



Greater Ellis Park Performance Survey 2006

Prepared for the JDA by

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INTRODUCTION

The Business Plan for Greater Ellis Park envisions that “The Greater Ellis Park area will be a secure, safe, vibrant and sustainable World Class Competitive and leading destination of choice for Sports and Recreation within the City of Johannesburg. It will be a well managed and highly integrated Inner City multi-nodal area of highly appealing and diverse opportunities to live, play, work, visit, get educated, shop and get entertained, and relax.”

The development will in support of the development vision achieve the following strategic objectives:

- To reverse and curb the economic, social and physical declining trend that characterise the area.
- To promote the economic regeneration of the area and opportunities for the increased revenues to the City of Johannesburg Metropolitan Council.
- To promote the area as a major destination of sport and related entertainment.
- To protect and reinforce the cultural and social heritage of the area essential to its image and identity.
- To unlock and maximise the potential of the area and reinforce its unique characteristics, which is essential to its marketability.
- To enhance the sense of arrival and place; strengthen gateways.
- Recommend a regime for maintenance and management of the area.
- Reinforce synergy, integration and identity of the area as a coherent urban whole.
- Promote a flexible and adaptable development, which can sustain mixed uses and be investment friendly.
- Ensure that the development complements the other Inner City Regeneration Initiatives and NASREC Development of the City of Johannesburg.
- Foster opportunities for the public sector, agencies and utilities, provincial government to work together with the private sector.
- Promote a holistic and integrated development that addresses social, economic, physical and environmental needs of the area.

The Business Plan outlines Key Performance Indicators, which will be used to measure and monitor the performance of the development, as indicated below. These were formulated on the basis of the key concerns raised by various stakeholders, potential investors and also from expectations by the JDA as an agency of the City of Johannesburg Metropolitan Council. This 2006 report builds on the baseline data of 2005 and follows the methodology adopted in other areas within Johannesburg including Kliptown, the Inner City, Randburg and Yeoville.

Key Performance Areas and Indicators

Key Performance Area	Key Performance Indicators
Key Socio-Economic Indicators	
Economic development	Increase in Tax Base in GEP area
	Increased Fixed Investment into the area
	Increased creation of employment opportunities
Creating a 24-hour and 7 day Place of the City	Attendance at Ellis Park Stadium
	Attendance at Jhb Athletics Stadium
	Attendance at Standard Bank Arena
Increased Confidence in the area	Increasing awareness and support of the development
	Increased Business Activity
	Satisfaction of Stakeholders with the Development
Development Management	Projects implemented according to the Business Plan
Law Enforcement	Reduction in Crime
	Reduction in illegal uses and occupation
Increased Sense of Place and Ownership	Increased community involvement in maintenance of public space
	Increased use of public space
Property Market	Reduction in Vacancy Rates
	Increased highest and best use and maintenance of properties
	Increased sales of properties
	Increased Residential
Key Public Environment Indicators	
Quality and Well Managed designed physical environment	Overall Cleanliness of public space
	In crease better use of community facilities
	Reduction in vandalism of public facilities
	Public facilities used as planned

2. GREATER ELLIS PARK TREND DATA

2.1 Entertainment/Sports Activities

An integral part of the vision for the Greater Ellis Park Area is that it should be a 24-hour city which is vibrant and central to the city's cultural life. Ensuring the viability and growth of the various cultural, sports and entertainment centres is thus an important element of the revitalisation efforts. Although the JDA does not have a direct responsibility for these entertainment and cultural activities, it does indirectly affect their prospects through the development and management of the Ellis Park environs.

This section presents the attendance statistics for various important sports/entertainment venues within the Ellis Park area. It is clear that these sports venues have been struggling over the past few years as a result of the degeneration of the area although there have been some positive signs of late that attendance may be picking up as a result of the revitalisation of the Inner City. The Greater Ellis Park revitalisation plan should stimulate this even further.

With South African hosting the 2010 Soccer World Cup, Ellis Park has become one of the key focus areas in Johannesburg. This means that thousands of tourists will be brought into the area. This makes the revitalization programme even more important as Ellis Park will need to showcase to tourists what Johannesburg and South Africa has to offer. This is an ideal opportunity for Johannesburg to create a favourable impression internationally.

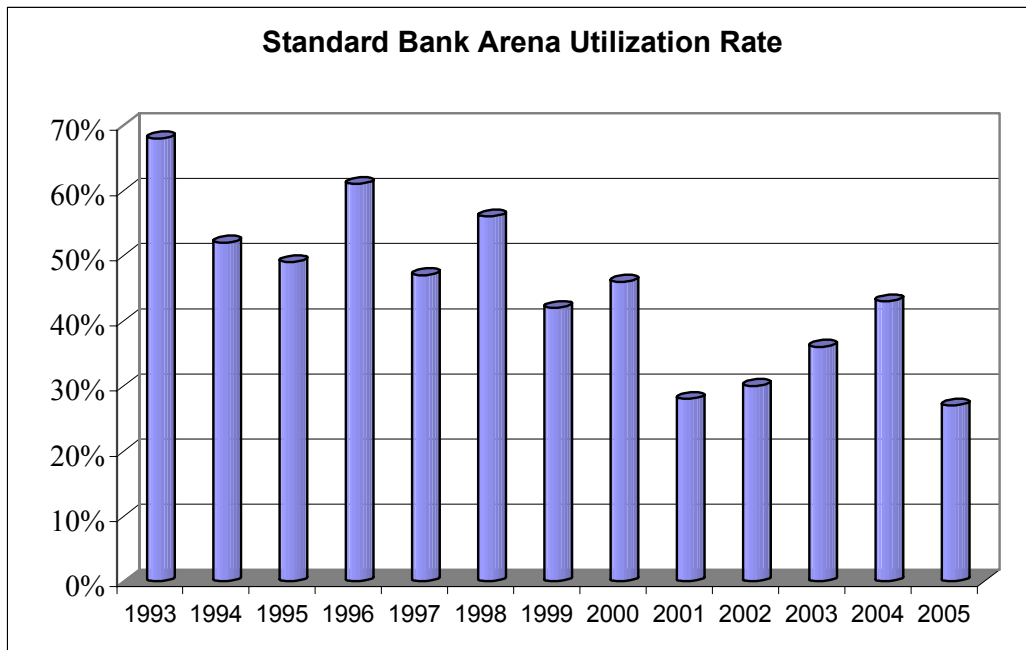
An announcement was made early in 2005 by the Metro that the Ellis Park precinct will get a R2-billion upgrade to transform the area into "a secure, safe, vibrant and sustainable world class, competitive and leading destination of choice for sports and recreation within the city of Johannesburg." With this in mind there must in the next few years be a significant turnaround in the area.

Standard Bank Arena

Year	Utilisation Rate
1993	68%
1994	52%
1995	49%
1996	61%
1997	47%
1998	56%
1999	42%
2000	46%
2001	28% ^a
2002	30%
2003	36%
2004	43%
2005	27% ^b

a: The reason for this low figure is due to the lack of any major sporting or musical events that year as well as the loss of the MTN Gladiators.

b: In 2005 it was decided to allow the Standard Bank Arena to be used for smaller events of approximately 5000 people as they were struggling to find enough large events. Thus they hosted many events but at a lower utilization rate.



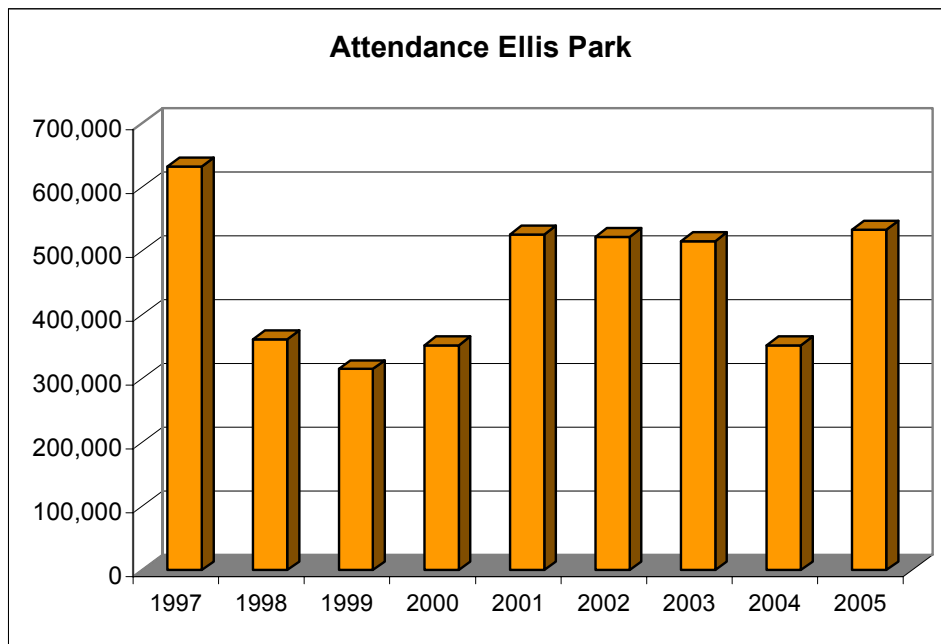
Greater Ellis Park

Year	Ellis Park	Standard Bank Arena	Johannesburg Stadium
1997	632,253		
1998	362,076		
1999	314,973		
2000	352,620		
2001	525,658		
2002	522,045		
2003	515,458		
2004 ^a	352,211	171,600	242,888
2005	533,618 ^c	94,300	13,500 ^b

a: The reason for the decline was due to Chiefs having moved to FNB Soccer City

b: Only two events were held at the Johannesburg stadium in 2005.

c: Ellis park is again being utilized for Soccer



2.2 Building Plans

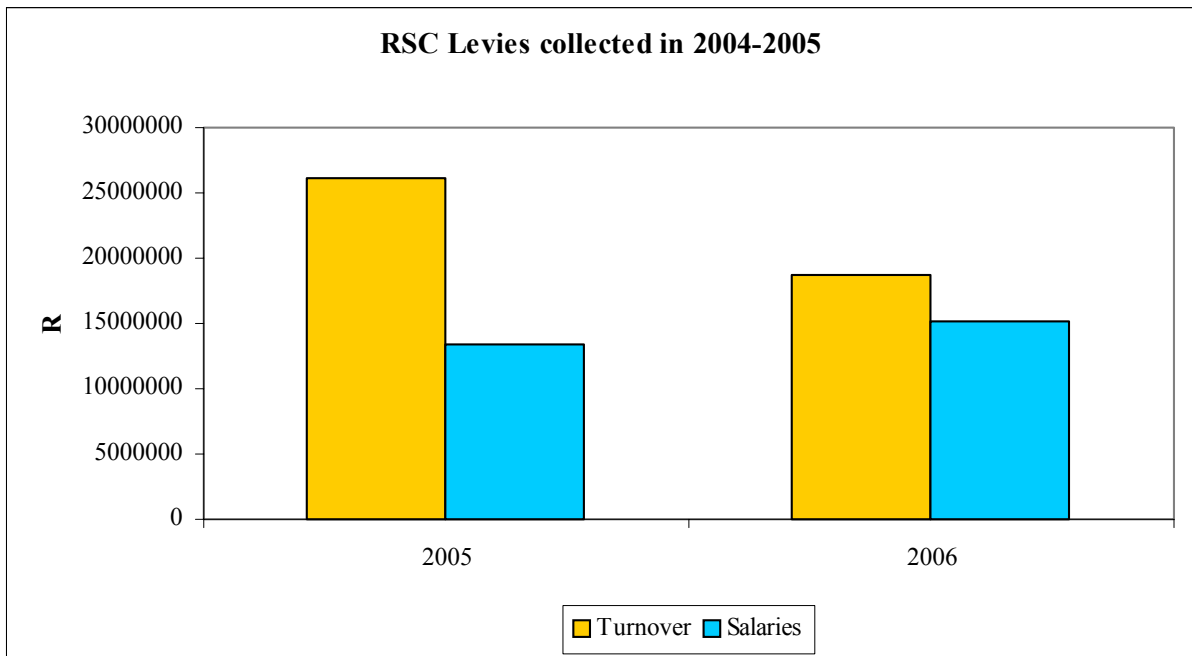
As regards building plans ~ no satisfactory data on building plans has been received for 2005.

2.3 RSC Levies

The table below presents the data for the RSC (Regional Services Council) levies for the Greater Ellis Park Area. The data is important as these taxes are levied upon business turnover and their salary expenditure. As a result it gives an indication of trends as regards business activity and employment levels in the Greater Ellis Park Area. It should be cautioned, however, that RSC levies are notoriously volatile. Nevertheless, it remains a useful guide for our baseline for future monitoring.

RSC LEVIES COLLECTED FOR THE GREATER ELLIS PARK

SURBURB	2004		2005	
	TURNOVER	SALARIES	TURNOVER	SALARIES
BEZVALLEY	118,978.00	54,599.00	229,741.00	125,019.00
DOORNFONTEIN	2,089,008.00	1,599,440.00	2,202,680.00	1,832,042.00
JEPPESTOWN	18,395,855.00	9,066,571.00	11,811,092.00	11,176,205.00
JUDITH PAARL	566,986.00	250,830.00	552,804.00	125,721.00
LORENTZVILLE	179,814.00	83,677.00	149,624.00	47,933.00
NEWDOORNFONTEIN	4,004,887.00	2,069,354.00	2,906,605.00	1,549,238.00
TROYEVILLE	823,536.00	295,027.00	830,022.00	314,019.00
TOTAL ELLIS PARK	26,179,064.00	13,419,498.00	18,682,568.00	15,170,267.00



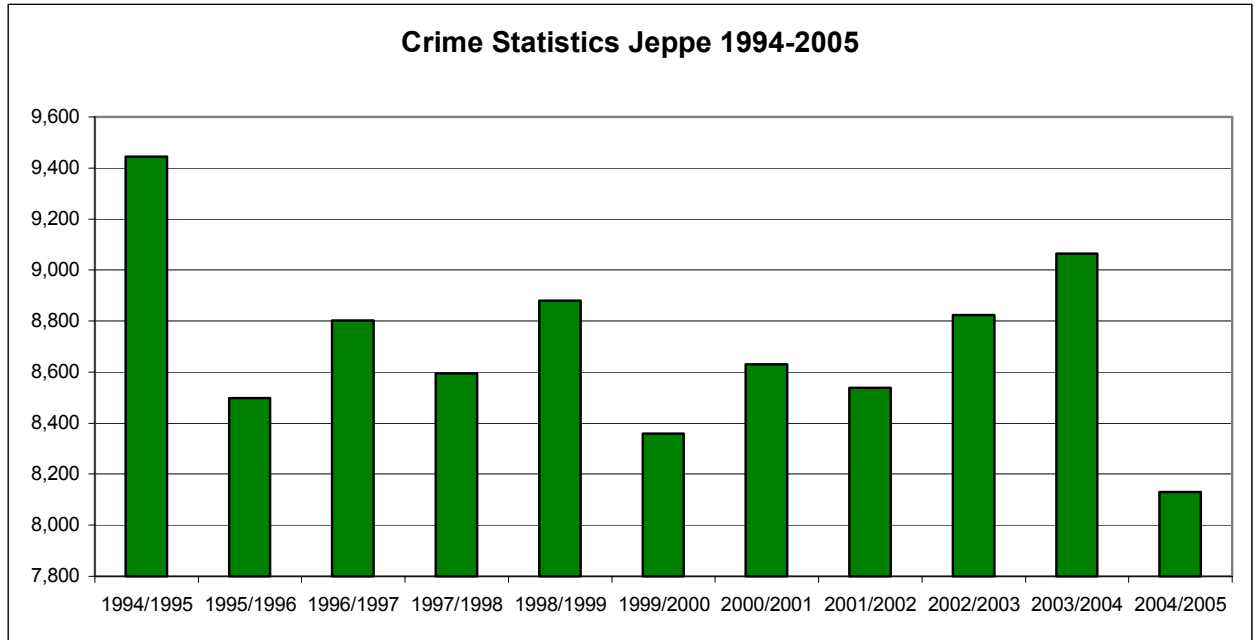
2.4 Crime statistics

The SAPS crime statistics for 2005 are very encouraging with reported crime down just under 10 percent at the Jeppe police station, which is the central station of the area. This is the first significant decrease in crime in the area in last five years. What is particularly pleasing is that serious crimes such as murder and attempted murder are dramatically down. With the World Cup using Ellis Park as a venue in 2010 it is important that crime be reduced dramatically to ensure the safety of visitors watching the World Cup soccer matches at Ellis Park and to create a favourable impression of Johannesburg.

Crime Statistics: Jeppe 1994-2005

Crime Category	Aril to March										
	94/95	95/96	96/97	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05
Murder	123	96	123	110	113	115	133	114	109	106	77
Rape	109	96	127	135	121	117	108	130	113	106	115
Attempted murder	81	81	73	86	94	78	81	100	136	132	97
Assault with the intent to inflict grievous bodily harm	427	411	476	421	429	568	636	656	685	694	632
Common assault	531	451	464	423	425	403	352	356	461	751	840
Robbery with aggravating circumstances	1,023	871	721	767	991	930	1,155	1,145	1,211	1,249	1122
Common robbery	148	219	262	281	317	304	379	389	471	365	332
Indecent assault	10	10	17	14	17	7	16	16	17	31	28
Kidnapping	17	12	53	34	49	78	51	22	25	20	16
Abduction	6	11	9	6	8	9	9	16	5	10	7
Neglect and ill-treatment of children	9	6	2	3	3	4	3	9	15	31	16
Culpable homicide	28	17	20	20	23	14	22	22	19	21	14
Public violence	0	1	0	2	3	0	3	3	1	5	1
Carjacking (Sub Category of Robbery Aggravating)	-	-	194	161	190	178	224	230	319	231	159
Truck hijacking (Sub Category of Robbery Aggravating)	-	-	88	113	131	64	51	23	4	6	5
Bank robbery (Sub Category of Robbery Aggravating)	-	-	3	7	4	3	3	3	0	0	0

Robbery of cash in transit (Sub Category of Robbery Aggravating)	-	-	1	1	1	1	1	2	3	0	1
House robbery (Sub Category of Robbery Aggravating)	-	-	-	-	-	-	-	-	43	65	71
Business robbery (Sub Category of Robbery Aggravating)	-	-	-	-	-	-	-	-	26	43	67
Arson	18	10	20	22	23	19	13	16	18	24	14
Malicious damage to property	477	504	436	435	430	426	431	489	466	479	476
Crimen Injuria	85	65	76	61	49	43	66	61	59	47	41
Burglary at residential premises	712	825	767	747	739	748	589	572	624	697	579
Burglary at business premises	806	499	519	555	386	486	476	500	481	520	368
Theft of motor vehicle and motorcycle	1,351	1,061	1,014	1,021	1,011	780	684	511	500	459	433
Theft out of or from motor vehicle	1,465	1,331	1,224	1,107	1,092	756	729	648	564	565	510
Stock theft	0	0	0	0	0	0	0	0	0	0	0
Illegal possession of firearms and ammunition	42	28	57	73	82	56	100	111	77	116	61
Drug related crime	79	32	87	74	73	57	89	109	69	63	60
Driving under the influence of alcohol or drugs	118	84	150	115	78	56	57	48	35	32	64
All theft not mentioned elsewhere	1,539	1,566	1,546	1,509	1,730	1,660	1,802	1,911	1,916	1,906	1688
Commercial Crime	207	172	238	254	230	368	342	296	264	254	200
Shoplifting	34	40	35	39	38	32	25	31	87	37	37
TOTAL	9,445	8,499	8,802	8,596	8,880	8,360	8,630	8,539	8,823	9,065	8,131



3. Greater Ellis Park Area Survey

Objective:

This section presents the results from a survey that was conducted on businesses operating in the Greater Ellis Park Area. The purpose of the research was to gain an understanding of perceptions of the Greater Ellis Park Area by businesses operating in the area. This was done in an effort to monitor the perceived success of the JDA's interventions in the study area.

Methodology:

The survey was conducted during April 2006. Trained students were sent out to designated areas within the Greater Ellis Park Area to administer the questionnaires. Close on 80 questionnaires were completed in this manner. The data from the surveys was then captured and analysed.

Limitations of methodology:

- Whilst every effort was made to ensure that the questionnaire was completed by the intended person (Senior Manager or Owner), in a few questionnaires it may have been completed by a less informed person.
- The respondents may not always have given the survey the necessary effort and attention that it required which may have led to some poor responses.
- Convenient sampling has some shortcomings in terms of representativity.
- The Greater Ellis Park Area was defined in this study to include Doornfontein, New Doornfontein, Troyeville, Bertrams, Lorentzville, Judith's Paarl, and Bez Valley.

3.1 Business Confidence

The first part of the questionnaire develops a business confidence index for the Greater Ellis Park Area as per the methodology that has been employed in the Johannesburg Inner City since 2002. The Greater Ellis Park Area 2006 results are compared with previous years where relevant.

The overall index score for the year 2006 in the Greater Ellis Park Area is 38.8, which is significantly down from 52.95 in 2005 and is thus the worst performing area of those surveyed this year.

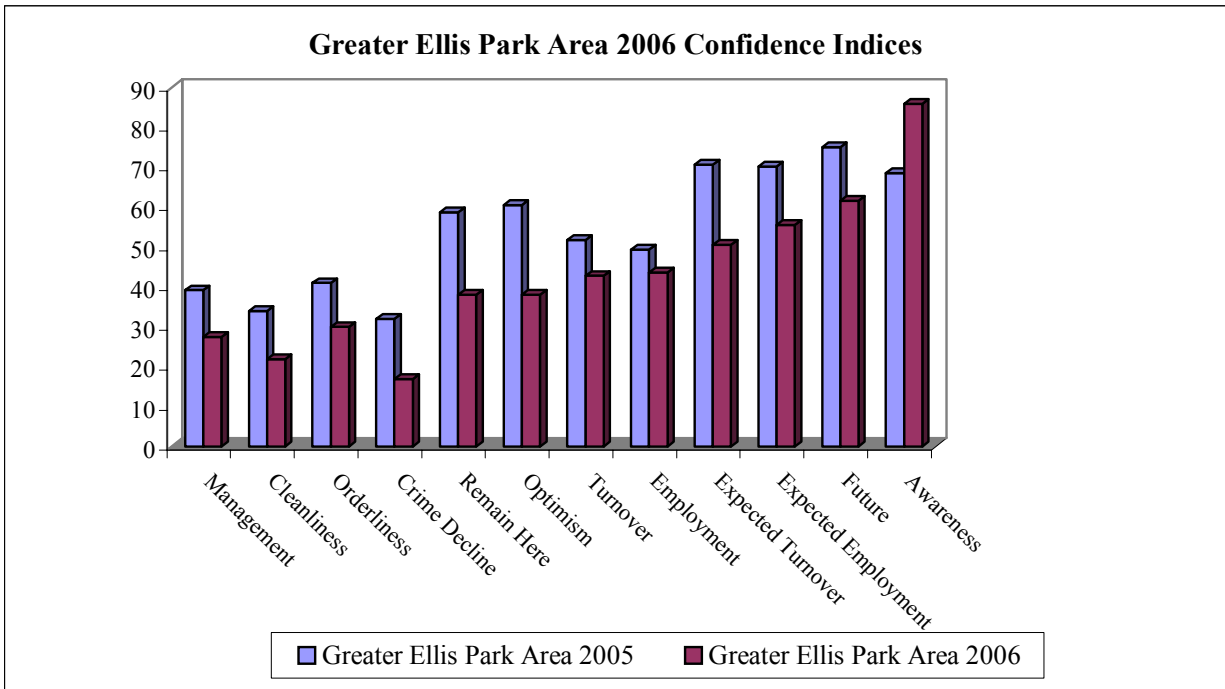
The responses to the following questions were as follows:

- Over the past year I have noticed an improvement in the management of the Greater Ellis Park Area: None agreed, 15% were neutral, 80% disagreed. It scored a 27.5 on the scale as apposed to 39.2 in 2005.
- Over the past year I have noticed an improvement in the cleanliness of the Greater Ellis Park Area: 0% agreed, 7.5% were neutral and 92.5% disagreed. It scored 21.9 (34 in 2005) on the scale.
- Over the past year I have noticed an improvement in the orderliness of the Greater Ellis Park Area: 2.5% agreed (22% in 2005), 20% were neutral and 77.5% disagreed (51% in 2005). It scored 30.
- Over the past year I have noticed a decline in the crime rate in the Greater Ellis Park Area: almost 96.2% disagreed and none agreed with this statement. It scored 16.9 on the scale – the lowest scale score for Greater Ellis Park Area. This sentiment contradicts actual police data.
- Over the past year my resolve to remain based in the Greater Ellis Park Area has risen: 7.5% agreed with this statement (43% in 2005), 38.8% were neutral and only 53.8% disagreed. It scored a 38.1 as opposed to 58.7 in 2005.
- Over the past year I have become more positive/optimistic about the Greater Ellis Park Area: almost 6.3% as opposed to 55% in 2006 agreed with this statement, 45% were neutral and only 43.8% disagreed. 38.1 (60.6 in 2005) on the scale.
- Over the past year my business turnover has risen: 28.8% disagreed, 5% agreed, and 63.8% were neutral. 42.8 on the scale (51.8 in 2005).
- Over the past year my employment levels have risen: 2.5% (22% in 2005) agreed, 63.8% were neutral and 28.8% disagreed. It scored 43.7 as apposed to 49.4 in 2005 on the scale.
- Over the coming year I expect my business turnover to rise. 26.3% of the respondents agreed and only 22.6% disagreed. It scored 50.6 on the Greater Ellis Park Area scale (70.6 in 2005).

- Over the coming year I expect to increase my employment levels: 32.6% down from 60.5% in 2005 agreed, 55% were neutral and only 13.6% disagreed with this statement. 55.6 (70.2 in 2005) on the scale.
- Over the coming year I am optimistic that things will improve (crime, grime etc) in the Greater Ellis Park Area: 50% of the respondents agreed (72% in 2005) whilst only 8.8% disagreed. It achieved the best Greater Ellis Park Area result of 61.6 down from 75 in 2005.
- Finally, we have an awareness proxy. It is made up of four questions related to the awareness of improvement districts, perceived success of these districts, and awareness of the JDA and its projects. It scored 85.9 up from 68.6 in 2005 for the Greater Ellis Park Area.

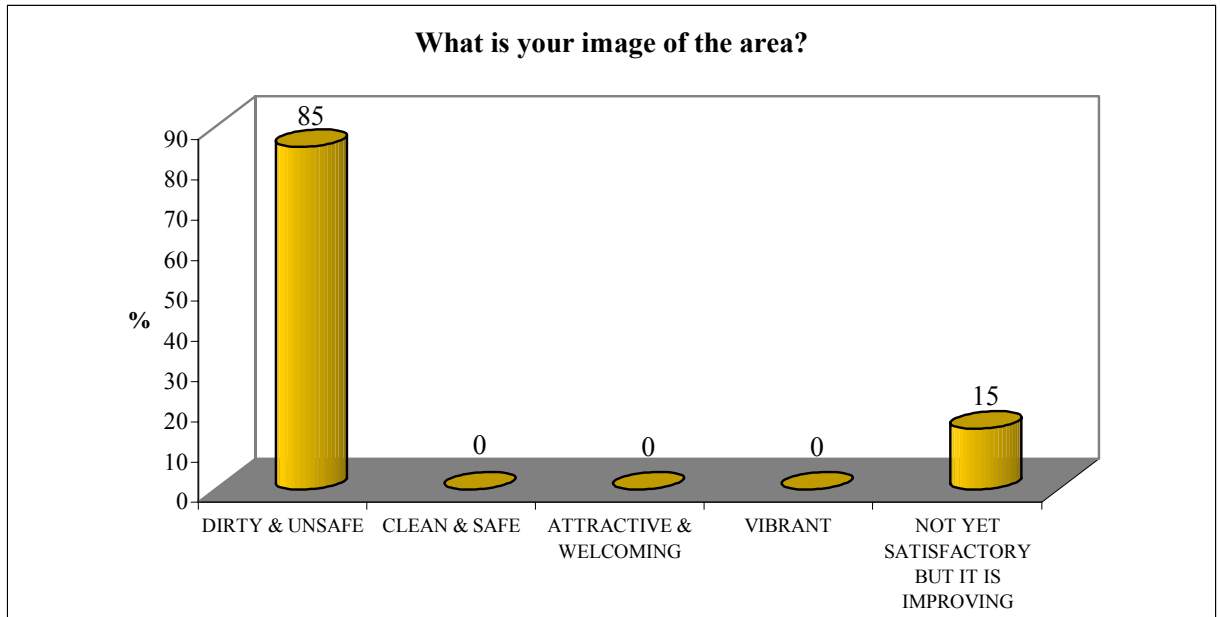
Summary of confidence indices: Ellis Park 2005

Index	Greater Ellis Park Area 2005	Greater Ellis Park Area 2006
Management	39.2	27.5
Cleanliness	34.0	21.9
Orderliness	41.0	30.0
Crime Decline	32.0	16.9
Remain Here	58.7	38.1
Optimism	60.6	38.1
Turnover	51.8	42.8
Employment	49.4	43.7
Expected Turnover	70.6	50.6
Expected Employment	70.2	55.6
Future	75.0	61.6
Awareness	68.6	85.9



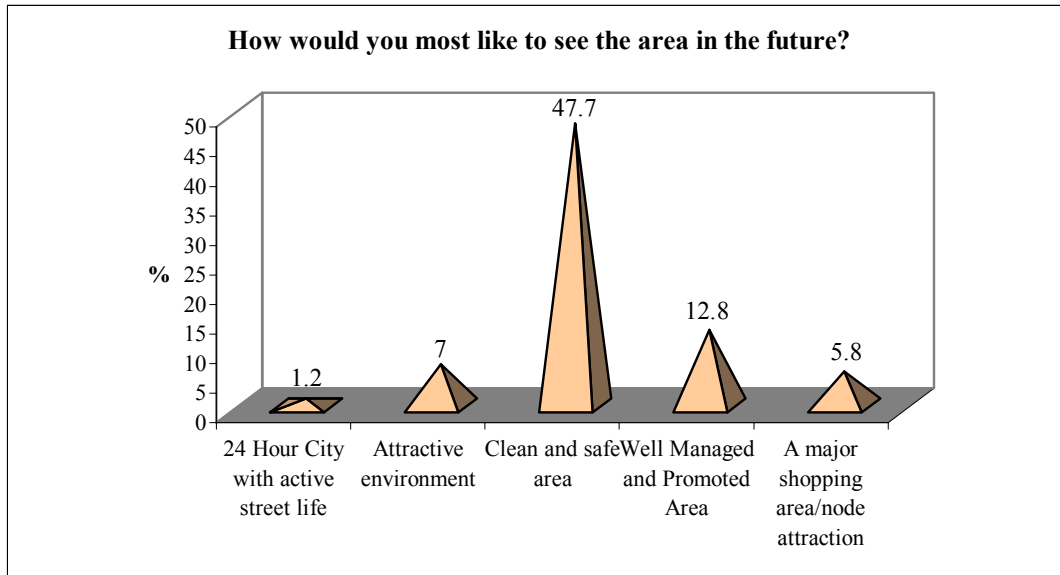
3.2 Greater Ellis Park Area Image

- 85% of respondents maintained that their image of the Greater Ellis Park Area was that it was dirty and unsafe. A further 15% argued that it was not yet satisfactory but that there were signs of improvement. No one saw it as vibrant, relatively safe and clean, or attractive and welcoming.



- Only 16% felt that there was enough entertainment in the Greater Ellis Park Area, but 51% saw signs of improvement in this regard, which is much the same as last year. When asked what sort of entertainment would improve the experience in the area, the dominant responses were: safe park for kids to play in (very prevalent), more upmarket restaurants, cinemas and video stores, entertainment targeting the youth, decent bars and clubs.
- Only 8% believe that the current variety and choice of shops is adequate in the Greater Ellis Park Area. Those that were unhappy would like to see more of the following in the area: the main responses revolved around more upmarket stores and more national chains– the respondents singled out designer clothing stores, better supermarkets (Pick n Pay, Woolworths, Shoprite), banks, car dealers, hotels, department stores (Edgars), pharmacies, fast food chains, coffee shops/restaurants etc.

- Respondent were asked how they would like to see the Greater Ellis Park Area in the future. 77.5% would like to see a clean and safe place, 13.8% as a well managed and promoted area. 3.8% would like the Ellis Park area to be a major shopping area/node.



3.3 Economic Health

- Businesses were asked which single attribute of the Greater Ellis Park Area do they feel has the most positive effect on their business and similarly draws most people to the area? The most frequent responses (similar to previous years) are listed below:
 - The sports precinct (overwhelming favourite)
 - Passing traffic
 - Diversity of shoppers and residents
 - Schools

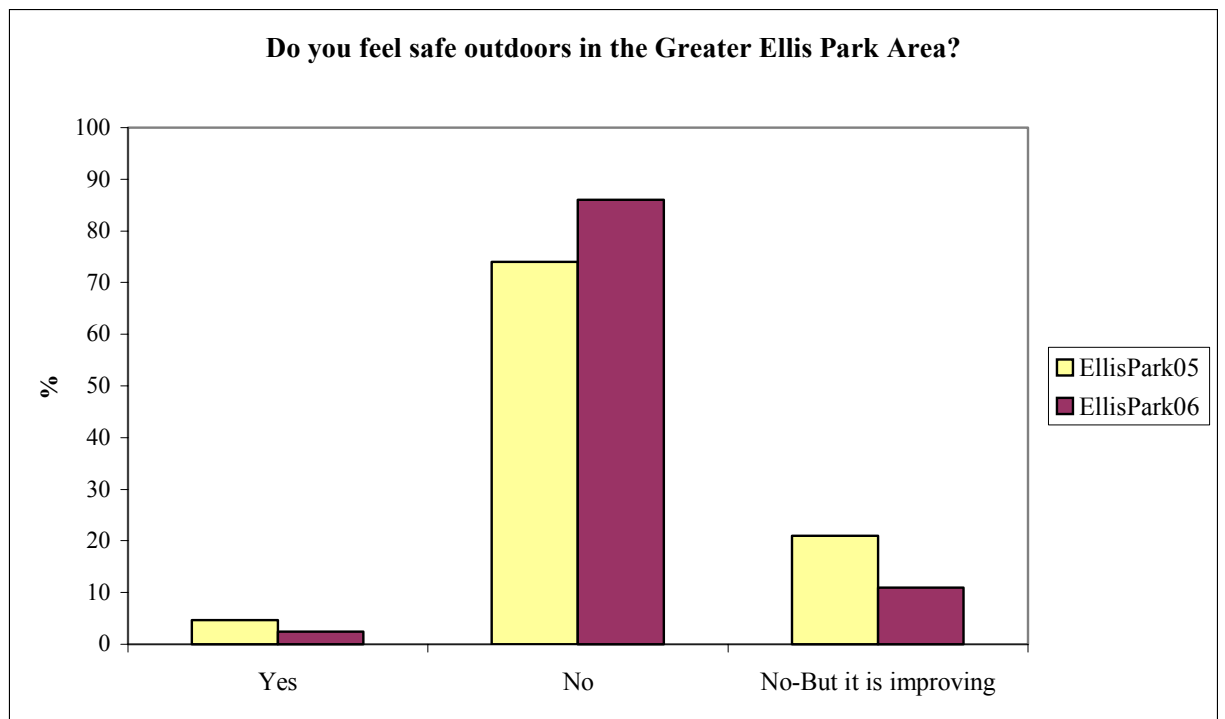
- As regards the most negative effect on their business, the following responses were forthcoming:
 - Crime and grime
 - Street vendors
 - Poor street lighting
 - Illegal occupation of buildings (very prominent)
 - Vagrants and squatters
 - Foreigners involved in illegal activities

- Respondents were asked what public sector improvements would most improve the economic health of the Greater Ellis Park Area. The responses in order of frequency were as follows:
 - Greater security presence
 - Cleaner public environment
 - Capital upgrading of existing buildings
 - Promotion and Marketing

- When asked why they were located in the area most answered that they had been there for a long time (often more than 20 years) and felt committed to the area. Convenience, location, low rental, expected improvement of area, proximity to customers and large Portuguese client base. Some claim that they stay as they own property that they cannot sell.

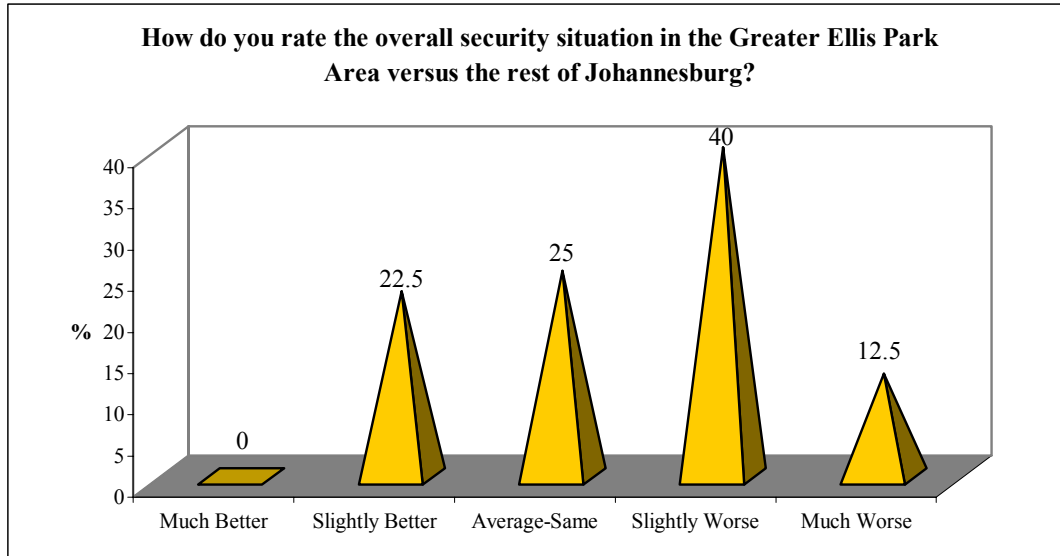
3.4 Safety and Security

- 86% of respondents do not feel safe outdoors in the Greater Ellis Park Area, whilst a further 11% do not feel safe but do believe it is improving. Only 2.5% feel safe outdoors in Greater Ellis Park Area. Interestingly this perception is not borne out by actual police data which shows a drop in crime in 2005.
- 16% do feel safe indoors in the Greater Ellis Park Area and 76% do not; the rest feel that it is improving (6.3%).



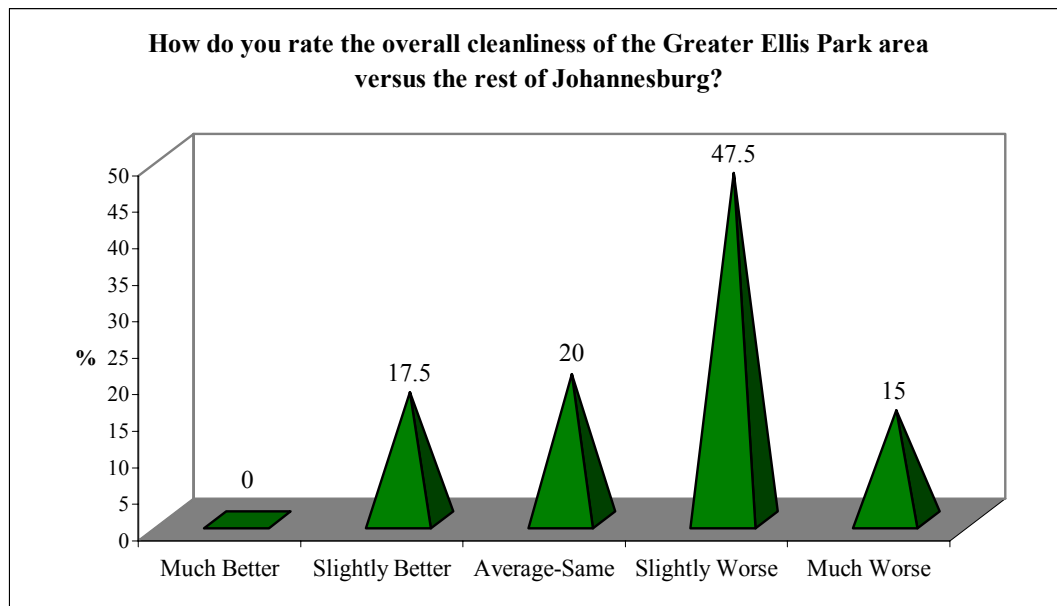
- 91% of respondents argued that crime has increased in the Greater Ellis Park Area in the past year (65% in 2005) again contradicting actual data.
- 86% of respondents stated that current policing initiatives were not effective in the Greater Ellis Park Area (36% in 2005). A further 11% felt that they were not yet effective but that there was improvement (49% in 2005).
- When asked to rate the overall security situation in the Greater Ellis Park Area versus the rest of Johannesburg, 25% felt that it was about the same (36% in 2005), 23% felt that it was better (27% in 2005) and 53% that it was worse (37% in 2005).

- When asked what it would take to make them feel safer almost all respondents maintain that they would feel safer in the Greater Ellis Park Area if there were a more visible police and organised security presence (this is consistent with last year). Calls continued for CCTV security cameras, cleaning out of overcrowded building, dealing with the drug problem, community forums and eradication of illegal businesses.



3.5 Appearance

- 85% of respondents felt that street and pavement lightening in the Greater Ellis Park Area was inadequate (73% in 2005) whilst only 12.5% felt that it was adequate (14% in 2005).
- 86% of respondents argued that litter on pavements was a major problem in the Greater Ellis Park Area (78% in 2005). Only 18% stated that illegal posters and graffiti was a problem in the area.
- 40% of respondents stated that refuse removal had improved over the past year in the area (86% in 2005). When asked to rate the overall cleanliness of the Greater Ellis Park Area versus the rest of Johannesburg, 23% of respondents felt that it was better, 25% that it was about the same and 53% that it was worse.



3.6 Informal Trading

- Only 60% of respondents supported the concept of informal trading in principle – this remains one of the lowest we have yet encountered (e.g. Randburg's support – 88.9%), with 40% not supporting the concept.
- 90% felt that the relocation of informal trading to designated areas would have a positive impact on the Greater Ellis Park Area. When asked why they felt this would have a positive impact, the reasons included:
 - Cleaner pavements and more space for pedestrian traffic
 - More control and better management
 - It would reduce crime

3.7 Marketing

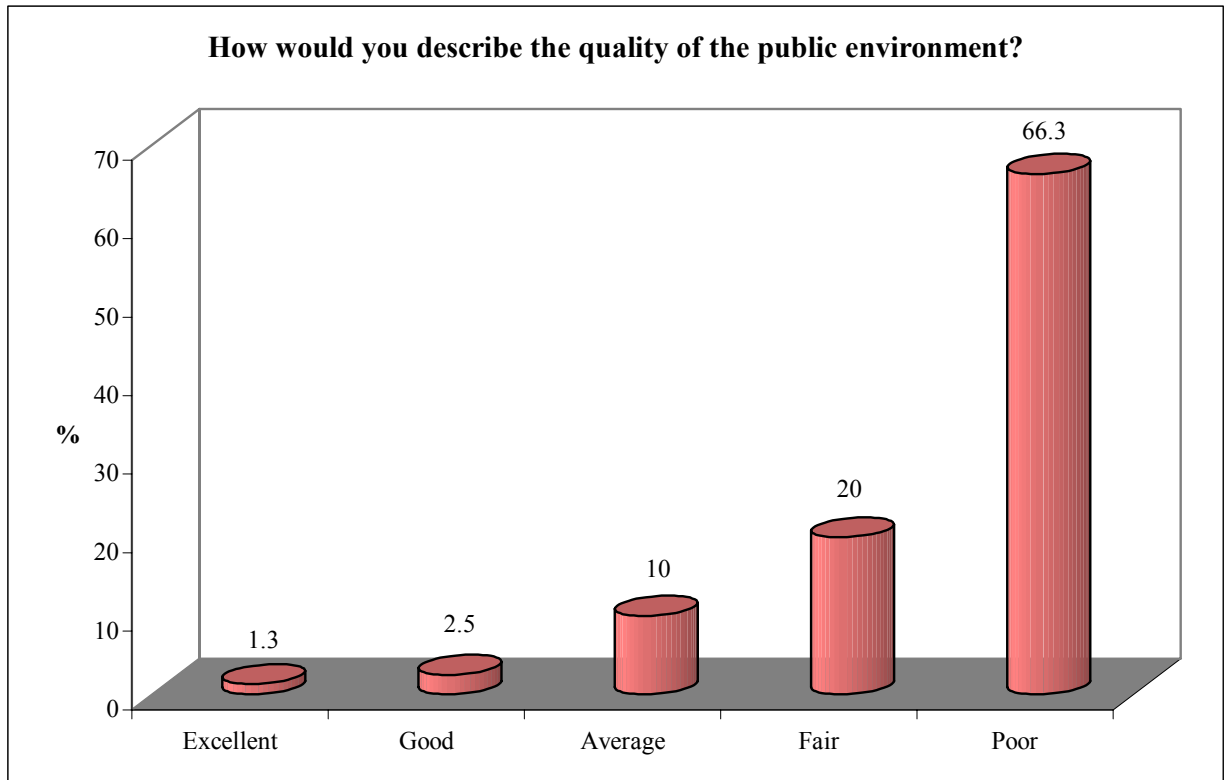
- 98% stated that it would be beneficial to have events to attract people to the area. 34% felt that these events should take place over weekends, and 26% at month end, a further 18% middle of the month, and 10% at lunch hours. These results are very close to those seen in 2005.
- 20% (73.3% in 2005) answered that the 2010 Soccer World Cup would have a positive effect on the area, 41% (26% in 2005) said they did not know and 31% (1% in 2005) answered no. Their negative results seem to be a symptom of the frustration the people are feeling that they do not experience that changes are happening quickly enough.

3.8 Transportation

- 82.5% stated that parking was a problem in the Greater Ellis Park Area compared to 17.5% stating that it was not a problem.
- 62.5% believed that the flow of traffic was a concern in the Greater Ellis Park Area.
- Perceptions of the taxi rank varied from neutral – 36%, to positive - 26%, to negative - 37%.
- 70% want the taxi rank in Greater Ellis Park Area to be relocated, with only 27% arguing for it to remain in its current location relocation. Much of the negativity seems to be centred on the taxi drivers' poor driving behaviour, illegal parking in customer and loading zone parking. Others feel the taxi rank is not close enough to their businesses.
- 26% perceived the train station positively, 46% neutrally and only 22% negatively. There is a feeling that the station needs more policing and better lighting. Some respondents complain that the station is too far from their businesses. This illustrates the importance of the public transport in bringing business
- 32% perceived the public bus system favourably, 45% felt that it was average, whilst 20% perceived it negatively.
- 34% of respondents rated the standard of road signage in the Greater Ellis Park Area as better than the rest of Johannesburg. 49% rated it as about the same, whilst 16% rated it worse.

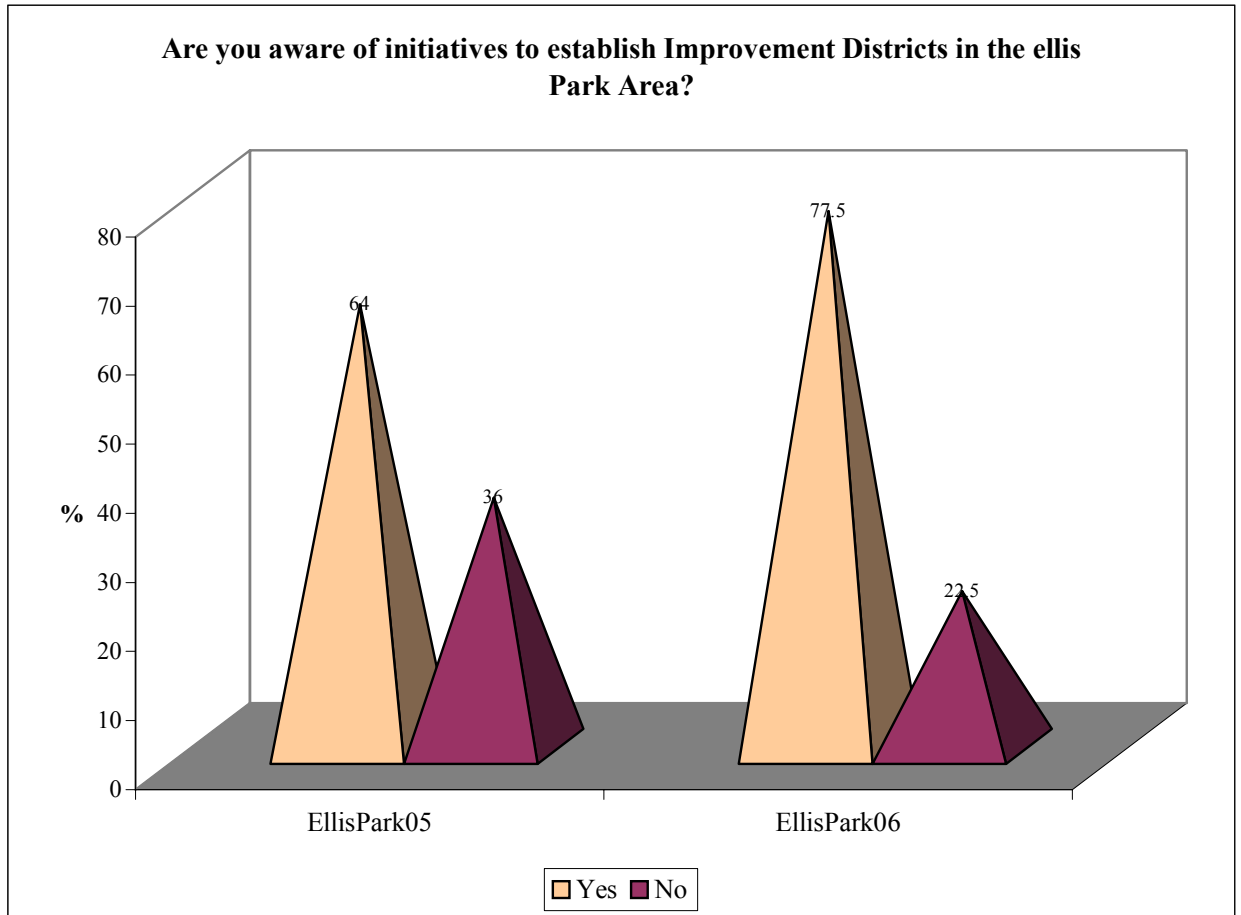
3.9 Public Environment

- 69% of the respondents felt that there were not enough public facilities in the Greater Ellis Park Area (information points, public toilets, bus shelter, public seating etc.). Only 21% stated that these facilities were adequate. Public toilets were the most frequently requested facilities by the respondents. Other requests included information points and public seating.
- Only 3.8% described the quality of the public environment in the Greater Ellis Park Area as good or excellent (the lowest of any survey), 10% as average and 86% as fair or poor. Only 6.3% argued that there were enough natural elements (such as parks, trees etc.) and the rest argued that this was inadequate.

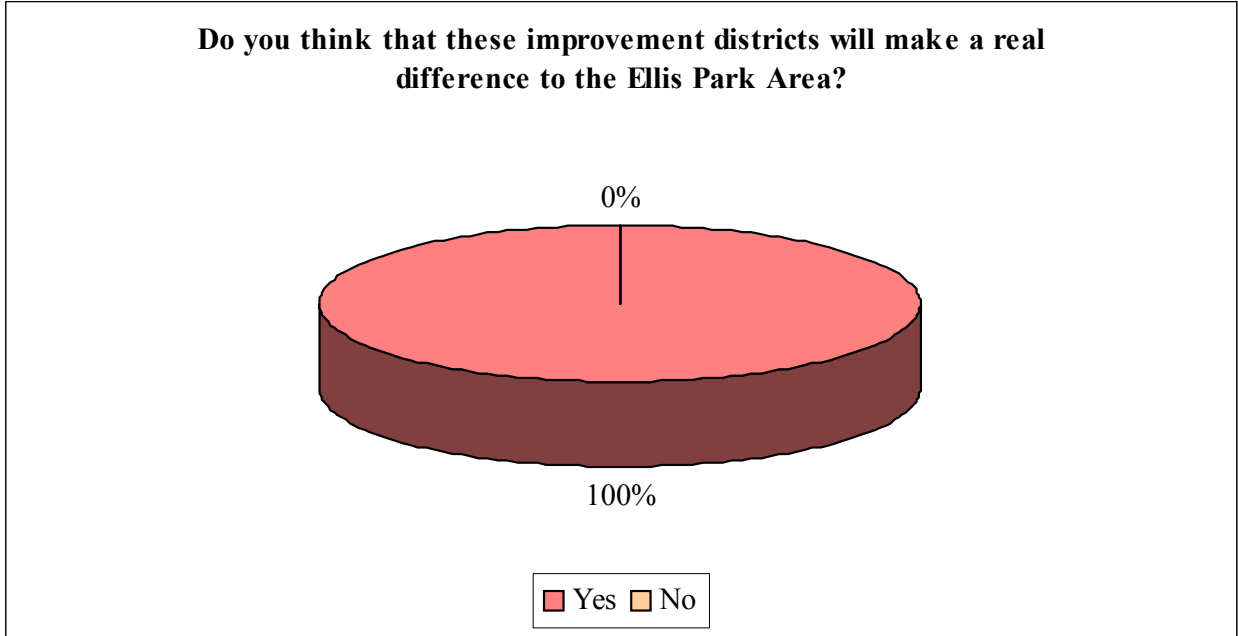


3.10 City Improvement Districts

- There is a remarkably high awareness of the initiatives to establish Improvement Districts in the Greater Ellis Park Area given the relatively early stage of the project. 78% (up from 64% in 2005) of respondents were aware of CIDS.

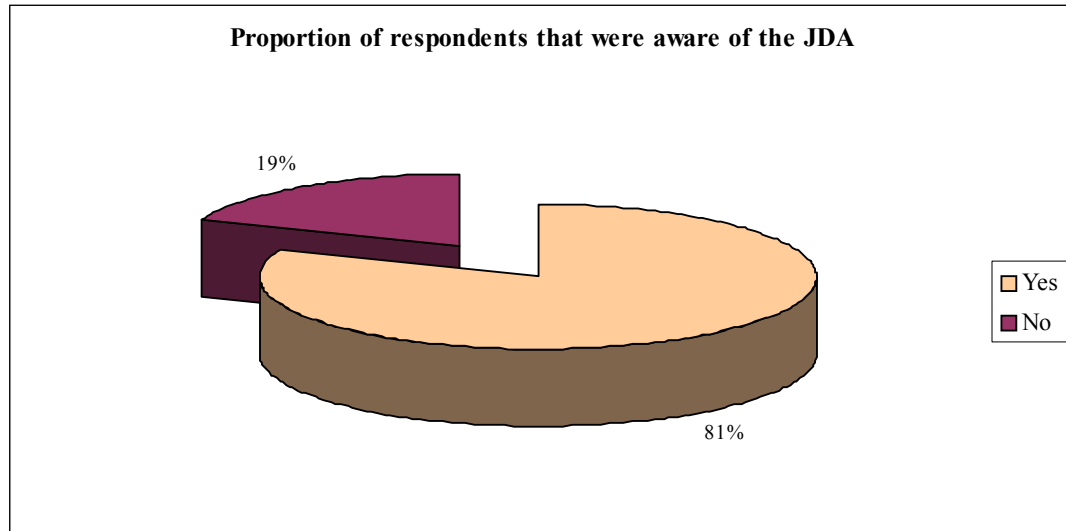


98.8% thought that these improvements districts would make a real positive difference to the Greater Ellis Park Area environment (compared 88% in 2005).



3.11 The Johannesburg Development Agency

- 82% (59% in 2005) of respondents had heard of the Johannesburg Development Agency.



- 85% (up from 60.5% in 2005) of respondents were aware of the initiatives and projects planned to improve conditions of the Greater Ellis Park Area - substantially higher than for Randburg.
- Only 6.3% had any dealings with the Johannesburg Development Agency. Those that did and were unhappy had showed the following issues of concern e.g. "Not getting feed back" or "A lot is said at meetings but nothing gets done" or " There are no follow up meetings" or "The pace is too slow".
- When asked whether they felt confident that the Johannesburg Development Agency had the capability to manage projects in the Greater Ellis Park Area, as in 2005 a healthy 88% said yes.

3.12 Conclusion of survey

Respondents were lastly asked a number of open-ended questions regarding developments in the Greater Ellis Park Area.

1. What has been the most positive development in the Greater Ellis Park Area in the past two years?
 - More events
 - Improved cleanliness and paving around Ellis Park stadium
 - Soccer matches

2. What has been the most negative development in the Greater Ellis Park Area in the past two years?
 - Crime (very prominent) and grime
 - Uncontrolled informal trading
 - Decay of buildings and illegal residence in abandoned buildings
 - Illegal immigrants

3. What does the JDA need to address most urgently in the Greater Ellis Park Area?
 - Cleaner environment
 - Reduction of crime through greater security presence of trained officers and CCTV.
 - Control informal trading
 - Upgrading of buildings
 - Control areas where Taxi's park
 - Homelessness
 - More promotions in area

It is clear that respondents are very aware of initiatives to improve conditions in the area and are very supportive of the JDA and its efforts. Crime seems to be the dominant concern of the majority of respondents and the area they would most like to see improvement. In our confidence survey, Ellis Park scored much lower than last year. There seems to be a large problem with invasion of abandoned buildings, which has led to an increase in criminal elements. On a positive note, questions about the future elicited the most positive responses – people are frustrated at the pace but believe that it will get better and that the JDA has the capacity to realize these improvements.