

REPORT 2

EMFULENI LOCAL MUNICIPALITY

2015 LED STRATEGY

**SOCIO-ECONOMIC ANALYSIS STATUS QUO
REPORT**

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1. INTRODUCTION

The North-West University (NWU), Vaal Campus, through its Local Economic Development unit known as AppLED, was appointed to compile a revised LED strategy for the Emfuleni Local Municipal area. The NWU has recently completed LED strategies for Fezile Dabi District Municipality and Metsimaholo Local Municipality. Overall deliverables include a policy analysis status quo report, a socio-economic status quo report, an economic sectoral modelling report and a strategy report.

This socio-economic analysis status quo report consists of an analysis of data that could have an impact on local economic development in the Emfuleni area. This report is followed by a sectoral analysis report of the Emfuleni municipal area.

The socio-economic analysis compares the Emfuleni municipal area with Gauteng Province, the Sedibeng District area and Metsimaholo municipal area. The aim of the LED strategy is to base economic planning on recent information and that specific strategies and projects be implementable. The latest information and data has been used to compile this report. The main sources used were the Global Insight Regional Explorer 2013 and Statistics South Africa, Census 2011. Data were analysed and raw data were compiled in order to guide decision makers.

2. POPULATION

In this section the total population, population, growth, and household size by population group within Gauteng, Sedibeng District Municipality, Metsimaholo Local Municipality and Emfuleni Municipality will be analysed. The analysis will be done for the years 2001, 2005, 2010, 2011, 2013.

Table 1: Total Population

Area	2001	2005	2011	2013
Gauteng	9 305 782	10 273 332	12 065 885	12 712 810
Sedibeng DM	784 193	821 472	912 196	942 470
Metsimaholo LM	121 530	130 471	150 876	157 233
Emfuleni LM	645 342	665 421	715 077	731 965

Findings:

- All areas showed growth in total population from 2001 to 2013.
- Gauteng experienced growth in total population of 36.3% from 2001 to 2013, Sedibeng 20.2%, Metsimaholo 29.4% and Emfuleni grew the lowest by 13.4% over the period.
- In 2001 Emfuleni contributed 6.9% to Gauteng’s population and 5.8% in 2013.
- In 2001 Emfuleni contributed 82.3% to Sedibeng’s population and 77.7% in 2013.
- The population data for Sedibeng, Metsimaholo and Emfuleni are graphically illustrated in Figure 1.
- Census 2011 indicates that the Emfuleni population was 721 663 and the Metsimaholo population 149 108 during the year 2011.

Figure 1: Total Population

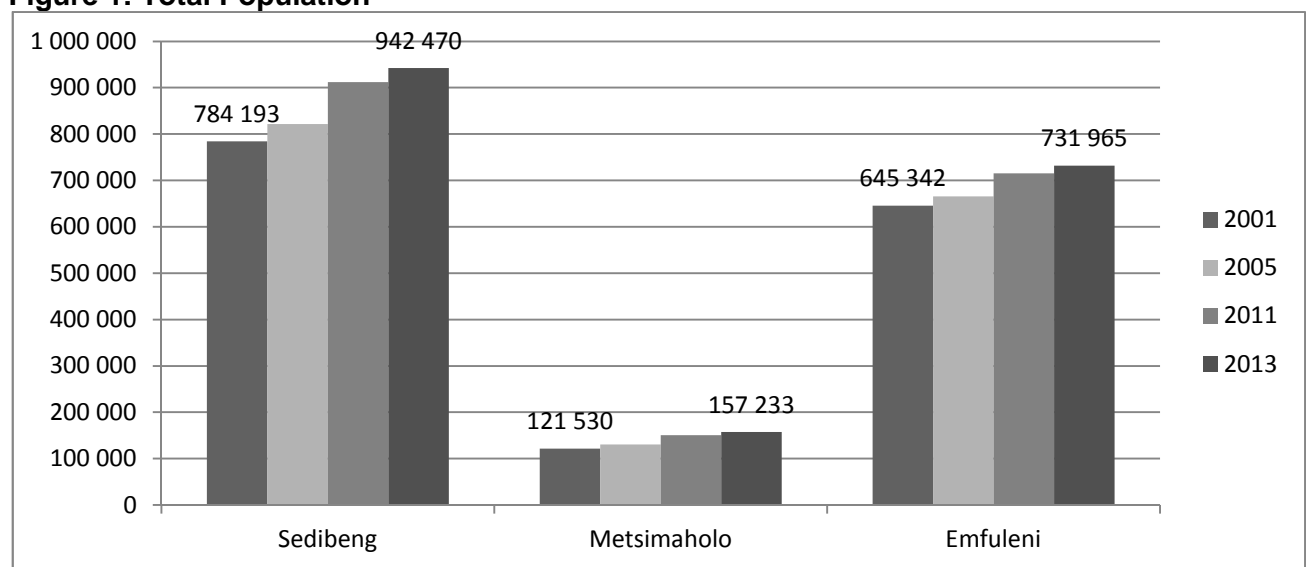


Table 2: Population by Race Group

Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	African	6 742 490	620 470	94 890	527 808
	White	1 994 556	147 616	25 871	104 154
	Coloured	337 918	8 882	555	7 115
	Asian	230 819	7 224	213	6 265
	Total	9 305 783	784 192	121 529	645 342
Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2011	African	9 415 225	751 056	123 467	614 556
	White	1 882 538	141 011	25 852	85 396
	Coloured	425 737	11 371	1 099	8 344
	Asian	342 385	8 758	458	6 781
	Total	12 065 885	912 196	150 876	715 077
Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2013	African	10 030 725	781 060	129 278	633 967
	White	1 869 669	140 484	26 225	82 615
	Coloured	440 998	11 810	1 213	8 518
	Asian	371 418	9 116	516	6 865
	Total	12 712 810	942 470	157 232	731 965

Findings:

- Emfuleni contributed 7% to Gauteng's total population and 82% of Sedibeng's total population in 2001.
- In 2013 Emfuleni contributed 6% to Gauteng's total population (decreased by 1% from 2001) and 78% of Sedibeng's total population (declined by 4% from 2001).
- If race group figures of Emfuleni are compared to Gauteng, the following is noted: The African group formed 8% of Gauteng's figures during 2001, White group 5%, Coloured group 2% and Asian group also 3%.
- If the same figures are calculated for 2013, the following is noted: the African groups contribution decreased from 8% to 6% as a proportion of Gauteng figures, the White group decreased from 5% to 4%, the Coloured group remained at 2% and Asian group also decreased from 3% to 2%.
- It can also be noted that if headcount figures are compared, all groups except the White group grew during each period.
- This is illustrated in Figure 2.

Figure 2: Population by race group for the Emfuleni Municipal Area

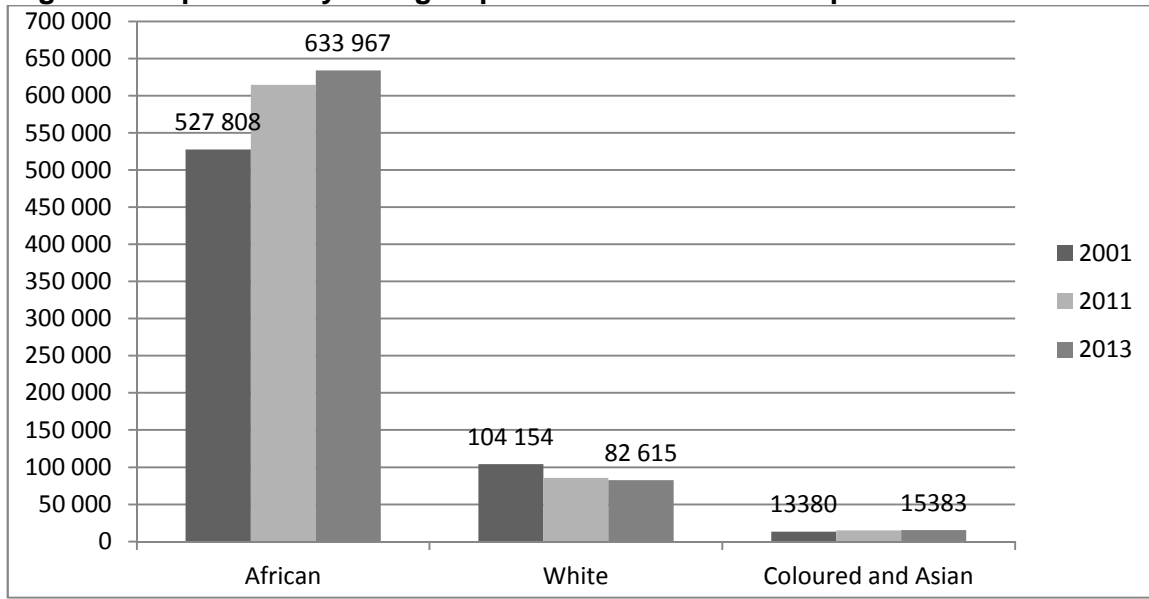


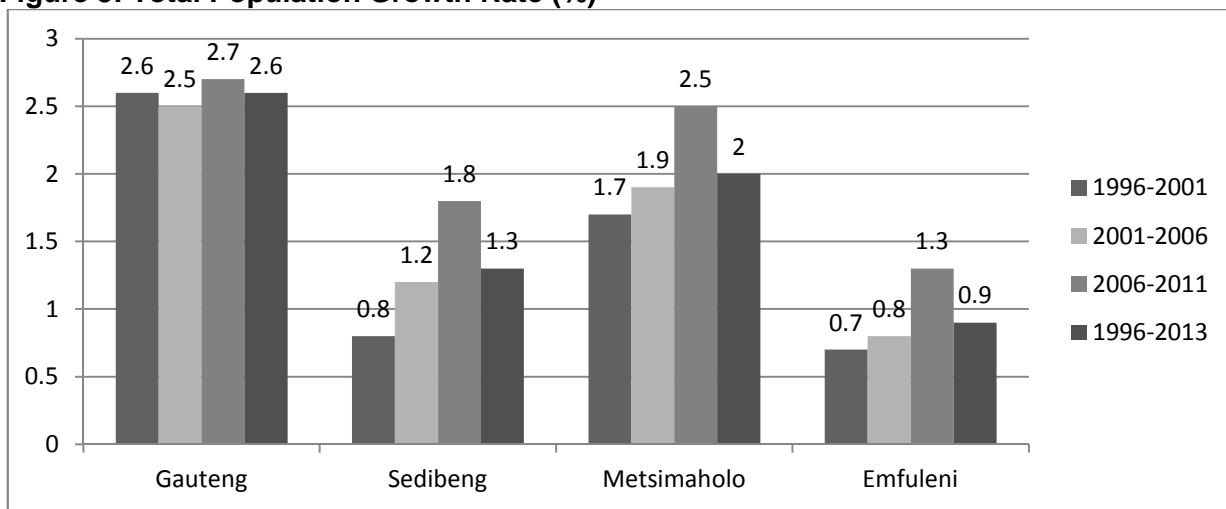
Table 3: Population Growth Rate by Race Group

Area	1996-2013 (%) growth rate				2013 (%) growth rate			
	African	White	Coloured	Asian	African	White	Coloured	Asian
Gauteng	3.5	-0.5	2.2	3.9	3.1	-0.3	1.7	4.0
Sedibeng DM	1.9	-1.3	2.7	1.7	2.0	-0.2	1.9	2.0
Metsimaholo LM	2.8	-0.9	6.3	7.9	2.2	0.6	4.8	5.4
Emfuleni LM	1.5	-2.2	1.6	1.1	1.6	-1.6	1.0	0.6

Findings:

- During the period 1996-2013 Gauteng experienced the highest growth rate in the African group (3.5%), while for Emfuleni, the African population only grew by 1.5%.
- All areas experienced a negative growth rate during the same period for the White group.
- These trends are similar for 2013 with the Emfuleni area with relative low growth rates.

Figure 3: Total Population Growth Rate (%)



Findings:

- Figure 3 shows the growth rates for total population figures for the various areas for combined periods.
- The period between 2006 and 2011 experienced the highest growth rate for all the areas.
- If the Emfuleni area is compared with the other areas, it shows the lowest total population growth rate for the period 1996 to 2013.

Table 4: Number of Households

Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	African	2 070 774	171 679	27 921	145 441
	White	700 222	47 887	7 576	34 645
	Coloured	79 950	2 215	151	1 828
	Asian	63 447	1 797	100	1 585
	Total	2 914 393	223 578	35 748	183 499
Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2010	African	2 966 186	230 070	36 429	188 122
	White	673 248	45 238	8 634	28 615
	Coloured	113 440	3 243	285	2 452
	Asian	92 953	2 206	200	1 735
	Total	3 845 827	280 757	45 548	220 924
Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2011	African	3 052 004	235 057	37 436	191 391
	White	669 391	44 967	8 904	27 959
	Coloured	115 955	3 320	292	2 485
	Asian	95 272	2 216	197	1 708
	Total	3 932 622	285 560	46 829	223 543
Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2013	African	3 254 264	248 814	40 213	201 178
	White	655 331	45 862	9 701	27 786
	Coloured	120 944	3 367	344	2 478
	Asian	99 897	2 262	222	1 693
	Total	4 130 436	300 305	50 480	233 135

Findings:

- Emfuleni made up 6% of Gauteng number of households and 82% of Sedibeng total population in 2001.
- In 2013 Emfuleni made up 6% of Gauteng total population (same as 2001) and 78% of Sedibeng total population (declined by 4% from 2001).
- If group figures of Emfuleni are compared to Gauteng the following is noted: the African group formed 7% of Gauteng's figures during 2001, White group 5%, Coloured group 2% and Asian group also 2%.
- If the same figures are calculated for 2013, the following is noted: the African group's contribution decreased from 7% to 6% as proportion of Gauteng, White group decreased

from 5% to 4%, Coloured and Asian group's remained at 2%. These figures are similar to the total population per group data discussed in Table 2 and Figure 2.

- The total number of households per area is illustrated in Figure 4.

Figure 4: Total Number of Households

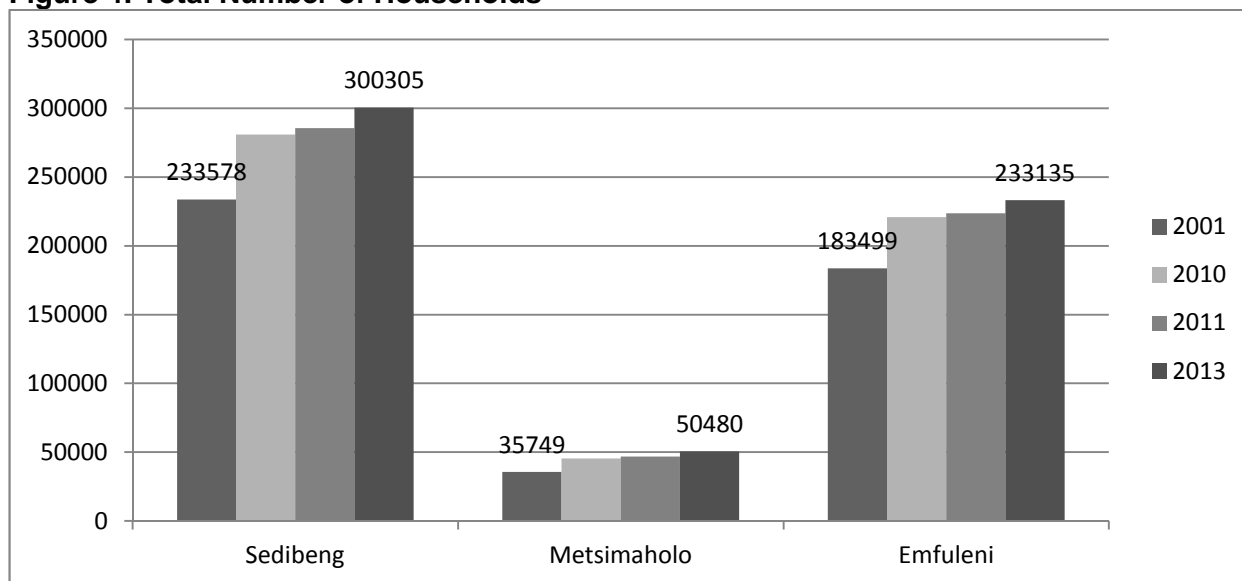


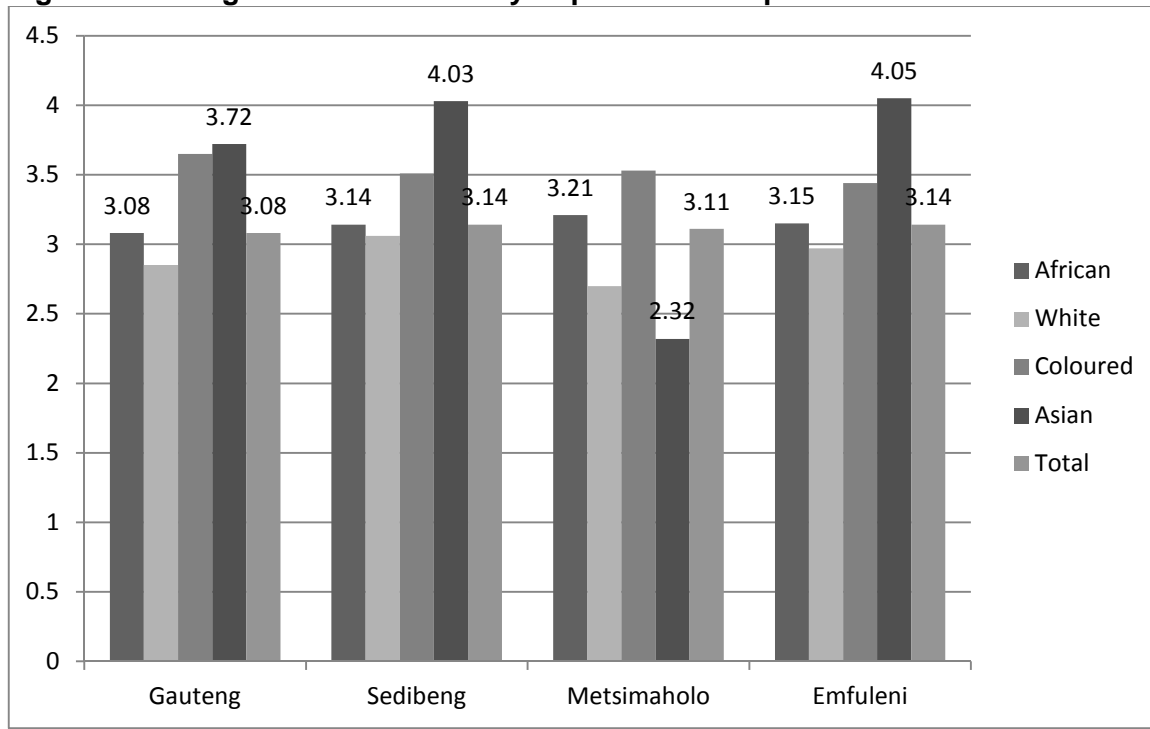
Table 5: Average Households Size by Population Group

Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	African	3.26	3.61	3.40	3.63
	White	2.85	3.08	3.41	3.01
	Coloured	4.23	4.01	3.68	3.89
	Asian	3.64	4.02	2.13	3.95
	Total	3.19	3.51	3.40	3.52
2013	African	3.08	3.14	3.21	3.15
	White	2.85	3.06	2.70	2.97
	Coloured	3.65	3.51	3.53	3.44
	Asian	3.72	4.03	2.32	4.05
	Total	3.08	3.14	3.11	3.14

Findings:

- During 2001 the average household size in Emfuleni was larger than the average household size in Gauteng. It was however similar that the size within Sedibeng.
- During 2013 the average household size in Emfuleni was also larger than the average household size in Gauteng but the difference compared to 2001 was smaller. It was once again the same as within Sedibeng.
- The average household size by population group is graphically illustrated in Figure 2.5.
- It should be noted that 36.3% of households are headed by females in the Emfuleni area.

Figure 5: Average Household Size by Population Group for 2013



The main languages in the Emfuleni area are listed in Table 6.

Table 6: Main languages in Emfuleni compared with Metsimaholo area, 2011

Home language	Emfuleni LM (%)	Metsimaholo LM (%)
Sesotho	52.0	57.9
Afrikaans	12.4	16.2
IsiZulu	13.0	6.0
IsiXhoza	7.8	7.4

The population age distribution is listed below in Table 7.

Table 7: Age distribution in Emfuleni compared to Metsimaholo area, 2011.

Age category	Emfuleni LM (%)	Metsimaholo LM (%)
Younger than 15 years	25.6	26.3
Between 15 and 64 years	69.5	69.3
Older than 65 years	4.9	4.4

3. SOCIAL DEVELOPMENT

The following section provides a summary of social development aspects such as human development index (HDI), Gini-Coefficient index, poverty index, literacy rates and population densities. In terms of the 2011 census, the dependency ratio per 100 people for Emfuleni was 43.8 (42.8) and for Metsimaholo it was 44.3 (45.7). The ratio for 2001 is listed in brackets.

Table 8: Human Development Index (HDI): 2001-2013

Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	African	0.56	0.52	0.5	0.53
	White	0.87	0.83	0.82	0.83
	Coloured	0.67	0.6	-	0.61
	Asian	0.77	0.73	-	0.73
	Total	0.67	0.61	0.59	0.61
2011	African	0.62	0.59	0.56	0.59
	White	0.88	0.85	0.86	0.85
	Coloured	0.71	0.67	0.7	0.67
	Asian	0.81	0.76	-	0.77
	Total	0.69	0.65	0.63	0.65
2013	African	0.63	0.6	0.57	0.6
	White	0.89	0.86	0.87	0.86
	Coloured	0.71	0.68	0.7	0.7
	Asian	0.81	0.78	-	0.78
	Total	0.70	0.67	0.64	0.66

Findings:

- Human Development Index (HDI) is an index for measuring human development on the basis of four indicators covering life expectancy, adult literacy, education enrolment ratios and gross domestic product per capita as calculated by the UN. A score of 1 indicates high levels of human development, while a score or close to 0 indicates low levels of human development.
- The HDI values have increased from 2001 to 2013 in all areas and across all races. It has increased by 8.2 percent in the Emfuleni municipal area, 8.5 percent in the Metsimaholo Municipal area, 9.8 percent in the Sedibeng District area and 6.1 percent in the Gauteng Province over this period. The Emfuleni area has therefore shown higher levels of increases over the period if compared to the province.
- The Emfuleni Municipal area has the lowest level of human development (HDI=0.66) compared to the Sedibeng district area (HDI=0.67) and Gauteng province (HDI=0.70). However, the Emfuleni Municipal area has a better human development index (HDI=0.66) if compared to the Metsimaholo Municipal area (HDI=0.64).
- The race distribution of human development indicates that the African population has the lowest level of human development compared to other races in the Emfuleni Municipal area as well as across all considered areas. This situation needs to be addressed by improving

the access to health care, education and living standards in general. On the contrary, the White population has the highest level of human development.

Table 9: Gini-Coefficient: 2001-2013

Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	African	0.59	0.58	0.57	0.58
	White	0.47	0.49	0.46	0.48
	Coloured	0.59	0.63	-	0.62
	Asian	0.52	0.51	-	0.51
	Total	0.64	0.63	0.63	0.63
2011	African	0.58	0.56	0.55	0.56
	White	0.42	0.42	0.41	0.42
	Coloured	0.55	0.57	-	0.57
	Asian	0.45	0.44	-	0.44
	Total	0.64	0.62	0.62	0.61
2013	African	0.56	0.54	0.53	0.54
	White	0.39	0.4	0.38	0.39
	Coloured	0.54	0.57	-	0.57
	Asian	0.43	0.42	-	0.41
	Total	0.63	0.61	0.60	0.60

Findings:

- The Gini-Coefficient measures the extent to which the distribution of income (or, in some cases consumption expenditure) among individuals or households within an economy deviates from a perfectly equal distribution. A Gini index of 0 represents perfect equality and a value of 1 represents perfect inequality. The higher the value above 0, the higher the inequality.
- Even though from 2001 to 2013, the level of income inequality has decreased in all considered areas (Emfuleni Local Municipality included) and across all races, the Gini-Coefficient is high ranging between 0.60 and 0.63. It has declined by 4.8 percent in the Emfuleni Municipal area and the Metsimaholo Municipal area while it has only declined by 3.2 percent in the Sedibeng District and 1.6 percent in the Gauteng Province.
- The Emfuleni Local Municipality has the lowest income inequality when compared to Sedibeng district area (0.61) and the entire Gauteng Province (0.63). However, Emfuleni has a similar level of income inequality if compared to the neighbouring local municipality of Metsimaholo (0.60).
- The highest level of income inequality is found amongst the Coloured group, followed by the African group, while the White population have the lowest Gini-Coefficient within the Emfuleni Municipal area as well as in all areas as compared.

Table 10: Number of people living in poverty: 2001-2013

Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	African	2 491 265	287 410	42 647	244 861
	White	60 067	5 811	962	3 725
	coloured	86 894	3 608	156	2 728
	Asian	22 499	734	0	635
	Total	2 660 725	297 563	43 765	251 949
2011	African	3 464 839	318 459	50 077	264 004
	White	66 785	5 197	770	2 822
	coloured	115 096	3 975	246	2 932
	Asian	47 935	1 185	7	866
	Total	3 694 655	328 816	51 100	270 624
2013	African	3 882 283	352 791	56 674	291 982
	White	66 916	4 906	823	2 513
	coloured	122 588	4 164	293	3 028
	Asian	46 612	1 075	14	740
	Total	4 118 399	362 936	57 804	298 263

Findings:

- The overall number of people living in poverty has increased from 2001 to 2013 in the Emfuleni Municipal area. This is also the case for all the other areas in comparison where there is a general increase as seen in Gauteng province and Sedibeng district as well as in the neighbouring Metsimaholo Municipal area.
- More specifically, the number of people living in poverty has increased by 21.8 percent from 2001 to 2013 in the Emfuleni Municipal area. This increase is however the lowest if compared to the Gauteng province (65.3%), Sedibeng District area (26.3%) and Metsimaholo Municipal area (35.5%).
- Poverty distribution by race shows that the African population in the Emfuleni Municipal area hold the largest share of the poor, while their number has also increased from 2001 to 2013. Contrary, the number of poor White population has been decreasing. The Emfuleni municipal area shares this situation with other areas in comparison.
- According to census 2011, the poverty rate for Emfuleni was 45.8% in 2011 and for Metsimaholo it was 42.4%.

For a better understanding, note that this increase in number of people living in poverty has to be linked with the population growth.

Table 11: Poverty Gap (R 000 000): 2001-2013

Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	African	3 075	353	51	306
	White	61	6	1	4
	coloured	99	4	0	3
	Asian	22	1	0	1
	Total	3 257	364	52	314
2011	African	9513	844	127	706
	White	33	3	0	1
	coloured	297	10	1	7
	Asian	115	3	0	2
	Total	9 958	860	128	716
2013	African	12 354	1 102	170	919
	White	42	3	1	2
	coloured	342	12	1	8
	Asian	124	3	0	2
	Total	12 862	1 120	172	931

Findings:

- In general, from 2001 to 2013, the poverty gap has increased in the Emfuleni Municipal area and in all other considered areas. Specifically, the poverty gap in the Emfuleni Municipal area has tripled (increased by 204.2%) over the period from 2001 to 2013, which denotes that poor people get poorer and poverty get deeper. The Emfuleni area does not present a unique case as the situation is worse in the Gauteng Province (poverty gap increased by 318.3%), Sedibeng District area (poverty gap increased by 207.7), and the Metsimaholo Municipal area (poverty gap increased by 230.8%).
- From 2001 to 2013, the poverty gap has increased among African, Coloured and Asian while it has been decreasing amongst the White population. The Emfuleni area shares this situation with the entire Gauteng Province and Sedibeng District area. But in the Metsimaholo municipal area, the poverty gap increased among African and Coloured while it remained unchanged among White and Asian population over the considered years.
- The poverty gap distribution by race shows that the African population has the highest poverty gap shown by the highest average shortfall of the total population from the poverty line (R 919 000 000). In other words, African population below the poverty line are further away from the poverty line compared to the other races of population living below the poverty line. This situation implies that more resources are needed to be channelled to this particular group in order to be lifted from poverty.

Note that this increase in poverty gap might be delivered from the fact that the number of people living in poverty has increased and/or that poor people get poorer.

Table 12: Illiterate (Functional literacy: 15+, completed grade 7 or higher): 2001-2013

Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	African	1 166 937	119 308	22 139	92 850
	White	35 540	3 268	439	2 234
	coloured	24 195	1 216	111	824
	Asian	12 480	410	5	352
	Total	1 239 152	124 202	22 694	96 260
2011	African	816 101	79 110	15 993	58 901
	White	20 241	2 070	279	1 273
	Coloured	13 632	689	69	433
	Asian	10 969	374	29	259
	Total	860 943	794 243	16 370	60 866
2013	African	793 286	76 016	15 349	56 003
	White	21 794	2 367	328	1 384
	Coloured	13 165	678	63	423
	Asian	12 208	406	30	269
	Total	840 454	79 467	15 770	58 079

Findings:

- The Emfuleni Municipal area shares a similar trend with the entire Gauteng province, Sedibeng district area and neighbouring Metsimaholo Municipal area, where the number of illiterate people has decreased from 2001 to 2013 across all races.
- From 2001 to 2013, the number of illiterate people has declined by 39.7 percent in the Emfuleni Municipal area while on the provincial level, it has only declined by 32.2 percent, 36.0 percent on the district level and 30.5 percent in the Metsimaholo Municipal area.
- The race distribution of illiterate people shows that African population has the largest number of illiterate people in the Emfuleni Municipal area as well as in other compared areas.

Table 13: Population density (number of person per km²): 2000-2013

Year	Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2000	African	357.62	145.49	53.62	537.73
	White	110.24	36.26	15.54	110.69
	coloured	18.10	2.05	0.30	7.19
	Asian	12.28	1.71	0.11	6.39
	Total	498.24	185.51	69.57	662.00
2011	African	516.96	179.47	71.78	635.11
	White	103.36	33.70	15.03	88.25
	coloured	23.38	2.72	0.64	8.62
	Asian	18.80	2.09	0.27	7.01
	Total	662.50	217.98	87.72	738.99
2013	African	550.76	186.64	75.16	655.17
	White	102.66	33.57	15.25	85.38
	coloured	24.21	2.82	0.71	8.80
	Asian	20.39	2.18	0.30	7.09
	Total	698.02	225.21	91.42	756.44

Findings:

- From 2000 to 2013, the population density has increased in the Emfuleni Municipal area (by 14.3%) as well as in all compared areas (40.1 % for Gauteng, 21.4 % for Sedibeng DM and 31.4 % for Metsimaholo LM).
- The Emfuleni Municipal area has the largest population density (756.44 person/km²) compared to the provincial level (698.02 person/km²) and district level (225.21 person/km²) as well as the neighbouring municipal area of Metsimaholo (91.42 person/km²).
- The trend of population density across races shows that the White population group presents a particular case where their population density have decreased from 2000 to 2013 while it has been increasing among other races (African, Coloured and Asian).
- The race distribution of population density indicates that African population has the highest population density (756.44 person/km²) compared to other races in the Emfuleni Municipal area as well as in all considered areas.

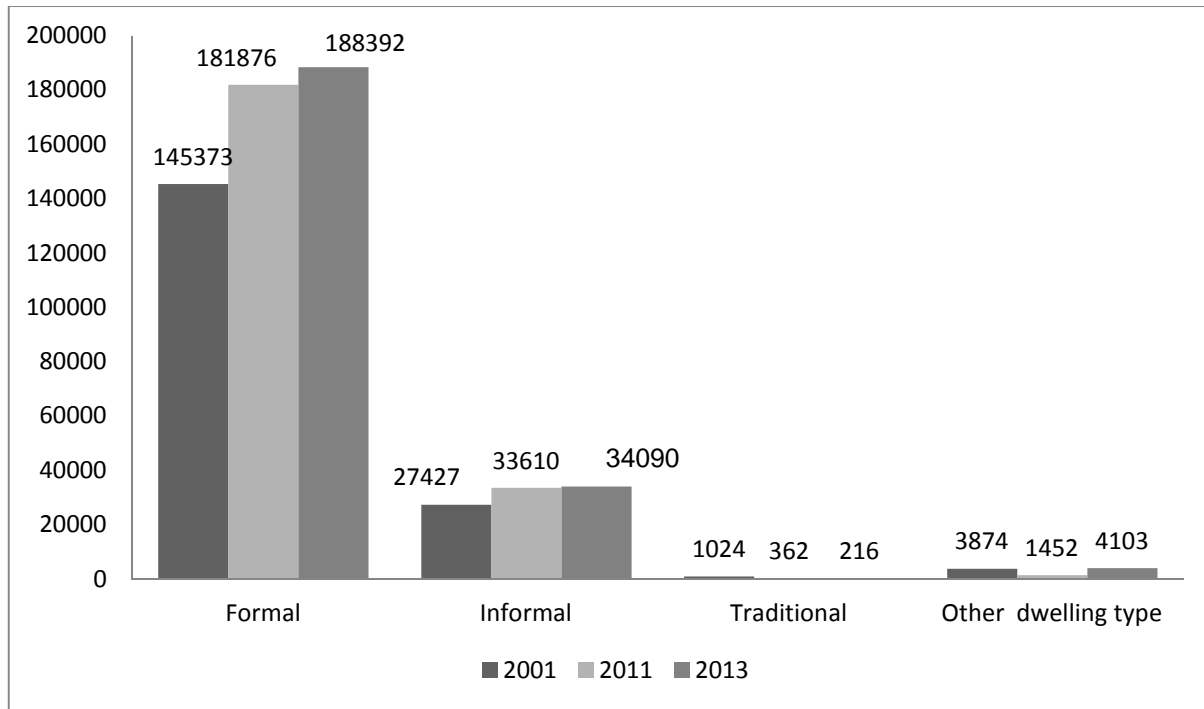
4. HOUSING INFRASTRUCTURE

This section analyses the number and type of dwellings people resides in. According to Census 2011, the percentage of home ownership was 48.9% (56.5%) in Emfuleni and 57.3% (43.2%) in the Metsimaholo area. Data for 2011 are listed in brackets.

Table 14: Number of households by type of dwelling unit: 2001-2013

Year	Dwelling types	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	Formal	2102146	175949	24576	145373
	Informal	555904	33234	8114	27427
	Traditional	14908	1556	447	1024
	Other dwelling type	166363	5771	2612	3874
	Total	2839321	216510	35749	177698
2011	Formal	2974822	230186	39126	181876
	Informal	798376	44422	6719	33610
	Traditional	6980	511	163	362
	Other dwelling type	53541	2465	821	1452
	Total	3833719	277584	46829	217300
2013	Formal	3165859	238513	43325	188392
	Informal	808601	46199	6139	34090
	Traditional	7676	499	165	216
	Other dwelling type	46509	6934	851	4103
	Total	4028645	292145	50480	226801

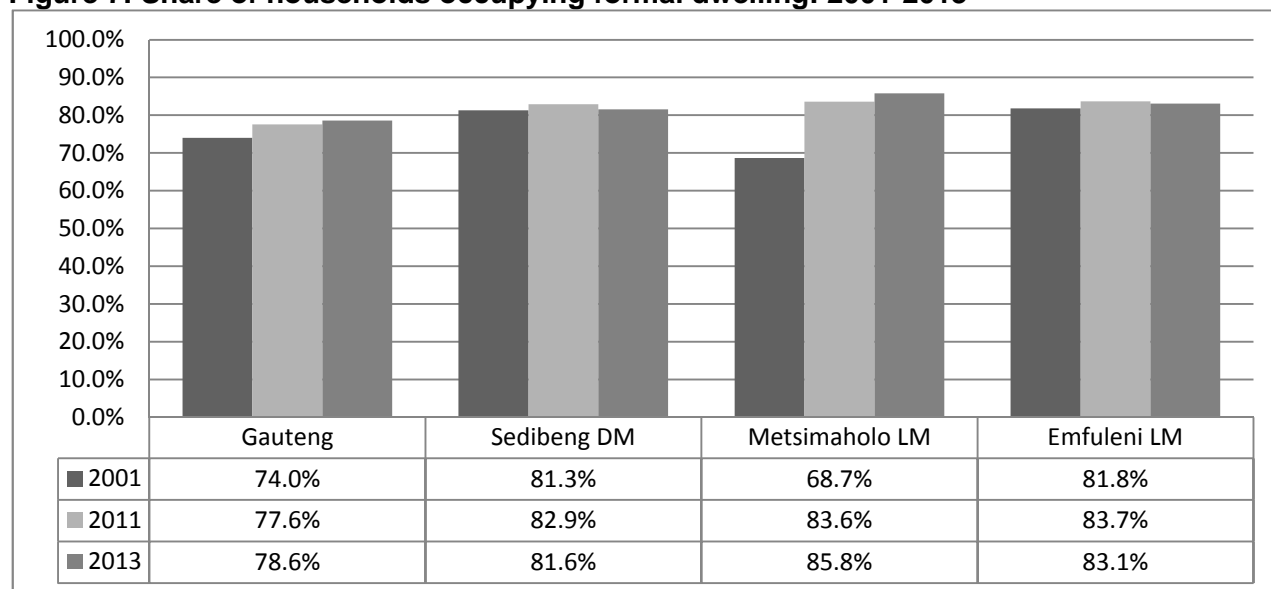
Figure 6: Number of households by type of dwelling unit in the Emfuleni Municipal area: 2001-2013



Findings:

- The number of informal dwellings has increased over time (from 2001 to 2013) in the Emfuleni Municipal area, as well as in the province of Gauteng and Sedibeng District area. However, when the Emfuleni Municipal area is compared with the Metsimaholo Municipal area, the statistics show that the number informal dwellings have decreased from 2001 to 2013.
- From 2001 to 2013, formal dwellings in the Emfuleni Municipal area have increased by 29.6 percent, informal dwellings increased by 24.35 percent and other types of dwellings increased by 5.9 percent. The number of traditional dwellings have declined by 78.9 percent, which explains why there have been increases in other remaining dwelling types.
- Traditional settlements contain the smallest number of dwellers compared to other settlements and it has been decreasing from 2001 to 2013 across all areas.

Figure 7: Share of households occupying formal dwelling: 2001-2013



Findings:

- The proportion of households occupying formal dwellings in the Emfuleni Municipal area has increased from 2001 to 2011 while in the period between 2011 and 2013 it has decreased. A similar case is found on the district level (Sedibeng), while in the Gauteng Province and the Metsimaholo Municipal area, the number of households occupying formal dwelling has steadily increased.
- The Emfuleni Municipal area has the highest percentage of households occupying formal dwelling, if compared to the provincial level (Gauteng) and district level (Sedibeng). However, the Metsimaholo municipal area has the highest proportion of households occupying formal dwelling (85.8%) compared to all areas.

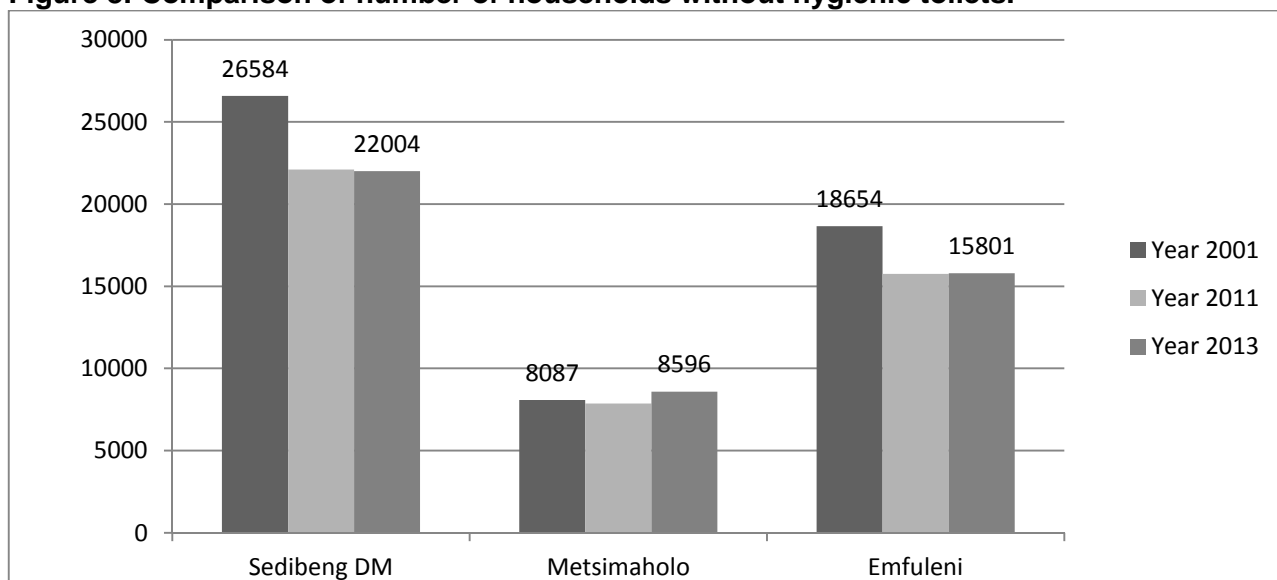
5. SERVICES

In this section the level of basic essential service provision are analysed regarding sewer, water, electricity, and waste removal. The section is completed by a composite index of provision of essential services.

Table 15: Number of households without hygienic toilets

Area	2001	2011	2013
Gauteng	360 218	343 796	345 590
Sedibeng DM	26 584	22 098	22 004
Metsimaholo LM	8 087	7 860	8 596
Emfuleni LM	18 654	15 748	15 801

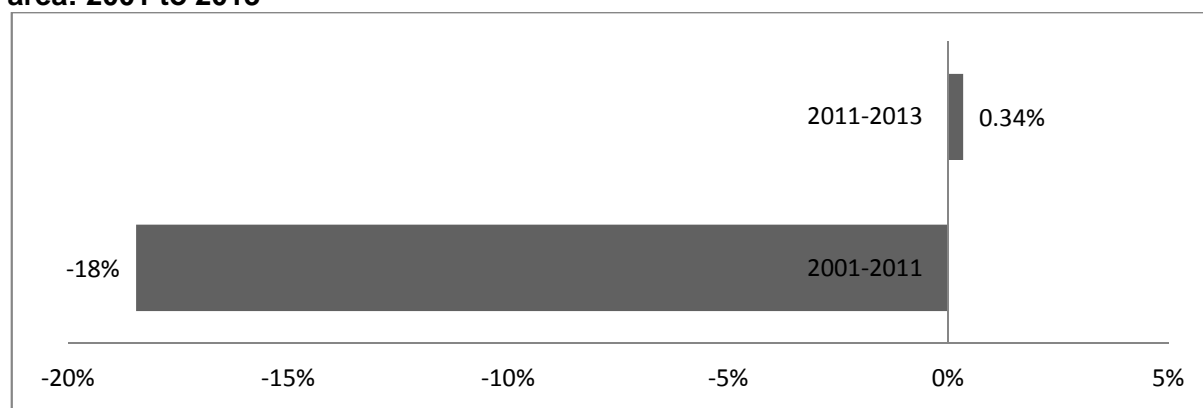
Figure 8: Comparison of number of households without hygienic toilets.



Findings:

- The number of households with no hygienic toilets had decreased in 2011 as compared to 2001. However in 2013, the number has generally increased for all areas compared.
- In the Sedibeng District area have decreased marginally by 0.43% from 2011 to 2013.
- The Emfuleni municipal area has seen a decrease in the number of household without hygienic toilets from 2001 to 2011. However the number increased slightly over the period between 2011 and 2013, as shown in Figure 9. The percentage of households with sewer has increased from 84.8% to 88.2% from 2001 to 2011 for the Emfuleni area and from 69.0% to 74.0% in the Metsimaholo area.

Figure 9: % Changes of households without hygienic toilets in the Emfuleni municipal area: 2001 to 2013



Findings:

- The results in Figure 9 show that a considerable number of households are still at risk of waterborne and poor sanitation diseases like diarrhoea and dysentery.

Table 16: Number of households below RDP level water services

Area	2001	2011	2013
Gauteng	138 941	223 801	232 599
Sedibeng DM	8 410	11 252	10 537
Metsimaholo LM	1 647	1 651	1 817
Emfuleni LM	4 729	6 608	5 602

Figure 10: Number of households below RDP level water services

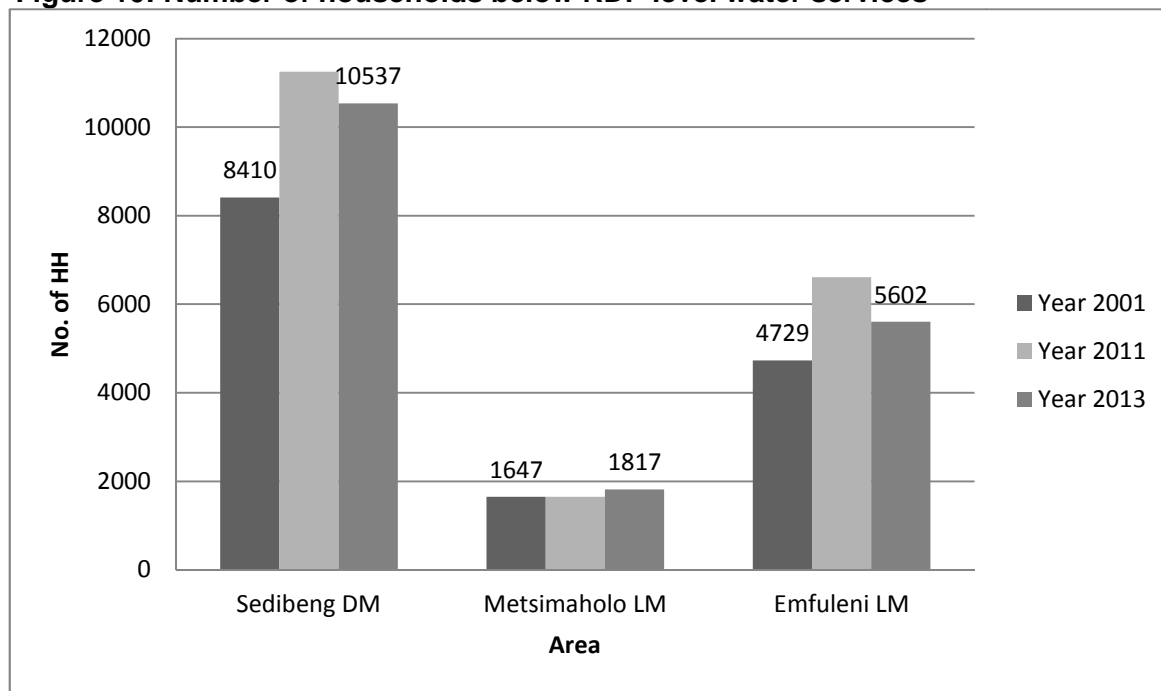
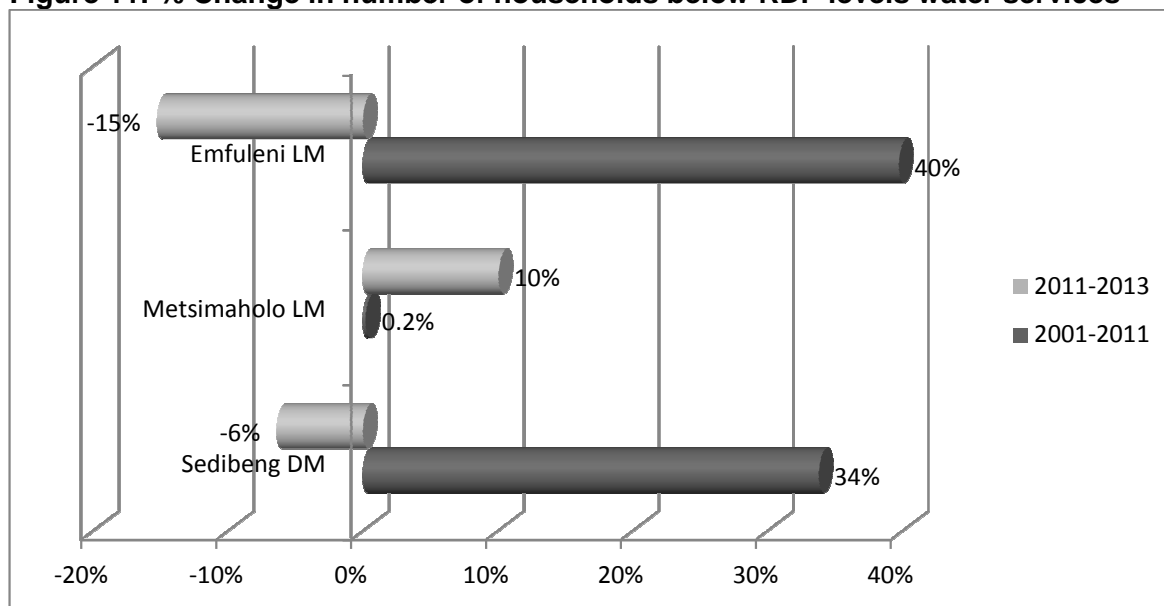


Figure 11: % Change in number of households below RDP levels water services



Findings:

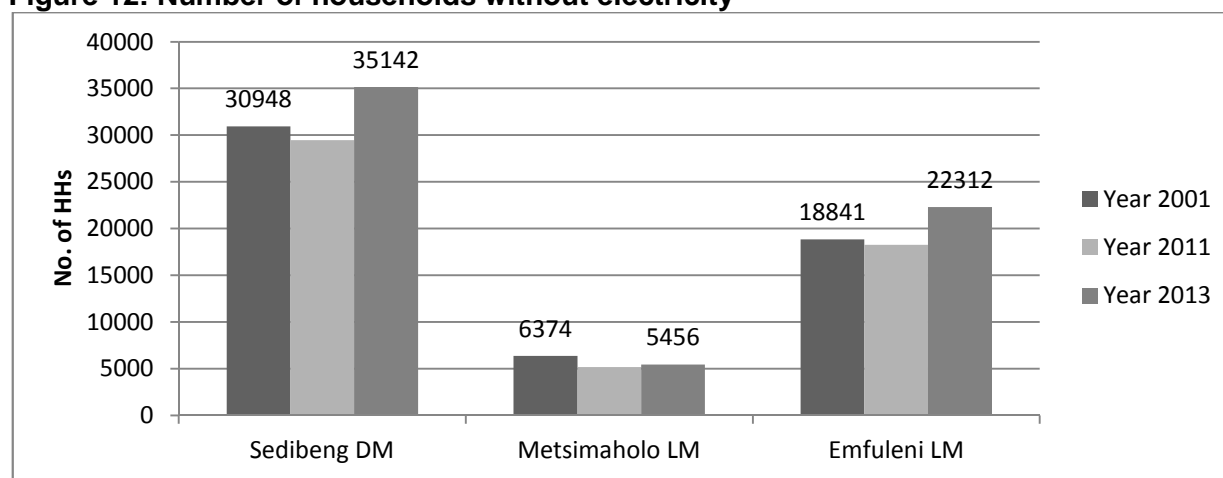
- There is still a general increase of number of households with water infrastructure below the RDP level. However, there are still partial differences between the areas in comparison.

- In the Metsimaholo municipal area, the number of households has increased by 10% from 2011 to 2013. In the Sedibeng district area a 34% was experienced from 2001 to 2011 and a 6% decrease from 2011 to 2013. In the Emfuleni municipal area, there was 40% increase from 2001 to 2011 and a 15% decrease from 2011 to 2013.

Table 17: Households with no electrical connection

Area	2001	2011	2013
Gauteng	510 158	540 631	602 169
Sedibeng DM	30 948	29 464	35 142
Metsimaholo LM	6 374	5 186	5 456
Emfuleni LM	18 841	18 270	22 312

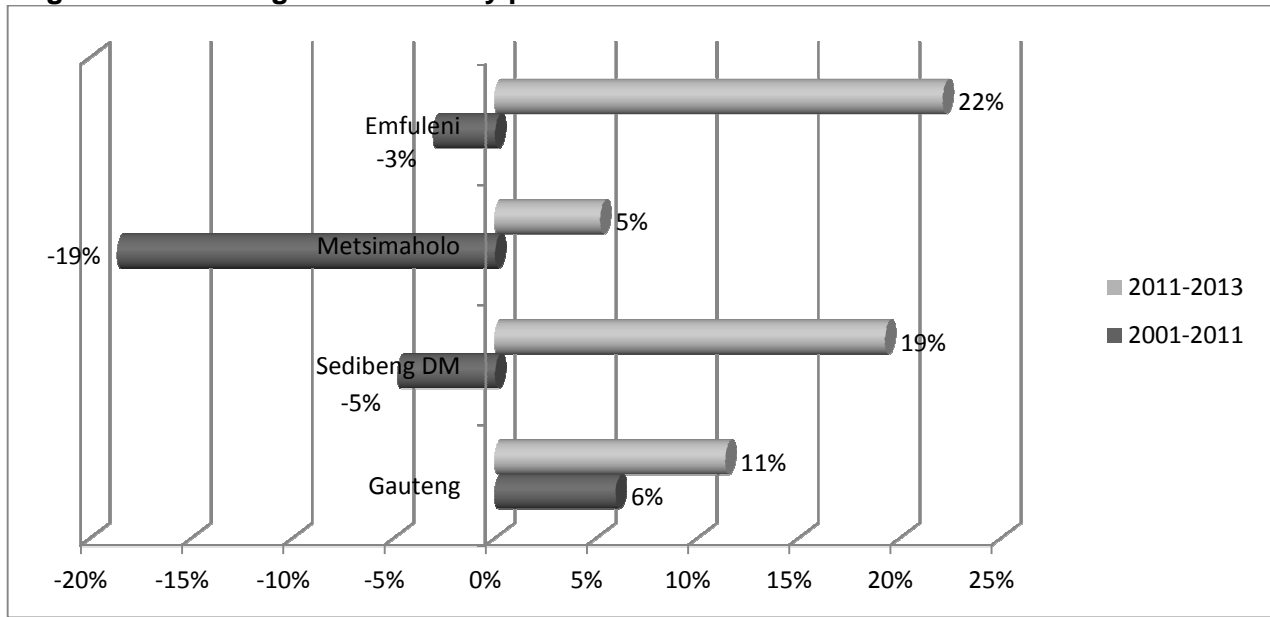
Figure 12: Number of households without electricity



Findings:

- The number of households with no electricity connection have been increasing from 2001 to 2013 in all areas under comparison. However, between 2001 and 2011, there were some improvements as observed by the reduction in the numbers in respective areas:
- The percentage of households with electrical connection have increased from 89.8% to 92.2% for the Emfuleni area from 2001 to 2011 and from 77.7% to 86.4% in the Metsimaholo area.

Figure 13: % changes in electricity provision from 2001 to 2013



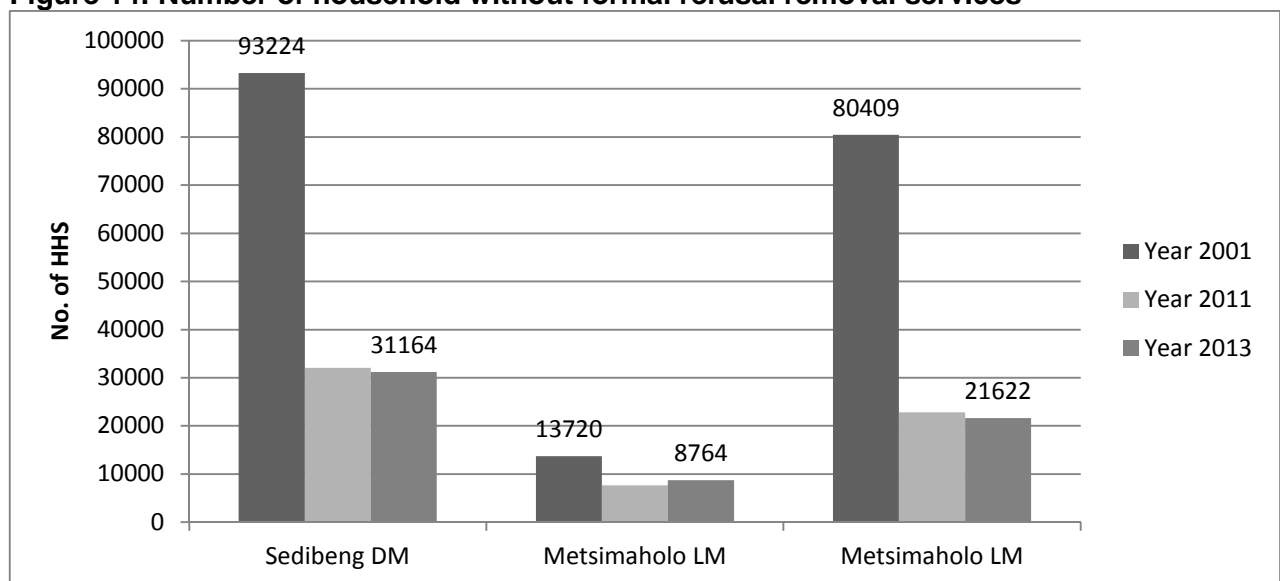
Findings:

- Figure 13 indicates a 5% reduction in the Sedibeng district area, a 19% reduction in the Metsimaholo municipal area and 3% reduction in the Emfuleni municipal area between 2001 and 2011.
- The Emfuleni municipal area registered an increase in the number of households with no electricity by 22% between 2011 and 2013.

Table 18: Number of households with no formal refuse removal

Area	2001	2011	2013
Gauteng	392 463	408 173	401 357
Sedibeng DM	93 224	32 048	31 164
Metsimaholo LM	13 720	7 656	8 764
Emfuleni LM	80 409	22 796	21 622

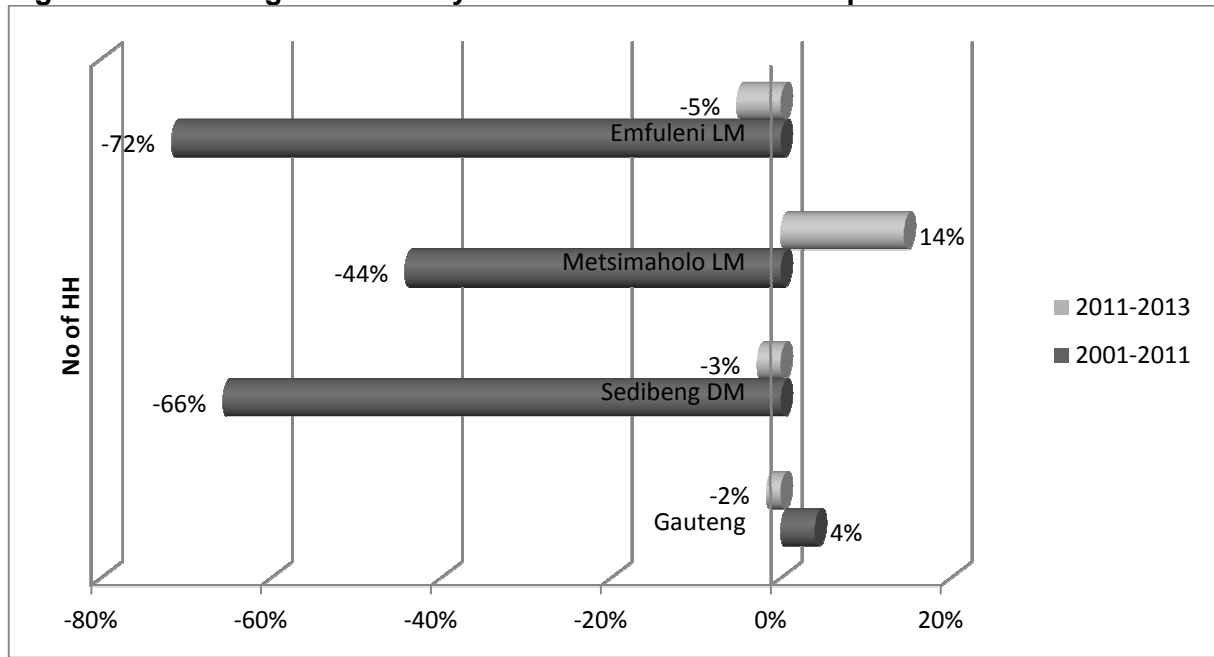
Figure 14: Number of household without formal refusal removal services



Findings:

- The number of households with no formal refuse removal had generally increased from 2001 to 2011 in the Gauteng province followed by a decrease between 2011 and 2013.
- In the Sedibeng, Metsimaholo and Emfuleni municipal areas, there have been a general decrease in the number of households without waste removal services between 2001 and 2013.
- The percentage of households with refuse removal have increased from 46.9% to 89.8% for the Emfuleni area from 2001 to 2011 and from 61.1% to 78.9% in the Metsimaholo area.

Figure 15: % Changes in delivery of refusal removal service provision from 2011 to 2013

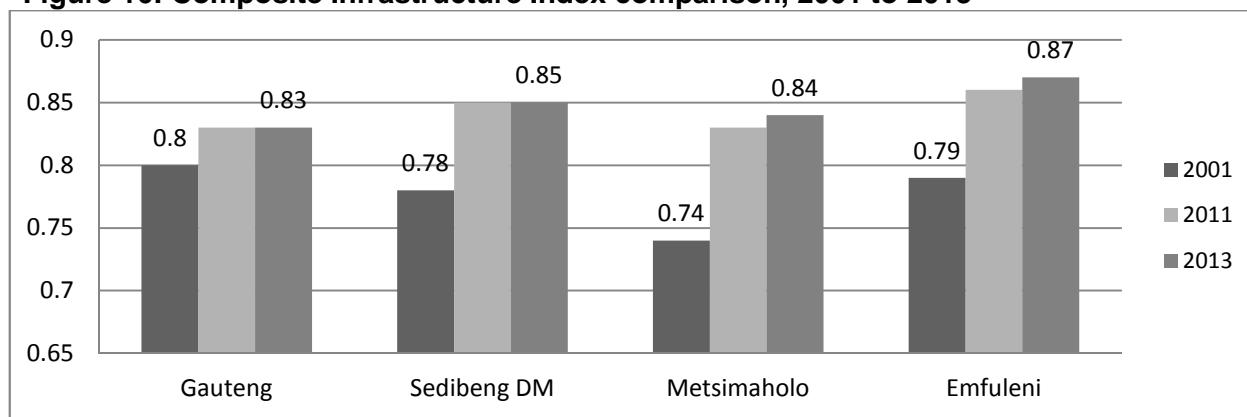


- There has been a general decrease in households without formal refuse removal services in the Emfuleni municipal area from 2011 to 2013.

Table 19: General household infrastructure index 2011-2013

Area	2001	2011	2013
Gauteng	0.80	0.83	0.83
Sedibeng DM	0.78	0.85	0.85
Metsimaholo LM	0.74	0.83	0.84
Emfuleni LM	0.79	0.86	0.87

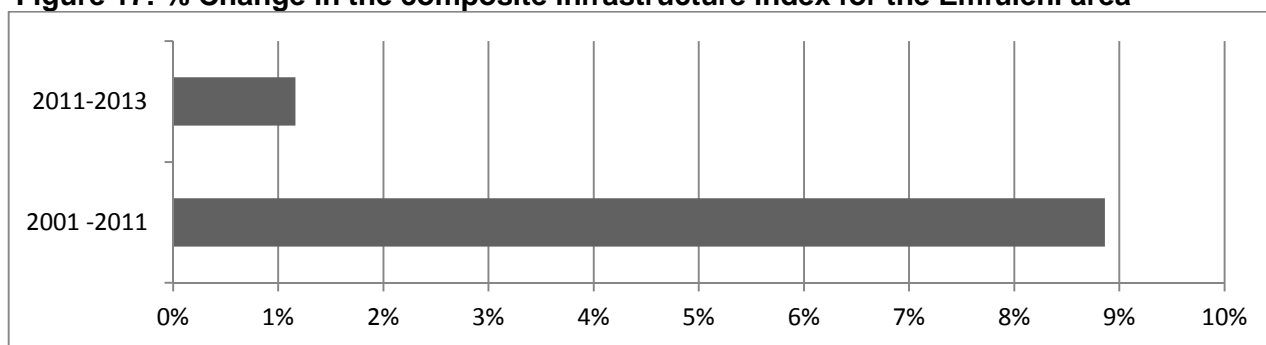
Figure 16: Composite Infrastructure Index comparison, 2001 to 2013



Findings:

- The index has a maximum value of 1 for complete infrastructure delivery and a value of 0 for lack of infrastructure delivery.
- There has been a general improvement in the household infrastructure index between 2001 and 2013 for all areas under comparison.
- The number of households with proper infrastructure has been steadily increasing in the Metsimaholo municipal area and the Emfuleni municipal area over the years under review.
- In the Emfuleni municipal area there has been a 9% improvement in the infrastructure provision index between 2001 and 2011 and a 1% improvement between 2011 and 2013.

Figure 17: % Change in the composite infrastructure index for the Emfuleni area



6. SAFETY AND SECURITY

In this section the crime rate and crime index within Gauteng, Sedibeng District Municipality, Metsimaholo Local Municipality and Emfuleni Municipality will be analysed. The analysis will be done for the years 2001 and 2011.

Table 20: Crime reported by detailed category

Year	2001				2011			
	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Murder	5 074	383	33	291	3 026	228	41	179
Sexual crimes	15 570	1 544	165	1 265	12 601	902	212	667
Attempted murder	7 625	710	46	567	3 603	191	46	140

Robbery with aggravating circumstances	54 100	3 253	204	2 585	35 758	1 675	256	1199
Common robbery	31 101	2 077	261	1 738	16 122	835	107	621
Burglary at residential area	88 176	7 285	1 080	5 402	64 526	4 455	708	3188
Burglary at business	20 084	1 816	304	1 305	16 022	1 324	190	957
Theft of motor vehicles	51 897	2 938	355	2 293	28 781	1 456	192	1052
Aggravated Robbery at residential premises	9 385	457	18	355	5 190	187	20	117
Aggravated Robbery at business premises	2 809	230	17	117	442	78	4	34
Aggravated Robbery-carjacking	88	12	1	9	0	0	0	0

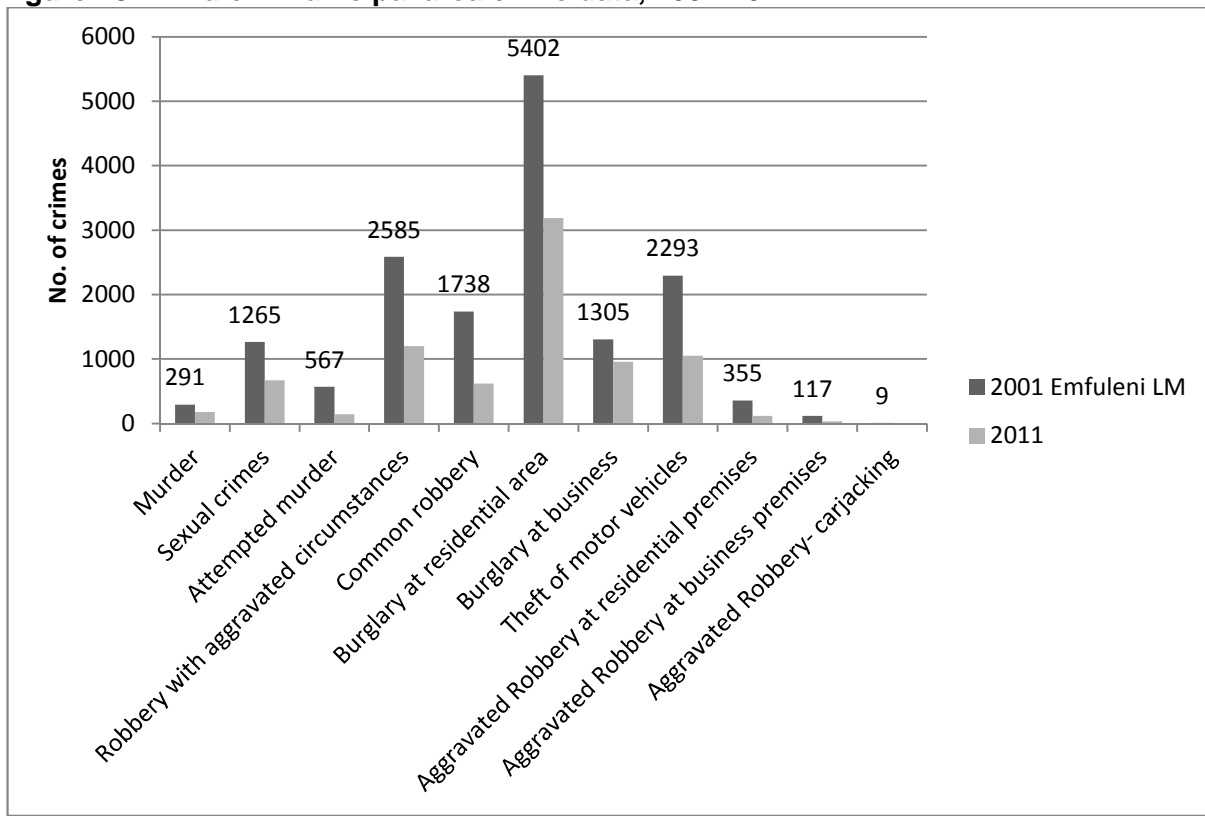
Table 21: % Change in crime reported between 2001 and 2011

	Gauteng (%)	Sedibeng DM (%)	Metsimaholo LM (%)	Emfuleni LM (%)
Murder	-40	-40	24	-38
Sexual crimes	-19	-42	28	-47
Attempted murder	-53	-73	0	-75
Robbery with aggravated	-34	-49	25	-54
Common robbery	-48	-60	-59	-64
Burglary at residential area	-27	-39	-34	-41
Burglary at business	-20	-27	-38	-27
Theft of motor vehicles	-45	-50	-46	-54
Aggravated Robbery at residential premises	-45	-59	11	-67
Aggravated Robbery at business premises	-84	-66	-76	-71

Findings:

- There has been a general decrease in all areas of comparison regarding crime rates.
- The Emfuleni municipal area has experienced in general the largest percentage declines in most types of crime from 2001 to 2011.
- Although crime rates are still very high, the decrease in the rates are encouraging. High crime rates, especially regarding serious crimes has a negative impact on the general business environment.

Figure 18: Emfuleni Municipal area crime data, 2001-2011



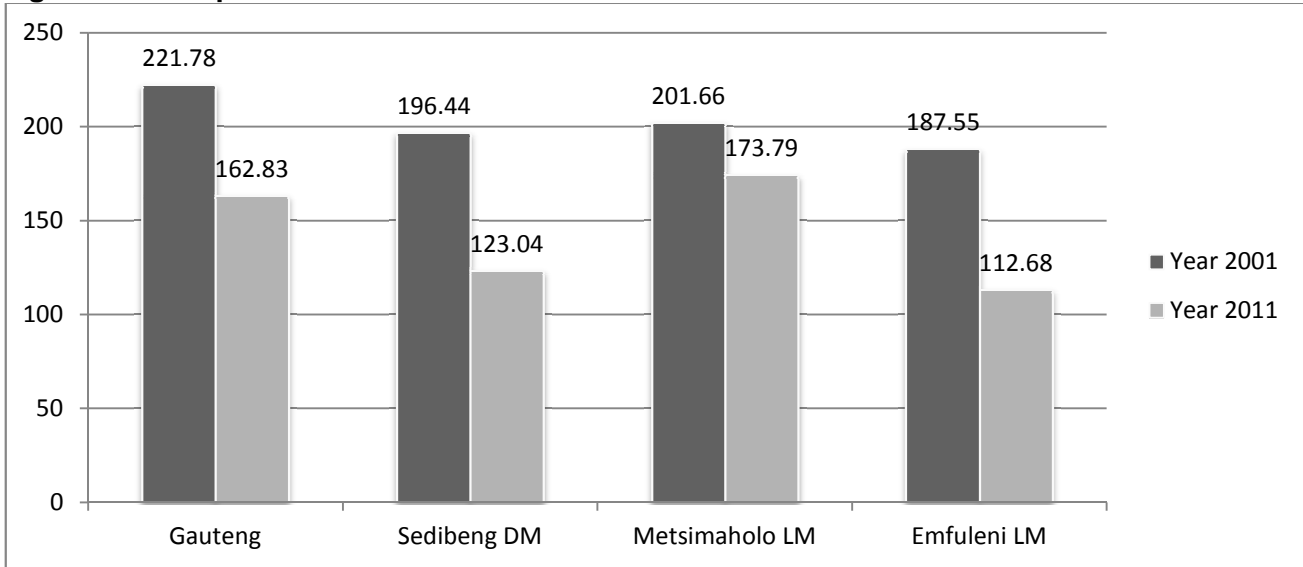
Findings:

- The Emfuleni municipal area has shown a decrease in all crime categories from 2001 to 2011 and it is hoped that this trend has continued to the today in the Emfuleni municipal area.

Table 22: Composite crime index

Area	2001	2011
Gauteng	221.78	162.83
Sedibeng DM	196.44	123.04
Metsimaholo LM	201.66	173.79
Emfuleni LM	187.55	112.68

Figure 19: Composite Crime Index



Findings:

- The crime index confirms a general improvement from 2001 to 2011 for all areas in comparison.
- The Emfuleni municipal area has shown a drastic improvement in the crime index from 2001 to 2011 with a crime index of 112 in 2011 if compared to the crime index of 173 of the Metsimaholo municipal area.

7. GROSS DOMESTIC PRODUCT (GDP)

This section provides an analysis of the GDP, labour remuneration for selected sectors, tress index and location quotient for the various areas.

Table 23: Gross Domestic Product (GDP) by Region (current prices)(R1000)

Area	2000	2005	2010	2013
Gauteng	319 702 831	550 441 580	924 938 540	1 209 042 434
Sedibeng DM	11 869 384	20 548 758	35 111 230	42 702 940
Metsimaholo LM	8 458 922	16 193 473	30 917 443	38 584 669
Emfuleni LM	9 637 937	16 566 242	27 343 048	32 705 414

Findings:

- The nominal increase in GDP for the Gauteng province was 4715 between 1996 and 2013.
- The nominal increase in GDP for the Sedibeng district area was 2925 between 1996 and 2013.
- The nominal increase in GDP for the Metsimaholo municipal area was 586% between 1996 and 2013.
- The nominal increase in GDP for the Emfuleni municipal area was 2615 between 1996 and 2013.
- The Emfuleni area contributed 3.01% and 81.2% of the Gauteng and Sedibeng area in 2001 and 2.7% and 76.6% in 2013.

Table 24: Gross Domestic Product by Region as % annual real growth

Area	2000	2005	2010	2013
Gauteng	5.7	5.4	3.4	2.2
Sedibeng DM	-0.1	4.6	5.1	-0.3
Metsimaholo LM	8.7	10.3	6.8	2.2
Emfuleni LM	-0.5	4.2	4.8	-0.5

Findings:

- The real growth rate declined from early 2000's to present. SA and Gauteng experienced sustainable growth until the international financial crisis of 2007/2008. Since then regardless of stimulus policies of government, the real growth rate performs poorly. Various factors contribute to this poor performance, for example lack of coordination of policies, labour strikes and unrest which caused a decline in productivity as well as an increase in production cost, increase in inflation, increase in imports relative to exports which caused an increase in the current account deficit which caused a depreciating currency as well as exchange rate volatility.
- The Sedibeng district area absorbed the decline in national growth poorly with a % annual growth of -0.3 in 2013.
- The Metsimaholo municipal area absorbed the decline in national growth the best of the region with continued relatively high growth rates in 2010 to 2013 (reflected in highest current price growth percentage according to table 24).
- The Emfuleni municipal area absorbed the decline in national growth also poorly with declining growth rates and a growth rate of -0.5% in 2013.

Table 25: Gross Domestic Product by Region (% annual real growth)

Area	1996-2001	2001-2006	2006-2011	1996-2013
Gauteng	2.9	4.9	3.2	3.5
Sedibeng DM	-2.9	5.0	3.3	1.5
Metsimaholo LM	3.1	8.1	4.5	4.9
Emfuleni LM	-3.3	4.8	2.7	1.2

Findings:

- Gauteng and SA experienced a lower real growth since the international financial crisis of 2007/2008, which is reflected in the lower growth as indicated in 2006-2011 period relative to the previous period.
- The Sedibeng district area experienced a lower real growth since the international financial crisis of 2007/2008, which is reflected in the lower growth as indicated in 2006-2011 period relative to the previous period. The growth performance for the period 1996-2013 is relatively low if compared to the province.
- The Metsimaholo municipal area experienced a lower real growth since the international financial crisis of 2007/2008, which is reflected in the lower growth as indicated in 2006-2011 period relative to the previous period. The growth performance for the period 1996-

2013 is the best in the region. Overall growth rates are however higher than the rest of the areas under comparison.

- The Emfuleni municipal area experienced a lower real growth since the international financial crisis of 2007/2008, which is reflected in the lower growth as indicated in 2006-2011 period relative to the previous period. The growth performance for the period 1996-2013 is lower as the provincial and district growth rates at only 1.2 percent growth rate.

Table 26: Gross Domestic Product by Region (GDP Rand per Capita)

Area	2000	2005	2010	2013
Gauteng	35 232	53 580	78 901	95 104
Sedibeng DM	15 290	25 015	39 216	45 310
Metsimaholo LM	70 683	124 115	210 020	245 398
Emfuleni LM	15 046	24 896	38 759	44 682

Findings:

- The increase in GDP per capita for Gauteng between 2000 and 2013 is 170%.
- The increase in GDP per capita for the Sedibeng district area between 2000 and 2013 is 196%.
- The increase in GDP per capita for the Metsimaholo municipal area between 2000 and 2013 is 247%. This is the highest growth for the region and the actual GDP per capita is also the highest for the region.
- The increase in GDP per capita for the Emfuleni municipal area between 2000 and 2013 is 197%.

Table 27: Coal-, Gold- and other Mining (primary sector) – Total Labour Remuneration (R 1000)

Area	2000	2010	2013
Gauteng	5 830 235	16 979 466	22 448 553
Sedibeng DM	9 327	43 700	62 970
Metsimaholo LM	52 633	582 038	1 168 874
Emfuleni LM	5 788	34 933	43 097

Findings:

- The increase in labour remuneration for Gauteng between 2000 and 2013 is 285%.
- The increase in labour remuneration for the Sedibeng district area between 2000 and 2013 is 575%. Although the increase in remuneration is substantial in percentage, the levels of remuneration is low in the region regarding mining if compared to Metsimaholo.
- The increase in labour remuneration for the Metsimaholo municipal area between 2000 and 2013 is 2121%. This is the best performer regarding mining in the region.
- The increase in labour remuneration for the Emfuleni municipal area between 2000 and 2013 is 644%. Although the increase in remuneration is substantial in percentage, the levels of remuneration are low if compared to the Metsimaholo area.

Table 28: Food and Textiles (secondary sector) – Labour Remuneration (R1000)

Area	2000	2010	2013
Gauteng	5 201 869	15 734 627	21 204 615
Sedibeng DM	140 426	467 141	603 866
Metsimaholo LM	19 146	78 580	96 119
Emfuleni LM	84 060	254 342	322 922

Findings:

- The increase in labour remuneration for Gauteng between 2000 and 2013 is 308%.
- The increase in labour remuneration for the Sedibeng district area between 2000 and 2013 is 330%.
- The increase in labour remuneration for the Metsimaholo municipal area between 2000 and 2013 is 402%.
- The increase in labour remuneration for the Emfuleni municipal area between 2000 and 2013 is 284%. The Emfuleni area had the lowest total remuneration of all areas compared.

Table 29: Education and Social Services (tertiary sector) – Total Labour Remuneration (R1000)

Area	2000	2010	2013
Gauteng	21 815 291	65 680 685	92 784 480
Sedibeng DM	928 267	2 679 487	3 804 851
Metsimaholo LM	193 747	561 416	707 205
Emfuleni LM	753 081	2 171 087	3 083 215

Findings:

- The increase in labour remuneration for Gauteng between 2000 and 2013 is 325%.
- The increase in labour remuneration for the Sedibeng district area between 2000 and 2013 is 310%.
- The increase in labour remuneration for the Metsimaholo municipal area between 2000 and 2013 is 265%.
- The increase in labour remuneration for the Emfuleni municipal area between 2000 and 2013 is 309%.

Table 30: Economic Tress Index

Area	2000	2005	2010	2013
Gauteng	49.38	50.09	48.75	50.23
Sedibeng DM	65.00	64.35	57.33	53.73
Metsimaholo LM	69.54	69.52	57.05	48.89
Emfuleni LM	68.54	67.98	61.21	57.57

Findings:

- The Tress index indicates the levels of specialization (score close to 1) or levels of diversification (score close to 0). The aim of economic development is to diversify the local economy and not to have one firm or sector dominating the local economy.
- The Tress index is fairly stable in Gauteng around 50, indication that no diversification has occurred since 2000.
- The Tress index continuous to decline in the Sedibeng district area which means that diversification has taken place since 2000. The decline in the Tress index between 2000 and 2013 is 17%.
- The Tress index continuous to decline in the Metsimaholo municipal area which means that diversification has taken place. The decline in the Tress index between 2000 and 2013 is 30%, which is the fastest in the region. Sasol is still dominating the local economy but to a lesser extent if compared to 2000.
- The Tress index continuous to decline in the Emfuleni municipal area which means that the local economy has slowly diversified and the manufacturing and especially the steel industry has declined while other sectors have grown. The decline in the Tress index between 2000 and 2013 is 16%, similar to that of Sedibeng district area, but slower than the Metsimaholo area.

Table 31: Economic Location Quotient by Sector

		Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2000	Manufacturing	1.18	2.25	2.92	2.48
	Electricity	0.98	1.36	5.17	1.16
	Construction	1.14	0.93	0.53*	0.81*
	Finance	1.15	0.75*	0.58*	0.75*
	Community Service	1.04	1.01	0.33*	0.94
2010	Manufacturing	1.18	2.32	3.06	2.58
	Electricity	0.98	1.70	4.43	1.49
	Construction	1.28	1.10	0.64*	0.93
	Finance	1.18	0.98	0.77*	1.00
	Community Service	1.03	0.97	0.26*	0.96
2013	Manufacturing	1.16	2.33	2.86	2.61
	Electricity	0.97	1.79	4.27	1.60
	Construction	1.26	1.11	0.71*	0.94
	Finance	1.21	0.98	0.85*	1.01
	Community Service	1.03	1.07	0.25*	1.07

Findings:

- The location quotient in Gauteng for all five sectors listed is very close to 1 or above 1, which means a high level of specialisation within these sectors.
- Sedibeng district area also experienced high level of specialisation in these various sectors with the exception of the finance sector during 2000.

- Metsimaholo municipal area had little or no specialisation advantage except within the manufacturing and electricity sectors during the three years of discussion. It should be noted that the specialisation quotient for these two sectors are the highest for this region compared to the other three areas of discussion.
- The Emfuleni area also experienced high level of specialisation in these various sectors with the exception of the construction and finance sectors during 2000.
- Other sectors such as agriculture, transport, mining and trade all had location quotients of less than 1 with the exception of Gauteng in trade sector during 2000 (1.04), 2010 (1.03) and trade and transport sector during 2013 (1.01 and 1.00).

8. LABOUR FORCE

This section provides an analysis of levels of employment and unemployment in the study region. Overall according to census 2011, the supply of employment or employment participation rate was 67.7% for Emfuleni and 61.7% for Metsimaholo in 2011. The employment demand or employment absorption rate was 40.4% for Emfuleni and 41.8% for Metsimaholo in 2011. The unemployment rate was estimated at 34.7% in 2011 from 47.3% in 2001 for Emfuleni and for Metsimaholo the figures are 32.1% in 2011 from 37.0% in 2001. The youth unemployment rate was estimated at 45.0% in 2011 from 57.9% in 2001 for Emfuleni and for Metsimaholo the figures are 41.6% in 2011 from 47.7% in 2001.

Table 32: Economically active population (EAP) by racial group: 2001, 2010 and 2013

Year	Racial group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	African	3 355 721	262 685	43 726	219 886
	White	947 438	62 091	12 421	44 047
	Coloured	146 667	3 718	231	2 811
	Asian	92 721	2 411	142	2 093
	Total	4 542 546	330 904	56 520	268 937
2011	African	4 618 400	313 194	55 686	253 326
	White	887 517	61 821	12 851	37 193
	Coloured	202 042	4 746	441	3 494
	Asian	159 420	3 352	249	2 523
	Total	5 867 379	383 113	69 227	296 536
2013	African	4 794 525	316 807	58 204	254 412
	White	883 823	56 434	12 030	32 836
	Coloured	203 037	4 928	487	3 580
	Asian	170 652	3 213	229	2 340
	Total	6 052 036	381 383	70 950	293 167

Findings:

- The Emfuleni municipal area and the Metsimaholo municipal area are comparable local municipal areas, and Emfuleni has much higher numbers of EAP in all the races, with the African population having the highest number. This could also reflect the population differences between the races. The Emfuleni municipal area has 4 times more EAP's if compared to the Metsimaholo municipal area.
- The totals show that the numbers have been increasing from 2001 to 2013. Gauteng has increased from 4542546 in 2001 to 6052036 in 2013 representing a 33.2% increase in 12 years.
- The increase in the Metsimaholo municipal area was 25.5% from 2001 to 2013 while for the Emfuleni municipal area the increase was only 9%.
- In the Emfuleni municipal area the total active population increased from 2001 to 2010, and then decreased from 2010 to 2013, this could be a result of the slow performance of the whole economy and including discouraged workers (hypothesis where people withdraw from the labor market).
- The Emfuleni municipal area is contributing 77% of the economically active population is Sedibeng.

Figure 20: The total economically active population for the three municipalities: 2001 to 2013

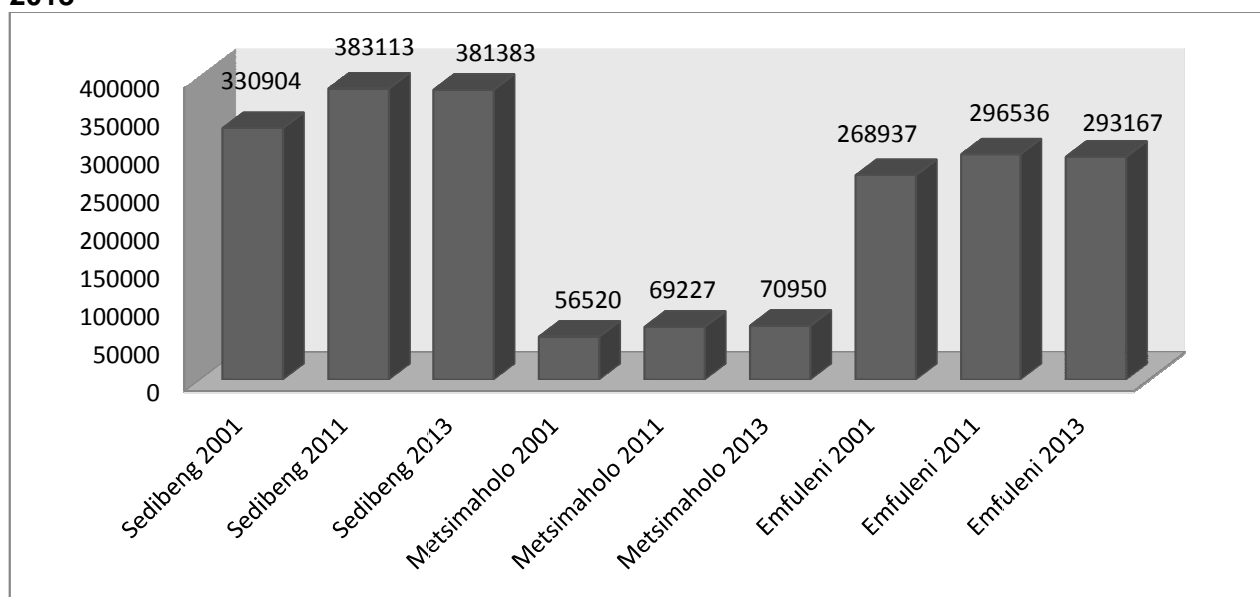
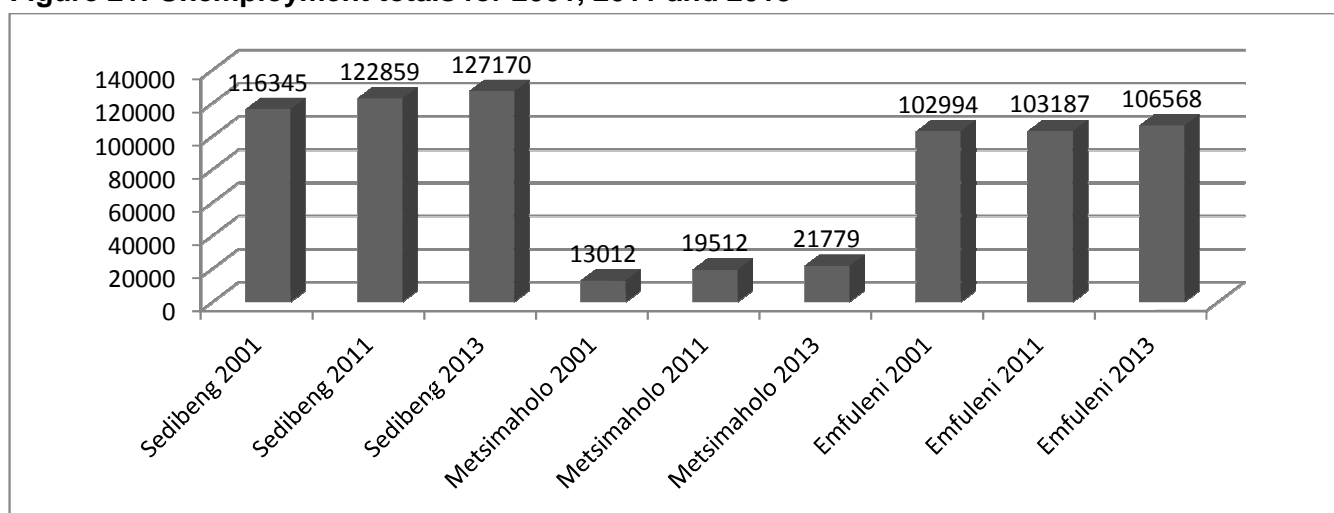


Table 33: Unemployment by racial groups: 2001, 2011 and 2013 as per official definition

Year	Racial Group	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2001	African	1 170 484 (34.9%)	107 122 (40.8%)	11 823 (27%)	96 146 (43.7%)
	White	75 043 (7.9%)	7 663 (12.3%)	1 138 (9.2%)	5 520 (12.5%)
	Coloured	50 067 (34.1%)	1 195 (32.2%)	40 (17.4%)	1 019 (35%)
	Asian	18 305 (19.7%)	364 (15.1%)	10 (7.3%)	309 (14.7%)
	Total	1 313 899 (28.9%)	116 345 (35.2%)	13 012 (23%)	102 994 (38.3%)
2011	African	1 404 653 (30.4%)	115 443 (36.9%)	18 437 (33.1%)	98 490 (38.9%)
	White	57 510 (6.5%)	5 571 (9.0%)	980 (7.6%)	3 294 (8.9%)
	Coloured	54 065 (26.8%)	1 407 (29.7%)	81 (18.4%)	1 074 (30.7%)
	Asian	22 809 (14.3%)	437 (13.0%)	14 (5.8%)	328 (13.0%)
	Total	1 539 037 (26.2%)	122 859 (32.1%)	19 512 (28.2%)	103 187 (34.8%)
2013	African	1 379 137 (28.8%)	118 846 (37.5%)	20 472 (35.2%)	101 332 (39.8%)
	White	58 840 (6.7%)	6 091 (10.8%)	1 178 (9.8%)	3 553 (10.8%)
	Coloured	52 947 (26.1%)	1 646 (33.4%)	108 (22.2%)	1 251 (34.9%)
	Asian	22 530 (13.2%)	588 (18.3%)	21 (9.1%)	432 (18.5%)
	Total	1 513 455 (25.0%)	127 170 (33.3%)	21 779 (30.7%)	106 568 (36.4%)

Figure 21: Unemployment totals for 2001, 2011 and 2013



Findings:

- There is a clear indication that the number of people unemployed is very high in all the areas with the black population having the highest unemployment rate.
- Unemployment rate has however down from the high figure of 38.3% in 2001 to 36.4% in 2013 for the Emfuleni municipal area while in the Metsimaholo municipal area the figures have increased from 23% in 2001 to 30.7 % in 2013.
- In the Emfuleni municipal area the unemployment levels have been decreasing since 2001. Unemployment for the black population has also declined between 2001 and 2013 from 43.7% to 39.8%.

Table 34: Employment by sector (Primary sector)

Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Agriculture and hunting	2000	26 967	1 515	3560	951
	2010	37 362	1 526	2 056	1 054
	2013	46 419	1 839	1 979	1 254
Forestry and logging	2000	2 659	127	535	96
	2010	528	19	8	14
	2013	877	29	3	21
Fishing operation of fish farms	2000	216	5	1	4
	2010	40	1	0	1
	2013	1	0	0	0
Mining of coal and lignite	2000	654	87	1130	68
	2010	3 490	869	759	680
	2013	2 520	559	530	438
Mining of Gold and uranium ore	2000	128 015	1 672	130	1 219
	2010	60 576	547	73	423
	2013	52 773	447	68	348
Mining of Metal ores	2000	4045	59	27	45
	2010	6 838	349	118	242
	2013	2 091	172	38	117
Other Mining and quarrying	2000	5 313	110	199	82
	2010	10 784	521	186	394
	2013	10 853	453	344	344

Findings (primary sector):

- Mining remains the main sector that contributes the highest numbers, being seconded by agriculture.
- There has been a massive reduction in the numbers in the gold mining sector from 128,015 in 2000 to 52.773 in 2013 a reduction of approximately 59% in Gauteng.
- The same picture of a reduction in gold contribution is true of the Emfuleni municipal area where it has gone down from 1 219 in 2000 to 348 in 2013, a reduction of 71%.
- The number of people employed in agriculture has been increasing both in Gauteng and in the Emfuleni municipal area. In the Metsimaholo municipal area there was a reduction from the 2010 figure to 2013.

Table 35: Employment by sector (secondary sector)

Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Food beverages and tobacco products	2000	61 568	3 724	627	2 578
	2010	76 737	5 295	727	2 035
	2013	79 303	5 402	1 142	1 904
Textiles, clothing and leather goods	2000	28 950	1 478	633	1 231
	2010	23 477	762	630	566
	2013	26 764	801	711	579
Wood and wood products	2000	64 373	2 764	390	2 178
	2010	62 981	1 922	150	1 125
	2013	57 018	1 643	108	914
Fuel, petroleum	2000	81 548	5 212	6 721	4 296

chemical and rubber products	2010	76 624	4 727	5 632	3 886
	2013	82 873	4 669	3 952	3 781
Other non-metallic mineral products	2000	25 895	2 544	276	2 153
	2010	32 896	3 688	412	2 686
	2013	32 692	3 573	213	2499
Metal products machinery and household appliances	2000	137 221	20 777	1 489	19 127
	2010	193 581	24 475	2 033	21 674
	2013	176 282	20 602	2 250	18 002
Electrical machines and apparatus	2000	45 358	3 104	231	2 649
	2010	20 161	1 564	58	1 301
	2013	22 699	1 646	96	1 345
Electronic Sounds/vision, medical & other appliances	2000	11 164	461	57	363
	2010	11 974	467	49	298
	2013	15 184	565	90	345
Transport Equipment	2000	32 800	1 002	59	750
	2010	45 870	1 224	114	819
	2013	46 261	1 080	226	697
Furniture and other items NEC and recycling	2000	31 124	1 460	303	1 152
	2010	33 902	1 212	792	824
	2013	35 858	1 181	262	772
Electricity, gas steam and hot water supply,	2000	14 813	1 194	463	930
	2010	21 267	2 268	503	2 108
	2013	22 276	2 398	452	2 229
Collection, purification and distribution of water	2000	3 260	657	84	563
	2010	9 591	2 240	131	1 383
	2013	6 273	1 470	245	863

Table 36: Employment by sector (Tertiary sector)

Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Construction	2000	111 247	6 014	1 804	4 790
	2010	185 550	8 578	2 425	6 377
	2013	178 630	7 732	2 484	5 615
Wholesale and commission trade	2000	101 058	5 823	1 608	4 775
	2010	150 054	8 877	1 763	7 231
	2013	167 505	9 258	1 816	7 433
Retail trade and repairs of goods	2000	276 098	14 519	2 504	12 076
	2010	289 420	16 435	2 763	13 763
	2013	323 663	17 294	2 699	14 314
Sale and Repairs of motor vehicles, sale and fuel	2000	77 507	4 262	884	3 503
	2010	125 506	7 414	1 419	5 868
	2013	135 275	7 549	1 577	5 858
Hotels and Restaurants	2000	52 700	2 019	413	1 653
	2010	115 349	4 322	926	3 418
	2013	107 999	3 813	1 033	2 961
Land and water transport	2000	60 800	3 595	891	2 925
	2010	99 240	5 375	1 142	4 142
	2013	117 009	5 925	1 230	4 485
Air Transport and transport supporting activities	2000	23 560	811	67	637
	2010	38 099	1 533	513	1 238
	2013	39 070	1 467	118	1 170
Post and telecommunication	2000	41 096	1 434	109	1 172
	2010	57 542	1 564	152	1 153
	2013	70 154	1781	147	1277
Finance and Insurance	2000	243 336	8 688	1 157	6 688
	2010	248 151	7 416	724	5 426

	2013	220 878	5 996	593	4 266
Real estate activities	2000	27 711	1 180	105	920
	2010	35 492	832	158	612
	2013	37 938	791	116	566
Other Business activities	2000	407 723	16 747	2 543	13 328
	2010	613 961	23 335	3 609	18 624
	2013	677 035	23 403	3 834	18 330
Public Administration and defense activities	2000	109 426	5 982	1 325	4 910
	2010	199 493	11 378	2 344	9 326
	2013	214 513	12 001	2 679	9 771
Education	2000	109 953	7 016	1 169	5 989
	2010	148 133	9 843	1 435	8 393
	2013	194 184	12 766	1 634	10 824
Health and Social Work	2000	179 023	8 976	1 416	7 620
	2010	230 230	12 045	1 441	10 333
	2013	267 343	13 760	1 648	11 744
Other Service activities	2000	122 437	5 994	1 418	4 946
	2010	167 862	8 353	2 727	7 161
	2013	174 040	8 574	3 110	7 312
Households	2000	241 104	18 624	4 218	13 953
	2010	363 302	19 790	4 460	13 945
	2013	356 496	18 537	4 488	12 839

Figure 22: Total employment for all sectors, a comparison between the Emfuleni municipal area and the Metsimaholo municipal area

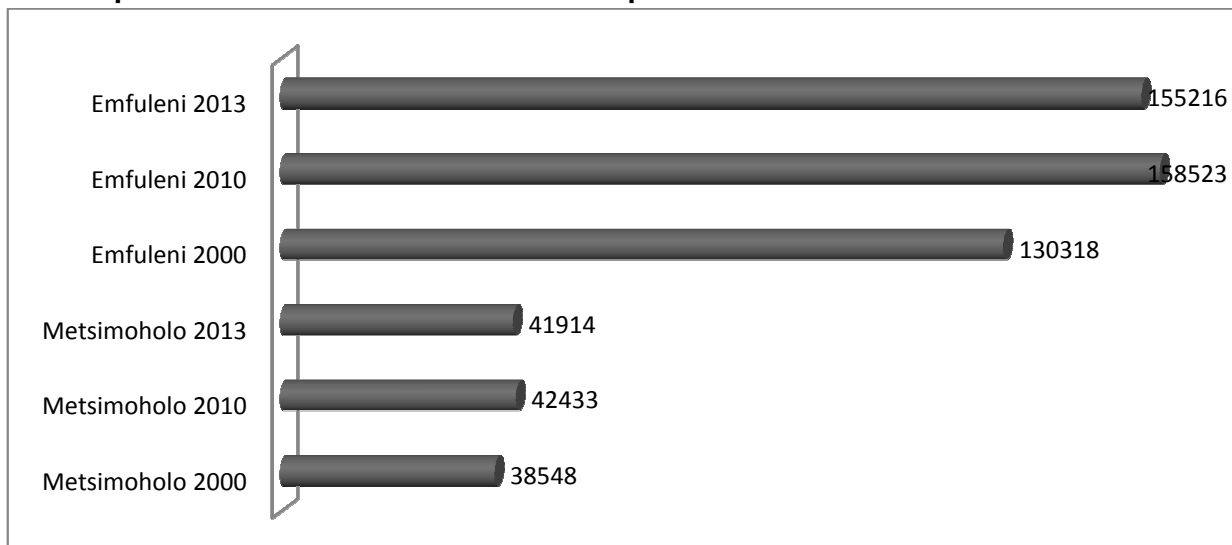
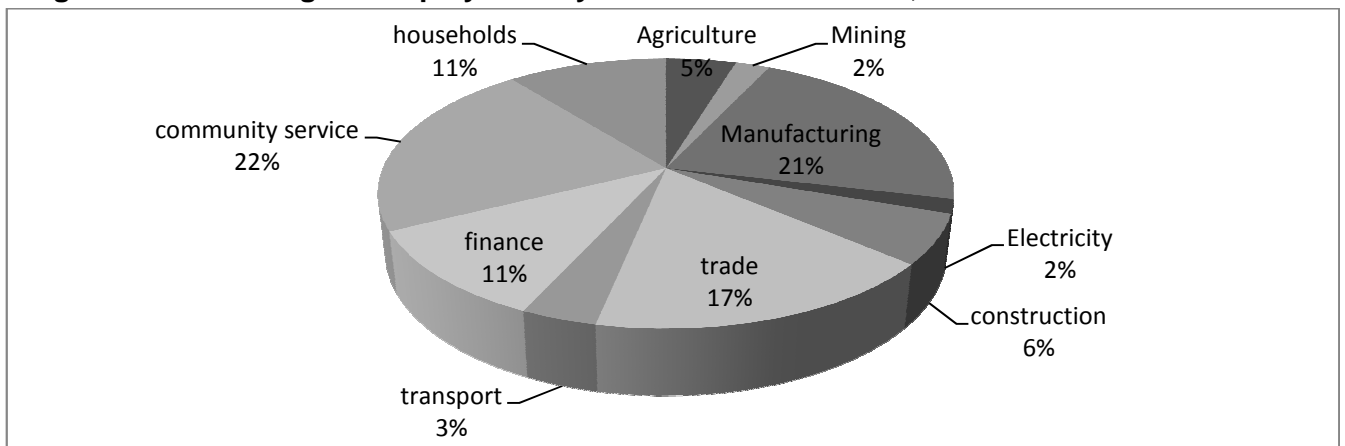


Table 37: Formal sector employment, sector share of regional total

Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Agriculture	2000	1.0%	1%	10.6%	0.8%
	2010	1.0%	0.8%	4.9%	0.7%
	2013	1.2%	0.9%	4.7%	0.8%
Mining	2000	4.8%	1.2%	3.9%	1.1%
	2010	2.2%	1.1%	2.7%	1.1%
	2013	1.7%	0.8%	2.3%	0.8%
Manufacturing	2000	18.0%	26.6%	28.0%	28.0%
	2010	15.3%	22.6%	25.6%	22.2%
	2013	14.4%	20.7%	21.6%	19.9%

Electricity	2000	0.6%	1.2%	1.4%	1.1%
	2010	0.8%	2.2%	1.5%	2.2%
	2013	0.7%	1.9%	1.7%	2.0%
Construction	2000	3.8%	3.8%	4.7%	3.7%
	2010	4.9%	4.3%	4.7%	4.0%
	2013	4.5%	3.9%	5.9%	3.6%
Trade	2000	17.6%	16.7%	14.0%	16.9%
	2010	17.9%	18.5%	16.2%	19.1%
	2013	18.4%	19.0%	17.0%	19.7%
Transport	2000	4.3%	3.7%	2.8%	3.6%
	2010	5.1%	4.2%	4.3%	4.1%
	2013	5.7%	4.6%	3.6%	4.5%
Finance	2000	23.5%	16.7%	9.9%	16.1%
	2010	23.6%	15.7%	10.6%	15.6%
	2013	23.4%	15.2%	10.8%	14.9%
Community Service	2000	18.0%	17.5%	13.8%	18.0%
	2010	19.6%	20.7%	18.7%	22.2%
	2013	21.2%	23.6%	21.6%	25.5%
Households	2000	8.3%	11.7%	10.9%	10.7%
	2010	9.6%	9.9%	10.5%	8.8%
	2013	8.9%	9.3%	10.7%	8.3%

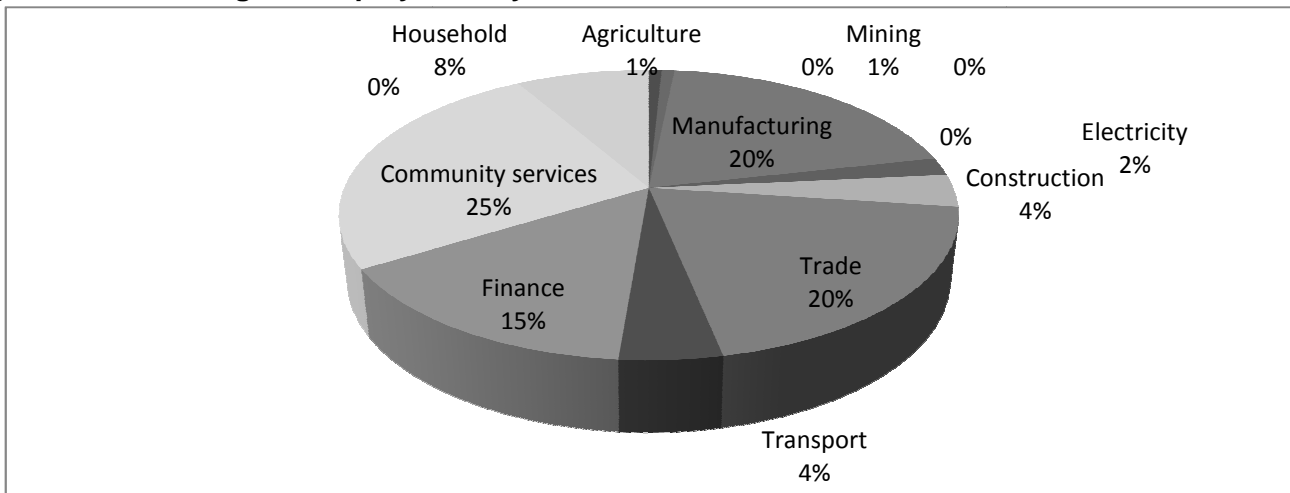
Figure 23: Percentage of employment by sector in Metsimaholo, 2013



Findings

- In the Metsimaholo municipal area, the largest share of employment comes from the manufacturing sector at 21%, followed by household and community services both at 19%. The Sasol plant in the area provides for large numbers of employment in the manufacturing sector.
- In the Emfuleni municipal area, the largest share of employment is in the community services at 25% followed by manufacturing and trade both at 20%.

Figure 24: Percentage of employment by sector in Emfuleni, 2013



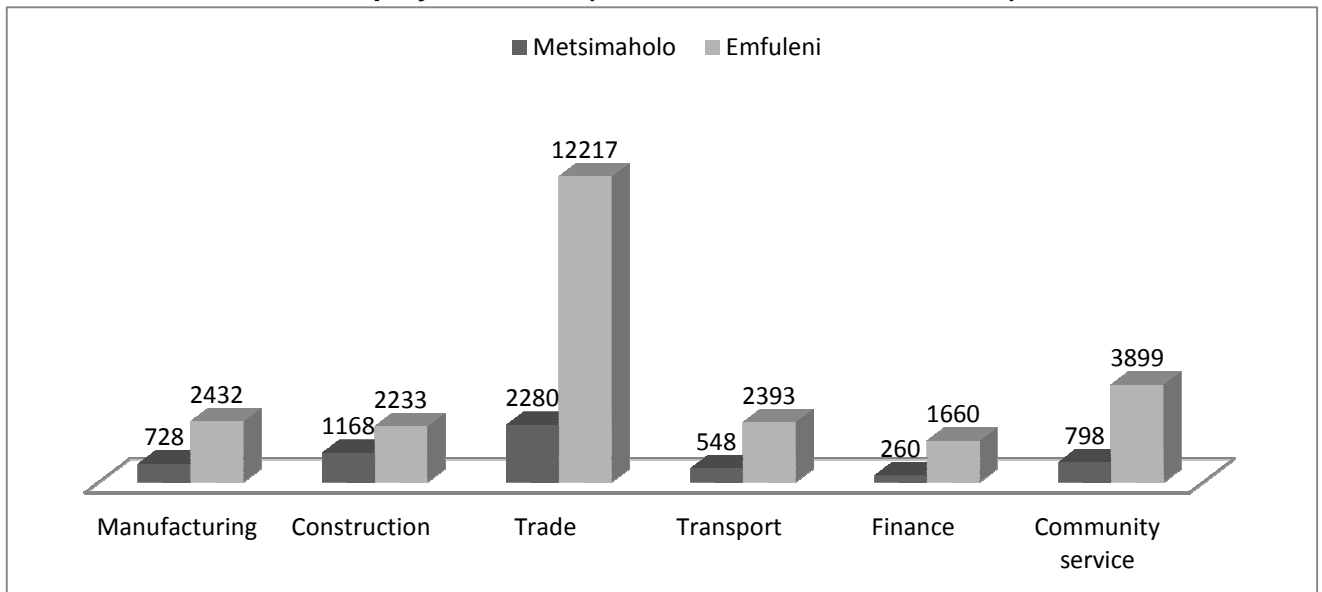
Findings:

- The share of mining is very small in both the Emfuleni and Metsimaholo municipal areas, at 1% in both areas. This verifies the fact that the mining sector cannot be relied on to produce the impetus for the national economy or the local economies as it used to in the past.
- Manufacturing which is the engine for industrialization is significant in both the Emfuleni and Metsimaholo municipal areas contributing 20% and 21 % respectively.

Table 38: Informal Sector employment

Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Manufacturing	2000	42 995	3 821	441	3 079
	2010	52 376	3 321	678	2 622
	2013	54 004	3 128	728	2 432
Construction	2000	46 089	3 090	435	2 363
	2010	66 411	2 836	1 075	2 142
	2013	76 589	3 004	1 168	2 233
Trade	2000	201 740	14 740	1 857	12 087
	2010	271 440	16 001	2 698	12 977
	2013	279 410	15 244	2 280	12 217
Transport	2000	35 004	2 594	251	2 116
	2010	57 896	3 294	554	309
	2013	56 129	2 931	548	2 393
Finance	2000	28 060	1 930	159	1 527
	2010	35 858	1 730	309	1 343
	2013	50 266	2 180	260	1 660
Community Services	2000	46 415	3 425	428	2 796
	2010	74 074	3 948	966	3 237
	2013	92 228	4 780	798	3 899

Figure 25: Informal Sector employment 2013 (Emfuleni versus Metsimaholo)



Findings:

- The informal sector contribution is significant for all the areas, with the trade sector having the highest percentages.
- The informal manufacturing sector has increased over the years in the Metsimaholo municipal area, while it has slightly declined in the Emfuleni municipal area, this may mean that there an increase in the informal manufacturing sector in the Metsimaholo municipal area, and it may also reflect the fact that the manufacturing sector in the Emfuleni municipal area is more formalized.
- The finance sector is also importantly contributing to the economy. The contribution of this sector is higher in the Emfuleni municipal area than it is in the Metsimaholo municipal area.

Table 39: Employment, Total of Formal and Informal Sectors

Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Agriculture	2000	29 841	1 647	4 096	1 050
	2010	37 930	1 546	2 064	1 069
	2013	47 297	1 868	1 982	1 275
Mining	2000	138 018	1 927	1 486	1 414
	2010	81 688	2 285	1 137	1 738
	2013	68 236	1 631	980	1 247
Manufacturing	2000	563 013	46 349	11 226	39 557
	2010	633 846	48 656	11 276	37 836
	2013	628 938	44 290	9 778	33 269
Electricity	2000	18 073	1 851	548	1 493
	2010	30 858	4 508	634	3 491
	2013	28 545	3 867	697	3 092
Construction	2000	157 336	9 104	2 239	7 153
	2010	251 962	11 415	3 500	8 519
	2013	255 219	10 735	3 652	7 848
Trade	2000	708 854	41 364	7 266	34 095

	2010	951 769	53 049	9 568	43 256
	2013	1 013 852	53 158	9 404	42 782
Transport	2000	160 461	8 434	1 318	6 851
	2010	252 778	11 766	2 360	9 251
	2013	282 362	12 104	2 043	9 324
Finance	2000	760 830	28 545	3 965	22 462
	2010	933 462	33 314	4 800	26 006
	2013	986 117	32 370	4 804	24 821
Community Service	2000	567 253	31 363	5 757	26 260
	2010	819 792	45 568	8 913	38 450
	2013	942 307	51 881	9 869	43 551
Households	2000	241 104	18 624	4 218	13 953
	2010	363 302	19 790	4 460	13 945
	2013	356 496	18 537	4 488	12 839
Totals	2000	3 290 784	189 624	42 118	154 287
	2010	4 357 386	231 895	48 713	183 561
	2013	4 609 370	230 443	47 697	180 050

Findings:

- It is clear from the figures that the Emfuleni local economy is much larger than that of the Metsimaholo local economy.
- The total employment figures for all the sectors, for both formal and informal sectors indicate that the Emfuleni municipal area has 3.77 time more employment opportunities if compared to the Metsimaholo area.
- Manufacturing, trade, finance and community services are the main sectors with very high potential for creating employment for the Emfuleni municipal area.
- The mining sector is dwindling as it is in the rest of the parts of South Africa and there is need to invest more in the manufacturing sector for both local consumption and export.

Figure 26: Total Employment figures for the Emfuleni municipal area per sector

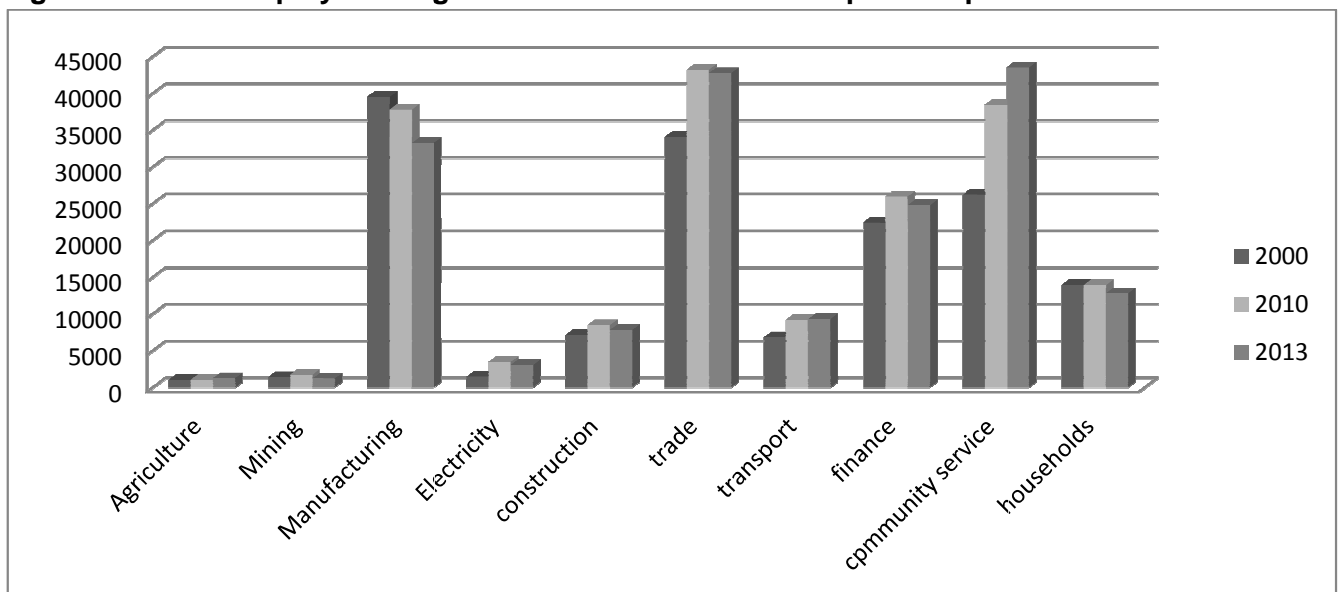
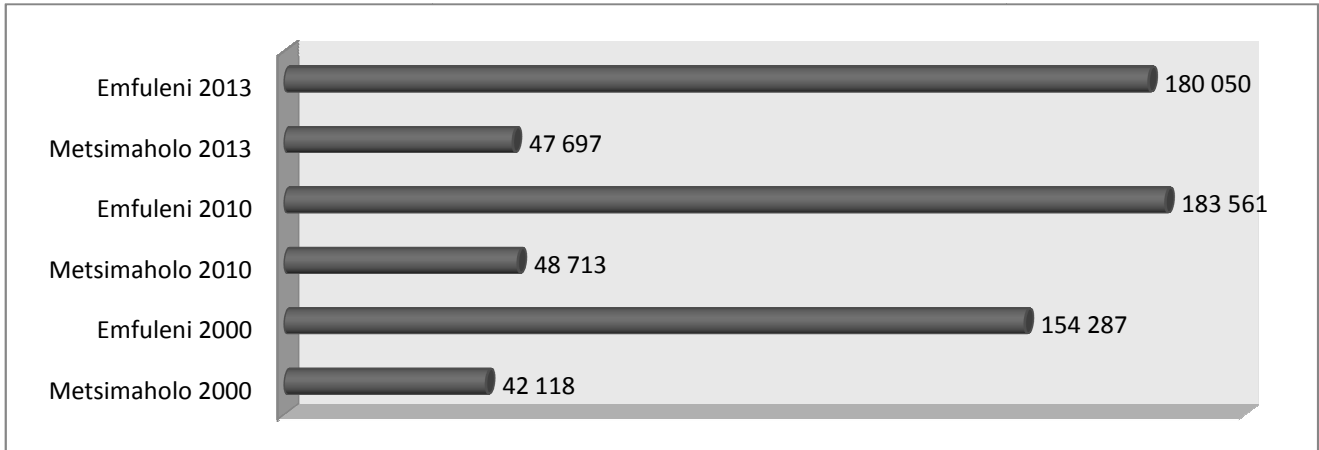


Figure 27: Total employment: The Emfuleni municipal area compared to the Metsimaholo municipal area.



9. GROSS VALUE ADDED (GVA)

In this section the Gross Value Added activities in the study region are analysed per sector and sub-sector.

Table 40: Gross Value Added (GVA) by region and sector (Primary Sector) (R1000)

Gross Value Added in Rand values					
Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Agriculture and hunting	2000	1 401 223	149 714	68 556	89 712
	2010	3 098 762	331 254	154 047	198 494
	2013	3 476 855	371 645	184 329	222 697
Forestry and logging	2000	198 995	3 966	0	2 948
	2010	498 372	9 890	1	7 353
	2013	728 528	14 466	1	10 755
Fishing operation of fish farms	2000	25 225	714	0	492
	2010	106 005	2 997	2	2 066
	2013	121 540	3 438	2	2 369
Mining of coal and lignite	2000	281 888	6 423	73 612	4 291
	2010	2 047 480	50 142	1 373 066	33 494
	2013	3 162 785	72 119	2 821 653	48 174
Mining of Gold and uranium ore	2000	7 048 958	1 534	14 601	5
	2010	14 818 352	3 484	76 973	12
	2013	12 436 455	2 825	88 978	9
Mining of Metal ores	2000	1 094 100	13 401	677	11 699
	2010	5 527 234	71 414	8 180	62 243
	2013	8 037 475	95 765	15 566	83 601
Other Mining and quarrying	2000	1 050 879	4 339	11 547	2 619
	2010	7 620 272	31 407	196 552	503 275
	2013	10 171 814	38 398	334 686	23 182

Table 41: Gross Value Added (GVA) by region and sector (secondary Sector)(R1000)

Gross value added in Rand values					
Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Food beverages and tobacco products	2000	7 848 228	248 091	77 994	159 816
	2010	25 232 122	841 832	348 273	503 275
	2013	30 210 083	962 358	382 595	566 571
Textiles, clothing and leather goods	2000	1 213 487	26 593	13 607	18 237
	2010	1 731 502	40 881	29 940	25 823
	2013	1 431 843	32 605	23 353	20 251
Wood and wood products	2000	6 506 761	68 146	24 745	51 062
	2010	11 726 753	128 314	66 722	90 367
	2013	12 590 669	130 766	67 562	90 918
Fuel, petroleum chemical and rubber products	2000	13 611 839	193 775	3 655 616	149 002
	2010	26 081 410	387 571	10 205 631	280 170
	2013	23 215 383	327 565	9 133 699	233 779
Other non-metallic mineral products	2000	2 460 116	123 252	8 383	91 749
	2010	7 974 845	426 301	40 104	292 965
	2013	7 187 527	370 254	35 276	250 305
Metal products machinery and household appliances	2000	17 086 165	3 430 022	145 484	3 230 145
	2010	38 491 759	7 653 240	484 860	7 066 106
	2013	38 794 548	7 333 168	487 157	6 742 129
Electrical machines and apparatus	2000	2 353 848	104 790	37 179	86 884
	2010	3 667 838	170 272	86 140	133 142
	2013	3 973 647	174 861	89 719	135 072
Electronic Sounds/vision, medical & other appliances	2000	1 244 788	22 830	3 880	20 663
	2010	2 591 057	47 782	11 840	42 137
	2013	2 948 616	51 056	12 767	44 778
Transport Equipment	2000	5 995 094	72 563	23 522	48 787
	2010	11 154 349	140 518	63 147	87 865
	2013	11 043 072	132 228	59 490	81 455
Furniture and other items NEC and recycling	2000	6 925 643	173 403	15 363	130 540
	2010	12 555 334	332 091	41 853	232 315
	2013	13 438 396	339 689	41 288	234 063
Electricity, gas steam and hot water supply,	2000	6 417 900	175 406	1 003 003	118 625
	2010	15 734 948	479 131	2 950 229	302 249
	2013	23 548 259	679 898	3 984 662	423 742
Collection, purification and distribution of water	2000	1 347 649	210 807	12 285	149 317
	2010	5 624 639	876 262	52 635	620 667
	2013	8 398 136	1 308 197	71 559	926 611

Table 42: Gross Value Added (GVA) by region and sector (Tertiary Sector) in Rand values (R1000)

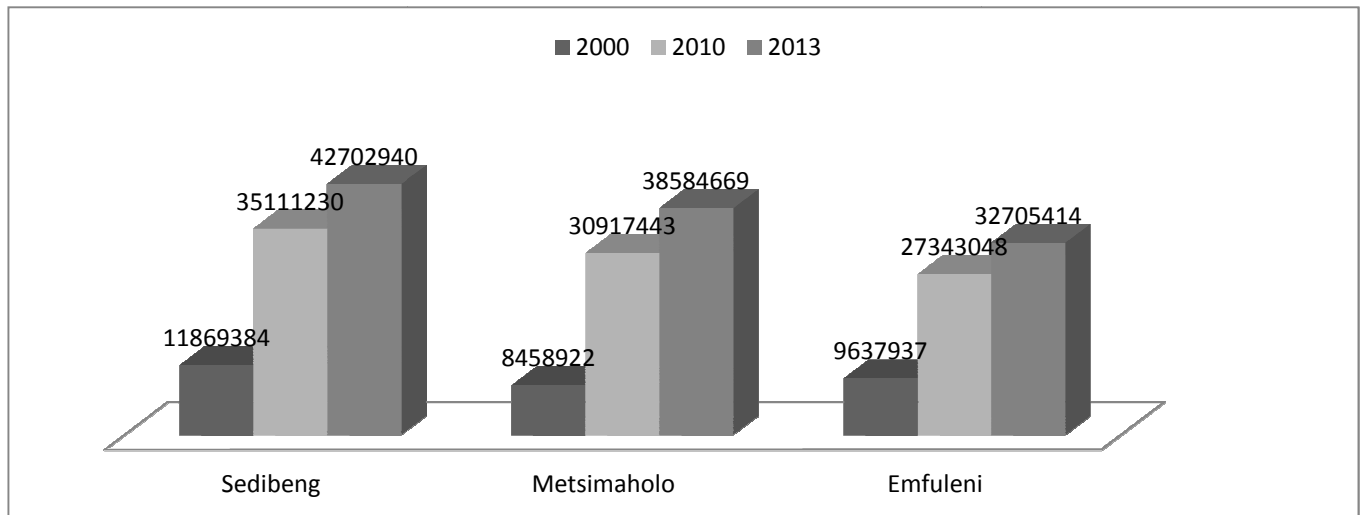
Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Construction	2000	8 306 227	245 101	95 707	173 352
	2010	40 777 412	1 280 070	628 852	836 211
	2013	50 988 176	1 526 417	836 484	981 010
Wholesale and commission trade	2000	17 029 602	306 456	120 694	218 804
	2010	52 416 494	1 012 033	590 461	666 660
	2013	76 609 826	1 410 814	882 003	914 119
Retail trade and repairs of goods	2000	18 016 274	397 128	146 864	269 365
	2010	46 424 384	1 094 052	1 017 516	681 043
	2013	62 819 410	1 414 232	1 571 231	865 039

Sale and Repairs of motor vehicles, sale and fuel	2000	6 242 344	137 829	66 036	101 168
	2010	21 454 046	501 445	356 525	341 467
	2013	30 723 079	682 502	527 359	457 639
Hotels and Restaurants	2000	2 815 989	46 574	28 219	36 276
	2010	8 162 165	145 231	132 188	106 396
	2013	10 625 225	180 631	178 783	130 659
Land and water transport	2000	8 426 756	262 978	206 849	176 900
	2010	33 217 203	1 114 852	1 175 135	689 659
	2013	44 797 915	1 445 839	1 622 755	879 204
Air Transport and transport supporting activities	2000	6 553 494	42 237	15 118	33 980
	2010	16 187 634	106 968	53 129	81 967
	2013	21 078 563	131 908	69 527	100 056
Post and telecommunication	2000	10 462 503	203 411	60 115	162 235
	2010	24 023 713	482 913	194 865	361 640
	2013	30 485 084	579 699	247 981	428 484
Finance and Insurance	2000	25 747 197	274 006	250 758	197 032
	2010	90 330 082	1 021 656	1 482 256	680 646
	2013	133 625 373	1 436 975	2 092 674	942 426
Real estate activities	2000	19 165 248	947 161	132 235	811 196
	2010	49 836 816	4 265 697	244 728	3 649 673
	2013	60 305 402	5 026 482	293 888	4 271 165
Other Business activities	2000	17 188 473	244 527	391 373	171 470
	2010	66 079 786	992 978	2 496 191	645 870
	2013	88 621 151	1 262 043	3 333 530	808 281
Public Administration and defense activities	2000	17 690 661	468 327	126 069	329 788
	2010	55 271 878	1 464 199	395 147	1 031 066
	2013	71 596 282	1 897 995	454 405	1 336 880
Education	2000	13 771 180	858 421	155 705	697 683
	2010	36 829 993	2 300 464	418 326	1 869 705
	2013	51 807 742	3 243 157	523 187	2 635 880
Health and Social Work	2000	11 856 222	390 899	72 629	311 401
	2010	42 043 735	1 388 620	258 660	1 106 212
	2013	57 989 368	1 918 865	317 088	1 528 619
Other Service activities	2000	23 087 744	601 135	164 685	425 595
	2010	58 329 195	1 520 351	417 565	1 076 386
	2013	75 001 946	1 957 168	476 867	1 385 646
Total Industries	2000	290 472 698	10 455 958	7 223 114	8 482 836
	2010	837 667 561	30 716 316	26 051 688	23 824 406
	2013	1 081 989 874	36 556 029	31 262 137	27 805 228

Table 43: GDP in rand values (R1000)

Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2000	319 702 831	11 869 384	8 458 922	9 637 937
2010	924 938 540	35 111 230	30 917 443	27 343 048
2013	1 209 042 434	42 702 940	38 584 669	32 705 414

Figure 28: GDP values for 2000, 2010 and 2013



Findings:

- The GDP of the Emfuleni municipal was much higher than that of the Metsimaholo municipal area in 2000, but the GDP of the Metsimaholo municipal area overtook the GDP of the Emfuleni municipal area in 2010 and was even higher in 2013.
- The population of the Emfuleni municipal area is however being much larger than that of the Metsimaholo municipal area, relating to a much higher GDP per capita in the Metsimaholo area.

Table 44: Primary sector: Gross Value Added (GVA), average annual growth by sector (constant 2005 prices)

Gross Value Added					
Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Agriculture and hunting	2000	1.6%	1.5%	23.2%	1.5%
	2010	0.2%	0.2%	1.1%	0.2%
	2013	1.8%	1.8%	3.2%	1.8%
Forestry and logging	2000	2.6%	3.4%	25.4%	3.4%
	2010	-6.7%	-6.6%	-5.8%	-6.6%
	2013	-0.9%	-0.9%	0.4%	-0.4%
Fishing operation of fish farms	2000	7.5%	7.8%	30.8%	7.8%
	2010	12.6%	12.6%	13.5%	12.6%
	2013	3.8%	3.8%	5.2%	3.8%
Mining of coal and lignite	2000	1.5%	-64.3%	-5.7%	-64.3%
	2010	11.0%	9.6%	24.7%	9.6%
	2013	-16.9%	-20.3%	-4.3%	-20.3%
Mining of Gold and uranium ore	2000	-0.6%	-65.4%	-7.3%	-65.4%
	2010	-7.7%	-8.3%	4.2%	-8.3%
	2013	-0.7%	-2.5%	16.7%	-2.5%
Mining of Metal ores	2000	0.2%	-65.2%	-1.7%	-65.2%
	2010	26.5%	25.9%	43.4%	25.9%
	2013	3.9%	-0.4%	21.5%	-0.4%
Other Mining and quarrying	2000	6.1%	-63.6%	-3.1%	-63.6%
	2010	19.2%	16.7%	33.6%	16.7%
	2013	1.6%	-2.5%	15.8%	-2.5%

Table 45: Secondary sector: Gross value added, average annual growth by sector (constant 2005 prices)

Gross value added					
Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Food beverages and tobacco products	2000	6.2%	1.8%	4.8%	-0.8%
	2010	7.6%	10.0%	11.1%	9.7%
	2013	3.9%	0.7%	-2.4%	0.3%
Textiles, clothing and leather goods	2000	2.2%	-2.1%	5.5%	-3.5%
	2010	5.5%	8.6%	11.3%	7.8%
	2013	2.0%	-1.3%	-4.4%	-1.7%
Wood and wood products	2000	5.0%	0.4%	6.5%	-1.0%
	2010	9.0%	11.8%	14.4%	11.3%
	2013	0.5%	-3.0%	-5.0%	-3.3%
Fuel, petroleum chemical and rubber products	2000	13.8%	7.3%	13.0%	6.2%
	2010	2.8%	5.5%	5.8%	4.9%
	2013	2.8%	-0.6%	0.5%	-1.0%
Other non-metallic mineral products	2000	0.1%	-6.4%	-0.1%	-6.9%
	2010	11.9%	15.2%	16.4%	14.1%
	2013	1.5%	-1.5%	-2.7%	-2.0%
Metal products machinery and household appliances	2000	3.7%	-2.7%	4.3%	-2.8%
	2010	4.2%	5.9%	7.6%	5.6%
	2013	1.9%	-1.0%	-0.8%	-1.1%
Electrical machines and apparatus	2000	7.3%	1.2%	7.8%	1.1%
	2010	3.4%	6.3%	7.8%	5.5%
	2013	4.1%	0.6%	-0.5%	0.2%
Electronic Sounds/vision, medical & other appliances	2000	2.8%	-2.1%	3.4%	-2.5%
	2010	4.2%	6.7%	9.0%	6.5%
	2013	4.9%	0.9%	-0.5%	0.8%
Transport Equipment	2000	18.3%	11.4%	16.3%	9.1%
	2010	7.8%	10.2%	12.4%	9.9%
	2013	-1.9%	-5.0%	-6.5%	-5.4%
Furniture and other items NEC and recycling	2000	7.4%	1.4%	8.4%	0.7%
	2010	4.6%	7.7%	10.3%	6.8%
	2013	-7.3%	-10.3%	-13.5%	-10.7%
Electricity, gas steam and hot water supply,	2000	1.6%	-6.0%	4.6%	-7.4%
	2010	3.4%	5.0%	3.9%	3.9%
	2013	-1.0%	-3.5%	-0.5%	-3.7%
Collection, purification and distribution of water	2000	3.0%	-3.0%	-3.2%	-3.0%
	2010	4.9%	4.9%	4.5%	4.9%
	2013	1.4%	1.4%	3.3%	1.4%

Table 46: Tertiary sector: Gross value added, average annual growth per sector (constant 2005 prices)

Sector	Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Construction	2000	14.8%	9.5%	-4.5%	8.2%
	2010	1.6%	4.5%	1.5%	3.8%
	2013	2.7%	-0.7%	4.8%	-1.1%
Wholesale and commission trade	2000	9.5%	4.6%	14.9%	3.5%
	2010	2.0%	5.1%	4.5%	4.3%
	2013	3.4%	0.0%	5.1%	-0.5%
Retail trade and repairs of goods	2000	7.2%	2.2%	8.2%	0.8%
	2010	1.8%	4.7%	14.6%	3.9%
	2013	0.8%	-2.4%	4.4%	-2.9%
Sale and Repairs of motor vehicles, sale and fuel	2000	11.5%	5.3%	15.0%	4.4%
	2010	10.8%	13.9%	13.2%	13.0%
	2013	2.9%	-0.4%	5.3%	-0.9%
Hotels and Restaurants	2000	5.6%	0.3%	10.3%	-0.5%
	2010	14.6%	18.1%	17.8%	17.4%
	2013	2.2%	-1.4%	4.3%	-1.7%
Land and water transport	2000	10.7%	5.3%	10.4%	3.7%
	2010	-4.9%	-2.3%	4.7%	-2.9%
	2013	0.1%	-3.0%	1.3%	-3.4%
Air Transport and transport supporting activities	2000	11.3%	4.7%	7.4%	3.6%
	2010	8.1%	10.7%	19.2%	10.3%
	2013	1.8%	-1.6%	2.9%	-1.9%
Post and telecommunication	2000	16.5%	9.0%	15.1%	8.5%
	2010	3.5%	6.2%	14.1%	5.4%
	2013	3.7%	0.5%	4.6%	0.1%
Finance and Insurance	2000	11.9%	7.4%	3.3%	6.2%
	2010	5.4%	8.4%	10.7%	7.7%
	2013	3.4%	-0.1%	2.4%	-0.5%
Real estate activities	2000	4.4%	3.1%	-2.9%	3.5%
	2010	-0.5%	0.4%	0.5%	0.2%
	2013	-0.2%	-2.1%	1.4%	-2.4%
Other Business activities	2000	12.6%	8.0%	2.3%	6.4%
	2010	0.3%	2.9%	4.3%	2.4%
	2013	2.9%	-0.7%	4.2%	-1.1%
Public Administration and defense activities	2000	2.5%	2.5%	4.0%	2.5%
	2010	3.9%	3.9%	0.2%	3.9%
	2013	3.3%	3.3%	2.2%	3.3%
Education	2000	-0.4%	-0.5%	1.0%	-0.5%
	2010	11.0%	11.2%	7.1%	11.2%
	2013	2.2%	2.2%	1.1%	2.2%
Health and Social Work	2000	-2.6%	-2.6%	-1.2%	-2.6%
	2010	9.6%	9.7%	5.8%	9.7%
	2013	2.3%	2.3%	1.2%	2.3%
Other Service activities	2000	-1.8%	-1.8%	-0.4%	-1.8%
	2010	-6.9%	-6.8%	-10.2%	-6.8%
	2013	0.0%	0.0%	-1.1%	0.0%
Total industries	2000	6.1%	0.0%	8.9%	-0.5%
	2010	3.4%	5.0%	6.4%	4.7%
	2013	2.0%	-0.5%	1.3%	-0.7%

Table 47: Average annual growth between 1996 to 2013: Primary sector

Average annual growth between 1996 to 2013				
Sector	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Agriculture and hunting	0.9%	0.9%	0.4%	0.9%
Forestry and logging	1.7%	1.7%	1.7%	1.7%
Fishing operation of fish farms	0.5%	0.5%	0.0%	0.5%
Mining of coal and lignite	4.4%	-3.1%	11.3%	-3.1%
Mining of Gold and uranium ore	-5.8%	-11.5%	2.0%	-11.5%
Mining of Metal ores	5.5%	-2.3%	14.4%	-2.3%
Other Mining and quarrying	3.7%	-4.3%	9.9%	-4.3%

Table 48: Average annual growth between 1996 to 2013: Secondary sector

Average annual growth between 1996 to 2013				
Sector	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Food beverages and tobacco products	2.1%	0.2%	1.6%	-0.7%
Textiles, clothing and leather goods	2.0%	-0.1%	2.3%	-0.9%
Wood and wood products	1.4%	-0.9%	1.7%	-1.5%
Fuel, petroleum chemical and rubber products	3.9%	1.9%	4.5%	1.2%
Other non-metallic mineral products	-0.2%	-2.1%	0.3%	-2.9%
Metal products machinery and household appliances	20.0%	-0.1%	2.8%	-0.3%
Electrical machines and apparatus	3.7%	1.5%	4.2%	1.0%
Electronic Sounds/vision, medical & other appliances	3.6%	0.8%	3.5%	0.5%
Transport Equipment	3.9%	1.7%	3.9%	0.9%
Furniture and other items NEC and recycling	1.3%	-0.8%	1.5%	-1.6%
Electricity, gas steam and hot water supply,	1.1%	-0.1%	2.2%	-0.7%
Collection, purification and distribution of water	1.0%	1.0%	0.9%	1.0%

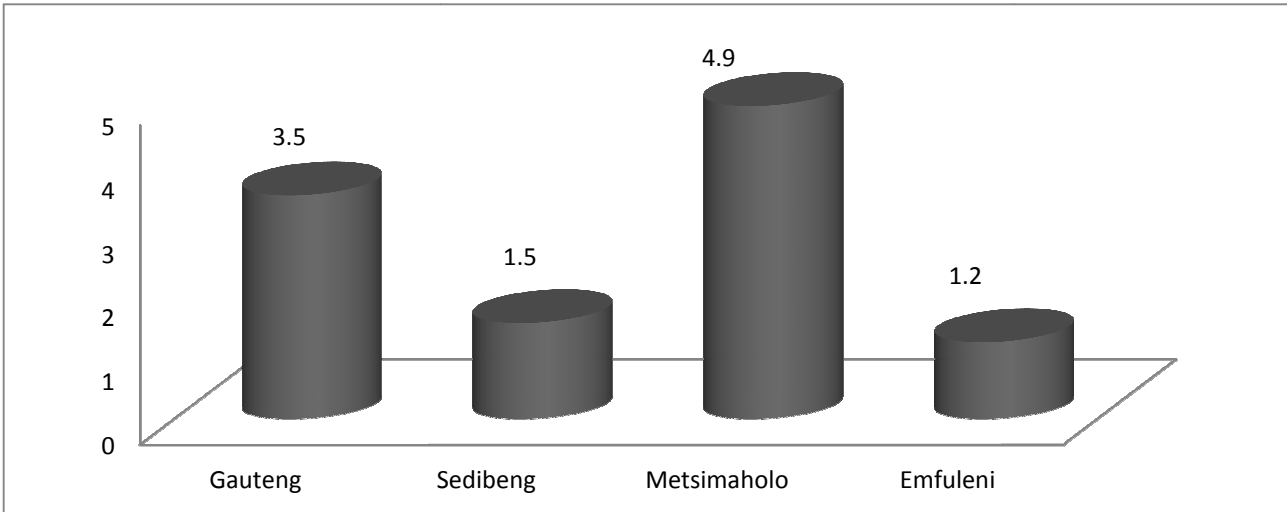
Table 49: Average annual growth between 1996 to 2013: Tertiary sector

Average annual growth between 1996 to 2013				
Sector	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
Construction	6.1%	3.7%	7.8%	2.9%
Wholesale and commission trade	3.7%	1.5%	6.3%	0.7%
Retail trade and repairs of goods	3.1%	0.9%	9.7%	0.0%
Sale and Repairs of motor vehicles, sale and fuel	6.6%	4.2%	9.1%	3.4%
Hotels and Restaurants	3.1%	0.7%	5.7%	0.1%
Land and water transport	2.4%	0.3%	6.6%	-0.6%
Air Transport and transport supporting activities	5.4%	3.1%	9.6%	2.6%
Post and telecommunication	8.4%	5.6%	12.5%	4.9%
Finance and insurance	9.2%	6.6%	11.5%	5.8%
Real Estate	0.8%	3.4%	-1.4%	3.5%
Other business activities	7.4%	5.0%	9.8%	4.2%
Public Administration and defense activities	2.2%	2.2%	2.3%	2.2%
Education	1.6%	1.6%	1.7%	1.6%
Health and social work	4.1%	4.1%	4.2%	4.1%
Other Service activities	1.4%	1.4%	1.5%	1.4%
Total Industries	3.6%	1.5%	5.1%	1.1%

Table 50: Total GDP growth in percentage

Year	Gauteng	Sedibeng DM	Metsimaholo LM	Emfuleni LM
2000	5.7%	-0.1%	8.7%	-0.5%
2010	3.4%	5.1%	6.8%	4.8%
2013	2.2%	-0.3%	2.2%	-0.5%
Average for 1996 - 2013	3.5%	1.5%	4.9%	1.2%

Figure 29: Average GDP growth between 1996 and 2013



Findings:

- The Emfuleni municipal area has the lowest average growth for the years 1996 to 2013 of all areas under comparison.
- The Metsimaholo municipal area has the highest average growth for the same years of all the areas under comparison.

10. INCOME AND EXPENDITURE

In this section income and expenditure will be analysed for the study region.

Figure 30: Overall annual income per capita (in rand at current price): 2000 to 2013

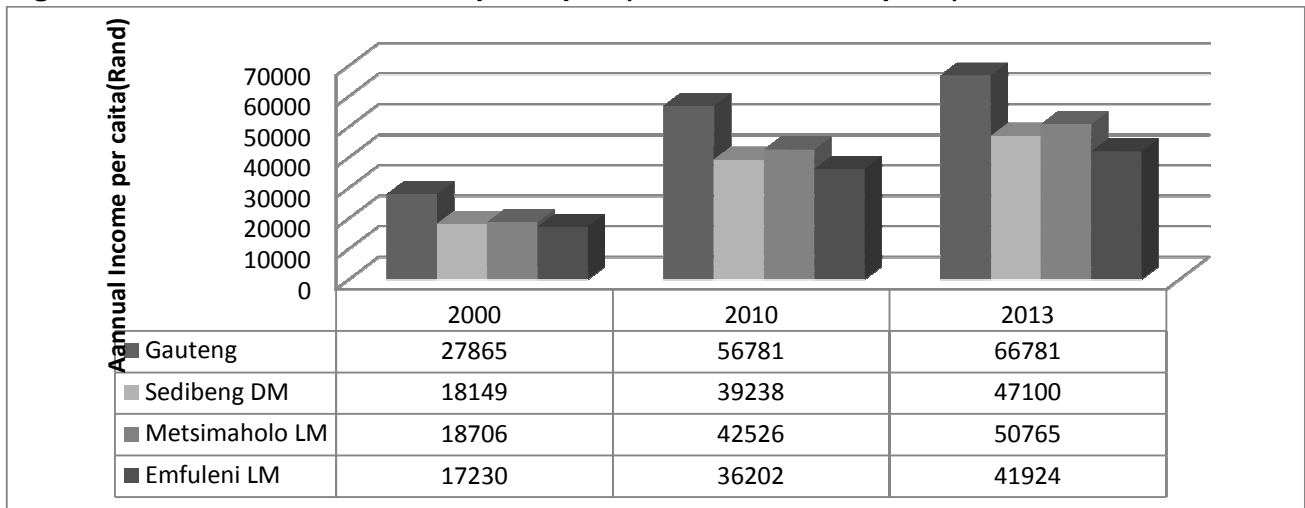
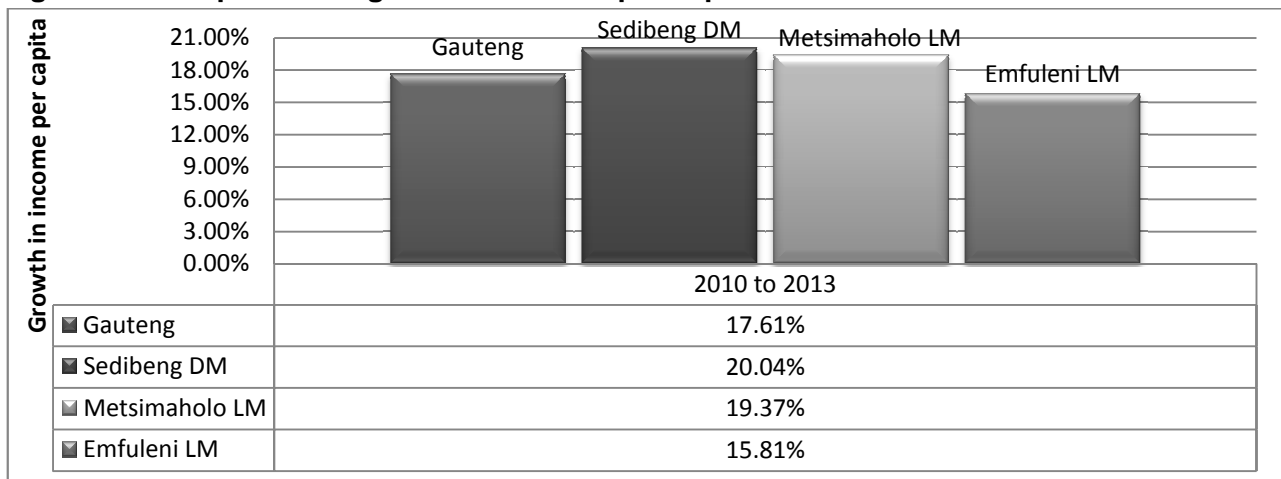


Figure 31: Comparison of growth in income per capita from 2010 to 2013



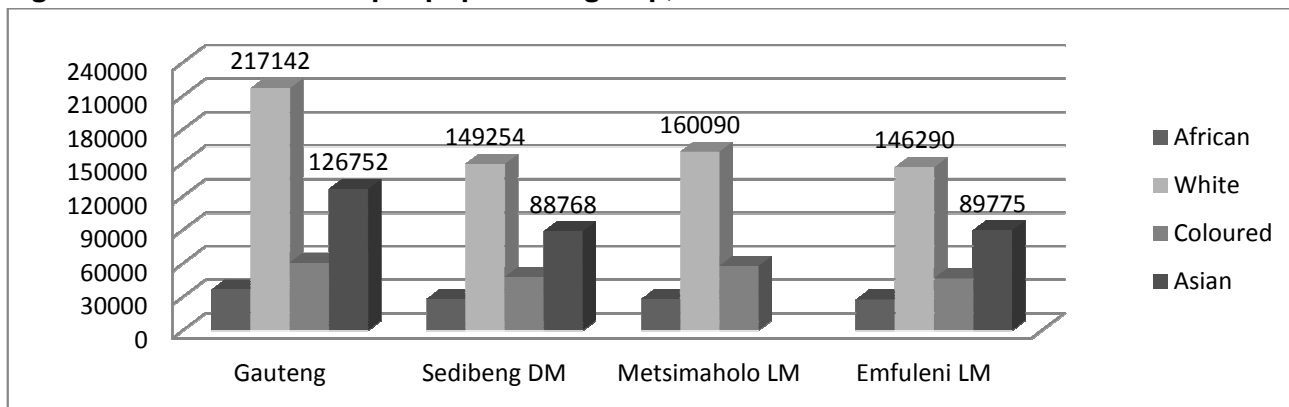
Findings:

- Income per capita in the Emfuleni Municipal area has been at the same level if compared to the Sedibeng district area, but it is below the provincial income level.
- In 2013 the income per capita in the Emfuleni municipal area was below its neighbouring Municipal area of Metsimaholo.
- The percentage growth in income per capita shows that an increase in all areas, but the Emfuleni municipal area has grown slightly slower than the other areas.
- From 2010 to 2013, growth in income per capita in the Emfuleni municipal area was 3.56% less than the growth in the neighbouring Municipal area of Metsimaholo.

Table 51: Summary of annual income per capita (in Rand) by population groups

Year	Area	African	White	Coloured	Asian
2000	Gauteng	13898	73438	20349	36569
	Sedibeng DM	10333	49384	13384	26442
	Metsimaholo LM	10566	46346	--	--
	Emfuleni LM	10466	49791	13433	26703
2010	Gauteng	31376	172104	55134	98988
	Sedibeng DM	24165	116034	41642	64726
	Metsimaholo LM	24271	125809	58385	--
	Emfuleni LM	24153	117134	41329	66113
2013	Gauteng	36796	217142	60824	126752
	Sedibeng DM	28231	149254	47702	88768
	Metsimaholo LM	28049	160090	57956	--
	Emfuleni LM	27742	146290	46657	89775

Figure 32: Annual income per population group, 2013



Findings:

- The White population has the highest income per capita in all regions; while the Black population has the lowest income per capita in all regions. Thus, there is a large gap in annual income per capita between the Black and White populations across all the areas considered.
- For the Emfuleni Municipal area the gap decreased in 2010 but it increased again in 2013.
- For the years considered 2000, 2010 and 2013, income per capita amongst the Black population in the Emfuleni Municipal area has been less than that of the Black population within the Metsimaholo municipal area.

Figure 33: Overall annual income per household

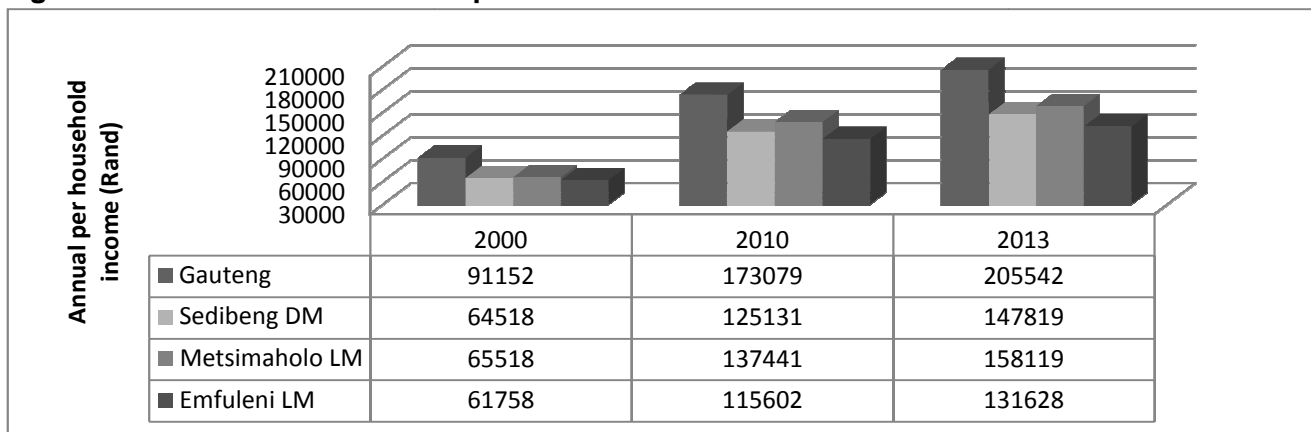


Figure 34: Annual household income: A comparison between Emfuleni and Metsimaholo Municipal areas

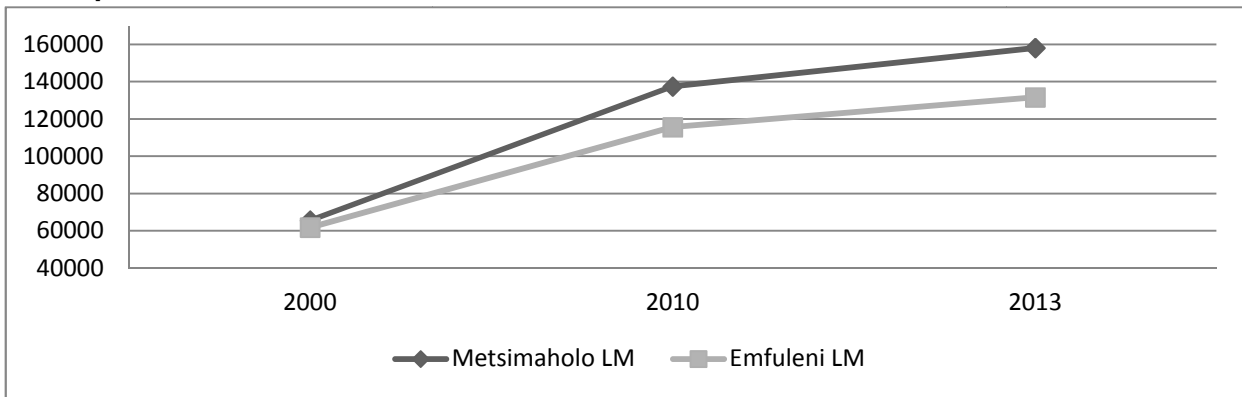
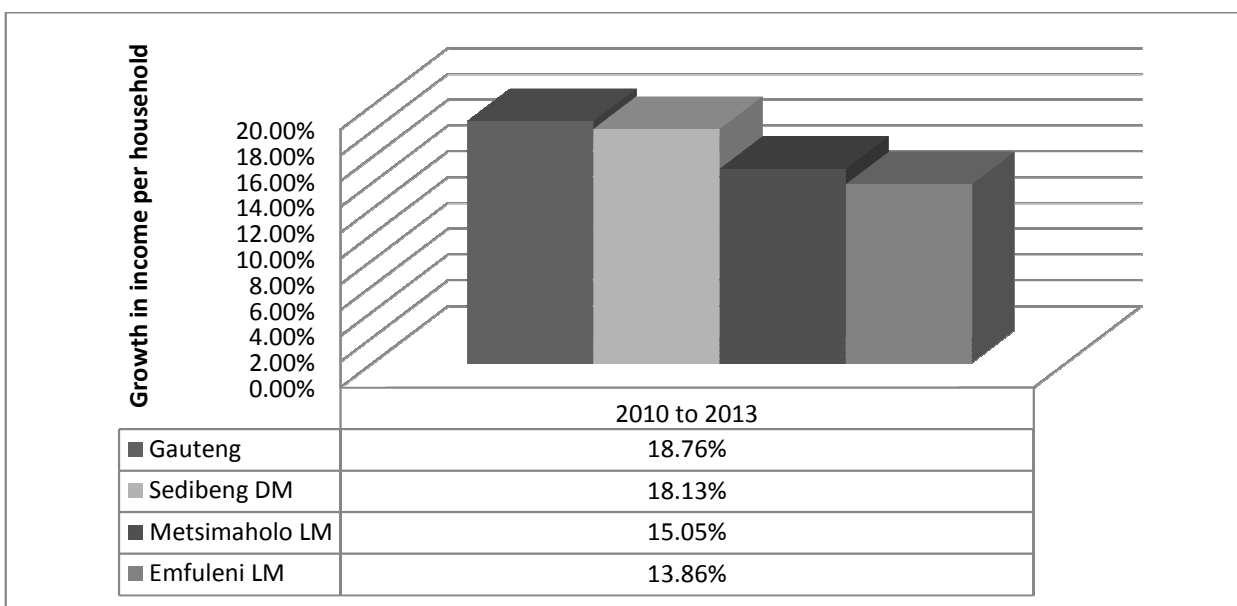


Figure 35: Comparison of growth in income per household: 2010 to 2013



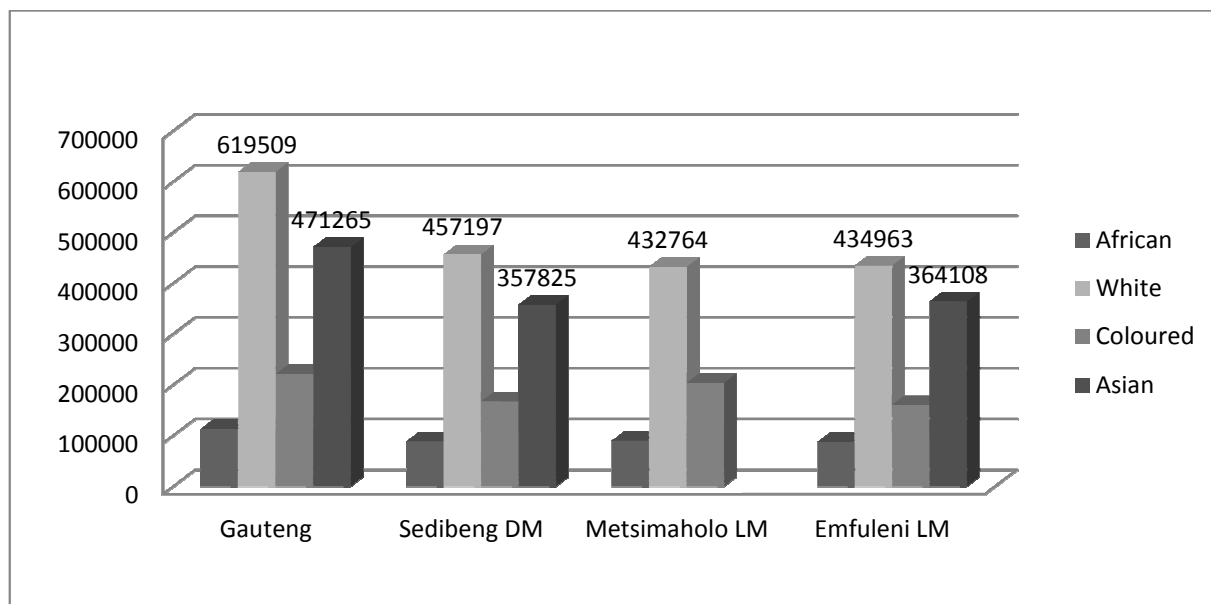
Findings:

- The overall income per household has been increasing in all areas under comparison. The annual per household income in the Emfuleni Municipal area is similar to that of the Sedibeng district area but it is lower than the annual per household income if compared with the Metsimaholo municipal area.
- The average income per household in the Emfuleni Municipal area is lower than the average income per a household in the neighbouring Municipal area of Metsimaholo.
- Although the income per household in the Emfuleni Municipal area has grown by 13.86% from 2010 to 2013, it is still below the growth of 15.05% in the municipal area of Metsimaholo. Thus, the Emfuleni Local Municipality should promote economic activities which increase households' earnings.

Table 52: Annual income per household income by population group

Year	Area	African	White	Coloured	Asian
2000	Gauteng	46 825	208 800	88 172	139 761
	Sedibeng DM	38 294	150 822	54 512	110 275
	Metsimaholo LM	37 446	156 247	----	----
	Emfuleni LM	39 024	148 540	53 738	109 586
2010	Gauteng	96 148	482 794	203 031	348 205
	Sedibeng DM	77 163	361 662	143 171	250 804
	Metsimaholo LM	80 065	372 777	212 713	-----
	Emfuleni LM	77 499	355 570	139 128	256 095
2013	Gauteng	113 418	619 509	221 785	471 265
	Sedibeng DM	88 621	457 197	167 310	357 825
	Metsimaholo LM	90 174	432 764	204 149	-----
	Emfuleni LM	87 423	434 963	160 364	364 108

Figure 36: Annual household income per population group, 2013



Findings:

- In the all regions under comparison, the White population has the highest level of annual per household income, while the African households have relatively low annual income.
- In 2013 the household income amongst the African population of the Emfuleni Municipal area was lower than that of both the Sedibeng district area and the Metsimaholo municipal area.

Table 53: Income categories in 2011

Income category	Emfuleni LM (%)	Metsimaholo LM (%)
No income	17.7	13.2
R1 – R19 600	27.3	26.8
R 19 601 – R 76 600	30.9	33.1
R 76 601 – R 307 600	18.1	19.0
More than R 307 601	5.9	7.9

Figure 37: Comparative analysis of total annual expenditure by product type from 2010 to 2013

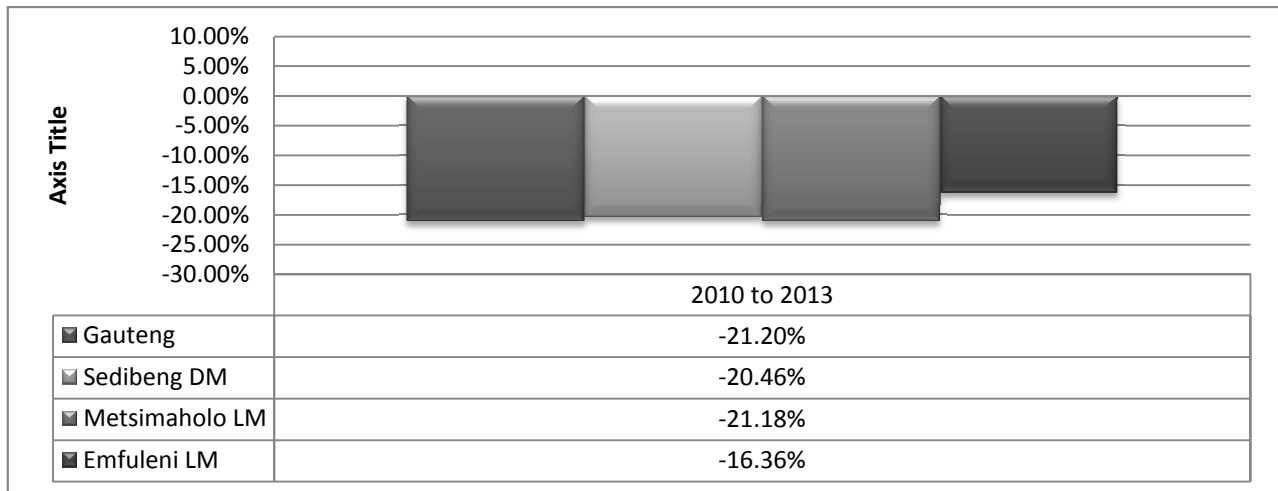
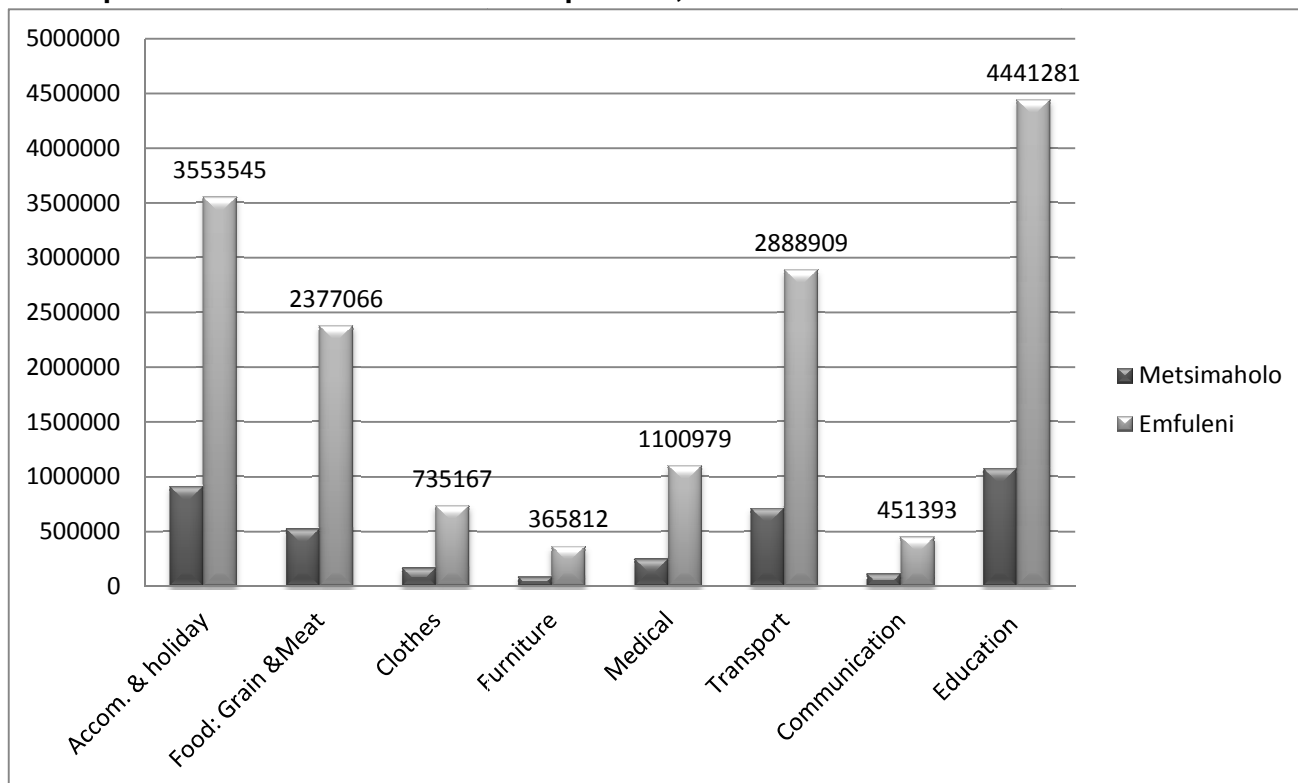


Table 54: Annual expenditure by product type (R1 000)

Year	Areas	Accommodation & holiday	Grain & Meat	Clothes	Furniture	Medical	Transport	Communi-cation.	Education
2000	Gauteng	30 197 614	18 234 551	7 364 021	4 344 636	11 708 657	31 735 287	5 926 269	49 370 213
	Sedibeng DM	1 588 260	1 198 527	455 666	244 310	699 976	1 658 729	329 880	2 688 585
	Metsimaholo LM	250 909	188 414	161 700	38 187	199 887	258 414	52 807	511 108
	Emfuleni LM	1 223 875	973 022	371 360	196 844	568 204	834 943	254 463	1 657 610
2010	Gauteng	121 528 310	64 521 752	33 918 325	9 086 310	43 004 635	108 379 844	16 284 421	167 668 900
	Sedibeng DM	6 138 378	3 902 266	1 293 204	489 074	1 782 278	5 338 408	845 624	7 966 310
	Metsimaholo LM	1 129 185	673 708	224 262	85 525	309 787	951 716	153 640	1 415 143
	Emfuleni LM	4 100 792	2 917 303	954 180	354 583	1 308 763	3 668 186	575 517	5 552 466
2013	Gauteng	98 276 607	50 207 628	14 730 918	8 862 147	23 593 065	79 113 284	12 045 305	114 751 654
	Sedibeng DM	5 024 310	3 091 042	963 642	481 962	1 445 604	3 973 055	631 022	6 049 681
	Metsimaholo LM	912 894	522 864	165 504	84 014	249 518	711 808	113 303	1 074 629
	Emfuleni LM	3 553 545	2 377 066	735 167	365 812	1 100 979	2 888 909	451 393	4 441 281

Figure 38: Spending on selected goods and services: A comparison between Emfuleni municipal area and Metsimaholo municipal area, 2010



Findings:

- The reports of growth in total expenditure shows that from 2000 to 2010, the total annual expenditure increased significantly in all areas, with the Emfuleni municipal area reporting a the lowest rate of increase if compared to all the other areas under comparison.
- Surprisingly, from 2010 to 2013 total expenditure decreased in all areas with the lowest decrease in the Emfuleni Municipal area.
- With regards to annual expenditure on major products and services, the Emfuleni Municipal area spent more than the Metsimaholo area on most of the products and services considered, especially in 2013.
- For example, spending in accommodation and holidays in the Emfuleni Municipal area constitutes 70% of the whole Sedibeng district area’s spending in accommodation and holidays. Furthermore, annual expenditure on accommodation and holidays in the Emfuleni area is close to four times that of the annual spending on the same products in the Metsimaholo area.
- This high level of spending on products and services in the Emfuleni Municipal area is mainly related to a much larger population if compared to the Metsimaholo area. Thus, analysis of purchasing power in relation to population with shed more light in this regards.

Table 55: Comparison to income and expenditure in relation to purchasing power index

Year	Area	National Population share	National income share	National retail index share
2000	Gauteng	20.2%	37.3%	34.9%
	Sedibeng DM	1.7%	2.1%	1.8%
	Metsimaholo LM	0.3%	0.3%	0.2%
	Emfuleni LM	1.4%	1.6%	1%
2010	Gauteng	23.1%	36.8%	36%
	Sedibeng DM	1.8%	1.9%	1.9%
	Metsimaholo LM	0.3%	0.3%	0.3%
	Emfuleni LM	1.4%	1.4%	1.0%
2013	Gauteng	24.0%	35.8%	34.7%
	Sedibeng DM	1.8%	1.9%	1.8%
	Metsimaholo LM	0.3%	0.3%	0.4%
	Emfuleni LM	1.4%	1.3%	1.0%

Findings:

- The summary of income and expenditure in relation to the purchasing power index shows that the Emfuleni Municipal area's share of National income has been approximately at the same level with its share of national population.
- The Emfuleni Municipal area's share in the purchasing power index (national retail index) has been below its population share. This is different to the purchasing power of Gauteng province and Sedibeng, which is above or equal to the national population share.
- Even the neighboring Municipal area of Metsimaholo has purchasing power index that is equal or greater than its population share. This implies that, relative to other areas considered in this analysis, the Emfuleni Municipal area has low levels of buying power and high levels of poverty.
- Surprising the share of income is in line with the share of population; meaning that this issue of low purchasing power in the Emfuleni Municipal area is not caused by low level of income. Hence, one of the possible causes may be high prices of retail products in the Emfuleni Municipal area relatively to other areas as it was shown by high level of annual expenditure in most products in the area.

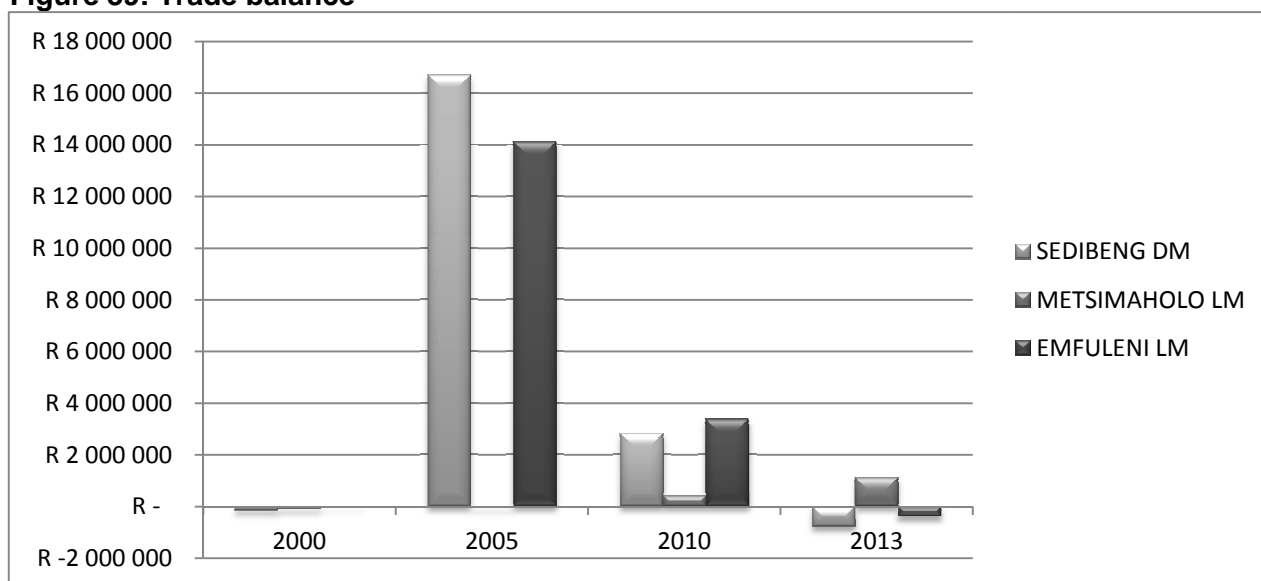
11. TRADE (EXPORT AND IMPORT)

In this section the trade balance, imports and exports are analysed for the study region for the years 2000, 2005, 2010 and 2013.

Table 56: Total trade balance

TOTAL TRADE BALANCE (R 1000's)				
	2000	2005	2010	2013
Gauteng	9 886 255	2 267 813	57 881 539	41 372 463
Sedibeng DM	-168 709	16 696 060	2 839 676	-794 881
Metsimaholo LM	-100 074	-47 401	426 680	1 129 160
Emfuleni LM	-30 829	14 122 253	3 381 216	-393 683

Figure 39: Trade balance



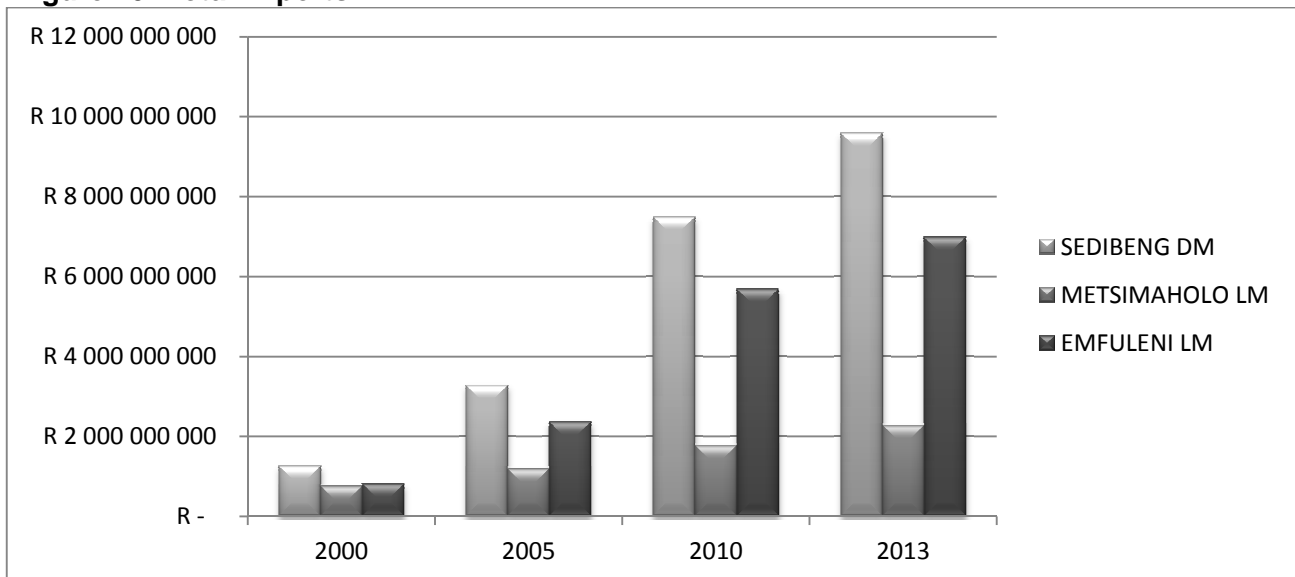
Findings:

- Of all the areas under consideration, only the Metsimaholo area has shown constant trade balance growth from 2010 to 2013.
- The Emfuleni area has shown a significant decrease regarding the trade balance since 2010. This situation is problematic and characterizes a diminishing local economy and economic base.

Table 57: Total imports

TOTAL IMPORTS (R1000)				
	2000	2005	2010	2013
Gauteng	111 548 624	206 875 053	382 670 782	574 857 152
Sedibeng DM	1 257 795	3 281 098	7 488 022	9 586 974
Metsimaholo LM	755 932	1 188 448	1 775 762	2 274 725
Emfuleni LM	810 981	2 366 282	5 685 621	6 984 789

Figure 40: Total imports



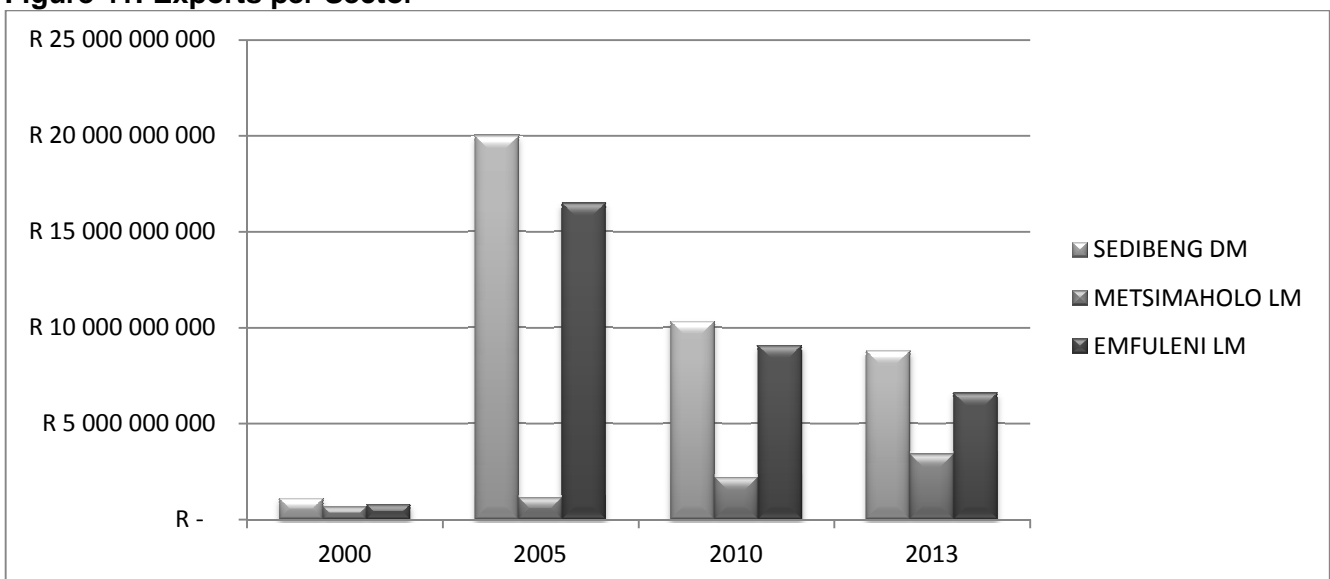
Findings:

- Imports have been increasing since 2000 to 2013, at a faster rate than the export rate.

Table 58: Total exports

TOTAL EXPORTS (R 1000)				
	2000	2005	2010	2013
Gauteng	121 434 880	209 142 866	440 552 322	616 229 616
Sedibeng DM	1 089 086	19 977 158	10 327 678	8 792 093
Metsimaholo LM	655 857	1 141 047	2 202 442	3 403 885
Emfuleni LM	780 152	16 488 535	9 066 837	6 591 106

Figure 41: Exports per Sector



Findings:

- Both the Gauteng Province and the Metsimaholo area has shown export growth, but the Sedibeng and Emfuleni areas have shown a decrease in export activities.

**Table 59: Trade per Sector 2013 and Growth from 2000-2013
(Figure in brackets % calculated to Gauteng export)**

Sector	Emfuleni LM		Metsimaholo LM	
	Amount	% growth 2000-2013	Amount	% growth 2000-2013
Mining of metal ores	4 663 000 (0.003%)	39.3	751 400	65.5
Other mining and quarrying	7 530 000 (0.08%)	411.7	861 636	-27.9
Food, beverage and tobacco	13 241 000 (0.1%)	827.8	1 922 988	15.1
Textiles, clothing and leather	26 392 000 (0.6%)	860.9	9 156 000	-87.9
Wood and wood products	12 484 000 (0.1%)	44.8	2 218 000	458.6
Fuel, petroleum, chemicals and rubber	148 580 000 (0.2%)	1279.1	3 049 173 000	492.6
Other non-metallic mineral products	334 768 000 (8.1%)	1944.5	46 901 000	2396.1
Metal products, machinery and appliances	5 699 890 000 (5.6%)	799.2	225 163 000	737.1
Electrical machinery and apparatus	138 190 000 (1.4%)	1669.8	18 333 000	2306.0
Electronic, vision, sound, medical and other appliances	33 575 000 (0.3%)	1729.7	5 861 000	651.2
Transport equipment	145 128 000 (0.3%)	6666.2	20 873 000	8239.2
Furniture	7 056 000 (0.03%)	-92.1	1 384 700	-98.1
Electricity, gas, steam and hot water	0 (0.0%)	0	0	0
TOTALS	6 571 497 000 (1.1%)		3 382 596 000	

Findings:

- Most sub-sectors have shown growth in export from 2000 to 2013 in the Emfuleni and Metsimaholo areas. The sub-sectors metal products, machinery and appliances are still the largest export sub-sector by far followed by non-metallic mineral products.
- The sub-sector which shows the highest growth regarding export from 2000 to 2013 is transport equipment followed by non-metallic products.
- The Emfuleni area only contributes 1.1% of the total Gauteng provincial exports.

12. TOURISM

This section will analyse the tourism sector within Gauteng, Sedibeng District Municipal area, the Metsimaholo Municipal area and the Emfuleni Municipal area. The following sub-sections will be discussed: number of trips by type, number of trips per origin, growth and tourism spending.

The following sub-section will analyse the number of holiday / leisure trips, business trips, visits to friends and relatives, other trips for example medical, religious etc. and the combined total trips done within the Gauteng province, Sedibeng District Municipal area, the Metsimaholo Municipal area and the Emfuleni Municipal area.

Table 60: Number of Holiday/Leisure Trips

	2001	2005	2010	2013
Gauteng	1 239 950	1 085 756	1 744 556	1 927 098
Sedibeng DM	53 225	44 812	81 423	64 738
Metsimaholo LM	16 085	16 720	19 065	9 691
Emfuleni LM	32 185	25 595	43 402	46 052

Findings:

- All areas showed a growth in number of holiday / leisure trips from 2001 to 2013 except Metsimaholo.
- During 2005 only Metsimaholo had an increase in trips from 2001 figures however it was very a small increase.
- Gauteng experienced an increase in growth of 55.4% from 2001 to 2013, Sedibeng 21.6 % and Emfuleni 43%.
- Metsimaholo was the only area that experienced negative growth in the number of holiday / leisure trips from 2001 to 2013 (-39.7%).
- The sharp decline in number of holiday / leisure trips to Metsimaholo LM could be dew to neglect of the area from the local municipality (services, pollution, maintenance etc).
- During 2001 Emfuleni made up 2.6% of Gauteng's figures and 2.4 % during 2013.
- During 2001 Emfuleni made up 60.5% of Sedibeng's figures and 71.7% during 2013.

Table 61: Number of Business Trips

	2001	2005	2010	2013
Gauteng	849 690	926 929	1 481 251	1 905 243
Sedibeng DM	32 700	34 254	58 725	74 863
Metsimaholo LM	11 874	15 661	18 513	20 765
Emfuleni LM	27 877	28 634	45 952	58 187

Findings:

- All areas showed a growth in number of business trips from 2001 to 2013.

- Gauteng experienced an increase in growth of 124.2% from 2001 to 2013, Sedibeng 128.9 % and Emfuleni 108.7%.
- Metsimaholo was the only area which growth in the number of business trips from 2001 to 2013 did not more than double (74.9%).
- During 2001 Emfuleni made up 3.3% of Gauteng's figures and 3.1% during 2013.
- During 2001 Emfuleni made up 85.3% of Sedibeng's figures and 77.7% during 2013.

Table 62: Number of Trips: Visits to Friends and Relatives

	2001	2005	2010	2013
Gauteng	2 696 313	3 838 305	4 383 462	3 818 522
Sedibeng DM	203 584	308 875	393 009	422 798
Metsimaholo LM	44 811	53 283	106 872	146 368
Emfuleni LM	160 652	244 818	309 287	335 785

Findings:

- All areas showed a growth in number of visits to friend and relatives from 2001 to 2013.
- Gauteng experienced an increase in growth of 41.6% from 2001 to 2013, Sedibeng 107.7% and Emfuleni 109%.
- Metsimaholo had the largest growth of visits to friends and relatives from 2001 to 2013 (226.6%).
- During 2001 Emfuleni made up 6% of Gauteng's figures and 8.8% during 2013.
- During 2001 Emfuleni made up 78.9% of Sedibeng's figures and 79.4% during 2013.

Table 63: Number of Other Trips: Medical, Religious etc.

	2001	2005	2010	2013
Gauteng	428 122	459 707	521 817	543 795
Sedibeng DM	40 903	42 632	43 624	48 311
Metsimaholo LM	5 210	5 531	5 820	5 560
Emfuleni LM	34 086	35 734	36 770	40 601

Findings:

- All areas showed a growth in number of other trips from 2001 to 2013.
- Gauteng experienced an increase in growth of 27% from 2001 to 2013, Sedibeng 18.1% and Emfuleni 19.1%.
- Metsimaholo was the only area which growth in the number of other trips from 2001 to 2013 did not reach double digits (6.7%).
- During 2001 Emfuleni made up 8% of Gauteng's figures and 7.5% during 2013.
- During 2001 Emfuleni made up 83.3% of Sedibeng's figures and 84% during 2013.

Table 64: Number of Total Trips

	2001	2005	2010	2013
Gauteng	5 214 074	6 310 697	8 131 086	8 194 658
Sedibeng DM	330 412	430 573	576 780	610 710
Metsimaholo LM	77 979	91 194	150 270	182 385
Emfuleni LM	254 800	334 780	435 412	480 625

Findings:

- All areas showed a growth in number of other trips from 2001 to 2013.
- Gauteng experienced an increase in growth of 57.2% from 2001 to 2013, Sedibeng 84.8% and Emfuleni 88.6%.
- Metsimaholo was the only area which growth in the number of total trips from 2001 to 2013 grew by more than 100% (133.9%).
- During 2001 Emfuleni made up 4.9% of Gauteng's figures and 5.9% during 2013.
- During 2001 Emfuleni made up 77.1% of Sedibeng's figures and 78.7% during 2013.
- The growth in number of total trips for Sedibeng, Metsimaholo and Emfuleni is shown in figure 42.

Figure 42: Number of Total Trips

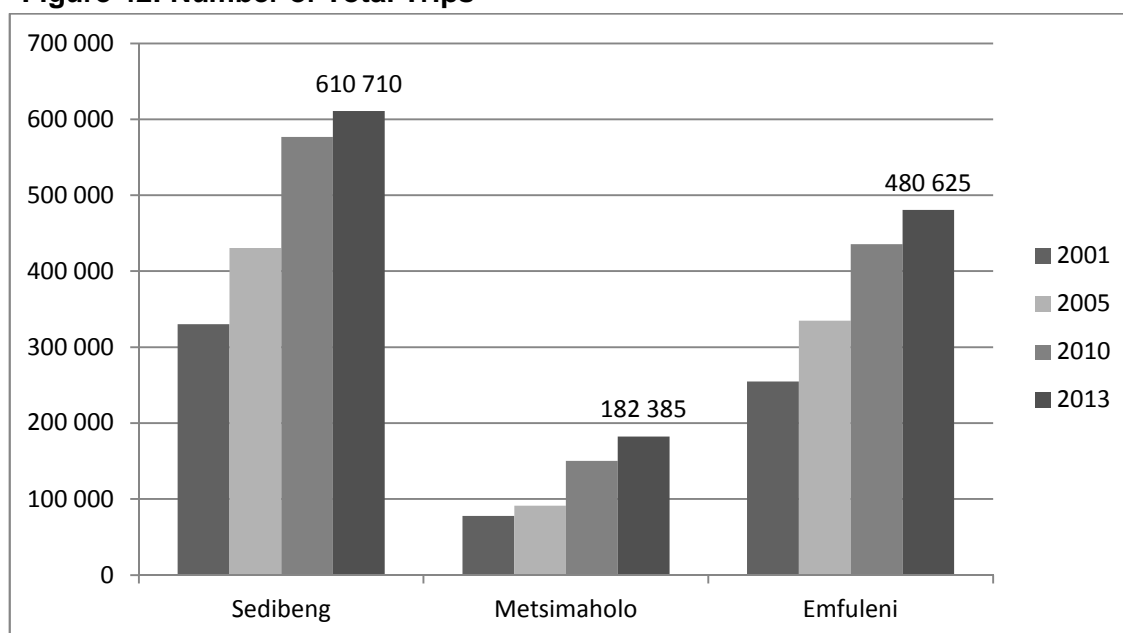


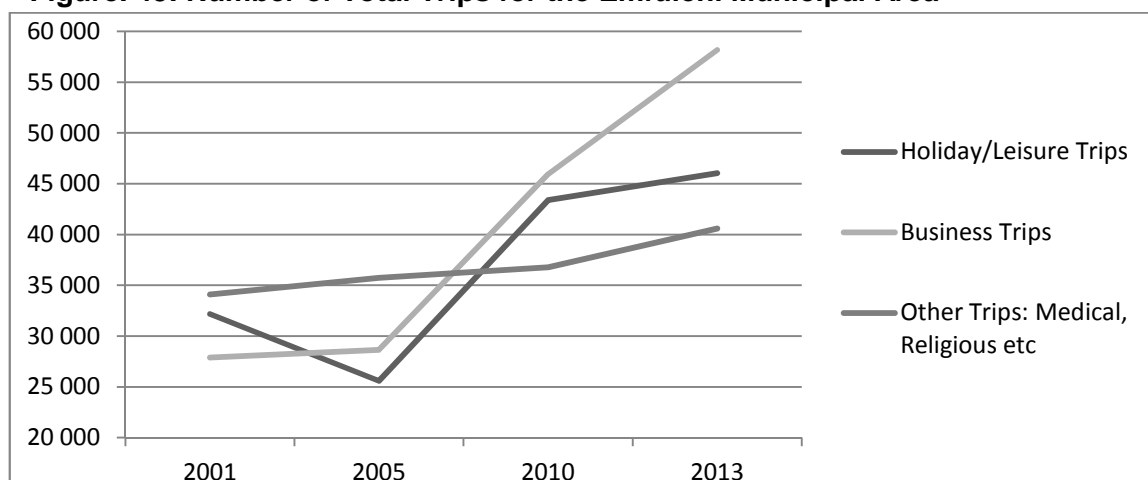
Table 65: Trips to Emfuleni Municipal Area

	2001	2005	2010	2013
Leisure / Holiday	32 185	25 595	43 402	46 052
Business	27 877	28 634	45 952	58 187
Friends / Relatives	160 652	244 818	309 287	335 785
Other Trips	34 086	35 734	36 770	40 601
Total Trips	254 800	334 780	435 412	480 625

Findings:

- Trips made to Emfuleni were mostly for the purpose of people visiting friends and relatives in the area.
- During 2001, 63% of total trips made to the Emfuleni area were by people visiting friends and family and this figure grew to 69.8% during 2013.
- Leisure / holiday trips made up 12.6%, business trips made up 10.9% and other trips (medical, religion etc.) made up 13.3% of total trips during 2001.
- During 2013 leisure / holiday trips made up 9.5%, business trips made up 12.1% and other trips (medical, religion etc.) made up 8.4% of total trips made to the Emfuleni area.

Figure. 43: Number of Total Trips for the Emfuleni Municipal Area



Findings:

- Figure shows the number of holiday / leisure, business and other trips for the Emfuleni Municipal area for the years 2001, 2005, 2010 and 2013.
- Business trips showed strong growth, while holiday /leisure and other trips also showed an increase but at a lesser gradient.

The following sub-section will analyse the number of trips per origin for domestic tourists, international tourists and total tourists. Analysis will include data for the Gauteng province, Sedibeng District Municipal area, Metsimaholo Local Municipal area and Emfuleni Local Municipal area for 2001, 2002, 2005, 2010, 2012 and 2013.

Table 66: Number of Trips per origin: Domestic Tourists

	2001	2005	2010	2013
Gauteng	3 885 212	4 994 398	5 218 479	4 775 714
Sedibeng DM	273 162	374 823	425 052	406 195
Metsimaholo LM	65 996	80 190	126 144	152 792
Emfuleni LM	208 621	290 466	322 653	319 011

Findings:

- All areas showed a growth in number of domestic tourist trips from 2001 to 2013.
- Gauteng experienced an increase in growth of 22.9% from 2001 to 2013, Sedibeng 48.7% and Emfuleni 52.9%.
- Metsimaholo was the only area which growth in the number of domestic tourist trips from 2001 to 2013 exceeded 100% growth (131.5%).
- During 2001 Emfuleni made up 5.4% of Gauteng's figures and 6.7% during 2013.
- During 2001 Emfuleni made up 76.4% of Sedibeng's figures and 78.5% during 2013.

Table 67: Number of Trips per origin: International Tourists

	2001	2005	2010	2013
Gauteng	1 328 863	1 558 367	2 912 608	3 418 943
Sedibeng DM	57 250	67 745	151 728	204 515
Metsimaholo LM	11 983	13 220	24 126	29 593
Emfuleni LM	46 179	53 252	112 779	161 614

Findings:

- All areas showed a growth in number of international tourist trips from 2001 to 2013.
- Gauteng experienced an increase in growth of 157.3% from 2001 to 2013, Sedibeng 257.2%, Metsimaholo 147% and Emfuleni 250%.
- During 2001 Emfuleni made up 3.5% of Gauteng's figures and 4.7% during 2013.
- During 2001 Emfuleni made up 80.7% of Sedibeng's figures and 79% during 2013.

Table 68: Number of Trips per Origin: Total Tourists

	2001	2005	2010	2013
Gauteng	5 214 074	6 310 697	8 131 086	8 194 658
Sedibeng DM	330 412	430 573	576 780	610 710
Metsimaholo LM	77 979	91 194	150 270	182 385
Emfuleni LM	254 800	334 780	435 412	480 625

Findings:

- All areas showed a growth in number of total tourist trips from 2001 to 2013.
- Gauteng experienced an increase in growth of 57.2% from 2001 to 2013, Sedibeng 84.8%, and Emfuleni 88.6%.
- Metsimaholo was the only area which growth in the number of total tourist trips from 2001 to 2013 exceeded 100% growth (133.9%).
- During 2001 Emfuleni made up 4.9% of Gauteng's figures and 5.9% during 2013.
- During 2001 Emfuleni made up 77.1% of Sedibeng's figures and 78.7% during 2013.
- The number of total trips per origin for Emfuleni, Metsimaholo and Sedibeng is shown in figure 44.

Figure 44: Number of Trips per Origin: Total Tourists

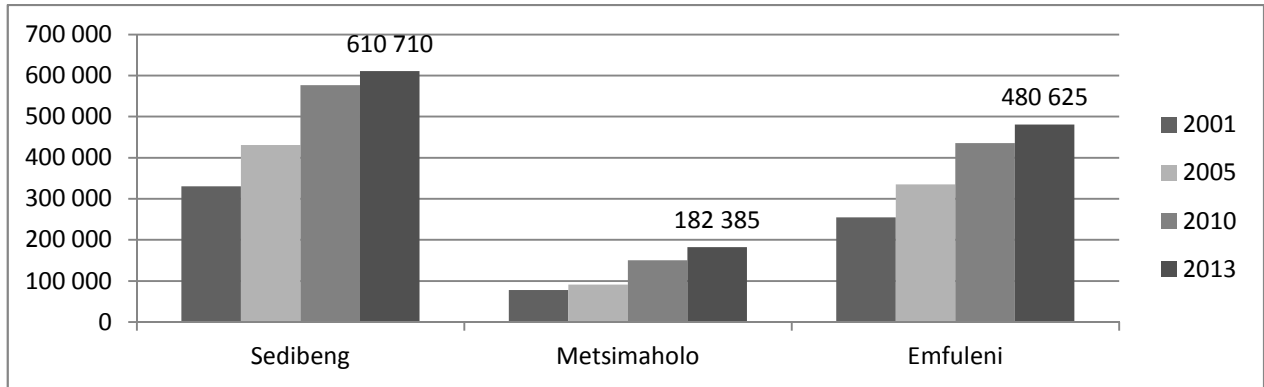


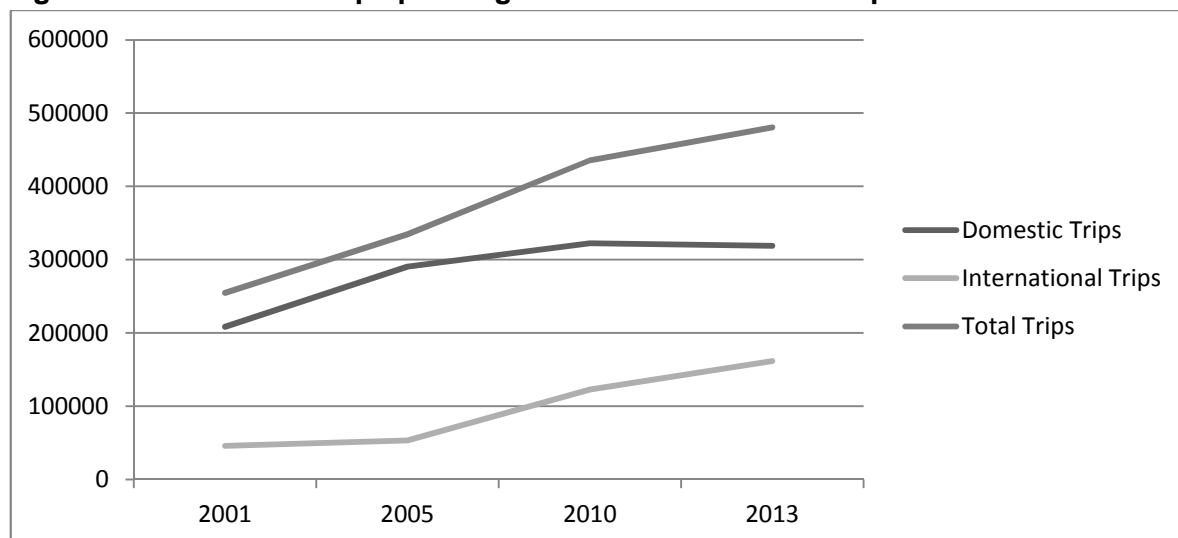
Table 69: Number of Trips per Origin to Emfuleni Municipal Area

	2001	2005	2010	2013
Domestic Trips	208 621	290 466	322 653	319 011
International Trips	46 179	53 252	112 779	161 614
Total Trips	254 800	334 780	435 412	480 625

Findings:

- During 2001 domestic trips made up 81.9% and international trips made up 18.1% of total trips made to the Emfuleni Municipal area and during 2013 these figures were 66.4% (domestic trips) and 33.6% (international trips).
- These figures clearly show that more international tourists visited this area during 2013 than during 2001.

Figure 45: Number of Trips per Origin for the Emfuleni Municipal Area



Findings:

- Figure 45 shows the number of holiday / leisure, business and other trips for the Emfuleni Municipal area for the years 2001, 2005, 2010 and 2013.
- Business trips showed strong growth, while holiday /leisure and other trips also showed an increase but at a lesser gradient.

Table 70: Growth in Tourism by Origin

	Domestic Tourists				International Tourists				Total Tourists			
	2002 (%)	2005 (%)	2010 (%)	2012 (%)	2002 (%)	2005 (%)	2010 (%)	2012 (%)	2002 (%)	2005 (%)	2010 (%)	2012 (%)
Gauteng	19.8	-11.3	7.0	5.9	8.7	3.3	16.4	0.8	16.3	-7.5	11.2	3.4
Sedibeng DM	21.7	-8.8	7.5	7.6	9.3	6.2	20.9	8.7	19.1	-6.3	12.0	8.0
Metsimaholo LM	13.7	-12.9	15.7	14.1	6.2	-7.6	11.8	44.6	11.9	-11.9	14.8	21.5
Emfuleni LM	22.1	-8.4	6.6	8.1	8.6	4.2	20.6	10.3	19.0	-6.4	11.2	9.0

Findings:

- Domestic, international and total growth rates by origin had mostly positive growth rates in the various periods except during 2005.
- All area experiences negative growth for domestic tourists during 2005, only Metsimaholo had international tourist negative growth during 2005 and the combined figures are once again negative for all areas.
- The total growth rates are graphically illustrated in Figure 46.

Figure 46: Growth in Tourism by Origin: Total Tourists (%)

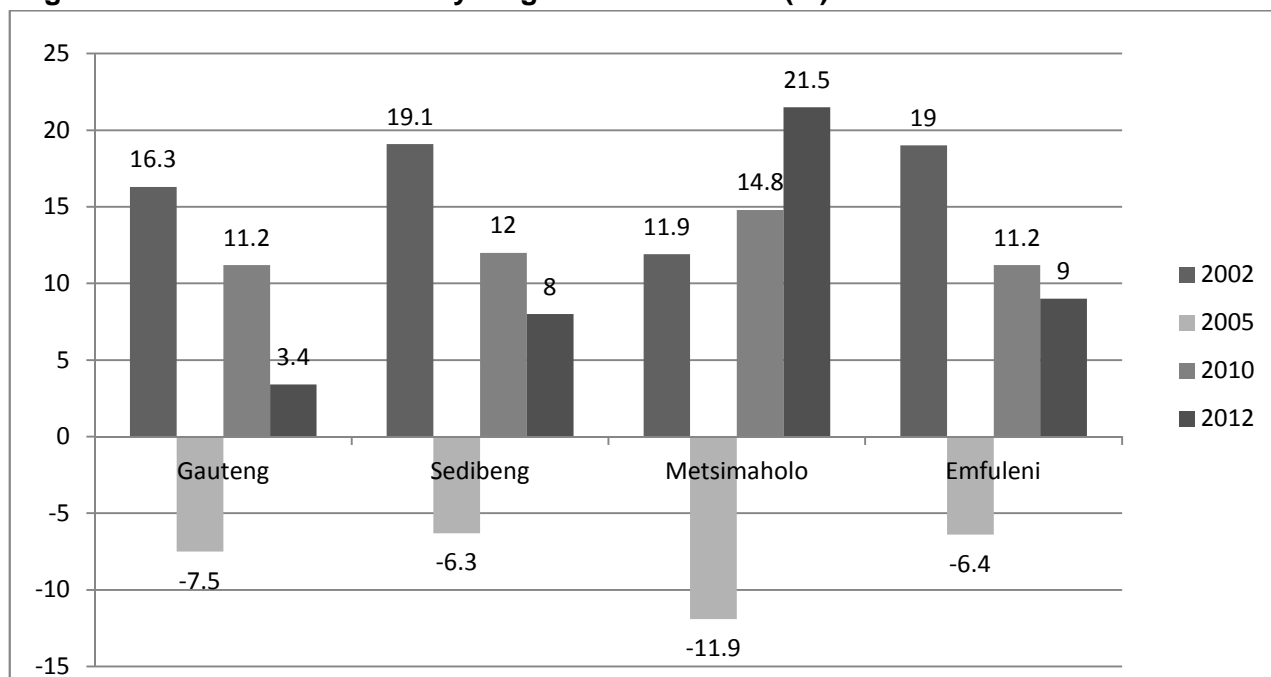


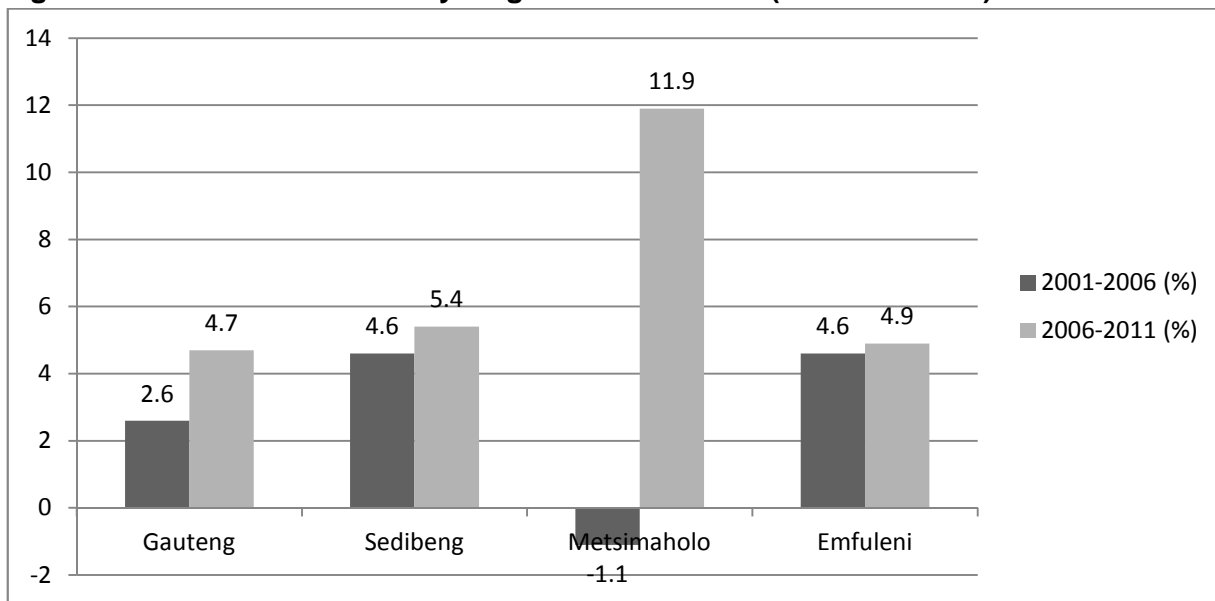
Table 71: Growth in Tourism by Origin

	Domestic Tourists		International Tourists		Total Tourists	
	2001-2006 (%)	2006-2011 (%)	2001-2006 (%)	2006-2011 (%)	2001-2006 (%)	2006-2011 (%)
Gauteng	2.0	-0.3	3.9	12.5	2.6	4.7
Sedibeng DM	4.4	0.3	5.6	17.9	4.6	5.4
Metsimaholo LM	-0.8	11.5	-2.1	13.1	-1.1	11.9
Emfuleni LM	4.7	-0.3	4.2	17.6	4.6	4.9

Findings:

- If the 6 year combined growth rates are calculated all areas experienced a positive growth in domestic, international and total growth rates except for domestic, international and total tourists in Metsimaholo during the period 2001-2006, domestic tourists in Gauteng and Emfuleni for the period from 2006 -2011.
- This is graphically illustrated in Figure 47.

Figure 47: Growth in Tourism by Origin: Total Tourists (6 Year Periods)



The following sub-section will analyse the tourism spending including percentage of GDP spending and growth in tourism by origin for domestic, international and total tourists. Analysis will include data for the Gauteng province, Sedibeng District Municipal area, Metsimaholo Local Municipal area and Emfuleni Local Municipal area for 2001, 2005, 2010, 2012 and 2013. Growth rates for combined years will also be calculated.

Table 72: Total Tourism Spending (R1000)

	2001	2005	2010	2013
Gauteng	19 404 155	30 215 079	49 776 148	69 370 396
Sedibeng DM	854 524	1 424 131	2 563 990	3 527 055
Metsimaholo LM	185 785	241 550	489 734	855 917
Emfuleni LM	639 348	1 050 981	1 790 405	2 634 851

Findings:

- All areas showed a growth in total tourist spending from 2001 to 2013.
- Gauteng experienced an increase in growth of total tourism spending of 257.5% from 2001 to 2013, Sedibeng 312.8%, Metsimaholo 360.7% and Emfuleni 312.1%.
- During 2001 Emfuleni made up 3.3% of Gauteng's figures and 3.8% during 2013.
- During 2001 Emfuleni made up 74.8% of Sedibeng's figures and 74.7% during 2013.

Table 73: Total Tourism Spending as % of GDP

	2001	2005	2010	2012
Gauteng	5.6	5.5	5.4	5.7
Sedibeng DM	6.6	6.9	7.3	8.4
Metsimaholo LM	1.9	1.5	1.6	2.2
Emfuleni LM	6.1	6.3	6.5	7.7

Findings:

- Sedibeng experienced the highest percentage spending of GDP each year for all the areas.
- Emfuleni experienced larger percentage spending of GDP than Gauteng each year.
- These figures are graphically illustrated in Figure 48 and 49.

Figure 48: Total Tourist Spending as Percentage of GDP (Per Year)

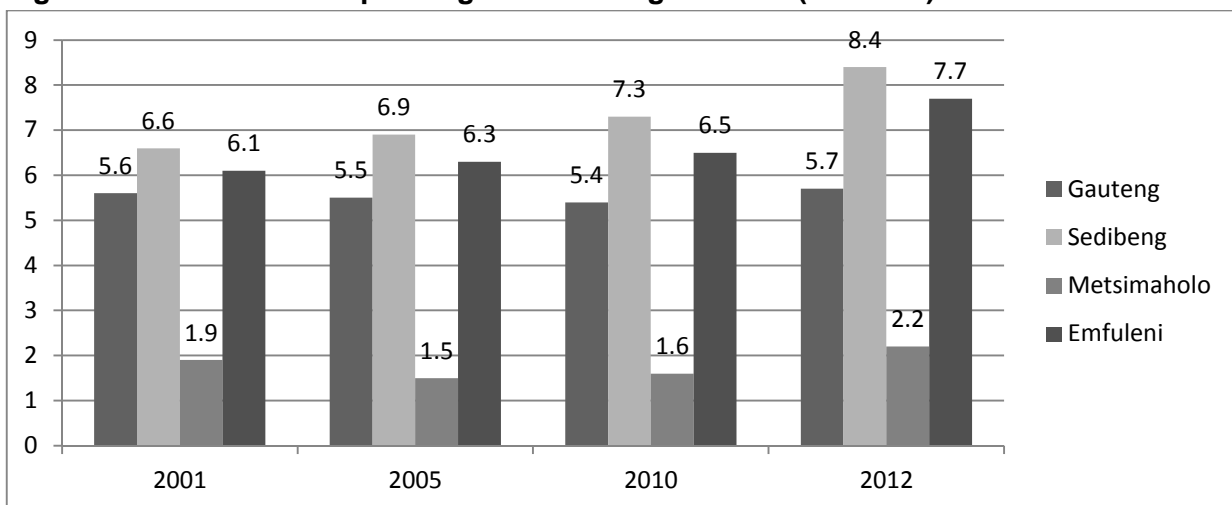


Figure 49: Total Tourist Spending as Percentage of GDP (Per Area)

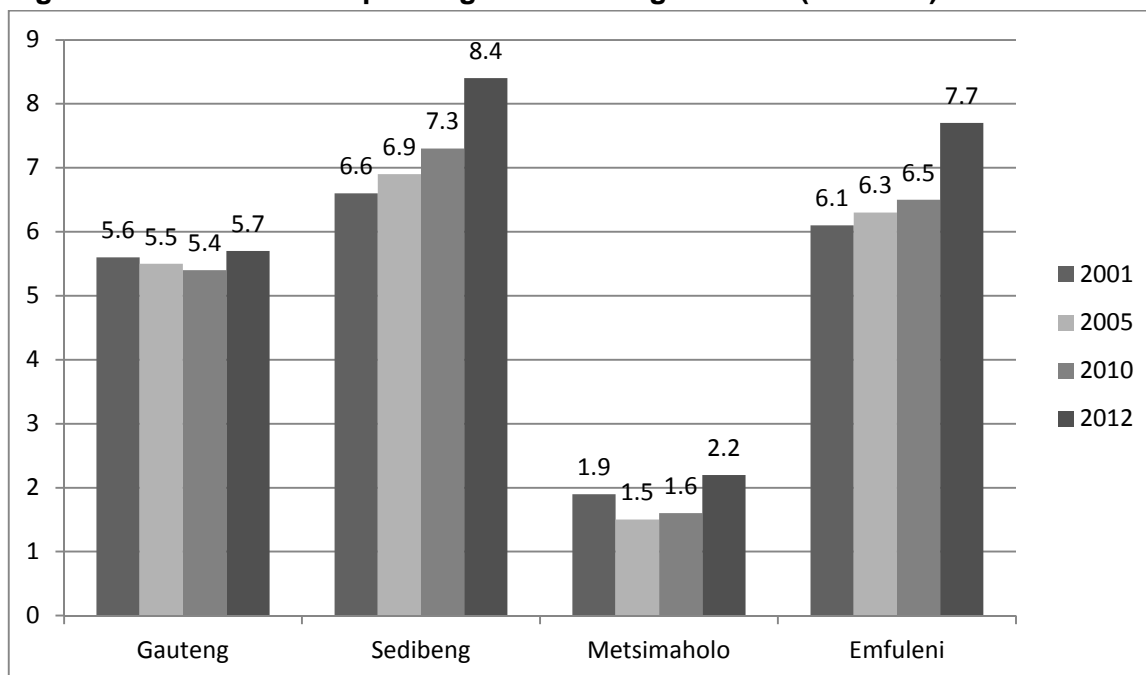


Table 74: Average Tourism Spending per Resident Capita (Rand)

	2001	2005	2010	2012
Gauteng	2 085	2 941	4 246	5 078
Sedibeng DM	1 090	1 734	2 864	3 655
Metsimaholo LM	1 529	1 851	3 327	4 932
Emfuleni LM	991	1 579	2 538	3 286

Findings:

- All areas showed a growth in total tourist spending per resident capita from 2001 to 2013.
- Gauteng experienced an increase in growth of total tourism spending per resident capita of 143.5% from 2001 to 2012, Sedibeng 235.3%, Metsimaholo 222.6% and Emfuleni 231.6%.

13. PROVISIONAL FOCUS AREAS

After the socio-economic analysis, the following provisional focus areas are listed:

- The study area are experiencing low population growth rates since 1996 to 2013 of between 0.7% to 1.3 per annum. The growth rates are low if compared to the Gauteng Province with an average growth rate of 2.5%.
- The HDI in the study area is also lower than in Gauteng Province. The significant difference exists between the HDI of the Black population compared with the White population in the study area with HDI of 0.6 and 0.86 respectively.

- Poverty levels are high at 40.75 of the total population, if compared to The Metsimaholo area with a poverty level of 36.8%. The Black population has a poverty level of 46.1%.
- The poverty gap for the Black population has grown from 2011 to 2013 from R3 688 to R4 568 per household.
- The provision of formal housing has been at a better overall level if compared to Gauteng Province. In the study area 83.1% of households resides in formal housing while for Gauteng 78.6% resides in formal housing. The housing backlog in the study area has stabilized and major housing projects are still required as flagship projects for LED.
- The provision of basic infrastructure services in the study area are at a relatively high level with an overall index of 0.87. The overall index for Gauteng is at 0.83.
- Serious crimes have declined over the last decade.
- GDP growth in the study area has been low and 2013 even resulted in a negative growth rate of -0.5%. For the period from 1996 to 2013 the GDP growth was also low at 1.2%.
- GDP per capita in the study area is also relatively low. The Gauteng area has twice the per capita GDP of the study area and the Metsimaholo area has a five time higher GDP per capita.
- The diversification (tress index) of the local economy has improved from 2000 to 2013 by 16% to an index of 58. Gauteng province has an index of 50.
- Specialization and comparative advantages (location quotient) in the study area include sectors such as manufacturing, electricity, construction, finance, and community services.
- Unemployment levels in the study area are at 36.4% in 2013 or approximately 106 568 people.
- The total number of jobs in the study area have decreased from 158 000 in 2011 to 155 000 in 2013. The primary sector has declined as well as the secondary sector in general. The metal sub-sector has declined from 19 000 to 18 000 in 2013. The total manufacturing sector has declined from 28% of employment in 2005 to 20% in 2013. The knowledge economy has grown in the study area in terms of most tertiary sub-sectors with trade, motor trade, government, education, and health and community services with the highest increases.

- The informal sector only contributes 16% to total employment, or only 24 800 of 155 000 total employment. (Brazil, India at more than 30%). Informal trade accounts for 50% of informal jobs.
- The top 4 sectors for employment are community services, trade, manufacturing and finance.
- GVA sectors as percentage of total GVA for the study area are metal products (24.2%), real estate activities (15.3%), education (9.5%), health and social service (5.5%) and public administration (4.8%).
- The total income per capita in the study area is relatively low with slow growth at R41 924 compared to the Gauteng province at R 66 700. The Black population still lacks behind with a per capita income of R 27 700. A total of 17.7% households have no income while 45% of households have income of R 20 000 or less per annum. There is an overall decline in income levels in the study area if compared to national income levels from 1.6% to 1.3% contribution to national income.
- The trade balance in the study area has declined significantly since 2010. In 2010 the trade balance was R 3.4 billion, but decreased to – R 390 million in 2013.
- Tourism has shown growth in the study area over the last decade. Total trips to the area have increased from 250 000 trips in 2000 to 480 000 trips in 2013, relating to an overall growth in trips of 88%. Domestic tourism has however declined while international tourism has shown strong growth. Tourism spending has shown a 312% growth from 2000 to 2013, while tourism's contribution to total GDP has increased to 7.7%.

14. CONCLUSION

The socio-economic analysis of the study area has provided a “mixed-bag” of success and failures as well as opportunities, potentials and risk conditions. The aim of this report was to present a comprehensive analysis of the key components of the local situation in the study area. The report will provide stakeholders with decision making information which will be used to compile integrated strategies. Problematic areas will be supported and growth areas will be further boosted in terms of policy.