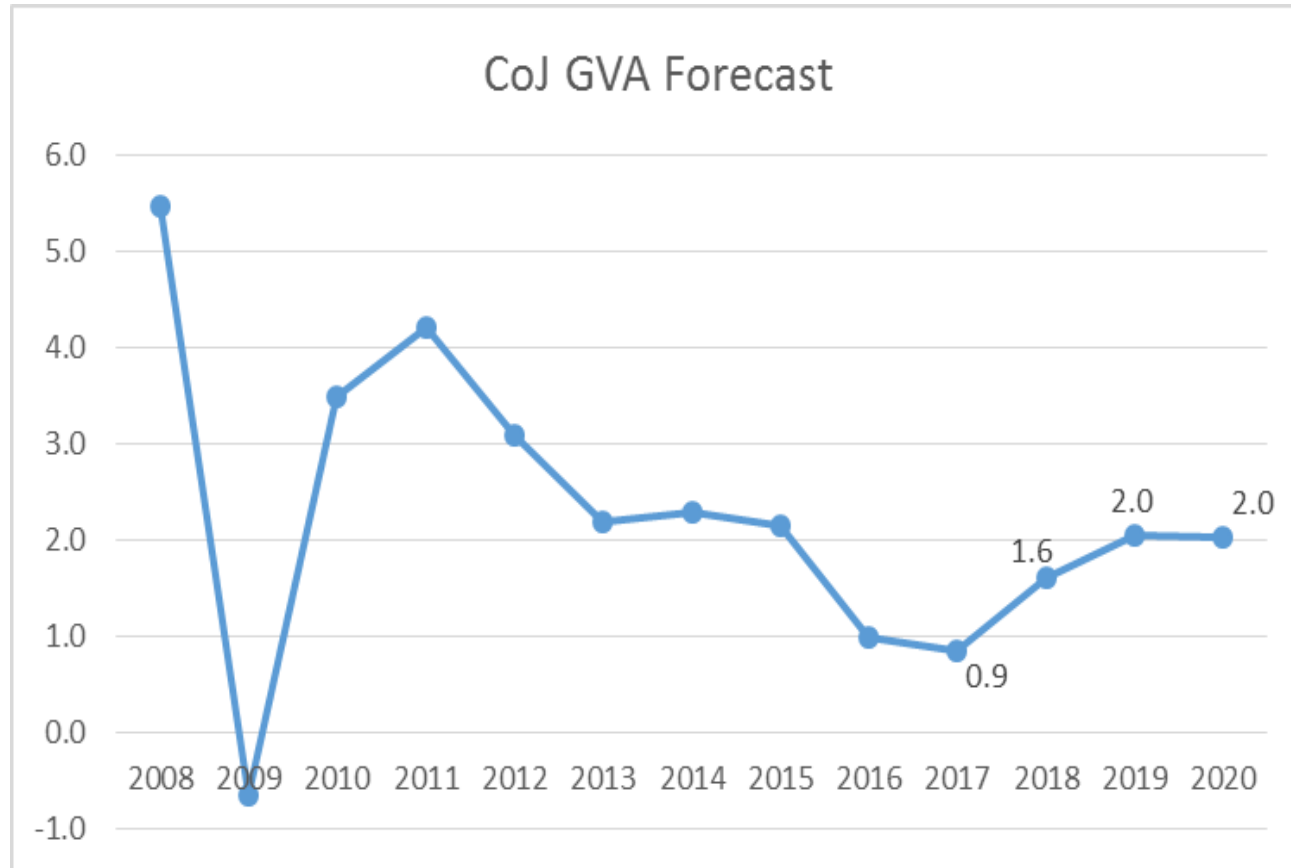


The City's population has doubled since 1996

AN ANALYSIS OF KEY TRENDS AND INDICATORS FOR THE CITY OF JOHANNESBURG

Economic Indicators

Gross Value Added (GVA)



Source: IHS Global Insight

- The City's GVA growth rates have been largely pedestrian since 2013 with growth rates below 3%.
- The forecast indicates growth rates oscillating around 2%.
- The City is determined to grow the economy by 5% per annum.
- To do this, the City will need to ensure that Johannesburg is an attractive location for business which will in turn drive up Enterprise investment and foreign direct investment.

GVA per sector

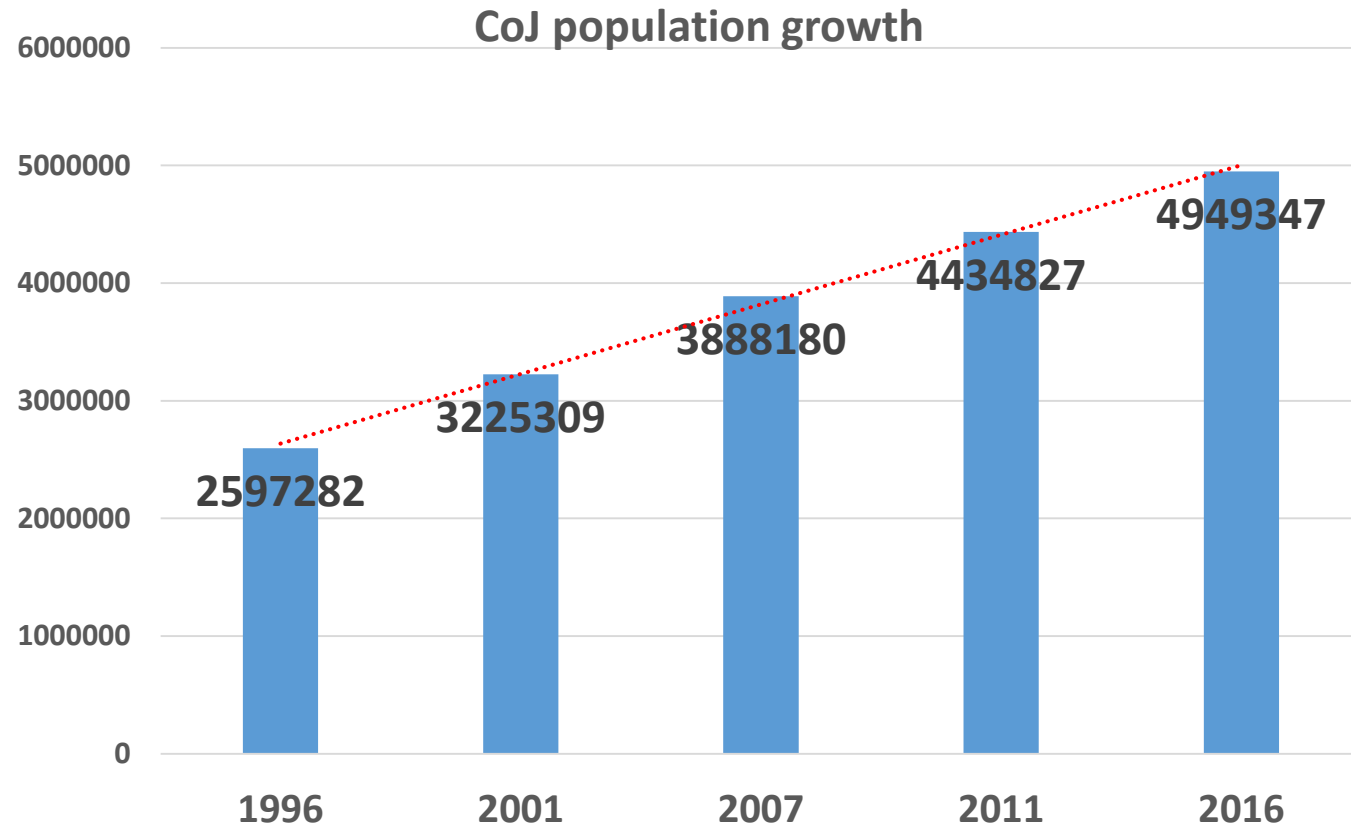
- The City is dominated by trade and finance sectors due to the it's central location in South Africa's geography, amongst other factors.
- Growth projections indicate increased growth in the tertiary sector particularly in the community, social and personal services.
- The wholesale and retail trade, catering and accommodation sector which has been dominating in the last 5 years is likely to be retarded in favor of the transport, storage and communication sector; the finance, insurance, real estate and business services sector and the community; and social and personal services sector.

Source: IHS Global Insight

| CoJ: GVA at basic prices (2010 Rm) | 2010-2015 | 2015-2020 |
|---|-----------|-----------|
| Total GVA | 3.1% | 1.5% |
| Primary sector [SIC: 1-2] | 1.2% | 1.2% |
| Agriculture, forestry and fishing [SIC: 1] | 0.0% | 0.1% |
| Mining and quarrying [SIC: 2] | 1.4% | 1.4% |
| Secondary sector [SIC: 3-5] | 2.3% | -0.2% |
| Manufacturing [SIC: 3] | 2.7% | -0.4% |
| Electricity, gas and water [SIC: 4] | 1.1% | -0.9% |
| Construction [SIC: 5] | 1.6% | 0.9% |
| Tertiary sector [SIC: 6-9] | 3.3% | 1.9% |
| Wholesale and retail trade, catering and accommodation [SIC: 6] | 3.6% | 1.1% |
| Transport, storage and communication [SIC: 7] | 2.9% | 2.2% |
| Finance, insurance, real estate and business services [SIC: 8] | 3.3% | 2.3% |
| Community, social and personal services [SIC: 93-96, 98] | 1.9% | 2.2% |
| General government [SIC: 99] | 3.7% | 1.7% |

Demographics

Population growth VS household size



Household size



1996 = 4.3
 2001 = 3.9
 2011 = 3.1
 2016 = 2.7

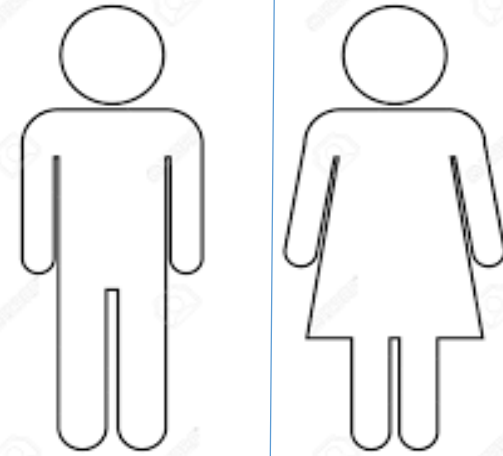


- The City’s **population** has doubled since 1996 . In 1996, there were 2.59 million people living in the City, the figure has increased to 4.9 million in 2016.
- The total **number of households** have also doubled since 1996. The number of households increased from 959 thousand in 1996 to 1.85 million in 2016.
- Increased population size and number of households puts pressure on the delivery of services by the City as the demand for services increases as well . The increasing population size also has an effect of the unemployment rate in the City given that most migrants relocate to the City in search of better economic opportunities;
- Consequently, the **household size** has declined from 4.3 in 1996 to 2.7 in 2016. Some of the key drivers for this decline may include:
 - The increased housing delivery (RDPs and rental properties);
 - Social acceptance of unmarried couples;
 - Women’s penetration of the job market with adequate wages which allows them access and the ability to pay bonds and rent;
 - Greater access to contraceptions and delayed child bearing;

Total number of households



2016 = 1 853 371
 2011 = 1 434 856
 2001 = 1 005 779
 1996 = 959 299



Male

2011
 2 225 137 (50%)
 50%)

Female

2011
 2 209 690 (

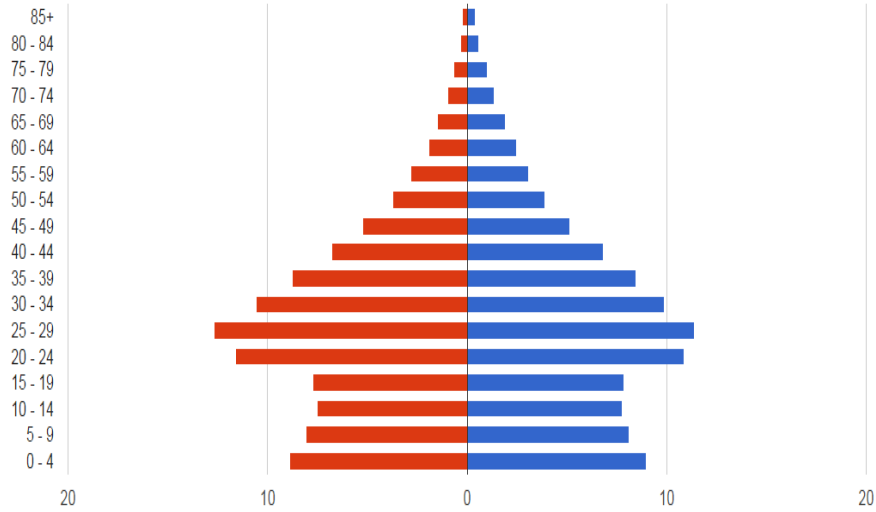
2016
 2 478 191 (50%)
 (50%

2016
 2 471 156

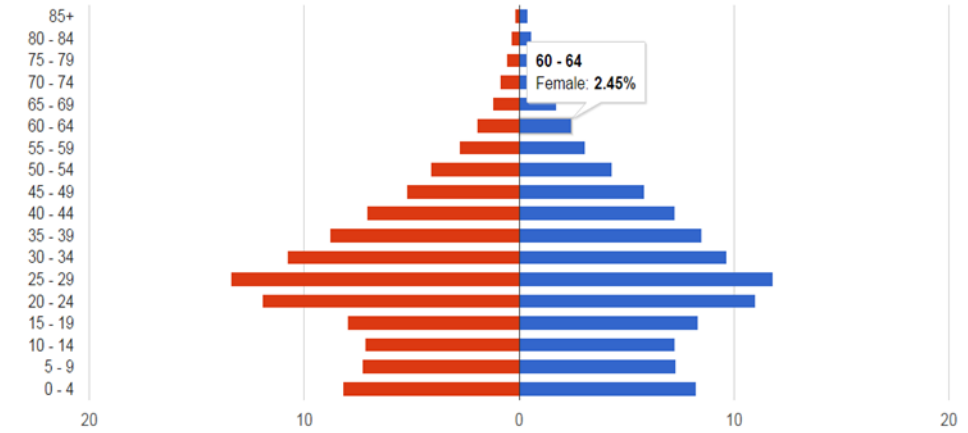
Youth- 2011 (42%)
 2016 (33%)

| | 2016 | 2011 |
|---------------|------|------|
| Black african | 80% | 77% |
| Coloured | 5% | 6% |
| Indian/asian | 4% | 5% |
| White | 10% | 12% |

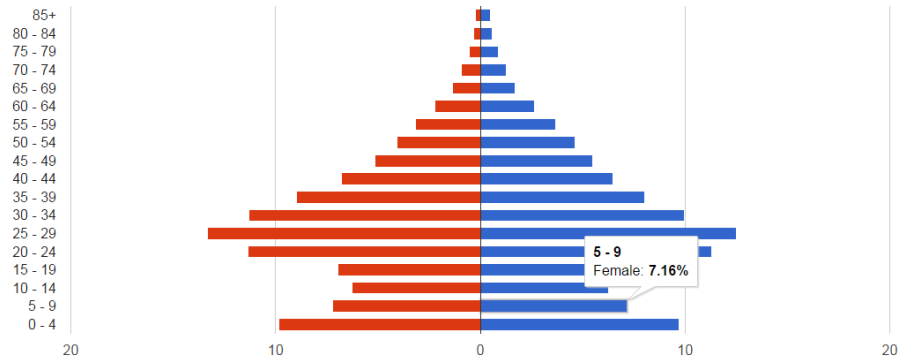
Population pyramid : 1996



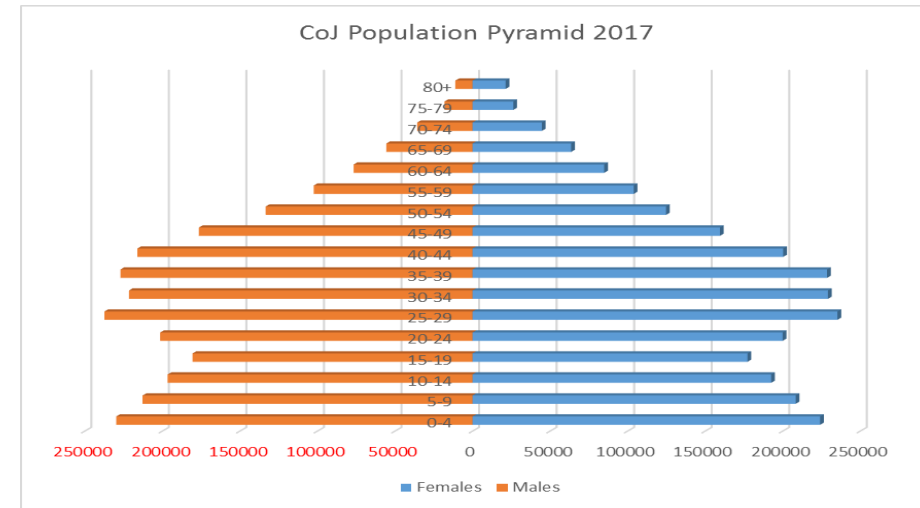
Population pyramid : 2007



Population pyramid :2011



Population pyramid :2017



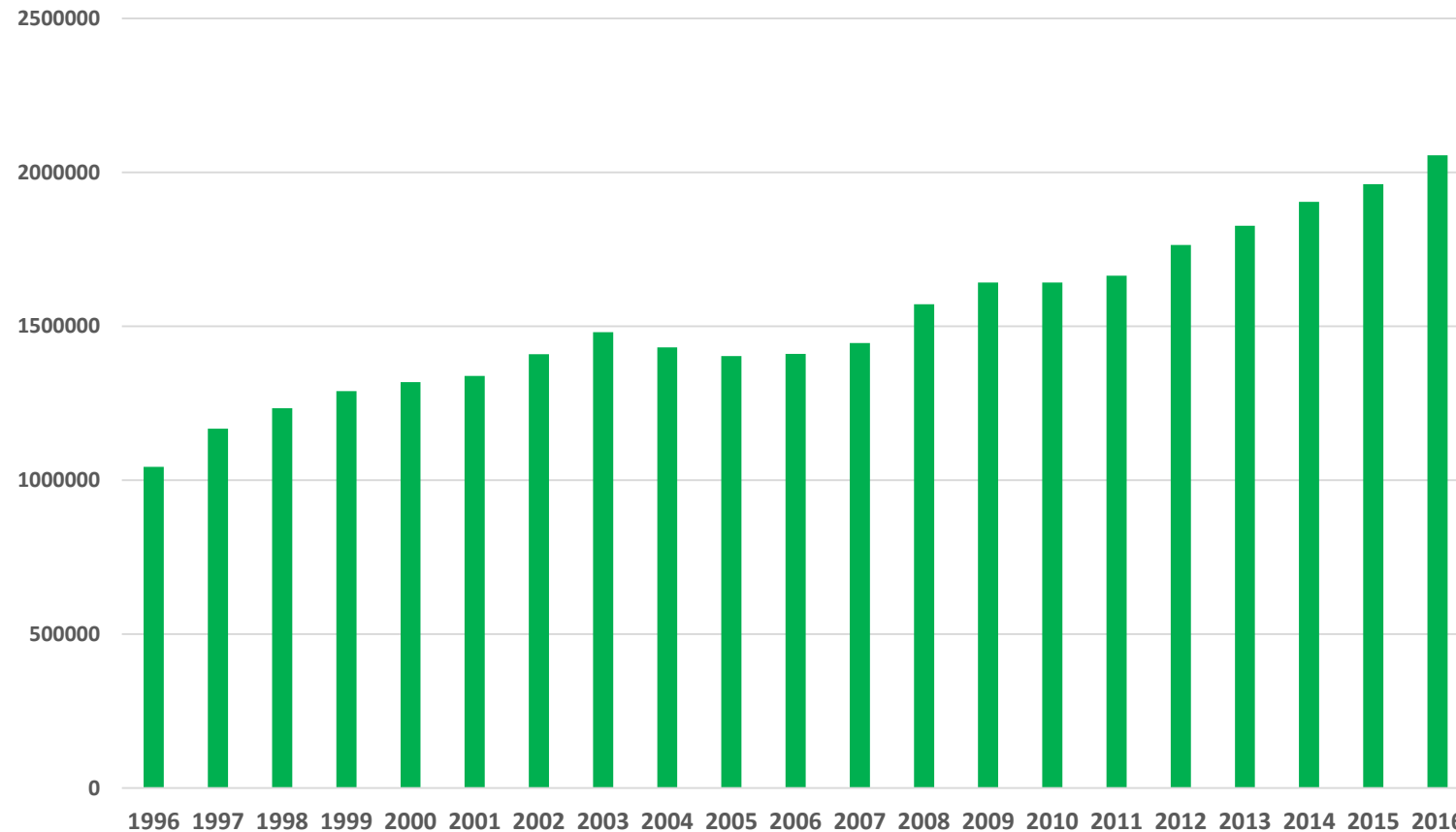
Trends: demographics (Contd)

- Both the **female and male population** accounted for 50% of the total population of the City in 2011 and 2016;
- **Racially**, a majority of the City's population is black (77%in 2011 and 80% in 2016), the second highest are white (12% in 2011 and 10% in 2016);
- The **youth** accounted for 42% of the population in 2011. The percentage has declined by 9% to 33% in 2016. Although the City's youthful population should bring with it some advantages such as a large workforce and tax base, this is impeded by the high youth unemployment which currently stands at 38%. The dangers of youth unemployment can result in:
 - an increase in the risk of poverty, deskilling and social exclusion as well as cause loss of motivation;
 - a lack the experience needed to fill a job opening, which prevents the youth from getting employed. Thus, the job-searching period for them becomes considerably longer than for experienced workers, which leads to gaps in employment history, loss of skills and productivity, and harms their future work prospects.

Poverty

People living below the poverty line

People living below the upper poverty line (StatsSA defined)

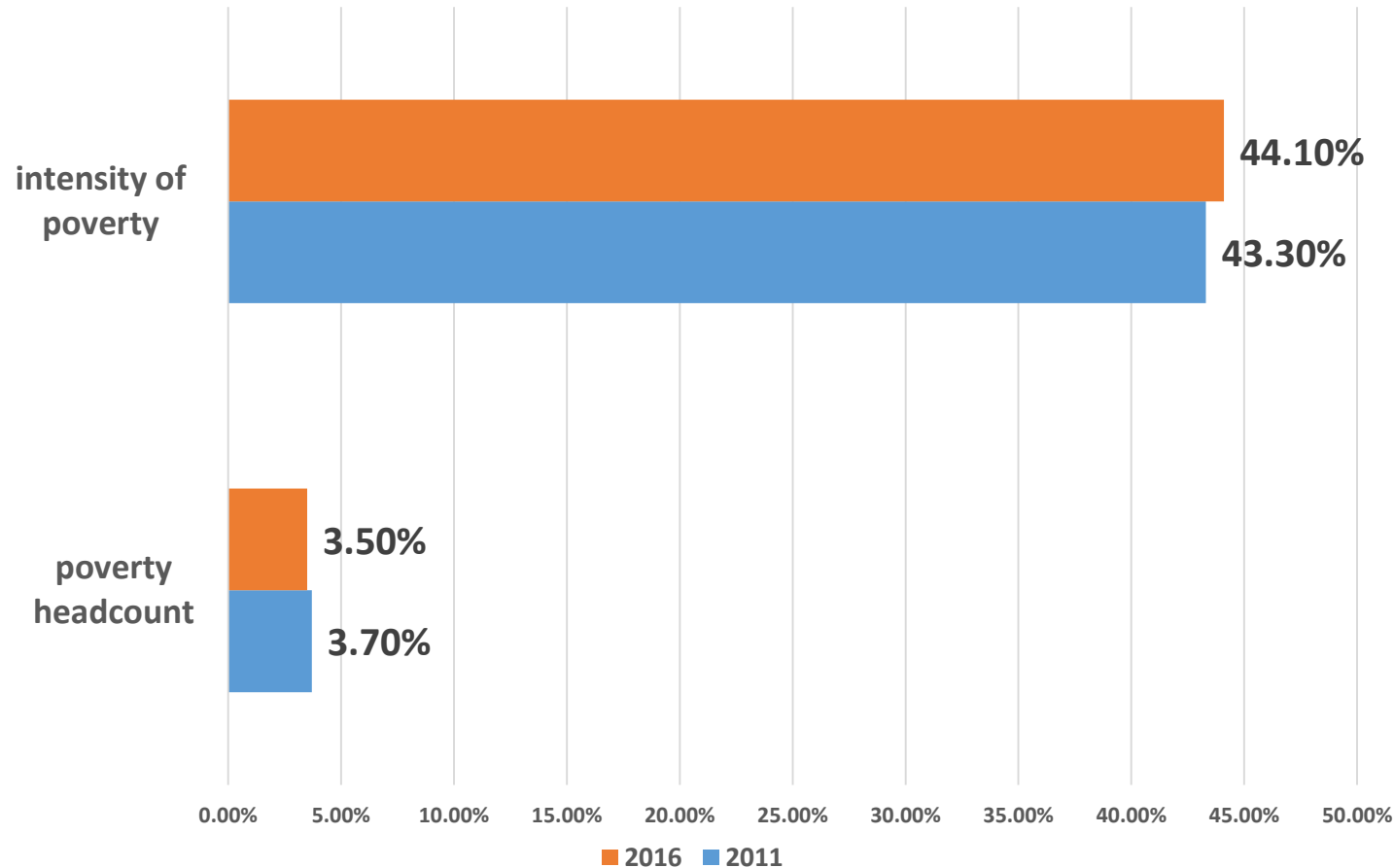


The total number of people living below the upper bound poverty line (UBPL) of R992 per person per month has increased from 1.04 million in 1996 to 2.05 million in 2016.

The 2.05 million figure for 2016 translates to 42% of the City's population living in poverty in 2016 compared to 40% of the population that lived in poverty in 1996.

Source: IHS Global Insight

The poverty headcount and the intensity of poverty in the City



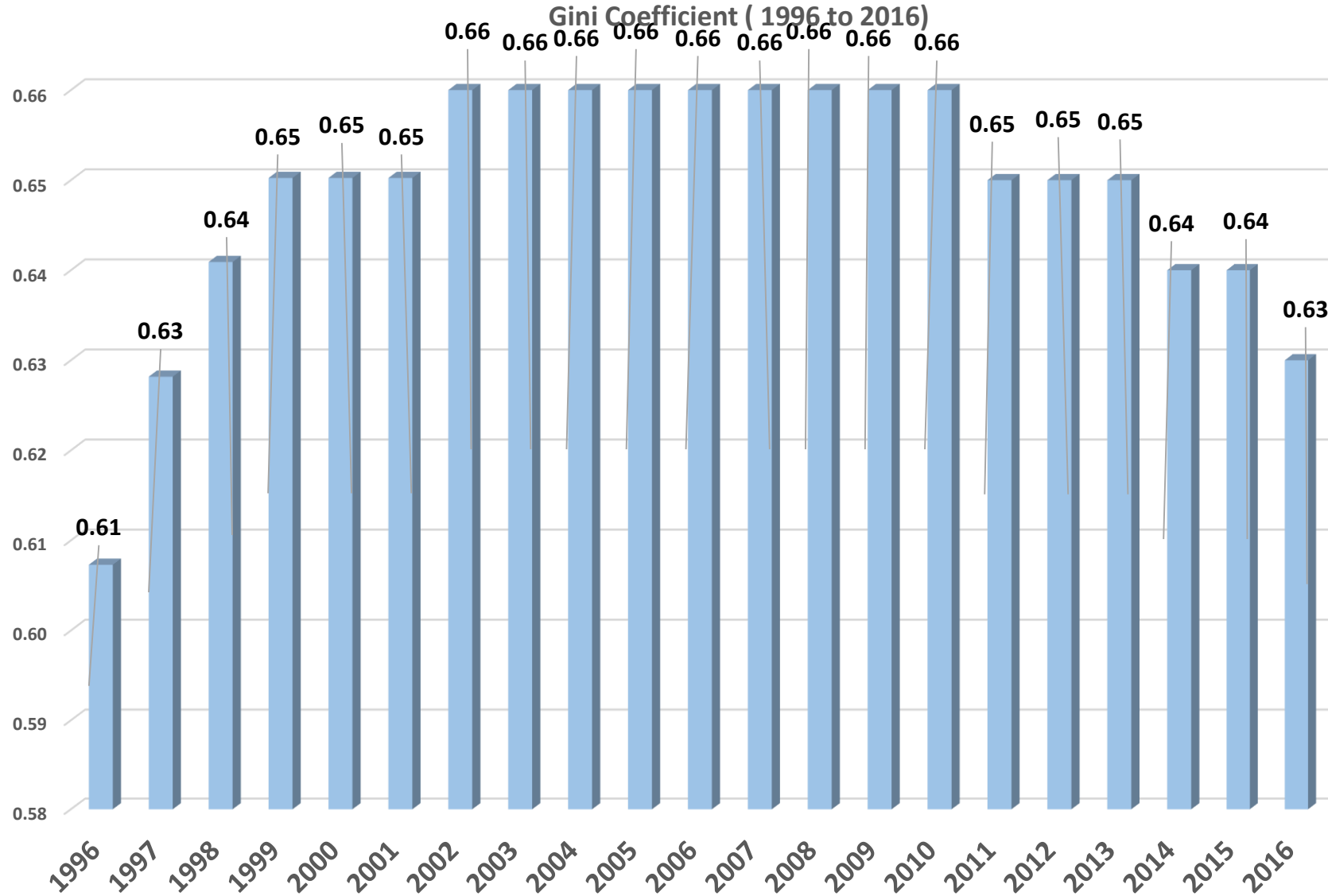
Source: Statistics South Africa

- The multidimensional poverty headcount¹ has slightly declined from 3.7% in 2011 to 3.5% in 2016 however, the intensity of poverty has increased from 43.3% to 44.1%. This means that although the total number of people multidimensionally poor has declined by 0.2 percentage points, those who have remained poor have become worse off and more vulnerable than before.
- The City needs to continue in implementing pro-poor programmes that can permanently remove the poor out of poverty. Education, skills and job opportunities are crucial in attaining this.

¹ The MPI assesses poverty at individual/household level. If someone is deprived in a third or more of ten (weighted) indicators which include (1) Nutrition (2) child mortality (3) years of schooling (4) school attendance (5) cooking fuel (6) sanitation (7) water (8) electricity (9) floor (10) assets.

Inequality

Gini Coefficient



The Gini coefficient² for the City has slightly increased from 0.61 in 1996 to 0.63 in 2016 . The City has remained one of the most unequal Metros in the country.

Rising inequality undermines economic growth because it deprives the ability of lower-income households to stay healthy and accumulate physical and human capital.

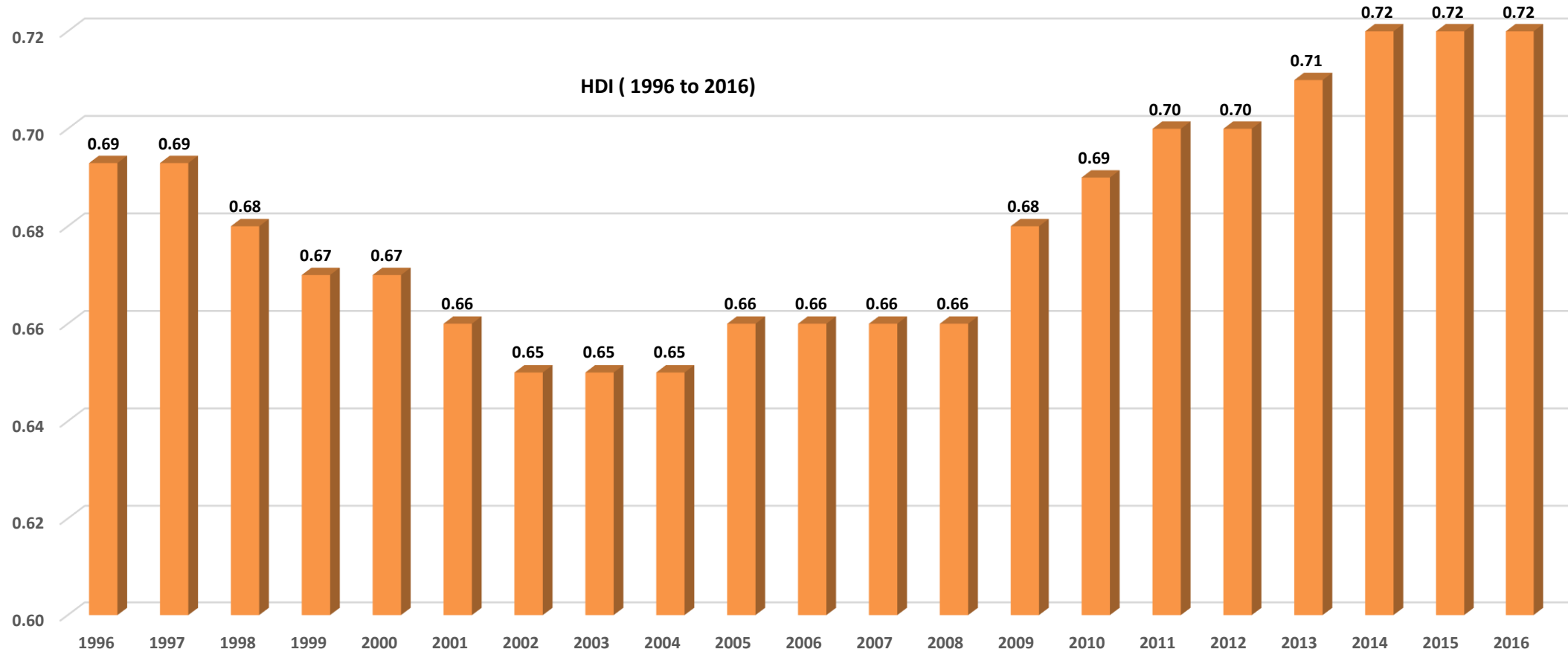
The city needs to find an approach to reduce income, spatial, and gender inequality by creating meaningful economic opportunities for all.

Source: IHS Global insight

² Gini Coefficient= The Gini coefficient was proposed by Gini as a measure of inequality of income or wealth. A Gini coefficient of zero (0) expresses perfect equality and a Gini of one (1) expresses perfect inequality. 14

Human development

Human development index (HDI)³



- The City's HDI has increased from 0.69 in 1996 to 0.68 in 2009 and to a high of 0.72 in 2016. This shows that there has been an improvement in the standards of living in the City.
- This further signifies that the City is still associated with better economic opportunities and remains a city that attracts people from all walks of life who are in search of better opportunities;

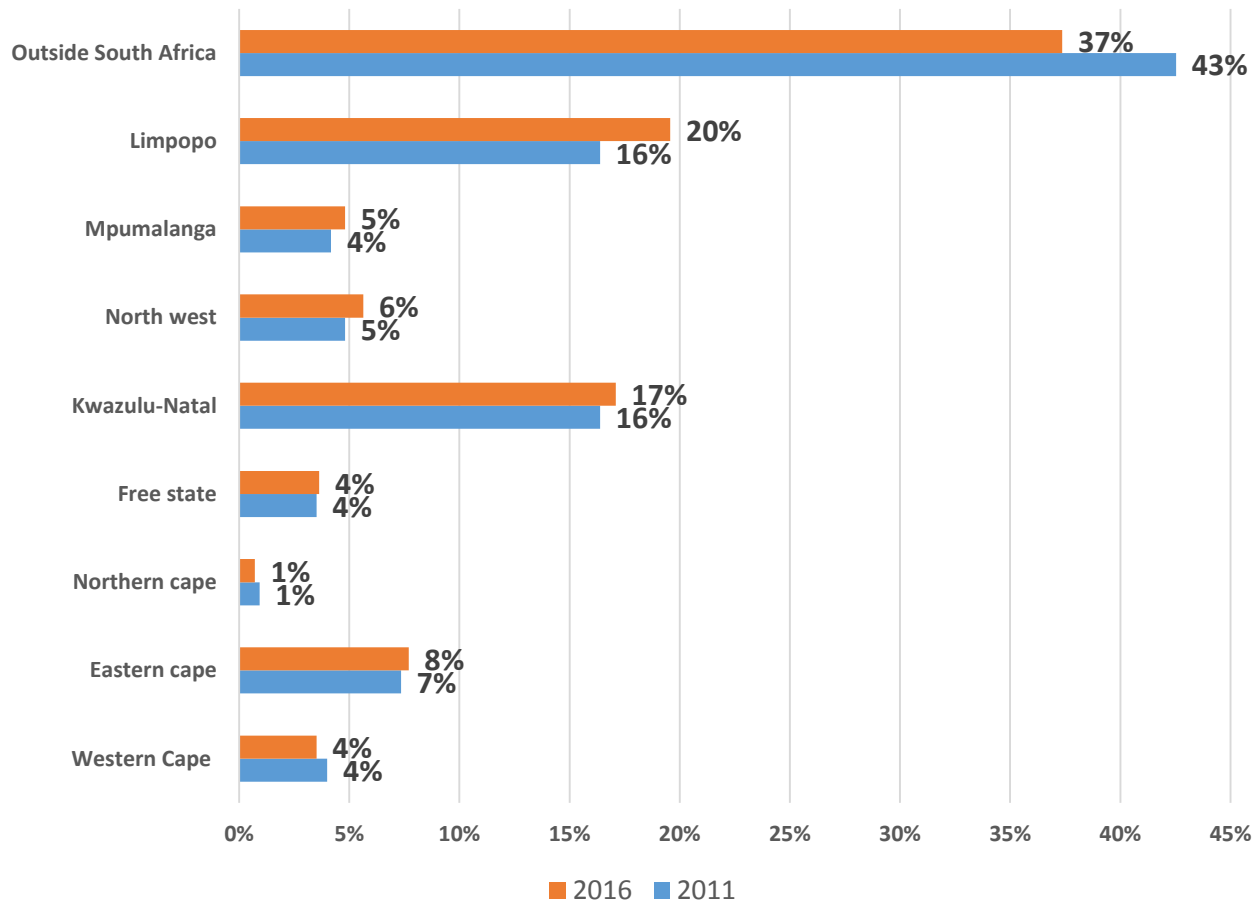
Source: IHS Global insight

³HDI is a composite statistic (composite index) of life expectancy, education and per capita income indicators, which are used to rank the level of human development in an area.

Migration and mobility

Migrants living in the City

Migration from other provinces (2011 & 2016)



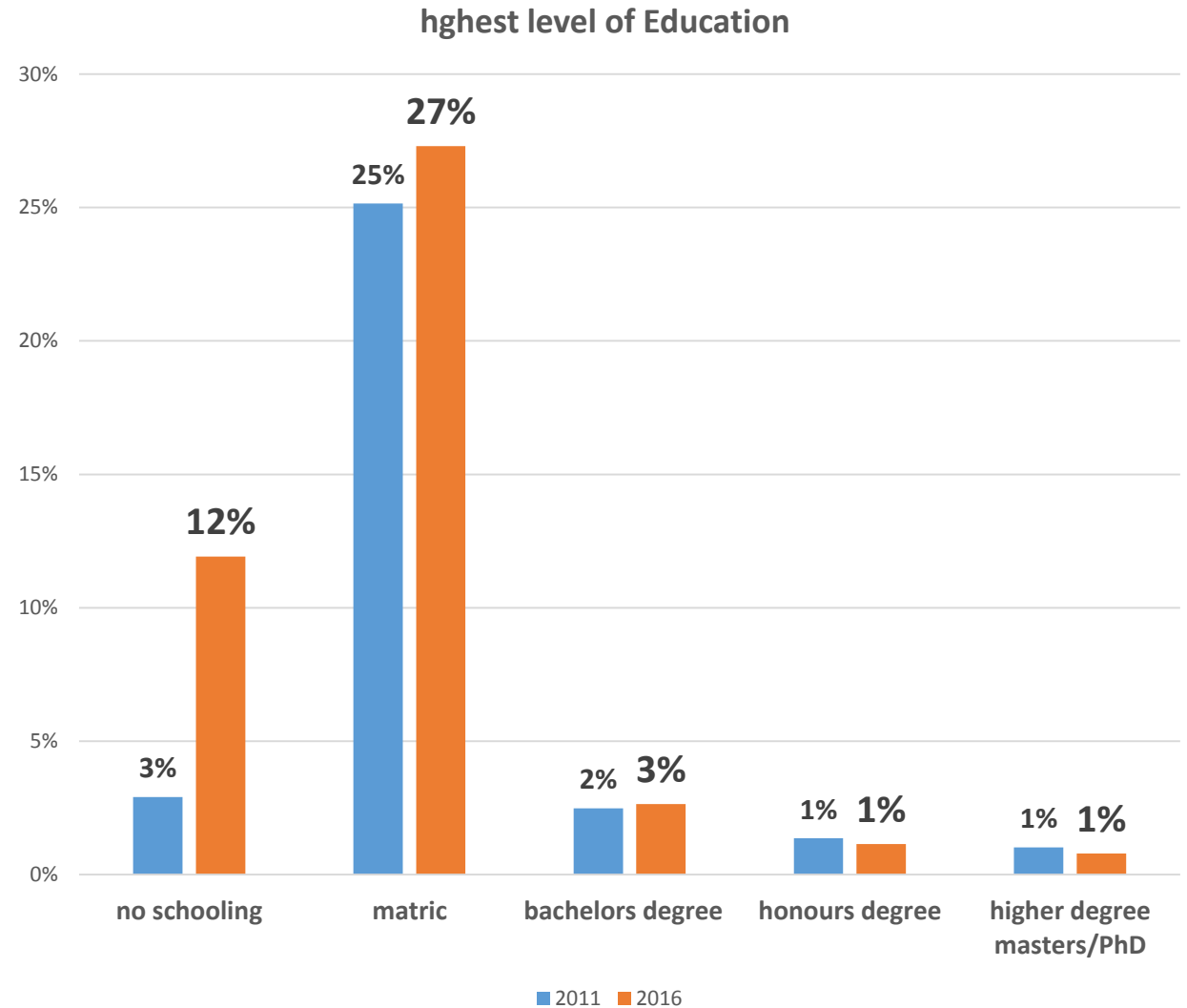
Source: Statistics South Africa

- Migration from other provinces has been largely from the Limpopo and KwaZulu-Natal provinces (approximately 20% and 17% in 2016 relatively).
- A high percentage of the migration has been from those living outside of South Africa. There were 43% in 2011 and 37% in 2016.
- The high percentage of migration has adverse implications for the City, as it grows, a city of this nature is likely to remain a contested space that is characterized by issues such as the lack of integration and cohesion, unless some deliberate measures are taken by the city government to establish and foster a distinct “Joburg identity” that can create an enabling environment for inclusivity and unity in diversity towards a new urban culture in Johannesburg.
- Given what the numbers illustrate in terms of the city’s growth rate and the challenges presented by the ‘migrant crisis’, issues of exclusion – and by extension, inequality – are likely to persist going forward. It is clear that a comprehensive policy response is needed to enable the City to effectively address these challenges.

Education

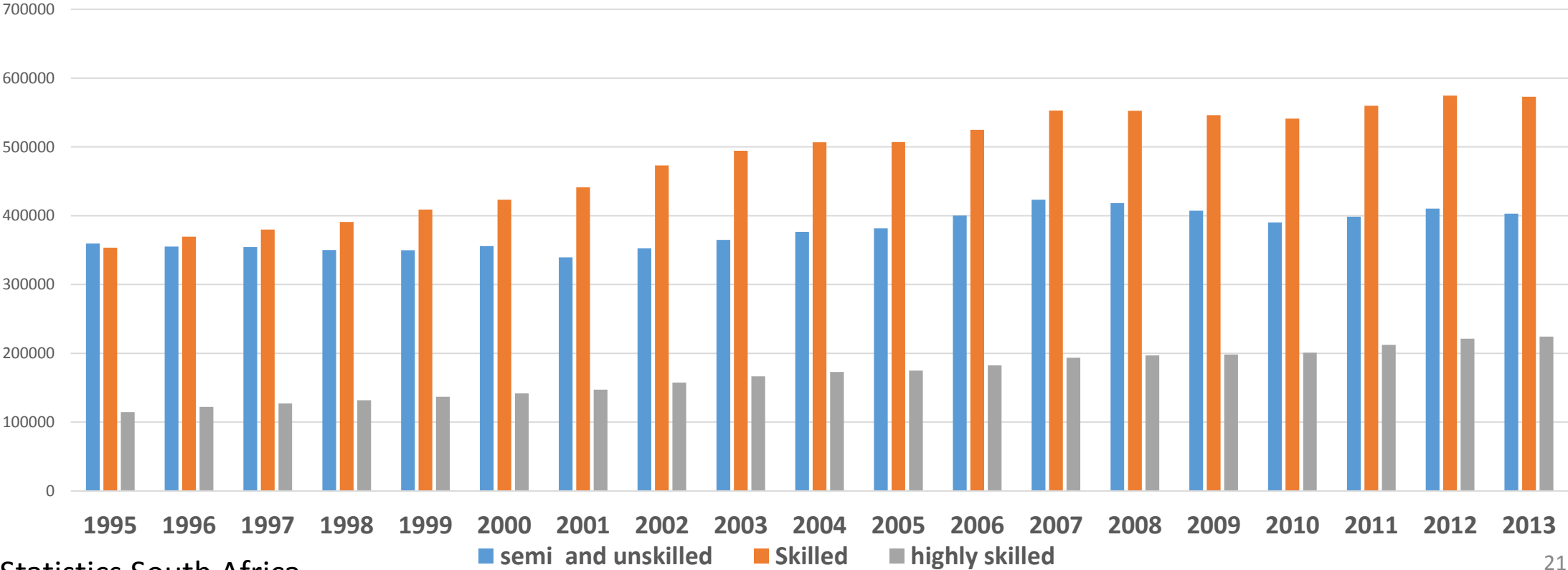
Highest level of Education

- The percentage of people with matric and bachelor degrees has increased slightly by 2% and 1% from 2011 to 2016 respectively.
- The total share of persons with matric ,bachelors' degrees and postgraduate degrees has however remained extremely low in Johannesburg, when compared with other cities.
- What is concerning is that the schooling system that is producing matriculants with low numeracy and reading skills. Johannesburg's literacy level (when measured in terms of 'those above 20 years, who have completed grade 7 or higher) is 92.2 %, compared to the national figure of 73.7%. This improved from 87.6 % in 2011. Also of great concern is that the percentage of people with no schooling who have increased by 9% from 2011 to 2016
- The City needs to strengthen its current role in education and learning by making a number of critical investments in educating and skilling its workforce, but also by opening up the economy to ensure that even those who hold lower levels of educational qualifications can access the economy.



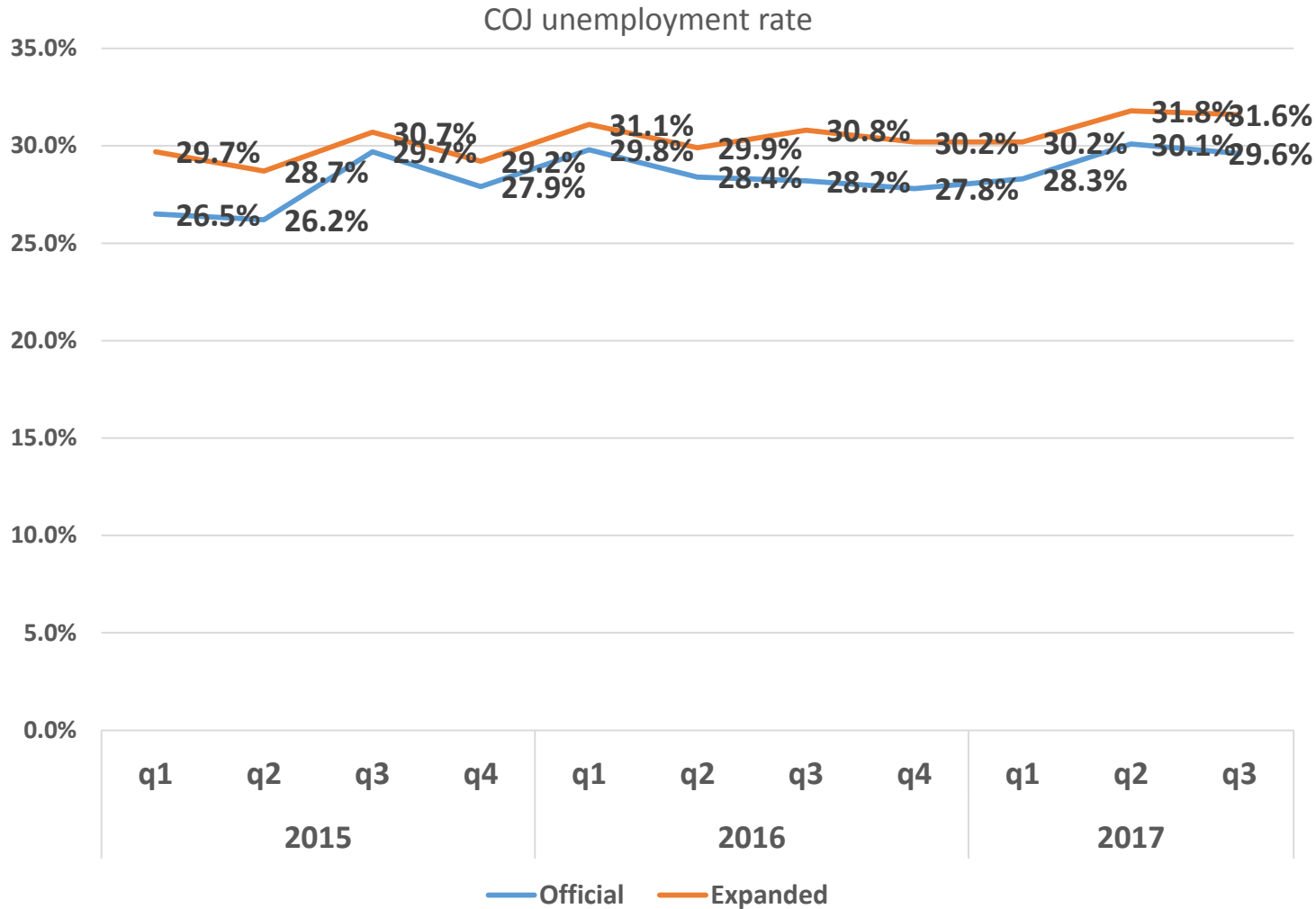
Labour: skill level

- The city has a high percentage of Skilled labourers in comparison to semi-skilled and unskilled labourers;
- Although the number of highly skilled labourers has been on rise since 1995 this has increased at a slow pace when compared to skilled and semi-skilled people. The number of highly skilled people in the City is a little over 200 000 (2013).
- This implies that the City needs to invest in industries that require and demand people with semi-skilled and unskilled workers. It should however be noted the jobs that require unskilled labour are continually shrinking due to technological and societal advances. Jobs that previously required little or no training now require training. Thus the City needs to focus on creating training facilities and programmes for unskilled labour more especially the youth.



Employment

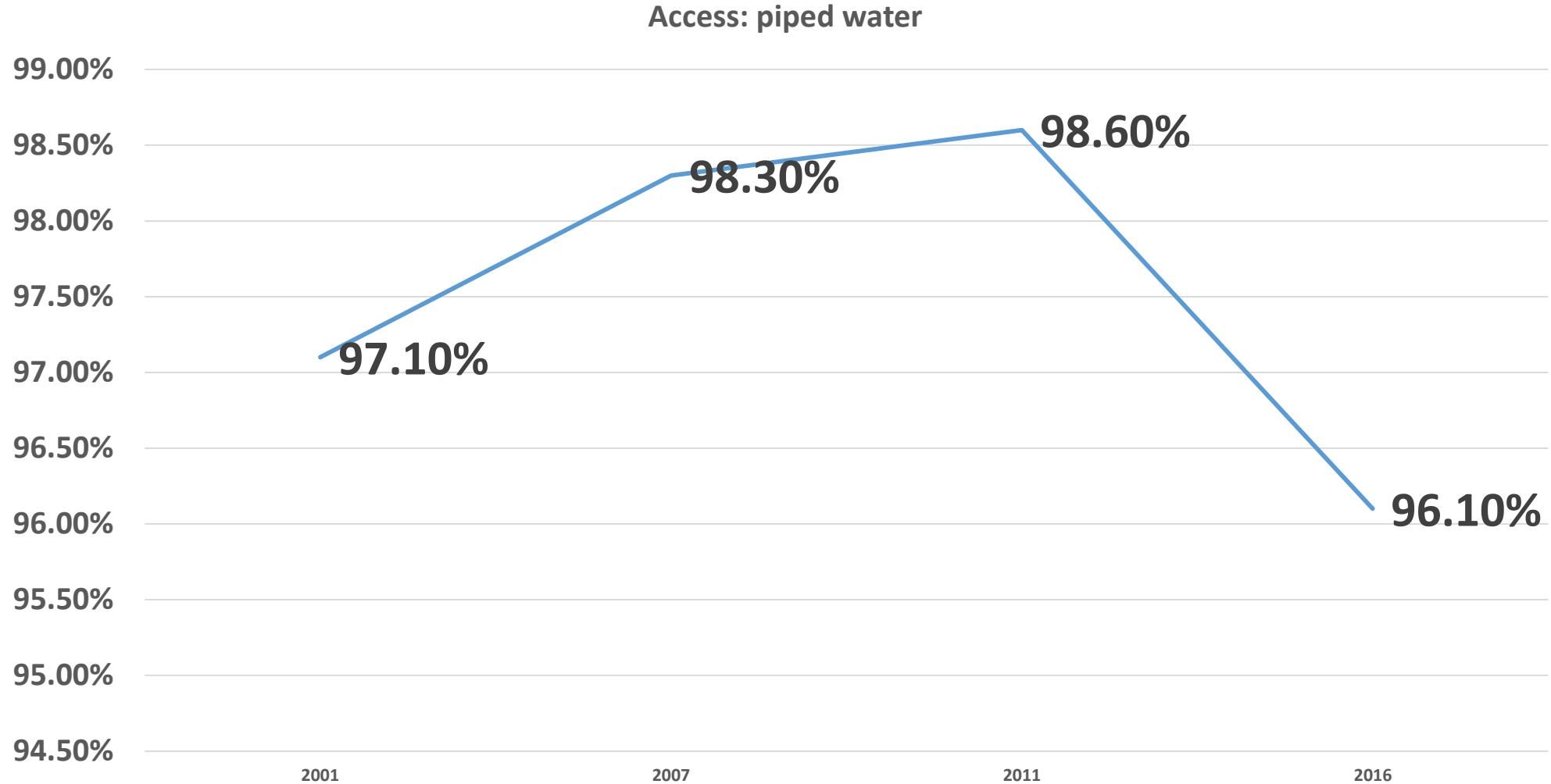
Unemployment rate



- Johannesburg’s official unemployment rate has been on a rising trend and measured 29.6% in Q 3 of 2017 – a slight increase from the rate of 28.2 % of the same quarter in 2016.
- About 831 000 people are currently unemployed according to the official definition, increasing to 819 000 (or 31.6 %) under the expanded definition.
- Of concern is the fact that the number of discouraged work seekers as percentage of the unemployment pool has increased from 10% in quarter 2 of 2015 to 37% of quarter 3 of 2017. Whilst a majority of these work seekers has been unemployed and have been without a job for more than 1 year, they are also poorly qualified hence the chance to be re -employed in the formal sector of the economy becomes increasingly difficult.

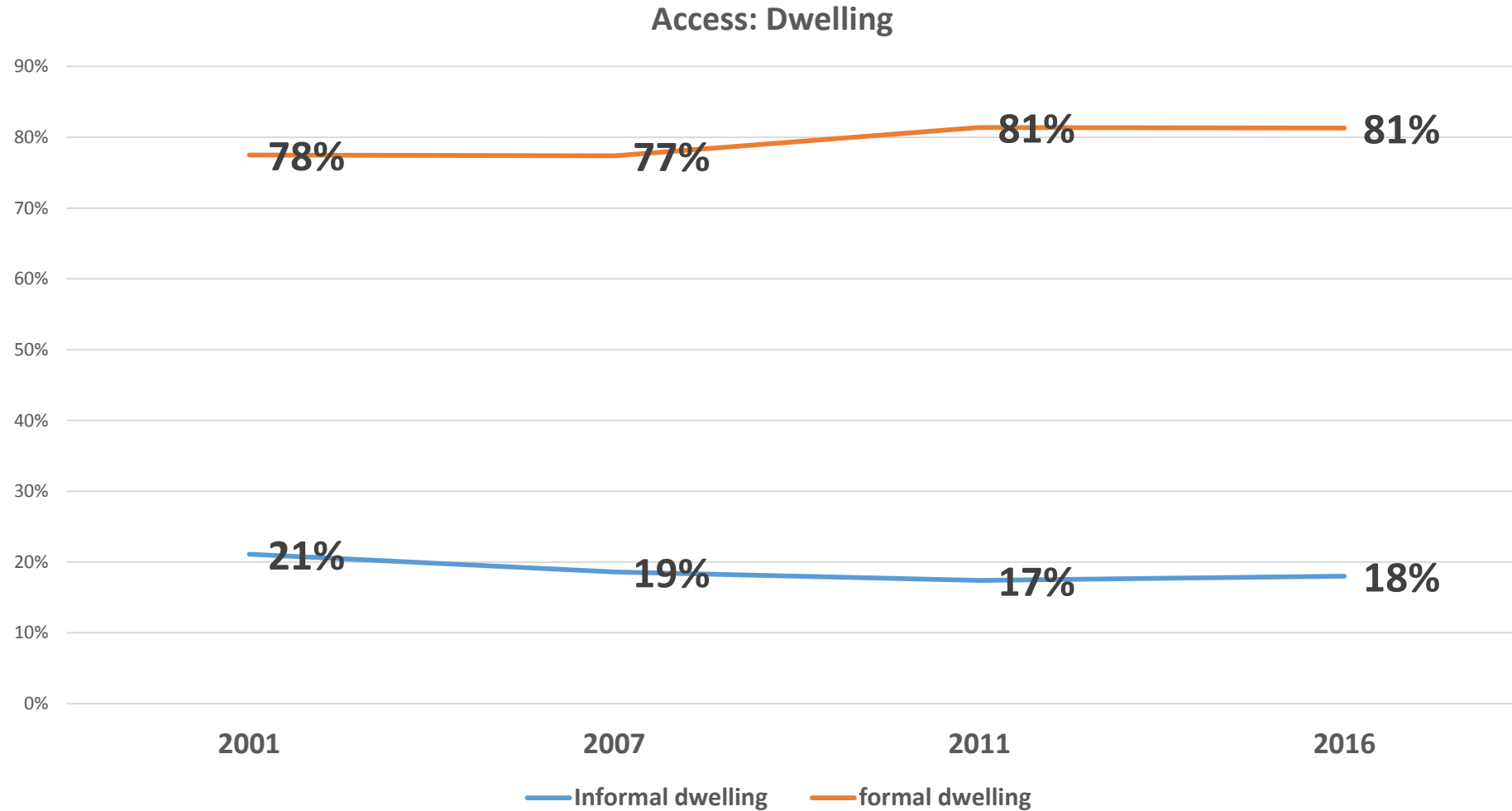
Basic services

Water



- Access to piped water has declined by 1% from 97.1% in 2001 to 96.1% in 2016

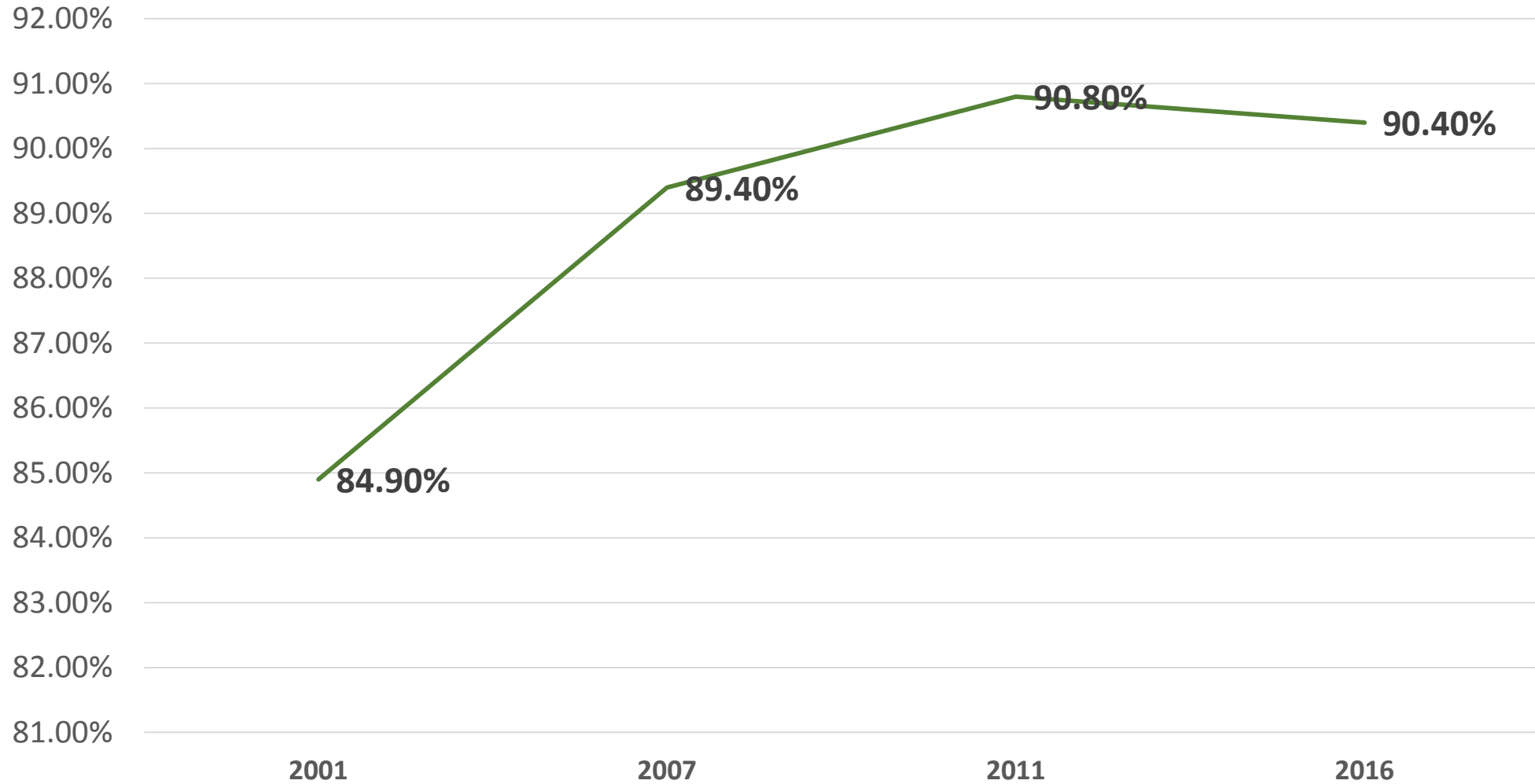
Housing



- Formal dwelling has increased by 3% from 78% in 2001 to 81% in 2016 while informal dwelling declined 3% from 21% in 2001 to 18% in 2016

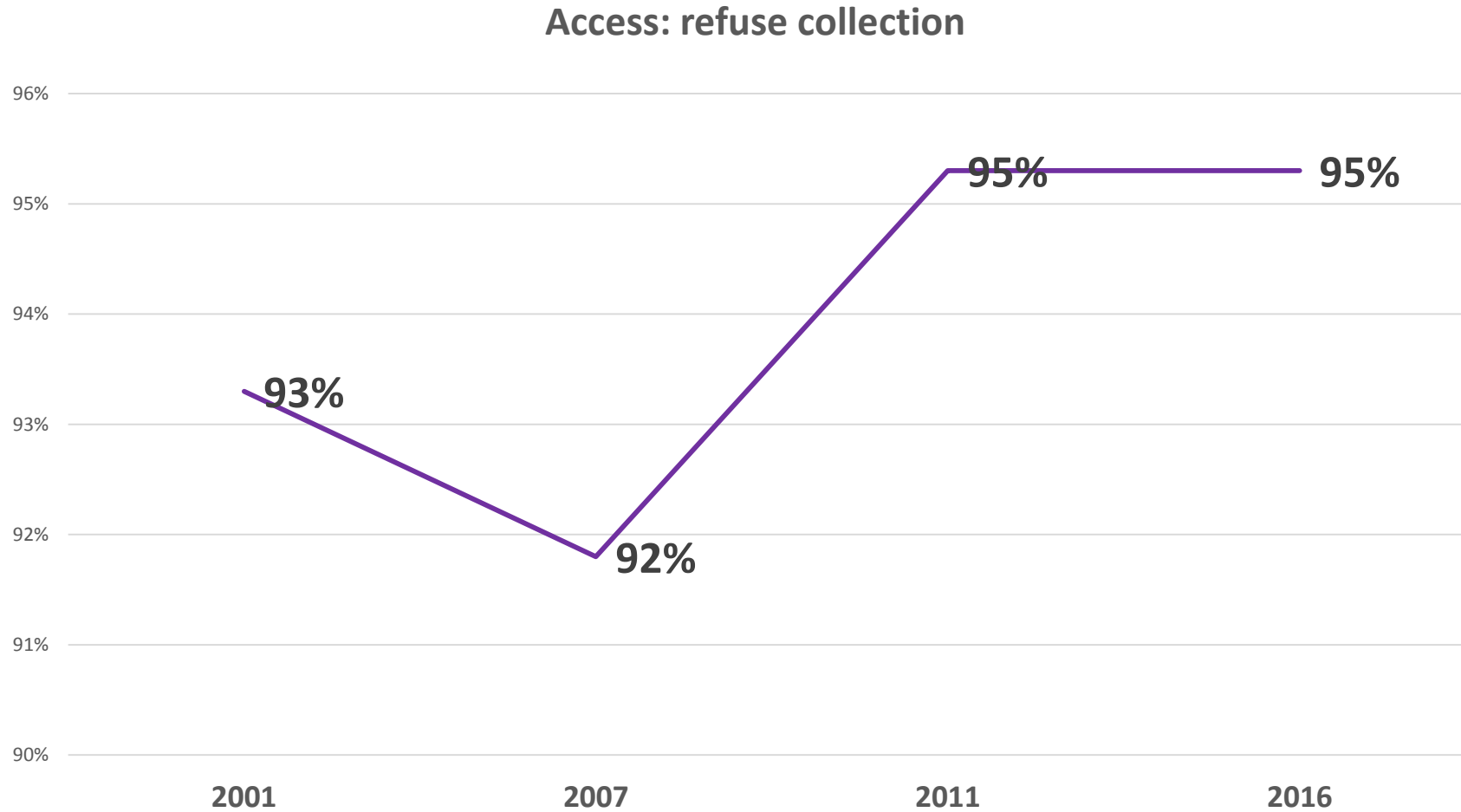
Electricity

electricity connection



- Connection to electricity has increased by 5.5% from 84.9% in 2001 to 90.4% in 2016

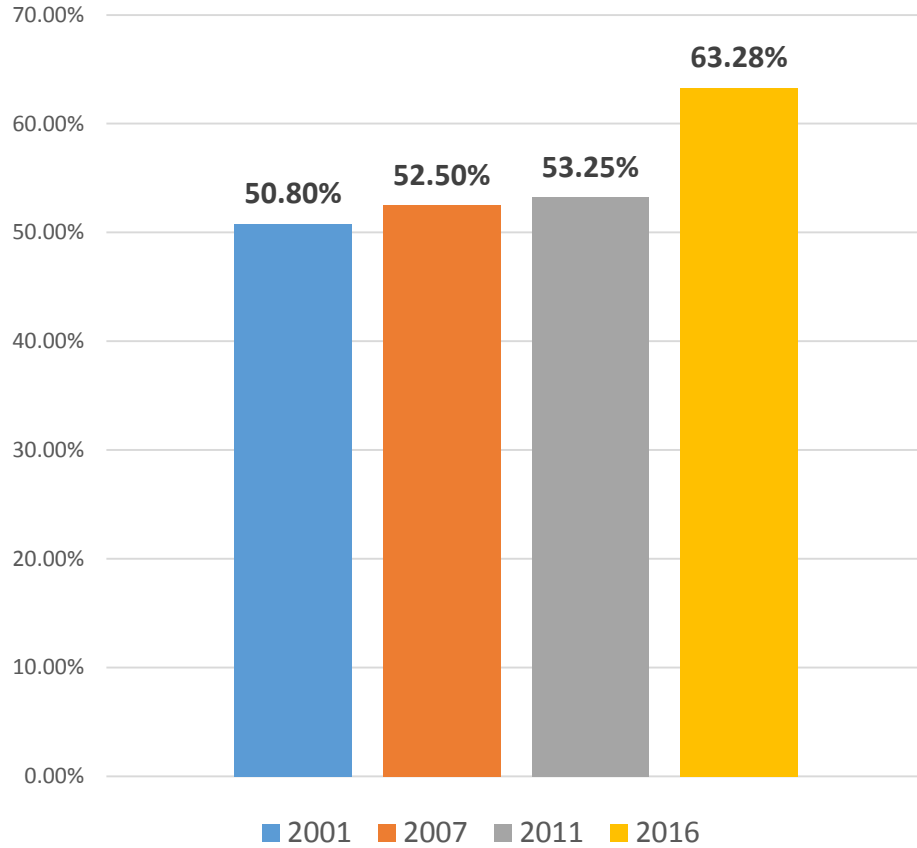
Collection of refuse



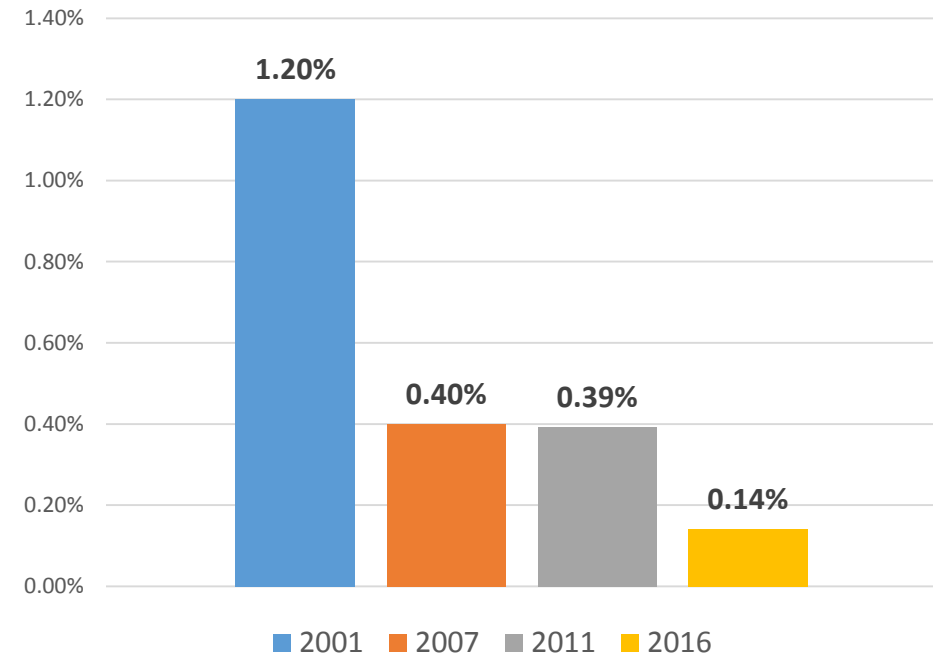
- Access to refuse collection has increased from 93% in 2001 to 95% in 2016

Dwelling

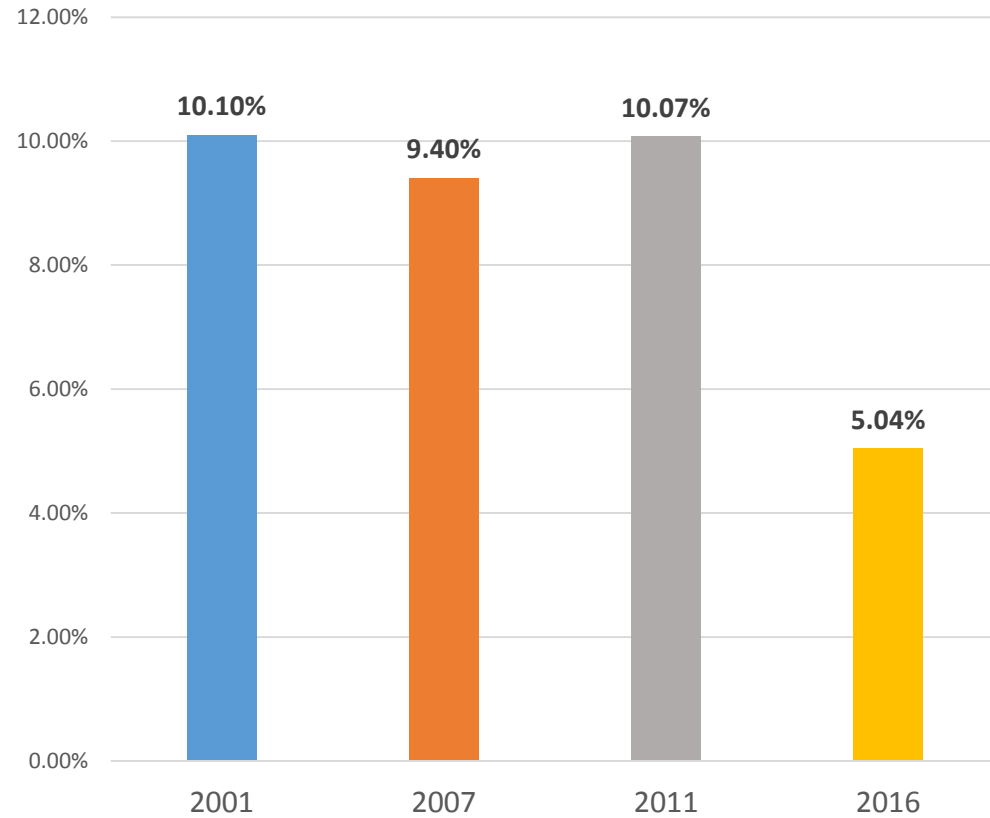
House or brick structure on a separate stand of yard



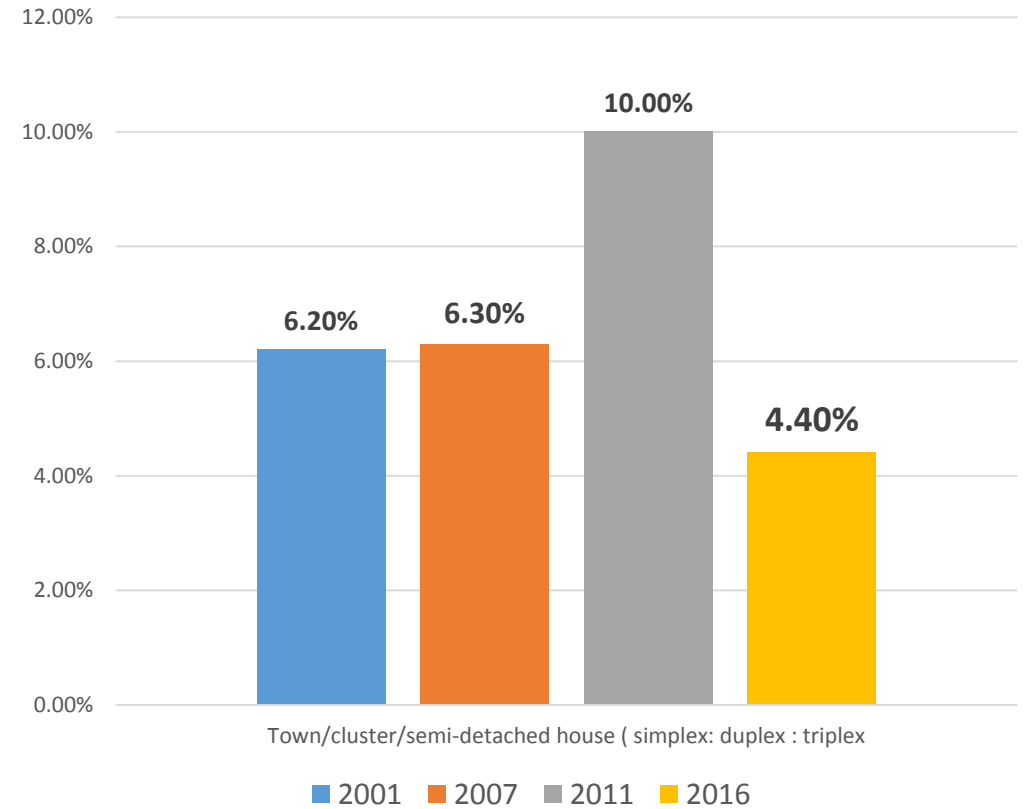
Traditional dwelling/hut/structure made of traditional materials



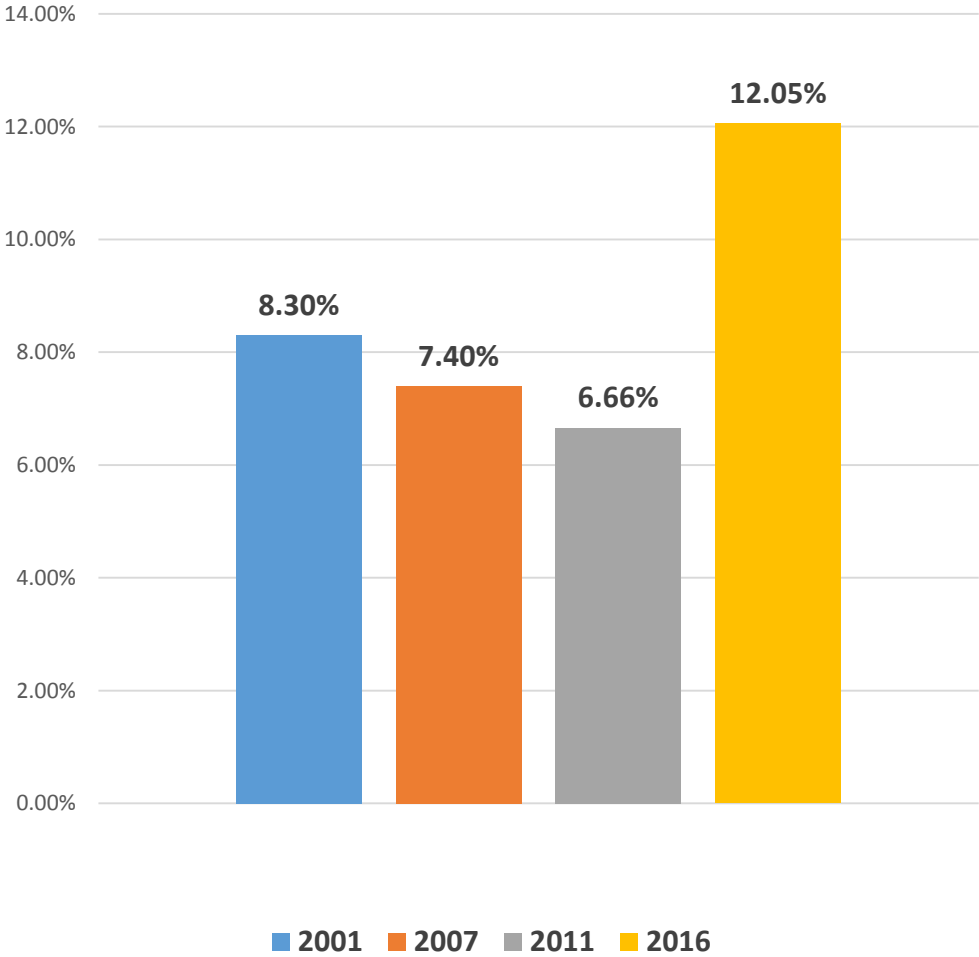
Flat or apartment in a block of flats



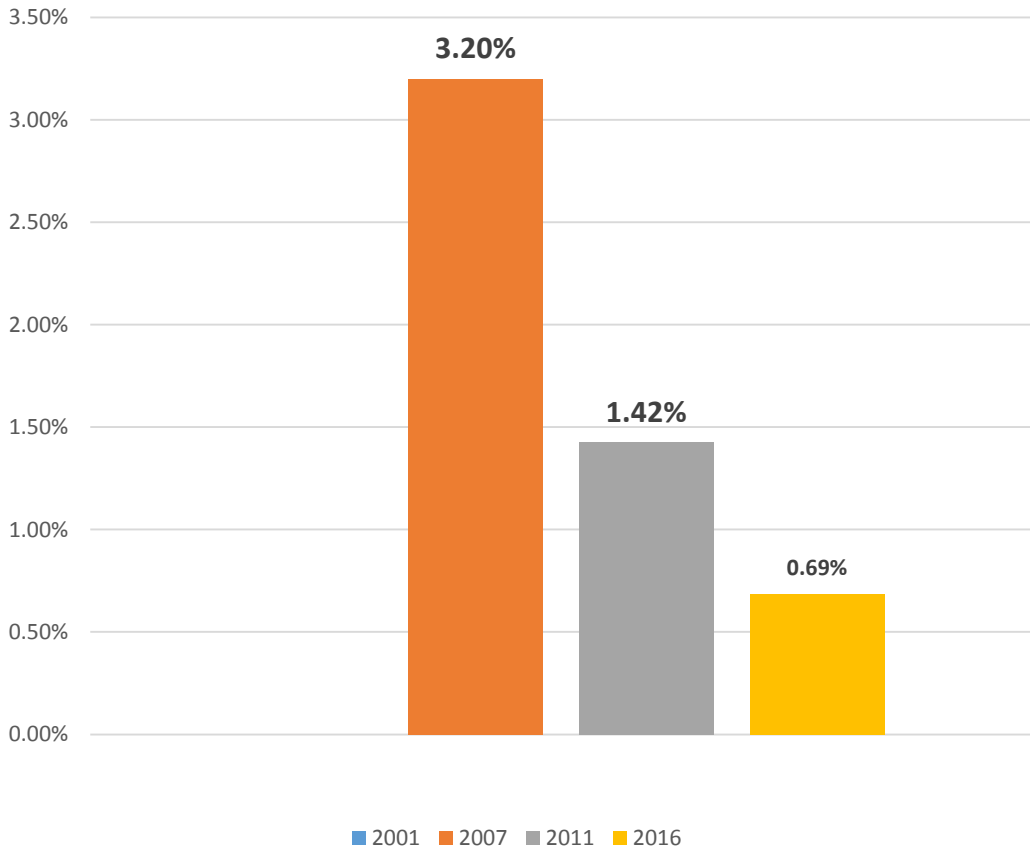
Town/cluster/semi-detached house (simplex: duplex : triplex)



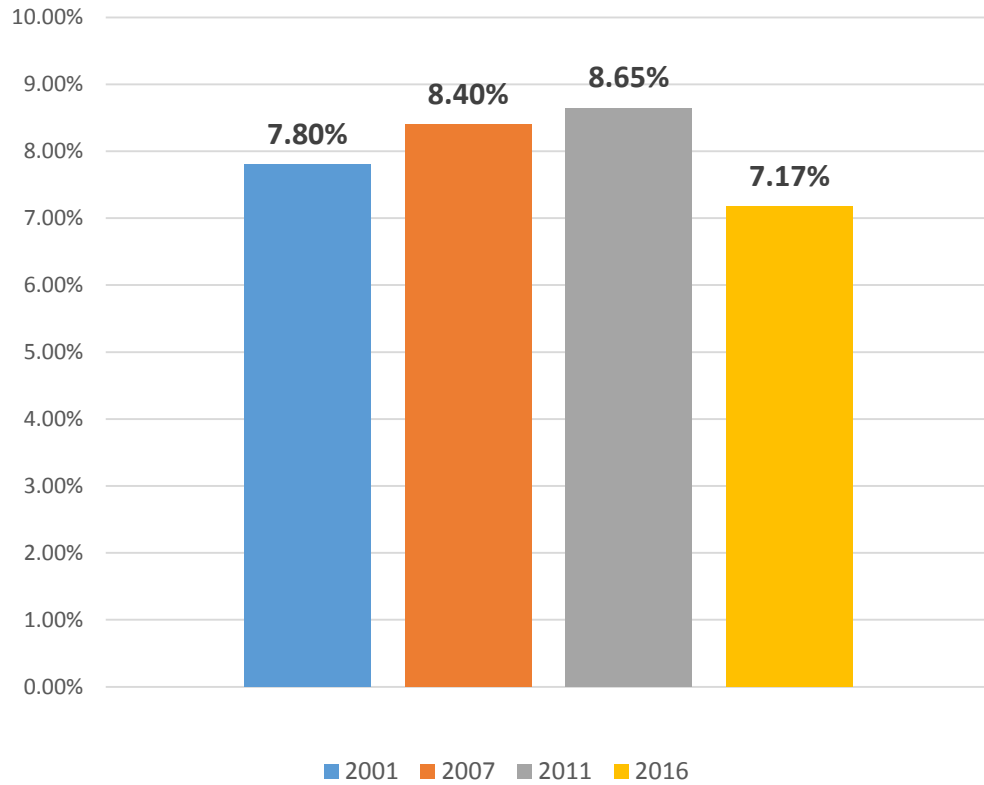
House/flat/room in backyard



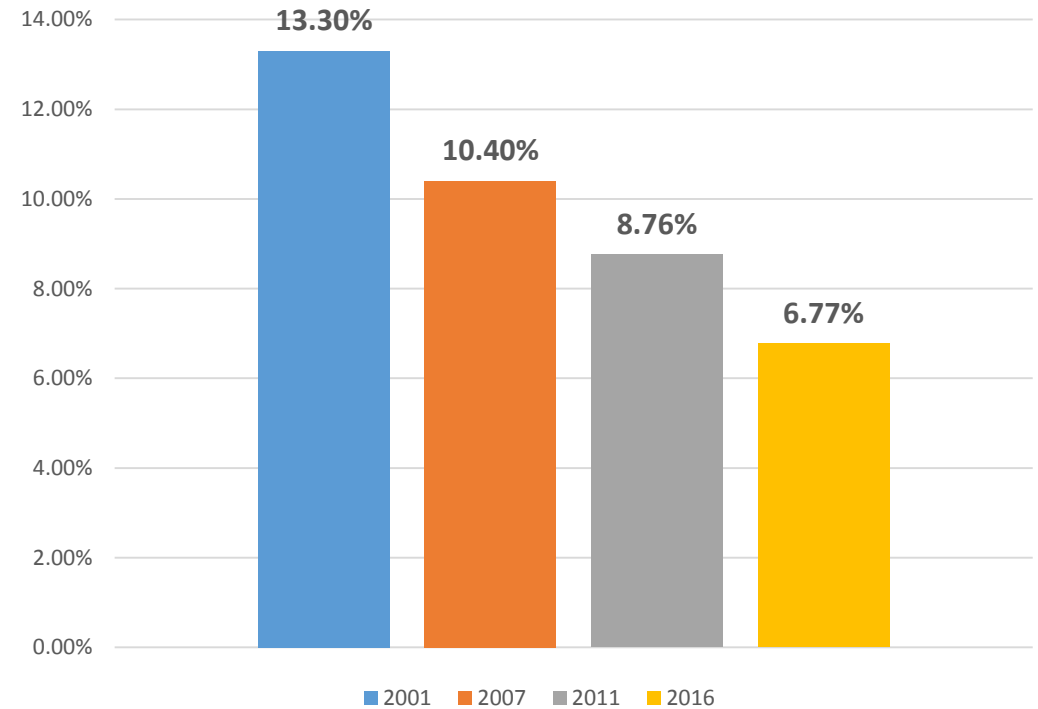
Room/flatlet on a property or larger dwelling/servants quarters/granny flat



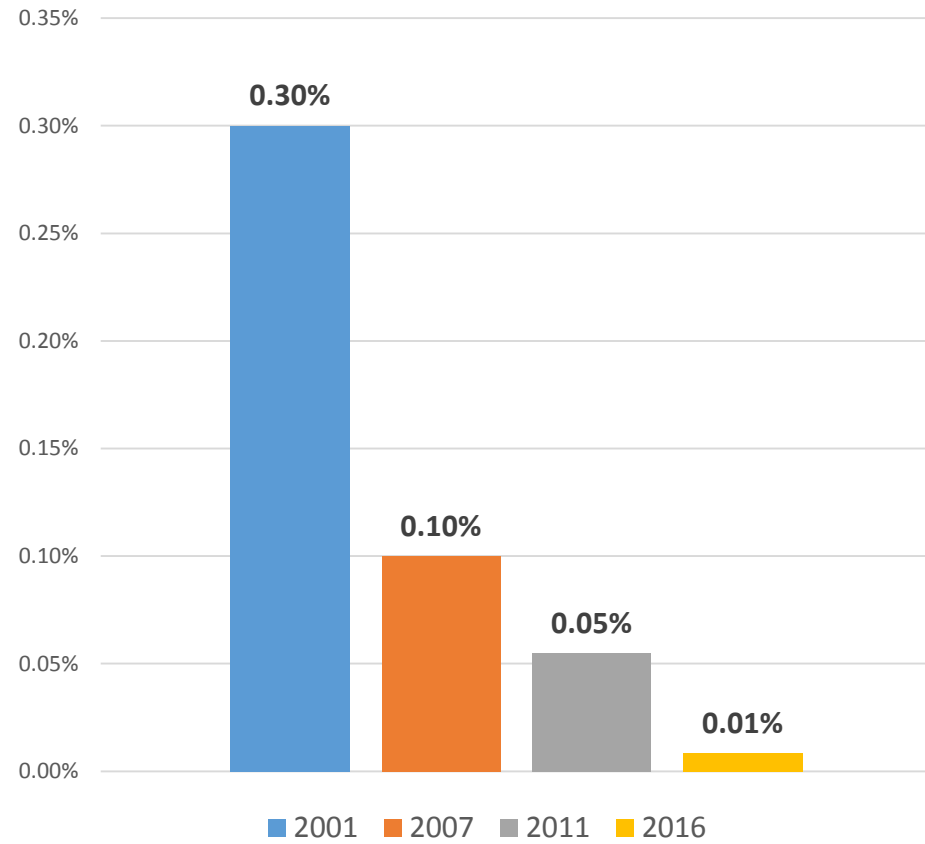
Informal dwelling (shack; in backyard)



Informal dwelling (shack; not in backyard; e.g. in an informal/squatter settlement or on a farm)



caravan/tent



Food security

Food Security

| | Indicator | 2009 | 2010 | 2011 | 2012 * | 2015 ** |
|-------------|--|-------|-------|-------|--------|---------|
| Food Access | Proportion of households with severely inadequate access to food | 4.8% | 4.7% | 5.9% | 5.3% | 3.2% |
| | Proportion of households with inadequate access to food | 12.7% | 12.9% | 12.6% | 13.1% | 14.8% |
| | Proportion of households with adequate access to food | 82.6% | 82.4% | 81.5% | 81.7% | 82% |

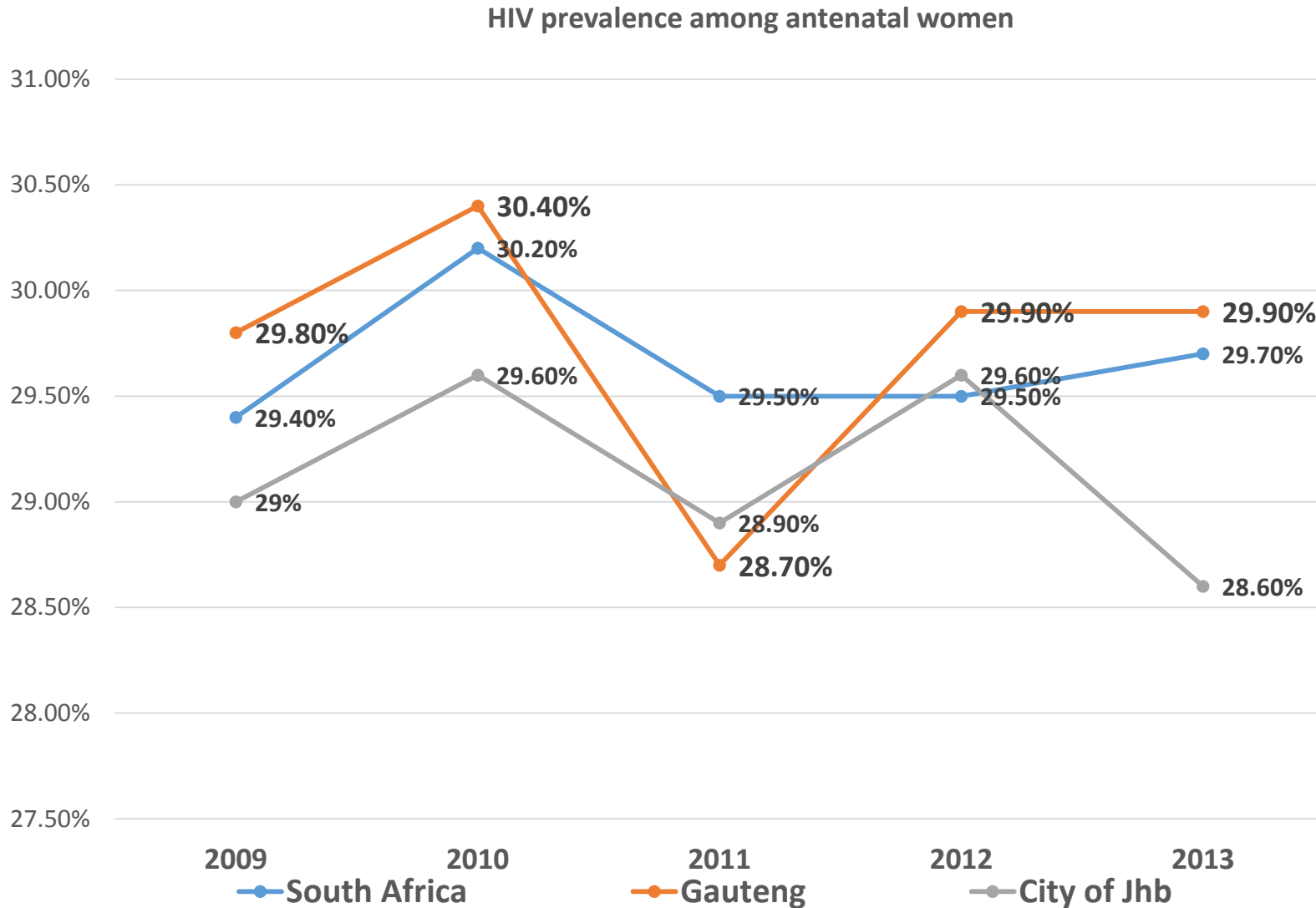
- The 2015 General household survey reported that an estimated 18% of city dwellers have inadequate or severely inadequate food access.
- This contributes to massive social costs in the form of healthcare, loss of productivity and earnings, social tension and compromised educational attainment. This challenge is further exacerbated by the fact that the majority of the urban poor live far from the city centre, with much of their income spent on transport and food.
- The reduce food insecurity , the City needs to implement the following:
 - The maintenance of open green spaces and the enhancement of vegetation and water infiltration;
 - Cities are also recommended to engage in City-to-city co-operations and to also form partnerships with (Sub) national governments, Civil society and non-governmental organisation and the private sector to improve urban infrastructure, living conditions and health.
 - The coordination and establishment of profitable and sustainable agricultural projects on land owned by the City and private land owners in the southern areas of Johannesburg with a focus on addressing food security and unemployment

*Gauteng province **City of Johannesburg

Source: Statistics South Africa

Health

Health: HIV Prevalence among antenatal women



- HIV/AIDS Prevalence is defined as the number (%) of cases of a disease / condition in a given population at a particular point in time.
- The National Antenatal Sentinel HIV & Syphilis Prevalence Survey conducted in October 2013 provides the latest estimates of HIV prevalence among antenatal women for Metros, provinces and South Africa.
- HIV prevalence amongst antenatal women in the City has declined from 29% in 2011 to 28.6% in 2013.
- Reducing the HIV/AIDS prevalence by the City should include the development of coordinated responses with NGOs to scale up ARV delivery. HIV in the short to medium-term will also be addressed through dealing with the often-neglected social and psychological contexts that place vulnerable groups such as women and children at higher risk.

Source: National Antenatal Sentinel HIV & Syphilis Prevalence Survey in South Africa, National Department of Health.

Eco mobility

Public Transport use in the City

Train = 778

Minibus/taxi = 9681

Bus = 898

- The majority of Johannesburg's residents do not own cars and rely on subsidised buses, commuter trains, and mostly, on private mini-bus taxis.
- On average there are 9.6 million trips made by commuters travelling on minibuses or taxis each month versus the 778 000 and 898 000 trips made by commuters using trains and buses respectively.
- Given the inadequate road infrastructure in the City needs to continue to invest in reliable and affordable public transportation going forward.

of passenger trips made per month with each public transport mode N ('000)

Source: Statistics South Africa

Data sources

- 1996 South Africa's census
- 2001 South Africa's census
- 2007 Community Survey
- 2016 community survey
- Quantec easydata
- IHS Global Insight
- National Department of Health.



Group Strategy, Policy
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