

4/52

PROFILE AND ANALYSIS
DISTRICT DEVELOPMENT MODEL

GARDEN ROUTE

DISTRICT MUNICIPALITY WC

The leading, enabling
and inclusive district,
characterised by
equitable and sustainable
development, high
quality of life and equal
opportunities for all.



cooperative governance
& traditional affairs
Department:
Cooperative Governance and Traditional Affairs
REPUBLIC OF SOUTH AFRICA



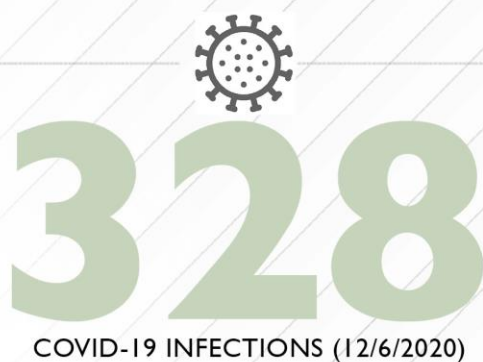
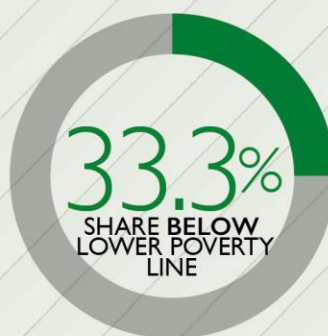
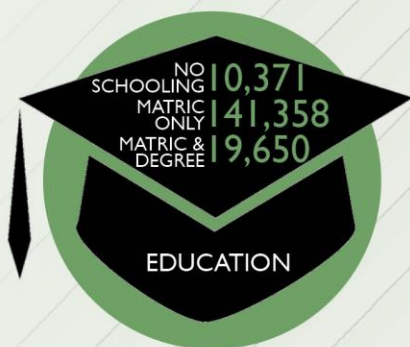
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GARDEN ROUTE BY NUMBERS

663 179

POPULATION



A DISTRICT
WITH DIVERSE
NATURAL
RESOURCES
FROM THE
'GARDEN
ROUTE' TO
THE 'KLEIN
KAROO'

NEXT BIG THING
Define role within the Green
Energy sector and promote Green
Energy initiatives and projects in
the Garden Route District

1. Executive Summary

The Garden Route District Municipality is situated on the south – eastern coast of the Western Cape Province and covers a total surface area of 23 331 km². It stretches to the Breede River mouth and the Langeberg mountains on the west, where it abuts the Overberg District Municipality and the Cape Winelands District Municipality. To the north the boundary with the Central Karoo District Municipality runs along the Swartberg mountains. In the east the municipality runs up to the Eastern Cape provincial boundary.

The Garden Route District Municipality consists of seven (7) local category B Municipalities which are: George, Bitou, Knysna, Kannaland, Oudtshoorn, Hessequa, and Mossel Bay. Garden Route District has 2% people without any education. In total, the number of people with primary and secondary education is 46.5%, while 31.1% of people in the City has matric. Only 3.7% of people in the Garden Route District have an undergraduate qualification.

The District's economy is dominated by Community and Government Services, Trade, Finance and Manufacturing. The economic growth and development of the district depends on monopolizing on its competitive advantages. The district has a wide range of competitive advantages ranging from the coastal line (with opportunities of ocean economy, coastal tourism) large forestry, arable land for agriculture and farming and effective natural resources.

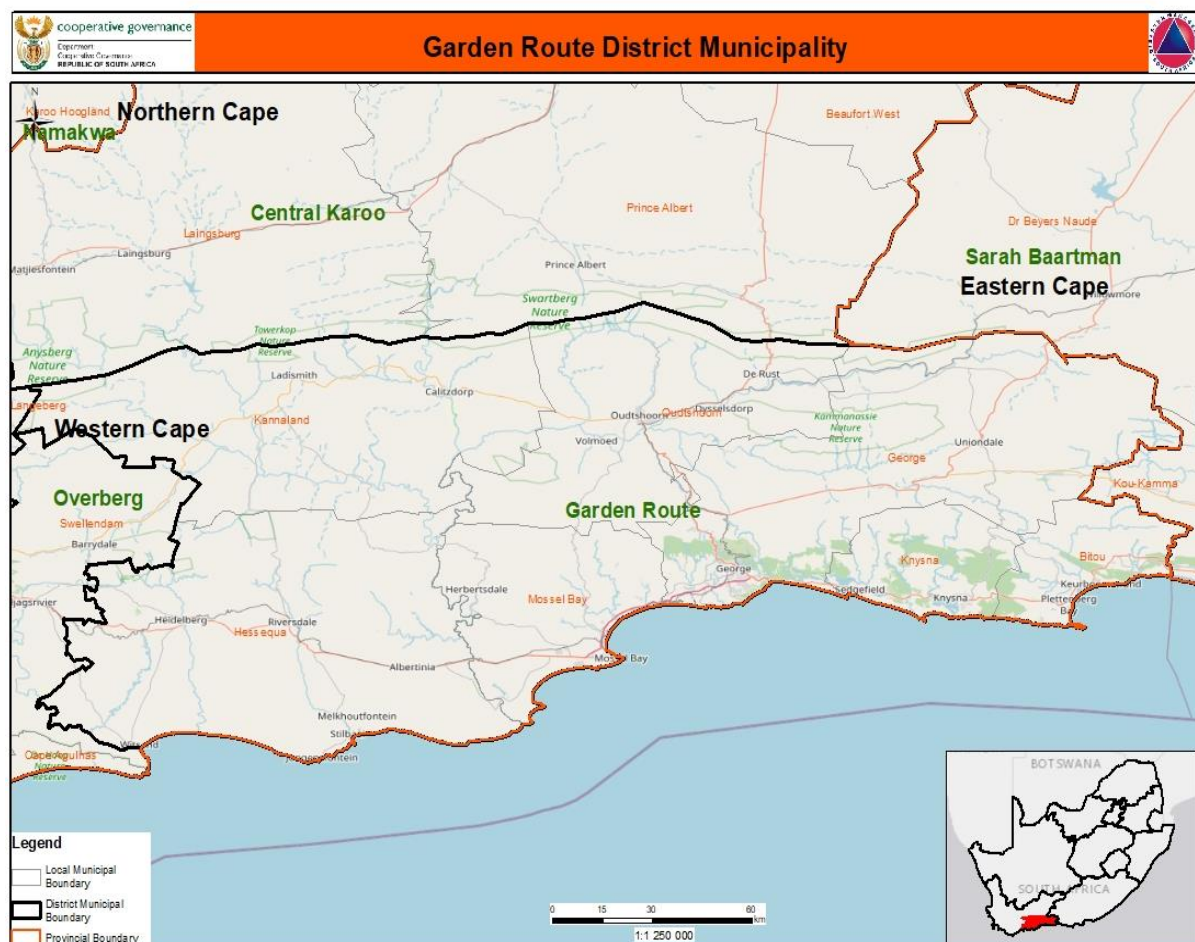
In terms of the Garden Route District Municipality draft Reviewed IDP 2020/2021, the Garden Route District Council must consider the key interventions which are critical to deliver on its mandate as the district's strategic coordinator, facilitator and enabler of services delivery. It is necessary to define Garden Route DM's role and function within the Green Energy sector and promote Green Energy initiatives and projects in the Garden Route District (as identified in the IDP).

The conservation of biodiversity, and specifically water resources, is becoming more important in the context of climate change. Invest in integrated programmes and strategies to protect ecosystems through good land use planning, considering disaster risk reduction and climate change adaptation plans. (supply of bulk water storage and improved water management; preserve wetlands, etc).

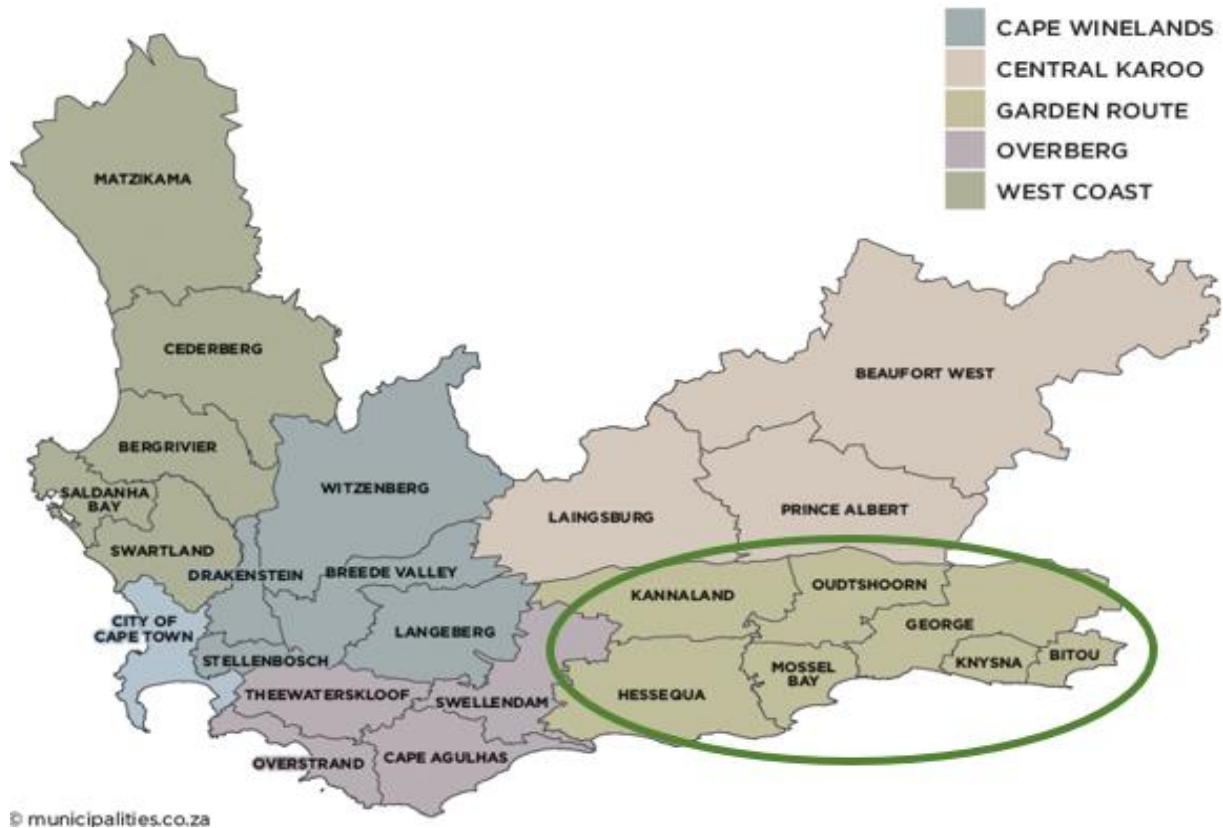
2. Overview

2.1 Location




The Garden Route District Municipality is situated on the south – eastern coast of the Western Cape Province and covers a total surface area of 23 331 km². It stretches to the Breede River mouth and the Langeberg mountains on the west, where it abuts the Overberg District Municipality and the Cape Winelands District Municipality. To the north the boundary with the Central Karoo District Municipality runs along the Swartberg mountains. In the east the municipality runs up to the Eastern Cape provincial boundary.




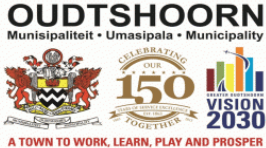


The geographic area of the GRDM consists of seven municipalities, i.e. Bitou, Knysna, George, Mossel Bay, Oudtshoorn, Kannaland and Hessequa. There are 140 informal settlements in the GRDM, together amounting to 15% of all households and the housing waiting list amounts to 65 000 households. Roughly, 80% of the district's population lives in urban areas along the coast. Oudtshoorn is the largest inland town, located along the R62 and N12 linking smaller inland towns of Ladismith, Calitzdorp, De Rust and Uniondale.



The following describes key features of the local municipalities in the District:

	<p>WC:044</p> <p>This municipality is situated in a district, which is informally known as the Garden Route, with its hubs, nestled among the slopes of the majestic Outeniqua Mountains and flanked by the Indian Ocean to the south. It is situated on the major transport routes between Cape Town in the south and Port Elizabeth in the east.</p>
	<p>WC:041</p> <p>Kannaland municipality is renowned for its cheese factories and the production of world famous dairy and wine products.</p>
	<p>WC:043</p> <p>Its main economic activity is agriculture (Aloes, cattle, dairy, ostriches, sheep, timber, vegetable and wines), fishing light industry, petrochemicals and tourism.</p>

	<p>WC:047</p> <p>This municipality is situated along the Garden Route. Plettenberg bay is rife with a number of invertebrates such as anemones, nudibranchs and sponges. Bitou has over four different kinds of reefs and is particularly famous for being the best night-time diving spot.</p>
	<p>WC:042</p> <p>This municipality is nestled in the shadows of the Langeberg Mountains and in the embrace of the warm Indian Ocean, stretching from the Breede River in the west to the Gourits River in the east.</p>
	<p>WC:048</p> <p>This municipality is one of the smallest municipalities of the seven that makes up the district, accounting for only 5% of its geographical area, main economic sectors; wholesale and retail trade, catering and accommodation, finance, insurance, real estate and business.</p>
	<p>WC:045</p> <p>The greater Oudtshoorn area is nestled at the foot of the Swartberg Mountains in the little Karoo region. It is defined as the semi-desert area with a unique and sensitive natural environment. It was once the indigenous home of the Khoi-san people and the rock paintings on the walls of the caves in the surroundings area sends a message that survival in this area requires respect for the natural environment.</p>

2.2 Historical Perspective

The town of George, which is central to Garden Route District Municipality, is the sixth oldest town in South Africa. In 1837 George gained Municipal status. It has the oldest Roman Catholic Church in the country, completed in 1843.

South Africa's largest Rastafarian community, the Judah Square Rastafarian Village is situated in the Khayaletu Township in Knysna.

Mossel Bay is known as the historical capital of the Garden Route and one of the most historically significant towns in South Africa. Caves at Pinnacle Point have revealed evidence that some of the planet's very first inhabitants lived here. The Khoi and San people are some of the earliest inhabitants here. Bartholomeu Dias, the Portuguese navigator, was the first European to land in Mossel Bay on 3 February

1488– 165 years before the first settlement in Cape Town. The early seafarers found 3 tribes here, the Gouriqwas, the Outeniqua or Attaqwa, and the San.

On the 9th June 2015 UNESCO (United Nations Education, Scientific and Cultural Organisation) approved the Gouritz Cluster Biosphere Reserve (GCBR) in the Hessequa region, as South Africa's 7th biosphere reserve. It exists to promote sustainable development through combining local community efforts with science.

The history of Oudtshoorn is rich and varied. Rock Art is found on many private farms in the area, giving a glimpse of "Feather Palaces" that sprang up during the ostrich feather boom. By the 1880s ostrich feathers had become South Africa's fourth largest export after gold, diamonds and wool and Oudshoorn was at the epicenter of this.

*"THE EARLY SEAFARERS FOUND 3 TRIBES
HERE, THE GOURIQWAS, THE OUTENIQUA
OR ATTAQWA, AND THE SAN."*

2.3 Spatial Status

The Garden Route District Municipality is highly urbanized with 75% of the population centred between three principal regional centres George, Mossel bay and Knysna while the remaining 15% is scattered amongst other towns within the district. The coastal towns have experienced a growth in population because of declining population in Little Karoo. The district is divided into different functional areas categorized as:

- Agricultural Service centres: - Calitzdorp, Ladismith, Riversdale and Uniondale.
- Regional service centre: - George Oudsthoorn, Mossel Bay
- Residential centres: - Dysseldorp, Kranshoek, Kurland
- Residential/Tourism: Groot Brakriver, Herolds Bay, Sedgefield, Stilbaai, Wilderness
- Tourism: De Rust, Knysna and Nature's valley

Urban areas have been characterized by urban sprawl, which is driven by dispersed, low-density greenfield higher income development and low-income settlements located on the outskirts of the current settlement footprint. This result in a social and spatial fragmentation in the urban areas.

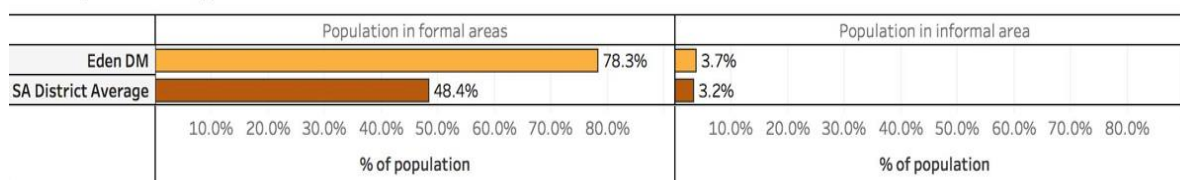
The inland areas of the Garden Route District are characterised by a strongly rural setting with dispersed farming hamlets and small towns, which in some cases are

isolated due to transport and social service delivery costs. Along the coast, the dominant port industrial town of Mossel Bay is functionally linked inland with George, the services centre of the District, as well as along the N2 to the tourism and lifestyle driven settlements of Knysna, Bitou to the East. To the west of Mossel Bay, the towns of Riviersonderend and Riversdale are gateways to the Garden Route and South to the coastal towns of Witsand, Stilbaai and Gouritzmond.

2.4 Land Ownership

Stats SA defines an informal settlement as an unplanned settlement on land that has not been surveyed or proclaimed as residential, with housing that consists mainly of informal dwellings. The figure below compares the numbers and area occupied by people living in formal and informal human settlements:

% of Population living in formal and informal areas



In 2016, 69.5% of residences are fully owned or being paid off, which is about 10 percent higher than the rate in Western Cape: 65.09% and about 10 percent higher than the rate in South Africa: 64.97%

A land claim is a request for the restoration of a right in land, lodged with the Commission on Restitution of Land Rights. Anyone who was dispossessed of a right in land after 19 June 1913 as a result of past racially discriminatory laws or practices, and who did not receive just and equitable compensation at the time of dispossession, can lodge a claim for the restoration of such a right, or equitable redress¹. The table below highlights the total area of the municipality under a land claim process.

	Sum of Land Claims
DC4: Garden Route	8,546
WC total	64,379
SA total	20617,156

¹ http://www.ruraldevelopment.gov.za/component/content/article/347-land-claim/re-opening/771-faq#.W2AQ_NIzY2w

3. Social Development Profile

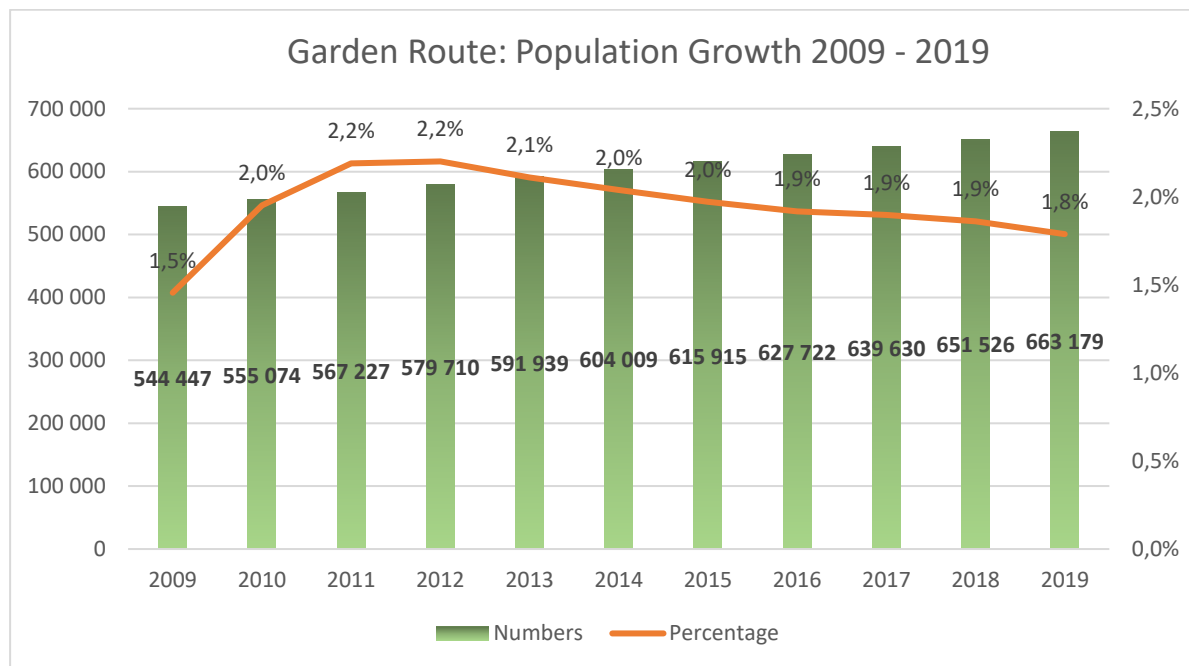
3.1 Key Social Demographics

With 663 179 people, the Garden Route District Municipality housed 1.1% of South Africa's total population in 2019. Between 2009 and 2019 the population growth averaged 1.99% per annum which is slightly higher than the growth rate of South Africa as a whole (1.61%).

Population

The Bitou Local Municipality increased the most, in terms of population, with an average annual growth rate of 4.1%, the Knysna Local Municipality had the second highest growth in terms of its population, with an average annual growth rate of 2.4%. The Kannaland Local Municipality had the lowest average annual growth rate of 0.27% relative to the other within the Garden Route District Municipality.

The table below indicates the population growth over 10 years from 2009 to 2019.



Race, Gender and Age

In 2019, the Garden Route District Municipality's population consisted of 30.41% African (202 000), 16.82% White (112 000), 52.22% Coloured (346 000) and 0.55% Asian (3 670) people.

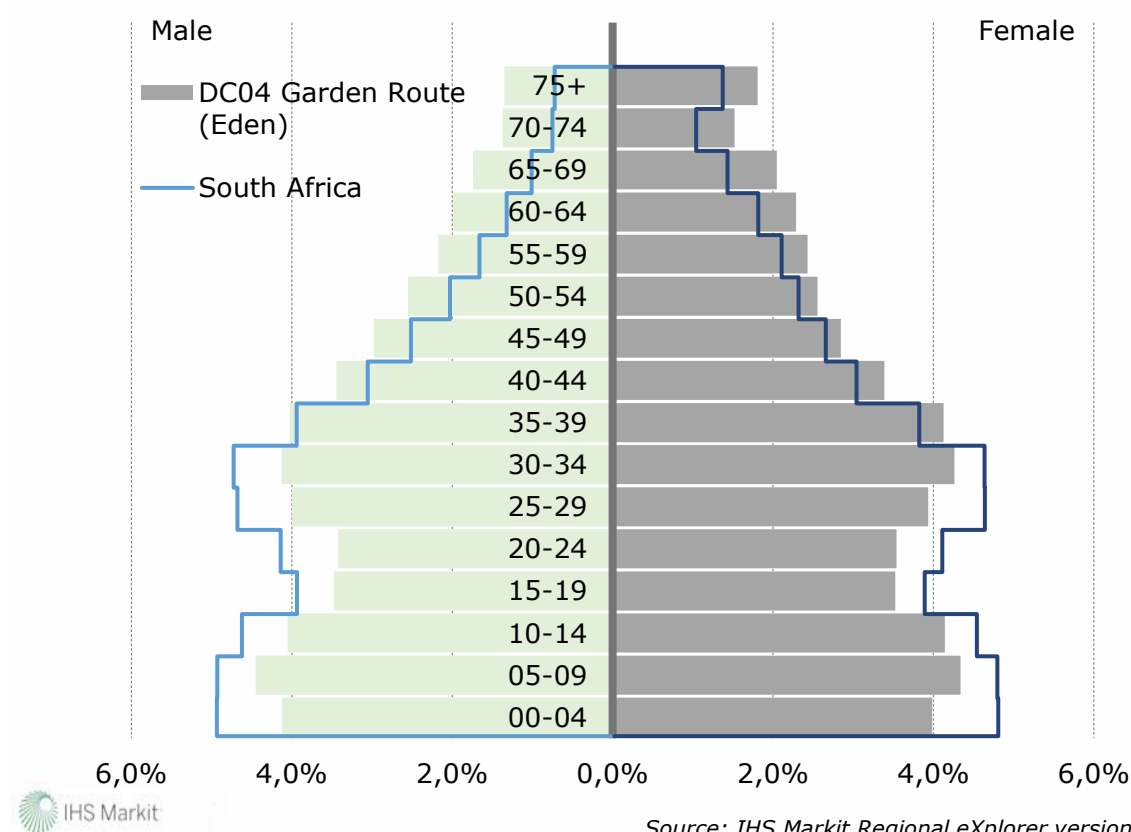
Garden Route District's share of female population (50.74%) is similar to the national average of (51.04%). In total there were 336 000 (50.74%) females and 327 000 (49.26%) males.

By comparing the population pyramid of the Garden Route District Municipality with the national age structure, the most significant differences are:

- There is a significant smaller share of young working age people - aged 20 to 34 (23.3%) - in Garden Route, compared to the national picture (26.9%).
- The area seems to be a migrant sending area, with many people leaving the area to find work in the bigger cities.
- Fertility in Garden Route is slightly lower compared to South Africa as a whole.
- The share of children between the ages of 0 to 14 years is significant smaller (25.1%) in Garden Route compared to South Africa (28.6%). Demand for expenditure on schooling as percentage of total budget within Garden Route District Municipality will therefore be lower than that of South Africa.

Population structure, Total, 2019

DC04 Garden Route (Eden) vs. National



Households

In 2019, the Garden Route District Municipality comprised of 198 000 households. This equates to an average annual growth rate of 2.50% in the number of households from 2009 to 2019. With an average annual growth rate of 1.99% in the total population, the average household size in the Garden Route District Municipality is by implication decreasing. This is confirmed by the data where the average household size in 2009 decreased from approximately 3.5 individuals per household to 3.3 persons per household in 2019.

Child Headed Households

There are 890 households with heads under 18 years old in the GRDM which is about one-fifth of the figure in Western Cape: 4 877 and less than 10 percent of the figure in South Africa: 111 471. 11.6% (103) child-headed households are living in informal dwellings (shacks) which is about half the rate in Western Cape: 24.71% (1,205) and a little higher than the rate in South Africa: 11.01% (12,268).

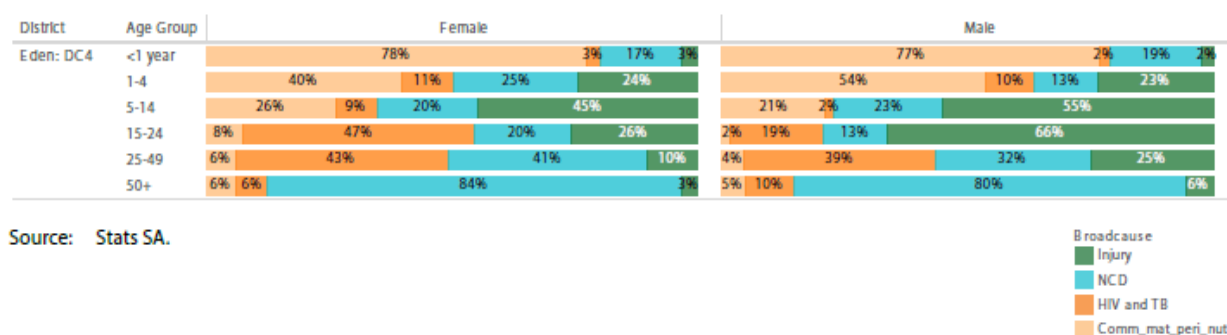
Women Headed Households

The Community Survey in 2016 identified 36.1% women-headed households in the GRDM. This is a little less than the rate of 38.04% in Western Cape and about 90 percent of the rate of 41.32% in South Africa.

Health Profile

South Africa faces a quadruple burden of diseases. Deaths are therefore classified into four broad causes (or groups), namely: (i) injuries; (ii) non-communicable diseases; (iii) HIV and TB; and (iv) communicable diseases together with maternal, perinatal and nutritional conditions. Data are given by gender and age group for the period 2013 – 2015.

Percentage of deaths by broad cause, 2013 - 2015



In terms of healthcare facilities, the Garden Route District municipal area had 69 primary healthcare clinics (PHC) in 2018, which comprises of 32 fixed and 37 mobile clinics. There are also 7 community day centres. In addition, there are 6 district hospitals, one regional hospital, as well as 51 antiretroviral treatment clinics/ treatment sites and 86 tuberculosis clinics/ treatment sites.

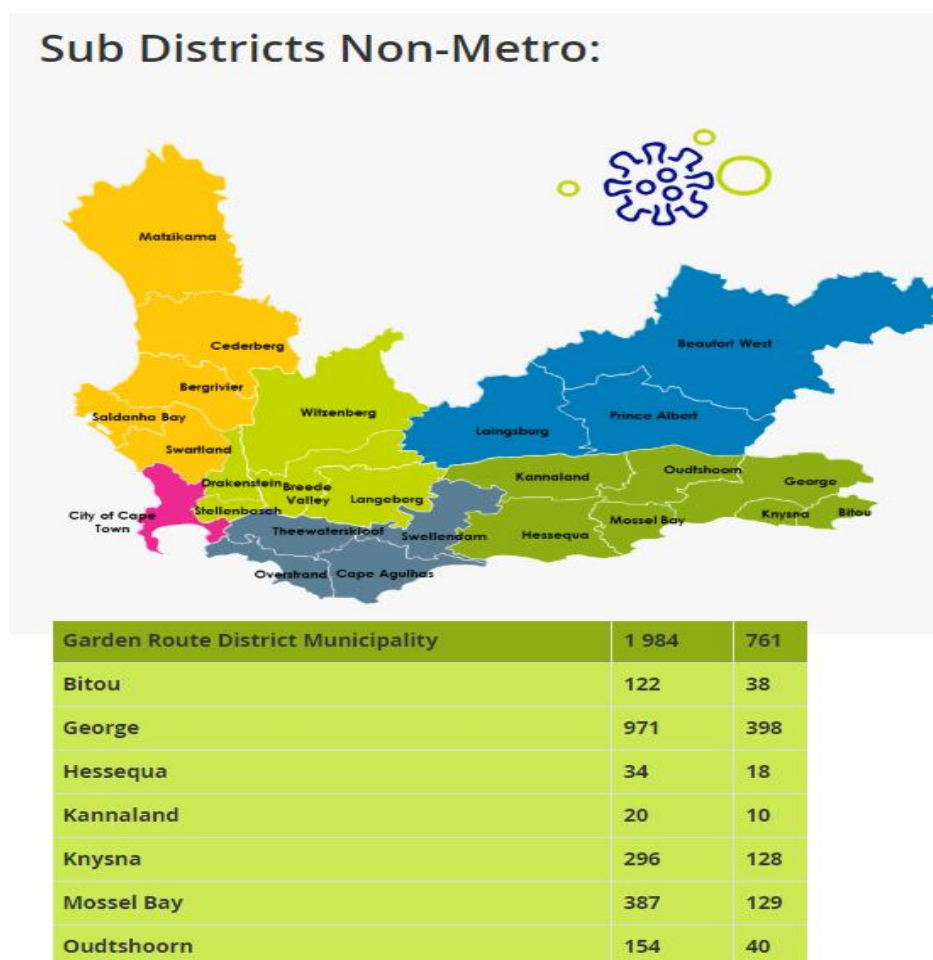
Area	PHC Clinics		Community Health Centres	Community Day Centres	Hospitals		Treatment Sites	
	Fixed	Non-fixed			District	Regional	ART Clinics	TB Clinics
Garden Route District	32	37	0	7	6	1	51	86
Western Cape	190	177	11	62	33	5	283	448

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 ATR 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.

In contrast to the rising numbers of HIV/AIDS cases, the Garden Route District experienced a decline in 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 treatment sites in the Province. The Garden Route's TB patients are treated at 88 TB clinics or treatment sites.

Covid-19

In respect of COVID-19, as of 1 pm on 7 July 2020, the Western Cape has 16 958 active cases of Covid-19, with a total of 71 272 confirmed cases and 52 175 recoveries. The figure shows the cases and recoveries in Garden Route District:



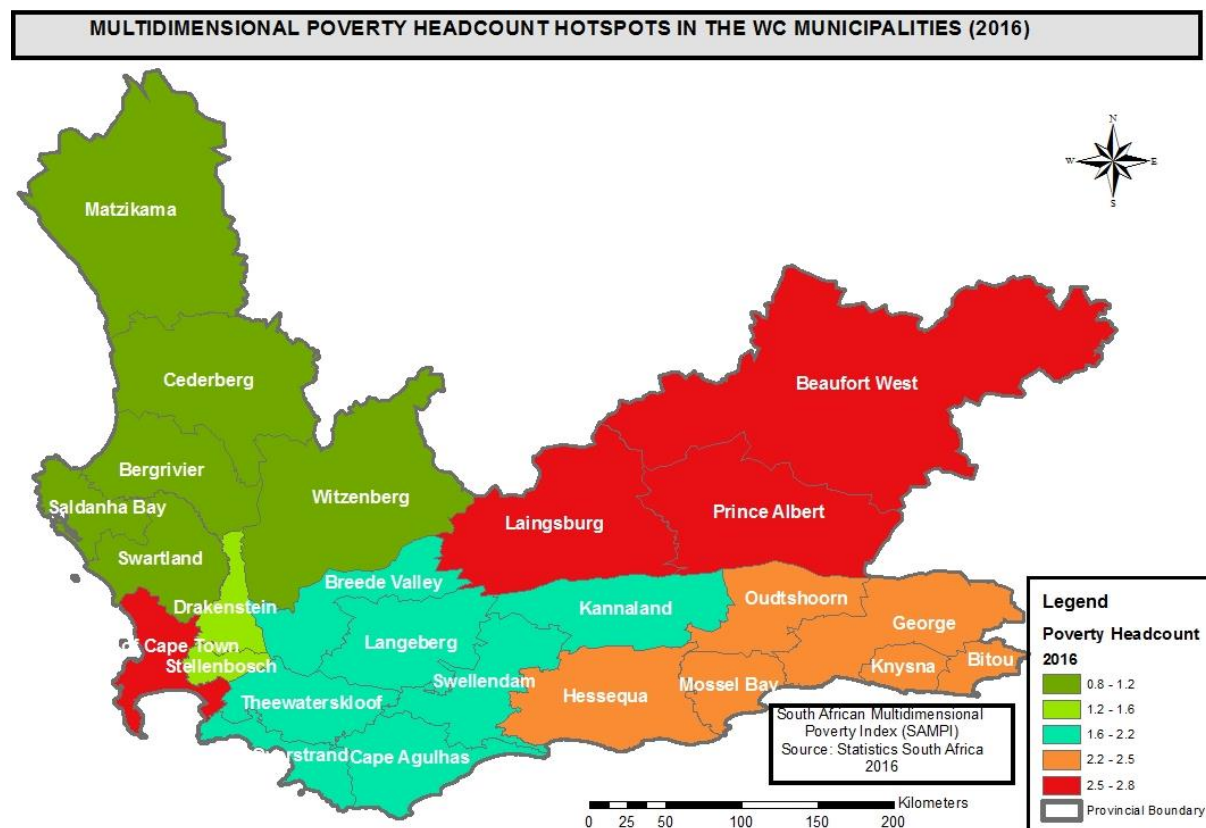
As reflected in the table below, there is a total of 12 quarantine facilities in the district. Only 2 have been activated.

DISTRICT (select option from drop down)	TOWN (select option from drop down)	State-owned or Private	NO OF ROOMS AVAILABLE	NO OF BEDS AVAILABLE	Number of PUI's quarantined at this site to date	Total Number of PUI's to date	STATUS OF FACILITY	Activated Site
Eden	Mossel Bay	State-Owned		700	3	3	Assessed and approved b	Activated
Eden	Newlands	Private	162	162	62	62	Assessed and approved b	Activated
Eden	Knysna	State-Owned	2	4		0	DOH Compliant	Pending
Eden	Knysna	State-Owned	2	5		0	DOH Compliant	Pending
Eden	Hessequa NU	State-Owned	5	40		0	DOH Compliant	Pending
Eden	Kannaland NU	State-Owned	12	28		0	DOH Compliant	Pending
Eden	Oudtshoorn	State-Owned	16	120		0	DOH Compliant	Pending
Eden	Calitzdorp	Private	26	104		0	DOH Compliant	Pending
Eden	Oudtshoorn NU	State-Owned	11	41		0	DOH Non-Compliant	Pending
Eden	Still Bay		46	46		0	Not assessed	Pending
Eden	Albertinia		3	3		0	Not assessed	Pending
Eden	Wilderness	State-Owned	15	116		0	Not assessed	Pending

3.3 Poverty Dimensions

3.3.1 Distribution

The heat map below depicts the concentration of poverty at district level, using income per household using lower poverty line (Stats SA 2016)



According to IHS Markit (Global Insight), 33.3% of the Garden Route DM population lived below the lower poverty line in 2019, (i.e., receive a monthly income that

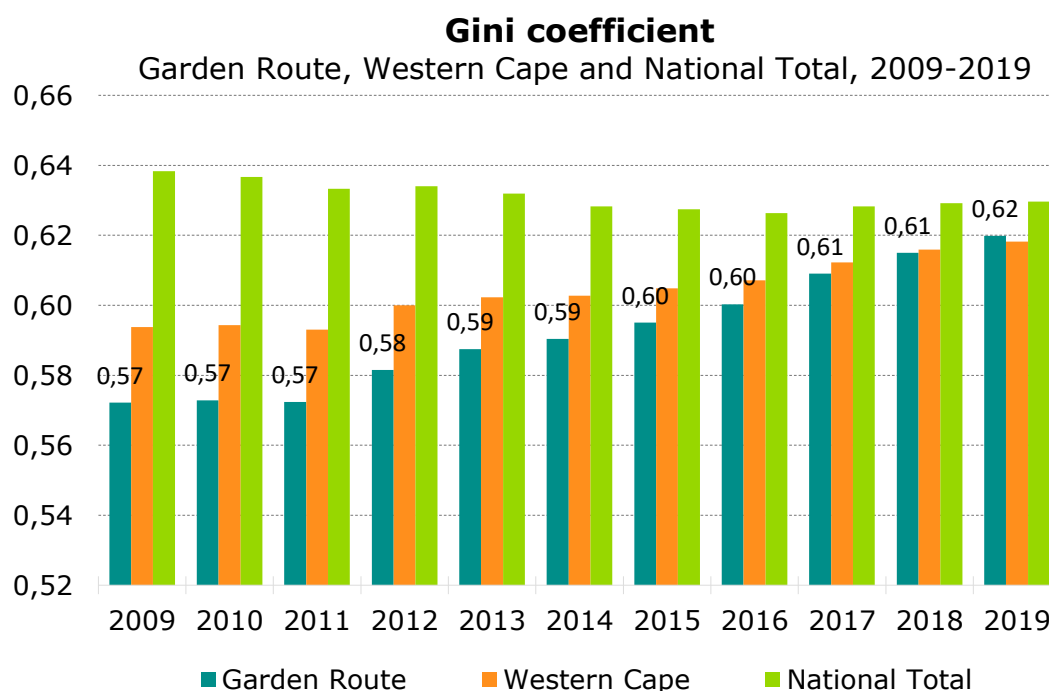
enables the consumption of both food and essential non-food items, but requires that individuals sacrifice some food items in order to obtain the non-food items.).

This is better than the South African rate of 44%, but worse than the Western Cape rate of 31.7%. Because of the poverty levels in the district, there is a cumulative total of 161 277 grant dependents in the district as depicted in the table below:

GRANT TYPE	TOTAL NO OF BENEFICIARIES
Care Dependency Grant	1 825
Child Support Grant	79 351
War veteran	2
Disability Grant	22 218
Foster Care Grant	2 984
Grant-In-Aid	7 098
Old Age Grant	47 799
GRAND TOTAL	161 277

3.3.2 Inequality

In 2019, the Gini coefficient in Garden Route District Municipality was at 0.62, which reflects an increase in the number over the ten-year period from 2009 to 2019. The Western Cape Province and South Africa had a Gini coefficient of 0.618 and 0.63 respectively.



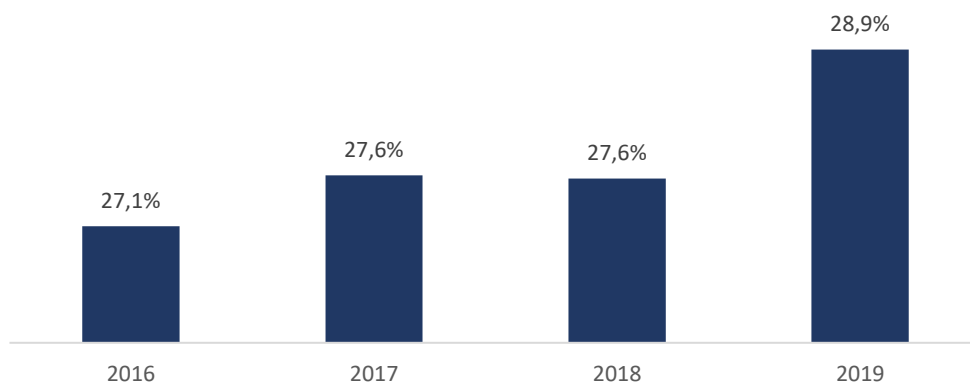
3.3.3. Employment/Unemployment

The table below indicates the number of people employed in both the formal and informal sector in the Garden Route District Municipality in relation to other districts in the province, the Western Cape province and at a national level.

	Total Employment (Formal + Informal)
National Total	16 384 977
Western Cape	2 532 616
DC01 West Coast	166 920
DC02 Cape Winelands	355 089
DC03 Overberg	108 041
DC04 Garden Route (Eden)	206 113
DC05 Central Karoo	24 513

Unemployment remains a key challenge for the Garden Route District area, with rising population numbers. Up-skilling of the labour force, implementation of levers such as local economic development strategies are all key in order to increase potential employment opportunities and boost economic growth in the area. As depicted in the table below, the unemployment rate increased significantly with 1,3% from 27, 6% in 2018 to 28.9% in 2019 compared to the previous three year 0,5% increase from 2016 to 2018 from 27,1% to 27,6%

Garden Route Unemployment 2016 - 2019

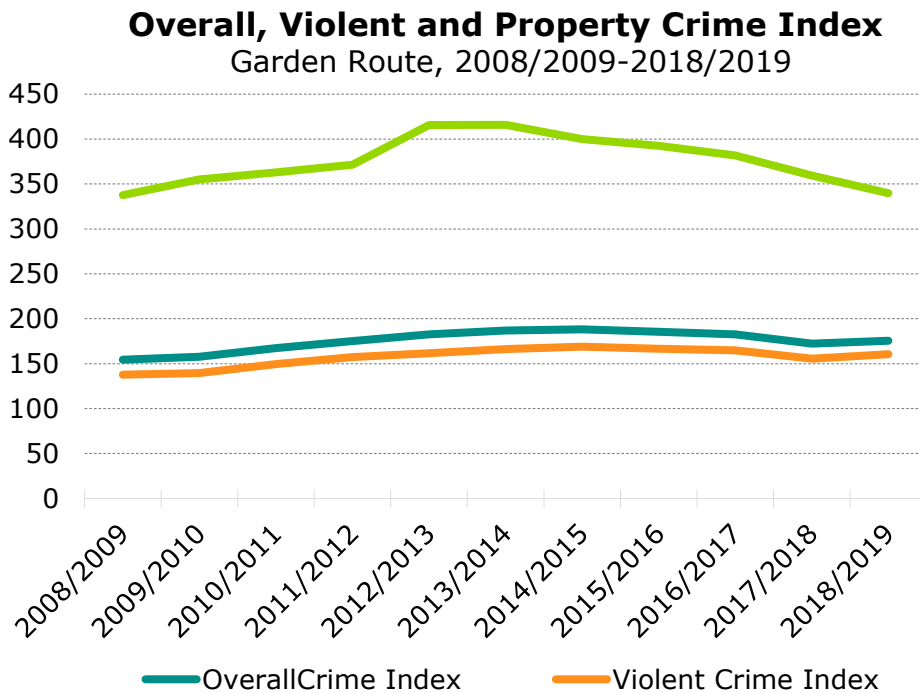


The table below indicates the unemployment rate in the Garden Route District Municipality in relation to other districts in the province, the Western Cape province and the national unemployment rate.

	Unemployment Rate (2019)
National Total	28,2%
Western Cape	20,5%
DC01 West Coast	18,9%
DC02 Cape Winelands	17,2%
DC03 Overberg	21,0%
DC04 Garden Route (Eden)	28,9%
DC05 Central Karoo	20,7%

3.4 Crime

The crime index² is a composite, weighted index which measures crime. The higher the index number, the higher the level of crime for that specific year in a particular region. The index is best used by looking at the change over time or comparing the crime levels across regions.



For the period 2008/2009 to 2018/2019 overall crime has increased at an average annual rate of 1.28% within the Garden Route District Municipality. Violent crime increased by 1.54% since 2008/2009, while property crimes increased by 0.06% between the 2008/2009 and 2018/2019 financial years.

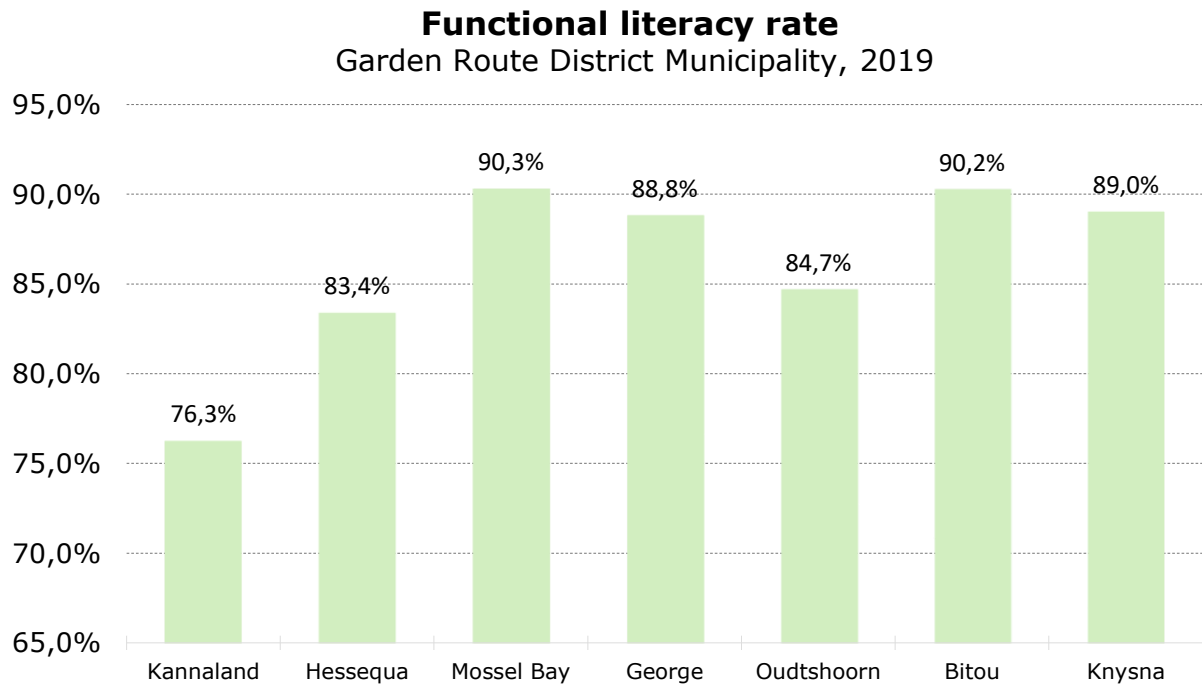
Property crimes, i.e. crimes such as arson, malicious damage to property, burglary at residential premises, burglary at business premises, theft of motor vehicle and motorcycle, theft out of or from motor vehicle, stock-theft, illegal possession of firearms and ammunition, drug-related crime, and shoplifting are a major problem in the District.

3.5 Education and Skills

A total of 435 000 individuals in Garden Route District Municipality were considered functionally literate in 2019, while 61 400 people were considered to be illiterate. Expressed as a rate, this amounts to 87.63% of the population, which is an increase

² IHS Markit Regional eXplorer

of 0.044 percentage points since 2009 (83.23%). The number of illiterate individuals decreased on average by -0.84% annually from 2009 to 2019, with the number of functional literate people increasing at 2.75% annually. Garden Route District Municipality's functional literacy rate of 87.63% in 2019 is lower than that of Western Cape at 90.84%. The literacy rates in the different local municipalities varied significantly as illustrated below:



Source: IHS Markit Regional eXplorer version 1946

The number of people without any schooling in Garden Route District Municipality accounts for 12.94% of the number of people without schooling in the province and a total share of 0.49% of the national. In 2019, the number of people in Garden Route District Municipality with a matric only was 141,000 which is a share of 9.89% of the province's total number of people that has obtained a matric.

**“THE NUMBER OF ILLITERATE INDIVIDUALS
DECREASED ON AVERAGE BY -0.84% ANNUALLY
FROM 2009 TO 2019, WITH THE NUMBER
OF FUNCTIONAL LITERATE PEOPLE INCREASING
AT 2.75% ANNUALLY.”**

4. Drivers of the Economy

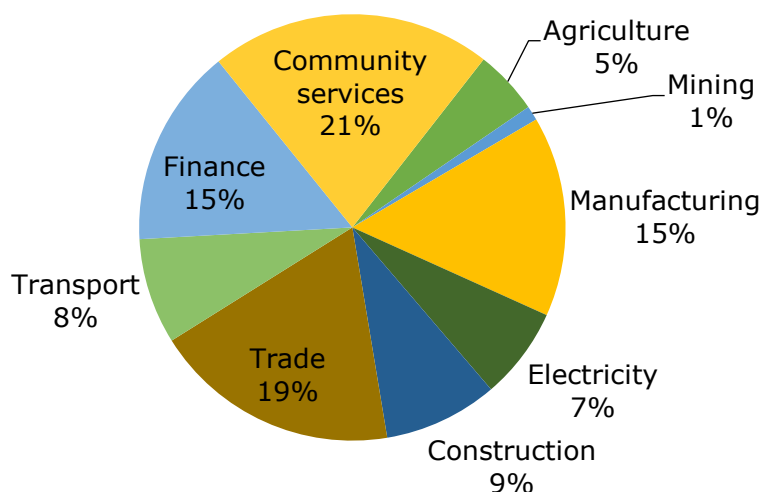
With a GDP of R 60.8 billion in 2019 (up from R 30.9 billion in 2009), the Garden Route District Municipality contributed 8.83% to the Western Cape Province GDP of R 688 billion in 2019. In 2019, the Garden Route District Municipality achieved an annual growth rate of 0.69% which is a slightly higher GDP growth than the Western Cape Province's 0.32%, and is higher than that of South Africa, where the 2019 GDP growth rate was 0.15%.

Contrary to the short-term growth rate of 2019, the longer-term average growth rate for Garden Route (1.21%) is slightly lower than that of South Africa (1.68%). The greatest contributor to the Garden Route District Municipality economy is the George Local Municipality with a share of 31.58% or R 19.2 billion, increasing from R 10.3 billion in 2009. The economy with the lowest contribution is the Kannaland Local Municipality with R 2.56 billion growing from R 1.2 billion in 2009.

4.1 Structure of the Economy

In 2019, the community services sector is the largest within Garden Route District Municipality accounting for R 11.7 billion or 21.4% of the total GVA in the district municipality's economy. The sector that contributes the second most to the GVA of the Garden Route District Municipality is the trade sector at 18.7%, followed by the manufacturing sector with 15.2%. The sector that contributes the least to the economy of the District Municipality is the mining sector with a contribution of R 601 million or 1.10% of the total GVA. George Local Municipality contributed R 17.3 billion or 31.66% to the GVA of the Garden Route District Municipality, making it the largest contributor to the overall GVA of the Garden Route District Municipality.

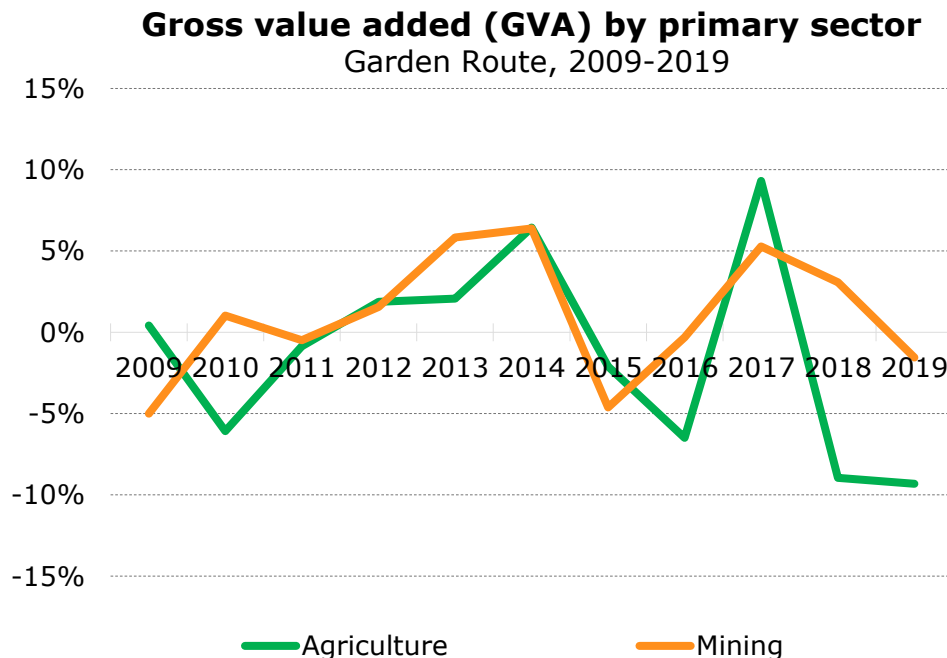
Gross Value Added (GVA) by broad economic sector
Garden Route District Municipality, 2019



Source: IHS Markit Regional eXplorer version 1946

4.2 Primary Sector

The primary sector consists of two broad economic sectors namely the mining and the agricultural sector. The following chart represents the average growth rate in the GVA for both sectors in Garden Route District Municipality from 2009 to 2019.



Source: IHS Markit Regional eXplorer version 1946

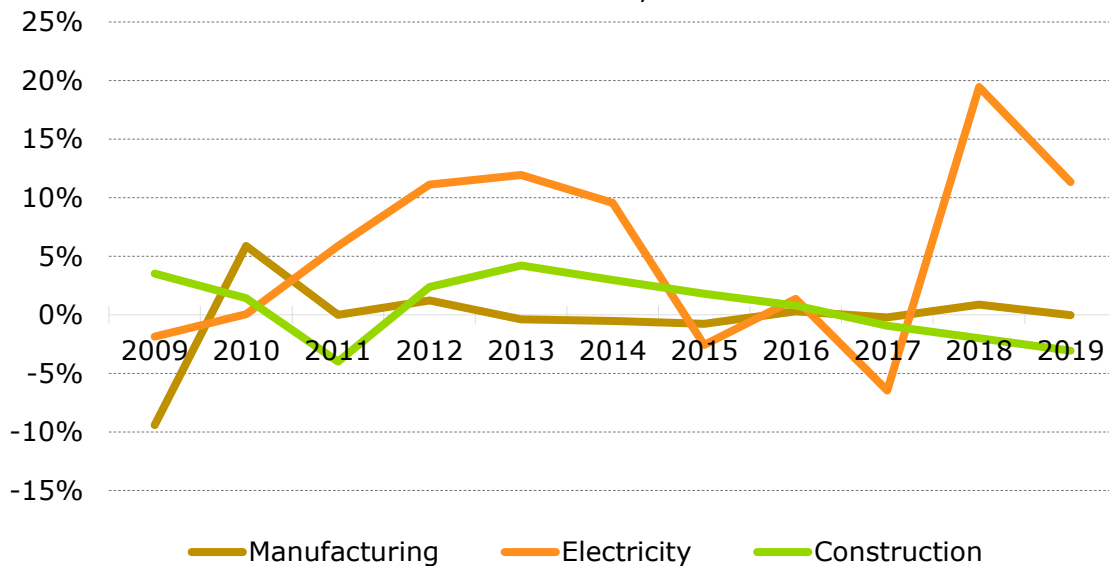
Between 2009 and 2019, the agriculture sector experienced the highest positive growth in 2017 with an average growth rate of 9.3%. The mining sector reached its highest point of growth of 6.4% in 2014. The agricultural sector experienced the lowest growth for the period during 2019 at -9.3%, while the mining sector reaching its lowest point of growth in 2009 at -5.0%. Both the agriculture and mining sectors are generally characterised by volatility in growth over the period.

4.3 Secondary Sector

The secondary sector consists of three broad economic sectors namely the manufacturing, electricity and the construction sector. The following chart represents the average growth rates in the GVA for these sectors in Garden Route District Municipality from 2009 to 2019.

Gross value added (GVA) by secondary sector

Garden Route, 2009-2019



Source: IHS Markit Regional eXplorer version 1946

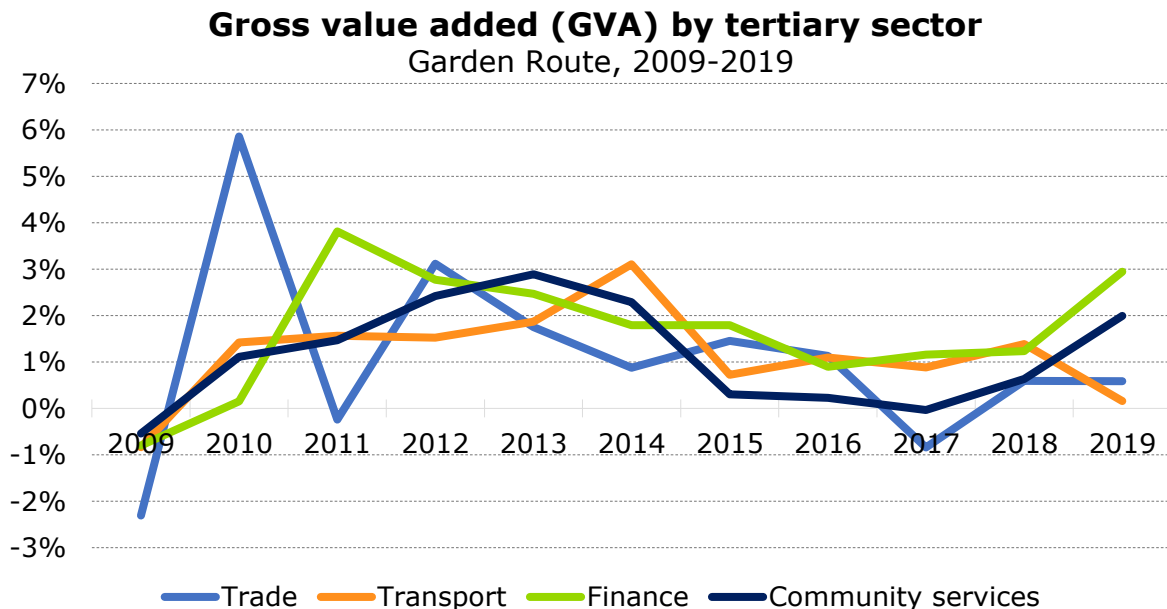
Between 2009 and 2019, the manufacturing sector experienced the highest positive growth in 2010 with a growth rate of 5.9%. The construction sector reached its highest growth in 2013 at 4.2%. The manufacturing sector experienced its lowest growth in 2011 of -9.4%, while construction sector reached its lowest point of growth in 2011 with a -4.0% growth rate. The electricity sector experienced the highest growth in 2018 at 19.4%, while it recorded the lowest growth of -6.5% in 2017.

Mossel Bay has the largest manufacturing sector in the district, this includes PetroSA's industry but also the food and beverage processing industry. Mossel Bay also has a noticeably large construction sector that contributed 11 per cent to its GDP. Forestry and timber are a traditional source of economic value in the district. However, there are a number of challenges related to the industry, such as Withdrawal of forestry industry due to National issues with water consumption and sale or transfer of previous Forestry lands for new purposes.

“MOSSSEL BAY HAS THE LARGEST MANUFACTURING SECTOR IN THE DISTRICT, THIS INCLUDES PETROSA’S INDUSTRY BUT ALSO THE FOOD AND BEVERAGE PROCESSING INDUSTRY.”

4.4 Tertiary sector

The tertiary sector consists of four broad economic sectors namely the trade, transport, finance and the community services sector. The following chart represents the average growth rates in the GVA for these sectors in Garden Route District Municipality from 2009 to 2019.



The trade sector experienced the highest positive growth in 2010 with a growth rate of 5.9%. The transport sector reached its highest point of growth in 2014 at 3.1%. The finance sector experienced the highest growth rate in 2011 when it grew by 3.8% and recorded the lowest growth rate in 2009 at -0.8%. The Trade sector also had the lowest growth rate in 2009 at -2.3%. The community services sector, which largely consists of government, experienced its highest positive growth in 2013 with 2.9% and the lowest growth rate in 2009 with -0.5%.

The district's profound natural, scenic and landscape beauty contributes to its appeal as a popular tourism destination. Tourism plays a key role in the economy of the district, which is linked to the retail, wholesale, catering and accommodation sector. In Garden Route District Municipality, the Leisure / Holiday, relative to the other tourism, recorded the highest average annual growth rate from 2009 (430 000) to 2019 (469 000) at 0.88%. The type of tourism with the highest volume of tourists was also the Leisure / Holiday tourism with a total number of 469 000 annual tourist and had an average annual growth rate of 0.88%. The tourism type that recorded the lowest growth was Other (Medical, Religious, etc) tourism with an average annual growth rate of -6.73% from 2009 (50 400) to 2019 (25 100).

The number of trips by tourists visiting Garden Route District Municipality from other regions in South Africa has decreased at an average annual rate of -2.35% from

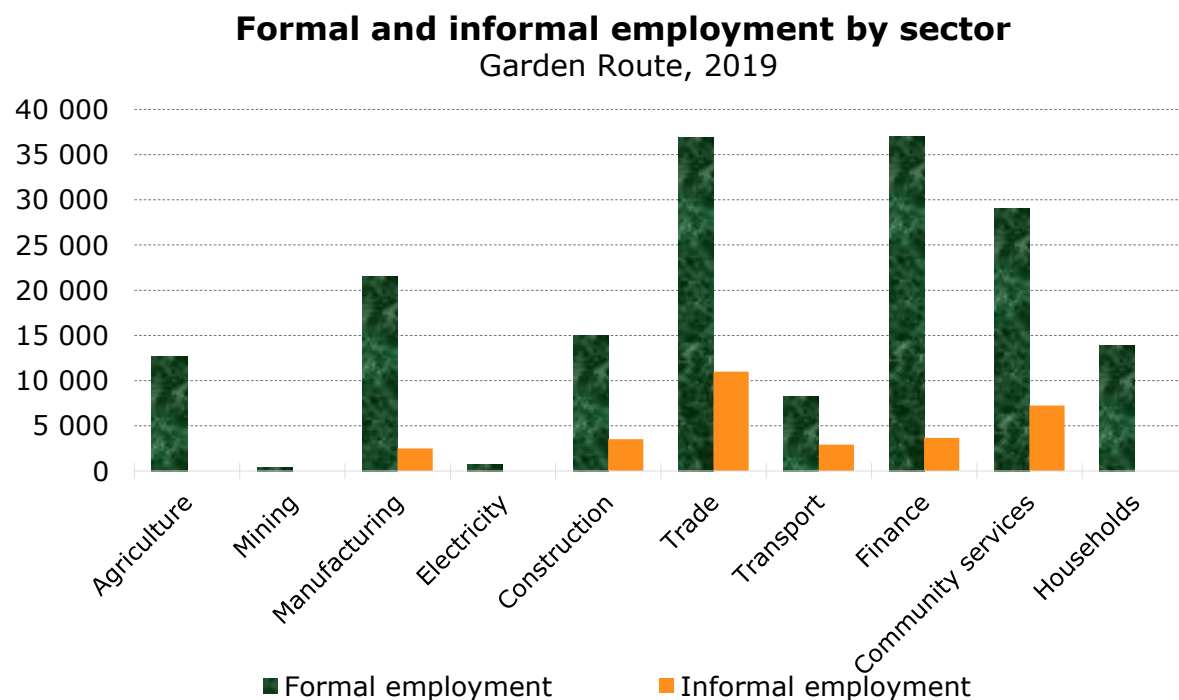
2009 (792 000) to 2019 (624 000). The tourists visiting from other countries decreased at an average annual growth rate of 3.16% (from 208 000 in 2009 to 285 000). International tourists constitute 31.33% of the total number of trips, with domestic tourism representing the balance of 68.67%.

4.5 Informal Sector

The informal sector is vital for the areas with very high unemployment and very low labour participation rates. Unemployed people see participating in the informal sector as a survival strategy. In 2019, the number of people employed in the informal sector counted 30 800 or 14.94% of the total employment. Informal employment in Garden Route increased from 21 400 in 2009 to an estimated 30 800 in 2019.

In 2019 the Trade sector recorded the highest number of informally employed, with a total of 11 000 employees or 35.64% of the total informal employment. This can be expected as the barriers to enter the Trade sector in terms of capital and skills required is less than with most of the other sectors. The Manufacturing sector has the lowest informal employment with 2 490 and only contributes 8.07% to the total.

**“THE INFORMAL SECTOR IS VITAL FOR
THE AREAS WITH VERY HIGH UNEMPLOYMENT AND
VERY LOW LABOUR PARTICIPATION RATES.”**



Source: IHS Markit Regional eXplorer version 1946

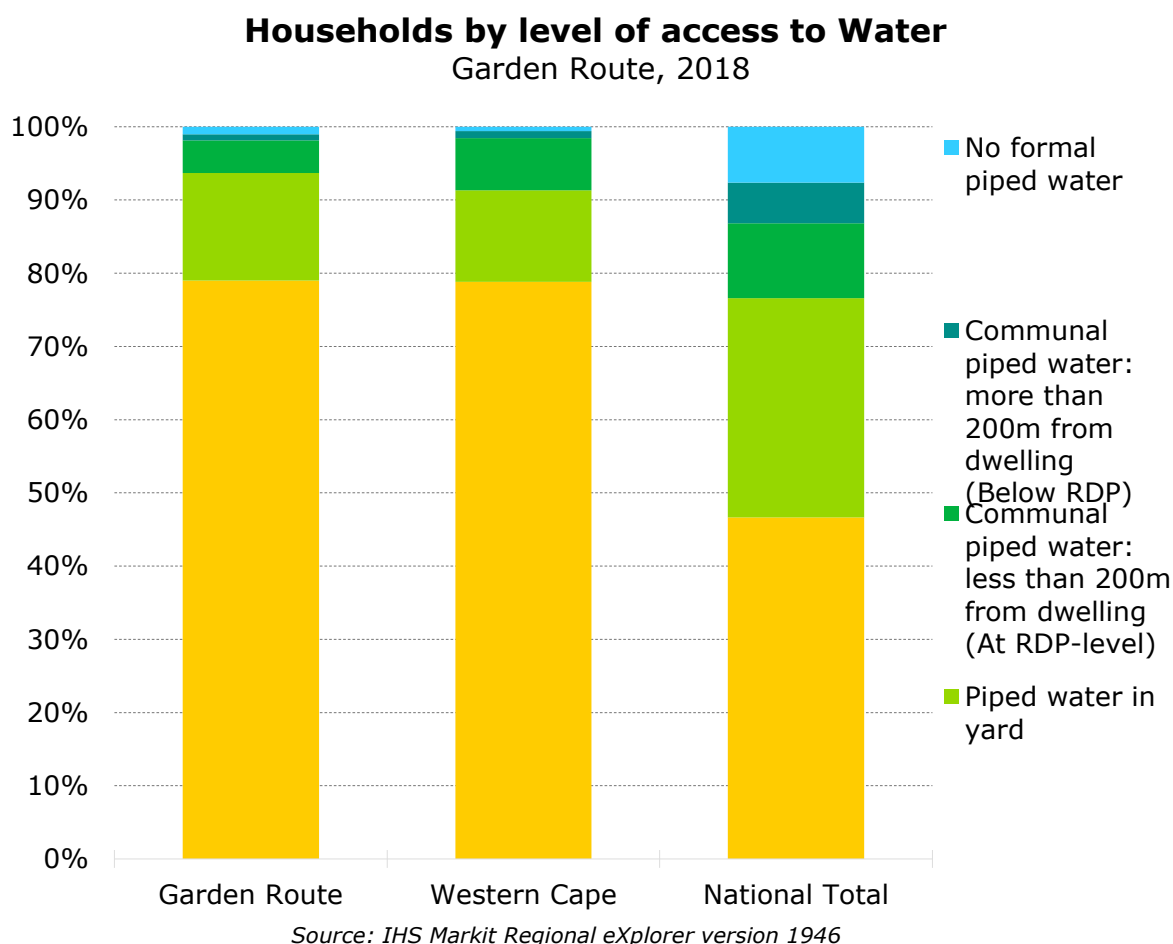


Knysna Forest

5. Service Delivery

5.1 Water and Sanitation

In 2018, Garden Route District Municipality had a total number of 153 000 (or 79.00%) households with piped water inside the dwelling, a total of 28 400 (14.67%) had piped water inside the yard and a total number of 1 980 (1.02%) households had no formal piped water.



The region within Garden Route District Municipality with the highest number of households with piped water inside the dwelling is George Local Municipality with 51 400 or a share of 33.70%. The region with the lowest number of households with piped water inside the dwelling is Kannaland Local Municipality with a total of 5 760 or a share of 3.77%.

**“THE REGION WITH THE HIGHEST NUMBER
OF HOUSEHOLDS WITH PIPED WATER INSIDE THE
DWELLING IS GEORGE LOCAL MUNICIPALITY WITH
51 400 OR A SHARE OF 33.70%”**

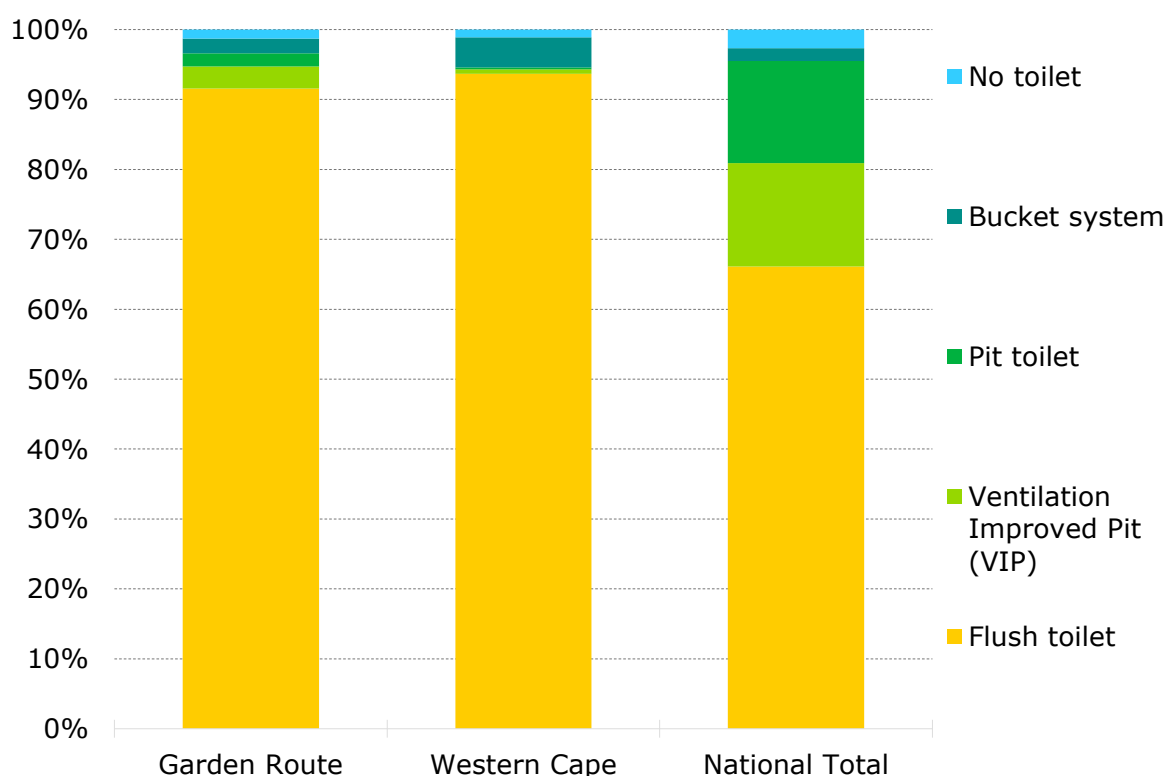
TABLE HOUSEHOLDS BY TYPE OF WATER ACCESS - GARDEN ROUTE DISTRICT MUNICIPALITY, 2018 [NUMBER]

	Piped water inside dwelling	Piped water in yard	Communal piped water: less than 200m from dwelling (At RDP-level)	Communal piped water: more than 200m from dwelling (Below RDP)	No formal piped water	Total
Kannaland	5,759	564	78	16	187	6,604
Hessequa	16,015	1,492	258	6	331	18,101
Mossel Bay	27,858	3,141	1,181	318	227	32,724
George	51,450	8,865	1,863	348	394	62,920
Oudtshoorn	17,394	6,325	1,041	198	377	25,334
Bitou	14,124	5,024	1,807	397	299	21,650
Knysna	20,053	2,945	2,388	356	166	25,908
Total Garden Route	152,652	28,355	8,616	1,640	1,979	193,242

Source: IHS Markit Regional eXplorer version 1946

Garden Route District Municipality had a total number of 177 000 flush toilets (91.57% of total households), 6 070 Ventilation Improved Pit (VIP) (3.14% of total households) and 3 620 (1.87%) of total household pit toilets.

Households by type of Toilet
Garden Route, 2018



Source: IHS Markit Regional eXplorer version 1946

The region within Garden Route with the highest number of flush toilets is George Local Municipality with 59 300 or a share of 33.51% of the flush toilets within Garden Route. The region with the lowest number of flush toilets is Kannaland Local Municipality with a total of 5 060 or a share of 2.86% of the total flush toilets within Garden Route District Municipality.

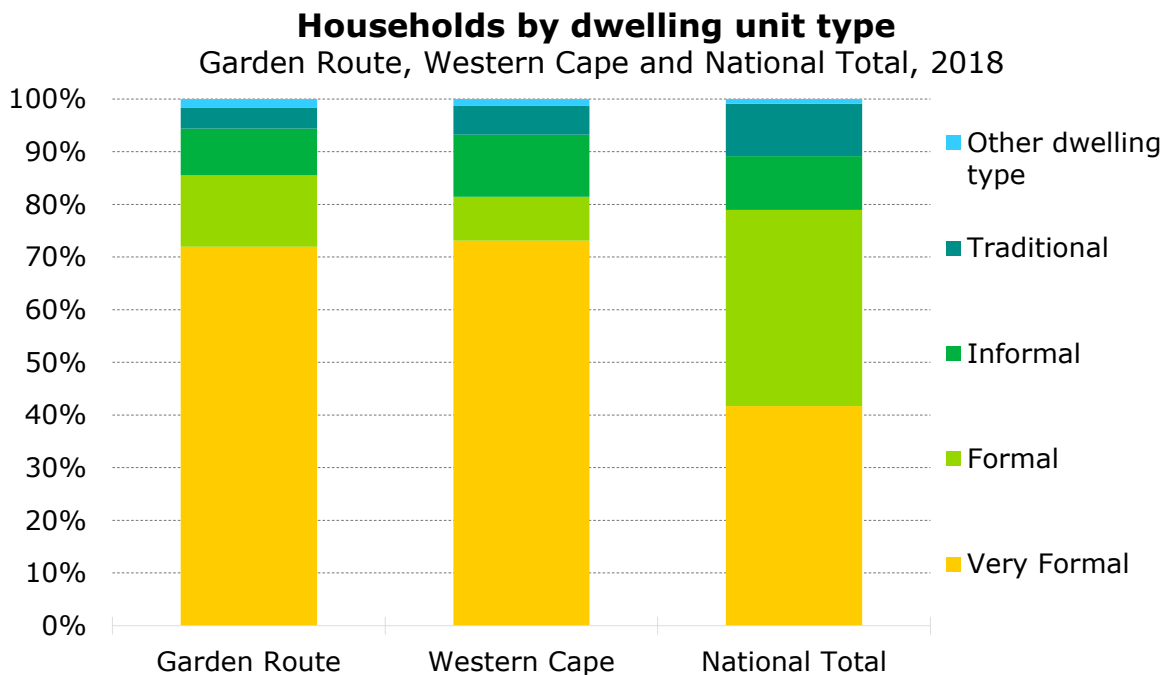
TABLE HOUSEHOLDS BY TYPE OF SANITATION - KANNALAND, HESSEQUA, MOSSEL BAY, GEORGE, OUDTSHOORN, BITOU AND KNYSNA LOCAL MUNICIPALITIES, 2018 [NUMBER]

	Flush toilet	Ventilation Improved Pit (VIP)	Pit toilet	Bucket system	No toilet	Total
Kannaland	5,055	1,099	208	150	92	6,604
Hessequa	17,094	626	155	113	113	18,101
Mossel Bay	30,951	349	163	805	456	32,724
George	59,294	840	431	1,541	813	62,920
Oudtshoorn	20,757	2,285	954	953	385	25,334
Bitou	19,916	710	722	75	227	21,650
Knysna	23,892	162	989	452	414	25,908
Total Garden Route	176,959	6,071	3,623	4,088	2,501	193,242

Source: IHS Markit Regional eXplorer version 1946

5.2 Human Settlements

Garden Route District Municipality had a total number of 139 000 (71.97% of total households) very formal³ dwelling units, a total of 26 200 (13.57% of total households) formal dwelling units and a total number of 17 100 (8.83% of total households) informal dwelling units.



Source: IHS Markit Regional eXplorer version 1946

The region within the Garden Route District Municipality with the highest number of very formal dwelling units is the George Local Municipality with 45 100 or a share of 32.45% of the total very formal dwelling units within Garden Route District Municipality. The region with the lowest number of very formal dwelling units is the Kannaland Local Municipality with a total of 4 980 or a share of 3.58% of the total very formal dwelling units within Garden Route District Municipality.

³ Structures built according to approved plans, e.g. houses on a separate stand, flats or apartments, townhouses, rooms in backyards that also have running water and flush toilets within the dwelling vs Formal which are without the services

TABLE HOUSEHOLDS BY DWELLING UNIT TYPE - KANNALAND, HESSEQUA, MOSSEL BAY, GEORGE, OUDTSHOORN, BITOU AND KNYSNA LOCAL MUNICIPALITIES, 2018 [NUMBER]

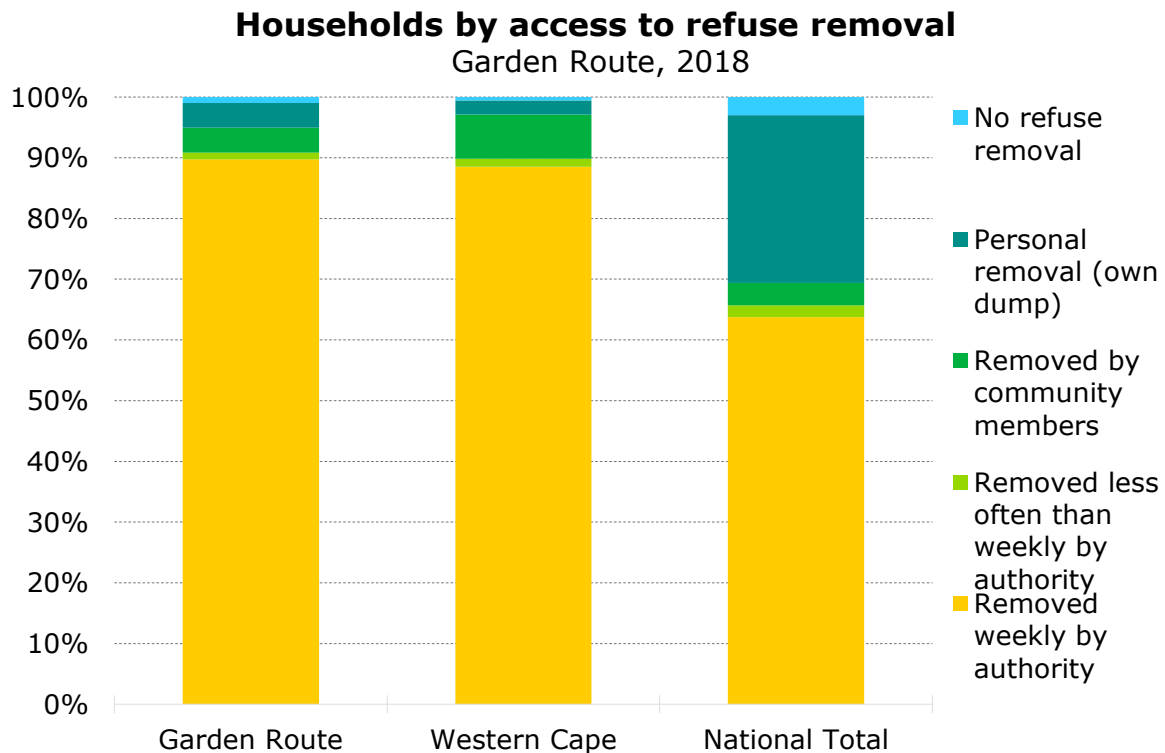
	Very Formal	Formal	Informal	Traditional	Other dwelling type	Total
Kannaland	4,979	1,362	107	53	102	6,604
Hessequa	14,504	2,356	807	142	291	18,101
Mossel Bay	25,257	3,250	2,667	1,119	430	32,724
George	45,137	8,843	5,203	2,873	864	62,920
Oudtshoorn	18,372	4,475	1,563	664	260	25,334
Bitou	12,408	3,962	3,190	1,528	562	21,650
Knysna	18,419	1,976	3,518	1,471	524	25,908
Total Garden Route	139,077	26,225	17,056	7,850	3,034	193,242

Source: IHS Markit Regional eXplorer version 1946

5.3 Waste Management

In 2018, Garden Route District Municipality had a total number of 174 000 (89.76%) households which had their refuse removed weekly by the authority, a total of 2 090 (1.08%) households had their refuse removed less often than weekly by the authority and a total number of 7 830 (4.05%) households which had to remove their refuse personally (own dump).

In 2008 the households with no formal refuse removal in Garden Route District Municipality was 16 900, this increased annually at 0.46% per annum to 17 700 in 2018. The total number of households within Garden Route District Municipality increased at an average annual rate of 2.43% from 2008 to 2018, which is higher than the annual increase of 2.13% in the number of households in South Africa. With high in-migration into a region, the number of households increases, putting additional strain on household infrastructure.



Source: IHS Markit Regional eXplorer version 1946

The region within Garden Route with the highest number of households where the refuse is removed weekly by the authority is George Local Municipality with 59 400 or a share of 34.24% of the households where the refuse is removed weekly by the authority within Garden Route. The region with the lowest number of households where the refuse is removed weekly by the authority is Kannaland Local Municipality with a total of 5 050 or a share of 2.91% of the total households where the refuse is removed weekly by the authority within the district municipality.

TABLE HOUSEHOLDS BY REFUSE DISPOSAL - KANNALAND, HESSEQUA, MOSSEL BAY, GEORGE, OUDTSHOORN, BITOU AND KNYSNA LOCAL MUNICIPALITIES, 2018 [NUMBER]

	Removed weekly by authority	Removed less often than weekly by authority	Removed by community members	Personal removal (own dump)	No refuse removal	Total
Kannaland	5,046	130	350	929	148	6,604
Hessequa	14,747	115	1,612	1,525	101	18,101
Mossel Bay	30,447	352	871	563	492	32,724
George	59,392	630	1,040	1,391	466	62,920
Oudtshoorn	19,985	468	2,036	2,370	475	25,334
Bitou	19,317	140	1,370	742	81	21,650
Knysna	24,517	258	697	311	126	25,908
Total Garden Route	173,452	2,093	7,976	7,831	1,889	193,242

Source: IHS Markit Regional eXplorer version 1946

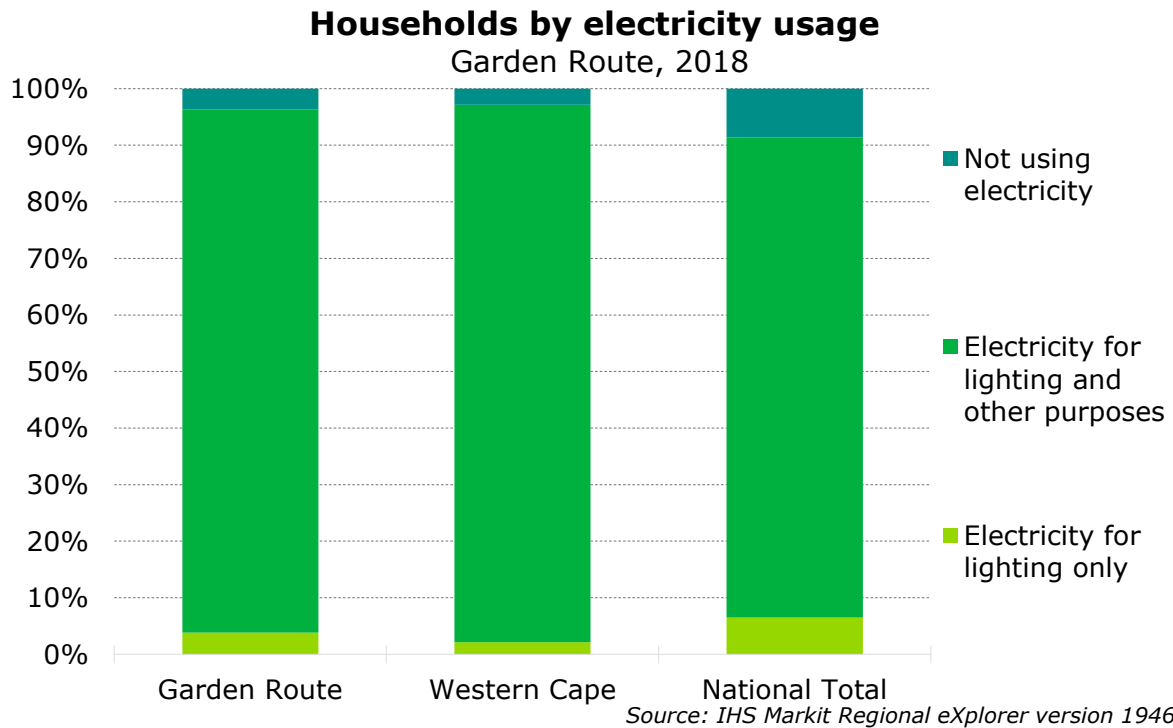
“ACCORDING TO THE AGREEMENT WITH PROVINCIAL GOVERNMENT, A MINIMUM OF 10 000KM GRAVEL ROAD SURFACE MUST BE GRADED ANNUALLY.”

5.4 Roads and Transport

The Garden Route District Municipality Road Agency services an area of approximately 47 000 km². The area is divided into 15 wards that are serviced by 16 maintenance grader operators. According to the agreement with Provincial Government, a minimum of 10 000km gravel road surface must be graded annually. Where needed, re-graveling projects are undertaken and it is the Road Agency's responsibility to rehabilitate the quarries where the gravel is sourced from. Each ward also has one maintenance team.

5.5 Electricity

Garden Route District Municipality had a total number of 7 420 (3.84%) households with electricity for lighting only, a total of 179 000 (92.47%) households had electricity for lighting and other purposes and a total number of 7 130 (3.69%) households did not use electricity.



The region within Garden Route with the highest number of households with electricity for lighting and other purposes is George Local Municipality with 59 000 or a share of 33.04% of the households with electricity for lighting and other purposes within Garden Route District Municipality. The Region with the lowest number of households with electricity for lighting and other purposes is Kannaland Local Municipality with a total of 6 010 or a share of 3.36% of the total households with electricity for lighting and other purposes within Garden Route District Municipality.

**“THE REGION WITH THE LOWEST NUMBER OF
HOUSEHOLDS WITH ELECTRICITY IS KANNALAND
LOCAL MUNICIPALITY”**

TABLE . HOUSEHOLDS BY TYPE OF ELECTRICAL CONNECTION - KANNALAND, HESSEQUA, MOSSEL BAY, GEORGE, OUDTSHOORN, BITOU AND KNYSNA LOCAL MUNICIPALITIES, 2018 [NUMBER]

	Electricity for lighting only	Electricity for lighting and other purposes	Not using electricity	Total
Kannaland	254	6,008	342	6,604
Hessequa	904	16,937	259	18,101
Mossel Bay	716	30,823	1,185	32,724
George	1,789	59,045	2,086	62,920
Oudtshoorn	1,902	21,485	1,947	25,334
Bitou	960	20,415	276	21,650
Knysna	895	23,976	1,037	25,908
Total Garden Route	7,421	178,690	7,131	193,242

Source: IHS Markit Regional eXplorer version 1946

6. Governance and Management

6.1 Municipal Performance

The five-year trend of Audit Outcomes for the District, is depicted below:

Municipality	Audit opinions				
	2018-19	2017-18	2016-17	2015-16	2014-15
Kannaland	Audit not finalised at legislated date	Unqualified with findings	Qualified	Disclaimer	Unqualified with findings
Hessequa	Unqualified with no findings	Unqualified with no findings	Unqualified with no findings	Unqualified with no findings	Unqualified with no findings
Mossel Bay	Unqualified with findings	Unqualified with findings	Unqualified with no findings	Unqualified with no findings	Unqualified with no findings
George	Unqualified with findings	Qualified	Unqualified with no findings	Unqualified with no findings	Unqualified with no findings
Oudtshoorn	Unqualified with findings	Qualified	Qualified	Qualified	Adverse
Bitou	Unqualified with findings	Unqualified with findings	Unqualified with findings	Unqualified with no findings	Unqualified with no findings
Knysna	Unqualified with findings	Unqualified with findings	Unqualified with findings	Unqualified with no findings	Unqualified with no findings
Garden Route (Eden)	Unqualified with findings	Unqualified with findings	Unqualified with findings	Unqualified with no findings	Unqualified with no findings

George and Oudtshoorn improved their audit outcomes. Kannaland's audit outcomes were not finalised by the legislated date. With regard to Kannaland, the Auditor-General remarked that there is a lack of oversight due to instability in the political and administrative positions. Key positions such as those of the chief financial officer and the supply chain management manager have not been filled permanently, with different employees acting in these positions. The instability has not allowed for a culture of good governance to be developed, which contributed to action plans not being developed, implemented or monitored to address all the prior year audit findings and previously reported internal control deficiencies.

Kannaland Municipality is the only municipality in the Province under Administration in terms of Section 139 (5) of the Constitution, following a Cabinet decision in December 2018. The Municipality still faces significant challenges such as financial viability, human resources management and service delivery.

**“ACCORDING TO THE MUNICIPAL REPORTING TO THE
STATSSA NON-FINANCIAL CENSUS, THE VACANCY RATE
IN THE DISTRICT AND ITS MUNICIPALITIES INCREASED
FROM 11.5% IN 2017 TO 14.1% IN 2018.”**

6.2 Municipal Capacity

The District Municipality and other local municipalities enjoy a full senior management compliment with the position of Municipal Manager, Chief Financial Officer, Director Technical Services and Corporate Services filled – with all appointments supported by the MEC for Local Government, Environmental Affairs and Development Planning. This largely contributes to the governance and service delivery stability in the Garden Route Region. According to the municipal reporting to the StatsSA non-financial census, the vacancy rate in the District and its municipalities increased from 11.5% in 2017 to 14.1% in 2018.

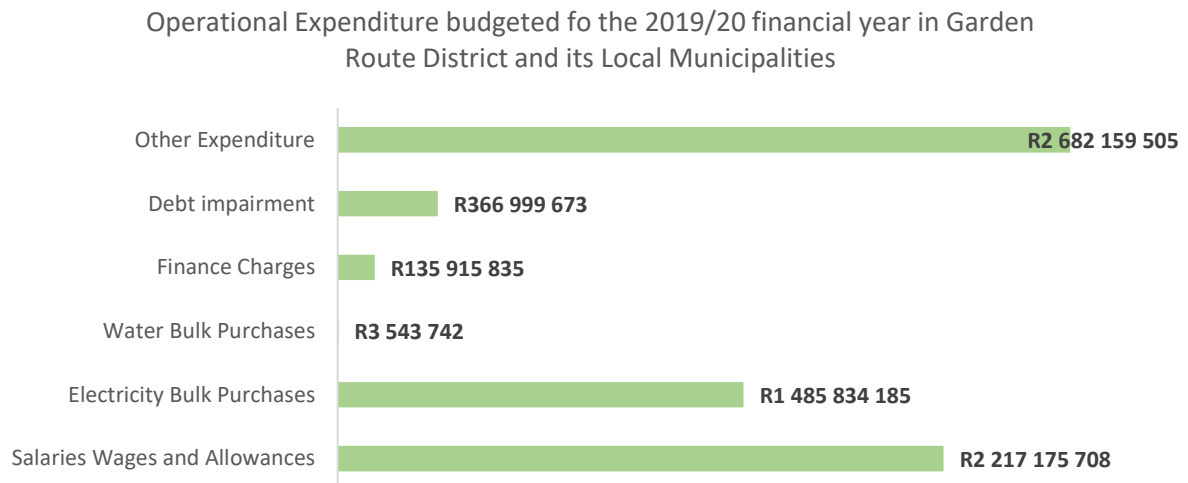
Although the post of Director: Technical Services has been re-advertised, for the Oudtshoorn Municipality, the administrative capability is of concern. The posts of Director: Human Settlements, Director Technical Services and Director: Strategic Services are still vacant, thus leaving a huge leadership vacuum within the Municipality. Due to the strained interface between the Municipal Manager and the Executive Mayor, the political instability and the current vacancy rate in the Municipality, there is a concern that this poses increasing risks which may affect the proper functioning of the Municipality⁴.

The appointment of the Municipal Manager is under review in Bitou Municipality. A forensic investigation preceded a Section 106 Investigation by the Department of Local Government (DLG) which was subsequently completed following allegations of fraud and corruption and maladministration. The stability within the leadership of the George Municipality is of concern, as the absence of a Chief Financial Officer and Director: Electro-Technical Services adds to the concern and potential risks to the Municipality. Furthermore, the previous CFO was dismissed and has instituted an arbitration case against the Municipality.

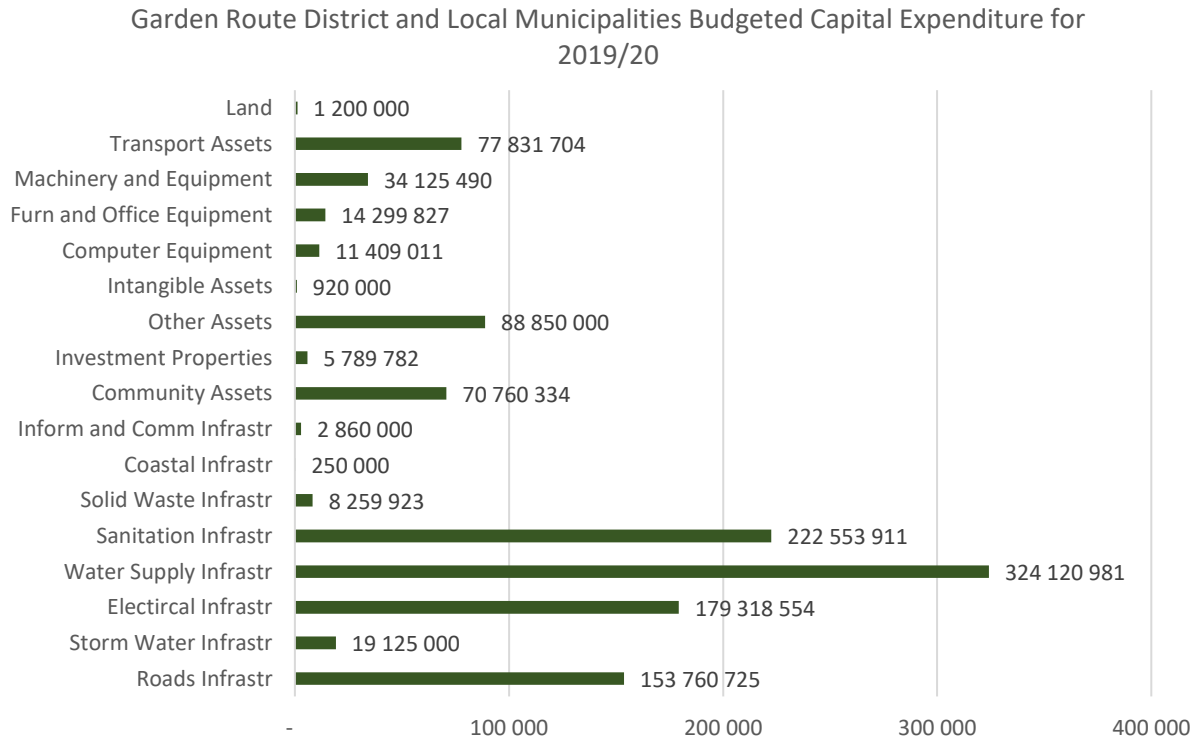
⁴ Western Cape Province. Department of Local Government. 2020. Garden Route District Profile.

The Western Cape Department of Local Government is attending to concerns about the legal basis on which additional and scarce skills allowances were granted to senior managers Knysna Municipality.

The District has a total operational budget of R6 891 629 000 for which the planned expenditure is illustrated below:



The total capital budget is R 1 215 435 242 for which the planned expenditure is illustrated below:



6.3 Traditional Affairs Governance

There are no Traditional Leaders in the Eden District.

7. Projects to diversify and grow people and the Economy

The stagnation in the economic growth of the district remains a risk, but the materialization of the district fresh produce market is expected to bring change in the economic development of the district. The implementation of the growth and development strategy will also assist in ensuring private and public partnership towards augmenting economic development of the district. All these initiatives will be implemented in the 2020/2021 financial year.

7.1 Social Development Projects

Given the decrease in semi-skilled and unskilled sectors (such as agriculture, Forestry and fisheries), there is a need to ensure the population of the region is up-skilled to ensure that they are able to access the growth opportunities that exist within the region.

Establishment of a Development Agency for the region

Development Agencies are particularly suited to the achievement of the objectives of socio-economic development and growth in the post democracy South Africa context, insofar as they allow for the provision of infrastructure, economic growth and security for investments in the region and the country at large. Additionally, when undertaken in the framework of implementing projects in Public-Private Partnerships, they could enlist the financial and managerial capabilities of the private sector in widening the scope of productive activity in the region.

7.2 Spatial Development

The composite Spatial Development Framework (SDF) for Garden Route District brings together the spatial strategies and policies and depicts the spatial intentions for the municipality. It is necessary to capitalise on the town of George as an emerging 'regional node' as outlined in the PSDF and re- brand the Garden Route District as part of the Garden Route and enhance support to South Cape Economic Partnership

The environmental aspect of Garden route is of an importance as it consist of diverse wilderness, agricultural landscapes, estuaries and lagoons mountain backdrops and coastal settings including the verdant landscapes of the coastal belt. The District is also a host of formally and informally conserved areas which include National Parks, Provincial Nature Reserves, Protected Areas, Marine Protected Areas, World Heritage sites (Swartburg nature reserve) Biosphere reserves, and RAMSAR sites.

However, the environmental aspect is under stress as a result of demand for to cater of population growth, that is perceived to bring about economic return. Poor land use that resulted in land erosion, infestation of invasive alien plants that increase chances of veld fires, unsustainable extraction of resources and the social, economic and financial undervalue of diversity are adding to the environmental stress.



Source: Garden Route SDF, November 2017

Garden Route has an extensive transport distribution network including national road, provincial and local road networks, airport, as well as several landing strips and small craft harbours. The network accessibility provides an opportunity for Garden Route to interact nationwide. The N2 and R62 has been identified as major corridors traversing the District in an east-west direction. They serve as major distributors of people, goods and services to the rest of the country. N9 and N12 serves as the key routes from the District to the northern part of the country.

7.2.1 Infrastructure Projects

Key service delivery projects as reflected in the Top Layer Service Delivery Budget implementation Plan include the following:

- Reseal 31.24 km of roads by 30 June 2021
- Regravel 32.73 km of roads by 30 June 2021

7.2.2 Economic Projects

It is necessary to consider an economic development strategy that ensures that the settlements work in collaboration to grow their niche industries and entrench complementarity between settlements.

Key economic projects as reflected in the Top Layer Service Delivery Budget implementation Plan include the following:

- a) Development of a Growth and Development Strategy to be submitted to Council by December 2020.
- b) Creation of job opportunities by 30 June 2021
 - 291 through the Expanded Public Works Programme (EPWP) for the organisation (GRDM)
 - 100 jobs through the construction and operation of the Regional Landfill facility by
 - 60 jobs through the Roads Services
- c) Financial viability measured In terms of the municipality's ability to meet its service debt obligations by 30 June 2021, calculated as (Overdraft+ Short Term Lease + Long Term Borrowing+ Long Term Lease) / (Total Operating Revenue - Operating Conditional Grant)

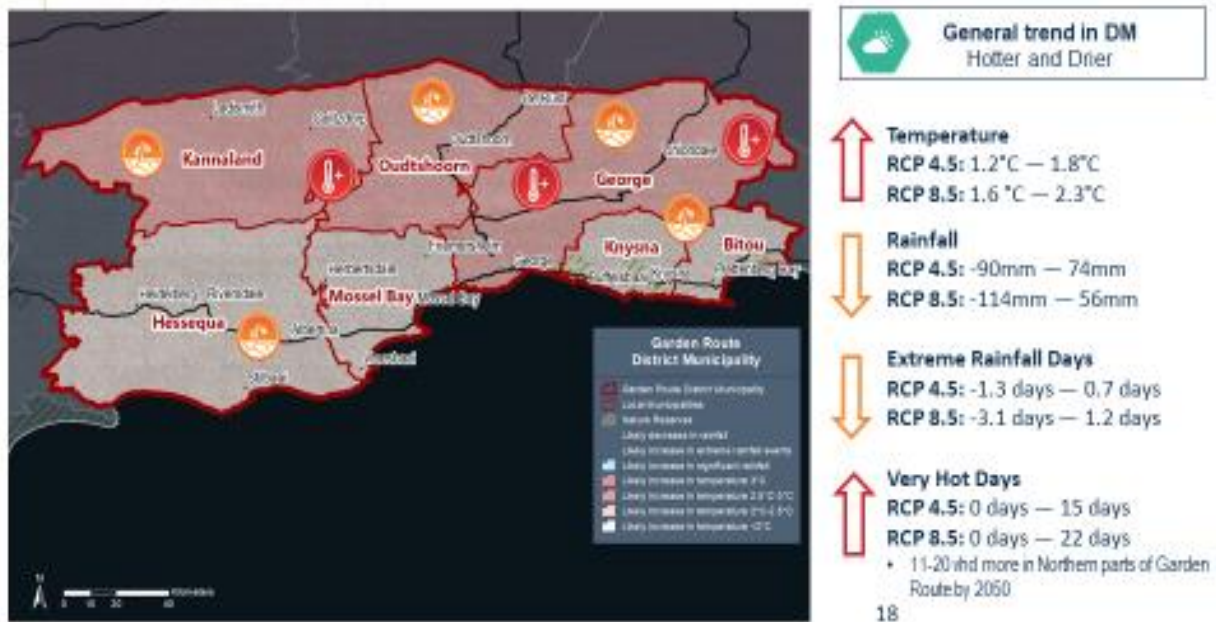
One other catalytic intervention that the GRDM Council identified to grow the economy and include emerging farmers in the agriculture space is the establishment of a Fresh Produce Market. The Agro industry is one of the prioritized sectors to contribute towards the realization of this mandate. This emanates from the fact that the region is well endowed with natural resources for agricultural development and industrialization through the sector. This is also coupled by the spatial reach of the sector into poorer areas of the region, thus providing opportunity for inclusive participation, its labour absorbing nature as well as the abundance of large domestic and international markets.

“GROW THE ECONOMY AND INCLUDE EMERGING FARMERS IN THE AGRICULTURE SPACE IS THE ESTABLISHMENT OF A FRESH PRODUCE MARKET.”

7.3 Environmental Forecast

Due to its physical location, topography and the climatic conditions of the district the GRDM is particularly vulnerable to the impact of climate change. Climate change is already harming food production and these impacts are projected to increase over time, with potentially devastating effects.

2050 Climate Change (Overview)



The most frequent disasters in the Garden Route District between are drought, flooding, fires (Veldt), fires (Informal settlements), animal diseases and environmental degradation.

The Garden Route District coastline is at medium to high risk of erosion, inundation, groundwater contamination (increased salinity) and extreme events. As global warming / climate change continues to increase so will the prevalence of natural disasters such as flooding, droughts and wildfires. It will be the poor living in under-served areas that will be the most affected. Greater consideration will need to be given to disaster management in the District. Alignment of disaster risk management areas in Garden Route District with the Western Cape Government's coast management lines must be encouraged through the SDF proposals. The Garden Route District Municipality has a high level of compliance to legislation and has a well-functioning Disaster Management Centre.

8. Key Recommendations

8.1 Integrated Development Plan

It must be noted that there is a need to reprioritize projects due to the impact of Covid-19.

Prioritise the implementation of the key projects identified in the 2020/21 IDP.

GRD Table 1 Total Departmental MTEF Infrastructure Budget and Number of Projects

Department	No. of Projects	2019/20 MTEF (R'000)	2020/21 MTEF (R'000)	2021/22 MTEF (R'000)	MTEF Total (R'000)
Education	11	52 500	122 000	111 000	285 500
Health	31	16 440	28 776	39 291	84 507
Human Settlements	45	367 281	404 250	386 790	1 158 321
Social Development	2	335	-	-	335
Transport and Public Works	39	663 918	736 794	561 650	1 962 362
Total	128	1 100 474	1 291 820	1 098 731	3 491 025

Local governments are at the centre of successful adaptation and risk reduction planning. Much of climate adaptation depends on local government integrating it into local policies, plans and processes such as their disaster risk reduction plans, spatial development frameworks, IDPs, environmental plans, and other budgeting and planning instruments. These should become an integral part of the “One Plan” of the District Municipality.

The conservation of biodiversity, and specifically water resources, is becoming more important in the context of climate change. Invest in integrated programmes and strategies to protect ecosystems through good land use planning, considering disaster risk reduction and climate change adaptation plans. (supply of bulk water storage and improved water management; preserve wetlands, etc).

Define Garden Route DM's role and function within the Green Energy sector and promote Green Energy initiatives and projects in the Garden Route District (as identified in the IDP)

Implementation of Alternative Waste Management Technologies at the Regional Landfill facility.

Assist Local Municipalities to complete waste characterisation studies.

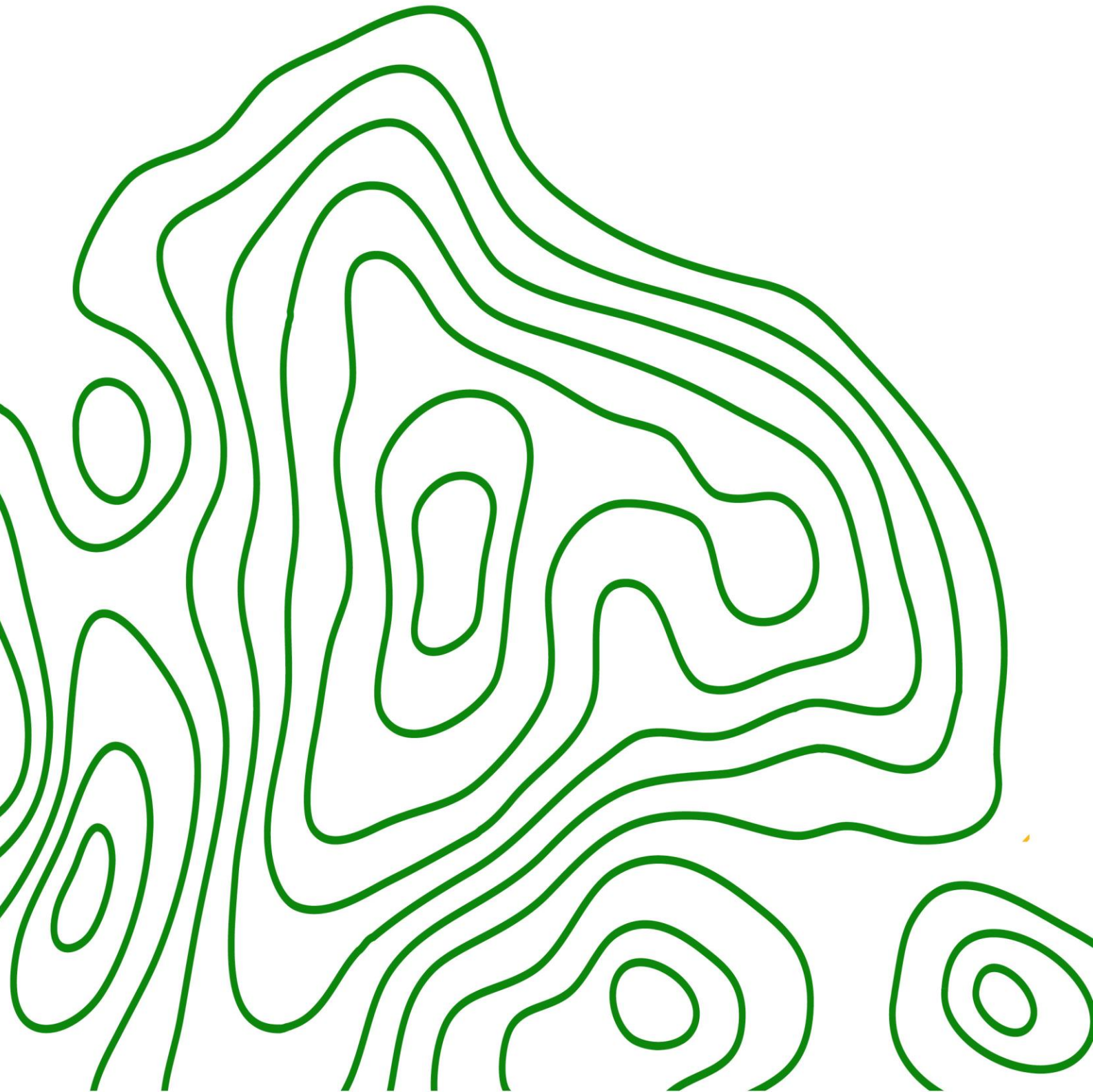
**“THE CONSERVATION OF BIODIVERSITY,
AND SPECIFICALLY WATER RESOURCES,
IS BECOMING MORE IMPORTANT IN THE CONTEXT
OF CLIMATE CHANGE.”**

8.2 Investor and Sponsorship Opportunities

Support the unlocking of the top 10 provincial infrastructure projects

GRD Table 2 Top 10 Infrastructure Projects in Garden Route District - MTEF Total

Department	Project/Programme Name	Infrastructure Type	Nature of Investment	MTEF Total (R'000)
Transport and Public Works	Maintenance ED DM	Routine Maintenance	Maintenance and repair	287 005
Human Settlements	George: Rosedale: Syferfontein - 3800 Services IRDP	Municipal project: Planning	Infrastructure transfers - Capital	259 670
Transport and Public Works	Maintenance Eden	Blacktop/Tarred Roads	Maintenance and repair	221 834
Transport and Public Works	C918 PRMG Oudtshoorn-De Rust	Blacktop/Tarred Roads	Refurbishment and rehabilitation	143 000
Human Settlements	Mossel Bay: Kwanongqaba: Louis Fourie Corridor: 1312 Sites - IRDP	Municipal project: Planning	Infrastructure transfers - Capital	126 110
Transport and Public Works	C1100 PRMG Reseal Holgaten	Resealing	Refurbishment and rehabilitation	111 000
Transport and Public Works	C964.2 Mossel Bay-Hartenbos phase 2	Blacktop/Tarred Roads	Upgrades and additions	105 000
Transport and Public Works	C1124 PRMG Reseal Herbertsdale Albertinia Gouritzmond	Resealing	Refurbishment and rehabilitation	103 000
Transport and Public Works	C822 PRMG Hartenbos-Groot Brak River	Blacktop/Tarred Roads	Refurbishment and rehabilitation	100 000
Transport and Public Works	C1008.1 Calitzdorp-Oudtshoorn rehabilitation (Spa Road)	Blacktop/Tarred Roads	Refurbishment and rehabilitation	77 000



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