planned centres are generally far more satisfied with their locations and premises than businessmen are in any other areas. This is a good indication that planned shopping centres will continue to attract almost unlimited numbers of tenants, provided they are favourably designed and located.

One of the most essential features in the design of planned centres is that they should contain a sufficient variety of types of shops and services, as well as a bank, post office, a dry cleaning establishment, and, if possible, doctors or dentists consulting rooms. Another

Another crucial feature in a successful planned centre is a popular supermarket or department store, preferably located in such a way that the large numbers of customers attracted by such a store have to walk past the other firms in the centre.

As regards the location of planned centres, it would seem that they are best located centrally in relation to fairly dense concentrations of lower middle to middle class dwellings in areas which are either new or undergoing fairly rapid change, and which are not too near the centre of the city.

In conclusion, we would like to express the hope that some of the many inconclusive findings mentioned in this report will receive the attention of subsequent investigators in Durban. We would also be gratified to learn of some of the more conclusive findings being applied to planning in Durban, not only by the present consultants to the Durban Corporation, but also in the course of the more regular planning undertaken in the city.

A P P E N D I X   A.

TABLES.

TABLE I

Percentage Distribution of Firms in terms of type of Ownership according to type of Establishment and Major Ecological Zones.

Type of Ownership	Market		Hard Core of Central Business District					Grey Street Areas		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Individual Owner	66.7	68.0	70.6	57.1	5.9	36.4		66.7	82.7	36.0
Partnership		32.0	5.9		5.9	9.1		33.3		33.6
Public Company	33.3				23.6	18.2	71.4			6.7
Private Company			23.5	42.9	64.6	36.4	28.6		17.3	23.7
Co-operative										
Other										
No Information										
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Total No. of Firms	21	170	148	76	93	233	14	182	228	438

TABLE I (Contd.)

Type of Ownership	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Individual Owner	74.1	50.6	6.4	59.0		74.9	77.2	24.6	
Partnership	13.0	14.4		12.1		18.7	6.4	15.1	
Public Company			38.7	1.6				9.6	
Private Company	13.0	34.9	54.9	27.3	100	6.4	16.4	50.6	100
Co-operative									
Others									
No information									
Total	100	100	100	100	100	100	100	100	100
Total No. of Firms	67	224	85	176	3	79	427	235	1

TABLE I (Contd.)

Type of Ownership	Rest of Durban Municipal Area				Outside Durban Municipal Area				Total
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
Individual Owner	67.7	75.9	55.5		85.7	68.3	55.7		59.0
Partnership	32.3	1.3	9.0		14.3	23.0	5.5		12.8
Public company			10.1	51.3		1.0	16.6	50.0	5.0
Private company		16.9	25.3	48.7		7.7	22.1	50.0	22.0
Co-operative									-
Others		5.9							1.1
No information									-
Total	100	100	100	100	100	100	100	100	100%
Total No. of Firms	109	814	244	8	37	269	143	8	4528

Note : The following are the abbreviations used :

P/S = Personal Service Establishments.

Conv. = Convenience Goods.

L/Dur. = Establishments selling large durable goods.

S/Dur. = Establishments selling small durable goods.

L/Var. = Large variety stores.

TABLE II

Percentage Distribution of Firms according to the Number of Branches in the Durban Area by Type of Establishment and Ecological Zone.

Number of Branches in Durban	Market		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
No information							14.3			
Only branch	100	88.0	100	71.4	58.6	54.5	42.9	91.7	91.3	77.6
2 branches		4.0		28.6	17.7	22.7		8.3	8.7	22.4
3 branches		8.0			5.9					
4 branches										
5 branches					5.9	4.5				
6 branches						4.5	14.3			
7 branches					5.9	4.5	28.6			
8 branches										
9 or more branches					5.9	9.1				
Total	100	100	100	100	100	100	100	100	100	100
Total No. of Firms	21	170	148	76	93	233	14	182	228	438

TABLE II (Contd.)

Number of Branches in Durban	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
No information				6.0				1.2	
Only branch	74.1	89.1	51.6	72.7		81.7	89.0	77.1	
2 branches	25.9	6.1	3.3	6.0		6.4	7.9	9.6	100
3 branches		4.8	25.8	6.0		6.0		8.4	
4 branches			6.4						
5 branches			6.4			6.0			
6 branches							3.1		
7 branches			6.4		100			1.2	
8 branches									
9 or more branches				9.2				2.4	
Total	100	100	100	100	100	100	100	100	100
Total No. of Firms	67	224	85	176	3	79	427	235	1

TABLE II (Contd.)

Number of Branches in Durban	Rest of Durban Municipal Area				Outside Durban Municipal Area				Total
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
No information									.3
Only branch	100	90.3	83.4		85.7	95.1	81.4		83.3
2 branches		9.7			14.3	4.9	2.0		9.7
3 branches				35.9				25.0	2.0
4 branches			6.4					25.0	.5
5 branches				15.4			5.5	25.0	.8
6 branches			3.0	16.7			5.5		.9
7 branches				32.1				25.0	.8
8 branches			6.0				5.5		.5
9 or more branches			1.1						1.1
Total	100	100	100	100	100	100	100	100	100
Total No. of Firms	109	814	244	8	37	269	143	8	4528

TABLE III

Percentage Distribution of Main and Subsidiary Branches according to Type of Establishment and Ecological Zone.

Type of Branch	Market		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
No information								8.3		
Main/Only branch	100	88.0	100	100	70.5	81.8	85.7	75.0	91.3	91.0
Subsidiary branch		12.0			29.5	18.2	14.3	16.7	8.7	9.0
Total	100	100	100	100	100	100	100	100	100	100
Total No. of Firms	21	170	148	76	93	233	14	182	228	438

Type of Branch	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
No information	4.2	1.2	6.4	6.0			3.1	10.8	
Main/Only branch	82.9	97.5	58.0	78.7		94.0	90.8	80.2	100
Subsidiary branch	13.0	1.2	35.5	15.3	100	6.0	6.1	9.0	
Total	100	100	100	100	100	100	100	100	100
Total No. of Firms	67	224	85	176	2	79	427	235	1

TABLE III (Contd.)

Type of Branch	Rest of Durban Municipal Area				Outside Durban Municipal Area				Total
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
No information			20.7		14.3	12.5	3.9		3.8
Main/Only branch	100	97.1	62.7		85.7	86.4	77.5	25.0	87.1
Subsidiary branch		2.9	16.6	100		1.0	18.6	75.0	9.1
Total	100	100	100	100	100	100	100	100	100
Total No. of Firms	109	814	246	8	37	269	143	8	4528

TABLE IV

Total and Average Square Footage of Premises (incl. on Site Storage) presented according to Type of Outlet and Major Ecological Zones, with Percentage Distribution within zones. Note: Rounded No. of Establishments within each Category appear in Brackets.

Type of Outlet	Major Ecological Zones: Hard Core			Grey Street			Rest of C.B.D.			Outside C.B.D.		
	Total	Ave.	% of Total Floorspace	Total	Ave.	% of Total Floorspace	Total	Ave.	% of Total Floorspace	Total	Ave.	% of Total Floorspace
Personal Service	158070 (148)	1068	6.4	60950 (182)	334	6.9	26538 (67)	396	1.0	164930 (225)	733	3.2
Convenience	75700 (76)	1001	3.0	423960 (228)	1864	48.0	227980 (224)	1018	8.3	2247943 (1509)	1490	43.8
(Small Durables)	589250 (233)	2529	(23.7)	Not sep. class			177540 (176)	1009	(6.5)	Not sep. class		
(Large Durables)	459070 (93)	4936	(18.5)	Not sep. class			2249690 (85)	26467	(82.4)	Not sep. class		
All Durables	1048320 (326)	3213	42.2	398260 (438)	910	45.1	2427230 (261)	9300	88.9	2421254 (621)	3899	47.2
Large Variety	1200336	85738	48.4				49000 (3)	16333	1.8	295130 (17)	17361	5.8
(Planned Centre's) Included in above.							(75068) (31)	(2422)	(2.7)	(144357) (78)	(1851)	(2.8)
All Outlets	2482426 (565)	4394	100.0	883170 (847)	1042	100.0	2730748 (555)	4920	100.0	5129257 (2372)	2162	100.0

TABLE V

Total and Average Sales or Service Area of Premises presented according to Type of Outlet and Major Ecological Zone, with Percentage Distribution within Zones. Note: Rounded No. of Establishments within each category appear in Brackets.

Type of Outlet	Major Ecological Zones: Hard Core Total	Hard Core Ave.	Hard Core % of Total Floorspace	Grey Street Total	Grey Street Ave.	Grey Street % of Total Floorspace	Rest of C.B.D. Total	Rest of C.B.D. Ave.	Rest of C.B.D. % of Total Floorspace	Outside C.B.D. Total	Outside C.B.D. Ave.	Outside C.B.D. % of Total Floorspace
Personal Service	104480 (148)	706	6.2	44840 (182)	245	7.5	19830 (67)	296	1.9	85840 (225)	382	3.2
Convenience	46870 (76)	620	2.8	290050 (228)	1275	48.7	149788 (224)	669	14.7	1436711 (1509)	952	54.0
(Small Durable)	340890 (233)	1463	(20.3)	Not sep. class			105450 (176)	599	(10.3)	Not sep. class		
(Large Durable)	319270 (93)	3433	(19.0)	Not sep. class			717040 (85)	8436	(70.2)	Not sep. class		
All Durables	660160 (326)	2025	39.3	260170 (438)	594	43.7	822490 (261)	3151	80.5	980874 (621)	1580	36.9
Large Variety	868208 (14)	62015	51.7				29400 (3)	9800	2.9	158160 (17)	9304	5.9
(Planned Centres) Included in above							(51018) (31)	(1646)	(5.0)	(97985) (78)	(1256)	(3.7)
All Outlets	1679718 (564)	2973	100.0	595060 (847)	702	99.9	1021508 (555)	1841	100.0	2661585 (2372)	1122	100.0

TABLE VI

Percentage Distribution of Total Internal Floorspace of Firms within Size Categories according to Type of Establishment and Ecological Zones.

Total Floorspace of Firm	Type of Outlet and Ecological Zone									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Under 25 sq. ft.		8.0								
25 - 49 sq. ft.		12.0							8.7	
50 - 74 sq. ft.		12.0						8.3		
75 - 99 sq. ft.		4.0								
100 - 149 sq. ft.		12.0	5.9							
150 - 199 sq. ft.		4.0	5.9					16.7		
200 - 299 sq. ft.		28.0	11.8		5.9	13.6		16.7		13.4
300 - 399 sq. ft.		8.0	17.6			9.1		33.3	17.3	13.4
400 - 499 sq. ft.	66.7	4.0	5.9	14.3		4.5		16.7		6.7
500 - 749 sq. ft.		4.0	11.8	28.6		13.6				40.3
750 - 999 sq. ft.					5.9	9.1		8.3	17.3	
1000 - 1499 sq. ft.		4.0	11.8	28.6	23.6	9.1			34.6	20.2
1500 - 1999 sq. ft.			11.8	28.6	5.9	9.1				
2000 - 2999 sq. ft.	33.3		17.6		23.2	4.5			4.7	2.3
3000 - 3999 sq. ft.						9.1	14.3			
4000 - 4999 sq. ft.						4.5				2.4
5000 - 7499 sq. ft.					11.8	9.1			8.7	
7500 - 9999 sq. ft.					11.8				8.7	
10000 - 19999 sq. ft.					11.8					1.3
20000 - 34999 sq. ft.						4.5	14.3			
35000 - 49999 sq. ft.										
50000 - 74999 sq. ft.							28.6			
75000 - 99999 sq. ft.										
100000 sq. ft. plus							42.9			
No information										
Total	100	100	100	100	100	100	100	100	100	100
Estimated Total No. of Firms	21	170	148	76	93	233	14	182	228	438
Median	474.5	174.5	560.9	1123.7	2374.5	1005.0	68707.0	324.4	1096.3	601.9

TABLE VI (Contd.)

Total Floorspace of Firm	Type of Outlet and Ecological Zone								
	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 25 sq. ft.									
25 - 49 sq. ft.									
50 - 74 sq. ft.									
75 - 99 sq. ft.	22.7								
100 - 149 sq. ft.	4.2						1.5		
150 - 199 sq. ft.				6.0		6.4	3.3	1.2	
200 - 299 sq. ft.	17.1			22.8			2.4	1.2	
300 - 399 sq. ft.						25.5	6.4	1.2	
400 - 499 sq. ft.	26.0	4.8		6.0		25.5	10.7		
500 - 749 sq. ft.	26.0	30.1	6.4	19.7		12.4	11.8	13.9	
750 - 999 sq. ft.		20.5		7.6		18.3	32.8	27.7	
1000 - 1499 sq. ft.	4.2	25.3	6.4	12.1		6.0	7.2	15.1	
1500 - 1999 sq. ft.		14.4	9.7	6.0			3.3	4.2	
2000 - 2999 sq. ft.		4.8	6.4	13.7			15.7	4.2	100
3000 - 3999 sq. ft.				6.0			2.4	1.2	
4000 - 4999 sq. ft.			12.9					1.2	
5000 - 7499 sq. ft.			6.4				2.4	6.0	
7500 - 9999 sq. ft.			6.4					7.2	
10000 - 19999 sq. ft.			19.3		100	6.0		4.2	
20000 - 34999 sq. ft.			6.4					8.5	
35000 - 49999 sq. ft.			6.4						
50000 - 74999 sq. ft.									
75000 - 99999 sq. ft.			6.4					3.0	
100000 sq. ft. plus			6.4						
No information									
Total	100	100	100	100	100	100	100	100	100
Estimated Total No. of Firms	67	224	85	176	3	79	427	235	1
Median	422.6	933.8	8202.0	692.5	14999.5	470.5	855.5	1158.5	2499.5

TABLE VI (Contd.)

Total Floorspace of Firm	Type of Outlet and Ecological Zone								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
Under 25 sq. ft.									.3
25 - 49 sq. ft.	4.8								1.0
50 - 74 sq. ft.									.8
75 - 99 sq. ft.									.5
100 - 149 sq. ft.	13.8				14.3				1.3
150 - 199 sq. ft.	27.5				14.3				2.5
200 - 299 sq. ft.	18.5				14.3				6.2
300 - 399 sq. ft.	18.5	13.1			14.3	7.7	11.1		9.7
400 - 499 sq. ft.		29.6	7.6			3.8	3.9		10.9
500 - 749 sq. ft.	4.8	16.9	39.0		28.6	21.3	35.2		18.2
750 - 999 sq. ft.	4.8	7.2				7.7	11.1		10.1
1000 - 1499 sq. ft.	7.3	18.5	12.4		14.3	15.3	5.5		14.5
1500 - 1999 sq. ft.		1.3	15.9	15.4		4.9		25.0	4.5
2000 - 2999 sq. ft.		3.8	13.1			15.3	5.5		7.0
3000 - 3999 sq. ft.		8.4	3.0	16.7		4.9	5.5		3.2
4000 - 4999 sq. ft.			3.0						.9
5000 - 7499 sq. ft.		1.3				3.8	16.6		2.8
7500 - 9999 sq. ft.			3.0			3.8	5.5		1.7
10000 - 19999 sq. ft.			3.0	15.4		11.5		25.0	2.0
20000 - 34999 sq. ft.				52.6				25.0	1.0
35000 - 49999 sq. ft.								25.0	.2
50000 - 74999 sq. ft.									.1
75000 - 99999 sq. ft.									.3
100000 sq. ft. plus									.3
No information									
Total	100	100	100	100	100	100	100	100	100
Estimated Total No. of Firms	109	814	244	8	37	269	143	8	
Median	220.6	607.5	1136.6	20719.5	349.2	1310.0	748.0	19999.5	730.3

Medians for grouped areas Outside Central Business District: Personal Service 345.7 Convenience 781.4
Durables 1023.5 Large Variety 19062.0

TABLE VII

Percentage Distribution of Sales and Customer Service Areas of Firms within Size Categories according to Type of Establishment and Ecological Zones.

Sales Area of Firm	Type of Outlet and Ecological Zone									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Under 25 sq. ft.		12.0						8.3		
25 - 49 sq. ft.		12.0							8.7	
50 - 74 sq. ft.		20.0			11.8					6.7
75 - 99 sq. ft.		4.0						16.7		6.7
100 - 149 sq. ft.	33.3	20.0	5.9					16.7		6.7
150 - 199 sq. ft.		4.0	5.9						8.7	
200 - 299 sq. ft.		16.0	11.8	14.3		22.7		33.3	8.7	6.7
300 - 399 sq. ft.		4.0	23.5	14.3		18.2		16.7		13.4
400 - 499 sq. ft.	33.3		5.9	28.6		4.5				13.4
500 - 749 sq. ft.		4.0	11.8	14.3	17.7	9.1			26.0	22.6
750 - 999 sq. ft.	33.3	4.0	5.9		5.9			8.3	17.3	13.4
1000 - 1499 sq. ft.			11.8	28.6	5.9	4.5			8.7	6.7
1500 - 1999 sq. ft.			11.8			9.1			4.7	2.3
2000 - 2999 sq. ft.			5.9		17.3	22.7	14.3			
3000 - 3999 sq. ft.					11.8	4.5			8.7	
4000 - 4999 sq. ft.										
5000 - 7499 sq. ft.					11.8				8.7	
7500 - 9999 sq. ft.										1.3
10000 - 19999 sq. ft.					17.7	4.5	14.3			
20000 - 34999 sq. ft.										
35000 - 49999 sq. ft.							28.6			
50000 - 74999 sq. ft.										
75000 sq. ft. plus							42.9			
Cannot distinguish										
No information										
Total	100	100	100	100	100	100	100	100	100	100
Estimated Total No. of Firms	21	170	148	76	93	233	14	182	228	438
Median	449.65	104.5	448.7	474.3	2502.4	625.9	46224.0	224.4	729.3	472.6

TABLE VII (Contd.)

Sales Area of Firm	Type of Outlet and Ecological Zone								
	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 25 sq. ft.									
25 - 49 sq. ft.								3.0	
50 - 74 sq. ft.	22.7						3.9		
75 - 99 sq. ft.								5.4	
100 - 149 sq. ft.	4.2						3.9	1.2	
150 - 199 sq. ft.				28.8		6.4	2.4		
200 - 299 sq. ft.	43.1		6.4			19.1	3.1	4.3	
300 - 399 sq. ft.		9.6	6.4	12.1		37.8	19.2	1.2	
400 - 499 sq. ft.		20.5		6.0		6.4	14.9	9.6	
500 - 749 sq. ft.	25.9	34.9		33.4		18.3	23.9	32.0	
750 - 999 sq. ft.		25.3	6.4			6.0	10.9		
1000 - 1499 sq. ft.	4.2	4.8	16.2	18.1			2.4	10.8	100
1500 - 1999 sq. ft.		4.8		1.6			7.7	1.2	
2000 - 2999 sq. ft.			12.9			6.0	5.2	5.4	
3000 - 3999 sq. ft.								6.0	
4000 - 4999 sq. ft.			6.4					8.4	
5000 - 7499 sq. ft.							2.4	8.5	
7500 - 9999 sq. ft.			6.4						
10000 - 19999 sq. ft.			38.7		100			3.0	
20000 - 34999 sq. ft.									
35000 - 49999 sq. ft.									
50000 - 74999 sq. ft.									
75000 sq. ft. plus									
Cannot distinguish									
No information									
Total	100	100	100	100	100	100	100	100	100
Estimated Total No. of Firms	67	224	85	176	3	79	427	235	1
Median	253.1	642.1	4265.1	522.7	14999.5	364.3	526.75	697.25	1249.5

TABLE VII (Contd.)

Sales Area of Firm	Type of Outlet and Ecological Zone								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
Under 25 sq. ft.									.8
25 - 49 sq. ft.	4.8								1.2
50 - 74 sq. ft.									2.3
75 - 99 sq. ft.					14.3				1.9
100 - 149 sq. ft.	13.8		3.0		14.3	7.7			4.0
150 - 199 sq. ft.	41.3	5.9					5.5		4.5
200 - 299 sq. ft.	9.5	19.0	3.0		28.6	3.8	2.0		10.7
300 - 399 sq. ft.	13.8	30.8	10.6			5.9	16.6		14.9
400 - 499 sq. ft.		2.5	25.3		14.3	19.2	13.0		9.1
500 - 749 sq. ft.	4.8	18.2	13.6		14.3	16.4	29.6		18.8
750 - 999 sq. ft.	12.1	15.6	9.4		14.3	3.8			9.6
1000 - 1499 sq. ft.		1.6	3.0	15.4		7.7	5.5	25.0	5.6
1500 - 1999 sq. ft.						4.9			3.9
2000 - 2999 sq. ft.		5.1	6.0	16.7		11.5	5.5		5.0
3000 - 3999 sq. ft.		1.3					5.5		1.6
4000 - 4999 sq. ft.						3.8	11.1		1.1
5000 - 7499 sq. ft.			3.0			7.7	5.5		2.1
7500 - 9999 sq. ft.								25.0	.3
10000 - 19999 sq. ft.				67.9		7.7		50.0	2.2
20000 - 34999 sq. ft.									–
35000 - 49999 sq. ft.									.1
50000 - 74999 sq. ft.									–
75000 sq. ft. plus									.1
Cannot distinguish									–
No information									
Total	100	100	100	100	100	100	100	100	100
Estimated Total No. of Firms	109	814	244	8	37	269	143	8	4528
Median	187.5	381.0	648.5	12639.5	274.3	703.8	608.5	9999.5	507.5

Medians for grouped areas Outside Central Business District: Personal Service 287.0 Convenience 484.4
Durables 661.3 Large Variety 10967.3

TABLE VIII

Percentage Distribution of Total Internal Floorspace of Firms with Size Categories according to Detailed Location of Establishment.

Total Floorspace of Firm	LOCATION OF FIRM					
	Central Business District					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
0 - 24 sq. ft.		1.3				
25 - 49 sq. ft.		3.9				
50 - 74 sq. ft.		3.5				
75 - 99 sq. ft.		.7				5.7
100 - 149 sq. ft.	1.5	2.0	2.6			
150 - 199 sq. ft.	1.5	3.7	10.0			
200 - 299 sq. ft.	9.7	13.4	2.6	12.1	26.7	4.0
300 - 399 sq. ft.	8.4	17.0				
400 - 499 sq. ft.	5.3	6.5		12.1	9.8	7.2
500 - 749 sq. ft.	12.6	18.0	15.3	22.7	29.2	22.6
750 - 999 sq. ft.	4.7	5.4	25.7		9.6	8.1
1000 - 1499 sq. ft.	14.6	17.1	15.5	37.7		16.0
1500 - 1999 sq. ft.	11.6		12.7		19.6	6.1
2000 - 2999 sq. ft.	10.3	2.0	12.9			10.0
3000 - 3999 sq. ft.	4.1					4.0
4000 - 4999 sq. ft.	1.9	1.0				4.1
5000 - 7499 sq. ft.	5.7	1.9				2.1
7500 - 9999 sq. ft.	2.0	1.9				2.1
10000 - 19999 sq. ft.	2.0	.5	2.6	15.3		2.1
20000 - 34999 sq. ft.	2.2					2.1
35000 - 49999 sq. ft.						2.1
50000 - 74999 sq. ft.	.7					
75000 - 99999 sq. ft.						2.1
100000 - 149999 sq. ft.	.7				5.0	
150000 - 199000 sq. ft.	.4					
Total Firms	100	100	100	100	100	100
Mean	4461	977	1479	2996	6965	4994
Total Floorspace	2514873	993927	156462	215117	766855	1335806
Median	1215.3	468.7	939.2	1040.6	615.0	1574.5

TABLE VIII (Contd.)

Total Floorspace of Firm	LOCATION OF FIRM						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
0 - 24 sq. ft.							
25 - 49 sq. ft.					5.4		
50 - 74 sq. ft.							
75 - 99 sq. ft.							
100 - 149 sq. ft.		1.6				4.3	
150 - 199 sq. ft.		4.6	1.8			4.3	2.3
200 - 299 sq. ft.		2.5	1.8			4.3	.8
300 - 399 sq. ft.	5.2	7.8	4.9	7.3	15.6	13.9	8.8
400 - 499 sq. ft.	12.4	9.4	10.8		2.9	27.8	24.2
500 - 749 sq. ft.	15.5	13.3	5.3	92.6	10.5	12.1	18.1
750 - 999 sq. ft.	32.7	30.0	20.9				9.6
1000 - 1499 sq. ft.	17.9	5.9	7.7		26.7	16.9	15.8
1500 - 1999 sq. ft.		5.8			1.2	11.2	1.6
2000 - 2999 sq. ft.	3.8	4.9	36.7		21.3		6.4
3000 - 3999 sq. ft.			8.3		12.1	3.0	8.4
4000 - 4999 sq. ft.			1.8				1.1
5000 - 7499 sq. ft.		5.9					1.6
7500 - 9999 sq. ft.		4.1					1.1
10000 - 19999 sq. ft.	7.6					2.1	.2
20000 - 34999 sq. ft.	5.1	2.4			4.3		
35000 - 49999 sq. ft.							
50000 - 74999 sq. ft.							
75000 - 99999 sq. ft.		1.7					
100000 - 149999 sq. ft.							
150000 - 199000 sq. ft.							
Total Firms	100	100	100	100	100	100	100
Mean	3322	3618	1672	604	2619	1100	1292
Total Floorspace	639426	1487232	263916	42847	251420	380164	854522
Median	878.7	839.5	1291.7	614.8	1291.7	483.0	691.5

TABLE VIII (Contd.)

Total Floorspace of Firm	LOCATION OF FIRM							Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga etc.	Other	
0 - 24 sq. ft.								.3
25 - 49 sq. ft.								1.0
50 - 74 sq. ft.								.8
75 - 99 sq. ft.								.5
100 - 149 sq. ft.		3.1						1.3
150 - 199 sq. ft.					12.7			2.5
200 - 299 sq. ft.			4.1					6.2
300 - 399 sq. ft.		9.1	12.2	33.3				9.7
400 - 499 sq. ft.			8.0			11.8		10.8
500 - 749 sq. ft.	36.9	37.9	20.1			28.8		18.2
750 - 999 sq. ft.		16.6	6.1					10.1
1000 - 1499 sq. ft.		21.2	6.1	33.3				14.5
1500 - 1999 sq. ft.	28.8					10.1		4.5
2000 - 2999 sq. ft.		6.0	22.0	33.3				7.0
3000 - 3999 sq. ft.		6.0	6.1			5.9		3.2
4000 - 4999 sq. ft.								.9
5000 - 7499 sq. ft.			12.2		43.6			2.8
7500 - 9999 sq. ft.	28.8				18.9			1.7
10000 - 19999 sq. ft.	5.6				24.7	43.3		2.0
20000 - 34999 sq. ft.			1.5					1.0
35000 - 49999 sq. ft.			1.5					.2
50000 - 74999 sq. ft.								.1
75000 - 99999 sq. ft.								.3
100000 - 149999 sq. ft.								.2
150000 - 199000 sq. ft.								.05
Total Firms	100	100	100	100	100	100		100.0
Mean	4089	1044	2951	1366	4404	7121		
Total Floorspace	146382	178587	382175	42215	183654	338247		
Median	1726.9	748.6	979.0	1250.2	7138.3	1964.9		

TABLE IX

Percentage Distribution of Sales/Customer Service Areas within Size Categories according to Detailed Location of Firm.

Sales/Customer Service Area	LOCATION OF FIRM					
			Central Business District			
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
0 - 24 sq. ft.		3.5				
25 - 49 sq. ft.		4.0				
50 - 74 sq. ft.	2.0	6.2				5.7
75 - 99 sq. ft.		6.5				
100 - 149 sq. ft.	1.5	9.2	2.6			
150 - 199 sq. ft.	1.5	2.6	10.0		26.7	4.0
200 - 299 sq. ft.	14.4	13.5	2.6	24.2		5.3
300 - 399 sq. ft.	15.6	9.4		7.7	9.8	12.0
400 - 499 sq. ft.	7.3	5.8	12.7	15.0	9.8	8.1
500 - 749 sq. ft.	11.7	16.2	28.4	15.0	38.9	26.5
750 - 999 sq. ft.	2.5	11.8	12.9	22.7	9.8	8.1
1000 - 1499 sq. ft.	9.8	4.8	15.3			16.1
1500 - 1999 sq. ft.	6.8	2.0	12.9			
2000 - 2999 sq. ft.	14.2					4.1
3000 - 3999 sq. ft.	3.8	1.9				
4000 - 4999 sq. ft.				7.7		
5000 - 7499 sq. ft.	2.0	1.9				
7500 - 9999 sq. ft.		.5				2.1
10000 - 19999 sq. ft.	5.2		2.6	7.7	5.0	8.2
20000 - 34999 sq. ft.						
35000 - 49999 sq. ft.	.7					
50000 - 74999 sq. ft.						
75000 - 109999 sq. ft.	.7					
110000 - 139999 sq. ft.	.4					
Total Cases	100	100	100	100	100	100
Mean	3251	659	1184	1941	1196	2054
Total Area	1832691	667371	125317	139362	131695	549402
Median	664.0	347.4	694.0	551.2	523.3	640.1

TABLE IX (Contd.)

Sales/Customer Service Area	LOCATION OF FIRM						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
0 - 24 sq. ft.							
25 - 49 sq. ft.		1.7			5.4		
50 - 74 sq. ft.		4.1					
75 - 99 sq. ft.	5.1		1.8				
100 - 149 sq. ft.	3.6	3.4	3.5			4.3	1.1
150 - 199 sq. ft.		3.7				8.7	9.5
200 - 299 sq. ft.		6.2	8.2	75.2		16.9	9.2
300 - 399 sq. ft.	20.1	14.8	9.4		18.5	27.8	26.9
400 - 499 sq. ft.	13.9	17.3		24.8	7.6	12.1	2.4
500 - 749 sq. ft.	33.4	19.2	30.6		2.9	13.9	20.4
750 - 999 sq. ft.	6.0	11.3			26.7		20.8
1000 - 1499 sq. ft.	5.1	4.0	6.5		8.9	3.0	.4
1500 - 1999 sq. ft.			22.5		2.9	11.2	2.2
2000 - 2999 sq. ft.	7.6		16.0		22.8	2.1	4.2
3000 - 3999 sq. ft.		3.4					1.6
4000 - 4999 sq. ft.		4.1	1.8				
5000 - 7499 sq. ft.	5.1	4.9					1.1
7500 - 9999 sq. ft.							
10000 - 19999 sq. ft.		1.7			4.3		.2
20000 - 34999 sq. ft.							
35000 - 49999 sq. ft.							
50000 - 74999 sq. ft.							
75000 - 109999 sq. ft.							
110000 - 139999 sq. ft.							
Total Cases	100	100	100	100	100	100	100
Mean	978	1297	1203	299	1725	585	753
Total Area	188280	533062	189819	21210	165587	202149	497821
Median	554.1	492.6	720.9	266.0	895.6	371.8	510.5

TABLE IX (Contd.)

Sales/Customer Service Area	LOCATION OF FIRM							Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga etc.	Other	
0 - 24 sq. ft.								.8
25 - 49 sq. ft.								1.2
50 - 74 sq. ft.								2.3
75 - 99 sq. ft.					12.7			1.9
100 - 149 sq. ft.		3.1	8.0	33.3				4.0
150 - 199 sq. ft.			6.1					4.5
200 - 299 sq. ft.		9.1	4.1			5.9		10.7
300 - 399 sq. ft.		10.6	12.2			11.8		14.9
400 - 499 sq. ft.	36.9	22.7	8.0	33.3		5.9		9.1
500 - 749 sq. ft.		33.3	18.3			22.9		18.8
750 - 999 sq. ft.	28.8	3.1						9.6
1000 - 1499 sq. ft.		6.0	14.1			4.2		5.6
1500 - 1999 sq. ft.			8.0			5.9		3.9
2000 - 2999 sq. ft.		12.0	6.1	33.3				5.0
3000 - 3999 sq. ft.					18.9			1.6
4000 - 4999 sq. ft.			6.1		43.6			1.1
5000 - 7499 sq. ft.	28.8		6.1		24.7			2.1
7500 - 9999 sq. ft.	5.6							.3
10000 - 19999 sq. ft.			3.1			43.4		2.2
20000 - 34999 sq. ft.								
35000 - 49999 sq. ft.								.1
50000 - 74999 sq. ft.								
75000 - 109999 sq. ft.								.1
110000 - 139999 sq. ft.								.04
Total Cases	100	100	100	100	100	100		100
Mean	2704	697	1808	1024	4181	6886		
Total Area	96810	119221	234160	31657	174368	327109		
Median	863.2	533.3	658.0	449.7	4421.5	1416.2		

TABLE X

Estimated Total and Average Employment by Race and Sex according to type of Firm within Major Ecological Zones.

Type of Establishment and Zone.	White Males	Ave.	White Females	Ave.	Col. M	Ave.	Col. F	Ave.	Ind. M	Ave.	Ind. F	Ave.	Bantu M	Ave.	Bantu F	Ave.	Total	Ave.
Hard Core - P/S	243	1.6	1444	9.7	-	-			269	1.8	-	-	78	.5	78	.5	2112	14.3
- Conv.	64	.8	151	2.0	-	-	43	.5	97	1.2	10	.1	216	2.8	43	.5	624	8.2
- L/Dur.	488	5.2	285	3.0	27	.2	-	-	187	2.0	5	-	543	5.8	5	-	1540	16.6
- S/Dur.	614	2.6	1060	4.5	21	-	42	.1	360	1.5	21	-	402	1.7	21	-	2541	10.9
- L/Var.	402	28.7	2808	200.5	2	.1	150	10.7	224	16.0			910	65.0	18	1.2	4514	322.4
Total (Retail)	1568	3.8	4304	10.3	50	.1	235	.6	868	2.1	36	.1	2071	5.0	87	.2	9219	22.2
Grey St. - P/S	-	-							516	2.8	30	.1	-	-	-	-	546	3.0
- Conv.	-	-							1150	5.0	148	.6	159	.7	59	.2	1516	6.6
- Dur.	44	.1	33	.1					1573	3.5	172	.3	161	.3	34	.0	2017	4.6
Total (Retail)	44	.1	33	-					2723	4.1	320	.5	320	.5	93	.1	3533	5.3
Rest of C.B.D. - P/S	46	.6	118	1.7					15	.2	34	.5	8	.1	26	.3	247	3.7
- Conv.	346	1.5	270	1.2			21	-	227	1.0	21	-	486	2.1	140	.6	1511	6.7
- L/Dur.	1672	19.6	475	5.5	11	.1			775	9.0	11	.1	1595	18.6	27	.3	4566	53.7
- S/Dur.	98	.5	207	1.1			31	.1	160	.9			122	.6	10	-	628	3.6
- L/Var.	2	1.0	56	20.0			5	2.0	2	1.0			33	12.0	-	-	98	32.7
Total (Retail)	2118	4.3	1008	2.1	11	-	57	.1	1164	2.4	32	.1	2236	4.6	177	.4	6803	13.9
Warwick/Berea/ Umbilo/ Central - P/S	94	1.2	195	2.4	5	-	5	-	102	1.3	10	.1	197	2.5	14	.1	622	7.9
- Conv.	366	.8	505	1.1	44	.1	72	.1	424	.9	74	.1	620	1.4	68	.1	2173	5.1
- Dur.	972	4.1	423	1.8	99	.4	12	-	942	4.0	59	.2	1818	7.7	65	.2	4390	18.7
- L/Var.	-	-	-	-	-	-			150	150.0	50	50.0	-	-	-	-	200	200.0

TABLE X (Contd.)

Type of Establishment and Zone.	White Males	Ave.	White Females	Ave.	Col. M	Ave.	Col. F	Ave.	Ind. M	Ave.	Ind. F	Ave.	Bantu M	Ave.	Bantu F	Ave.	Total	Ave.
Rest of Municipal Area - P/S	26	.2	56	.5	-	-			120	1.1	-	-	-	-	8	-	210	1.9
- Conv.	229	.2	270	.3	79	-	158	.1	1212	1.4	192	.2	640	.7	103	.1	2883	3.5
- Dur.	835	3.4	202	.8	14	-	15	-	327	1.3	47	.1	773	3.1	7	-	2220	9.1
- L/Var.	10	1.3	129	16.5			1	.1	8	1.1	1	.1	60	7.8	2	.3	211	26.4
Outside Municipal Area - P/S	26	.7	47	1.2			-	-	15	.4	-	-	10	.2	31	.8	129	3.5
- Conv.	224	.8	308	1.1			10	-	513	1.9	20	-	661	2.4	30	.1	1766	6.6
- Dur.	242	1.7	216	1.5	23	.1	7	-	102	.7	-	-	547	3.8	-	-	1137	8.0
- L/Var.	22	1.3	313	19.2			2	.1	12	.7	-	-	207	12.7	4	.2	560	35.0
Total C.B.D. (P/S)	289	.7	1562	3.9	-		-		800	2.0	64	.2	86	.2	104	.3	2905	7.3
Total Outside C.B.D. (P/S)	146	.6	298	1.3	5	-	5	-	237	1.1	10	-	207	.9	53	.2	961	4.3
Total C.B.D. (Retail)	3730	2.4	5345	3.4	61	-	292	.2	4755	3.0	388	.2	4627	2.9	357	.2	19555	12.5
Total Outside C.B.D. (Retail)	2900	1.3	2366	1.1	259	.1	277	.1	3690	1.7	443	.2	5326	2.5	279	.1	15540	7.2

TABLE XI

Percentage of Firms which had already been established by particular Financial Years according to type of Firm within Major Ecological Zones.

Financial Year at which Firms were already established.	Type of Firm within Major Ecological Zones.																
	Hard Core - Personal Service	Hard Core - Convenience	Hard Core - Large Durables	Hard Core - Small Durables	Hard Core - Large Variety	Grey Street - Personal Service	Grey Street - Convenience	Grey Street - Durable	Rest of C.B.D. - Personal Service	Rest of C.B.D. - Convenience	Rest of C.B.D. - Large Durables	Rest of C.B.D. - Small Durables	Outside C.B.D. - Personal Service	Outside C.B.D. - Convenience	Outside C.B.D. - Durables	Outside C.B.D. - Large Variety	Total (All Firms)
1951/52	41.2	Nil	53.3	30.4	100.0	25.0	17.3	34.8	29.6	20.0	46.7	30.3	49.6	25.2	24.9	25.0	29.9
1958/59	47.1	14.3	60.0	60.9	100.0	41.7	34.6	61.7	55.5	45.0	60.0	68.3	61.2	39.2	50.3	35.0	48.6
1960/61	53.0	14.3	73.3	73.9	100.0	58.3	43.3	68.4	55.5	45.0	73.3	68.3	65.6	47.9	58.6	62.5	56.3
1962/63	88.2	85.7	80.0	82.6	100.0	66.7	60.6	86.6	55.5	55.0	86.7	68.3	70.1	62.6	72.5	62.5	69.3
1964/65	88.2	85.7	100.0	95.7	100.0	100.0	91.3	93.3	100.0	85.0	86.7	100.0	86.2	79.6	94.6	83.3	87.5
1966	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

NOTE: This data excludes markets and planned centres, which are however included in the total for all firms in all areas.

TABLE XII

Percentage distribution of Firms in terms of value of Sales/Services for 1965/66 according to type of Establishment within Major Ecological Zones.

Value of Sales and Services in groups for the financial year 1965/66.	Type of Establishment within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
0 - 999		12.0						16.7		
1000 - 2499		24.0	17.6					33.3		6.7
2500 - 4999		12.0				4.5		33.3	17.3	
5000 - 7499	33.3	4.0	11.8		5.9	4.5		8.3		
7500 - 9999		8.0							8.7	
10000 - 19999		8.0	5.9	14.3				8.3	26.0	20.2
20000 - 29999		16.0	11.8	28.6		4.5				33.6
30000 - 39999		4.0	5.9	14.3		9.1				9.1
40000 - 49999			5.9			13.6			4.7	13.4
50000 - 74999	33.3		11.8	14.3		13.6				6.7
75000 - 99999										
100000 - 124999					5.9	4.5				2.3
125000 - 149999					17.7	4.5				
150000 - 174999					5.9	4.5			8.7	
175000 - 199999										
200000 - 249999		8.0			11.8	4.5				
250000 - 299999										
300000 - 349999						4.5				
350000 - 399999					5.9	4.5				
400000 - 449999					5.9					
450000 - 499999										
500000 - 599999							14.3			1.3
600000 - 699999					5.9					
700000 - 799999										
800000 - 899999										
900000 - 999999										
1000000 and above							85.7			
No information	33.3	4.0	29.4	28.6	35.0	22.7			34.6	6.7
Total	100	100	100	100	100	100	100	100	100	100
No. of Cases	21	170	148	76	93	233	14	182	228	438
Mean	34375	27535	24044	32545	235205	102846	2370600	3670	32970	37171

Hard Core - All Durables = 140605

TABLE XII (Contd.)

Value of Sales and Services in groups for the financial year 1965/66.	Type of Establishment within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo/Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
0 - 999	22.7								
1000 - 2499	17.1			6.0		6.4		4.2	
2500 - 4999			6.4	16.7		25.5			
5000 - 7499	25.9		6.4				2.8	2.4	
7500 - 9999		4.8		6.0			7.2		
10000 - 19999	13.0	4.8		12.1		18.3	16.2	12.6	
20000 - 29999	13.0			12.1			3.9	11.4	
30000 - 39999		9.6		18.1			9.2	8.5	
40000 - 49999		24.1	6.4				14.9		
50000 - 74999				6.0			14.9	11.4	
75000 - 99999		9.6		6.0			2.4	1.2	
100000 - 124999							2.4		
125000 - 149999			6.4				1.5		
150000 - 174999								3.0	
175000 - 199999		4.8							
200000 - 249999			6.4			6.0	3.3	9.7	
250000 - 299999			6.4						
300000 - 349999								4.2	
350000 - 399999		4.8							
400000 - 449999			6.4						
450000 - 499999			6.4						
500000 - 599999					100.0				
600000 - 699999									
700000 - 799999									
800000 - 899999									
900000 - 999999			6.4						
1000000 and above			12.9					3.0	100.0
No information	8.3	37.4	29.1	16.9		43.8	21.2	28.3	
Total	100	100	100	100	100	100	100	100	100
No. of Cases	67	224	85	176	3	79	427	235	1
Mean	7873	81023	771739	25789	500000	30753	47866	79658	1043365

Rest of C.B.D.

All Durables = 268,722

TABLE XII (Contd.)

Value of Sales and Services in groups for the financial year 1965/66.	Type of Establishment within Major Ecological Zones.								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
0 - 999	13.8	5.9							2.8
1000 - 2499	27.5	5.9	9.4				11.1		6.9
2500 - 4999	9.5	5.9	6.4		42.9	3.8	7.5		6.5
5000 - 7499		11.8	3.0				5.5		4.7
7500 - 9999	7.3		3.0		14.3				2.3
10000 - 19999		13.1	15.4		42.9	7.7	18.6		12.3
20000 - 29999		14.4	18.9			15.3	16.6		11.6
30000 - 39999		12.2	7.6			11.5	5.5		7.9
40000 - 49999		2.5	14.0			3.8			6.6
50000 - 74999		8.4	12.0			3.8	5.5		6.9
75000 - 99999		2.5				3.8	5.5		1.9
100000 - 124999									.8
125000 - 149999			3.0			3.8			1.2
150000 - 174999		1.3	3.0						1.3
175000 - 199999						7.7	5.5		.9
200000 - 249999		1.3				7.7			2.5
250000 - 299999				35.9					.3
300000 - 349999									.5
350000 - 399999				16.7					.6
400000 - 449999									.2
450000 - 499999				16.7				25.0	.4
500000 - 599999									.2
600000 - 699999								25.0	.2
700000 - 799999				15.4			5.5		.2
800000 - 899999									-
900000 - 999999									.1
1000000 and above								25.0	.5
No information	41.8	14.7	4.1	15.4		31.0	13.0	25.0	19.7
Total	100	100	100	100	100	100	100	100	100
No. of Cases	109	814	244	8	37	269	143	8	4528
Mean	2643	28701	34775	402672	9295	77545	79849	760000	59559

TABLE XIII

Percentage distribution of Firms in terms of Ethnic Composition of Customers according to detailed Geographic Location of Firm.

Ethnic Composition of Customers.	Detailed Location of Firm.					
	Central Business District					
	Hard Core	Grey Street	Beach	Albert Park	Winder St. South	Winder St. North
Exclusively/Near Exclusively White	37.5	5.8	46.1	46.9	14.8	25.0
Majority White, Substantial Indian and Coloured, Few Bantu	7.6	.7		15.0		11.8
Maj. White, equal and Subst. Ind., Col./Bantu	39.9	.7	28.4	7.7	9.8	22.3
Maj. White, subst. Ind. and Col./Bantu	2.9			15.0		5.9
Maj. White, subst. Bantu, Few Ind. and Col.	4.7		25.5	15.3	19.4	11.7
Equal Whites/Ind. and Col.						
Equal Whites, Ind. and Col./Bantu						2.0
Equal Whites and Bantu						3.9
Maj. Ind. and Col., subst. Whites, few Bantu	.4	1.2				
Maj. Ind. and Col., subst. Whites/Bantu	1.3	3.9				
Maj. Ind. and Col., few White/Bantu		6.9				
Maj. Ind. and Col., subst. Bantu, few Whites		14.5			9.6	
Exclusively Ind. and Col.		4.5				
Maj. Ind. and Col., few Bantu		4.1				
Maj. Ind. and Col., subst. Bantu		4.6				
Equal Ind. and Col./Bantu		6.7				
Maj. Bantu, subst. Whites/Col. and Ind.	1.9	2.0			19.6	3.9
Maj. Bantu, subst. Whites, few Ind. and Col.	1.0	.7				7.8
Maj. Bantu, few Whites/Ind. and Col.	1.9	13.0				
Maj. Bantu, subst. Ind and Col. few Whites		28.8			26.7	5.5
Exclusively Bantu		1.9				
No information	1.0					
Total	100	100	100	100	100	100
No. of Cases	564	1018	106	72	110	268

NOTE: Substantial = 15% or more - Few = Less than 15%.

TABLE XIII (Contd.)

Ethnic Composition of Customers.	Detailed Location of Firm.						
	Warwick/ Berea/ Umbilo/ Old Borough	Cent. Lower	Cent. Upper	North. Lower	North. Upper	West.	South.
Exclusively/Near Exclusively White	15.1	15.2	37.1	21.9	46.9	7.6	3.2
Majority White, Substantial Indian and Coloured, Few Bantu	5.1	1.9			10.7		2.3
Maj. White, equal and subst. Ind., Col./Bantu	31.3	19.9	19.7		19.2	13.1	3.6
Maj. White, subst. Ind. and Col./Bantu		7.4				3.5	
Maj. White, subst. Bantu, few Ind. and Col.	2.4	23.3	24.6		7.6		10.3
Equal Whites/Ind. and Col.	5.1	2.4					
Equal Whites, Ind. and Col./Bantu							2.5
Equal Whites and Bantu	5.1	2.9	7.0				3.2
Maj. Ind. and Col., subst. Whites, few Bantu		3.4		10.3			
Maj. Ind. and Col., subst. Whites/Bantu		2.9					
Maj. Ind. and Col., few White/Bantu						38.3	15.1
Maj. Ind. and Col., subst. Bantu, few Whites		3.4		67.8		5.4	20.0
Exclusviely Ind. and Col.		2.4				21.6	9.9
Maj. Ind. and Col., few Bantu	5.2	4.6			15.6		10.0
Maj. Ind. and Col., subst. Bantu		6.6				5.4	
Equal Ind. and Col./Bantu	2.6						1.6
Maj. Bantu, subst. Whites/Col. and Ind.	10.3	3.4	3.4			5.1	1.6
Maj. Bantu, subst. Whites, few Ind. and Col.			8.2				1.6
Maj. Bantu, few Whites/Ind. and Col.							7.5
Maj. Bantu, subst. Ind. and Col. few Whites	17.7						
Exclusively Bantu							7.5
No information							
Total	100	100	100	100	100	100	100
No. of Cases	193	411	158	71	96	346	661

TABLE XIII (Contd.)

Ethnic Composition of Customers.	Detailed Location of Firm.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga etc.	
Exclusively/Near Exclusively White	12.7	22.8	5.6	66.7	16.6	48.8	17.7
Majority White, Substantial Indian and Coloured, Few Bantu	12.5		6.1				3.9
Maj. White, equal and subst. Ind., Col./Bantu	21.3	4.6	24.4		9.9	17.7	14.6
Maj. White, subst. Ind. and Col./Bantu	9.6	16.7	6.1				2.8
Maj. White, subst. Bantu, few Ind. and Col.	12.5	18.0	15.6	33.3		11.8	8.9
Equal Whites/Ind. and Col.	12.5						.7
Equal Whites, Ind. and Col./Bantu			6.1				.6
Equal Whites and Bantu						21.7	1.6
Maj. Ind. and Col., subst. Whites, few Bantu							.8
Maj. Ind. and Col., subst. Whites/Bantu							1.3
Maj. Ind. and Col., few White/Bantu		6.0					6.3
Maj. Ind. and Col., subst. Bantu, few Whites							8.0
Exclusively Ind. and Col.					60.5		5.1
Maj. Ind. and Col., few Bantu		3.1					3.4
Maj. Ind. and Col., subst. Bantu	19.0	6.0			13.0		2.7
Equal Ind. and Col./Bantu		6.0	8.0				2.3
Maj. Bantu, subst. Whites/Col. and Ind.		6.0	20.2				3.6
Maj. Bantu, subst. Whites, few Ind. and Col.							1.2
Maj. Bantu, few Whites/Ind. and Col.		10.6					4.6
Maj. Bantu, subst. Ind. and Col. few Whites			8.0				8.6
Exclusively Bantu							1.5
No information							.1
Total	100	100	100	100	100	100	100
No. of Cases	36	171	130	31	42	48	4528

TABLE XIV

Percentage Distribution of Firms according to date of Establishment at present site by Type of Firm within Major Ecological Zones.

Year of Establishment at Present Site.	Type of Firm within Major Zones.								
	Hard Core - P/S	Hard Core - Conv.	Hard Core - S/Dur.	Hard Core - L/Dur.	Hard Core - L/Var.	Grey St. - P/S	Grey St. - Conv.	Grey St. - Dur.	Rest C.B.D. - P/S
1966	17.6	14.3	-	-		-	17.3	6.7	
1964/5	23.5	-	13.0	33.3		33.3	22.1	6.7	59.3
1962/3	23.5	71.4	21.7	20.0		8.3	17.3	18.1	
1960/1	11.8	-	8.7	20.0		25.0	8.7	6.7	
1958/9	5.9	-	17.4			8.3	8.7	13.4	
1957		14.3	-			8.3	8.7	-	
1955/6			-					13.4	
1953/4			8.7						25.9
1951/2			-						
1950	5.9		-						
1945/9	5.9		8.7	13.3		8.3		21.4	
1940/4			-	6.7		-		6.7	14.8
1935/9			4.3	-		8.3	17.3	-	
1930/4	5.9		4.3	6.7	28.6			6.7	
Before 1930			8.7		71.4				
No Inf.			4.3						
Total	100	100	100	100	100	100	100	100	100
Base	148	76	233	93	14	182	228	438	56

NOTE: Due to rounding of percentages the base figures summed do not always correspond to the grand total exactly.

TABLE XIV (Contd.)

Year of Establishment at present Site.	Type of Firm within Major Zones.								
	Rest C.B.D. - Conv.	Rest C.B.D. - S/Dur.	Rest C.B.D. - L/Dur.	W/B/U/Central - P/S	W/B/U/Central - Conv.	W/B/U/Central - Dur.	W/B/U/Central - L/Var.	Rest Mun. - P/S	Rest Mun. - Conv.
1966	15.0		6.7	25.1	14.0	-		9.8	21.6
1964/5	35.0	31.7	13.3	12.7	13.2	28.1		14.7	9.7
1962/3	10.0	-	13.3	6.0	17.2	8.4		-	15.7
1960/1	-	6.3	20.0	12.4	7.4	8.4		-	7.2
1958/9	10.0	12.7	6.7	12.7	7.4	8.4		-	7.2
1957	5.0	-	6.7	-	-	-		14.1	2.5
1955/6	5.0	25.4	6.7	-	11.6	9.9		-	-
1953/4			-	6.4	-	-		4.9	8.5
1951/2	-		6.7	6.4	-	4.9		-	1.3
1950	-		-	-	-	5.0		-	-
1945/9	5.0	23.9	-	6.0	8.5	9.9		14.1	14.4
1940/4	5.0		-	-	-	-		14.1	-
1935/9	5.0		13.3	-	-	5.0		28.3	-
1930/4	5.0		-	6.0	11.6	8.5			5.9
Before 1930			6.7	-	9.1	3.5	100		5.9
No Inf.				6.4					
Total	100	100	100	100	100	100	100	100	100
Base	218	167	83	79	418	201	1	106	811

TABLE XIV (Contd.)

Year of Establishment at present Site.	Type of Firm within Major Zones.								
	Rest Mun. - Dur.	Rest Mun. - L/Var.	Outside M.A. - P/S	Outside M.A. - Conv.	Outside M.A. - Dur.	Outside M.A. - L/Var.	Planned Centres	Markets	All Establishments
1966	3.1	-	14.3	27.0	17.6	33.3	56.4	3.6	12.9
1964/5	16.0	50.0	28.6	27.0	23.5	33.3	28.2	3.6	18.1
1962/3	23.1	-	14.3	7.7	17.6	-	7.7	3.6	14.7
1960/1	6.2	26.0	-	11.5	11.8	33.3	2.6	7.1	8.2
1958/9	3.1	24.0	14.3	7.7	5.9		5.1	3.6	8.0
1957	3.1		-	-	5.9			3.6	2.6
1955/6	12.9		14.3	3.8	5.9			3.6	5.4
1953/4	6.2				5.9			7.2	3.3
1951/2	9.8							-	1.2
1950	3.1							7.1	.9
1945/9	6.7							14.3	9.6
1940/4	-							10.7	2.0
1935/9	-			3.8				7.1	3.3
1930/4	-			-				3.6	4.3
Before 1930	6.7		14.3	11.5				17.8	4.8
No Inf.					5.9			3.6	.7
Total	100	100	100	100	100	100	100	100	100
Base	235	5	37	258	135	8	109	191	4528

TABLE XV

Estimated Percentage increases in Employment in all Retail Outlets in the Durban Municipal Area given according to Race and Sex of Employees and Major Ecological Zones.

Race and Sex	Central Business District			Warwick/Berea/Umbilo/ Old Borough Area			Rest of Municipal Area			Total Municipal Area		
	Census 1960/1	Survey Est. 1966	% Inc.	Census 1960/1	Survey Est. 1966	% Inc.	Census 1960/1	Survey Est. 1966	% Inc.	Census 1960/1	Survey Est. 1966	% Inc.
White Males	1273	2044	61	406	884	118	177	1020	476	1856	3948	113
White Females	3280	4828	47	544	733	35	353	554	57	4177	6115	46
Coloured M	53	2	-	14	64	357	11	79	500+	78	145	85
Coloured F	46	233	407	31	84	171	5	174	500+	82	491	499
Indian M	1499	3109	107	858	1074	25	745	1518	104	3102	5701	84
Indian F	65	347	434	45	133	196	21	240	500	131	720	450
Bantu M	2017	2748	36	1496	1439	4% dec.	1059	1159	9	4572	5346	17
Bantu F	121	314	160	39	123	215	25	112	348	185	549	197
Total	8354	13625	63	3433	4534	32	2396	4856	103	14183	23015	62

TABLE XVI

Comparisons between Estimates of Current Total Employment[1] as well as Mean Number of Workers per Retail Firm, and Employment Data obtained from the Results of the 1960/61 Census of Distribution, according to Type of Outlet within Major Ecological Zones in the Durban Municipal Area.

Type of Outlet within Major Ecological Zones.	White Males	Mean	Coloured Males	Mean	Indian Males	Mean	Bantu Males	Mean	Total Males	Mean
Central Business District										
Conv. - 1966 Survey	356	.83	-	-	424	.99	489	1.14	1269	2.95
- 1960/1 Census	153	.43	6	.02	430	1.20	565	1.58	1154	3.23
Dur. - 1966 Survey	1286	1.25	-	-	2461	2.40	1349	1.32	5096	4.97
- 1960/1 Census	745	1.30	27	.05	950	1.66	1012	1.77	2734	4.79
L/Var.[2] - 1966 Survey	402	28.7	2	.1	224	16.0	910	65.0	1538	109.9
- 1960/1 Census	375	41.7	20	2.2	119	13.2	440	48.9	954	106.0
Warwick/Berea/Umbilo/Old Borough										
Conv. - 1966 Survey	366	.86	44	.10	424	1.0	620	1.45	1454	3.41
- 1960/1 Census	275	.46	9	.01	591	.98	1246	2.07	2121	3.52
Dur. - 1966 Survey	518	2.20	20	.09	650	2.77	819	3.49	2007	8.54
- 1960/1 Census	131	.75	5	.03	267	1.53	250	1.44	653	3.75
Rest of Municipal Area										
Conv. - 1966 Survey	219	.27	79	.10	1212	1.51	640	.80	2150	2.67
- 1960/1 Census	150	.23	11	.02	513	.78	939	1.44	1613	2.47
Dur. - 1966 Survey	791	3.82	-	-	298	1.44	459	2.21	1548	7.48
- 1960/1 Census	14	.12	-	-	210	1.84	97	.85	321	2.82
L/Var. - 1966 Survey	10	1.25	-	-	8	1.00	60	7.50	78	9.75
- 1960/1 Census	13	6.5	-	-	22	11.0	23	11.5	58	29.00

1] Survey results are adjusted to conform with the type of firms included in the Census.

2] Excludes very recent smaller Branches at Beachfront.

TABLE XVI (Contd.)

Type of Outlet within Major Ecological Zones.	White Females	Mean	Coloured Females
<u>Central Business District</u>			
Conv. - 1966 Survey	345	.80	10
- 1960/1 Census	255	.71	14
Dur. - 1966 Survey	1680	1.64	73
- 1960/1 Census	1508	2.64	26
L/Var. - 1966 Survey	2808	200.5	150
- 1960/1 Census	1517	168.5	6
<u>Warwick/Berea/Umbilo/Old Borough</u>			
Conv. - 1966 Survey	505	1.18	72
- 1960/1 Census	350	.58	16
Dur. - 1966 Survey	228	.97	12
- 1960/1 Census	194	1.11	15
<u>Rest of Municipal Area</u>			
Conv. - 1966 Survey	260	.32	158
- 1960/1 Census	292	.45	5
Dur. - 1966 Survey	165	.80	15
- 1960/1 Census	31	.27	-
L/Var. - 1966 Survey	129	16.13	1
- 1960/1 Census	30	15.0	-

Mean	Indian Females	Mean	Bantu Females	Mean	Total Females	Mean
.02	138	.32	199	.46	692	1.61
.04	30	.08	41	.11	340	.95
.07	209	.20	97	.09	2059	2.01
.05	20	.04	61	.11	1615	2.83
10.7	-	-	18	1.3	2976	212.6
.7	15	1.7	19	2.1	1557	173.0
.17	74	.17	68	.16	719	1.68
.03	23	.04	5	.01	394	.65
.05	59	.25	55	.23	354	1.51
.09	22	.13	34	.20	265	1.52
.20	192	.24	103	.13	713	.89
.01	18	.03	21	.03	336	.51
.07	47	.23	7	.03	234	1.13
-	3	.03	4	.04	38	.33
.125	1	.125	2	.25	133	16.63
-	-	-	-	-	30	15.00

TABLE XVII

Average Employment in Personal Services as well as Retail Firms outside the Municipal Area in 1966 and in 1960 calculated from the Results of the Present Survey.

Area and Type of Firm	Mean - White Males	Mean - White Females	Mean - Indian Males	Mean - Indian Females	Mean - Bantu Males	Mean - Bantu Females
Personal Services						
Hard Core - 1966	1.6	9.7	1.8		.5	.5
- 1960	1.3	2.6	2.0		.5	
Grey Street - 1966			2.8	.1		
- 1960			2.7	.1		
Rest of C.B.D. - 1966	.6	1.7	.2	.5	.1	.3
- 1960	.5	.2	.6		.3	
Warwick/Berea/Umbilo/Old Borough - 1966	1.2	2.4	1.3	.1	2.5	.1
- 1960	1.9	2.9	1.8		4.0	.2
Rest of Municipal Area - 1966	.2	.5	1.1			
- 1960		.2	1.3			.2
Outside Municipal Area - 1966	.7	1.2	.4		.2	.8
- 1960	.3	1.3	.3		.6	.3
Retail Outlets Outside Municipal Area						
Convenience - 1966	.8	1.1	1.9	.1	2.4	.1
- 1960	.5	1.6	2.5	.1	2.5	
Durables - 1966	1.7	1.5	.7		3.8	
- 1960	1.3	1.3	1.6		3.8	

<u>TABLE XVIII</u>

Total Square Footage of Firms in the same Area as at Present During 1964/65
<u>as a Percentage of Present Total Floorspace according to Detailed Location of Establishment.</u>

1964/65 Sq. Ft. as % of Present.	Detailed Location of Establishment.					
	Central Business District					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Under 20%						
20 - 29						
30 - 39						
40 - 49	2.9					
50 - 59		1.5				
60 - 69	1.5					
70 - 74						
75 - 79						
80 - 84	1.9					
85 - 89						2.0
90 - 94		1.9				
95 - 99						
100	86.8	91.0	70.9	100.0	95.0	80.2
100 - 109			2.6		5.0	2.0
110 - 124						
124 - 149						
150% +						
Did not exist	6.7	4.9	26.5			15.8
No information		.7				
Total	100	100	100	100	100	100

TABLE XVIII (Contd.)

1964/65 Sq. Ft. as % of Present.	Detailed Location of Establishment.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Under 20%							1.1
20 - 29							
30 - 39							
40 - 49							1.6
50 - 59							
60 - 69							
70 - 74							
75 - 79					3.3		
80 - 84							3.2
85 - 89							
90 - 94		3.6				3.5	
95 - 99							
100	91.2	83.2	68.2	92.7	78.9	80.0	76.1
100 - 109							
110 - 124							
124 - 149							
150% +		2.5					
Did not exist	5.2	10.7	31.8		17.9	16.5	17.9
No information	3.6			7.3			
Total	100	100	100	100	100	100	100

TABLE XVIII (Contd.)

1964/65 Sq. Ft. as % of Present.	Detailed Location of Establishment.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga	
Under 20%							.2
20 - 29							
30 - 39							
40 - 49							.6
50 - 59		12.0					.8
60 - 69							.2
70 - 74							
75 - 79							.1
80 - 84							.7
85 - 89							.1
90 - 94							1.0
95 - 99							
100	78.0	48.6	92.0	100.0	83.4	44.6	82.6
100 - 109							.3
110 - 124							
124 - 149							
150% +							.2
Did not exist	12.5	39.3	8.0		16.6	55.4	12.5
No information	9.6						.6
Total	100	100	100	100	100	100	100

TABLE XIX

Total Square Footage of Firms in the same Area as at Present During 1962/63 as a Percentage of Present Total Floorspace according to Detailed Location of Establishment.

1962/63 Sq. Ft. as % of Present.	Detailed Location of Establishment.					
	Central Business District					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Under 20%						
20 - 29		1.9				
30 - 39						
40 - 49	4.4					2.0
50 - 59						
60 - 69	2.9					
70 - 74						
75 - 79	1.9					
80 - 84	1.9					
85 - 89						2.0
90 - 94					5.0	
95 - 99	.4					
100	62.9	76.7	40.6	57.8	75.4	51.2
100 - 109			2.6			
110 - 124				15.0		
124 - 149						
150% +	1.5					
Did not exist	20.1	20.7	56.7	15.0	19.6	44.8
No information	4.0	.7		12.1		
Total	100	100	100	100	100	100

TABLE XIX (Contd.)

1962/63 Sq. Ft. as % of Present.	Detailed Location of Establishment.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Under 20%							1.1
20 - 29	5.1						
30 - 39		2.9			12.0		
40 - 49							1.6
50 - 59							
60 - 69							
70 - 74							2.5
75 - 79							
80 - 84		2.5					1.6
85 - 89							
90 - 94		2.5					
95 - 99							
100	54.1	63.9	48.3	24.8	32.2	74.6	62.0
100 - 109							
110 - 124							
124 - 149							
150% +		2.5	1.9				
Did not exist	37.1	25.7	46.4	67.8	55.7	25.4	31.2
No information	3.6		3.4	7.3			
Total	100	100	100	100	100	100	100

TABLE XIX (Contd.)

1962/63 Sq. Ft. as % of Present.	Detailed Location of Establishment.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga	
Under 20%							.2
20 - 29							.7
30 - 39							.5
40 - 49							.9
50 - 59		6.0					.2
60 - 69							.4
70 - 74							.3
75 - 79							.2
80 - 84							.7
85 - 89							.1
90 - 94			1.5				.4
95 - 99							.1
100	71.7	27.5	54.1	66.7	83.4	21.7	62.1
100 - 109							.1
110 - 124							.2
124 - 149							-
150% +							.5
Did not exist	18.8	63.4	44.4	33.3	16.6	78.3	30.7
No information	9.6	3.1					1.6
Total	100	100	100	100	100	100	100.0

TABLE XX

Total Square Footage of Firms in the same Area as at Present During 1960/61 as a Percentage of Present Total Floorspace according to Detailed Location of Establishment.

1960/61 Sq. Ft. as % of Present.	Detailed Location of Establishment.					
	Central Business District					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Under 20%						
20 - 29						
30 - 39	1.9					
40 - 49	1.0					2.0
50 - 59	5.5					5.9
60 - 69	3.6					
70 - 74		2.9				
75 - ·79						
80 - 84	1.9					
85 - 89						2.0
90 - 94	.4				5.0	
95 - 99						
100	40.3	61.1	30.4	42.5	75.4	41.4
100 - 109			2.6			
110 - 124				15.0		
124 - 149						
150% +						
Did not exist	40.2	33.6	66.9	30.4	19.6	48.7
No information	5.1	2.3		12.1		
Total	100	100	100	100	100	100

TABLE XX (Contd.)

1960/61 Sq. Ft. as % of Present.	Detailed Location of Establishment.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Under 20%							1.1
20 - 29	5.1						
30 - 39		2.9			10.7		
40 - 49							
50 - 59			1.9				
60 - 69					1.4		
70 - 74		2.4					2.5
75 - 79		2.5					
80 - 84		2.5					1.6
85 - 89							
90 - 94							
95 - 99							
100	39.3	53.2	44.5	24.8	24.5	62.2	41.7
100 - 109							
110 - 124							
124 - 149							
150% +							
Did not exist	52.0	36.5	50.1	67.8	63.4	37.8	53.1
No information	3.6		3.4	7.3			
Total	100	100	100	100	100	100	100

TABLE XX (Contd.)

1960/61 Sq. Ft. as % of Present.	Detailed Location of Establishment.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga	
Under 20%							.2
20 - 29							.2
30 - 39							.7
40 - 49							.2
50 - 59							1.1
60 - 69							.5
70 - 74							1.2
75 - 79			8.0				.5
80 - 84							.7
85 - 89							.1
90 - 94			1.5				.2
95 - 99							
100	52.7	13.8	33.9	66.7	83.4	21.7	47.8
100 - 109							.1
110 - 124							.2
124 - 149							
150% +							
Did not exist	18.8	83.2	56.6	33.3	16.6	78.3	43.8
No information	28.6	3.1					2.4
Total	100	100	100	100	100	100	100

TABLE XXI

Total Square Footage of Firms in the same Area as at Present During 1958/59
as a Percentage of Present Total Floorspace According to Detailed Location of Establishment.

1958/59 Sq. Ft. as % of Present.	Detailed Location of Establishment.					
		Central Business District				
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Under 20%						
20 - 29						3.9
30 - 39	1.9					2.0
40 - 49						
50 - 59	5.4					
60 - 69	2.0					
70 - 74	1.4	2.9				
75 - 79						
80 - 84	1.9					
85 - 89						2.0
90 - 94	.4				5.0	
95 - 99			2.6			
100	31.2	52.6	30.4	37.7	75.4	34.9
100 - 109						
110 - 124	1.6			16.3		
124 - 149						2.0
150% +						
Did not exist	49.1	42.2	66.9	32.9	19.6	55.2
No information	5.1	2.3		13.1		
Total	100	100	100	100	100	100

TABLE XXI (Contd.)

1958/59 Sq. Ft. as % of Present.	Detailed Location of Establishment.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Under 20%							1.1
20 - 29	5.1						
30 - 39		2.9	1.9				
40 - 49							
50 - 59		2.4					
60 - 69	5.1						
70 - 74							2.5
75 - 79		2.5					
80 - 84		2.5					1.6
85 - 89							
90 - 94							
95 - 99							
100	26.5	46.5	32.3	24.8	24.5	59.7	33.0
100 - 109							
110 - 124							
124 - 149							
150% +							
Did not exist	59.6	43.2	62.4	67.8	75.5	40.3	61.7
No information	3.6		3.4	7.3			
Total	100	100	100	100	100	100	100

TABLE XXI (Contd.)

1958/59 Sq. Ft. as % of Present.	Detailed Location of Establishment.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga	
Under 20%							.2
20 - 29							.5
30 - 39							.7
40 - 49							
50 - 59							.9
60 - 69							.5
70 - 74							1.1
75 - 79							.2
80 - 84							.7
85 - 89							.1
90 - 94			1.5				.2
95 - 99							.1
100	40.2	13.7	20.2	33.3	70.4		40.2
100 - 109							
110 - 124							.4
124 - 149							.1
150% +							
Did not exist	31.2	83.2	78.3	33.3	29.6	100	51.6
No information	28.6	3.1		33.3			2.6
Total	100	100	100	100	100	100	100

TABLE XXII

Total Square Footage of Firms in the same Area as at Present During 1951/52 as a Percentage of Present Total Floorspace According to Detailed Location of Establishment.

1951/52 Sq. Ft. as % of Present.	Detailed Location of Establishment.					
	Central Business District					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Under 20%						
20 - 29						3.9
30 - 39	.4					2.0
40 - 49	1.0					
50 - 59	4.4					
60 - 69	1.3					
70 - 74	.4	2.9			5.0	
75 - 79	1.5					
80 - 84	2.2					
85 - 89						2.0
90 - 94						
95 - 99						
100	16.1	32.0		13.1	46.3	13.7
100 - 109						
110 - 124						
125 - 149						2.0
150% +	1.9					
Did not exist	65.8	62.7	100	73.7	48.7	74.4
No information	5.0	2.3		13.1		2.0
Total	100	100	100	100	100	100

TABLE XXII (Contd.)

1951/52 Sq. Ft. as % of Present.	Detailed Location of Establishment.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Under 20%							
20 - 29	5.1						
30 - 39	2.4						
40 - 49							
50 - 59		4.0					
60 - 69	5.1						
70 - 74							
75 - 79							
80 - 84							
85 - 89							
90 - 94							
95 - 99							
100	2.4	27.0	23.4		15.6	57.2	25.1
100 - 109							
110 - 124							
125 - 149							
150% +							
Did not exist	81.2	67.8	73.2	100	84.4	42.8	75.0
No information	3.6	1.2	3.4				
Total	100	100	100	100	100	100	100

TABLE XXII (Contd.)

1951/52 Sq. Ft. as % of Present.	Detailed Location of Establishment.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga	
Under 20%							.2
20 - 29							.5
30 - 39							.3
40 - 49							.1
50 - 59							.9
60 - 69							.4
70 - 74							.8
75 - 79							.2
80 - 84							.3
85 - 89							.1
90 - 94			1.5				-
95 - 99							-
100	12.5	9.1	8.0				23.0
100 - 109							-
110 - 124							-
125 - 149							.1
150% +							.2
Did not exist	59.0	87.8	90.5	66.7	100	100	70.2
No information	28.6	3.1		33.3			2.7
Total	100	100	100	100	100	100	100

TABLE XXIII

Percentage Distribution of Firms which have always been located in the same area in terms of total square footage during 1964/65 as a proportion of present total floorspace according to Type of Outlet within Major Ecological Zones.

Proportions of Present Total Floorspace.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Under 20%										
20 - 29										
30 - 39										
40 - 49						4.5				
50 - 59								8.3		
60 - 69			5.9		6.7					
70 - 74										
75 - 79										
80 - 84						4.5				
85 - 89										
90 - 94									8.7	
95 - 99										
100%	66.7	96.0	82.4	83.3	93.3	86.4	100.0	91.7	82.7	93.0
100 - 109										
110 - 124										
125 - 149										
150% +										
Firm not in existence			11.8	16.7		4.5			8.7	7.0
No information	33.3	4.0								
Total	100	100	100	100	100	100	100	100	100	100

TABLE XXIII (Contd.)

Proportion of Present Total Floorspace.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo/ Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 20%									
20 - 29									
30 - 39									
40 - 49									
50 - 59									
60 - 69									
70 - 74									
75 - 79									
80 - 84									
85 - 89			6.7						
90 - 94						5.9	2.7		
95 - 99									
100%	83.1	79.9	66.7	94.9		75.2	75.8	93.2	100.0
100 - 109	5.6		13.3						
110 - 124									
125 - 149									
150% +							2.7		
Firm not in existence	11.3	20.1	13.3	5.1	100.0	18.9	18.8	6.8	
No information									
Total	100	100	100	100	100	100	100	100	100

TABLE XXIII(Contd.)

Proportion of Present Total Floorspace.	Type of Firm within Major Ecological Zones.							
	Rest of Durban Municipal Area				Outside Durban Municipal Area			
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 20%			3.3					
20 - 29								
30 - 39								
40 - 49		1.3						
50 - 59						8.0		
60 - 69								
70 - 74								
75 - 79	2.6							
80 - 84		2.6						
85 - 89								
90 - 94		1.3						
95 - 99								
100%	83.1	75.0	93.4	64.1	85.7	60.9	75.4	51.9
100 - 109								
110 - 124								
125 - 149								
150% +								
Firm not in existence	9.5	19.9	3.3	35.9	14.3	31.2	24.6	48.2
No information	4.7							
Total	100	100	100	100	100	100	100	100

TABLE XXIV

Percentage Distribution of Firms which have always been located in the same area in terms of total square footage during 1962/63 as a proportion of present total floorspace according to Type of Outlet within Major Ecological Zones.

Proportions of Present Total Floorspace.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Under 20%										
20 - 29										
30 - 39									8.7	
40 - 49			5.9		6.7	4.3				
50 - 59										
60 - 69					6.7	4.3				
70 - 74										
75 - 79						4.3				
80 - 84						4.3				
85 - 89										
90 - 94										
95 - 99							14.3			
100%	33.3	96.0	47.1	83.3	60.0	65.2	85.7	66.7	52.0	86.1
100 - 109										
110 - 124										
125 - 149										
150% +			5.9							
Firm not in existence	33.3		29.4	16.7	20.0	17.4		33.3	39.4	13.9
No information	33.3	4.0	11.8		6.7					
Total	100	100	100	100	100	100	100	100	100	100

TABLE XXIV (Contd.)

Proportion of Present Total Floorspace.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo/ Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 20%									
20 - 29								4.8	
30 - 39							2.9		
40 - 49			6.7						
50 - 59									
60 - 69									
70 - 74									
75 - 79									
80 - 84							2.5		
85 - 89			6.7						
90 - 94			6.7				2.5		
95 - 99									
100%	48.1	50.0	66.7	68.3		55.7	60.0	60.0	100.0
100 - 109	5.6								
110 - 124		5.0							
125 - 149									
150% +							2.5		
Firm not in existence	46.3	45.0	13.3	31.7	100.0	37.9	29.6	35.2	
No information						6.4			
Total	100	100	100	100	100	100	100	100	100

TABLE XXIV (Contd.)

Proportion of Present Total Floorspace.	Type of Firm within Major Ecological Zones.							
	Rest of Durban Municipal Area				Outside Durban Municipal Area			
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 20%			3.3					
20 - 29								
30 - 39		1.3						
40 - 49		1.3						
50 - 59						3.8		
60 - 69								
70 - 74			7.1					
75 - 79								
80 - 84		1.3						
85 - 89								
90 - 94								25.9
95 - 99								
100%	71.8	58.9	73.8	32.1	42.9	42.3	53.1	25.9
100 - 109								
110 - 124								
125 - 149								
150% +								
Firm not in existence	22.0	37.2	15.8	67.9	42.9	53.8	46.9	48.2
No information	6.2				14.3			
Total	100	100	100	100	100	100	100	100

TABLE XXV

Percentage Distribution of Firms which have always been located in the same area in terms of total square footage during 1960/61 as a proportion of present total floorspace according to Type of Outlet within Major Ecological Zones.

Proportions of Present Total Floorspace.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Under 20%										
20 - 29										
30 - 39						4.3				
40 - 49					7.1					
50 - 59			5.9			8.7				
60 - 69			5.9		14.2					
70 - 74										7.0
75 - 79										
80 - 84						4.3				
85 - 89										
90 - 94							14.3			
95 - 99										
100	33.3	88.0	29.4		35.7	56.5	85.7	58.3	43.3	62.7
100 - 109										
110 - 124										
125 - 149										
150% +										
Firm not in existence	33.3	4.0	47.1	100.0	28.5	26.1		41.7	56.7	30.4
No information	33.3	8.0	11.8		14.4					
Total	100	100	100	100	100	100	100	100	100	100

TABLE XXV (Contd.)

Proportion of Present Total Floorspace.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo/ Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 20%									
20 - 29								4.8	
30 - 39							2.9		
40 - 49			6.7						
50 - 59			6.7	6.4				1.4	
60 - 69									
70 - 74								4.9	
75 - 79							2.5		
80 - 84							2.5		
85 - 89			6.7						
90 - 94			6.7						
95 - 99									
100	48.1	40.0	46.7	56.4		49.8	47.7	45.5	100.0
100 - 109	5.6								
110 - 124		5.0							
125 - 149									
150% +									
Firm not in existence	46.3	55.0	26.7	37.2	100.0	43.8	44.4	43.4	
No information						6.4			
Total	100	100	100	100	100	100	100	100	100

TABLE XXV (Contd.)

Proportion of Present Total Floorspace.	Type of Firm within Major Ecological Zones.							
	Rest of Durban Municipal Area				Outside Durban Municipal Area			
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 20%			3.3					
20 - 29								
30 - 39		1.3						
40 - 49								
50 - 59								
60 - 69				16.7				
70 - 74			7.1					
75 - 79						3.8		
80 - 84		1.3						
85 - 89								
90 - 94								25.9
95 - 99								
100	71.8	44.2	51.2	15.4	28.6	34.6	33.2	25.9
100 - 109								
110 - 124								
125 - 149								
150% +								
Firm not in existence	22.0	53.2	31.3	67.9	57.1	61.5	66.8	48.2
No information	6.2		7.1		14.3			
Total	100	100	100	100	100	100	100	100

TABLE XXVI

Percentage Distribution of Firms which have always been located in the same area in terms of total square footage during 1958/59 as a proportion of present total floorspace according to Type of Outlet within Major Ecological Zones.

Proportions of Present Total Floorspace.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Under 20%										
20 - 29										
30 - 39						4.3				
40 - 49										
50 - 59			5.9			8.7				
60 - 69					13.3					
70 - 74					6.7		14.3			7.0
75 - 79										
80 - 84						4.3				
85 - 89										
90 - 94							14.3			
95 - 99										
100	33.3	88.0	23.5		26.7	43.5	71.4	41.7	34.6	55.0
100 - 109										
110 - 124			5.9							
125 - 149										
150% +										
Firm not in existence	33.3	4.0	52.9	100.0	40.0	39.1		58.3	65.4	38.0
No information	33.3	8.0	11.8		13.3					
Total	100	100	100	100	100	100	100	100	100	100

TABLE XXVI (Contd.)

Proportion of Present Total Floorspace.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo/ Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 20%									
20 - 29				6.4				4.8	
30 - 39			6.7				2.9	1.4	
40 - 49									
50 - 59								4.9	
60 - 69								4.8	
70 - 74									
75 - 79							2.5		
80 - 84							2.5		
85 - 89			6.7						
90 - 94			6.7						
95 - 99									
100	48.1	40.0	26.7	56.4		37.4	40.4	38.4	100.0
100 - 109	5.6								
110 - 124		5.0							
125 - 149			6.7						
150% +									
Firm not in existence	46.3	55.0	46.7	37.2	100.0	56.2	51.7	45.7	
No information						6.4			
Total	100	100	100	100	100	100	100	100	100

TABLE XXVI (Contd.)

Proportion of Present Total Floorspace.	Type of Firm within Major Ecological Zones.							
	Rest of Durban Municipal Area				Outside Durban Municipal Area			
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 20%			3.3					
20 - 29								
30 - 39								
40 - 49								
50 - 59								
60 - 69								
70 - 74			7.1					
75 - 79								
80 - 84		1.3						
85 - 89								
90 - 94								25.9
95 - 99								
100	71.8	40.0	41.7	15.4	28.6	19.2	23.5	
100 - 109								
110 - 124								
125 - 149								
150% +								
Firm not in existence		58.7	40.8	84.6		76.9	70.6	74.1
No information			7.1			3.9	5.9	
Total	100	100	100	100	100	100	100	100

TABLE XXVII

Percentage Distribution of Firms which have always been located in the same area in terms of total square footage during 1951/52 as a proportion of present total floorspace according to Type of Outlet within Major Ecological Zones.

Proportions of Present Total Floorspace.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Under 20%										
20 - 29										
30 - 39							14.3			
40 - 49					6.7					
50 - 59			5.9		6.7	4.3				
60 - 69					6.7		14.3			
70 - 74							14.3			7.0
75 - 79			5.9							
80 - 84						4.3	14.3			
85 - 89										
90 - 94										
95 - 99										
100		68.0	17.6		20.0	17.4	42.9	25.0	17.3	27.9
100 - 109										
110 - 124										
125 - 149										
150% +						4.3				
Firm not in existence	66.7	24.0	58.8	100.0	46.7	69.6		75.0	82.7	65.2
No information	33.3	8.0	11.8		13.3					
Total	100	100	100	100	100	100	100	100	100	100

TABLE XXVII (Contd.)

Proportion of Present Total Floorspace.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo/ Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 20%									
20 - 29				6.4				4.8	
30 - 39						5.9			
40 - 49									
50 - 59							1.5	4.9	
60 - 69									
70 - 74			8.3						
75 - 79									
80 - 84									
85 - 89			8.3						
90 - 94									
95 - 99									
100	17.5	21.3		24.2		12.4	25.2	11.7	100.0
100 - 109									
110 - 124									
125 - 149			8.3						
150% +									
Firm not in existence	82.5	78.7	66.8	69.3	100.0	69.0	73.3	78.6	
No information			8.3			12.7			
Total	100	100	100	100	100	100	100	100	100

TABLE XXVII (Contd.)

Proportion of Present Total Floorspace.	Type of Firm within Major Ecological Zones.							
	Rest of Durban Municipal Area				Outside Durban Municipal Area			
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Under 20%						3.8		
20 - 29								
30 - 39								
40 - 49								
50 - 59								
60 - 69								
70 - 74								
75 - 79								
80 - 84								
85 - 89								
90 - 94								25.9
95 - 99								
100	71.8	28.2	24.7		14.3	7.7		
100 - 109								
110 - 124								
125 - 149								
150% +								
Firm not in existence	28.2	71.8	68.2	100.0	71.4	84.6	100.0	74.1
No information			7.1		14.3	3.8		
Total	100	100	100	100	100	100	100	100

TABLE XXVIII

Percentage Distribution of Firms in Terms of Sales/Service Area as a Percentage of Total Square Footage in 1964/65 according to Detailed Location of Establishment.

Sales/Service Area as % of Total Square Footage.	Detailed Geographical Location of Firm.					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Under 30%	6.0	6.0			5.0	11.7
30 - 39	2.5	1.5			9.8	2.0
40 - 49	9.8	12.5		15.3		11.1
50 - 59	13.0	9.5		42.2	9.8	5.9
60 - 69	12.7	13.0	20.0	30.4		19.3
70 - 79	8.2	2.6	23.1		19.4	11.7
80 - 89	11.1	14.3	10.2		19.4	14.1
90% +	9.8	10.7	20.2		36.5	8.3
100/same	21.6	22.5		12.1		
Cannot dist.						
Did not exist	5.0	6.8	26.5			13.8
No information	.4	.7				2.0
Total	100	100	100	100	100	100
Base	564	1018	106	72	110	268

TABLE XXVIII (Contd.)

Sales/Service Area as % of Total Square Footage.	Detailed Geographical Location of Firm.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Under 30%	17.9	12.5	1.9			6.0	8.7
30 - 39	2.4	9.3					
40 - 49	16.0	1.9	1.9	67.9	10.7		3.9
50 - 59	15.4	17.4	15.2		1.4	16.5	7.3
60 - 69		9.0	25.8	10.3	31.5	25.4	7.7
70 - 79		11.3	17.8	7.3	19.1		7.5
80 - 89	21.5	18.5	3.8	14.5	5.8	8.7	13.9
90% +	10.2	2.5	1.9			5.4	17.8
100/same	7.8	5.7			15.6	18.1	15.2
Cannot dist.							
Did not exist	5.2	11.8	31.8		15.9	20.0	17.9
No information	3.6						
Total	100	100	100	100	100	100	100
Base	193	411	158	71	96	346	661

TABLE XXVIII (Contd.)

Sales/Service Area as % of Total Square Footage	Detailed Geographical Location of Firm.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga	
Under 30%	8.8		8.0				6.9
30 - 39			2.2				2.0
40 - 49	12.5		20.2	66.7			8.9
50 - 59		12.0			60.5	5.9	11.6
60 - 69	24.9	4.6	18.3		9.9		13.1
70 - 79	6.3	28.9	15.6				8.1
80 - 89	19.0	6.0	6.1	33.3		11.2	12.8
90% +	6.4		6.1			21.7	9.5
100/same		9.1	16.3		13.0	5.9	13.5
Cannot dist.							
Did not exist	12.5	39.3	8.0		16.6	55.4	12.9
No information	9.6						.6
Total	100	100	100	100	100	100	100
Base	36	171	130	31	42	48	4528

TABLE XXIX

Percentage Distribution of Firms in Terms of Sales/Service Area as a Percentage of Total Square Footage in 1962/63 according to Detailed Location of Establishment.

Sales/Service Area as % of Total Square Footage.	Detailed Geographical Location of Firm.					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Under 30%	3.9	6.0			5.0	4.0
30 - 39	2.5	1.5			9.8	2.0
40 - 49	9.4	8.1		15.3		7.9
50 - 59	13.0	2.6		27.2	9.8	5.9
60 - 69	9.3	12.4		15.3		13.3
70 - 79	7.2	2.6	23.1	15.0	19.4	7.7
80 - 89	9.2	14.3	10.2		9.6	3.9
90% +	7.8	10.7	10.0		26.7	10.4
100/same	15.0	20.6				
Cannot dist.						
Did not exist	18.2	20.7	56.7	15.0	19.6	44.8
No information	4.4	.7		12.1		
Total	100	100	100	100	100	100
Base	564	1018	106	72	110	268

TABLE XXIX (Contd.)

Sales/Service Area as % of Total Square Footage.	Detailed Geographical Location of Firm.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Under 30%	12.7	10.8	1.9			6.0	8.7
30 - 39	2.4	2.9					
40 - 49	10.9	4.9	1.9		10.7		2.8
50 - 59	15.4	17.4	15.2			16.5	5.7
60 - 69		6.5	20.5	10.3	10.2	20.0	7.5
70 - 79		11.3	7.0				7.5
80 - 89	7.6	16.0	3.8	14.5	13.6	8.7	6.3
90% +	7.6					5.4	17.8
100/ same	2.6	4.5			15.6	18.1	12.5
Cannot dist.							
Did not exist	37.1	25.7	49.8	67.8	49.8	25.4	31.2
No information	3.6			7.3			
Total	100	100	100	100	100	100	100
Base	193	411	158	71	96	346	661

TABLE XXIX (Contd.)

Sales/Service Area as % of Total Square Footage	Detailed Geographical Location of Firm.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga	
Under 30%	8.8						5.5
30 - 39							1.4
40 - 49	12.5		14.1	33.3			6.1
50 - 59		6.0			60.5		9.3
60 - 69	24.9	4.6	18.3		9.9		10.3
70 - 79		22.8	17.1				6.9
80 - 89	19.0			33.3			9.5
90% +	6.4					21.7	8.4
100/same			6.1		12.9		10.6
Cannot dist.							
Did not exist	18.8	63.4	44.4	33.3	16.6	78.3	30.6
No information	9.6	3.1					1.4
Total	100	100	100	100	100	100	100
Base	36	171	130	31	42	48	4528

TABLE XXX

Percentage Distribution of Firms in Terms of Sales/Service Area as a Percentage of Total Square Footage in 1960/61 according to Detailed Location of Establishment.

Sales/Service Area as % of Total Square Footage.	Detailed Geographical Location of Firm.					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Under 30%	2.0	2.0			5.0	4.0
30 - 39		1.5			9.8	2.0
40 - 49	5.3	10.0		15.3		7.9
50 - 59	11.7	2.6		27.2	19.6	5.9
60 - 69	10.2	7.5				9.4
70 - 79	5.3	2.6	23.1	15.0	9.6	3.9
80 - 89	5.4	9.4			9.6	3.9
90% +	4.4	13.6	10.0		26.7	10.4
100/same	11.2	14.8				3.9
Cannot dist.						
Did not exist	39.0	33.6	66.9	30.4	19.6	48.7
No information	5.4	2.3		12.1		
Total	100	100	100	100	100	100
Base	564	1018	106	72	110	268

TABLE XXX (Contd.)

Sales/Service Area as % of Total Square Footage.	Detailed Geographical Location of Firm.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Under 30%	12.7	5.8				6.0	7.5
30 - 39	2.4	2.9					
40 - 49	3.6	7.4					2.8
50 - 59	15.4	10.9	15.2			16.5	4.1
60 - 69		6.5	20.5	10.3	8.9	16.5	
70 - 79		11.3	8.9		1.4		7.5
80 - 89	2.4	15.9	1.9	14.5	10.7	5.1	6.4
90% +	5.2						10.3
100/same	2.6	5.2			15.6	18.1	8.4
Cannot dist.							
Did not exist	52.0	33.9	53.6	67.8	63.4	37.8	53.1
No information	3.6			7.3			
Total	100	100	100	100	100	100	100
Base	193	411	158	71	96	346	661

TABLE XXX (Contd.)

Sales/Service Area as % of Total Square Footage	Detailed Geographical Location of Firm.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga	
Under 30%	8.8						3.7
30 - 39			7.9				1.3
40 - 49	12.5			33.3			5.3
50 - 59					60.5		8.3
60 - 69	24.9		12.2		9.9		7.1
70 - 79		13.7	17.1				5.9
80 - 89				33.3			6.8
90% +	6.4					21.7	7.1
100/same			6.1		13.0		8.6
Cannot dist.							
Did not exist	18.8	83.2	56.6	33.3	16.6	78.3	43.6
No information	28.6	3.1					2.3
Total	100	100	100	100	100	100	100
Base	36	171	130	31	42	48	4528

TABLE XXXI

Percentage Distribution of Firms in Terms of Sales/Service Area as a Percentage of Total Square Footage in 1958/59 according to Detailed Location of Establishment.

Sales/Service Area as % of Total Square Footage.	Detailed Geographical Location of Firm.					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Under 30%	3.5	2.0			5.0	2.0
30 - 39					9.8	2.0
40 - 49	1.9	8.1		15.3		5.9
50 - 59	12.3	2.6		27.2	19.6	7.9
60 - 69	9.3	7.5				9.4
70 - 79	3.8	2.6	23.1	15.0	9.6	3.9
80 - 89	6.4	9.4			9.6	3.9
90% +	4.4	10.7	10.0		26.7	9.7
100/same	6.8	12.6				
Cannot dist.						
Did not exist	46.3	42.2	67.0	30.4	19.6	55.2
No information	5.4	2.3		12.1		
Total	100	100	100	100	100	100
Base	564	1018	106	72	110	268

TABLE XXXI (Contd.)

Sales/Service Area as % of Total Square Footage.	Detailed Geographical Location of Firm.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Under 30%	17.9	4.1				6.0	7.5
30 - 39	2.4	2.9					
40 - 49	3.6	7.4					2.8
50 - 59	5.1	10.9	8.2			16.5	4.1
60 - 69		2.4	17.1	10.3	8.9	16.5	
70 - 79		5.4	7.0				7.5
80 - 89		16.0	1.9	14.5		5.1	5.2
90% +	5.2						2.8
100/same	2.6	7.7			15.6	15.6	8.4
Cannot dist.							
Did not exist	59.6	43.2	65.8	67.8	75.5	40.3	61.7
No information	3.6			7.3			
Total	100	100	100	100	100	100	100
Base	193	411	158	71	96	346	661

TABLE XXXI (Contd.)

Sales/Service Area as % of Total Square Footage	Detailed Geographical Location of Firm.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga	
Under 30%	8.8						3.9
30 - 39							.7
40 - 49	12.5						4.1
50 - 59					60.5		7.9
60 - 69	12.5		6.1				6.0
70 - 79		13.7	14.1		10.0		5.2
80 - 89			1.5	33.3			6.4
90% +	6.4						5.1
100/same							7.0
Cannot dist.							
Did not exist	31.2	83.2	78.3	33.3	29.6	100	51.3
No information	28.6	3.1		33.3			2.5
Total	100	100	100	100	100	100	100
Base	36	171	130	31	42	48	4528

TABLE XXXII

Percentage Distribution of Firms in Terms of Sales/Service Area as a Percentage of Total Square Footage in 1951/52 according to Detailed Location of Establishment.

Sales/Service Area as % of Total Square Footage.	Detailed Geographical Location of Firm.					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Under 30%	2.5	1.3			5.0	2.0
30 - 39					9.8	
40 - 49		4.4		7.7		5.9
50 - 59	8.5	1.9		12.1	9.8	2.0
60 - 69	3.6	2.6				
70 - 79	5.1	.7				3.9
80 - 89	1.7	6.5				7.8
90% +	2.5	7.8			26.7	2.0
100/same	6.8	9.8				
Cannot dist.						
Did not exist	63.9	62.7	100	68.1	48.7	74.4
No information	5.4	2.3		12.1		2.0
Total	100	100	100	100	100	100
Base	564	1018	106	72	110	268

TABLE XXXII (Contd.)

Sales/Service Area as % of Total Square Footage.	Detailed Geographical Location of Firm.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Under 30%	12.7	4.1				3.5	7.5
30 - 39							
40 - 49		1.9					1.1
50 - 59	2.4	6.8	8.2			16.5	1.6
60 - 69			8.2			16.5	
70 - 79			7.0				7.5
80 - 89		11.7				5.1	2.5
90% +							
100/same		6.4			15.6	15.6	4.8
Cannot dist.							
Did not exist	81.2	67.8	76.6	92.7	84.4	42.8	74.9
No information	3.6	1.2		7.3			
Total	100	100	100	100	100	100	100
Base	193	411	158	71	96	346	661

TABLE XXXII (Contd.)

Sales/Service Area as % of Total Square Footage	Detailed Geographical Location of Firm.						Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga	
Under 30%							3.1
30 - 39							.2
40 - 49							1.8
50 - 59							4.5
60 - 69	12.5						2.6
70 - 79		9.1	8.0				2.9
80 - 89			1.5				3.9
90% +							2.8
100/same							5.6
Cannot dist.							
Did not exist	59.0	87.8	91.0	66.7	100	100	69.8
No information	28.6	3.1		33.3			2.7
Total	100	100	100	100	100	100	100
Base	36	171	130	31	42	48	4528

TABLE XXXIII

Percentage Distribution of Firms which have not moved according to Value of Sales/Services during 1964/65 as a Percentage of Sales/Services in 1966 by Type of Firm within Major Ecological Zones.

Proportion which Value of Sales/Services in 1964/65 was of Turnover in 1966.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
0 - 12.4%	Insufficient information									
12.5 - 24										
25 - 29										
30 - 34										
35 - 39										
40 - 44										
45 - 49										
50 - 54		8.3								
55 - 59										
60 - 64		4.2				4.3				
65 - 69								7.9	9.1	
70 - 74					6.7	4.3				
75 - 79					13.3				9.1	
80 - 84		12.5				4.3	14.3			6.7
85 - 89		4.2	5.9	28.6	20.0	8.7		7.9		2.3
90 - 94		20.8			6.7	8.7	14.3	7.9	9.1	6.7
95 - 99		16.7	11.8	28.6	6.7	17.4	28.6	7.9	9.1	
100%		12.5	5.9		6.7	13.0	28.6	31.5	9.1	53.7
101 - 104			5.9							10.4
105 - 109		4.2								
110 - 119										
120 - 124										
125% +						4.3		7.9		
Firm not established			35.3	14.3	13.3			23.6	36.4	6.7
No information		16.7	35.3	28.6	26.7	34.8	28.6	5.6	18.2	13.4
Total		100	100	100	100	100	100	100	100	100
Mean		87.73	96.70	92.0	86.23	92.61	94.66	96.66	86.60	97.76

TABLE XXXIII (Contd.)

Proportion which Value of Sales/Services in 1964/65 was of Turnover in 1966.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo/ Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
0 - 12.4%									
12.5 - 24									
25 - 29									
30 - 34									
35 - 39									
40 - 44									
45 - 49									
50 - 54								4.2	
55 - 59							3.1		
60 - 64	13.0	4.8							
65 - 69									
70 - 74				6.0			1.7		
75 - 79				6.0					
80 - 84		9.6	6.4				1.7	7.2	
85 - 89		4.8	12.9			12.7	5.8	5.4	
90 - 94		4.8	12.9	6.0			15.8	19.9	
95 - 99		9.6	12.9	24.2		12.0	15.3	9.7	
100%	22.7	9.6	6.4	22.8		12.7	20.6	1.2	
101 - 104								3.0	
105 - 109								4.3	
110 - 119							6.8	3.0	
120 - 124		4.8							
125% +			6.4	6.0			3.6		100.0
Firm not established	34.2	37.6	9.9	10.9	100.0	31.1	16.7	21.0	
No information	30.1	14.4	32.2	18.1		31.5	8.9	21.1	
Total	100	100	100	100	100	100	100	100	100
Mean	86.16	92.10	95.64	96.27		94.62	96.45	91.25	127.0

TABLE XXXIII (Contd.)

Proportion which Value of Sales/Services in 1964/65 was of Turnover in 1966.	Type of Firm within Major Ecological Zones.							
	Rest of Durban Municipal Area				Outside Durban Municipal Area			
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
0 - 12.4%								
12.5 - 24								
25 - 29								
30 - 34								
35 - 39								
40 - 44								
45 - 49								25.0
50 - 54		.3						
55 - 59							5.5	
60 - 64		1.3	3.0					
65 - 69								
70 - 74						3.7	5.5	
75 - 79					14.3		5.5	
80 - 84	13.8					3.7		25.0
85 - 89		5.9		16.7		11.1	5.5	
90 - 94	13.8	31.1	9.1			11.1	5.5	
95 - 99	13.8	5.0	12.6			11.1		
100%	9.5	17.7	26.1	15.4	14.3	7.4	22.1	
101 - 104			3.0					
105 - 109		1.3	13.0		14.3			
110 - 119			6.1		14.3	3.7		
120 - 124								
125% +		7.2						
Firm not established	16.8	24.3	5.4	35.9	42.9	44.6	28.0	50.0
No information	32.3	5.9	21.7	32.1		3.7	22.1	
Total	100	100	100	100	100	100	100	100
Mean	92.13	97.13	99.57	93.23	99.75	92.60	87.24	64.50

TABLE XXXIV

Percentage Distribution of Firms which have not moved according to Value of Sales/Services during 1962/63 as a Percentage of Sales/Services in 1966 by Type of Firm within Major Ecological Zones.

Proportion which Value of Sales/Services in 1962/63 was of Turnover in 1966.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
0 - 12.4%	Insufficient information									
12.5 - 24										
25 - 29										6.7
30 - 34										
35 - 39										
40 - 44		4.2				4.3				
45 - 49					6.7					
50 - 54		4.2			6.7	4.3				
55 - 59		4.2			6.7					6.7
60 - 64			5.9	14.3	6.7					6.7
65 - 69					6.7		14.3			6.7
70 - 74							14.3	7.9		13.4
75 - 79		8.3				4.3	14.3	15.8	9.1	
80 - 84		8.3								1.3
85 - 89		8.3				4.3	14.3	7.9		
90 - 94		4.2	5.9			4.3			9.1	13.4
95 - 99		4.2	5.9			4.3			9.1	13.4
100%		4.2	5.9			13.0	14.3	7.9		6.7
101 - 104					6.7	4.3				
105 - 109					6.7					
110 - 119								7.9		
120 - 124										
125% +										
Firm not established		4.2	35.2	42.9	26.7	21.7		37.1	36.4	13.4
No information		45.8	41.2	42.9	26.7	34.8	28.6	15.8	36.4	11.4
Total		100	00	100	100	100	100	100	100	100
Mean		77.64	7.75	62.0	70.71	84.98	80.60	87.91	88.66	76.01

TABLE XXXIV (Contd.)

Proportion which Value of Sales/Services in 1962/63 was of Turnover in 1966.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo/ Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
0 - 12.4%									
12.5 - 24			6.4						
25 - 29	13.0								
30 - 34									
35 - 39									
40 - 44									
45 - 49		4.8							
50 - 54		4.8	6.4	6.0			1.6		
55 - 59							14.8		
60 - 64		4.8		6.0			1.6		
65 - 69			6.4					6.0	
70 - 74				6.0			2.9	8.4	
75 - 79			12.9				4.9	10.9	
80 - 84		4.8				6.4	2.5	4.3	
85 - 89						6.0	3.4	5.6	
90 - 94		4.8		6.0		6.0	2.5		100.0
95 - 99							3.9		
100%	22.7	9.6	6.4	22.8		12.7	2.9		
101 - 104							3.4		
105 - 109		4.8						3.0	
110 - 119									
120 - 124									
125% +			6.4				6.7		
Firm not established	34.2	47.2	22.9	35.0	100.0	50.2	36.1	40.9	
No information	30.1	14.4	32.2	18.1		18.7	13.0	21.1	
Total	100	100	100	100	100	100	100	100	100
Mean	73.41	80.31	74.07	84.35		92.24	82.39	78.75	92.0

TABLE XXXIV (Contd.)

Proportion which Value of Sales/Services in 1962/63 was of Turnover in 1966.	Type of Firm within Major Ecological Zones.							
	Rest of Durban Municipal Area				Outside Durban Municipal Area			
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
0 - 12.4%								
12.5 - 24								
25 - 29								
30 - 34								
35 - 39								
40 - 44					14.3	3.7		
45 - 49							5.5	
50 - 54					14.3			25.0
55 - 59						3.7		
60 - 64	13.8		3.0				5.5	
65 - 69		1.3	3.0			3.7		
70 - 74		14.3	3.0			7.4	5.5	
75 - 79		2.5	19.1			3.7	5.5	
80 - 84	13.8	1.3				7.4		
85 - 89		1.3	3.0			3.7		
90 - 94		5.9						
95 - 99	13.8						5.5	
100%	4.8	7.2			14.3		5.5	
101 - 104								
105 - 109			6.5					
110 - 119		5.9	3.0			3.7		
120 - 124								
125% +		1.3	9.6		14.3			
Firm not established	16.8	50.8	37.1	67.9	42.9	58.4	50.2	50.0
No information	37.1	8.4	12.6	32.1		4.7	16.7	25.0
Total	100	100	100	100	100	100	100	100
Mean	82.37	88.59	91.55	-	80.25	71.25	75.83	52.0

TABLE XXXV

Percentage Distribution of Firms which have not moved according to Valué of Sales/Services during 1960/1 as a percentage of Sales/Services in 1966 by Type of Firm within Major Ecological Zones.

Proportion which Value of Sales/Services in 1960/61 was of Turnover in 1966.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
0 - 12.4%										6.7
12.5 - 24										
25 - 29										
30 - 34										
35 - 39										6.7
40		4.0			5.9	4.5				6.7
45		4.0			11.8					
50					5.9					6.7
55							14.3			
60										6.7
65					5.9	9.1				
70		4.0		14.3		4.5	28.6	16.7	8.7	
75		4.0								1.3
80	33.3	8.0				4.5				
85		4.0				4.5	14.3		8.7	6.7
90			5.9							
95		4.0	5.9			9.1	14.3		8.7	13.4
100						4.5		8.3		
101 - 104								8.3		
105 - 109										
110 - 119										
120 - 124										
125% +					5.9					
Firm est. during 1966									8.7	
Firm not yet est. in spec. year	66.7	8.0	41.2	85.7	35.0	27.3		33.3	48.0	29.3
No information		60.0	47.1		23.6	31.8	14.3	33.3	17.3	15.7
Total	100	100	100	100	100	100	100	100	100	100
Mean	82.0	73.25	94.5	72.0	63.67	79.01	77.0	86.38	85.33	60.43

TABLE XXXV (Contd.)

Proportion which Value of Sales/Services in 1960/61 was of Turnover in 1966.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
0 - 12.4%									
12.5 - 24									
25 - 29									
30 - 34		4.8							
35 - 39			12.9						
40		4.8	6.4	12.1				1.2	
45							3.9		
50									
55							2.8	7.2	
60									
65			6.4	6.0			5.2	8.5	
70		4.8	6.4				[illegible]	4.3	
75		4.8					3.3	4.2	
80									100.0
85		4.8				6.0	3.9	1.2	
90		4.8		6.0		6.4	3.3		
95									
100	22.7	4.8	6.4	22.8		6.4	5.7		
101 - 104							3.3	4.3	
105 - 109								3.0	
110 - 119									
120 - 124									
125% +							6.6		
Firm est. during 1966									
Firm not yet est. in spec. year	47.2	51.9	29.1	35.0	100.0	56.2	43.1	42.1	
No information	30.1	14.4	32.2	18.1		25.1	16.0	24.1	
Total	100	100	100	100	100	100	100	100	100
Mean	100	71.71	59.11	79.79	-	93.13	86.68	74.66	82.0

TABLE XXXV (Contd.)

Proportion which Value of Sales/Services in 1960/61 was of Turnover in 1966.	Type of Firm within Major Ecological Zones.							
	Rest of Durban Municipal Area				Outside Durban Municipal Area			
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
0 - 12.4%								
12.5 - 24								
25 - 29								
30 - 34								
35 - 39							5.5	
40						3.8		
45					14.3			
50						3.8		
55								
60		2.5	3.0			7.7	11.1	
65		7.2	3.0					
70		1.3	9.4			3.8		
75			3.0			3.8		
80		1.3						
85		1.3						
90			6.4					
95	13.8	1.3	3.0					
100	4.8	5.9			14.3			
101 - 104								
105 - 109								
110 - 119		5.9	3.0					
120 - 124								
125% +			6.4		14.3			
Firm est. during 1966								
Firm not yet est. in spec. year	16.9	53.1	43.8	67.9	42.9	69.3	66.8	75.0
No information	64.6	20.3	18.9	32.1	14.3	7.7	16.6	25.0
Total	100	100	100	100	100	100	100	100
Mean	97.77	87.73	89.54	-	91.33	61.17	53.72	-

TABLE XXXVI

Percentage Distribution of Firms according to Intended Increases in Square Footage by Type of Firm within Major Ecological Zones.

Intended increase in present Square Footage.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
No information										2.3
Increases 300% or more						4.5				
100% - 299%			5.9				14.3	16.7		
75% - 99%			5.9			4.5				6.7
50% - 74%				14.3	5.9			8.3		
25% - 49%		4.0				4.5			13.4	
12.5% - 24%								8.3		6.7
6.25% - 12.4%										
1% - 6.24%							14.3		8.7	1.3
No increase intended.	100.0	96.0	88.2	85.7	94.1	86.4	71.4	66.7	77.9	83.0
Total	100	100	100	100	100	100	100	100	100	100
Base	21	170	148	76	93	233	14	182	228	438

TABLE XXXVI (Contd.)

Intended increase in present Square Footage.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
No information							3.3	4.3	100.0
Increases 300% or more									
100% - 299%				6.0		6.4	2.8	10.2	
75% - 99%			6.4				2.4		
50% - 74%		4.8					2.4		
25% - 49%								1.2	
12.5% - 24%							2.8		
6.25% - 12.4%		4.8					2.4		
1% - 6.24%						6.0	2.4	3.0	
No increase intended.	100.0	90.4	93.6	94.0	100.0	87.6	81.4	81.3	
Total	100	100	100	100	100	100	100	100	100
Base	67	224	85	176	3	79	427	235	1

TABLE XXXVI (Contd.)

Intended increase in present Square Footage.	Type of Firm within Major Ecological Zones.								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
No information	27.5	11.8			28.6	7.7			4.2
Increases 300% or more			3.0						.4
100% - 299%		11.8	3.0			3.8	11.1		4.9
75% - 99%						7.7	5.5		2.0
50% - 74%				15.4					1.2
25% - 49%		11.8	6.4			3.8		25.0	3.9
12.5% - 24%		1.3					5.5		1.7
6.25% - 12.4%								25.0	.5
1% - 6.24%		1.3							1.3
No increase intended.	72.5	62.0	87.6	84.6	71.4	77.0	77.9	50.0	79.9
Total	100	100	100	100	100	100	100	100	100
Base	109	814	244	8	37	269	143	8	4528

TABLE XXXVII

Percentage Distribution of Firm according to Time of Intended Increase in Square Footage by Type of Firm within Major Ecological Zones.

Time of Intended increase in square footage.	Type of Establishment within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Within 6 months		4.0	11.8	14.3				16.7		6.7
6 - 11 months								8.3	8.7	
1 yr. - 1 yr. 11 mths						9.1		8.3	8.7	8.0
2 yrs. - 2 yrs. 11 mths							14.3			
3 yrs. - 4 yrs. 11 mths					5.9		14.3			
5 yrs. - 10 yrs.										
No increase intended	100.0	96.0	88.2	85.7	94.1	86.4	71.4	66.7	77.9	83.0
No information						4.5			4.7	2.3
Total	100	100	100	100	100	100	100	100	100	100
Base	21	170	148	76	93	233	14	182	228	438

TABLE XXXVII (Contd.)

Time of Intended increase in square footage.	Type of Establishment within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Within 6 months		4.8		6.0			4.8	9.0	
6 - 11 months						6.4		5.5	
1 yr. - 1 yr. 11 mths							2.8		
2 yrs. - 2 yrs. 11 mths			6.4			6.0			
3 yrs. - 4 yrs. 11 mths									
5 yrs. - 10 yrs.		4.8							
No increase intended	87.0	90.4	93.6	94.0	100.0	87.6	81.4	81.3	
No information	13.0						10.9	4.3	100.0
Total	100	100	100	100	100	100	100	100	100
Base	67	224	85	176	3	79	427	235	1

TABLE XXXVII (Contd.)

Time of intended increase in square footage.	Type of Establishment within Major Ecological Zones.								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
Within 6 months		8.4	6.4			3.8			5.6
6 - 11 months		11.8				11.5	16.6	25.0	4.5
1 yr. - 1 yr. 11 mths								25.0	2.3
2 yrs. - 2 yrs. 11 mths		5.9	3.0						1.5
3 yrs. - 4 yrs. 11 mths				15.4					.2
5 yrs. - 10 yrs.									.2
No increase intended	72.5	62.0	90.6	84.6	71.4	77.0	77.9	50.0	79.9
No information	27.5	11.8			28.6	7.7	5.5		5.8
Total	100	100	100	100	100	100	100	100	100
Base	109	814	244	8	37	269	143	8	4528

TABLE XXXVIII

Percentage Distribution of Firm according to intended increases in total floorspace by means of acquiring additional space.

Intended increase in total floorspace.	No information	No definite plans	Extend within present site	Occupy premises next door	Will build on vacant adjoining site	Will build above premises	Move to larger site premises	Will occupy premises elsewhere in building	Other means of acquiring space	No need/not applicable	Total %
No information	80.2									.6	4.2
Increases 300% +							6.6			.2	.4
100 - 299			10.4	17.4		53.5	59.7		54.7	.5	4.9
75 - 99			12.0	12.0	54.5	46.5			18.3		2.0
50 - 74	4.8		4.9				16.3		6.3		1.2
25 - 49	3.2		31.5	44.8	5.3			59.0	11.7		3.9
12.5 - 24			27.3		20.9						1.7
6.25 - 12.4			5.2				6.5				.5
1 - 6.24	4.8		4.2	16.1			4.4	41.0			1.3
No change	7.0	100.0	4.4	9.6	19.3		6.5		9.0	98.7	79.9
Total	100	100	100	100	100	100	100	100	100	100	100
Base	215	179	245	151	38	19	160	18	88	3416	4528

TABLE XXXIX

Percentage Distribution of Firms according to Estimated Value of Sales in 1967/68 and 1970/71 as a Percentage of Present by Type of Establishment within Major Ecological Zones.

Estimated Future Total Value of Sales as percentage of present figure.	Type of Outlet within Major Ecological Zones and year at which future Turnover is estimated.													
	Market Stalls				Hard Core of Central Business District									
	White		Indian		P/S		Conv.		L/Dur.		S/Dur.		L/Var.	
	1967/68	1970/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71
Cannot say/Don't know			20.0	44.0	11.8	23.5			5.9	11.8	9.1	18.2		
80% or below			8.0			5.9					4.5			
81 - 89%														
90 - 99					5.9				5.9	5.9	4.5			
100% or steady	33.3	33.3	8.0	4.0	23.5	17.6	14.3	14.3	5.9	5.9	18.2	18.2		
101 - 104%					5.9									
105 - 109			4.0		5.9	5.9	14.3		5.9	5.9	9.1	4.5	57.1	
110 - 114	33.3		24.0	12.0	17.6	17.6	42.9	14.3	23.6	5.9	9.1	9.1		14.3
115 - 119		33.3		4.0	5.9				5.9		9.1			
120 - 124			20.0		11.8	5.9	28.6	14.3	17.3	11.8	13.6	13.6	28.6	14.3
125 - 129	33.3	33.3	4.0	8.0				14.3	11.8	5.9	9.1	4.5	14.3	14.3
130 - 144			4.0	16.0		5.9		14.3		5.9		4.5		14.3
145 - 159				4.0				28.6	17.7	23.2	9.1	4.5		42.9
160 - 174			4.0	4.0						5.9		13.6		
175 - 204			4.0	4.0	11.8	5.9				11.8	4.5	4.5		
205 - 234														
235% and over						11.8						4.5		
Increase														
Decrease														
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Base	21		170		148		76		93		233		14	
Mean	113.0	114.66	117.97	133.10	118.69	135.88	112.42	128.85	121.40	138.30	117.74	136.17	114.15	136.28

TABLE XXXIX (Contd.)

Estimated Future Total Value of Sales as percentage of present figure.	Type of Outlet within Major Ecological Zones and year at which future Turnover is estimated.													
	Grey Street Area						Rest of Central Business District							
	P/S		Conv.		Dur.		P/S		Conv.		L/Dur.		S/Dur.	
	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71
Cannot say/Don't know		8.3				6.7	17.1	17.1	9.6	24.1			6.0	6.0
80% or below			8.7	8.7	13.4	6.7			4.8				6.0	
81 - 89%														6.0
90 - 99	8.3	8.3			6.7	9.1							6.0	6.0
100% or steady	33.3	25.0	26.0	17.3	42.7	20.2	48.6	48.6	19.3	19.3	6.4	6.4	22.8	22.8
101 - 104%	8.3	8.3			6.7								6.0	
105 - 109			8.7	8.7		6.7	4.2		19.3	4.8	12.9	12.9	12.1	18.1
110 - 114		8.3	8.7		6.7		13.0	4.2	14.4	14.4	32.2	6.4	12.1	
115 - 119							4.2	4.2	6.1		6.4	6.4	6.0	6.0
120 - 124			8.7	8.7	2.3	6.7		13.0	9.6	9.6	6.4	6.4	1.6	6.0
125 - 129			17.3	8.7	13.4	20.2			4.8	1.2			12.1	
130 - 144			13.4	4.7	1.3				4.8	9.6	6.4	25.8		
145 - 159	25.0		8.7	8.7	6.7	15.7	13.0		6.1		6.4		9.2	13.7
160 - 174				8.7		1.3				4.8	6.4	6.4		6.0
175 - 204	25.0	33.3		26.0		6.7		13.0	1.3	12.1	6.4	12.9		7.6
205 - 234												6.4		
235% and over		8.3									9.7	9.7		1.6
Increase														
Decrease														
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Base	182		228		438		67		224		85		176	
Mean	135.16	146.94	115.51	137.98	105.34	121.70	111.23	118.93	113.74	129.15	137.62	151.85	110.69	124.21

TABLE XXXIX (Contd.)

Estimated Future Total Value of Sales as percentage of present figure.	Type of Outlet with Major Ecological Zones & year of which future Turnover is estimated.													
	Rest of Central Business District		Warwick/Berea/Umbilo/Old Borough								Rest of Durban Municipal Area			
	L/Var.		P/S		Conv.		Dur.		L/Var.		P/S		Conv.	
	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71
Cannot say/Don't know			6.4	25.1	13.8	21.6	10.9	24.8				27.5		20.3
80% or below			6.0		4.8	2.4					13.8		5.9	5.9
81 - 89%													1.3	
90 - 99					2.4								13.1	1.3
100% or steady			12.4	12.4	13.4	13.4	5.4	4.2			30.6	16.9	8.9	7.6
101 - 104%					.7								2.5	
105 - 109			6.4	6.4	19.5	3.9	8.5				23.3		2.5	2.5
110 - 114			12.0		18.8	10.5	30.7	1.2	100		18.5	32.3	9.7	2.5
115 - 119					2.4	2.4		13.9			13.8	18.5	5.9	
120 - 124			19.1	6.4	13.4	9.6	8.4	4.2					5.9	7.2
125 - 129	100		18.7	6.0	3.3	2.4	7.2			100			26.2	1.3
130 - 144			6.4	6.0		8.3	11.5	7.2						14.4
145 - 159			6.4	12.4	2.8	17.1	6.7	21.1					6.3	13.1
160 - 174								7.2						
175 - 204		100	6.4	19.1	2.4	3.5	1.2	7.8				4.8	11.8	12.2
205 - 234														5.9
235% and over				6.4	2.4	4.8	9.6	8.4						5.9
Increase														
Decrease														
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Base	3		79		427		235		1		109		814	
Mean	127.0	189.50	122.45	151.67	115.92	133.68	135.01	155.09	112.0	127.0	102.74	115.60	122.22	149.86

TABLE XXXIX (Contd.)

Estimated Future Total Value of Sales as percentage of present figure.	Type of Outlet with Major Ecological Zones and year of which future Turnover is estimated.													
	Rest of Durban Municipal Area				Outside Durban Municipal Area								Total	
	Dur.		L/Var.		P/S		Conv.		Dur.		L/Dur.			
	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71	67/68	70/71
Cannot say/Don't know	6.0	21.9				14.3	11.5	24.0		5.5			5.7	17.2
80% or below													4.7	2.6
81 - 89%													.2	.2
90 - 99	6.4												4.7	1.8
100% or steady	12.4	3.0	16.7	16.7	28.6		12.5	12.5	11.1	5.5			18.0	13.2
101 - 104													1.9	.3
105 - 109	6.0				28.6		7.7						7.9	3.7
110 - 114	24.2		67.9			42.9	11.5	3.8	22.1	5.5	25.0		15.0	6.2
115 - 119	12.4	3.0		15.4			3.8		5.5		25.0	25.0	4.2	2.3
120 - 124	12.0	20.0	15.4		28.6		17.4	11.5	22.1	16.6	50.0		10.1	8.3
125 - 129	6.4	9.4					11.5	3.8		11.1			10.7	5.2
130 - 144		16.6		16.7		14.3	4.9	8.7	5.5	11.1		50.0	2.5	8.4
145 - 159	7.6	3.0			14.3		15.3	11.5	20.5	11.1		25.0	7.8	10.6
160 - 174	6.4	9.4						3.8		9.5			.6	3.5
175 - 204		13.6		51.3		14.3		11.5	13.0	5.5			4.9	10.7
205 - 234								3.8		5.5			-	1.6
235% and over						14.3	3.8	4.9		13.0			1.1	4.1
Increase														
Decrease														
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Base	244		8		37		269		143		8		4528	
Mean	118.85	148.82	111.53	154.65	115.71	152.0	128.22	150.02	132.84	157.71	118.25	135.75	119.27	139.22

TABLE XL

Percentage Distribution of Establishments according to intention to add particular Commodities/Services by type of firm and Major Ecological Zones.

Type of Commodity/ Service to be added.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
None	100	76.0	88.2	71.5	70.5	86.3	28.6	91.7	56.7	62.9
Luxuries										
Toiletries									8.7	6.7
Food and Drink		20.0		14.3		4.5	14.3		17.3	
Catering and Serving/ meals									8.7	
Clothing								8.3	8.7	20.2
Soft Goods										2.3
Machinery - incl. Office Equipment					5.9		14.3			
Hardware									8.7	
Travel/Recreation/ Novelties/etc.		4.0	5.9			4.5			8.7	
Household Goods										6.7
House-Office Furniture					5.9		14.3			1.3
Electrical Goods					17.7	4.5	28.6			6.7
Cars and Transport					5.9					
Other Goods			5.9				28.6			
No information				14.3						
Base	21	170	148	76	93	233	14	182	228	438

Note: Percentages do not always add up to 100 since sometimes more than one answer was given.

TABLE XL (Contd.)

Type of Commodity/ Service to be added.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo/ Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
None	74.1	80.7	93.6	81.7	100	81.3	57.1	74.6	100
Luxuries				1.6				4.2	
Toiletries							2.8		
Food and Drink		14.4					16.9	4.2	
Catering and Serving/ Meals							3.3		
Clothing						6.4	5.2	4.2	
Soft Goods							2.4	1.2	
Machinery - incl. Office Equipment									
Hardware							2.4	1.2	
Travel/Recreation/ Novelties/etc.				16.7			2.8		
Household Goods								3.0	
House-Office Furniture									
Electrical Goods								3.0	
Cars and Transport			6.4					3.0	
Other Goods		4.8						4.3	
No information	25.9					12.4	12.3	4.3	
Base	67	224	85	176	3	79	427	235	1

TABLE XL (Contd.)

Type of Commodity/ Service to be added.	Type of Firm within Major Ecological Zones.							
	Rest of Durban Municipal Area				Outside Durban Municipal Area			
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
None	100	75.1	64.5	100	100	64.5	62.9	75.5
Luxuries			3.0					
Toiletries		11.8				1.0		
Food and Drink						7.7		25.0
Catering and Serving/ Meals		1.3						
Clothing			6.4			3.8	9.5	
Soft Goods						3.8		
Machinery - incl. Office Equipment								
Hardware			3.0			11.5		
Travel/Recreation/ Novelties/etc.						7.7		
Household Goods			6.4					
House-Office Furniture			12.8				5.5	25.0
Electrical Goods								
Cars and Transport			10.1					
Other Goods		5.9	3.0			3.8	11.0	
No information		5.9				3.8	16.6	
Base	109	814	244	8	37	269	143	8

TABLE XLI

Percentage Distribution of Firms according to intended changes in services or facilities by type of Establishment and Major Ecological Zones.

Changes in Service or Facilities intended.	Type of Establishment within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Better display								16.7	17.3	20.2
Greater variety of goods							28.6		8.7	
Self service		4.0				4.5				6.7
Restaurant/ Catering							14.3			
Deliveries/Calling										
Change contributing to comfort/redecorating/ music/fitting rooms								8.3		
Outfitting										
Turkish bath/massage/ qualified person for special service/ passport service			5.9							
More floorspace/counters/sales area										
Other				14.3	5.9	4.5	28.6		13.4	1.3
No change	100	96.0	94.1	85.7	94.1	90.9	28.6	75.0	60.6	71.9
No information										
Total	100	100	100	100	100	100	100	100	100	100
Base	21	170	148	76	93	233	14	182	228	438

TABLE XLI (Contd.)

Changes in Service or Facilities intended	Type of Establishment within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Better display						6.4			
Greater variety of goods				16.7		6.4			
Self service		4.8		1.6			12.9	1.2	
Restaurant/ Catering		9.6					3.3		
Deliveries/Calling							2.4		
Change contributing to comfort/redecorating/ music/fitting rooms						6.4			
Outfitting									
Turkish bath/massage/ qualified person for special service/ passport service									
More floorspace/counters/sales area									
Other		4.8	6.4	6.0		6.4	5.2	7.2	
No change	100	80.7	93.6	75.6		74.5	76.1	87.4	100
No information					100			4.3	
Total	100	100	100	100	100	100	100	100	100
Base	67	224	85	176	3	79	427	235	1

TABLE XLI (Contd.)

Changes in Service or Facilities intended.	Type of Establishment within Major Ecological Zones.								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
Better display		17.7	12.9			3.8			7.7
Greater variety of goods			3.0			3.8	3.9		1.8
Self service		8.4	9.0			15.3			5.5
Restaurant/ Catering									.8
Deliveries/Calling			3.0						.4
Change contributing to comfort/redecorating/ music/fitting rooms	27.5		6.0						1.4
Outfitting									-
Turkish bath/massage/ qualified person for special service/ passport service					28.6				.4
More floorspace/counters/sales area									
Other		5.9	3.0	15.4	14.3				4.4
No change	72.5	50.2	63.1	84.6	57.1	65.5	90.5	100	73.2
No information		17.7				11.5	5.5		4.3
Total	100	100	100	100	100	100	100	100	100
Base	109	814	244	8	37	269	143	8	4528

TABLE XLII

Percentage distribution of Firms according to reasons for intention to add Commodities or Services by type of Establishment within Major Ecological Zones.

Reasons for intended addition.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
To attract particular Customers							14.3		8.7	
Increased Turnover		4.0		14.3	17.7		14.3			14.7
Ready Market		8.0	5.9		5.9	4.5		8.3	34.6	2.3
Added Attraction/ Advert Image Builder		8.0			11.8	4.5	28.6			6.7
Service for Customers			5.9				14.3			
Other			5.9	14.3						
Not applicable	100	76.0	82.4	42.9	64.6	81.8	28.6	83.3	56.7	62.9
No information		4.0		28.6		9.1		8.3		13.4
Total	100	100	100	100	100	100	100	100	100	100
Base	21	170	148	76	93	233	14	182	228	438

TABLE XLII (Contd.)

Reasons for intended addition.	Type of Firm within Major Ecological Zones. Rest of Central Business District P/S	Conv.	L/Dur.	S/Dur.	L/Var.	Warwick/Berea/Umbilo Old Borough P/S	Conv.	Dur.	L/Var.
To attract particular Customers									
Increased Turnover		4.8	6.4	1.6		12.7	12.9	9.6	
Ready Market				16.7			13.8		
Added Attraction/ Advert Image Builder	13.0	4.8					2.4	4.3	
Service for Customers		9.6					3.3		
Other		4.8				6.4			
Not applicable	87.0	75.9	93.6	81.7	100	80.9	61.0	77.6	100
No information							6.6	8.5	
Total	100	100	100	100	100	100	100	100	100
Base	67	224	85	176	3	79	427	235	1

TABLE XLII (Contd.)

Reasons for intended addition.	Type of Firm within Major Ecological Zones.								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
To attract particular Customers						3.8			.7
Increased Turnover			3.0			7.7	9.5	25.0	5.5
Ready Market		19.0	29.5		14.3	20.2	11.1		11.7
Added Attraction/ Advert Image Builder		1.3			14.3			25.0	2.8
Service for Customers	13.8	1.3	6.0		14.3		5.5		2.2
Other									.8
Not applicable	86.2	72.6	61.5	100	57.1	60.6	68.4	50.0	70.8
No information		5.9				7.7	5.5		5.5
Total	100	100	100	100	100	100	100	100	100
Base	109	814	244	8	37	269	143	8	4528

TABLE XLIII

Percentage Distribution of Goods Selling Fastest and Second Fastest according to Type of Establishment in Major Ecological Zones.

Category of Goods Selling Fastest and Second Fastest.	Type of Establishment in Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Food	33.3	28.0		14.3			28.6		60.6	
Catering and Serving										
Clothing						9.1			17.3	26.9
Machinery					5.9					
Furniture & Appliances					29.5					6.7
Hardware/Spares										
Drink Sales				14.3					8.7	
Vehicles					5.9					
Household Goods					5.9					13.4
Travel & Recreation						4.5				
Books and Records						4.5				
Fuel										
Medicines, Toiletries, Soaps				28.6			42.9		8.7	
Personal Goods		4.0			5.9		14.3			
Sweets, Cigarettes, Tobacco		4.0							34.6	
Other/General Sales							42.9			4.6
One category of goods sold/only	166.7	164.0		142.8	129.1	181.8	71.4		70.1	148.4
Not applicable/P/Ser.			200.0					200		
No inform./No 2nd Ans.			-		17.9					
Base	21	170	148	76	93	233	14	182	228	438

NOTE: Percentages add up to more than 100 since more than one type of goods was mentioned.

TABLE XLIII(Contd.)

Category of Goods Selling Fastest and Second Fastest.	Type of Establishment in Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Food		33.7			100		32.6		100
Catering and Serving		4.8					3.9		
Clothing				6.0			2.8	4.2	100
Machinery				6.0					
Furniture & Appliances			6.4					3.0	
Hardware/Spares							3.3	1.2	
Drink Sales		9.6					6.3		
Vehicles			12.9					3.0	
Household Goods									
Travel & Recreation									
Books and Records				7.6					
Fuel			6.4						
Medicines, Toiletries, Soaps		9.6			100				
Personal Goods		9.6		12.1				1.2	
Sweets, Cigarettes, Tobacco							21.2		
Other/General Sales							3.3	20.0	
One category of goods sold/only		123.0	167.7	145.7			102.2	162.7	
Not applicable/P/Ser.	200					188.0			
No inform./No 2nd Ans.		9.8	7.0	22.8		12.0	14.5	4.4	
Base	67	224	85	176	3	79	427	235	1

TABLE XLIII (Contd.)

Category of Goods Selling Fastest and Second Fastest.	Type of Establishment within Major Ecological Zones.								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
Food		59.5	12.9	67.9		50.9	5.5	87.7	24.4
Catering and Serving		1.3							.8
Clothing		1.3	18.4			7.7	15.0	63.2	7.2
Machinery								12.3	.4
Furniture & Appliances			6.0				16.6		2.4
Hardware/Spares		5.9	6.0	15.4		3.8	5.5	12.3	2.2
Drink Sales		1.3				7.7			2.4
Vehicles			6.0				5.5		1.0
Household Goods			9.4			3.8			2.1
Travel & Recreation			1.1						.3
Books and Records			3.0			3.8			.9
Fuel			18.4						1.1
Medicines, Toiletries, Soaps		5.4	6.4	32.1		4.9		12.3	3.3
Personal Goods			8.7	15.4		3.8	7.5		2.3
Sweets, Cigarettes, Tobacco		12.2							6.1
Other/General Sales			6.0			7.7	5.5		2.9
One category of goods sold/only		101.3	91.5	69.2		86.7	105.5	12.3	118.1
Not applicable/P/Ser.	200				200				13.4
No inform./No 2nd Ans.		12.0	6.0			18.7	33.2		8.6
Base	109	814	244	8	37	269	143	8	4528

TABLE XLIV

Percentage Distribution of Firms according to intention to change Location of Firm by size of Establishment and Detailed Location.

Intention to change location of firm.	Detailed Location of Firm and Size.											
	Hard Core		Central Business District Grey Street		Beach		Albert Park		Winder Street South		Winder Street North	
	Small	Large	S	L	S	L	S	L	S	L	S	L
Yes	20.9	18.1	1.6									22.1
No	70.0	78.7	98.4	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	66.6
Unwilling, but have to/Group Areas	2.6											
Don't know/No information	6.4	3.2										11.3
Total	100	100	100	100	100	100	100	100	100	100	100	100
Base	329	(235)	941	(76)	76	(30)	61	(11)	83	(27)	170	(98)

NOTE: Firms were divided in terms of size at roughly the median floorspace and turnover for all firms in the project area.

TABLE XLIV (Contd.)

Intention to change location of firm.	Detailed Location of Firm and Size.													
	Warwick/ Berea/ Umbilo/ Old Borough		Central Lower		Central Upper		Northern Lower		Northern Upper		Western		Southern	
	Small	Large	S	L	S	L	S	L	S	L	S	L	S	L
Yes	3.1		32.8	19.6	20.4				25.6	3.5			33.1	
No	84.5	100.0	63.8	80.4	79.6	100.0	100.0		74.4	96.5	83.4	100.0	48.6	94.6
Unwilling, but have to/Group Areas														
Don't know/No information	12.4		3.3								16.6		18.3	5.4
Total	100	100	100	100	100	100	100	–	100	100	100	100	100	100
Base	161	(31)	309	(102)	84	(74)	71	(–)	59	(37)	289	(56)	527	(134)

TABLE XLIV (Contd.)

Intention to change location of firm.	Detailed Location of Firm and Size.												Total	
	Queensburgh		Amanzimtoti etc.		Pinetown		Westville		New Germany etc.		Umhlanga etc.			
	Small	Large	S	L	S	L	S	L	S	L	S	L	S	L
Yes			14.0		7.2	14.1	50.0						12.6	8.5
No	100.0	100.0	67.0	100.0	82.0	85.9	50.0	100.0	100.0	71.7	100.0	100.0	80.4	88.2
Unwilling, but have to/Group Areas					10.8								.5	-
Don't know/No information			18.9							28.3			6.5	3.3
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Base	13	(23)	151	(21)	73	(56)	21	(10)	5	(36)	19	(28)	3442	1087

TABLE XLV

Percentage distribution of Firms according to type of area to which the Firm would probably be moved by size of Firm and detailed location.

Type of Area intending to move to.	Detailed Location of Firm and Size.											
	Central Business District											
	Hard Core		Grey Street		Beach		Albert Park		Winder Street South		Winder Street North	
	Small	Large	S	L	S	L	S	L	S	L	S	L
No information	5.9	7.7										
No change intended	72.6	78.7	98.4	100.0	100.0	64.4	100.0	100.0	100.0	100.0	100.0	72.2
To C.B.D. Hard Core	5.9	12.7	1.6									
To area known for specific goods												5.6
To more concentrated shopping area/P.C.												
Closer to potential customers												
To area similar to present one/Another site in same area	14.0					35.6						16.5
Other outlying areas	1.7	.9										5.6
Total	100	100	100	100	100	100	100	100	100	100	100	100
Base	329	(235)	941	(76)	76	(30)	61	(11)	83	(27)	170	(98)

<u>Note:</u> Firms were divided in terms of size at roughly the median floorspace and turnover for all firms in the project area.

TABLE XLV (Contd.)

Type of Area intending to move to.	Detailed Location of Firm and Size.													
	Warwick/ Berea/ Umbilo/ Old Borough		Central Lower		Central Upper		Northern Lower		Northern Upper		Western		Southern	
	Small	Large	S	L	S	L	S	L	S	L	S	L	S	L
No information	6.1		11.2	9.8						3.5	16.6		18.3	5.4
No change intended	84.5	100.0	63.8	80.4	79.6	100.0	100.0		74.4	96.5	83.4	100.0	48.6	94.6
To C.B.D. Hard Core	3.1			9.7										
To area known for specific goods														
To more concentrated shopping area/P.C.					6.0								12.1	
Closer to potential customers			6.2		14.4				25.6				9.1	
To area similar to present one/ Another site in same area			1.6										10.5	
Other outlying areas	6.2		17.2										1.4	
Total	100	100	100	100	100	100	100	-	100	100	100	100	100	100
Base	161	(31)	309	(102)	84	(74)	71	(-)	59	(37)	289	(56)	527	(134)

TABLE XLV (Contd.)

Type of Area intending to move to.	Detailed Location of Firm and Size.												Total	
	Queensburgh		Amanzimtoti etc.		Pinetown		Westville		New Germany etc.		Umhlanga etc.			
	Small	Large	S	L	S	L	S	L	S	L	S	L	S	L
No information			6.8		10.8					28.3			6.6	4.3
No change intended	100.0	100.0	63.5	100.0	82.0	85.9	50.0	100.0	100.0	71.7	100.0	100.0	80.5	87.7
To C.B.D. Hard Core			3.5		7.2								1.5	3.6
To area known for specific goods													-	.5
To more concentrated shopping area/P.C.			5.2										2.2	-
Closer to potential customers													2.7	-
To area similar to present one/ Another site in same area			8.8			14.1	50.0						3.8	3.2
Other outlying areas			12.1										2.7	.7
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Base	13	(23)	151	(21)	73	(56)	21	(10)	5	(36)	19	(28)	3442	1087

TABLE XLVI

Percentage Distribution of Firms according to Type of Areas to which Firms would probably move by Type of Establishment within Major Ecological Zones.

Type of Areas to which firms would probably move.	Type of Firm within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
No information			5.9		6.7	8.7	14.3			
No change intended	100	100	76.5	100	80.0	65.2	71.4	91.7	100	100
To C.B.D. Hard Core			11.8			13.0		8.3		
To Area known for specific goods										
To more concentrated shopping area/P.C.										
Move closer to potential customers										
To Area similar to present one/Another site in same area			5.9		6.7	13.0				
Other Areas					6.7		14.3			
Total	100	100	100	100	100	100	100	100	100	100
Base	21	170	148	76	93	233	14	182	228	438

TABLE XLVI (Contd.)

Type of Areas to which firms would probably move.	Type of Firm within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo/ Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
No information							8.3	9.9	
No change intended	100	100	80.0	87.3	100	74.5	72.8	80.1	100
To C.B.D. Hard Core						6.4		5.0	
To Area known for specific goods			6.7						
To more concentrated shopping area/P.C.						6.4			
Move closer to potential customers						6.4	6.2		
To Area similar to present one/Another site in same area			6.7	12.7		6.4			
Other Areas			6.7				12.7	5.0	
Total	100	100	100	100	100	100	100	100	100
Base	67	224	85	176	3	79	427	235	1

TABLE XLVI (Contd.)

Type of Areas to which firms would probably move.	Type of Firm within Major Ecological Zones.								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
No information		17.8	3.1	26.0		7.7	5.9		6.0
No change intended	85.9	64.4	84.0	74.0	57.1	84.6	70.6	100	82.2
To C.B.D. Hard Core					28.6				2.0
To Area known for specific goods									.1
To more concentrated shopping area/P.C.		5.9	6.7				5.9		1.7
Move closer to potential customers	14.1	5.9							2.1
To Area similar to present one/Another site in same area		5.9	3.1		14.3	3.8	11.8		3.6
Other Areas			3.1			3.8	5.9		2.2
Total	100	100	100	100	100	100	100	100	100.0
Base	109	814	244	8	37	269	143	8	4528

<u>TABLE XLVII</u>

Percentage Distribution of Firms that have and have not ever changed their location according to the main reason for location in their present area by detailed Geographical Location of Firm.

Main Reasons for location in present area.	Detailed Geographical Location of Firm and whether Firm has moved or not.											
	Hard Core		Grey Street		Central Business District Beach		Albert Park		Winder Street South		Winder Street North	
	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M
Presence of Passing Trade	23.4	26.1	33.4	18.5	26.2		30.2		22.8	65.8	21.5	
Residential population concentration nearby	1.5	5.3			13.6		30.2	30.0	11.5		4.4	15.8
Working population concentration nearby	10.8		2.1									
Accessible to roads/bus service/generally central to amenities	19.2	26.9	22.6	15.0				54.7			10.7	15.5
Near to places which attract people e.g. Market, Beach, Cinema	1.1										5.4	
Access for deliveries from S.A.R./Wholesalers/Docks			3.1									
Parking facilities		4.2						15.3				
Presence of other shopping attractions	8.9		3.2		2.7							
Recognized centre for particular product	1.5	2.7								34.2	16.4	16.1
Large customer catchment area/wide area served		2.7									5.3	
Station nearby	3.0											
Took over existing business	21.3	5.2	12.2		21.0		15.4		23.0		18.0	
Attractions of particular race groups			5.0									
Near to potential customers of particular type	2.4		.7		10.3		24.3					15.5
Near respondent's home/near Main Branch			9.5		10.3	100.0			42.8			
Other reasons	3.0	12.1	5.0	54.3	2.7						12.9	28.9
No information	4.0	9.6	3.1	12.2	13.2						5.4	8.1
Total	100	100	100	100	100	100	100	100	100	100	100	100
Base	359	205	936	82	103	3	36	36	94	16	199	68

TABLE XLVII(Contd.)

Main Reasons for location in present area.	Detailed Geographical Location of Firm and whether Firm has moved or not.													
	Warwick/ Berea/ Umbilo/ Old Borough		Central Lower		Central Upper		Northern Lower		Northern Upper		Western		Southern	
	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M
Presence of Passing Trade	23.4	11.4	22.1	14.0	21.7	15.0			9.1		2.4		15.6	11.9
Residential population concentration nearby		10.7	2.5		15.5		73.4		16.1			34.4	3.5	
Working population concentration nearby													2.5	
Accessible to roads/bus service/ generally central to amenities	26.5	22.6			8.7						3.4		1.8	
Near to places which attract people e.g. Mkt./Bch./Cinema	16.1													
Access for deliveries from S.A.R./ Wholesalers/Docks		22.6	8.2	13.6										
Parking facilities	6.7		2.1	9.5	7.4				5.0		3.4		1.8	
Presence of other shopping attractions	13.4		4.4	14.0	10.7					64.8	19.5		1.8	
Recognized centre for particular product									12.9					
Large customer catchment area/wide area served										17.6				
Station nearby														
Took over existing business	4.6		25.7	27.9	34.0				12.9		21.3	32.8	11.1	17.9
Attractions of particular race groups			4.1						1.6				1.8	
Near to potential customers of particular type		10.7	3.0			15.0			9.1		5.2		8.4	8.4
Near respondent's home/near Main Branch		11.4	11.6				15.7		20.3		23.5		30.3	
Other reasons	4.6	10.7	10.7	20.8	2.0	15.0	11.1	100.0	13.0		16.0		10.4	6.0
No information	4.6		5.5			55.1				17.6	5.2	32.8	11.0	55.7
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Base	149	44	338	73	139	19	66	5	30	16	300	46	567	86

TABLE XLVII (Contd.)

Main Reasons for location in present area.	Detailed Geographical Location of Firm and whether Firm has moved or not.													
	Queensburgh		Amanzimtoti etc.		Pinetown		Westville		New Germany etc.		Umhlanga		Total	
	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M
Presence of Passing Trade						21.9					5.9		19.8	15.0
Residential population concentration nearby			17.8		10.6						5.9		5.4	6.8
Working population concentration nearby													1.9	-
Accessible to roads/bus service/ generally central to amenities			12.8							43.4			10.5	15.0
Near to places which attract people e.g. Mkt./Bch./Cinema													1.0	-
Access for deliveries from S.A.R./ Wholesalers/Docks													1.5	2.6
Parking facilities													1.4	2.7
Presence of other shopping attractions	28.5										5.9		5.2	2.7
Recognized centre for particular product					8.4								1.5	2.8
Large customer catchment area/wide area served	14.6										21.7		.7	1.1
Station nearby					16.9								.7	-
Took over existing business	28.5		29.1		42.0	50.6	66.7		22.6		27.6		18.3	10.3
Attractions of particular race groups					11.0								2.2	-
Near to potential customers of particular type	28.5												3.4	3.3
Near respondent's home/near Main Branch		100.0	22.6	100.0					33.6		11.8		13.3	3.4
Other reasons			17.8			27.5	33.3				11.2		8.0	17.1
No information					11.0				43.8	56.6	10.1		4.5	14.4
Total	100	100	100	100	100	100	100	-	100	100	100	-	100	100
Base	36	8	161	11	94	36	31	-	24	18	48	-	3757	772

TABLE XLVIII

Percentage Distribution of Firms that have and have not ever changed their location according to the main reasons for location in their present area by type of Firm within Major Ecological Zones.

Main Reasons for location in present area.	Type of Outlet within Major Ecological Zones and whether firm has moved or not.													
	Market Stalls				Hard Core of Central Business District									
	White		Indian		P/S		Conv.		L/Dur.		S/Dur.		L/Var.	
	Not Moved	Moved	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M
Presence of Passing Trade			12.5				22.0	50.0	20.0	16.8	37.5	50.0	33.3	
Residential population concentration nearby								50.0	20.0					
Working population concentration nearby					18.2						12.5			
Accessible to roads/bus serv/ generally central to amenities			20.8	100	45.5	33.3	20.0			41.3	6.3	16.7	33.3	
Near to places which attract people - Mkt./Bch./Cinema													33.3	
Access for deliveries from S.A.R./Wholesaler/docks														
Parking facilities						16.7								
Presence of other shopping attractions							20.0				12.5			
Recognized centre for particular product									20.0	8.4				
Large customer catchment area/wide area served										8.4				
Station nearby											6.3			
Took over existing business	33.3		33.3		18.2		40.0		20.0		18.8	16.7		
Attractions of particular race groups			4.2											
Near to potential customers of particular type			4.2		9.1									
Near Respondents home/near Main Branch														
Other reasons	33.3		16.7			33.3				8.4	6.3			100.0
No information	33.3		8.3		9.1	16.7			20.0	16.8		16.7		
Total	100		100	100	100	100	100	100	100	100	100	100	100	100
Base	21	-	163	7	96	52	54	22	28	66	170	64	12	2

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TABLE XLVIII (Contd.)

Main Reasons for location in present area.	Type of Outlet within Major Ecological Zones and whether firm has moved or not.													
	Grey Street Area						Rest of Central Business District							
	P/S		Conv.		Dur.		P/S		Conv.		L/Dur.		S/Dur.	
	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M
Presence of Passing Trade	30.0	50.0	52.0		32.6		6.0		28.0				29.5	33.3
Residential population concentration nearby							24.5		10.7	100.0	7.8		3.9	
Working population concentration nearby			8.7											
Accessible to roads/bus serv./ generally central to amenities	20.0				37.4	12.2		43.1	5.3			22.2	7.4	33.3
Near to places which attract people - Mkt./Bch./Cinema									5.3					
Access for deliveries from S.A.R./ Wholesaler/docks					7.5									
Parking facilities												11.1		
Presence of other shopping attractions	20.0								1.4					
Recognized centre for particular product											61.5	33.3	7.4	
Large customer catchment area/ wide area served													7.4	
Station nearby														
Took over existing business	20.0				7.5		18.6		32.0		30.7			
Attractions of particular race groups			4.7		7.5									
Near to potential customers of particular type							18.6						7.4	33.3
Near Respondents home/near Main Branch			26.0		7.5			13.9	5.3				27.8	
Other reasons		50.0	8.7			65.5	32.4	43.1				22.2	9.3	
No information	10.0					22.3			12.0			11.1		
Total	100	100	100	-	100	100	100	100	100	100	100	100	100	100
Base	152	30	228	-	393	45	47	20	203	22	36	50	144	32

TABLE XLVIII (Contd.)

Main Reasons for location in present area.	Type of Outlet within Major Ecological Zones and whether firm has moved or not.													
	Rest of Central Business District		Warwick/Berea/Umbilo/Old Borough								Rest of Durban Municipal Area			
	L/Var.		P/S		Conv.		Dur.		L/Var.		P/S		Conv.	
	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M
Presence of Passing Trade			20.2	17.2	26.8	20.3	17.0				8.6		9.4	13.0
Residential population concentration nearby	100.0			16.2	2.8		10.2						8.3	
Working population concentration nearby														
Accessible to roads/bus serv./ generally central to amenities			19.6		3.3		15.5	23.3					2.8	
Near to places which attract people - Mkt./Bch./Cinema					3.9		5.2							
Access for deliveries from S.A.R./ Wholesaler/docks					5.7		3.6	46.9						
Parking facilities					2.8		8.8	16.5					2.8	
Presence of other shopping attractions			10.1		3.3	16.0	17.0						9.4	13.0
Recognized centre for particular product													1.4	
Large customer catchment area/wide area served												5.8		
Station nearby														
Took over existing business			29.8		28.1	31.8	8.7		100.0			41.7	14.5	13.0
Attractions of particular race groups					3.9								1.4	
Near to potential customers of particular type				16.2			5.2	6.6					6.5	
Near Respondents home/near Main Branch			10.1	17.2	6.7		5.2				49.5		22.5	
Other reasons			10.1	33.3	7.5	16.0	3.6	6.6			17.2	21.5	14.5	
No information					5.1	16.0					24.8	31.0	6.5	60.9
Total	100	-	100	100	100	100	100	100	100	-	100	100	100	100
Base	3	-	49	29	362	65	192	42	1	-	61	48	735	79

TABLE XLVIII (Contd.)

Main Reasons for location in present area.	Type of Outlet within Major Ecological Zones and whether firm has moved or not.													
	Rest of Durban Municipal Area				Outside Durban Municipal Area								Total	
	Dur.		L/Var.		P/S		Conv.		Dur.		L/Var.			
	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M	N/M	M
Presence of Passing Trade	13.9						1.1			20.0			19.8	15.0
Residential population concentration nearby	9.3	60.9					9.4		15.3		14.0		5.4	6.8
Working population concentration nearby	6.7												1.9	-
Accessible to roads/bus serv./ generally central to amenities							8.3			20.0			10.5	15.0
Near to places which attract people - Mkt./Bch./Cinema													1.0	-
Access for deliveries from S.A.R./ Wholesaler/docks													1.5	2.6
Parking facilities			51.3										1.4	2.7
Presence of other shopping attractions							4.2		2.7				5.2	2.7
Recognized centre for particular product									7.7				1.5	2.8
Large customer catchment area/wide area served					20.0		4.2						.7	1.1
Station nearby									15.3				.7	-
Took over existing business	14.4				40.0		34.3	50.0	38.3	20.0			18.3	10.3
Attractions of particular race groups			16.7				4.2						2.2	-
Near to potential customers of particular type	10.6	28.3									72.0		3.4	3.3
Near Respondents home/near Main Branch	34.5		16.7		20.0	100.0	12.5		13.1	20.0			13.3	3.4
Other reasons	3.4		15.4		20.0		12.5		7.7	20.0		100.0	8.0	17.1
No information	7.2	10.9					9.5	50.0			14.0		4.5	14.4
Total	100	100	100	-	100	100	100	100	100	100	100	100	100	100
Base	218	26	8	-	27	11	248	21	103	40	6	2	3757	772

TABLE XLIX

Percentage Distribution of Firms according to satisfactions at present Premises and location of Firm by size of Establishment and detailed location of Firm.

Satisfactions at present site and premises.	Detailed location of Firm and Size.											
	Central Business District											
	Hard Core		Grey Street		Beach		Albert Park		Winder Street South		Winder Street North	
	Small	Large	S	L	S	L	S	L	S	L	S	L
Centrally situated	47.7	53.2	52.1	21.4			49.8		13.0	20.3	18.8	38.6
Easily accessible	10.9	16.9	30.2	14.2	3.7		23.3	50.0			24.1	38.6
Low rentals/overheads	15.5	10.6	4.4				32.1	50.0	25.8		5.1	11.3
Own premises												
Resident in the area	3.3		2.1								6.4	
Near residential population/Regular customers			1.6		11.0	9.4	17.8		13.0		11.4	
Near working population	14.0	.9	5.8								6.4	
Suitable premises	6.4	11.5	5.4	21.1	35.3	18.8	32.1	50.0	13.0		23.9	27.8
Passing trade	35.8	22.2	46.5	64.7	63.7		17.8		61.2	39.9	30.4	
No great competition							9.0					
Easy deliveries from Wholesalers/S.A.R.	3.2	2.3	14.3								6.2	5.6
Parking facilities	2.6	9.2			14.7			50.0	13.0	39.9	6.2	
Near places which attract people/cinemas beaches	3.3	6.0	7.3	25.8	17.9						12.7	10.9
Supported by Non-Whites			1.6						35.4			
Other satisfactions/non-specific satisfactions	19.1	16.8	2.9	13.1	17.9	35.6	9.0		12.8	20.3	21.5	11.3
No satisfactions		3.7	1.4			72.5						22.1
No information	3.2	.9								39.9		
Base	329	(235)	941	(76)	76	(30)	61	(11)	83	(27)	170	(98)

TABLE XLIX (Contd.)

Satisfactions at present site and premises.	Detailed location of Firm and Size.													
	Warwick/ Berea/ Umbilo/ Old Borough		Central Lower		Central Upper		Northern Lower		Northern Upper		Western		Southern	
	Small	Large	S	L	S	L	S	L	S	L	S	L	S	L
Centrally situated	25.3		7.9	17.6	3.3				17.5	3.5				.9
Easily accessible	33.7		9.1	26.3	6.7				17.5		3.6	18.3	3.5	7.7
Low rentals/overheads	9.2	31.5	8.3							27.6			3.3	13.1
Own premises							14.5							
Resident in the area	3.1		9.5			14.0							5.8	
Near residential population/Regular customers	9.1		19.8	19.7	25.2	64.5	67.8		17.2	19.6	30.8	46.2	27.1	13.1
Near working population														35.8
Suitable premises	15.2	46.5	3.2	18.7	3.3	7.6	14.5		9.5	38.3	3.6	27.9	4.5	37.1
Passing trade	36.5	53.5	29.3	11.0	9.3	14.0				11.0		13.0	20.9	
No great competition					6.7		78.1		8.9		5.2		12.1	
Easy deliveries from Wholesalers/S.A.R.	6.1		7.6	20.5	14.4						44.1	27.9	18.1	35.8
Parking facilities	2.9	15.0	7.7	13.7	30.0	34.1			4.8	81.5	3.6		10.2	
Near places which attract people/cinemas beaches		22.0											10.5	5.4
Supported by Non-Whites					6.0									
Other satisfactions/non-specific satisfactions	19.7		38.8	20.5	47.0	14.0			38.0	7.5	60.2	25.9	3.3	20.8
No satisfactions	8.6		9.9	16.6			14.7		17.7	3.5			19.6	
No information	3.1		3.3										9.1	5.4
Base	161	(31)	309	(102)	84	(74)	71	(-)	59	(37)	289	(56)	527	(134)

TABLE XLIX (Contd.)

Satisfactions at present site and premises.	Detailed location of Firm and Size.												Total	
	Queensburgh		Amanzimtoti etc.		Pinetown		Westville		New Germany etc.		Umhlanga			
	Small	Large	S	L	S	L	S	L	S	L	S	L	S	L
Centrally situated	59.8		6.8		28.8	40.2	50.0			21.7			24.6	21.5
Easily accessible	59.8		6.8	50.0	21.6								15.7	13.8
Low rentals/overheads			22.5								27.5		6.9	7.2
Own premises													.3	-
Resident in the area								100					3.1	1.9
Near residential population/Regular customers	40.2		25.8	50.0	10.8	17.6					14.5		14.7	12.9
Near working population													3.2	4.6
Suitable premises		66.7	17.2	50.0	14.1					28.3	43.5	56.4	8.7	23.5
Passing trade			6.8		43.1	64.8		100					29.8	19.1
No great competition													4.4	-
Easy deliveries from Wholesalers/S.A.R.			10.4							21.7		7.1	12.8	9.7
Parking facilities			13.9	50.0	18.0	14.1				50.0	29.0	7.1	5.9	13.8
Near places which attract people/cinemas beaches			5.2						100				5.3	5.4
Supported by Non-Whites			12.1		14.1								2.3	-
Other satisfactions/non-specific satisfactions		66.7	10.4		24.8	17.6	50.0				27.5		17.7	16.8
No satisfactions			27.8									36.5	6.5	7.3
No information			6.8							28.3			2.4	2.8
Base	13	(23)	151	(21)	73	(56)	21	(10)	5	(36)	19	(28)	3442	1087

TABLE XLIX (Contd.)

Satisfactions at present site and premises.	Detailed Location of Firm and Size.			
	Rest of Municipal Area		Outside Municipal Area	
	S	L	S	L
Centrally situated	2.8	5.1	17.6	17.4
Easily accessible	5.4	11.8	12.0	6.0
Low rentals/overheads	3.2	6.9	13.9	
Own premises	.8			
Resident in the area	4.5	2.6		5.7
Near residential population/Regular customers	27.8	29.4	19.4	11.7
Near working population		11.9		
Suitable premises	4.7	25.9	15.8	29.8
Passing trade	15.6	8.2	14.8	26.6
No great competition	10.8			
Easy deliveries from Wholesalers/S.A.R.	19.3	21.0	5.6	5.6
Parking facilities	8.7	17.2	14.1	22.1
Near places which attract people/cinemas beaches	4.1	1.8	4.6	
Supported by Non-Whites	.4		10.1	
Other satisfactions/non-specific satisfactions	27.9	19.0	17.6	14.4
No satisfactions	11.6	4.5	14.9	5.9
No information	4.3	1.8	3.6	5.9
Base	1339	403	282	174

TABLE L

Percentage Distribution of Dissatisfactions at Present Site and Premises according to Major Geographical Zones.

Dissatisfactions at present site and premises.	Broad Geographical Zones.					
	Hard Core	Grey Street	Rest of C.B.D.	Central (Old Borough)	Rest of Municipal Area	Outside Municipal Area
Premises too small	22.3	12.5	15.7	17.2	9.3	32.6
No room to expand	2.5	3.5	9.3	4.9	1.4	1.8
Competition too great	1.5	7.6		7.7	3.0	3.8
High rental	13.5	7.6	8.7	3.6	1.9	3.0
Lack of Parking/Loading Problems	25.6	13.9	14.2	11.2	1.8	11.2
No passing trade	1.9	2.9		6.9	3.2	7.7
Group area difficulties		4.6	2.7	12.8	9.5	1.7
Area too quiet			2.6		6.1	4.6
Business Seasonal						
Premises/Buildings not suitable	7.8	7.1	.5	.9	4.7	1.5
Complaints about area/ traffic	3.8	2.6	8.3	7.9	15.4	6.3
Other/No specific answer	36.5	5.2	29.8	31.7	25.1	32.5
None	16.3	61.0	30.1	34.1	34.1	40.2
No information	1.9	.8		6.7		2.3
Total	100	100	100	100	100	100
Base	564	848	555	742	1175	457

Note: Excludes Market Stalls.

TABLE LI

Percentage distribution of firms according to main satisfactions with present premises and location by race of owner.

Main satisfaction with present premises and location	Race of Owner.			
	White	Indian	Coloured	Total
Centrally situated	20.7	24.1	11.2	22.2
Easily accessible	9.2	7.5		8.2
Low rental/overheads	8.2	.3		4.3
Own premises	.4			.2
Resident in the area	1.4	1.4	20.3	1.7
Near residential population/ customers regular	7.2	12.3		9.5
Near working population	.3			.2
Suitable premises and building	10.7	2.7		6.7
Passing trade	16.1	14.3		15.0
No great competition	.5	5.2		2.7
Easy deliveries from whole-salers/S.A.R.	.6	13.7		6.8
Parking facilities	7.9			4.0
Near places which attract people e.g. beach	1.8	.9		1.4
Supported by Non-Whites		1.3		.6
Other satisfactions/Non-specific satisfaction	8.8	10.1		9.3
No satisfactions	4.1	5.6		4.7
No information	2.2	.5	68.5	2.5
Total	100	100	100	100
Base	2319	2131	78	4528

TABLE LII

Percentage distribution of firms according to main dissatisfactions with present premises and location by race of owner.

Main dissatisfactions with present premises and location.	Race of Owner.			
	White	Indian	Coloured	Total
Premises too small	19.1	7.4	31.5	13.8
No room to expand	2.2	2.6		2.3
Competition too great	3.2	3.7		3.4
High rental	5.0	4.0		4.4
Lack of parking/loading problems	13.3	5.5		9.4
No passing trade	2.5	1.2		1.9
Area declared White/Group area difficulties		6.0		2.8
Area too quiet	1.5	1.5		1.4
Business seasonal				
Premises/building not suitable	2.1	.7	62.1	2.5
Complaints about area/weather/traffic	2.4	10.9		6.3
Other dissatisfaction/non-specific answer	20.2	9.4		14.8
No dissatisfactions	27.3	45.8		35.5
No information	1.4	1.3	6.5	1.4
Total	100	100	100	100
Base	2319	2131	78	4528

TABLE LIII

Percentage Distribution of Respondents (Firms) mentioning particular advantages in Suburbs according to types of Firms and Major Ecological Zones.

Advantages in Suburbs	Types of Establishments within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
Easy to own premises			5.9		5.9					
Regular Customers	33.3	4.0	5.9	28.6		9.1	14.3	16.7	26.0	20.2
Lower Rentals/Higher Profits			23.5		17.7	13.6	14.3		8.7	
Well suited for specific type business							14.3		26.0	1.3
Easy parking			11.8	14.3	17.7	22.7	42.9			
Near concentration of working population										6.7
Near concentration of residential population			5.9			4.5			8.7	
Accessible to non-Whites										
Planned Centre - advantage		4.0					14.3			
No advantages/Area not relevant	33.3	80.0	47.1	42.9	64.6	50.0	14.3	66.7	22.1	71.9
Other advantages/non-specific advantages	33.3	12.0	23.5	14.3	11.8	27.3	14.3	16.7	17.3	1.3
No information	33.3	4.0	5.9	14.3	-	-	14.3	-	-	-
Base	21	170	148	76	93	233	14	182	228	438

Note: Percentages do not add up to 100 since respondents gave more than one answer.

TABLE LIII (Contd.)

Advantages in Suburbs	Types of Establishments within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
Easy to own premises							2.8		
Regular Customers	13.0	19.3				19.1	27.1	10.9	
Lower Rentals/Higher Profits	13.0		19.3	7.6		12.3	20.1	9.6	
Well suited for specific type business		9.6					6.1	7.2	
Easy parking	30.1	30.1	12.9	7.6		25.1	18.0	8.4	100
Near concentration of working population									
Near concentration of residential population	13.0	14.4	3.3	9.2	100	12.7	16.4	10.2	
Accessible to non-Whites									
Planned Centre - advantage	4.2	6.1	9.7			6.4	12.0	6.6	
No advantages/Area not relevant	35.6	39.8	51.6	77.1		43.4	13.1	57.9	
Other advantages/non-specific advantages	12.5	20.5	32.2			12.4	20.8	8.4	
No information	13.0	-	-	6.0	-	-	5.7	-	
Base	67	224	85	176	3	79	427	235	1

TABLE LIII (Contd.)

Advantages in Suburbs	Types of Establishments within Major Ecological Zones.								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
Easy to own premises									.6
Regular Customers	71.9	59.9	47.2	15.4	28.6	36.6			27.4
Lower Rentals /Higher Profits	14.3	14.3	9.0		42.9	15.3	16.6	75.5	11.2
Well suited for specific type business		14.3	16.6			7.7	5.5		7.0
Easy parking	21.7	23.6	3.0	52.6	71.4	14.6	20.5	87.7	14.8
Near concentration of working population						3.8			.9
Near concentration of residential population	13.8		24.4	83.3	14.3	4.9	16.6		7.2
Accessible to non-Whites		5.9			14.3				1.2
Planned Centre - advantage	13.8		12.9			3.8			3.6
No advantages/Area not relevant			6.4			3.8	11.1		32.4
Other advantages/non-specific advantages	13.8	30.8	20.3			38.3	13.0		19.0
No information	-	7.2	-	16.7	14.3	23.0	44.3	12.3	6.0
Base	109	814	244	8	37	269	143	8	4528

TABLE LIV

Percentage Distribution of Respondents (Firms) mentioning particular disadvantages in Suburbs according to types of Firms and Major Ecological Zones.

Disadvantages in Suburbs	Types of Establishments within Major Ecological Zones.									
	Market Stalls		Hard Core of Central Business District					Grey Street Area		
	White	Indian	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.
No passing trade		24.0	17.6		5.9	31.8	14.3	33.3	34.6	40.3
People have more confidence/prefer town			11.8	14.3	23.6	40.9	14.3		8.7	47.0
Serve one area only		24.0	23.5		17.3	13.6	28.6	33.3	8.7	3.5
Far from suppliers/ wholesalers		4.0			5.9					
Distance from town/ necessary to operate in all directions		8.0	17.6		23.6	9.1				2.4
Not enough demand		8.0	23.5	14.3	40.9	13.6	42.9	16.7	26.0	
Not suitable for specific type of business	33.3	20.0	17.6	14.3	5.9	13.6		16.7	8.7	62.9
Competition from Supermarkets/P. Centres	33.3	4.0				4.5			26.0	
Other disadvantages/non-specific disadvantages		40.0	29.4	28.6	17.7	22.7	14.3	16.7	13.4	
No disadvantages	33.3	4.0	5.9	28.6		4.5	14.3		8.7	
No information		4.0		14.3			14.3			6.7
Base	21	170	148	76	93	233	14	182	228	438

Note: Percentages do not add up to 100 since respondents gave more than one answer.

TABLE LIV (Contd.)

Disadvantages in Suburbs	Types of Establishments within Major Ecological Zones.								
	Rest of Central Business District					Warwick/Berea/Umbilo Old Borough			
	P/S	Conv.	L/Dur.	S/Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.
No passing trade	13.0	25.3	6.4	16.7		19.1	11.4	16.9	
People have more confidence/prefer town		4.8	38.7	18.1		18.0	11.8	13.2	
Serve one area only	13.0	4.8	16.2	1.6		24.7	2.4	10.9	100
Far from suppliers/wholesalers		6.1					2.4	5.4	
Distance from town/necessary to operate in all directions			6.4	12.1				4.2	
Not enough demand	25.9	4.8	12.9	42.3		6.4	5.7	15.7	
Not suitable for specific type of business	22.7	28.9	12.9	36.2				21.7	
Competition from Supermarkets/P. Centres							9.2		
Other disadvantages/non-specific disadvantages	21.3	24.1	19.3	19.7		19.1	27.8	17.5	
No disadvantages	17.1	25.3		7.6	100	12.7	43.1	21.1	
No information		4.8	6.4			6.4	2.4		
Base	67	224	85	176	3	79	427	235	1

TABLE LIV (Contd.)

Disadvantages in Suburbs	Types of Establishments within Major Ecological Zones.								Total
	Rest of Durban Municipal Area				Outside Durban Municipal Area				
	P/S	Conv.	Dur.	L/Var.	P/S	Conv.	Dur.	L/Var.	
No passing trade	59.8	39.3	25.3		14.3	12.5	5.5		25.6
People have more confidence/prefer town	23.3		7.6	15.4	14.3	3.8	5.5		13.5
Serve one area only	21.1	24.9	6.4						12.3
Far from suppliers/wholesalers		1.6	9.0			23.0		12.3	3.2
Distance from town/necessary to operate in all directions			9.4			3.8			3.6
Not enough demand	30.1	5.9				7.7	9.5	12.3	11.5
Not suitable for specific type of business			6.4				5.5		14.8
Competition from Supermarkets/P. Centres	13.8	32.5	3.0		14.3		5.5		9.3
Other disadvantages/non-specific disadvantages	14.3	27.4	27.4	71.8	85.7	1.0	18.6	12.3	20.6
No disadvantages	4.8	20.7	24.2	32.1		28.9	16.6	63.2	16.4
No information				16.7	14.3	26.8	44.3	12.3	4.9
Base	109	814	244	8	37	269	143	16	4537

TABLE LV

Percentage distribution of firms according to advantages perceived in suburban location by detailed location of firm.

Advantages in Suburbs.	Detailed location of firm.					
			Central Business District			
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
Easy to own premises	2.5					
Regular customers	9.5	18.1	10.2	15.0	9.8	7.3
Lower rentals/higher profits	15.1	1.9	2.6		5.0	11.3
Well suited for specific type of business	.4	6.3			9.8	4.0
Easy parking	18.4		7.9	37.7	19.6	20.6
Near concentration of working population		2.9				
Near concentration of residential population	3.4	1.9	30.8	15.0	9.8	3.3
Accessible to non-Whites						
Planned centre - advantages	.4	.7	7.9	7.7	9.8	
Other advantages/Non-specific advantage	21.7	9.4	20.8		5.0	20.3
No advantages/Area not relevant	49.8	61.2	43.1	50.2	65.6	51.9
No information	3.8	.7	-	12.1	-	4.0
Base	564	1018	106	72	110	268

NOTE: Percentages do not add up to 100 since respondents gave more than one answer.

TABLE LV (Contd.)

Advantages in Suburbs.	Detailed location of firm.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
Easy to own premises			7.7				
Regular customers	18.6	13.8	44.8	75.2	35.0	76.4	50.0
Lower rentals/higher profits	2.6	22.7	13.0		52.8	8.1	11.3
Well suited for specific type of business	7.3	7.1			2.9	9.6	18.3
Easy parking	2.6	15.5	30.6	14.5	57.8	5.9	21.3
Near concentration of working population							
Near concentration of residential population		20.3	13.0		13.1	6.4	7.0
Accessible to non-Whites							7.3
Planned centre - advantages	5.2	13.7	3.5			8.9	2.4
Other advantages/Non-specific advantage	11.2	16.1	23.6	10.3	5.8	32.2	28.9
No advantages/Area not relevant	67.6	19.9	13.2			4.5	1.1
No information	3.6	5.9	-	-	1.4	-	8.8
Base	193	411	158	71	96	346	661

TABLE LV (Contd.)

Advantages in Suburbs.	Detailed location of firm.							Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga etc.	No Inf.	
Easy to own premises							-	.6
Regular customers	23.4	33.2	8.0	33.3	24.7	22.9	-	27.4
Lower rentals/higher profits	46.7	27.5			31.7	25.9	-	11.2
Well suited for specific type of business		6.0	8.0		18.9			7.0
Easy parking	35.4	10.8	7.6	33.3	56.4	66.5	-	14.8
Near concentration of working population		6.0					-	.9
Near concentration of residential population	12.0	10.6	6.1		18.9	5.9	-	7.2
Accessible to non-Whites		3.1					-	1.2
Planned centre - advantages		6.0					-	3.6
Other advantages/non-specific advantage	41.3	52.8	8.0			5.9	-	19.0
No advantages/Area not relevant		10.6	6.1				-	32.4
No information	-	-	70.3	66.7	24.7	21.7		6.0
Base	36	171	130	31	42	48		4528

TABLE LVI

Percentage distribution of firms according to disadvantages perceived in suburban location by detailed location of firm.

Disadvantages in Suburbs.	Detailed location of firm.					
	Central Business District					
	Hard Core	Grey Street	Beach	Albert Park	Winder Street South	Winder Street North
No passing trade	19.1	35.1	12.9	57.2	36.5	2.1
People have more confidence in town/prefer town	26.2	22.2		15.3	24.4	14.1
Serve one area only	15.4	13.4	5.3	7.7		9.3
Far from suppliers/ wholesalers	1.0	.7	2.6		9.8	
Distance from town/ necessary to operate in all directions	12.3	2.4				10.0
Not enough demand	21.5	10.1	20.0	24.2	19.2	20.0
Not suitable for specific type of business	13.2	35.3	40.4	15.0		37.8
Competition from Supermarkets/Planned Centres	1.9	6.5				
Other/non-specific disadvantages	24.2	12.7	28.2	37.7	9.8	19.3
No disadvantages	7.6	1.9	20.8		19.6	15.3
No information	2.3	3.6	-	7.7	-	4.0
Base	564	1018	106	72	110	268

NOTE: Percentages do not add up to 100 since respondents gave more than one answer.

TABLE LVI (Contd.)

Disadvantages in Suburbs.	Detailed location of firm.						
	Warwick/Berea/ Umbilo/Old Borough	Central Lower	Central Upper	Northern Lower	Northern Upper	Western	Southern
No passing trade	33.0	7.1	6.5	82.4	15.6	62.5	23.7
People have more confidence in town/prefer town	10.0	11.0	19.5	7.3	9.6	4.3	2.4
Serve one area only	17.8	.2	13.2		2.9	25.8	22.6
Far from suppliers/ wholesalers	5.1	3.2			7.6	2.1	3.1
Distance from town/necessary to operate in all directions	5.1				7.6	4.5	
Not enough demand	10.3	8.8	6.5		2.9	8.7	7.3
Not suitable for specific type of business	13.9	7.5					2.4
Competition from Supermarkets/Planned Centres	3.6	7.0	6.5	82.4	44.7	13.9	20,8
Other/non-specific disadvantages	12.9	30.8	14.8	17.6	18.9	37.5	22.9
No disadvantages	8.7	41.0	41.2		17.9	7.5	30.0
No information	2.6	2.5	-		1.4	-	-
Base	193	411	158	71	96	346	661

TABLE LVI (Contd.)

Disadvantages in Suburbs.	Detailed location of firm.							Total
	Queensburgh	Amanzimtoti etc.	Pinetown	Westville	New Germany etc.	Umhlanga etc.	No Inf.	
No passing trade		16.7	8.0			17.1	-	25.6
People have more confidence in town/prefer town	23.4	7.7					-	13.5
Serve one area only							-	12.3
Far from suppliers/ wholesalers	46.7	24.1	1.5				-	3.2
Distance from town/necessary to operate in all directions		6.0					-	3.6
Not enough demand		12.0			18.9	16.0	-	11.5
Not suitable for specific type of business		4.6					-	14.8
Competition from Supermarkets/Planned Centres		7.7					-	9.3
Other/non-specific disadvantages	12.0	13.9			50.6	27.1	-	20.6
No disadvantages	41.3	24.1	20.2		24.7	33.5	-	16.4
No information	-	-	70.3	100	24.7	21.7	-	4.9
Base	36	171	130	31	42	48		528

TABLE LVII

Percentage distribution of Firms according to advantages perceived in suburban location by race of owner.

Advantages in Suburbs	Race of Owner.			
	White	Indian	Coloured	Total
Easy to own premises	1.1			.6
Regular Customers	16.1	37.9	82.3	27.4
Lower Rentals/Higher Profits	19.6	2.5		11.2
Well suited for specific type of business	4.8	9.6		7.0
Easy parking	26.3	2.8		14.8
Near concentration of working population	-	1.9		.9
Near concentration of residential population	9.9	4.4		7.2
Accessible to Non-Whites	-	2.5		1.2
Planned Centre - Advantages	3.5	3.8		3.6
Other Advantages/Non-specific Advantage	18.6	17.9	62.1	19.0
No Advantages/Area not relevant	31.3	34.2	17.7	32,4
No information	7.9	4.1		6.0
Base	2319	2131	78	4528

NOTE: Percentages do not total 100 since more than one answer was given.

TABLE LVIII

Percentage distribution of firms according to disadvantages perceived in suburban location by race of owner.

Disadvantages in Suburbs.	Race of Owner.			
	White	Indian	Coloured	Total
No passing trade	12.4	40.2	20.3	25.6
People have more confidence in town/prefer town	14.8	12.6		13.5
Serve one area only	8.0	15.1	62.1	12.3
Far from wholesalers/ suppliers	4.7	1.7		3.2
Distance from town/necessary to operate in all directions	5.3	1.9		3.6
Not enough demand	12.8	10.1	11.2	11.5
Not suitable for specific type of business	11.2	19.2		14.8
Competition from Supermarkets/ Planned centres	5.8	11.2	62.1	9.3
Other/Non-specific disadvantages	23.2	18.2		20.6
No disadvantage	21.8	11.1		16.4
No information	6.7	3.0	6.5	4.9
Base	2319	2131	78	4528

NOTE: Percentages do not add up to 100 since more than one answer was given.

TABLE LIX

Percentage Distribution of Reasons for choosing to establish a Firm in a Planned Centre among Firms in Particular Planned Centres.

Reasons for choosing a Planned Centre.	Particular Planned Centre.						Total
	Mutual Beach	Davenport	Musgrave	Glenwood	Durban North	Umhlanga Rocks	
Parking facilities/Convenient for customers				20.0	20.0		5.1
Future favourable/Popularity will increase	27.3	40.0	33.3	60.0	20.0	28.6	33.3
Decentralisation of Branch/Firm necessary		40.0			20.0		7.7
Need to keep up with progressive developments				20.0		14.3	5.1
P/C located in favourable area/area determined choice/suitable premises in area	36.4	40.0	33.3			14.3	23.1
Offered suitable premises in P/C/ Only suitable premises available	18.2		16.7		20.0	14.3	12.8
Passing trade/Customers drawn by other shops/services	27.3	20.0				28.6	15.4
Less competition/one shop of a type		20.0		20.0	20.0	14.3	10.3
Lower rentals/more suitable accom. in P/C		20.0		20.0			5.1
Took over existing business			16.7				2.6
Location convenient for owner/ staff			16.7		20.0		5.1
Other	18.2		16.7				7.7
Not applicable							–
No information	9.1		16.7			28.6	10.3
Total	137	180	150	140	120	143	144
Base	31	14	17	14	14	20	110

Note: Answers do not add up to 100 since more than one answer could be given.

TABLE LX

Percentage Distribution of Reasons for choosing a particular Planned Centre among Firms in different Planned Centres.

Reasons for choosing particular Planned Centre.	Particular Planned Centre.						Total
	Mutual Beach	Davenport	Musgrave	Glenwood	Durban North	Umhlanga Rocks	
Took over established business			16.7			14.3	5.1
Only suitable premises available	18.2		16.7	40.0	40.0	57.1	28.2
P/C designed for specific type of shop						14.3	2.6
Premises suitable/street frontage/corner site/near entrance	36.4	20.0		20.0		42.9	23.1
Only P/C with vacancies		20.0	16.7				5.1
Attractions of Area - Dense/Flat Area	27.3	20.0		20.0	20.0		15.4
- High Income Area							-
- Large Customer Catchment	9.1		16.7	20.0			7.7
- Generally favourable/perm. cust./good future/adequate demand	18.2	20.0	16.7				10.3
Area convenient for owner/staff	18.2	40.0	16.7			14.3	15.4
Attractions of other shops		40.0	16.7				7.7
Area convenient for suppliers/customers	9.1	20.0					5.1
Other	9.1			20.0	20.0	14.3	10.3
Not applicable							-
No information			16.7		40.0		7.7
Total	146	180	134	120	120	157	144
Base	31	14	17	14	14	20	110

Note: Answers do not add up to 100 since more than one answer could be given.

TABLE LXI

Percentage Distribution of Firms in terms of Main Reasons for Location at their present position according to whether or not they have ever moved, and whether or not they are presently located in a Planned Centre, by Type of Firm.

Main Reasons for present Location	Type of Firm according to whether moved or not and whether situated in a Planned Centre.									
	NOT MOVED									
	P/S	P/S in P.C.	Conv.	Conv. in P.C.	Dur.	Dur. in P.C.	L/Var.	L/Var. in P.C.	Markets	Total
Presence of passing trade	14.3	50.0	19.2	30.0	24.4	5.3	12.4		11.1	19.8
Residential population concentration nearby	2.0	50.0	6.2	20.0	2.9	63.2	6.2	50.0		5.4
Working population concentration nearby	4.1		1.1		2.9					1.9
Accessible to roads/bus service/ generally centrally situated	19.6		4.2		16.1		12.4		18.5	10.5
Near to places which attract people e.g. market/beach/cinema			1.4		.8		12.4			1.0
Access for deliveries from S.A.R./ Wholesalers/Docks			1.1		3.0					1.5
Parking facilities			1.7		1.4		3.7	50.0		1.4
Presence of other shopping attractions	8.3		5.7	10.0	4.1	10.5				5.2
Recognized Centre for product			.6		3.7					1.5
Large customer catchment area/wide area served	1.2		.6		.9					.7
Station nearby					2.1					.7
Took over existing business	19.2		20.9	10.0	13.2	5.3	3.1		33.3	18.3
Attractions of particular race groups			2.5		2.4		4.0		3.7	2.2
Near to potential customers of a particular type	4.1		2.7		3.5		31.9		3.7	3.4
Near Respondent's home/near Main Branch	9.5		16.1		13.2	10.5	4.0			13.3
Other reasons	8.4		10.1	10.0	3.5	5.3	3.7		18.5	8.0
Not applicable			.6		1.3					.7
No information	9.1		5.5	20.0	.4		6.2		11.1	4.5
Total	100	100	100	100	100	100	100	100	100	100
Base	426	6	1801	28	1229	53	24	6	184	3757

TABLE LXI (Contd.)

Main Reasons for present Location	Type of Firm according to whether moved or not and whether situated in a Planned Centre.									
					MOVED					
	P/S	P/S in P.C.	Conv.	Conv. in P.C.	Dur.	Dur. in P.C.	L/Var.	L/Var. in P.C.	Markets	Total
Presence of passing trade	10.9		15.4	100	17.3					15.0
Residential population concentration nearby	2.5		15.8		4.4					6.8
Working population concentration nearby										-
Accessible to roads/bus service/ generally centrally situated	14.1				23.3				100	15.0
Near to places which attract people e.g. market/beach/cinema										-
Access for deliveries from S.A.R./ Wholesalers/Docks					5.6					2.6
Parking facilities	4.7				3.5					2.7
Presence of other shopping attractions			10.1							2.7
Recognized Centre for product					6.2					2.8
Large customer catchment area/wide area served		50.0			1.6					1.1
Station nearby										-
Took over existing business	10.9		20.1		5.2					10.3
Attractions of particular race groups										-
Near to potential customers of a particular type	2.5				5.0	33.3				3.3
Near Respondent's home/near Main Branch	8.4	50.0			2.2					3.4
Other reasons	33.1		5.0		15.2	33.3	100.0			17.1
Not applicable			5.0							1.3
No information	12.8		28.5		7.5	33.3				14.4
Total	100	100	100	100	100	100	100	-	100	100
Base	185	6	205	3	355	8	4		7	772

TABLE LXII

Schedule of Selected Characteristics of Firms in Planned Centres.

Planned Centres	Mean Total Floorspace - sq. ft.	Mean Sales Area - sq. ft.	Proportion of Sales Area to Whole	Proportion of Customers White	Indian/Coloured	Bantu
Mutual Beach	2437	1656	68%	90.0	2.3	7.8
Davenport	1036	800	77%	92.6	1.8	5.6
Glenwood	1410	1295	92%	97.4	.4	2.2
Musgrave	1280	843	66%	96.0	1.1	2.8
Durban North	4850	3090	64%	97.5	1.0	1.5
Umhlanga Rocks	1057	573	54%	83.6	5.9	10.6
All Centres	2009	1364	68%	92.0	2.3	5.7

Mean Value of Sales at 1965/66 for all Centres = R68,990 (Based on 40% of cases.)

Mean Value of Sales per sq. ft. for 40% of cases = R20.59.

TABLE LXIII

Percentage Distribution of Advantages existing in Planned Centres by Firms grouped according to Particular Planned Centres.

Advantages in a Planned Centre.	Particular Planned Centres.						Total
	Mutual Beach	Davenport	Musgrave	Glenwood	Durban North	Umhlanga Rocks	
Customers attracted to variety/ concentration	90.9	80.0	83.3	60.0	80.0	57.1	76.9
Near to customer concentrations/ less driving	18.2		16.7			14.3	10.3
Protected/Compact/less walking for old people/mothers/other customer	18.2		33.3	20.0	20.0		15.4
Ease of parking/planned parking	18.2	40.0	16.7	20.0	20.0	42.9	25.6
One type of shop per centre/less competition				20.0		14.3	5.1
Customers encouraged to walk around - impulse buying						14.3	2.6
Opportunity for co-operation between shops		20.0					2.6
Presence of Banks, P.O. etc., stimulate business							-
Premises well designed and suitable/ lower rentals				20.0			2.6
Other advantages					20.0		2.6
No advantages	9.1						2.6
Not applicable							-
No information			16.7			14.3	5.1
Total	155	140	167	140	140	157	151
Base	31	14	17	14	14	20	110

Note: Answers do not add up to 100 since more than one answer could be given.

TABLE LXIV

Percentage Distribution of Disadvantages existing in Planned Centres by Firms grouped according to Particular Planned Centres.

Disadvantages in a Planned Centre.	Particular Planned Centres.						Total
	Mutual Beach	Davenport	Musgrave	Glenwood	Durban North	Umhlanga Rocks	
High Rentals		20.0					2.6
Remote from Head Office, Suppliers, Town		40.0					5.1
Shops do not carry full range, people disappointed		20.0					2.6
Lack of support from office workers, passing trade in C.B.D.							-
Cars of flat residents and houses occupy parking spaces	9.1						2.6
Do not carry full range of shops in beginning				40.0	20.0	14.3	10.3
Have an expensive image							-
People not accustomed to decentralised shopping	9.1	20.0					5.1
Too near to competition from C.B.D.							-
Other disadvantages		20.0					2.6
No disadvantages	81.8	40.0	83.3	60.0	100.0	85.7	76.9
Not applicable							-
No information			16.7				2.6
Total	100	160	100	100	120	100	110
Base	31	14	17	14	14	20	110

Note: Answers do not add up to 100 since more than one answer could be given.

TABLE LXV

Percentage Distribution of Satisfactions with Present Site and Premises among Firms in Particular Planned Centres.

Satisfactions about Present Site/ Premises.	Particular Planned Centres.						Total
	Mutual Beach	Davenport	Musgrave	Glenwood	Durban North	Umhlanga Rocks	
Centrally situated			16.7				2.6
Easily accessible	9.1	40.0		40.0			12.8
Low Rentals/overheads							-
Own premises							-
Resident in the area							-
Near residential population/ regular customers	36.4	20.0	33.3	60.0	20.0	14.3	30.8
Near working population							-
Suitable premises	36.4	40.0	33.3	40.0	40.0	71.4	43.6
Passing trade	18.2		16.7		20.0		10.3
No great competition			33.3				5.1
Easy deliveries from Wholesalers/ S.A.R.		20.0					2.6
Parking facilities	36.4		16.7	20.0	20.0	28.6	23.1
Near places which attract people e.g. cinemas, beaches	9.1						2.6
Supported by Non-Whites							-
Other satisfactions/non-specific satisfactions	9.1	20.0			20.0		7.7
No satisfactions							-
No information							-
Total	155	140	150	160	120	114	141
Base	31	14	17	14	14	20	110

Note: Answers do not add up to 100 since more than one answer could be given.

TABLE LXVI

Percentage Distribution of Dissatisfactions with Present Site and Premises among Firms in Particular Planned Centres.

Dissatisfactions about Present Site/Premises	Particular Planned Centres.						Total
	Mutual Beach	Davenport	Musgrave	Glenwood	Durban North	Umhlanga Rocks	
Premises too small			33.3		20.0		7.7
No room to expand			16.7				2.6
Competition too great							-
High rental					20.0	14.3	5.1
Lack of parking/lack of loading/ unloading facilities							-
No passing trade							-
Area declared White							-
Area too quiet	9.1			20.0			5.1
Business seasonal							-
Premises not suitable	9.1						2.6
Complaints about area	9.1	40.0		20.0			10.3
Group Areas difficulties							-
Other dissatisfactions/non-specific dissatisfactions	18.2	40.0	16.7	20.0	20.0	14.3	20.5
No dissatisfactions	54.5	20.0	50.0	40.0	40.0	71.4	48.7
No information							-
Total	100	100	117	100	100	100	103
Base	31	14	17	14	14	20	110

Note: Answers do not add up to 100 since more than one answer could be given.

TABLE LXVII

Percentage Distribution of Places and Areas where tenants in Planned Centres felt that such Centres would be most successful.

Where Planned Centres are likely to be most Successful.	Particular Planned Centres.						Total
	Mutual Beach	Davenport	Musgrave	Glenwood	Durban North	Umhlanga Rocks	
Dense, Flat Areas	9.1	20.0			20.0	14.3	10.3
New fast-growing areas		20.0				14.3	5.1
Lower socio-economic areas with few cars	9.1	20.0				28.6	10.3
In rich, high S.E.S. areas					20.0	14.3	5.1
In suburbs - far from competing Central Business District	63.6	60.0	33.3	60.0	60.0	42.9	53.8
In areas geographically distinct				20.0			2.6
In comfortably-off, stable areas							-
Where planned as integral part of Community		20.0					2.6
Where transport is tedious, difficult							-
Areas of large population	27.3		16.7	20.0	20.0		15.4
Other areas/comments				20.0		14.3	5.1
Nowhere							-
No information			50.0	20.0	20.0	14.3	15.4
Total	109	140	100	140	140	143	126
Base	31	14	17	14	14	20	110

Note: Percentages do not add up to 100 since more than one answer could be given.

TABLE LXVIII

Percentage Distribution of Opinions regarding the future of Planned Centres expressed by Tenants in different Planned Centres.

The Future of Planned Centres.	Particular Planned Centres.						Total
	Mutual Beach	Davenport	Musgrave	Glenwood	Durban North	Umhlanga Rocks	
Good/Excellent	54.5	60.0	66.7	20.0	60.0	42.9	51.3
Good, once people are accustomed	36.4	20.0	16.7	80.0	40.0	42.9	38.5
Only if well away from competing Central Business District							-
If type of goods suit area							-
Solution to parking, traffic, other congestion	18.2	40.0	16.7	20.0	40.0	42.9	28.2
If they advertise and promote - no passing trade		20.0					2.6
Other reasons/qualifications for good future	9.1	20.0	16.7	20.0			10.3
Limited, poor future							-
Reasons/qualifications for poor future							-
Other	9.1						2.6
Not applicable							-
No information			16.7			14.3	5.1
Total	127	160	134	140	140	143	139
Base	31	14	17	14	14	20	110

Note: Percentages do not add up to 100 since more than one answer could be given.

TABLE LXIX

Percentage Distribution of Estimated Future Value of Sales in the different Planned Centres.

Estimated Future Total Value of Sales/Services as a Percentage of Present Turnover.	Particular Planned Centres.							
	Mutual Beach		Davenport		Musgrave		Glenwood	
	1967/68	1970/71	1967/68	1970/71	1967/68	1970/71	1967/68	1970/71
Can't say/Don't know	9.1	9.1			16.7	16.7	20.0	40.0
80% or below								
81 - 89								
90 - 99								
100% or steady					16.7	16.7	20.0	
101 - 104					16.7			
105 - 109	9.1					16.7		
110 - 114		9.1			33.3		20.0	20.0
115 - 119	18.2	9.1						20.0
120 - 124	9.1		20.0		16.7			
125 - 129	9.1	9.1						
130 - 144				20.0				
145 - 159	27.3	9.1	40.0			33.3	20.0	
160 - 174								
175 - 204	9.1	36.4	20.0	60.0		16.7		20.0
205 - 234								
235% and over	9.1	18.2	20.0	20.0			20.0	
Increase								
Decrease								
Total	100	100	100	100	100	100	100	100
Base	31		14		17		14	
Mean	148.7	176.7	173.0	191.0	109.8	140.3	153.4	139.5[1]

1] Lower figure due to high non-response.

TABLE LXIX (Contd.)

Estimated Future Total Value of Sales/Services as a Percentage of Present Turnover.	Particular Planned Centres.				Total	
	Durban North		Umhlanga Rocks			
	1967/68	1970/71	1967/68	1970/71	1967/68	1970/71
Can't say/Don't know				14.3	7.7	12.8
80% or below					-	-
81 - 89					-	-
90 - 99					-	-
100% or steady	20.0	20.0	14.3	14.3	10.3	7.7
101 - 104					2.6	-
105 - 109					2.6	2.6
110 - 114	60.0				15.4	5.1
115 - 119					5.1	5.1
120 - 124		20.0	28.6		12.8	2.6
125 - 129					2.6	2.6
130 - 144		20.0	14.3	14.3	2.6	7.7
145 - 159	20.0		28.6		23.1	7.7
160 - 174				28.6	-	5.1
175 - 204		40.0	14.3		7.7	28.2
205 - 234					-	-
235% and over				28.6	7.7	12.8
Increase					-	-
Decrease					-	-
Total	100	100	100	100	100	100
Base	14		20		110	
Mean	117.6	147.6	139.4	178.5	141.2	166.0

APPENDIX B.

Details of Sample Stratification Employed. Number of Cases per Stratum, Non Responses, and Weighting Factors.

Stratum Description	Sample Size, No. Drawn	No. Coded	Refusals and not available for Interviewing.	Not Applicable Not in business	Weighting Factor.
CBD/White/Personal Service	31	25	4	2	08.7
CBD/White/Convenience	32	28	2	2	10.8
CBD/White/Small Durable	49	37	2	10	10.6
CBD/White/Large Durable	41	31	4	6	05.5
CBD/White/Large Variety	7	7	-	-	02.0
CBD/Indian/Personal Service	13	13	-	-	15.2
CBD/Indian/Convenience	12	11	-	1	19.7
CBD/Indian/Durable	18	15	2	1	29.4
Central/Large clusters/White/Pers. Service	7	5	-	2	04.7
Central/Small clusters/White/Pers. Service	6	5	-	1	05.0
Central/Large clusters/White/Convenience	14	9	2	3	12.1
Central/Small clusters/White/Convenience	19	18	-	1	10.3
Central/Large clusters/White/Durables	17	11	-	6	09.9
Central/Small clusters/White/Durables	9	6	-	3	07.0
Central/Indian/Personal Service	6	6	-	-	0.50
Central/Large clusters/Indian/Convenience	7	7	-	-	14.0
Central/Small clusters/Indian/Convenience	4	4	-	-	06.5
Central/Indian/Durables	6	6	-	-	10.0
Central/Indian/Large Variety	1	1	-	-	01.0

Stratum Description	Sample Size, No. Drawn	No. Coded	Refusals and not available for interviewing.	Not applicable Not in business	Weighting Factor.
Rest of Mun. Area/White/Personal Service	9	7	1	1	05.2
Rest of Mun. Area/White/Convenience	23	18	1	4	10.3
Rest of Mun. Area/White/Durables	19	15	-	4	07.3
Rest of Mun. Area/White/Large Variety	4	4	-	-	01.25
Rest of Mun. Area/Indian/Personal Service	7	5	-	2	15.0
Rest of Mun. Area/Indian/Convenience	14	13		1	48.1
Rest of Mun. Area/Indian/Durables	10	8		2	15.7
Perimeter/White and Indian/Personal Service	9	7	1	1	05.3
Perimeter/White and Indian/Convenience	35	26	2	7	10.3
Perimeter/White and Indian/Durables	23	17	-	6	07.9
Perimeter/White and Indian/Large Variety	3	3	-	-	02.0
African Outlets	19	11	4	4	N.A. (See Notes.)
White Market	9	3	2	4	06.9
Indian Market	25	25			06.8
Planned Centres	40	39	1	-	02.8
TOTAL	548	446	28	74	

NOTES :

1. In certain strata the figures quoted in the table above, do not agree with the actual number of sample cases coded into categories corresponding to the stratum divisions. In this regard it should be noted that cinemas were not coded and processed with the bulk of the data but were kept aside and are discussed separately in the text of the report. In two cases firms were sampled in particular stratum but had to be coded in different categories when more information was available from the interview results.

2. The African owned establishments are not included in the tabulated data but, like the cinemas, are discussed separately in the text. This was due to the difficulties encountered in obtaining complete information from these respondents.

3. The large and small clusters referred to in the table above refer to clusters of adjacent shops of 16 or more or 15 and fewer respectively.

4. The weighting factor presented in the last column is based on the sampling fraction corrected to compensate for losses due to refusals and respondents who were not available for interviewing. In the computer processing of the data all cases were multiplied by the appropriate weighting factor before tabulation, and the results therefore represent estimates of the characteristics in the universe from which the sample is drawn.

A P P E N D I X   C.

EXAMPLES OF COVERING LETTER. QUESTIONNAIRE AND SCHEDULE.

1. Covering Letter.
2. Questionnaire.
3. Schedule used by Interviewers.

NOTE:

The examples shown below are the forms used for retail outlets only. The forms used for personal services are identical in content and are distinguished only by minor alterations in wording.

CITY of DURBAN
STAD DURBAN

Central Durban Planning Project
Beplanningsprojek Durban Sentraal
Professor Lord Holford
Professor R.H. Kantorowich
Joint Planning Consultants

City Engineer's Department
Old Fort Road P.O. Box 680
Telephone: 69946 Ext.
File Reference:

Dear Sir/Madam,

re: PLANNING STUDY:- RETAIL TRADE IN METROPOLITAN DURBAN

The Durban City Council has retained Professor Lord Holford of London University and Professor R.H. Kantorowich of Manchester University, to advise upon the planning of Durban's future urban development.

We are naturally anxious that the City should develop and expand without the problems of extreme congestion and poor services (now besetting so many major cities), to the long term advantage of Commercial and Industrial interests in Durban.

Effective Town Planning must be based not only on realistic estimations of future needs, but also upon accurate details on present and past growth trends. To this end, the Town Planning Consultants have commissioned a variety of research projects. Crucial among these is a study of retail trading patterns which the Institute for Social Research at the University of Natal has been commissioned to undertake in order to assess the requirements of Retail Traders in Metropolitan Durban over the next 15 years.

Your premises have been selected in a scientific probability sample of retail trade establishments. The vital information we require is indicated in a questionnaire which is enclosed for completion by you. A member of the Research Team will call to see you shortly, on appointment, to collect this questionnaire and to obtain some additional information.

We, of the Chamber of Commerce, the University, the City and its Planning Consultants, appeal earnestly for your full co-operation in completing the questionnaire and in granting a subsequent interview. Every questionnaire and every item of information requested is essential for estimating the future space requirements of commerce in Durban. The material collected is treated in the strictest confidence, and individual questionnaires will all be combined in an analysis by computer. Only the members of the University Research Team will handle individual questionnaires. The final statistics will be strictly confidential and only the Town Planning Consultants will have access to it.

We trust that you will give of your valuable time in assisting us with this important undertaking.

Yours sincerely,

(Signed) H. JOHNSTON
President.
Durban Chamber of Commerce.

(Signed) G. HANDS
City Engineer.
City of Durban.

(Signed) H.L. WATTS
Director
Institute for Social Research,
University of Natal.

(Signed) I. HOLFORD
Professor Lord Holford
Joint Planning Consultant
Central Durban Planning Project.

N.B. All enquiries should be directed to the Institute for Social Research, University of Natal, (Tel. 359852)

INSTITUTE FOR SOCIAL RESEARCH

UNIVERSITY OF NATAL

DURBAN

NOTE: THIS QUESTIONNAIRE IS TO BE COMPLETED ONLY FOR RETAIL ESTABLISHMENTS, PAWNBROKERS, CAFE'S, RESTAURANTS, OR MILK BARS, AND WHOLESALE, INDUSTRIAL AND SERVICE ESTABLISHMENTS WHICH HAVE RETAIL DEPARTMENTS.

ANSWERS SHOULD CONCERN ONLY RETAIL, PAWNING AND CATERING ACTIVITIES, AND NOT REPAIRS OR SERVICE ACTIVITIES LIKE DRYCLEANING, MOTOR REPAIRS, ETC.

A SEPARATE QUESTIONNAIRE IS SUPPLIED FOR PERSONAL SERVICE ESTABLISHMENTS (HAIRDRESSERS, MASSEURS, ETC.)

No. ....

STRICTLY CONFIDENTIAL:

Would you complete the following questionnaire as fully and as accurately as you can. A member of the research team will make an appointment shortly to collect the questionnaire and to discuss certain additional aspects with a senior member of the firm. Assistance in this matter will be greatly valued.

NAME OF FIRM: ....

ADDRESS: ....

....

Q.1. Please tick the ownership category which applies to this firm:

Individual owner	☐
Partnership	☐
Public company	☐
Private company	☐
Co-operative	☐
Other	☐

Q.2. We would like full details on the categories of goods sold in this firm/branch. Please read through the following list and tick categories of commodities in which this firm deals. The commodities are presented under headings for your convenience, but we would like you to tick individual items.

FOOD SALES:

- Milk & Dairy products
- Meat & Fish ....
- Bread & Cake ....
- Eggs & Poultry ......
- Fruits & Vegetables .
- Groceries ....
- Sweets & Ice Cream ..
- Grain & Agricultural produce .....

CATERING & SERVING:

- Hot or cold meals ...
- Snacks ....
- Beverages ....
- Take-away foods .....
- Outside Catering ....
- Wines & Malts ....
- All liquor ....

CLOTHING:

- Outfitters - mens & boys ......
- Outfitters - womens & girls .....
- Haberdashery ....
- Footwear ....
- Second-hand clothing
- Dress materials .....

MACHINERY:

- Machinery - gardening & homecrafts .....
- Machinery - office & professional ...
- Machinery - Industrial

FURNITURE & APPLIANCES:

- New furniture ....
- Second-hand furniture
- Office furniture .....
- Household electrical appliances ......
- Other household appliances ......

HARDWARE:

- Paints ....
- Wallpapers ....
- Hardware - small tools .....
- Timber ....
- Other builders supplies (bricks, cement, etc.) ......

DRINK SALES:

- Liquor ....
- Minerals & beverages

VEHICLES:

- Cycles, prams, tricycles etc. ....
- Motor cycles ....
- Cars (new) ....
- Cars (second-hand) ...
- Other vehicles (boats)
- Tractors, trailers, etc. ....
- Motor spares & Acc. ..

HOUSEHOLD GOODS:

- Glass, pottery, crockery ....
- Pots, pans, cutlery ..
- Household furnishing & textiles (table cloths, carpets, bedding etc.) ......

TRAVEL & RECREATION GOODS:

- Travel & leather goods
- Canvas goods ....
- Sports & fishing requisites ....
- Photographic & optical equipment ....

BOOKS & RECORDS:

- New books ....
- Second-hand books ....
- Records ....
- Stationery ....
- Newspapers ....
- Magazines ....

FUEL:

- Wood, coal & coke ....
- Petrol & oil ....

MEDICINES, TOILETRIES & SOAPS:

- Cleaning materials & toilet requisites .
- Cosmetics ....
- Patent medicines .....
- Drugs ....

Q.2. continued.

PERSONAL GOODS: [ ]

Antiques & curios .... [ ]
Novelties, toys & Musical instruments [ ]
Jewellery & Silver-ware .... [ ]
Watches .... [ ]
Cigarettes & tobacco [ ]
Flowers, plants & seeds ...... [ ]
Pets & animals ...... [ ]

PAWNING ACTIVITY: [ ]

* * * * *

Q.3. Please give details of the present floor space in sq. ft., in your firm/branch on these premises for the following:

SQ. FT. AREA OF WHOLE PREMISES, INCLUDING STORAGE ......

SQ. FT. AREA DEVOTED TO SALES (excluding where possible administration, storage, repairing, staff facilities, etc.) ....

* * * * *

Q.4. Please try to give details of the floor space of this firm/branch at all addresses irrespective of moves, for the following financial years. CROSS OUT YEARS IF FIRM DID NOT EXIST.

YEARS	WHOLE FIRM:	SALES AREA:
1951/52	....	....
1958/59	....	....
1960/61	....	....
1962/63	....	....
1964/65	....	....

* * * * *

Q.5. Is this establishment the only branch of the firm in the Durban/Pinetown area (tick) Yes .... No ....

[IF NO] How many branches exist in the Durban/Pinetown area? ....

Is this a main or a subsidiary branch (tick) Main ...
Subsidiary ...

* * * * *

Q.6. During what year was this firm/branch first established at its present location? ....

* * * * *

Q.7. Please state previous addresses if any, of this firm/branch and the year in which the firm was first located at each previous address:

ADDRESS:	YEAR LOCATED
1.	....
2.	....
3.	....
4.	....
5.	....
6.	....
7.	....

* * * * *

Q.8. Please mention the buying groups to which this firm/branch is affiliated, if any. (Spar, Sentrakoop, etc.)

BUYING GROUPS - specify: ....
....
....

* * * * *

Q.9. Please furnish details of the number of employees (including owner/managers) in this firm/branch for the present, for July, 1963, and for September 1960.

MALE:	Number Present	1963	1960	FEMALE:	Number Present	1963	1960
White ..				White ..			
Coloured				Coloured			
Asiatic				Asiatic			
Bantu .				Bantu .			

* * * * *

Q.10. Do you have self-service facilities in this firm/ Branch?

YES ....   NO ....

* * * * *

Q.11. We urgently require information on the total value of your sales for the financial year 1965/66. Like all else this will be held in strictest confidence. We DO NOT want to know the value of sales in EXACT amounts. You may indicate as follows:

If the value of your sales is:	Round to the nearest:
a] under R10,000	a] R1,000
b] between R10,000 and R200,000	b] R10,000
c] R200,000 or more	c] R50,000

Q.11. Continued.

<u>for example</u>: R7,480 would become R7,000.
R37,110 becomes R40,000 and
R330,000 becomes R350,000.

N.B.: <u>If total value of sales cannot be given for 1965/66 please state amounts for the financial year 1964/65</u>

TOTAL VALUE OF SALES (all commodities) 1965/66: R ....
(1964/65 = R ....)

* * * * *

Q.12. We need some indication of the past growth of this firm/branch in value of sales. Would you indicate in broad amounts how much the value of sales has risen or fallen in total, over the periods specified: CROSS OUT PERIODS BEFORE THE FIRM/BRANCH WAS ESTABLISHED.

<u>FINANCIAL YEAR TO FINANCIAL YEAR</u>:

1951/52 - 1958/59 rose R .... : Fell R ....
1958/59 - 1960/61 rose R .... : Fell R ....
1960/61 - 1962/63 rose R .... : Fell R ....
1962/63 - 1963/64 rose R .... : Fell R ....
1963/64 - 1964/65 rose R .... : Fell R ....
1964/65 - 1965/66 rose R .... Fell R ....

* * * * *

Q.13. <u>N.B.</u>: <u>ANSWER ONLY IF YOUR FIRM DEALS IN MORE THAN ONE OF THE CATEGORIES OF GOODS LISTED BELOW:</u>

We would like some indication of the proportion of the total that your sales for different types of goods are: Would you give the percentage (i.e. 30%; 55%, etc.) or the fraction (i.e. 1/6th or 1/12th etc.) of the total which the sales (for types of goods mentioned below which you sell) amounted to: in the 1965/66 financial year. (if latest figures are not available, give proportions for 1964/65):

TYPE OF GOODS	Proportion of total sales - 1965/66	1964/65
<u>FRESH FOODS</u>: Meat & Fish Eggs, milk, butter, cheese, etc. Fruit & vegetables		
<u>SHELF FOODS</u>: Groceries, tinned foods, and other packaged provisions		
Liquor and minerals		
Serving meals, snacks, beverages		
Serving Liquor		
Outside catering		

Q. 13. Continued.

TYPE OF GOODS	Proportion of total sales - 1965/66	1964/65
Sweets, ice cream, tobacco, cigarettes		
AGRICULTURAL PRODUCE: Grains, legumes, skins, animal feeds		
Flowers, seeds, plants, pets, animals		
Textile and household furnishings (soft goods, not clothing)		
Clothing, footwear, haberdashery		
Jewellery, silverware, watches, pottery		
Household supplies (crockery, china, glassware)		
New and used furniture		
Art and curios		
Electrical and non-electrical household appliances		
Soaps, toilet requisites, cleaning materials		
Patent medicines		
Drugs		
Photographic and optical goods		
Books, magazines, newspapers, stationery and records		
Recreation and sports goods		
Musical instruments		
Toys and novelties		
Leather goods		
Coke, coal, firewood		
Fuel, petrol, oil, paraffin		
VEHICLES: New cars, trucks, motor cycles, second-hand vehicles, other vehicles, etc.		
Spares and accessories		
Building materials (sand, timbers, cement, etc.)		

Q.13. Continued.

TYPE OF GOODS	Proportion of total sales - 1965/66	1964/65
Tools, hardware, implements, paints, wallpaper		
Fertilizers, chemicals, disinfectants, insecticides		
Heavy machinery		
Office and professional equipment		
Gardening machinery, mowers, etc.		
METAL & METAL PRODUCTS: Pig Iron, castings, fencing material		
Packing materials and containers		
Pawning activity		

* * * * *

Q.14. [TO PERSON COMPLETING QUESTIONNAIRE]

Could you please state your position in the firm:

....

FOR OFFICE USE ONLY:

No. .... GROUP: ....

Sector: ....

Concentration: ....

Stratum: ....

No. ....

CHECKED
APPROVED
EDITED
CODED
SPECIAL

INSTITUTE FOR SOCIAL RESEARCH

RETAIL AND PERSONAL SERVICES PLANNING STUDY.

RETAIL OUTLETS SCHEDULE.

* * * * *

NAME OF FIRM ....

ADDRESS .... TEL. ....

STRATUM

RESPONDENT: OWNER
MANAGER
EXECUTIVE SPEC...............

....

APPOINTMENTS: 1. ....

2. ....

3. ....

4. ....

CALL	DATE	TIME OF DAY	DURATION	OUTCOME
1st				
2nd				
3rd				
4th				
5th				
6th				

N.B. CONDUCT INTERVIEW WITH OWNER OR MANAGER ONLY, EXCEPT IN THE CASE OF VERY LARGE FIRMS WHERE SENIOR EXECUTIVES CAN BE INTERVIEWED. NEVER INTERVIEW JUNIOR PERSONNEL.

SECTION A.

Check answers to questionnaire with particular reference to the following: (Write any comments or answers on questionnaire or correct answers where necessary.)

Q.3. and Q.4. If exact details of floorspace have been omitted ask for permission to take quick measurements.

Q.6. and Q.7. Remind respondent that a change from one floor or position in a building to another constitutues a change of location.

Q.9. As a last resort obtain estimates of employment in previous years if exact figures cannot be given.

Q.11. If respondent considered classes of sales value too narrow and consequently did not answer, ask for answers in broader categories,

e.g. round to nearest R 5,000 instead of R 1,000.
round to nearest R25,000 instead of R10,000.
round to R100,000 instead of R50,000.

Specify categories used.

If information cannot be furnished ask for <u>estimates</u>. Note that figures are <u>estimates</u>.

Establish financial year answered for and note clearly.

Q.12. If information cannot be furnished in detail ask for <u>estimates</u>. Note that figures are estimates.

Q.13. If information cannot be furnished in detail, ask for <u>estimates</u>. Note that figures are estimates.

* * * * *

<u>NOTE: VERY IMPORTANT</u>. IF FIRM IS OF A TYPE WHICH SUPPLIES GOODS TO OTHER FIRMS (E.G. OFFICE EQUIPMENT SPECIALISTS, MACHINERY SALES, RAW MATERIALS, CONTAINERS, ETC.) ESTABLISH THE FOLLOWING:

PROPORTION OF TOTAL SALES FOR MOST RECENT FINANCIAL YEAR TO:

1)	PUBLIC, (at Retail prices)	%
2)	OTHER FIRMS (at Retail prices)	%
3)	OTHER FIRMS (at Wholesale prices)	%

<u>NOTE</u>: WHERE APPLICABLE ESTABLISH WHETHER FIRM IS INDEPENDENT OR A SELLING SUBSIDIARY OF A MANUFACTURER OR WHOLESALER/IMPORTER, ETC.

INDEPENDENT	
SUBSIDIARY	

* * * * *

SECTION B.

INTERVIEW SCHEDULE.

Thank respondent graciously for his co-operation in completing the questionnaire and furnishing the highly valued information.

Ask respondent for a few more minutes co-operation to try to form some assessment of future trends in his type of retail trade. Point out that the primary concern of the Institute and the City Council is not with the activities of individual firms, but with future growth trends in retail trade as they are reflected in individual firms/branches.

Q.1. Talking broadly about your present customers at this firm/branch. Roughly what proportions are:

WHITES		INDIANS	
COLOUREDS		AFRICANS	

Q.1a. (Planned Centres) What proportion of your customers do you draw from passing trade in the Centre?

Q.1b. (Planned Centres) What advantage are the presence of Banks, Post Offices, Building Societies?

Q.2. With reference to your future floorspace requirements -- Taking into account your sales trends <u>and</u> any plans for new or altered services you might have in mind. By what approximate sq. footage and at what rough future dates do you intend increasing your total square footage of floorspace? Here we are interested in definite plans you have.

Approximate date .... sq. ft. ....

Approximate date .... sq. ft. ....

Q.3. [IF YES] What will you do to gain the additional space? ....

....

....

....

....

Q.4. [IF NO] Apart from definite plans. Do you think that you might need extra floorspace at some stage? If so, roughly when and how much will you need?

....

....

....

....

Q.5. [IF YES to either 2, 3, or 4] For what type of activity would you need the additional space -- sales, administration, storage, or anything else?

....

....

.... DK ....

Q.6. [IF REQUIRED FOR SALES AND MORE THAN ONE TYPE OF COMMODITY IS SOLD] Which type of goods would require most space? ....

....

.... DK ....

Q.7. Could you tell me what commodities, if any, you intend to add to the lines of goods you sell at present, and at roughly what future dates?

CATEGORY OF GOODS ROUGH DATE.

1. ....
2. ....
3. ....
4. .... DK ....

Q.8. [IF INTENTION TO ADD] If I might ask, what are your reasons for considering these additions/this addition. [PROBE]

....

....

.... DK ....

Q.9. Which, if any, of your existing lines of goods might you discontinue in the future?

CATEGORY OF GOODS.

1. ....
2. ....
3. ....

Q.10. What changes in the service or facilities you offer customers are you contemplating, and at roughly what future dates?

CHANGES FUTURE DATES

1. ....

2. ....

3. ....

DK

Q.11. Take each of the future PLANS contemplated (Questions 8 - 11) in turn and ask:

Roughly what increases, if any, in the square footage of floorspace will .... [NAME PLAN] require?

CHANGE	INCREASE IN SQ. FT.
New Commodities	
....	
Changes in Service or Facilities	
....	

Q.12. [IF FIRM HAS NOT MOVED] What were your/your company's reasons for locating your firm/branch in this area? PROBE.

....

....

....

.... DK ....

What made you/your company choose this site/position? PROBE.

....

....

....

.... DK ....

Q.12a. (Planned Centres) What were your/your companies reasons for locating your firm in this planned centre?

....

....

....

.... DK ....

Q.13. [IF FIRM HAS MOVED] What were your/your company's reasons for moving the firm/branch from the previous address to the present locality and site/position? PROBE.

Locality ....

....

....

....

....

....

.... DK ....

Site ....

....

....

....

....

....

.... DK ....

Q.14. From the point of view of your type of business, what advantages are there in being located in each of the following 4 localities in the central area? [PROBE AND SHOW MAP]

1. [Main business area/Grey St. area] ....

....

....

....

2. [Localities surrounding main business area] including motor town. ....

....

....

....

3. [Beach front area] ....

....

....

....

4. [Berea, Umbilo, Warwick Ave. area] ....

....

....

....

Q.15. What disadvantages, from the point of view of your type of business, are there in being located in each of these 4 localities in the central area? [PROBE AND SHOW MAP]

1. [Main business area/Grey St. area] ....

....

....

....

2. [Localities surrounding main business area, including motor-town] ....

....

....

....

3. [Beach front area] ....

....

....

....

4. [Berea, Umbilo, Warwick Ave. area] ....

....

....

....

Q.16. Alternatively, what advantages for your type of business are there to being located in the suburbs? [PROBE - DEFINE SUBURBS AS ANYTHING OUTSIDE OF MAPPED AREA/AREA IN WHICH RESPONDENT'S ESTABLISHMENT IS SITUATED.]

....

....

....

Q.17. What disadvantages for your type of business are there to being located in the suburbs? [PROBE - DEFINE SUBURBS AS ABOVE. IF LACK OF PASSING TRADE IS MENTIONED, SAY, WHAT ABOUT PLANNED SHOPPING CENTRES.]

....

....

....

Q.18. (Planned Centres) Alternatively, what advantages for your type of business are there to being located in a Planned Centre as this?

....

....

....

Q.19. (Planned Centres) What disadvantages?

....

....

....

Q.20. What do you think of the future of Planned Centres?

....

....

....

Q.21. In which areas (of town) would they be most successful?

....

....

....

Q.22. Do you think there is room for more Planned Centres in this area (suburb) - how many?

....

Q.23. What things satisfy you and what things dissatisfy you about your present site and premises in the Centre? [PROBE - BEARING IN MIND DELIVERY OF SUPPLIES AS WELL AS CUSTOMERS]

<u>SATISFACTIONS</u> ....

....

....

<u>DISSATISFACTIONS</u> ....

....

.... DK ....

Q.24. Do/Does you/your company intend changing the location of this firm/branch at any stage?

YES ...... NO ...... DK ......

[IF YES] To what <u>area</u> do you intend moving and what would your reason be? PROBE.

....

....

....

.... DK ....

Q.25. We are interested in estimating future growth trends. Let us regard your present total sales value for 1965/66, (1964/65 if recent figures were not available) as 100. What would you expect the figure to be in the 1967/1968 and the 1970/71 financial year, judging from present experience? Assume that money retains the value it has at the moment.

1967/68 = 1970/71 =

Q.26. [ASK IF MORE THAN ONE CATEGORY OF GOODS IS SOLD] We are interested in sales increases or decreases in various categories of goods. Would you place the types of goods you sell in order from highest to lowest, according to how successfully sales have been increasing over the last year.

Increasing fastest 1) ....
2nd fastest 2) ....
etc. 3) ....
4) ....
5) ....
6) ....

INTERVIEWER.

THANK RESPONDENT.

* * * * *

RANK FIRM BY TICKING APPROPRIATE CATEGORIES:

SHOP:

Modern	Average	Old Fashioned ....
Clean	Average	Dirty ....
Spacious	Average	Crammed/ Cramped ....
Well arranged ..	Average	Untidy/ Cluttered ....

NAME OF BUILDING

OWNER/MANAGER.

White .... Indian ...... Coloured ...... Bantu ......

Well educated .. Average ..... Poorly educated ....

Well dressed ... Average ..... Untidy, Dirty ....

Assists in Serving .... Don't know .... Does not assist ....

FLOORSPACE: State whether floorspace area rented includes any of the following: toilets, landings, liftspace, main staircases (DESCRIBE AND SPECIFY)

....

....

....

....

IF SHOP IS NOT IN DURBAN CENTRAL, PINETOWN CENTRAL, BEREA, - UMBILO, - WARWICK AVENUE AREA, CLAIRWOOD SHOPPING CENTRE, LIST NAMES OF ALL SHOPS WITHIN 8 ESTABLISHMENTS IN ANY DIRECTION OF FIRM STUDIED, WITHOUT A GAP OF MORE THAN 30 YEARS.

1.	11. ....
2.	12. ....
3.	13. ....
4.	14. ....
5.	15. ....
6.	16. ....
7.	17. ....
8.	18. ....
9.	19. ....
10.	20. ....

....

LOCATION IN BUILDING - (FLOOR/STREET FRONTAGE) ....

Thumbnail sketch - impressions of respondent, firm and interview ....

....

....

FOR OFFICE USE ONLY.

AGE OF BUILDING ....

BUILDING RATING [HARD-SOFT SURVEY]

....

TRAFFIC ZONE ....

AREA CODE ....

....

....

MAIN ROAD AND DISTANCE ....

BUS STOP AND DISTANCE ....

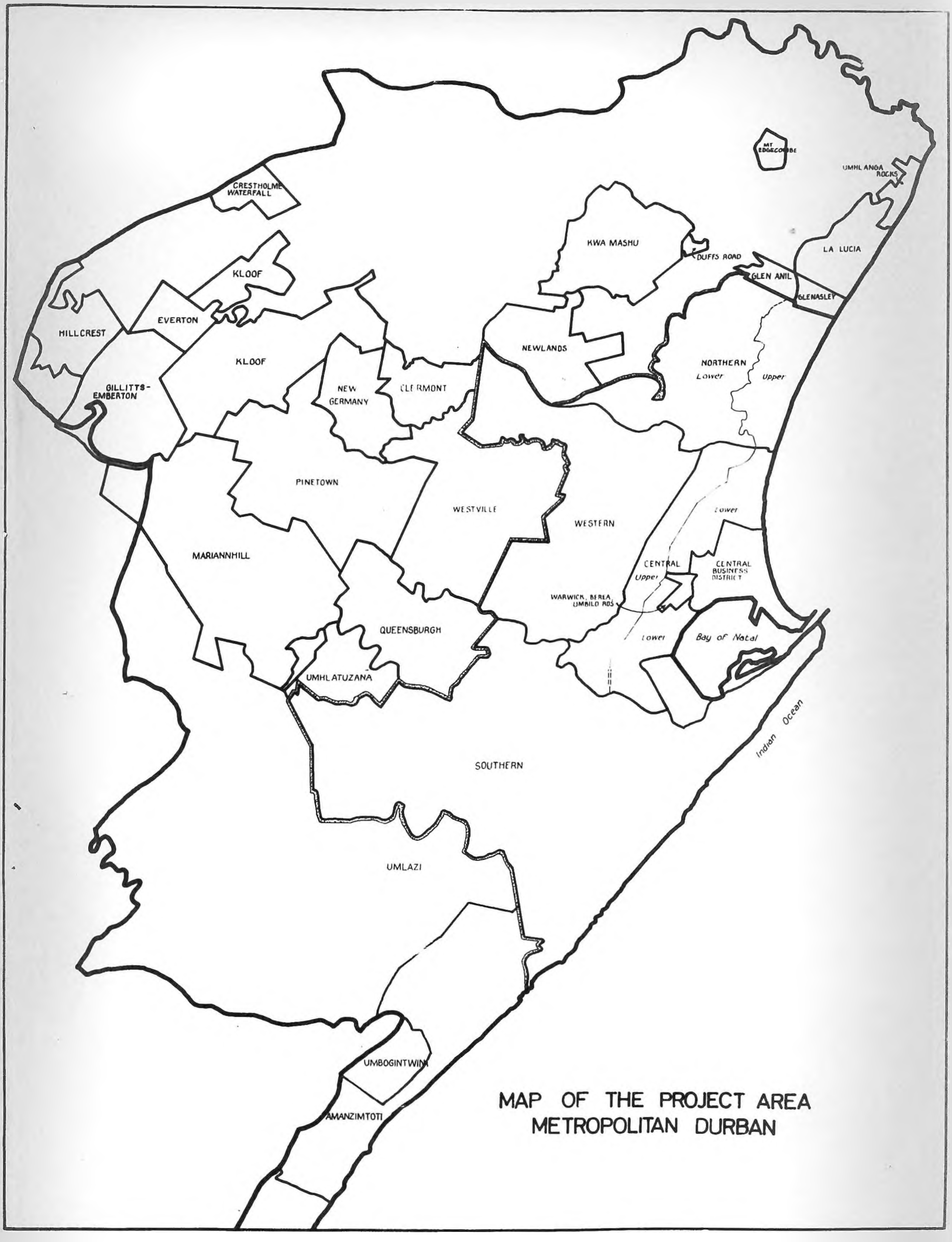
PARKING LOTS AND DISTANCE ....

STREET PARKING ....

APPENDIX D.

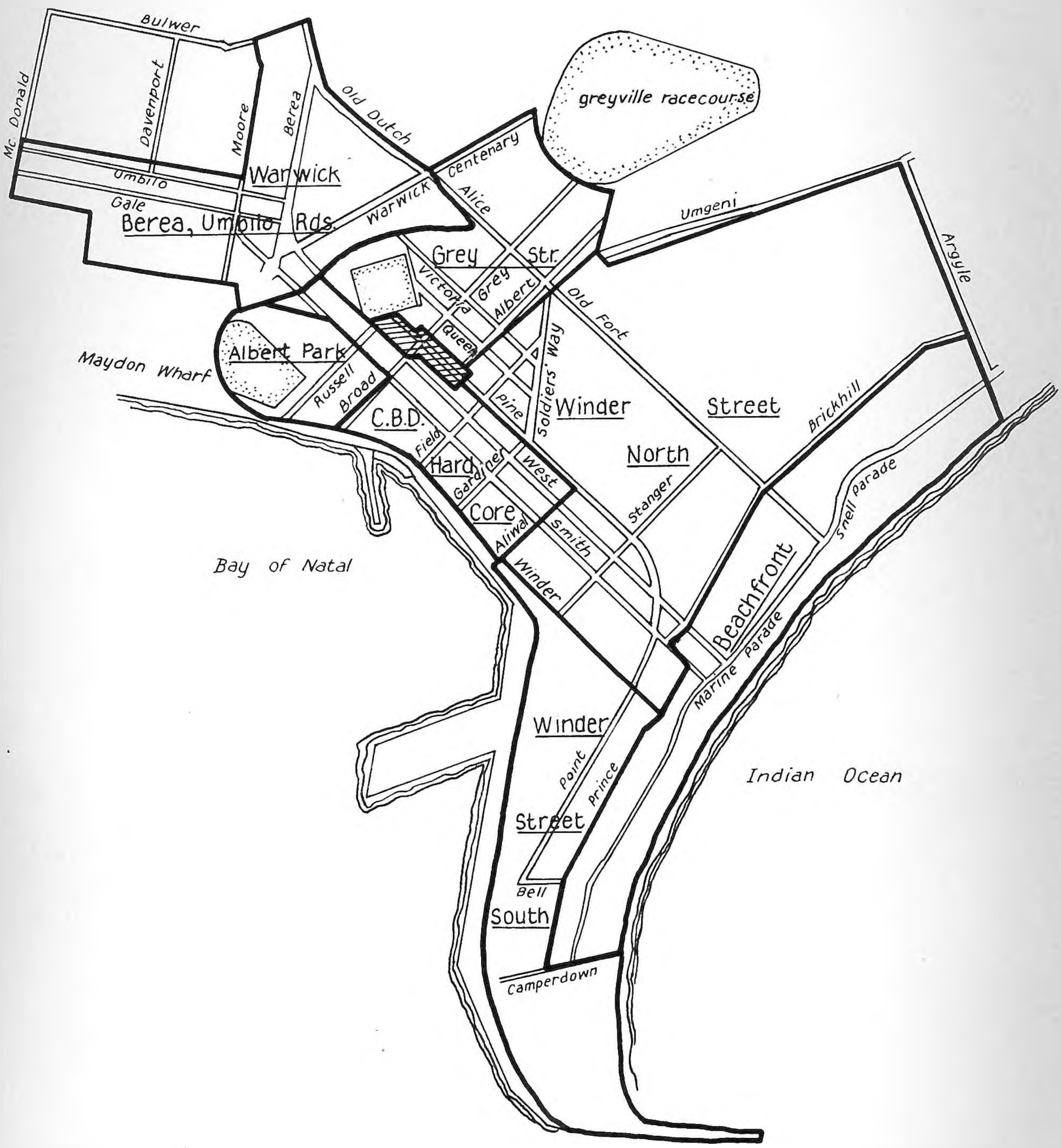
MAP OF THE PROJECT AREA - METROPOLITAN DURBAN.

MAP OF CENTRAL BUSINESS DISTRICT AND WARWICK/
BEREA/UMBILO ROAD COMPLEX.



MAP OF THE PROJECT AREA
METROPOLITAN DURBAN

MAP OF CENTRAL BUSINESS DISTRICT and WARWICK/BEREA/UMBILO rd. COMPLEX



NOTE.

Beachfront
Winder St. North
Winder St. South
Albert Park

} Rest of C.B.D.

A P P E N D I X   E.

BRIEF CONCLUSIONS REGARDING THE INDIAN MARKET.

This discussion will be limited to the Indian Market in the Grey Street area of the Central Business District. White Market Stalls were included in the sample, but since the White Market is apparently to be relocated in the Clairwood area of Durban, very few of the findings of the present study are of relevance at this stage.

In the Indian Market, roughly 90% of the stalls sell convenience goods, and the remainder sell curio's with some clothing and miscellaneous durables goods in addition. The stalls are very small, having a Median floorspace of 175 square feet, of which 60% is used for sales activity.

The current value of sales in the Indian Market is modest, the Median turnover per firm being roughly R6,250.00 per annum. However, turnover has increased fairly rapidly over the past five years as witnessed by the fact that the turnover in 1960/61 was 73% of the current total. In 1962/63 the turnover constituted 78% of present income, and in 1964/65 the proportion was 88%. These figures do show that the Indian Market has been prospering during recent years.

The future of the Indian Market in its present central position is insecure. Major road developments and official planning policies might result in the Market being relocated at some other site. If the Indian Market were to remain in its present state and on its present site, the stallholders estimate, on average, that their turnover per stall will increase by between 30 and 50 per cent up to 1970. This reflects an anticipation of a fairly sound business future.

One of the most significant features of the Indian Market is the ethnic composition of the customers who patronise its stalls. The average proportions of customers of different races are as follows: Whites 15%, Coloureds 5%, Indians 38%, Bantu 43%.

These proportions make it quite obvious that the Market as presently composed could only prosper in an area where there is a good passing trade from Bantu customers.

The stallholders realise this and are therefore almost totally opposed to any notion of the Indian Market ever being relocated in any of the Indian Townships. The only other area where the Market could prosper would be in the Warwick/Berea/Umbilo Road complex. A substantial proportion of stallholders draw attention to the fact that even a more central location, say in the vicinity of the station, would be bad for trade. The disadvantage in being more centrally located would be that the Market would no longer be quite as convenient for Indian customers whose activities are centred mainly in the Grey Street area.

The greatest advantages of the present location of the Market are that it is central for deliveries from suppliers, it is close to major bus ranks for Non-Whites, it is in close proximity to the major commercial developments in the Grey Street area, and that it is situated on a major pedestrian route.

The disadvantages of the present market are seen to be: stiff competition, stalls which are too small and cramped, a design which benefits some firms at the expense of others, and poor water and toilet facilities.