



Western Cape
Government



Garden Route District Municipality

2018



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Garden Route District: At a Glance

Demographics

Population Estimates, 2018; Actual households, 2016



Population

623 800



Households

189 345

Education (Garden Route and Central Karoo) 2017



Matric Pass Rate 73.4%

Learner-Teacher Ratio 42.1

Gr 12 Drop-out Rate 36.0%

Poverty 2017



Gini Coefficient 0.613

Human Development Index 0.715

Health

2017



Primary Health Care Facilities

68

Immunisation Rate

74.8%

Maternal Mortality Ratio (per 100 000 live births)

0.1

Teenage Pregnancies - Delivery rate to women U/18

15.0%

Safety and Security

Actual number of reported cases in 2018



Residential Burglaries

5 208

DUI

1 739

Drug-related Crimes

10 809

Murder

183

Sexual Offences

1 046

Access to Basic Service Delivery

Percentage of households with access to basic services, 2016



Water

96.9%

Refuse Removal

88.8%



Electricity

94.3%



Sanitation

96.1%



Housing

85.7%



Road Safety 2017

2017

Fatal Crashes 111

Road User Fatalities 132

Labour 2017

2017

Unemployment Rate

17.0%



Socio-economic Risks

Risk 1 Slow Economic Growth

Risk 2 Increasing Population & Demand for Services

Risk 3 Rising Unemployment

Largest 3 Sectors

Contribution to GDP, 2016

Finance, insurance, real estate and business services

24.9%

Wholesale and retail trade, catering and accommodation

17.9%

Manufacturing

14.5%

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DEMOGRAPHICS

It is of critical importance for public policy decision makers across all spheres of government to acknowledge demographics as a decisive factor in shaping our current socio-economic reality.

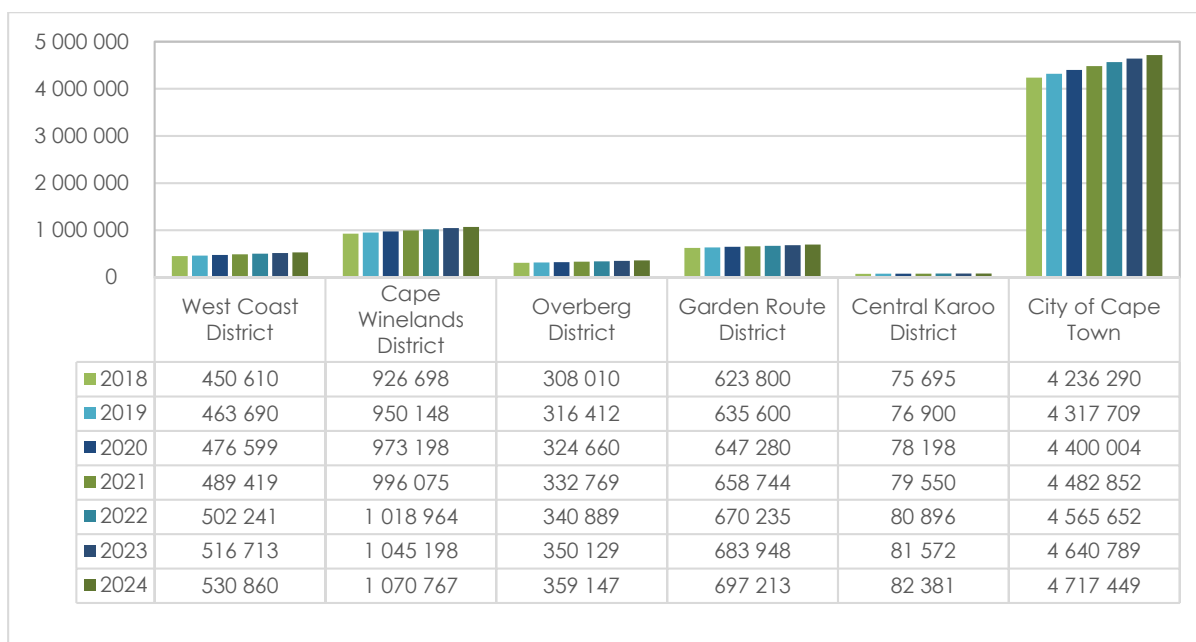
This chapter provides a concise yet meaningful overview of key demographic variables that will assist with municipal planning and budgeting, namely estimates of population size, the distribution of population projections within age cohorts as well as dependency ratios.

The demographic data provided in this Chapter was sourced from the Department of Social Development who used Stats SA's 2018 Mid-Year Population Estimates (2002 – 2018) to project population growth for the period 2019 to 2024.

Data source: Department of Social Development, 2018



POPULATION



According to the Department of Social Development's 2018 projections, the Garden Route District Municipality currently has a population of 623 800, rendering it the second largest district population outside of the metro. This total is estimated to increase to 697 213 by 2024 which equates to 1.9 per cent average annual growth over this period. The growth of Garden Route District for the 2018 to 2024 period is just below that of the Province's 2.0 per cent.

AGE COHORTS

Year	Children: 0 – 14 Years	Working Age: 15 – 64 Years	Aged: 65 +	Dependency Ratio
2011	148 463	380 945	44 858	50.7
2019	155 530	407 054	73 017	56.1
2024	163 033	443 366	90 814	57.3

The above table depicts the Garden Route District's population composition per age cohorts. These groupings are also expressed as a dependency ratio which in turn indicates who are part of the workforce (age 15 - 64) and those, who are depending on them (children and seniors). A higher dependency ratio means greater pressure on a smaller productive population and higher pressure on social systems.

A comparison between the 2011 and 2019 estimate shows a considerable increase in the dependency ratio from 50.7 in 2011 to 56.1 in 2019; this is projected to increase even further to 57.3 in 2024.

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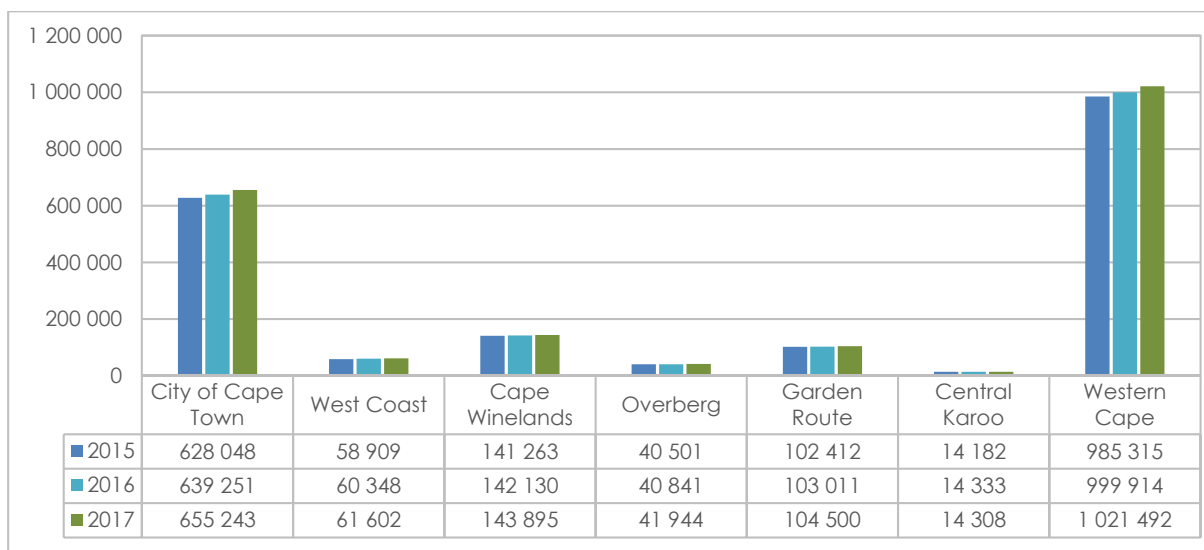
EDUCATION

Education and training improves access to employment opportunities and helps to sustain and accelerate overall development. It expands the range of options available from which a person can choose to create opportunities for a fulfilling life. Through indirect positive effects on health and life expectancy, the level of education of a population also influences its welfare.

Data source: Western Cape Education Department, 2018

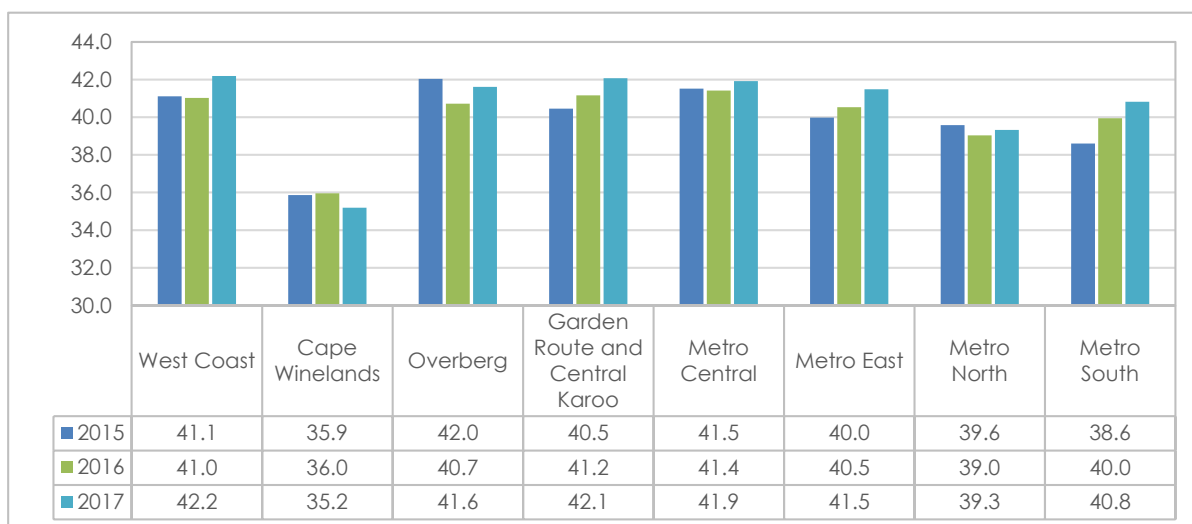


LEARNER ENROLMENT



Learner enrolment in Garden Route District grew from 102 412 in 2015 to 103 011 in 2016 and increased further to 104 500 learners in 2017. This could be attributed to a number of factors including demographics and socio-economic context.

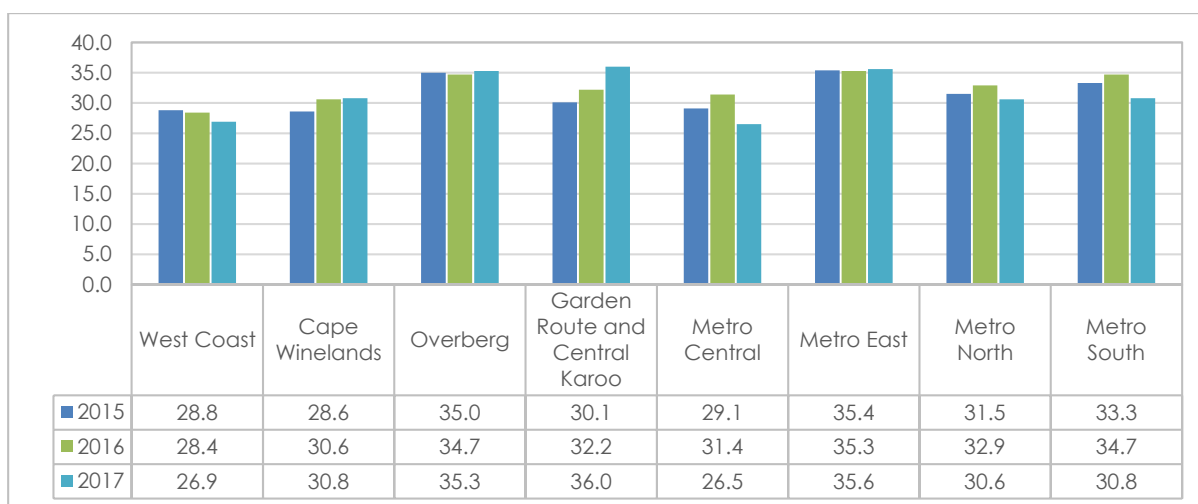
LEARNER-TEACHER RATIO



Changes in the learner teacher ratio can affect learner performance. The learner-teacher ratio in the Garden Route and Central Karoo Education District increased from 40.5 in 2015 to 41.2 in 2016 and 42.1 in 2017. Factors influencing the learner-teacher ratio include the ability of schools to employ more educators when needed and the ability to collect fees.

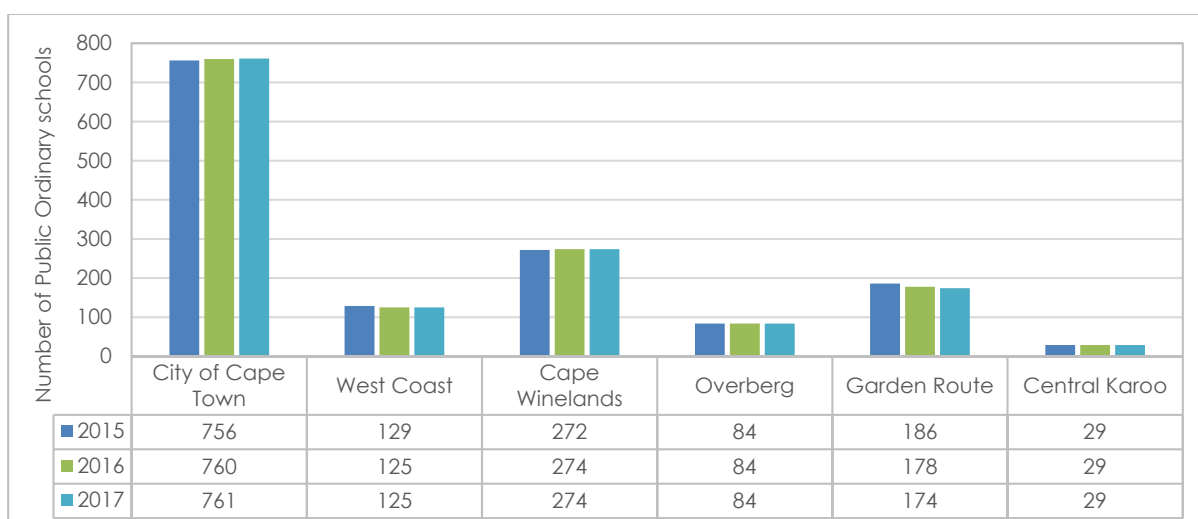
GRADE 12 DROP-OUT RATES (%)

The grade 12 drop-out rate for learners within the Garden Route and Central Karoo Education District worsened from 30.1 per cent in 2015 to 32.2 per cent in 2016 and further to 36.0 per cent in 2017. The grade 12 drop-out rate for learners within the Garden Route District in 2017 was highest in Bitou, at 44.5 per cent which had shown a sharp increase in comparison with the 26.9 per cent in 2015 and 25.9 per cent in 2016 of the previous years. The lowest 2017 rate was within the George area, decreasing from 31.8 per cent in 2015 down to 31.2 per cent in 2017. Drop-outs are influenced by a wide array of socio-economic factors including unemployment, poverty and teenage pregnancies.



EDUCATIONAL FACILITIES

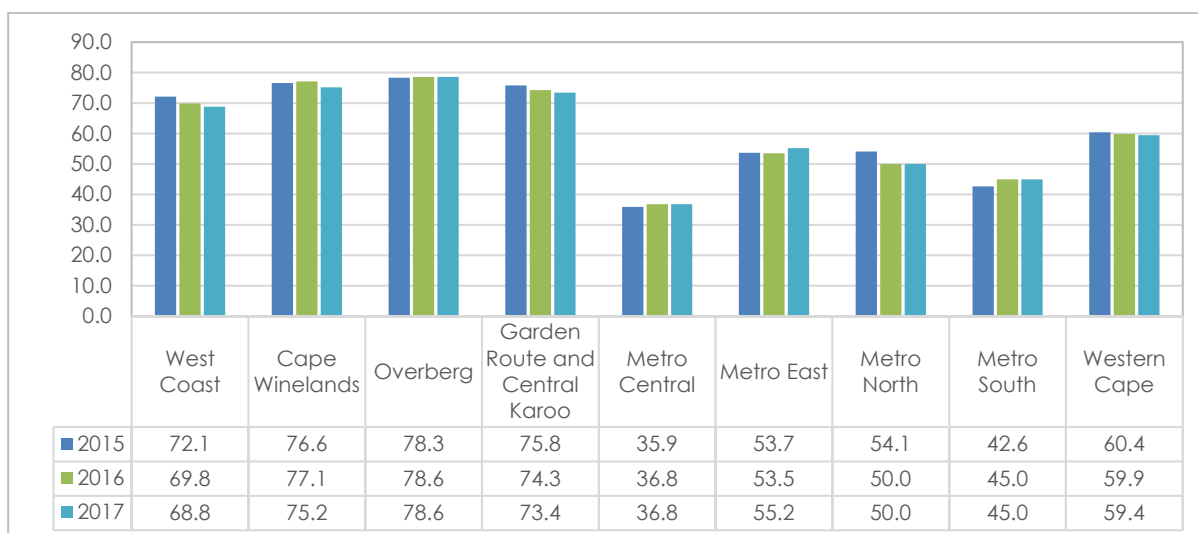
The availability of adequate education facilities such as schools, FET colleges and schools equipped with libraries and media centres could affect academic outcomes positively.



In 2015, the Garden Route area had a total of 186 public ordinary schools decreasing to 178 in 2016 and to 174 in 2017. Within the tough economic climate, schools in general have been reporting an increase in parents being unable to pay their school fees.

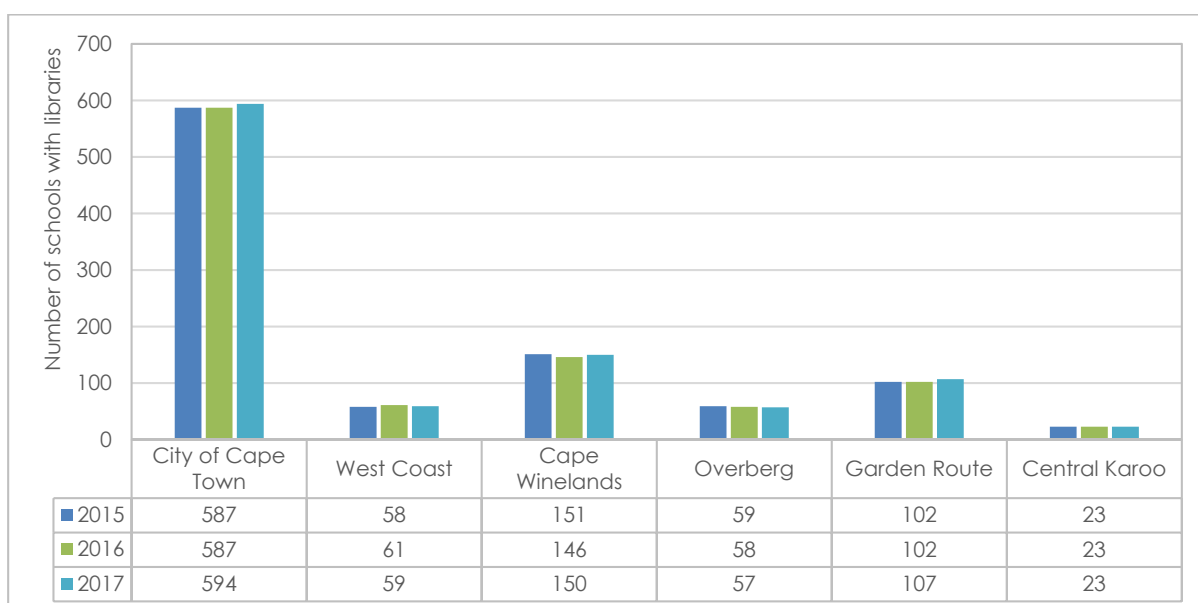
NO-FEE SCHOOLS

The proportion of no-fee schools across within the Province has decreased marginally between 2015 and 2017; declining from 60.4 per cent in 2015 to 59.9 per cent in 2016, and further to 59.4 per cent in 2017. The combined Garden Route – Central Karoo Education District followed the same trend with a decline across the period, from 75.8 per cent in 2015 to 74.3 per cent in 2016. In 2017, 73.4 per cent of the schools within the Garden Route - Central Karoo Education District were no fee schools.



SCHOOLS WITH LIBRARIES

The number of schools equipped with libraries increased from 102 in 2015 and 2016 to 107 in 2017.



EDUCATION OUTCOMES



Education remains one of the key avenues through which the state is linked to the economy. In preparing individuals for future engagements in the broader market, policy decisions and choices in the sphere of education play a critical role in determining the extent to which future economy and poverty reduction plans can be realised. This section measures the matric pass rate within the Garden Rout District municipal area.

Area	2015	2016	2017
Cape Winelands	83.6	84.7	82.3
Garden Route and Central Karoo	85.2	84.8	81.7
Metro Central	86.6	87.3	82.4
Metro East	80.0	82.3	77.2
Metro North	84.0	88.0	85.2
Metro South	84.2	84.8	82.2
Overberg	89.6	92.6	87.6
West Coast	88.9	87.5	85.9
Western Cape	84.3	85.6	82.1

The matric pass rate in the Garden Route – Central Karoo Education District declined from 85.2 per cent in 2015 to 84.8 per cent in 2016, before falling to a low of 81.7 per cent in 2017. In 2017, the Garden Route – Central Karoo was only slightly better than that of the Province's matric pass rate of 82.1 per cent. Better results could improve access for learners to higher education to broaden their opportunities.

3

HEALTH

Health is another major factor contributing to the general quality of life in the Garden Route municipal area. It is therefore important to monitor the public health facilities as well as a variety of factors such as Human Immunodeficiency Virus (HIV)/Acquired Immunodeficiency Syndrome (AIDS) or Tuberculosis (TB) and general topics that affect the community, like maternal health. This Socio-economic Profile provides the basic statistics concerning these issues. Since this profile focusses on the public health facilities, private facilities are not included.

Data source: Department of Health, 2018



HEALTHCARE FACILITIES

All citizens' right to access to healthcare services are directly affected by the number and spread of facilities within their geographical reach. South Africa's healthcare system is geared in such a way that people have to move from first access to primary health care services, with a referral system, to secondary and tertiary levels.

Area	PHC Clinics		Community Health Centres	Community Day Centres	Hospitals		Treatment Sites	
	Fixed	Non-fixed			District	Regional	ART Clinics	TB Clinics
Garden Route District	35	33	0	6	6	1	61	88
Western Cape	195	157	10	63	34	5	298	456

In terms of healthcare facilities, in 2017/18, the Garden Route District area had 35 fixed clinics and 33 mobile primary healthcare clinics. In addition, there was also 6 community day centres, 6 district hospitals and one regional hospital, as well as 61 ART and 88 TB treatment clinics/sites.

In terms of changes when compared with the previous year, there were two less mobile/satellite clinics, 4 less ART clinic/treatment site and one additional TB treatment clinics/sites than in 2016/17.

EMERGENCY MEDICAL SERVICES



Access to emergency medical services is critical for rural citizens due to rural distances between towns and health facilities being much greater than in the urban areas. Combined with the relatively lower population per square kilometre in rural areas, ambulance coverage is greater in rural areas in order to maintain adequate coverage for rural communities.

Provision of more operational ambulances can provide greater coverage of emergency medical services. The Garden Route District had 2.1 ambulances per 10 000 inhabitants in 2017 which is below the Province's average of 2.6 ambulances per 10 000 people. It is worth noting that this number only refers to Provincial ambulances and excludes all private service providers.

HIV/AIDS

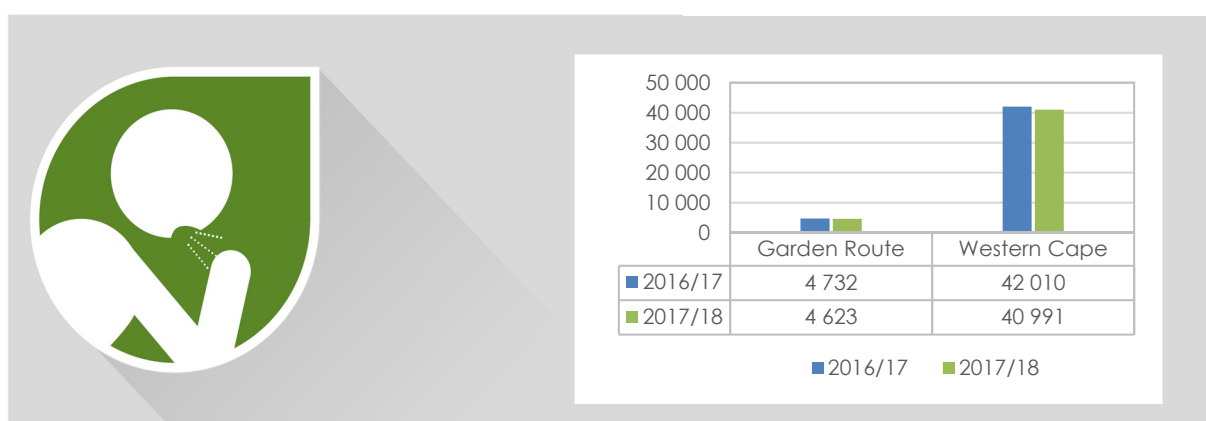
HIV/AIDS management is crucial given its implications for the labour force and the demand for healthcare services.

Area	Registered patients receiving ART		Number of new ART patients		HIV Transmission Rate	
	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18
Garden Route District	20 127	21 713	3 603	3 537	1.4	1.3
Western Cape	230 931	256 821	44 869	45 491	0.9	0.8

The Garden Route District area's total registered patients receiving ARTs has been steadily rising. Patients receiving antiretroviral treatment increased by 1 586 between 2016/17 to 2017/18. The 21 713 patients receiving antiretroviral treatment are treated at 61 clinics/ treatment sites. A total of 256 821 registered patients received antiretroviral treatment in Western Cape in 2017/18. The Garden Route District, with 21 713 patients represent 8.5 per cent of the patients receiving ART in the Province.

The number of new antiretroviral patients decreased to 3 537 in 2017/18 from 3 603 in 2016/17. HIV transmission rate for the Garden Route District showed a slight improvement from 1.4 per cent in 2016/17 to 1.3 per cent in 2017/18; similarly, the Province showed a marginal improvement to 0.8 per cent in 2017/18.

TUBERCULOSIS (TB)



In contrast to the rising numbers of HIV/AIDS cases, the Garden Route District experienced a decline in tuberculosis (TB) cases in 2017/18. The Garden Route, with 4 623 TB patients in 2017/18 compared to 4 732 in 2016/17 represents 11.3 per cent of the TB patients who are treated in the treatment sites in the Province. The Garden Route's TB patients are treated at 88 TB clinics or treatment sites.

CHILD HEALTH

The United Nations Sustainable Development Goals aims by 2030 to end preventable deaths of new-borns and children under 5 years of age, with all countries aiming to reduce neonatal mortality to at least as low as 12 per 1,000 live births and under-5 mortality to at least as low as 25 per 1,000 live births (Source: UN SDG's).

Area	Immunisation Rate		Malnutrition		Neonatal Mortality Rate		Low birth weight	
	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18
Garden Route District	77.0	74.8	3.2	2.7	8.5	11.4	14.6	17.8
Western Cape	75.1	81.2	2.2	1.9	8.5	9.3	14.3	14.6

The immunisation rate in the Garden Route District area has declined from 77.0 per cent in 2016/17 to 74.8 per cent in 2017/18.

The number of malnourished children under five years in the Garden Route District in 2016/17 was 3.2 per 100 000 people, decreasing to 2.7 per 100 000 people in 2017/18. At 2.7, the Garden Route District rate is better than the Province's 1.9 per 100 000.

Neonatal mortality rate (NMR) in the Garden Route area has deteriorated from 8.5 per 1 000 live births in 2016/17 to 11.4 per 1 000 live births in 2017/18. A rise in the NMR may indicate deterioration in new-born health outcomes, or it may indicate an improvement in the reporting of neonatal deaths.

The low birth weight indicator for the Garden Route District area has deteriorated between 2016/17 (14.6) and 2017/18 (17.8).

DEFINITIONS

Immunisation: *The immunisation rate is calculated as the number of children immunised as a percentage of the total number of children less than one year of age. Immunisation protects both adults and children against preventable infectious diseases. Low immunisation rates speak to the need for parents to understand the critical importance of immunisation, as well as the need to encourage parents to have their young children immunised.*

Malnutrition: *Expressed as the number of malnourished children under five years per 100 000 people. Malnutrition (either under- or over-nutrition) refers to the condition whereby an individual does not receive adequate amounts or receives excessive amounts of nutrients.*

Neonatal mortality rate: *Measured as the number of neonates dying before reaching 28 days of age, per 1 000 live births in a given year. The first 28 days of life (neonatal period) represent the most vulnerable time for a child's survival. The Province's target for 2019 is 6.0 per 1 000 live births.*

Low birth weight: *Percentage of all babies born in facility that weighed less than 2 500 g. Low birth weight is associated with a range of both short- and long-term consequences.*

MATERNAL HEALTH

Area	Maternal Mortality Rate		Delivery Rate to Women under 20 years		Termination of Pregnancy Rate	
	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18
Garden Route District	0.0	0.1	6.7	15.0	0.5	0.6
Western Cape	0.1	0.1	5.7	11.2	1.1	1.2

The maternal mortality rate in the Garden Route District increased slightly from zero in 2016/17 to 0.1 in 2017/18; the Provincial rate remained at 0.1 in 2016/17 and 2017/18.

The Garden Route District's delivery rate to women under 20 years has deteriorated from 6.7 per cent in 2016/17 to 15.0 per cent in 2017/18; the Province's rate has deteriorated from 5.7 per cent in 2016/17 to 11.2 per cent in 2017/18. This is of concern as these are teenagers who are of school going age and could lead to high dropout rates at schools in the Garden Route District and the Province.

The termination of pregnancy rate for the Garden Route District and the Province increased slightly between 2016/17 and 2017/18; the District's rate increasing from 0.5 per cent to 0.6 per cent and the Province's rate increasing from 1.1 per cent to 1.2 per cent between 2016/17 and 2017/18.

DEFINITIONS

Maternal mortality rate: *Maternal deaths per 100 000 live births in health facilities. Maternal death is death occurring during pregnancy, childbirth and the puerperium of a woman while pregnant or within 42 days of termination of pregnancy, irrespective of the duration and site of pregnancy and irrespective of the cause of death (obstetric and non-obstetric).*

Births to teenage mothers: *Deliveries to women under the age of 20 years as proportion of total deliveries in health facilities. Teenage pregnancy is almost always unplanned; as a result, when young parents are placed in a position to care for their children, life can become particularly tough, especially if they do not have family or social support.*

Termination of pregnancy: *The percentage of terminations as a proportion of the female population aged 15 to 44 years. Government hospitals, designated private doctors and gynaecologists, and non-profit providers offer safe and legal termination of pregnancy. To have a free abortion, the request must be made at a primary healthcare clinic, where the pregnancy will be confirmed, counselling provided, an appointment made, and a referral letter be given to a facility where the procedure can be performed.*

4

POVERTY

This section outlines living conditions and economic circumstances of households in the Garden Route District area based on most recent data including Global Insight and Quantec. Economic theory suggests that when an economy prospers its households are expected to enjoy an improved standard of living. On the contrary, a declining economy tends to lower the standards of living of people. This section uses indicators such as GDP per capita, income inequality and human development to show the current reality of households residing in the Garden Route District area.

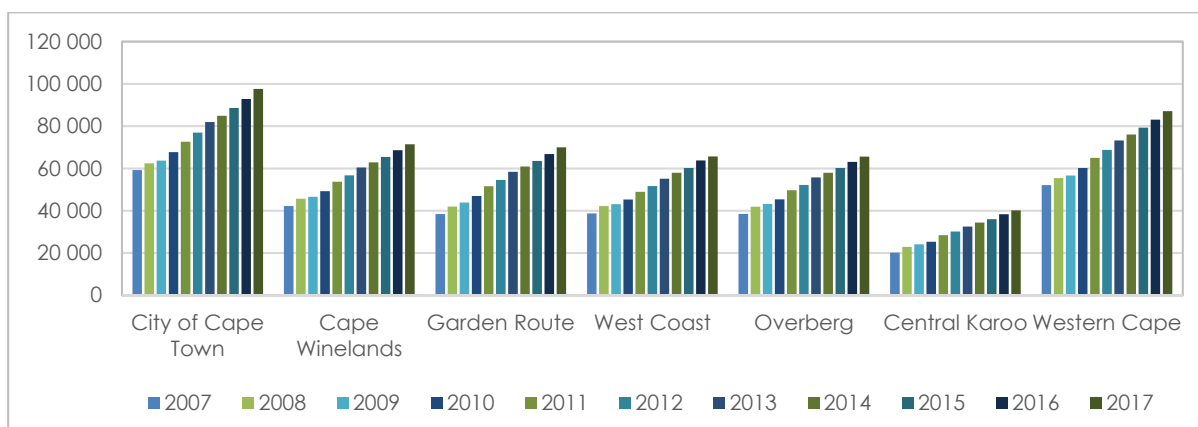
The deteriorating financial health of households and individuals under the weight of economic pressures, specifically between 2011 and 2015, has resulted in an increase in the poverty levels, according to the Poverty Trends in South Africa report released by Statistics South Africa in 2017. The report cites rising unemployment levels, low commodity prices, higher consumer prices, lower investment levels, household dependency on credit, and policy uncertainty as the key contributors to the economic decline in recent times. These recent findings indicate that the country will have to reduce poverty at a faster rate than previously planned.

According to the report the categories of people vulnerable to poverty remained to be African females, children 17 years and younger, people from rural areas, and those with no education. Inflation-adjusted poverty lines show that the food poverty line increased from R219 in 2006 to R531 per person per month in 2017. The lower-bound poverty line has increased from R370 in 2006 to R758 per person per month in 2017 while the upper-bound poverty line has increased from R575 in 2006 to R1 138 per person per month in 2017.



GDPR PER CAPITA

An increase in real GDP per capita, i.e. GDP per person, is experienced only if the real economic growth rate exceeds the population growth rate. Even though real GDP per capita reflects changes in the overall well-being of the population, not everyone within an economy will earn the same amount of money as estimated by the real GDP per capita indicator.

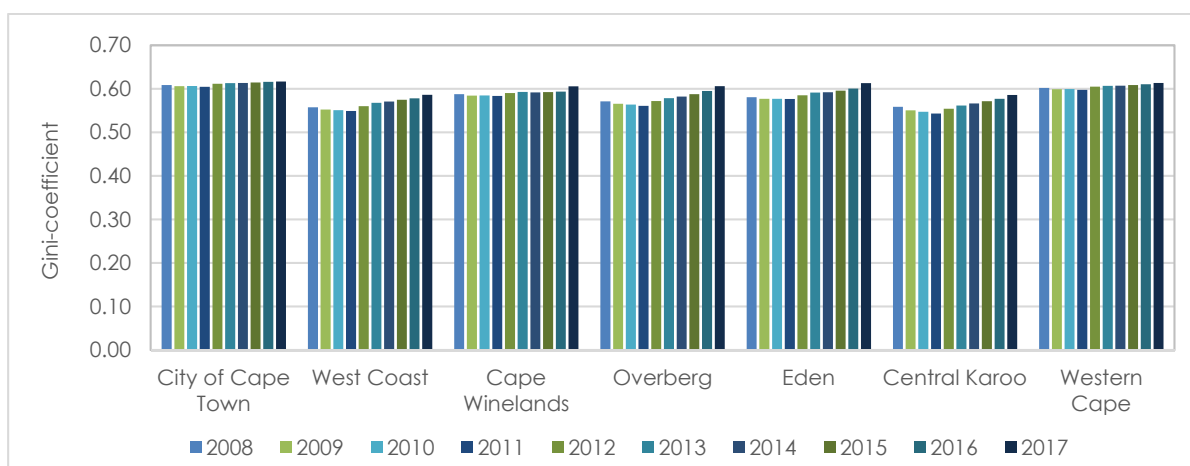


Source: Stats SA 2017, own calculations

In 2017, the City of Cape Town (R97 684) had the highest GDP per capita in the Province, followed by the Cape Winelands (R71 426) and Garden Route Districts (R69 970). All the Districts' GDP per capita was below that of the Western Cape's figure of R87 110.

INCOME INEQUALITY

The National Development Plan has set a target of reducing income inequality in South Africa from a Gini coefficient of 0.7 in 2010 to 0.6 by 2030.

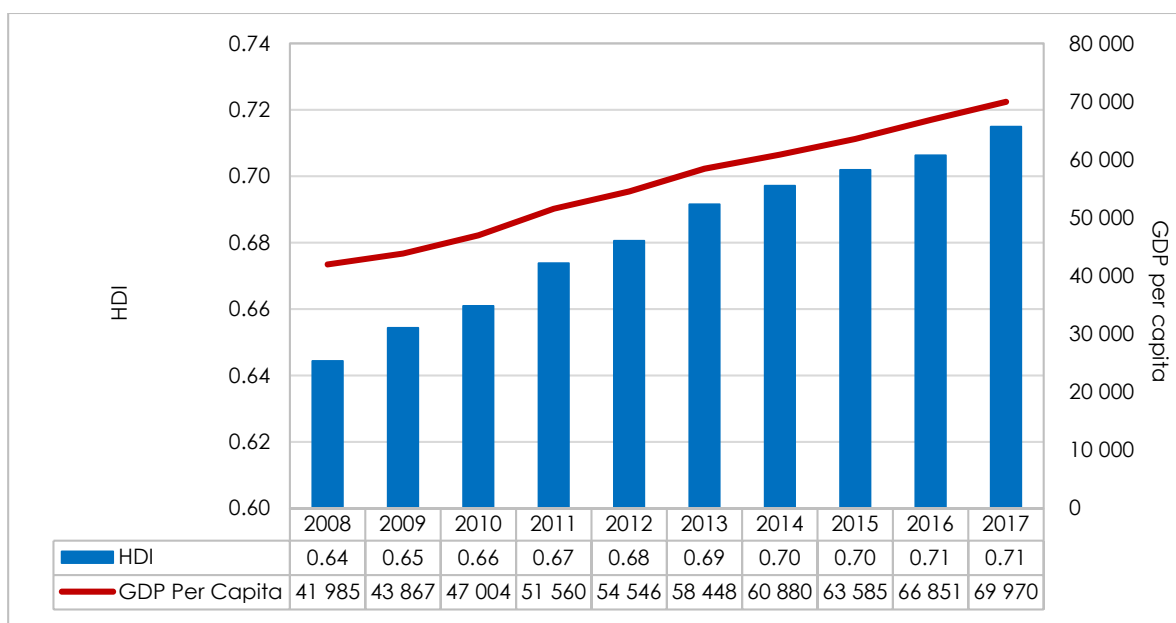


Source: Global Insight, 2017

Although income inequality in the Garden Route District municipal area has generally declined between 2008 and 2011, it has increased since then, reaching 0.613 in 2017. It has from 2015 onward moved beyond the NDP's 0.6 target and the increasing trend could see it moving further beyond this level. Income inequality levels in the Garden Route District were the same as in the Province (0.613).

HUMAN DEVELOPMENT

The United Nations uses the Human Development Index (HDI)¹ to assess the relative level of socio-economic development in countries. Indicators used to measure human development include education, housing, access to basic services and health indicators. Per capita income is the average income per person of the population per year; per capita income does not represent individual income within the population. The life expectancy and infant mortality rates are other important criteria for measuring development.



Source: Global Insight, 2017

There has been a general increase in the HDI of Garden Route District as well as for the Western Cape between since 2008, with the index reaching 0.715 for the District and 0.733 in the Province. Naturally, per capita income as per definition is expected to mimic the trend of HDI and this is clearly displayed in the graphic above.

¹ The HDI is a composite indicator reflecting education levels, health, and income. It is a measure of peoples' ability to live a long and healthy life, to communicate, participate in the community and to have sufficient means to be able to afford a decent living. The HDI is represented by a number between 0 and 1, where 1 indicates a high level of human development and 0 represents no human development.

5

BASIC SERVICE DELIVERY

The Constitution of the Republic of South Africa states that every citizen has the right to access to adequate housing and that the state must take reasonable legislative and other measures within its available resources to achieve the progressive realisation of this right. Access to housing also includes access to services such as potable water, basic sanitation, safe energy sources and refuse removal services, to ensure that households enjoy a decent standard of living.

This section reflects on housing and basic services access levels (Census 2011) and the incremental progress municipalities have made hereto within the last 5 years (Community Survey 2016).



ACCESS TO SERVICES & HOUSING

Since no new household survey information is available (compared to SEPLG 2017), this section highlights housing and household services access levels from the most recent available information from Statistics South Africa's Community Survey 2016. The next household survey which includes municipal level access to household services will be the Census in 2021.

The table below indicates access to housing and services in the Garden Route District area. With a total of 189 345 households, 85.7 per cent have access to formal housing.

Community Survey 2016	City of Cape Town	West Coast District	Cape Winelands District	Overberg District	Garden Route District	Central Karoo District	Western Cape
Total number of households	1 264 849	129 862	236 006	91 835	189 345	21 980	1 933 876
Formal main dwelling	1 032 497	111 389	191 077	75 105	162 325	21 498	1 593 891
	81.6%	85.8%	81.0%	81.8%	85.7%	97.8%	82.4%
Water (piped inside dwelling/ within 200m)	1 261 875	125 336	232 605	89 905	183 441	20 893	1 914 055
	99.8%	96.5%	98.6%	97.9%	96.9%	95.1%	99.0%
Electricity (primary source of lighting)	1 193 110	120 155	228 650	87 910	178 646	21 345	1 829 816
	94.3%	92.5%	96.9%	95.7%	94.3%	97.1%	94.6%
Sanitation (flush/ chemical toilet)	1 236 000	122 205	218 483	86 890	181 973	20 979	1 866 531
	97.7%	94.1%	92.6%	94.6%	96.1%	95.4%	96.5%
Refuse removal (at least weekly)	1 110 231	108 311	192 974	79 961	168 079	19 964	1 679 520
	87.8%	83.4%	81.8%	87.1%	88.8%	90.8%	86.8%

Access to water, electricity and sanitation services were however higher than this at 96.9 per cent, 94.3 per cent and 96.1 per cent respectively while household access to refuse removal services was at 88.8 per cent. These figures are generally on par or above that of the Western Cape Province.

SERVICES GROWTH

A key element to the sustainable management of services is accurate and reliable information on the demand for services to enable informed projections on future demand. This section reflects on services growth based on information from Statistics South Africa's Non-Financial Survey of Municipalities. The unit of measure is a consumer/billing unit which is not comparable to household level information. Services provided by municipalities are done per 'plot' or consumer/billing unit, however, since households are the unit of measurement more often used in demographic surveys, an understanding of household dynamics remains important.

A comparison is made between 2007 and 2017 to determine services growth per consumer/billing unit over the past 10 years. This growth is contrasted against growth in support for indigent households, for which municipalities do not receive services revenue. An understanding of these trends will allow for improved planning for the demand of services per consumer unit as well as for revenue projections.

Water Services

Growth in domestic and non-domestic consumer/billing units for water services recorded average year on year growth of 2.4 per cent over the 2007 – 2017 period. This equates to a total increase of 34 183 consumer units over this 10-year period within the District.

Non-financial Census of Municipalities	2007	2017	Change 2007 - 2017	Average annual change 2007 - 2017
Domestic and non-domestic water services per consumer/billing unit	125 839	160 022	34 183	2.4%
Indigent support for water services	33 795	44 997	11 202	2.9%

There were an additional 11 202 indigents supported for water services in 2017 when compared with 2007. This indicates overall growth in revenue generating consumer units for water services within the Garden Route District area.

Sanitation Services

There was a 39 553-unit increase in total domestic and non-domestic consumer/billing units for sanitation services over the 2007 – 2017 period, recording an average year on year growth of 2.9 per cent over this 10-year period.

Non-financial Census of Municipalities	2007	2017	Change 2007 - 2017	Average annual change 2007 - 2017
Domestic and non-domestic sanitation services per consumer/billing unit	117 754	157 307	39 553	2.9%
Indigent support for sanitation services	33 729	44 596	10 867	2.8%

There was also growth in indigent support for sanitation services within the Garden Route District, increasing by 10 867 between 2007 and 2017, at an average annual rate of 2.8 per cent.

Electricity Services

Electricity services recorded growth of 28 699 consumer/billing units between 2007 and 2017, increasing at an average annual rate of 2.1 per cent.

Non-financial Census of Municipalities	2007	2017	Change 2007 - 2017	Average annual change 2007 - 2017
Domestic and non-domestic electricity services per consumer/billing unit	127 211	155 910	28 699	2.1%
Indigent support for electricity services	33 578	45 270	11 692	3.0%

The growth in overall consumer/billing units was greater than the growth in indigent support for electricity services, which increased by 11 692 over the 2007 – 2017 period, at an average annual rate of 3.0 per cent. This indicates overall growth in revenue generating consumer units over this period.

Refuse Removal Services

Growth in domestic and non-domestic consumer/billing units for water services recorded slow average year on year growth of 1.2 per cent over the 2007 – 2017 period. This equates to a total increase of 16 547 consumer units over this 10-year period.

Non-financial Census of Municipalities	2007	2017	Change 2007 - 2017	Average annual change 2007 - 2017
Domestic and non-domestic refuse removal services per consumer/billing unit	125 119	141 666	16 547	1.2%
Indigent support for refuse removal services	33 779	44 846	11 067	2.9%

With an additional 11 067 indigents between 2007 and 2017, growth in indigent support was relatively strong between 2007 and 2017, growing at an average annual rate of 2.9 per cent. Growth in indigent support for refuse removal services was still less than additional number of consumer/billing units over the 2007 to 2017 period.

6

SAFETY AND SECURITY

South African society is becoming more and more violent. This was confirmed by the 2017/18 crime statistics released by the South African Police Service (SAPS) and Statistics South Africa (Stats SA). The crime statistics show which type of criminal activity has increased/decreased in the past year. The most notable changes that we have seen so far are the marked increases in crime related to murder as well as cash-in transit.

Between 1993 and 2011 the murder rate declined almost consistently year on year. The highest murder rate in 100 years (78 murders per 100 000 people) was recorded in 1993, as South Africa transitioned to democracy. By 2011 it had dropped to 30.1 per 100 000 people. However, over the past six years we have seen a reversal of this downward trend. The murder rate is currently 35.2 per 100 000, with South Africa remaining one of the 10 most murderous countries in the world.

The Western Cape's persisting crime problems include gang violence, the increase in crimes against women and children and farm murders. Nyanga in the Western Cape remains the area in the country most notorious for its gang violence, its murder rate increased by 9.6 per cent with over 300 murders reflected in the crime stats of 2017/18. The number of women murdered increased by 11 per cent, the number of boys by 20 per cent, and girls by 10 per cent from the year before.

The data depicted in the following section was sourced from the 2018 Crime Statistics released by SAPS and Stats SA in September 2018. Incidences of crime per 100 000 were calculated using actual crime and estimated population figures provided by the Department of Social Development.

The information relating to fatal crashes and crash fatalities were sourced from the Department of Transport and Public Works.



MURDER



Municipal Area		2016	2017	2018
Actual Number	Garden Route District	200	181	183
	Western Cape	3 224	3 311	3 729
Per 100 000	Garden Route District	33	30	29
	Western Cape	51	51	56

Definition: Murder is unlawful and intentional killing of another person.

The 2017/18 crime statistics released by SAPS and Stats SA indicate that murder has increased by 7 per cent to over 20 000 cases recorded in 2017/18. This gives South Africa an alarming 57 murders a day at a rate of 35.7 people murdered per 100 000 population. Within the Western Cape Province, murder has increased by 12.6 per cent (418) from 3 311 to 3 729, almost doubling the national increase of 6.9 per cent in 2017/18.

Within the Garden Route District area, the number of murders increased slightly from 181 in 2017 to 183 in 2018; based on estimated population growth, the murder rate (per 100 000 population) declined marginally from 30 in 2017 to 29 in 2018 while. This was well below the Province's rates of 51 in 2017 and 56 in 2018. Together with the West Coast, the Garden Route District had the lowest district murder rate in the Province.

SEXUAL OFFENCES




Municipal Area		2016	2017	2018
Actual Number	Garden Route District	924	1 037	1 046
	Western Cape	7 130	7 115	7 075
Per 100 000	Garden Route District	151	170	168
	Western Cape	114	110	107

Definition: Sexual offences includes rape (updated to the new definition of rape to provide for the inclusion of male rape), sex work, pornography, public indecency and human trafficking.

The rate of sexual violence in South Africa is amongst the highest in the world. In addition, a number of sexual offence incidences often go unreported (as in the case of rape). With respect to the crime statistic released by SAPS, sexual offences decreased by 0.6 per cent (7 115 to 7 075) in the Western Cape between 2017 and 2018. In 2018, there were 1 046 sexual offences in the Garden Route District area; the District's rate of 168 was well above that of the Province's 107 per 100 000 population.

DRUG-RELATED OFFENCES




Municipal Area		2016	2017	2018
Actual Number	Garden Route District	9 618	10 931	10 809
	Western Cape	93 996	107 379	117 157
Per 100 000	Garden Route District	1 573	1 787	1 733
	Western Cape	1 497	1 657	1 769

Definition: Drug-related crimes refers to the situation where the perpetrator is found to be in possession of, under the influence of, or selling illegal drugs.

The 2017/18 crime Statistics released by SAPS and Stats SA indicate that the Western Cape Province has the highest rate of drug related crime in the country at 1 769 per 100 000 population. It also contributed more than a third (36.2 per cent) of cases to the country's drug related crime in 2017/18. Drug-related crime within the Garden Route District area shows a slight decline in 2018, from 10 931 cases in 2017 to 10 809 cases in 2018. When considering the rate per 100 000 population, with 1 733 crimes per 100 000 population in 2018, the Garden Route District's rate is slightly below that of the Province's rate of 1 769. Although drug-related crime remains a challenge, the Garden Route has one of lower district rates in the Province.

DRIVING UNDER THE INFLUENCE




Municipal Area		2016	2017	2018
Actual Number	Garden Route District	1 494	1 441	1 739
	Western Cape	11 725	12 895	12 776
Per 100 000	Garden Route District	244	236	279
	Western Cape	187	199	193

Definition: Driving under the influence (DUI) refers to a situation where the driver of a vehicle is found to be over the legal blood alcohol limit. This is a crime detected through police activity rather than reports by members of the public.

Despite concerted efforts by government our roads are still considered amongst the most dangerous in the world. Reckless driving and alcohol consumption remain of the top reasons for road accidents. The number of cases of driving under the influence of alcohol or drugs in the Garden Route District area shows an increase of 298, from 1 441 in 2017 to 1 739 in 2018. This translates into a rate of 279 per 100 000 population in 2018, which is well above that of the Province's 193 per 100 000 population in 2018.

RESIDENTIAL BURGLARIES




		Municipal Area		
		2016	2017	2018
Actual Number	Garden Route District	5 931	5 654	5 208
	Western Cape	47 569	46 043	42 662
Per 100 000	Garden Route District	970	924	835
	Western Cape	758	710	644

Definition: Residential burglary is defined as the unlawful entry of a residential structure with the intent to commit a crime, usually a theft.

The 2017/18 crime statistics released by SAPS indicate that the number of residential burglaries in the Western Cape decreased by 7.3 per cent between 2017 and 2018. Residential burglary cases within the Garden Route District area also declined from 46 043 in 2017 to 42 662 in 2018. The rate (per 100 00 population) of 835 in 2018 is above that of the Province's 644 per 100 000 population. Although declining, the number of cases of residential burglaries remain a serious concern throughout the District area, particularly in the George and Mossel Bay areas.

FATAL CRASHES



		2015	2016	2017
Area				
Garden Route District		99	116	111
Western Cape		1 187	1 234	1 244

Definition: A crash occurrence that caused immediate death to a road user i.e. death upon impact, flung from the wreckage, burnt to death, etc.

Fatal crashes involving motor vehicles, motorcycles, cyclists and pedestrians within the jurisdiction of the Garden Route District has increased from 99 to 116 between 2015 and 2016, but declined again in 2017 to 111. The number of fatal crashes in the broader Western Cape Province increased by 87 between 2015 and 2016 and by a further 10 to a total of 1 244 in 2017.

ROAD USER FATALITIES

Area	2015	2016	2017
Garden Route District	128	124	132
Western Cape	1 345	1 403	1 364

Definition: The type of road user that died in or during a crash i.e. driver, cyclist, passengers, pedestrians.

According to a recent study, the majority of road fatalities in Africa fall within the working age cohort - between the ages of 15 – 64 years – whilst three out of four fatalities were found to be male (Peden et al., 2013). The untimely death of these primary breadwinners therefore impacts directly upon not only the livelihood of family structures, but deprive society of active economic participants that contribute towards growth and development. The socio-economic impact of such road fatalities has proven to be particularly devastating in South Africa where the majority of road users hail from poor and vulnerable communities.

The previous section specified that a total of 111 fatal road crashes occurred within the Garden Route District region in 2017. As seen in the table above, a total of 132 road users died in these crashes. While the number of fatal crashes declined slightly in comparison with 2016, the number of fatalities in the Garden Route District area marginally increased in 2017.

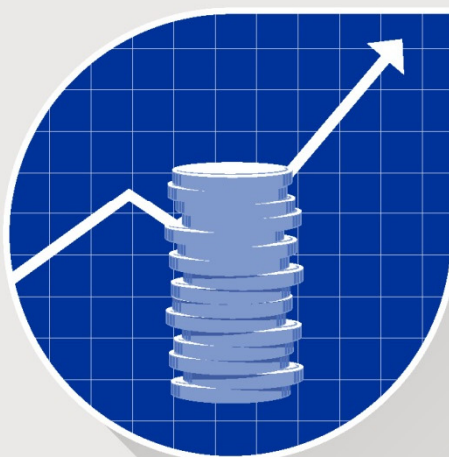
Additional, lower-level information regarding the time, location, gender, ages of above specified crashes are available from the Department of Transport and Public Works upon request.

7

THE ECONOMY

Economic activity within municipal boundaries is important as it shows the extent of human development and the living standards of communities. Although municipalities have no power to change taxes in order to stimulate economic activity, there are a few levers that local government authorities have control over to contribute to economic performance, including, amongst others, procurement of goods and services, job creation through expanded public works programmes as well as creating an enabling environment for small businesses.

The ability of households to pay for services such as water, electricity, sanitation and refuse removal depends on income generated from economic activities. A slowdown in economic activity may result in job losses and the inability of households to pay for services, leading to reduced municipal revenues. Data on macroeconomic performance, especially the information on sectoral growth and employment, is useful for municipalities' revenue and expenditure projections.



ECONOMIC SECTOR PERFORMANCE

The local economy of the Garden Route municipal area is dominated by the finance, insurance, real estate and business services sector (R10 014.3 million or 24.9 per cent), followed by the wholesale and retail trade, catering and accommodation sector (R7 223.4 million or 17.9 per cent), manufacturing sector (R5 853.9 million or 14.5 per cent in 2016), general government (R4 106.2 million or 10.2 per cent) and transport, storage and communication (R4 019.8 million or 10.0 per cent). Combined, these five three sectors contributed R31.2 billion (or 77.5 per cent) to the Garden Route District municipal economy, which was estimated be worth R40.3 billion in 2016.

Garden Route District GDP performance per sector, 2006 – 2017e									
Sector	Contribution to GDP (%) 2016	R million value 2016	Trend		Real GDP growth (%)				
			2006 - 2016	2013 – 2017e	2013	2014	2015	2016	2017e
Primary Sector	6.1	2 443.0	1.4	0.5	1.8	6.4	-2.7	-7.3	4.4
Agriculture, forestry and fishing	5.7	2 295.1	1.5	0.4	1.7	6.4	-2.9	-7.7	4.2
Mining and quarrying	0.4	148.0	0.2	3.5	2.7	6.8	-0.1	0.5	7.7
Secondary Sector	24.2	9 750.3	1.8	0.8	2.0	1.0	0.2	0.9	-0.2
Manufacturing	14.5	5 853.9	1.9	0.9	1.7	0.6	0.3	1.6	0.4
Electricity, gas and water	3.1	1 244.6	-1.1	-1.4	-0.7	-1.2	-2.2	-2.7	-0.1
Construction	6.6	2 651.8	3.2	1.2	3.9	2.9	0.6	0.4	-1.8
Tertiary Sector	69.7	28 077.6	3.3	2.4	3.2	2.8	2.4	2.1	1.3
Wholesale and retail trade, catering and accommodation	17.9	7 223.4	2.5	1.4	2.4	1.5	1.9	1.9	-0.7
Transport, storage and communication	10.0	4 019.8	3.4	2.5	3.2	4.0	1.5	1.5	2.4
Finance, insurance, real estate and business services	24.9	10 014.3	4.2	3.4	3.8	3.5	3.9	3.2	2.7
General government	10.2	4 106.2	2.7	1.2	3.5	2.6	0.3	0.4	-0.6
Community, social and personal services	6.7	2 714.0	2.1	1.6	2.5	1.8	1.1	1.5	1.2
Total Garden Route District	100.0	40 270.9	2.8	1.9	2.9	2.6	1.5	1.2	1.2

Source: Quantec Research, 2017 (e denotes estimate)

The 10-year trend, between 2006 and 2016, shows that the finance, insurance, real estate and business services sector registered the highest average growth rate (4.2 per cent) in the Garden Route District during this period, followed by the transport, storage and communication (3.4 per cent) and construction (3.2 per cent) sectors. Growth of the agriculture sector shrunk into negative territory in 2015 and 2016 due to the severe drought but the estimated growth rate for 2017 is 4.2 per cent.

LABOUR

This section highlights key trends in the labour market within the Garden Route District municipal area.

The wholesale and retail trade, catering and accommodation sector contributed the most jobs in the Garden Route municipal area in 2016 (52 954 or 23.9 per cent), followed by the finance, insurance, real estate and business services sector (38 357 or 17.3 per cent); community, social and personal services (33 584 or 15.1 per cent); agriculture, forestry and fishing (29 192 or 13.1 per cent) and general government (22 767 or 10.3 per cent). Combined, these top five sectors contributed 176 854 or 79.7 per cent of the 222 010 jobs in 2016.

Garden Route District employment growth per sector 2006 – 2017e									
Sector	Contribution to employment (%)	Number of jobs 2016	Trend		Employment (net change)				
	2016		2006 - 2016	2013 – 2017e	2013	2014	2015	2016	2017e
Primary Sector	13.2	29 381	-13 853	3 656	1 633	-1 203	5 166	-1 189	-751
Agriculture, forestry and fishing	13.1	29 192	-13 860	3 639	1 633	-1 207	5 155	-1 188	-754
Mining and quarrying	0.1	189	7	17	0	4	11	-1	3
Secondary Sector	16.2	35 905	-569	2 568	788	816	222	353	389
Manufacturing	8.9	19 715	-553	1 558	645	190	341	-192	574
Electricity, gas and water	0.4	875	279	105	7	20	25	35	18
Construction	6.9	15 315	-295	905	136	606	-144	510	-203
Tertiary Sector	70.6	156 724	34 929	18 568	4 196	3 857	5 020	154	5 341
Wholesale and retail trade, catering and accommodation	23.9	52 954	9 520	6 835	977	615	2 214	80	2 949
Transport, storage and communication	4.1	9 062	2 972	1 121	574	270	607	-753	423
Finance, insurance, real estate and business services	17.3	38 357	12 948	7 069	1 503	1 436	1 941	950	1 239
General government	10.3	22 767	4 262	-415	-306	1 019	-550	279	-857
Community, social and personal services	15.1	33 584	5 227	3 958	1 448	517	808	-402	1 587
Total Garden Route District	13.2	222 010	20 507	24 792	6 617	3 470	10 408	-682	4 979

Source: Quantec Research, 2018 (e denotes estimate)

Only the agriculture, forestry and fishing, manufacturing and construction sectors in the Garden Route District municipal area reported average decreases in jobs (-13 860, -553, and -295 respectively) between 2006 and 2016. There were also some job losses reported in the agriculture, forestry and fishing sector in 2016 and 2017 due to the severe drought. This is concerning considering that it provides a significant contribution to Garden Route District's employment. The sector which reported the largest increase in jobs between 2006 and 2016 was the finance, insurance, real estate and business services (12 948) and wholesale, retail and trade (2 658) and community, social and personal services (5 227).

The majority of workers in the Garden Route labour force in 2016 was dominated by semi-skilled workers (41.0 per cent) and 27.5 per cent were skilled.

Garden Route District trends in labour force skills, 2006 - 2017					
Formal employment by skill	Skill level contribution (%)	Average growth (%)		Number of jobs 2016	
	2016	2006 - 2016	2013 - 2017e	2016	2017e
Skilled	27.5	3.4	3.7	44 472	45 114
Semi-skilled	41.0	0.7	2.0	66 293	66 149
Low skilled	31.5	-0.6	1.9	50 907	50 587
Total Garden Route District	100.0	0.9	2.4	161 672	161 850

Source: Quantec Research, 2018 (e denotes estimate)

The number of skilled workers increased relatively fast over the 2006 – 2016 period, while growth was slower for semi-skilled workers; low skilled employment declined over this period. An improvement in education and economic performance can contribute to further increases in the number of higher skilled workers.

Unemployment Rates for the Western Cape (%)											
Area	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017e
City of Cape Town	16.2	15.2	16.5	17.8	17.9	18.1	18.1	18.5	19.1	20.3	21.1
West Coast	4.7	6.5	7.9	9.3	9.7	9.6	9.2	10.0	9.0	10.1	11.1
Cape Winelands	6.5	7.2	8.3	9.6	9.8	9.7	9.4	9.9	9.1	10.1	10.7
Overberg	6.2	6.9	8.3	9.7	10.0	10.0	9.8	10.5	9.8	11.1	11.8
Garden Route	13.2	12.7	13.8	15.0	14.9	15.0	14.8	15.1	15.0	16.3	17.0
Central Karoo	20.5	21.0	22.0	22.9	22.6	22.4	22.1	22.6	21.7	23.0	24.0
Western Cape	13.3	12.9	14.2	15.5	15.7	15.8	15.7	16.1	16.2	17.4	18.2

Source: Quantec Research, 2018 (e denotes estimate)

Over the last decade, the Garden Route District's unemployment rate² has been rising steadily; it has increased from 15.0 per cent in 2015 to 16.3 per cent in 2016 and an estimated 17.0 per cent in 2017. The Garden Route District's unemployment rate in 2017 is slightly lower than that of the Province's 18.2 per cent.

² Narrow definition: Percentage of people that are able/willing to work, but unable to find employment. In turn, broad definition refers to people that are able to work, but not actively seeking employment. Broad definition is more difficult to accurately measure/calculate.

SOURCES

1. Demographics

- Population: *Department of Social Development, 2018*
- Age cohorts: *Department of Social Development, 2018*

2. Education

- Learner enrolment: *Western Cape Education Department, 2017; Annual Survey of Public and Independent Schools (ASS), 2017*
- Learner-teacher ratio: *Western Cape Education Department, 2017; Annual Survey of Public and Independent Schools (ASS), 2017*
- Grade 12 drop-out rates: *Western Cape Education Department, 2017; Annual Survey of Public and Independent Schools (ASS), 2017*
- Educational facilities: *Western Cape Education Department, 2017; Annual Survey of Public and Independent Schools (ASS), 2017*
- Educational outcomes: *Western Cape Education Department, 2017; Annual Survey of Public and Independent Schools (ASS), 2017*

3. Health

- Healthcare facilities: *Department of Health, 2018*
- Emergency medical services: *Department of Health, 2018*
- HIV/AIDS: *Department of Health, 2018*
- Tuberculosis: *Department of Health, 2018*
- Child health: *Department of Health, 2018*
- Maternal health: *Department of Health, 2018*

4. Poverty

- GDP per capita: *Statistics South Africa, 2018; own calculations*
- Income Inequality: *IHS Global Insight, 2018*
- Human Development: *IHS Global Insight, 2018*

SOURCES

5. Basic Services

- Households: *Statistics South Africa, Community Survey 2016*
- Access to housing: *Statistics South Africa, Community Survey 2016*
- Access to water: *Statistics South Africa, Community Survey 2016*
- Access to electricity: *Statistics South Africa, Community Survey 2016*
- Access to sanitation: *Statistics South Africa, Community Survey 2016*
- Access to refuse removal: *Statistics South Africa, Community Survey 2016*
- Growth in water/electricity/sanitation and refuse removal services per consumer/billing unit: *Statistics South Africa, Non-Financial Census of Municipalities 2007 and 2017*
- Indigent support for water/electricity/sanitation and refuse removal services: *Statistics South Africa, Non-Financial Census of Municipalities 2007 and 2017*

6. Safety and Security

- Murder: *South African Police Service (SAPS), 2018*
- Sexual offences: *South African Police Service (SAPS), 2018*
- Drug-related crimes: *South African Police Service (SAPS), 2018*
- Driving under the influence: *South African Police Service (SAPS), 2018*
- Residential burglaries: *South African Police Service (SAPS), 2018*
- Fatal crashes: *Department of Transport and Public Works, 2018*
- Road user fatalities: *Department of Transport and Public Works, 2018*

7. Economy

- Sector Performance: *Quantec Research, 2018*
- Labour: *Quantec Research, 2018*