



CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD



State of Cape Town Report 2016

Overview with infographics

Making progress possible. Together.



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Design and layout:

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Production:

Publication Unit, Integrated Strategic Communications, Branding and Marketing

Published by:

Integrated Strategic Communications, Branding and Marketing Department

This document should be referenced as: State of Cape Town Report 2016 – Overview with infographics. The full version State of Cape Town Report can be found at www.capetown.gov.za/publications.

Any feedback, comments or suggestions on the report or overview are welcomed and can be e-mailed to devinfo@capetown.gov.za.

Introduction

The State of Cape Town Report is a biennial publication produced by the Development Information and GIS Department of the City of Cape Town. The 2016 edition is the sixth, following on similar reports produced in 2006, 2008, 2010, 2012 and 2014. The report is designed to provide an overview of the city's development status at a particular point in time by giving an updated snapshot of the most pertinent issues influencing the state of Cape Town. The report highlights opportunities and challenges that the City of Cape Town administration (hereinafter the City) faces, contextualised within a broader context, and gives a real and current sense of the city and its inhabitants.

The production of the report was informed by two key contextual factors important to urban development in 2016:

- This is the first year in which the United Nations (UN) Sustainable Development Goals (SDGs) will be officially implemented. The SDGs follow on the Millennium Development Goals (MDGs), which lapsed in 2015. The SDGs comprise 17 goals with a total of 169 targets to be achieved by countries all over the world in the next 15 years. Importantly for cities, an urban sustainable development goal has been developed and introduced as Goal 11,

'Make cities inclusive, safe, resilient and sustainable' (or 'the urban goal'). This is highly significant, as it highlights and embeds the importance of cities and urban areas in the flagship UN sustainable development and international agenda, and is the first time that subnational units feature in this way.

- The New Urban Agenda – the outcome document of the UN Habitat III conference on housing and sustainable urban development in Quito, Ecuador – was officially launched in October 2016. It will guide a wide range of organisations and stakeholders' efforts around urbanisation over the next 20 years and will also serve as the foundation for policies and approaches that will affect urban areas and those active in them far into the future.

This overview presents key pieces of information and analyses on Cape Town's developmental context across five themes, namely social, economic, natural wealth, urban growth and form, and urban governance.

For more comprehensive information and analyses across the five themes, the full report should be referred to. View it online at www.capetown.gov.za/publications.

The following **five core themes** are covered:



Social



Economy



Natural wealth



Urban growth and form



Urban governance



Acknowledgements

This State of Cape Town Report 2016 and overview were compiled by the Development Information and Geographic Information Systems (DI&GIS) Department of the City of Cape Town with contributions from CCT departments.

Carol Wright, Natasha Primo and Ameen Benjamin reviewed and provided editorial input to earlier drafts of the chapters, case studies and overview. Ameen Benjamin was also responsible for overall project management of the report and overview.



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Information is presented at the time of writing (May 2016), with the latest updates where possible.

The 'City' refers to the City of Cape Town administration, including elected councillors, responsible for the development and local administration of the city.

The 'city' refers to the geographical area that is administered by the City of Cape Town, its physical elements, as well as all the people living in and active within the area.

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Contents

Introduction	3
1. Social	6
Demographics	7
Health	7
Education	8
Income poverty	8
Crime	8
2. Economy	9
Cape Town's economic growth performance	10
Sectoral drivers of Cape Town's economy	10
Cape Town's labour market	11
Informal sector in Cape Town	11
Cape Town's ports	12
3. Natural wealth	13
Air quality	14
Energy	15
Biodiversity	15
Water	16
Solid waste management	16
4. Urban growth and form	17
Access to basic services	18
Access to telecommunications	18
Access to public housing and the challenge of informality	19
Urban mobility - transport in Cape Town	20
Modes of transport in Cape Town	20
Travel time to work in Cape Town	21
5. Urban governance	22
Staff and budget	23
Structures and systems	23
Tools for improving the City's effectiveness and responsiveness	24
Conclusion	26



1. Social

Cities cannot succeed without the energy and investment of their citizens. The success of cities stems from their unique capacity to bring together a critical mass of social and cultural diversity.

Demographics

There is a trend towards smaller household units across all population groups. While the trend may be viewed as positive, there are associated challenges in the Cape Town context. These include:

- 1 The increased demand for housing with the consequent increase in housing prices.
- 2 The increased competition for scarce urban land for new housing development.
- 3 The breakdown of the extended family often considered as a powerful social support network.

POPULATION SIZE

(number of people)



CAPE TOWN HOUSEHOLDS

(number of households)



HOUSEHOLD SIZE

(average number of members)

3,50
2011

3,17
2016

SMALLER HOUSEHOLD SIZE

Source: CCT, 2016. DI & GIS Department using Stats SA data.

Health

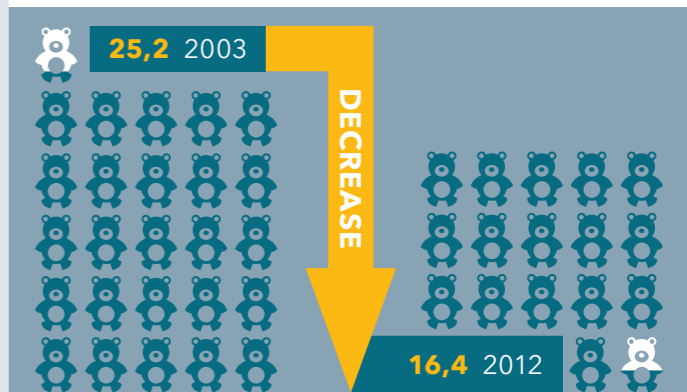
The infant mortality rate (IMR) is a key indicator of health and development in a society.

The significant reduction of IMR is attributed to the improvements in basic service delivery to low-income areas in Cape Town.

Source: Medical Research Council, 2013.

INFANT MORTALITY RATE (IMR)

(deaths per 1 000 live births of children under 5 years old)



Education

The percentage of the adult population in Cape Town (above 20 years of age) who had completed schooling only increased slightly between 2011 and 2014. This is a concern given the importance of education for reducing inequality.

Source: City of Cape Town, 2015. DI & GIS Department using Stats SA data.

ADULT POPULATION THAT COMPLETED SCHOOLING

(Grade 12)

30,07% 2011 | 30,38% 2014



Income poverty

The *Gini coefficient* measures inequality in levels of income. The higher the value between 0 to 1, the greater the level of income inequality. The *Gini coefficient* for Cape Town has improved over a ten year period, though inequality is still high, i.e. above 0,5.

Source: CCT, 2016. DI & GIS Department using Stats SA data.

GINI COEFFICIENT

(measure of income differences between people)

0,60 2001 | 0,59 2007 | 0,57 2010

Crime

Compared to other metros in South Africa, Cape Town had the highest overall crime rate in 2014/15. Cape Town continues to experience the highest murder, attempted murder, sexual crime and common assault crime, and robbery with aggravated circumstances, and drug-related crime.

Cape Town showed an increase in overall reported crime rates between 2005/6 and 2014/15.

5,5% INCREASE

OVERALL CRIME RATE

(per 100 000 population)



Source: SAPS, 2015; DI & GIS Department, based on Stats SA mid-year estimates 2015.

2. Economy

The economy is the point of departure for assessing the state of development in a city.

Cape Town's economic growth performance

Cape Town is the second highest contributor to the national gross domestic product (GDP) after the City of Johannesburg.

Cape Town's positive growth in real GDP per capita suggests that economic growth from 2004 to 2014 was an outcome of population growth, as well as increased productivity as a result of scale and specialisation.

Real GDP is an inflation-adjusted measure that reflects the value of all goods and services produced by an economy in a given year, expressed in base-year prices, and is often referred to as 'constant price'.

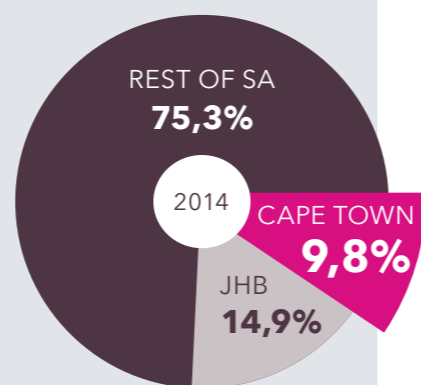
Source: CCT, 2016. Trade & Investment Department calculations based on Global Insight Rex Regional Data, 2016.

CAPE TOWN'S CONTRIBUTION TO NATIONAL GDP

9,4% 2004 | 9,8% 2014

REAL GDP PER CAPITA

R67 010 2004
R76 420 2014



Sectoral drivers of Cape Town's economy

Cape Town is a primarily service driven economy, with tertiary (e.g. finance) sector industries contributing almost 80% to the city's total gross value added (GVA). Like most cities, the primary (e.g. agriculture) sector in Cape Town is very small, contributing less than 1% to the city's economic output.

Cape Town received R59 billion worth of foreign direct investment (FDI) between 2003 and 2014, with the largest recipients of FDI being information and communications technology (ICT), real estate, tourism, transport and business services. ICT, the largest FDI-receiving sector, attracted R16 billion worth of FDI over the period.

Source: CCT, 2016. Trade & Investment Department calculations based on Global Insight Rex Regional Data, 2016.

FINANCE AND INSURANCE SECTOR GROWTH

30% 2005 to 2014

FOREIGN DIRECT INVESTMENT (FDI)

R59 billion

2003 to 2014

Cape Town's labour market

Of all the metros, Cape Town had the second-lowest *strict unemployment rate* following eThekweni (15,91%), and the lowest expanded (broad) unemployment rate for the fourth quarter of 2015. As a percentage of the total broadly unemployed, Cape Town has the second-lowest proportion of discouraged work seekers (2,23%) of all the metros. In contrast, 33% of broadly unemployed people in eThekweni are classified as discouraged work seekers.

Of all the South African metros, Cape Town has the lowest *broad unemployment rate* for its population between the ages of 15 and 24, but at 47%, it is still exceptionally high. The youth Not in Employment, Education and Training (NEET) rate is much lower than the broad youth unemployment rate (26,48% compared to 46,93%). The implication is that almost half of Cape Town's young unemployed population is engaged in education or training. The 26,48% of individuals who are not contributing to either the current or future output of the economy (by either working or acquiring skills to work) require a two-pronged intervention that addresses both access to quality education, together with training and skills development, as well as job availability.

Source: CCT, 2016. Trade & Investment Department, based on Stats SA Quarterly Labour Force Survey, 2016.



UNEMPLOYMENT IN CAPE TOWN

15- to 64-year-olds, 2015: Q4

CAPE TOWN

20,52%
Strict unemployment

21,81%
Broad unemployment

2,23%
Discouraged workers as a proportion of broad unemployment

ETHEKWINI

15,91%
Strict unemployment

24,34%
Broad unemployment

33%
Discouraged workers as a proportion of broad unemployment

YOUTH UNEMPLOYMENT IN CAPE TOWN

15- to 24-year-olds, 2015: Q4



Informal sector in Cape Town

The informal economy is vital to efforts to reduce unemployment in the city. Many South Africans use informal work as an alternative to unemployment.

Without informal sector income the poverty rate (the proportion of individuals earning less than R682 per person per month) in the city would be 25,1%; with informal sector income factored in, the poverty rate is reduced to 20,6%. This 4.5 percentage point reduction in Cape Town's poverty rate is equivalent to lifting 186 000 people out of poverty.

Source: CCT, 2016. EPIC, Quarter 4.

PERCENTAGE TOTAL EMPLOYMENT IN THE INFORMAL SECTOR

9,44% 2011 | 11,3% 2015

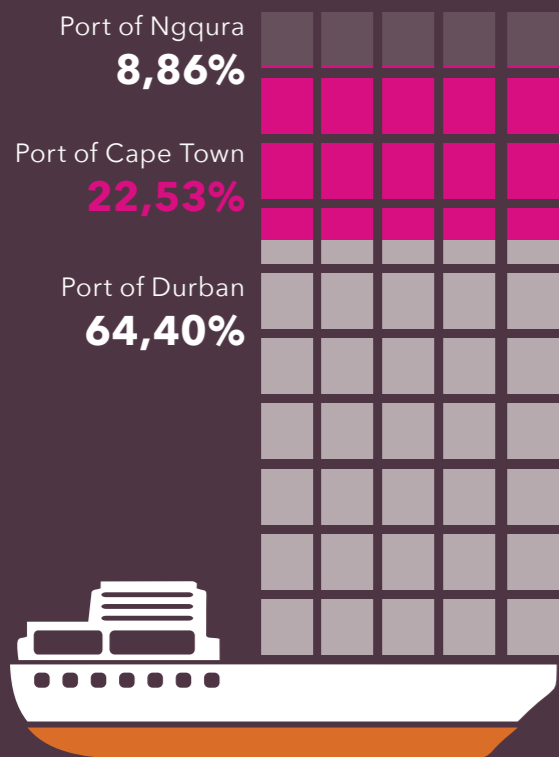
EQUIVALENT TO

186 000
PEOPLE OUT OF POVERTY
DUE TO INFORMAL SECTOR INCOME



Cape Town's ports

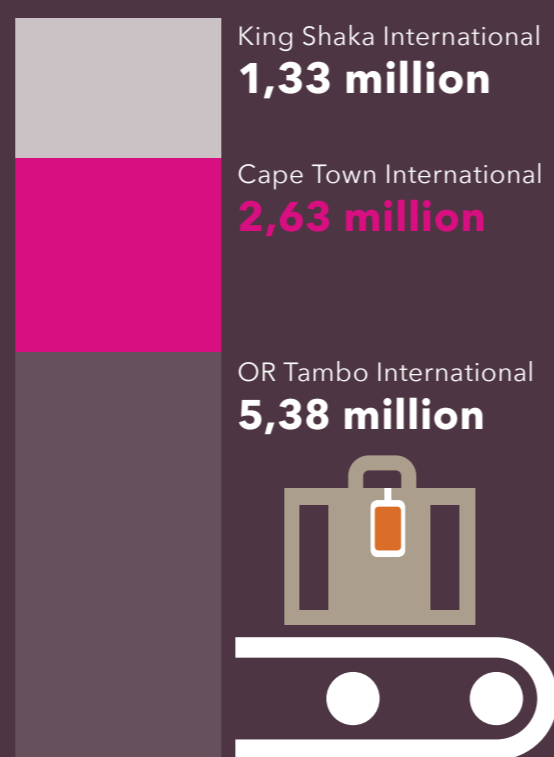
TOTAL CONTAINER HANDLING IN SOUTH AFRICAN PORTS FOR 2015



The Port of Cape Town is South Africa's second-busiest container-handling sea port.

Source: CCT, 2015. EPIC, Quarter 4.

TOTAL PASSENGER MOVEMENTS IN 2015



Cape Town International Airport, voted the best airport in Africa in 2015, is South Africa's second-busiest airport.

Source: Airports Company South Africa (ACSA) passenger movement statistics, 2016.

3. Natural wealth



Climate change effects pose challenges through the risk of rising sea levels and associated impacts on the low-lying urban and coastal environments. It further contributes to changing rainfall patterns and temperature extremes, negatively affecting water resources and biodiversity, as well as food security.

Air quality

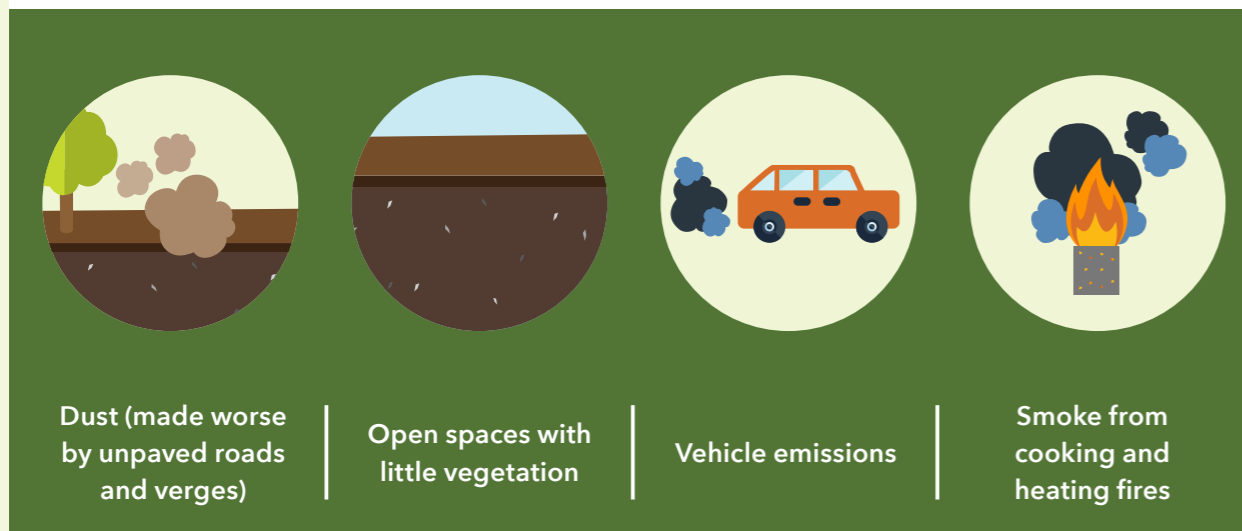
MOST COMMON SOURCES OF PARTICULATE MATTER (PM₁₀) POLLUTION IN CAPE TOWN:



Since 2009, only Khayelitsha - with nine exceedances - and Wallacedene - with 29 exceedances - have failed to comply with the limit of four exceedances of the South African

120 µg/m³ daily standard. There has been a steady reduction in PM₁₀ level exceedances in Khayelitsha since 2012.

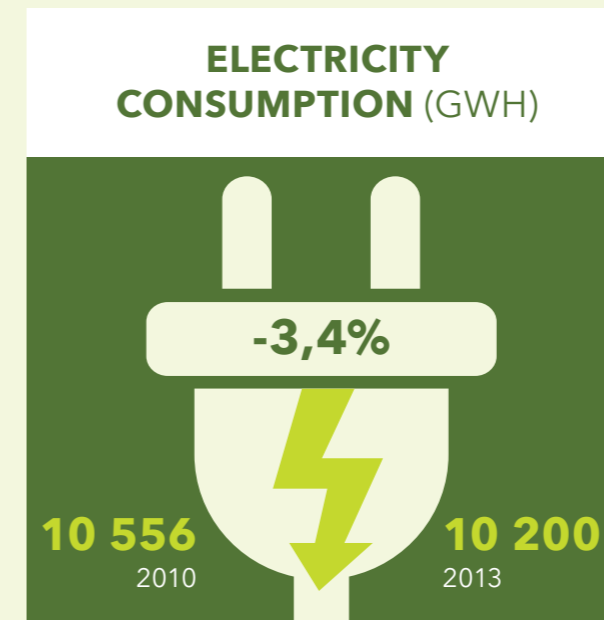
MOST COMMON SOURCES OF PARTICULATE MATTER (PM₁₀) POLLUTION IN KHAYELITSHA:



Source: State of Cape Town Report 2014. DI & GIS Department.

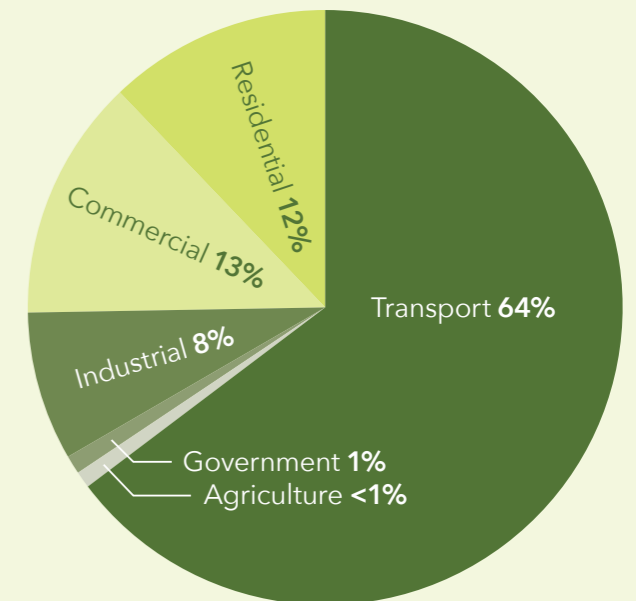
Energy

Cape Town experienced a decline in electricity consumption in the period 2010 to 2013. Over the period April 2013 to April 2014, consumption was consistently 20% (2 446 GWh) below the business-as-usual baseline (projected at a 3,3% annual increase on the 2006/7 baseline) and is now even below 2006/7 consumption levels.



Although the transport sector consumed the largest share of energy (64%), it is only responsible for 35% of CO₂ emissions, while the residential and commercial sectors produce comparatively higher CO₂ emissions. This is due to the carbon intensity of coal-based electricity generation.

ENERGY USE BY SECTOR, 2012



Source: CCT, State of Energy Report 2015.

Biodiversity

Cape Town has six endemic vegetation types, which means that they can only be conserved within the boundaries of Cape Town.

Although the total area of biodiversity lost has increased, the total area under formal protection has expanded over the past century, with significant increases since the mid-1990s.

By December 2014, altogether 60,81% of the BioNet had been placed under conservation. The achievement is remarkable and indicates a commitment to long-term biodiversity conservation in the city.

Source: CCT, State of Environment Report 2015.

21 CRITICALLY ENDANGERED VEGETATION TYPES IN SOUTH AFRICA



THREATENED SPECIES IN SOUTH AFRICA



Cape Town has a high incidence of threatened species, despite it comprising only 0,1% of the country's surface area.

Successful cities provide stimulating environments for their inhabitants without imposing unsustainable demands on natural resources and ecosystems.



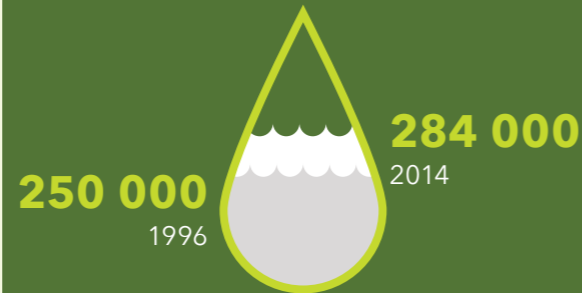
Water

DAILY WATER USE PER CAPITA (ℓ)



These achievements are in line with the City's Environmental Agenda 2009-2014 target to reduce overall water use to **290 000 mℓ** per year, and use per capita to **180 ℓ** per day.

OVERALL ANNUAL WATER USAGE (Mℓ)



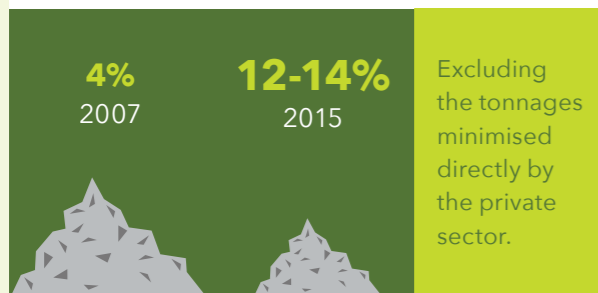
With highs of around **305 000 mℓ** in 1999 and 2009.

In 2015, just under 19 500 Mℓ of water (about 6%) was reused.

Source: CCT Water and Sanitation Department 2016.

Solid waste management

LANDFILL WASTE MINIMISED (diverted from landfill)



Excluding the tonnages minimised directly by the private sector.

SOLID WASTE DISPOSED (tonnes)



Waste materials are increasingly being regarded as potentially valuable resources.

About 18% of total waste is diverted annually through private sector waste minimisation programmes.

Source: CCT Solid Waste Department 2016.

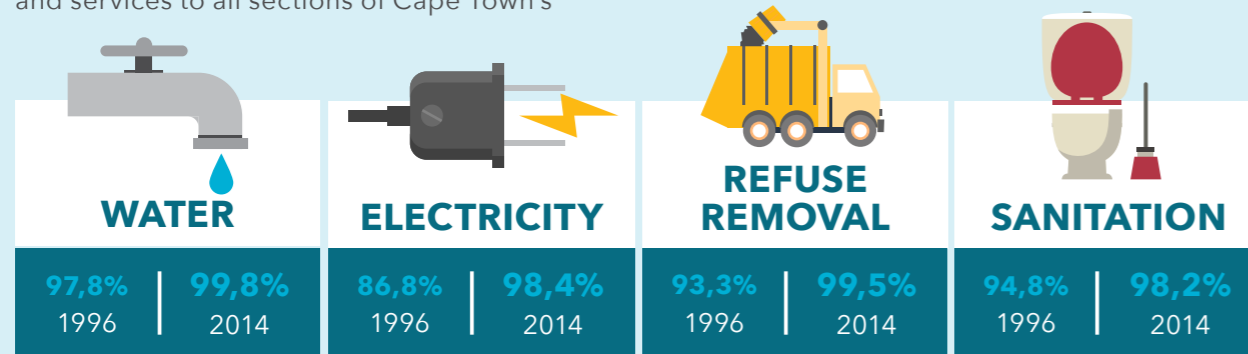
4. Urban growth and form

Urban population growth has implications for the City's capacity to provide new infrastructure and services, including the maintenance of existing stock, such as roads, water and wastewater facilities, as well as other public infrastructure, facilities and services.

Access to basic services

The City continues to increase access to basic services, however challenges remain in relation to the provision of basic infrastructure and services to all sections of Cape Town's

population. Although households in informal settlements may have access to basic services, these may be shared with other households.



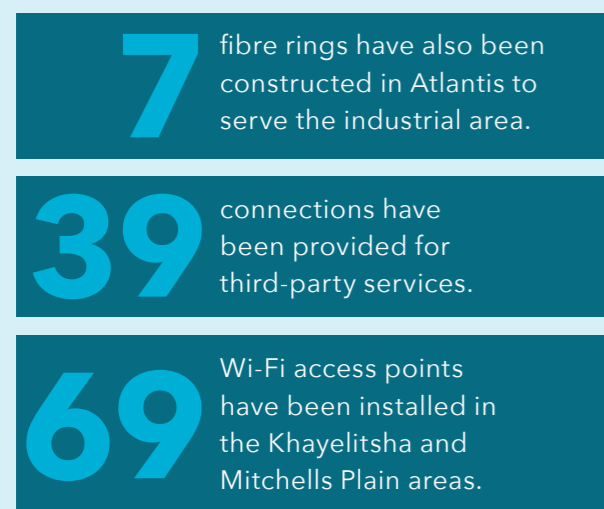
Source: StatsSA Census 1996, GHS 2014.

Household access of above 98,2% across all basic services in 2014.

Access to telecommunications

At an estimated cost of R100 million, the City approved the construction of a wireless telecommunications network in the metro south-east to leverage the City's optic-fibre network so as to enable Khayelitsha and Mitchells Plain households and businesses to access wireless internet at reduced prices for implementation starting in 2014/15.

Installed to date:



Source: CCT 2015.



ACCESS TO TELEPHONY

(landlines or mobile)



Access to and the use of landline telephones are dropping. 90,5% of black African households used cellphones as their sole means of communication in 2014.

Source: StatsSA Census 1996, GHS 2014.



HOUSEHOLDS WITH NO INTERNET ACCESS



Black African households with no internet access is estimated at 37,6%.

Source: StatsSA Census 1996, GHS 2015.



Access to public housing and the challenge of informality

One of Cape Town's biggest growth challenges is managing informal settlements and the escalating number of households living in backyard structures.

Growth in informal dwellings has largely occurred in the metro south-east, and the establishment of backyard dwellings is mainly prevalent in areas where subsidised housing has been delivered.

To respond to this challenge, the City's five-year Integrated Human Settlements Plan 2012-2017 sets out a range of strategies for providing incremental housing, and regularising and upgrading informal settlements.

The City spent 90% of its Urban Settlements Development Grant (across all directorates) during 2014/15 and delivered a total of 3 822 sites, 3 372 top structures, and 1 525 other housing opportunities.

Source: City of Cape Town, 2015.

The continued existence of informal settlements and the growth in informal structures in the backyards of formal township houses suggest an unabated demand for low-cost housing.

HOUSEHOLD HOUSING TYPES 2014



Informal housing
16,5%



Formal housing
80,4%



No housing
3,1%

Source: StatsSA GHS 2014.

Urban mobility - transport in Cape Town

Sustainable cities make greater provision for public and non-motorised transport infrastructure, both demanding and yielding a more compact city form. Both of these elements form a core component of the City's Integrated Transport Plan (ITP) 2012-2017. The City's Integrated Public Transport Network (IPTN) Plan 2013-2018 includes provision for

rail, bus rapid transit (BRT) services, non-motorised transport (NMT), as well as road-based public transport improvements.

Cape Town has established Transport for Cape Town (TCT) that is tasked with delivering integrated transport to address mobility challenges in Cape Town, for the benefit of all residents.



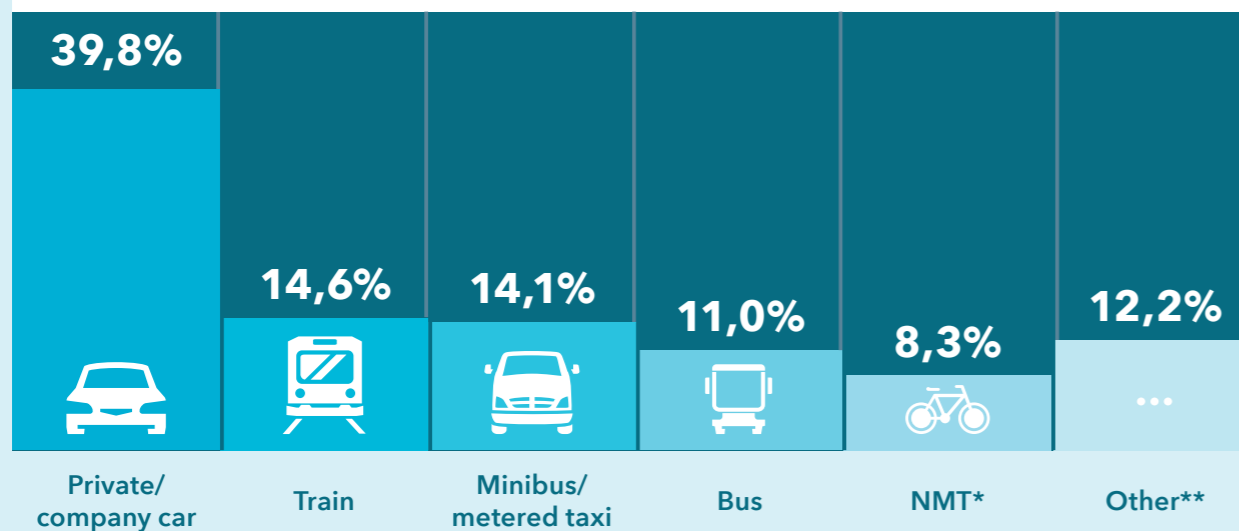
Modes of transport in Cape Town

Private/company-car use in Cape Town increased steadily from 2009 to 2012 (to a high of 42%), and then declined again to 39,8% in 2014. Over the same period, minibus/sedan taxis were the second-most-used mode of public transport, followed by buses. However, train use shows a decline from 16,3% in 2013 to 14,6% in 2014. The use of minibus/sedan taxis declined slightly in the corresponding period, while buses remained steady around the 10% mark. In terms of the daily modal

split for passenger trips entering the Cape Town CBD between 2001 and 2011, about 60% of passenger trips were by means of public transport and non-motorised modes, compared to approximately 40% of trips undertaken in private cars.

One of the City's major challenges is the predominant use of private cars as the preferred mode of transport. As more cars come onto the existing road network, commuters are likely to face more traffic congestion.

TRANSPORT MODES TO AND FROM WORK IN CAPE TOWN, 2014



*Non-motorised transport (NMT): Walking 7,2%, Motorcycle/bicycle 1,1%.

**Other: Office is at home: 8,4%; Lift club: 2,9%; Other: 0,9%.

Source: StatsSA GHS 2014.

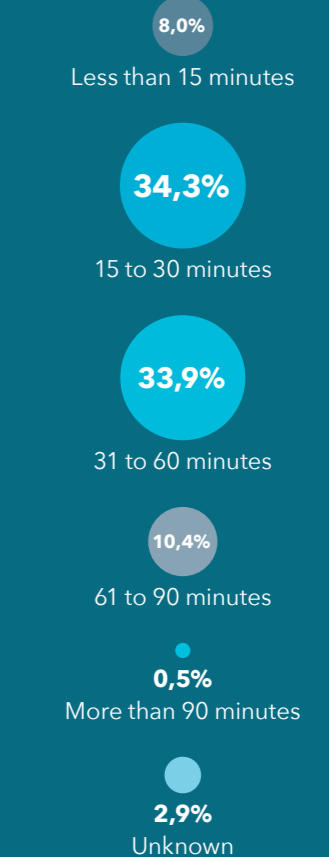
Travel time to work in Cape Town

The majority of low-income black African and coloured households live further away from the city centre and other major economic nodes around the city, and therefore have to commute longer distances and times by means of public transport modes.

Public transport has a role to play in creating an enabling environment that is accessible to all. TCT aims to provide safer and higher-quality public transport services across all modes - road, rail, walking and cycling - at a greater quantity. The City is implementing the Cape Town Integrated Rapid Transit (IRT) system to transform the public transport sector. As part of the IRT initiative, the MyCiTi bus service was launched in the 2010/11 financial year, prioritising inner-city routes where there is high passenger demand yet no rail service. In the 2013/14 financial year, MyCiTi extended to other areas, including an express service between Khayelitsha, Mitchells Plain, central Cape Town and Atlantis.

In 2014, more than two-thirds of commuters travelled either 15 to 30 minutes or 30 minutes to an hour between home and their place of work.

TRAVEL TIME TO WORK IN CAPE TOWN, 2014*



* Excluding those who work from home.

Source: StatsSA GHS 2014.



5. Urban governance

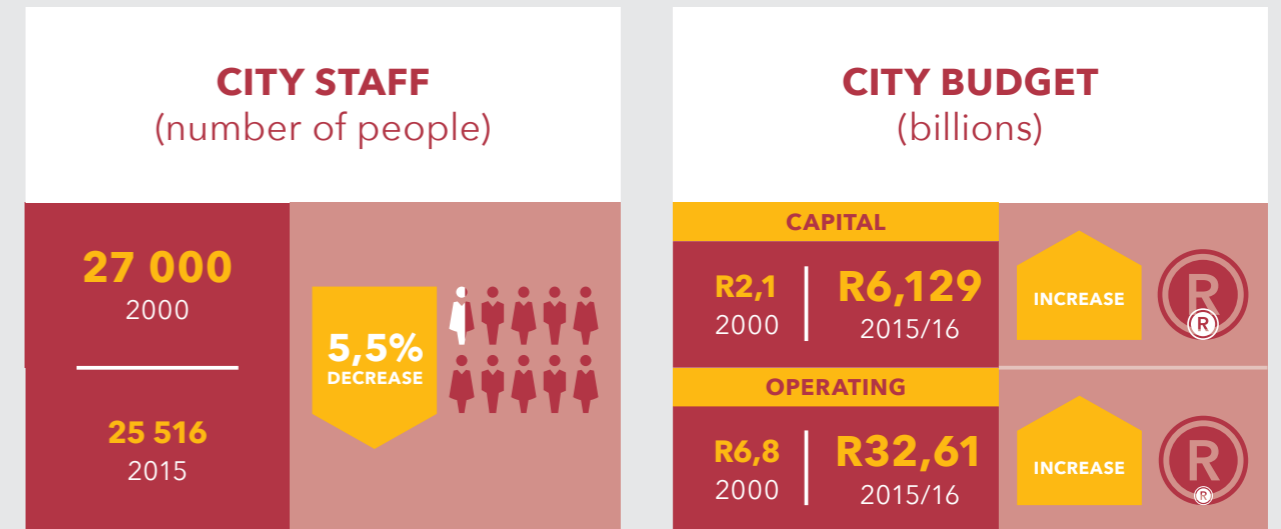
Urban governance is premised on partnerships between stakeholders:

“It refers to the processes by which local urban governments in partnership with other public agencies and different segments of civil society respond effectively to local needs in a participatory, transparent and accountable manner.”

Source: UNFPA; 2007 pg 69.

Staff and budget

For 2015/16, the City managed to spend 89,6% of its total capital budget of R6,129 billion. The City of Cape Town also received an unqualified audit opinion, as well as a clean audit status from the Auditor-General of South Africa for the 12th and third consecutive years respectively.



12 consecutive unqualified audits

Source: CCT Annual Report 2014/15.

Structures and systems

Council is the legislative and executive body responsible for governing Cape Town and is comprised of both ward councillors and proportional representation (PR, or 'party list') councillors, in roughly equal proportions.

Ward committees are coordinated by subcouncils, which serve as an administrative link and support to the structures of Council. Subcouncils are established to assist the municipality in the performance of its duties and the exercise of its powers on a decentralised basis.

In 2014/15, the Strategic Policy Unit in the Office of the Executive Mayor proposed new ways of working within the City and developed a Transversal Management System (TMS) and guideline. The primary purpose of the TMS



NUMBER OF COUNCILLORS



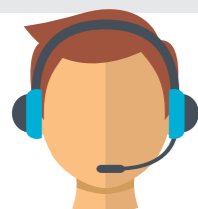
Source: CCT Internal Resources 2016.

is to complement the existing structure with additional platforms for cross-directorate communication and decision making, thereby changing the organisational culture from hierarchical and 'silo-oriented' to an integrated and coordinated system.

Tools for improving the City's effectiveness and responsiveness

The City is continually seeking to improve its effectiveness and efficiency as an organisation, the systems and processes it uses for service

planning, reporting and service delivery, as well as the mechanisms available to residents to provide input to the City on service delivery concerns. For this reason, the administration has a number of platforms to deepen its capacity and facilitate engagement with City stakeholders, including specific measures targeted at poorer residents in Cape Town.



CALL CENTRES

The City operates dedicated Technical Operations Centres (TOCs), for emergency- (107), electricity-, and water-related queries, Transport (TCT) and Corporate.

CALLS RECEIVED

3 072 930
2014/15

RESPONSE TIME FOR TCT AND EMERGENCY CALLS

10 seconds

FIRST-TIME CALL RESOLUTION

80% target
Consistently exceeded.

The City also has a dedicated toll-free hotline for the Copperheads, the City's task team dealing with metal theft.



FREECALL LINES

142
total number of FreeCall lines installed since 2009

32

installed between January and December 2015

22,5%
2015

77,5%
2009 - 2014

Located in municipal buildings, housing offices, cash offices, libraries, clinics and in community facilities throughout the city.



ENTERPRISE RESOURCE PLANNING (ERP)

The implementation of the City's SAP enterprise resource planning system is the largest in local government in the world and has been running for more than ten years. Development started in 2000, and the SAP system went live in 2003.

NUMBER OF SAP BUSINESS PROCESSES ENCAPSULATED

420
2013

CONSOLIDATED INVOICES

1,2 million
2013

Results from case study of the system's implementation.

The City continues to invest in SAP. In 2015/16 it added SAP Project Portfolio Management (PPM) to the City's SAP environment to provide project management intelligence on the 100 biggest capital projects under way.



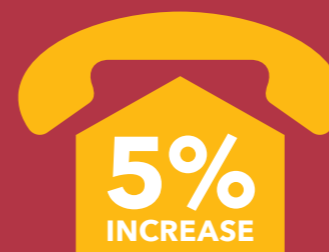
SERVICE NOTIFICATION CALLS RECEIVED

782 098
2013/14

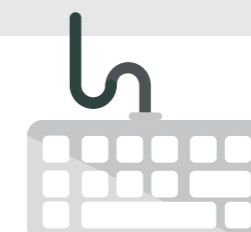
822 179
2014/15

The service notification system is part of a larger notification system operated by the City and was created to ensure the efficient receipt, tracking and resolution of citizens' complaints and requests by City departments.

Understanding the service delivery trends enables the City to plan more proactively and informs budget provision for areas of need.



5%
INCREASE



e-SERVICES

The City's Information Services and Technology Department started developing and testing the City's eServices platform in 2010, and the platform was **launched in 2012**.

The online platform allows residents and businesses to transact with the City from the comfort of their own homes or offices, **saving them time and money**.

The City's SmartCape initiative is available to residents at all 101 libraries across Cape Town.

Using a **single log-in**, residents and businesses can transact with the City around municipal accounts.



COMMUNITY SATISFACTION SURVEY

Since 2007/8, the City has undertaken an annual Community Satisfaction Survey to gather detailed feedback from Cape Town's residents and businesses regarding the services it renders.

BY RESIDENTS

The mean overall satisfaction rating of the City's services by residents was 2,8 (on a five-point rating scale) in 2014/15, which represented an improvement on the rating of 2,4 received in 2007/8.

2015/16 (2,8)
2007/8 (2,4)

BY BUSINESSES

Overall, the 2014/15 business perception survey results indicate that the businesses in Cape Town generally display a high level of satisfaction with the services provided to them by the City.

2015/16 (3,5)
2007/8 (2,9)

Sources: City of Cape Town 2016. 'City's services are a free call away' media release.

Sources: City of Cape Town 2016. 'City's services are a free call away' media release.



Conclusion

In a now predominantly urban world, the role of cities is increasingly acknowledged to be pivotal to national, regional and global social and economic development and growth in the 21st century.

However, in pursuing social and economic prosperity, cities also need to give equally careful consideration to their environmental footprint. The need for the social, economic and environmental spheres of a city to complement one another to achieve sustainable development now and into the future has gained significant international and local traction in the past two decades.

Across the social, economic, natural wealth, urban growth and form, and urban governance themes, it has been established that certain indicators reflect improvement; others point to neutrality (i.e. no further/significant improvement or deterioration), while a few reflect a deterioration.

Overall, however, reflections across the five themes of this report suggest that Cape Town is moving in the right direction.

The City's five strategic focus areas of turning Cape Town into an opportunity city, a safe city, a caring city, an inclusive city and a well-run city have had and continue to have a positive influence in keeping the administration on course, to continue to improve the quality of life of its residents and enabling businesses to thrive.

More remains to be done in order to ensure that the city continues on this urban growth path, which will gain further impetus by embracing the guiding principles of the New Urban Agenda and meeting the 2040 Sustainable Development Goal targets, especially as they relate to urbanisation and providing people access to opportunities and prosperity.



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