



Western Cape
Government

A central green shield-shaped logo with a white border. Inside the shield, the letters 'SEP' are written in large, bold, white capital letters. Below 'SEP', the words 'SOCIO-ECONOMIC PROFILE' are written in smaller, white, capital letters. Surrounding the central logo are several circular icons in a light grey color, each with a long shadow. The icons include: a building with a person, a Wi-Fi symbol, a person working with a shovel, a graduate in a cap and gown, a family of four, a stack of coins with an upward arrow, a pencil and ruler, and an ambulance.

SEP

SOCIO-ECONOMIC
PROFILE

Stellenbosch Municipality

2021



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STELLENBOSCH: AT A GLANCE

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Stellenbosch: At a Glance

Demographics

Population Estimates, 2021; Estimated households, 2020



Population

196 036



Households

50 328

Education

2020



| | |
|-----------------------|-------|
| Matric Pass Rate | 85.1% |
| Retention Rate | 73.1% |
| Learner-Teacher Ratio | 26.8 |

Poverty

2020



| | |
|-------------------------|------|
| Gini Coefficient | 0.61 |
| Human Development Index | 0.74 |

Health

2020/21



Primary Health Care Facilities

8

excl mobile/satellite

Immunisation Rate

52.7%

Maternal Mortality Ratio (per 100 000 live births)

57.3

Teenage Pregnancies - Delivery rate to women U/18

11.4%

Safety and Security

Actual number of reported cases in 2020/21



Residential Burglaries

904

DUI

164

Drug-related Crimes

1 252

Murder

70

Sexual Offences

194

Access to Basic Service Delivery

Percentage of households with access to basic services, 2020



Water

94.4%

Refuse Removal

86.7%



Electricity

92.2%



Sanitation

91.1%



Housing

72.7%



Road Safety

2020/21

Fatal Crashes 31

Road User Fatalities 39

Labour

2020

Unemployment Rate (narrow definition)

11.3%



Socio-economic Risks

- Risk 1 Unemployment levels
- Risk 2 Housing demand
- Risk 3 Skills development

Largest 3 Sectors

Contribution to GDP, 2019

Finance, insurance, real estate & business services

21.7%

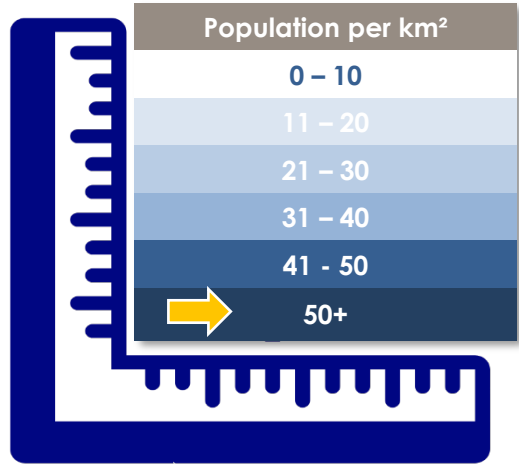
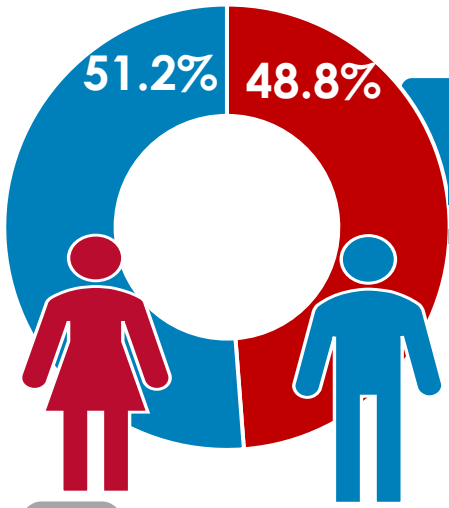
Wholesale and retail trade, catering and accommodation

21.1%

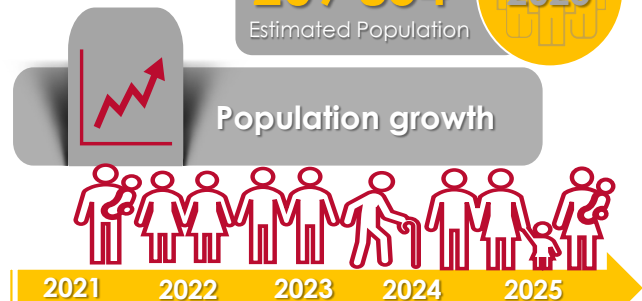
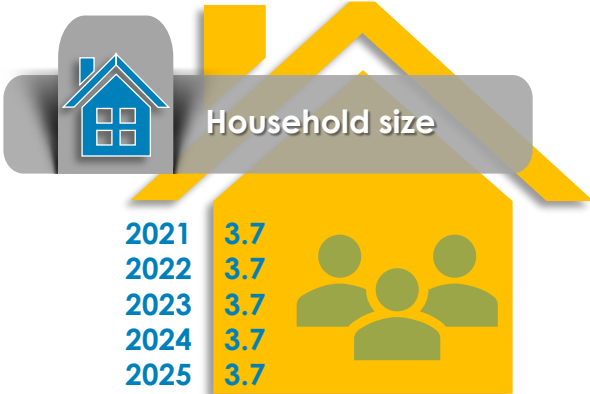
Manufacturing

16.6%

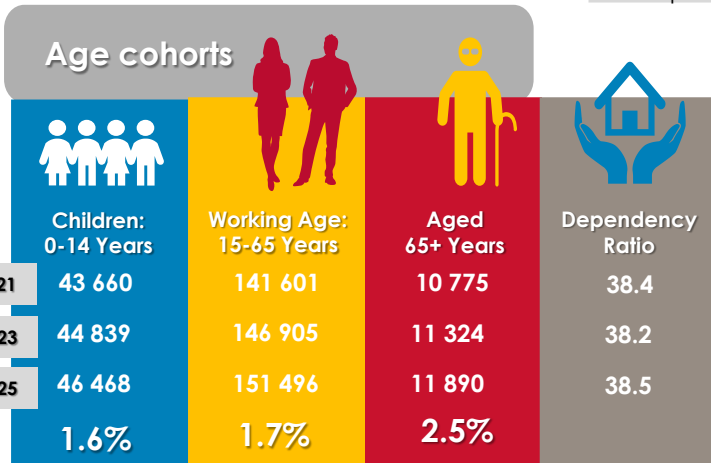
DEMOGRAPHICS



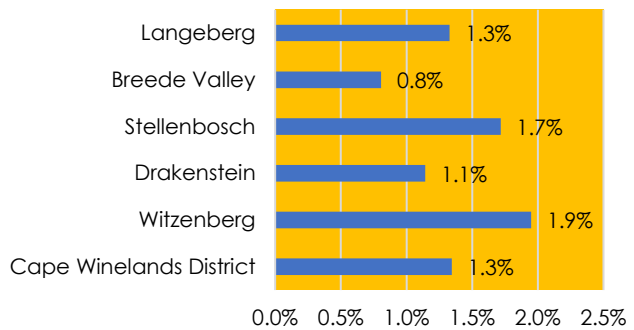
| | 2021 | 2022 | 2023 | 2024 | 2024 |
|-----------------------|-------------|-------------|-------------|-------------|-------------|
| Cape Winelands | 97.4 | 98.0 | 98.1 | 98.3 | 98.4 |
| Witzenberg | 108.2 | 109.1 | 109.5 | 109.8 | 110.2 |
| Drakenstein | 97.0 | 97.6 | 97.8 | 98.0 | 98.1 |
| Stellenbosch | 95.3 | 95.7 | 95.8 | 95.8 | 95.9 |
| Breede Valley | 93.5 | 93.9 | 93.9 | 93.9 | 93.8 |
| Langeberg | 95.6 | 96.1 | 96.3 | 96.4 | 96.6 |



| | | | | | |
|---------------------|------------|------------|------------|------------|------------|
| Stellenbosch | 1.7 | 1.9 | 1.7 | 1.7 | 1.7 |
| Cape Winelands | 1.4 | 1.4 | 1.4 | 1.3 | 1.3 |
| Western Cape | 1.4 | 1.4 | 1.4 | 1.4 | 1.4 |



Population growth 2021 - 2025



Demographics

Population

Stellenbosch's population totals 196 036 persons in 2021, the second most populated municipal area in the Cape Winelands District (CWD). This total is expected to grow to 209 854 by 2025, equating to an average annual growth rate of 1.7 per cent for the period.

Sex ratio

The overall sex ratio (SR) depicts the number of males per 100 females in the population. The data indicates that there are notably more females than males in the Stellenbosch municipal area with a ratio of 95.8 males per 100 females in 2021. The increasing SR for Stellenbosch could be attributed to a wide range of factors such as a decrease in female mortality rates as well as the potential inflow of working females to the municipal area.

Age cohorts

It is evident that Stellenbosch has an ageing population. Between 2021 and 2025, the highest population growth is estimated for the aged cohort, with expected growth for the period reaching an average annual rate of 3.6 per cent. This is more than double the growth in the working age cohort (1.6 per cent). The size of the aged cohort is however relatively small in comparison to the working age category. As such, the dependency ratio remains mostly unchanged between 2021 and 2025.

Household size

Household size refers to the number of people per household. The actual size of households in the municipal area is trending downwards between 2021 and 2025. Contributing factors to a stagnation in household size growth could include, but are not limited to, lower fertility rates, occurrences of divorces, ageing population etc.

Population density

Amidst rapid urbanisation across the Western Cape, population density figures will aid public sector decision makers to mitigate environmental, health and service delivery risks. In 2021, the population density of the Cape Winelands District was 44 persons per square kilometer. In order of highest to lowest, the various local municipal areas compare as follows:

- Witzenberg 14 people/km²
- Drakenstein 191 people/km²
- **Stellenbosch 236 people/km²**
- Breede Valley 51 people/km²
- Langeberg 27 people/km²

EDUCATION

Educational facilities

39

Number of schools

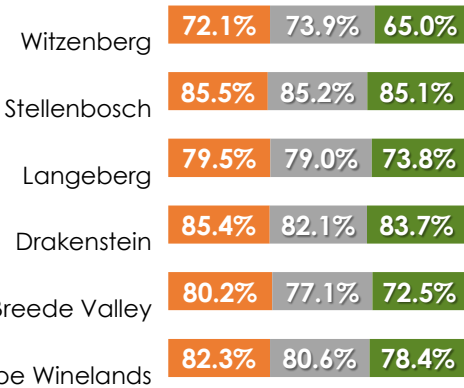
25

Number of no-fee schools

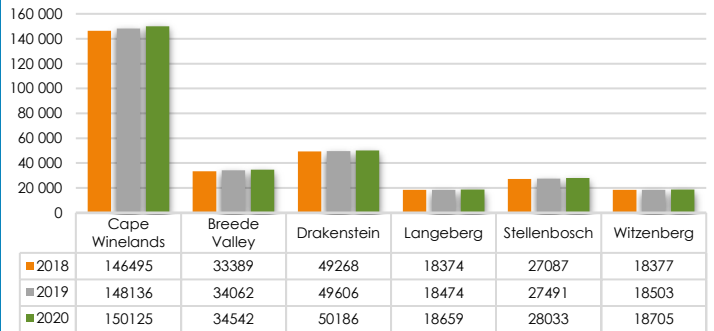
22

Number of schools with libraries

Education outcomes



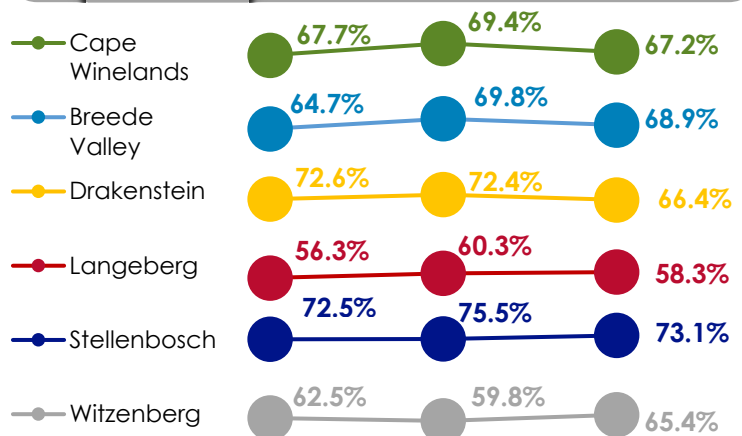
Learner enrolment



Learner-Teacher Ratio 2018-2020

| | | | |
|----------------|------|------|------|
| Cape Winelands | 27.9 | 28.7 | 27.7 |
| Breede Valley | 28.4 | 28.7 | 28.2 |
| Drakenstein | 28.3 | 28.2 | 27.7 |
| Langeberg | 28.5 | 28.9 | 28.4 |
| Stellenbosch | 26.0 | 26.6 | 26.8 |
| Witzenberg | 28.3 | 27.9 | 27.8 |

Learner retention



Education

Learner enrolment, the learner-teacher ratio and learner retention rate

Learner enrolment in the Stellenbosch municipal area increased by 1.7 per cent from 27 087 in 2018 to 28 033 in 2020. The growth rate in learners is slightly above the Western Cape average of 2.1 per cent across the same period.

The learner-teacher ratio in the Stellenbosch municipal area has gradually been on the rise from 26.0 in 2018 to 26.6 in 2019 and 26.8 in 2020. This is still below the Provincial average of 30.3. It is commonly assumed that children receive less personalised attention in larger class environments and that high learner-teacher ratios are detrimental to improved educational outcomes. Although the Stellenbosch municipal area has the highest learner retention rate (73.1 per cent) in the Cape Winelands District, school drop-outs remain a grave concern. The learner retention rate is influenced by a wide array of factors, including economic influences such as unemployment, poverty/ very low household income, as well as social concerns such as teenage pregnancies. Retention rates should be kept in mind when considering education outcomes/ results, as low retention rates are likely to skew outcomes, as drop-outs are automatically excluded from any outcomes/results. Being able to retain learners is essential for overall positive education outcomes.

Number of schools

In 2020, the Stellenbosch municipal area had a total of 39 public ordinary schools. The number of schools has remained constant since 2018.

Number of no-fee schools

The number of no-fee schools has also remained steady at 39 between 2018 and 2020. This translates into a total of 64.1 per cent of schools being registered with the Western Cape Department of Education as no-fee schools.

Schools with libraries/media centres

The number of schools with libraries/media centres decreased from 29 in 2018 and 2019 to 22 in 2020. The availability of library facilities within schools contribute towards narrowing the academic attainment gap by allowing students access to information which is in turn directly linked to improved education outcomes.

Education outcomes (matric pass rate)

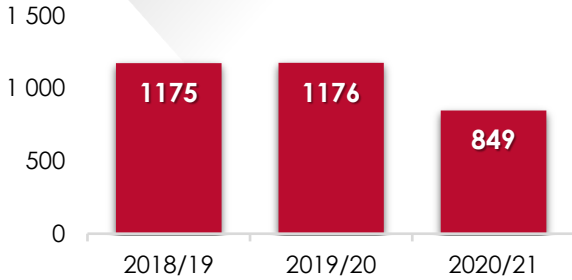
Education remains one of the key avenues through which the state is involved in the economy. In preparing individuals for future engagements in the labour market, policy decisions and choices in the sphere of education play a critical role in determining the extent to which future economic and poverty reduction plans may be realised. Education outcomes across the entire South Africa and Western Cape on general deteriorated as a result of COVID-19. The matric pass rate for Stellenbosch however increased ever so slightly from 85.0 per cent in 2019 to 85.1 per cent in 2020.

HEALTH



Tuberculosis

New patients registered for treatment

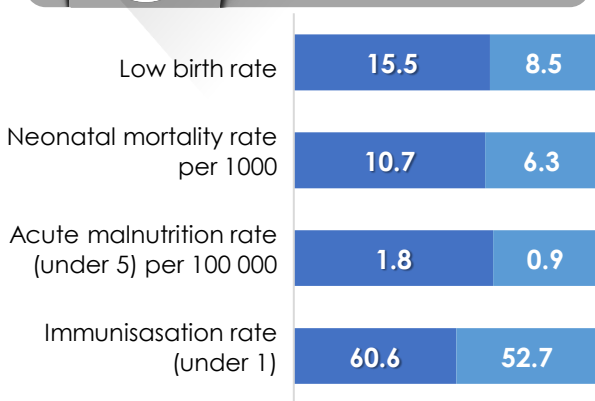


Maternal health

| | Maternal Mortality Rate | | Delivery rate to women under 20 years | | Termination of pregnancy rate | |
|-------------------------|-------------------------|--------------|---------------------------------------|-------------|-------------------------------|------------|
| | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 |
| Stellenbosch | 0.0 | 57.3 | 13.5 | 11.4 | 0.6 | 0.6 |
| Cape Winelands District | 42.7 | 118.3 | 15.1 | 13.6 | 0.8 | 0.7 |



Child health



■ Cape winelands ■ Stellenbosch



Healthcare facilities

| | | |
|------------------------------------|----|---|
| Regional hospitals | 2 | 0 |
| District hospitals | 4 | 1 |
| Community Day Centres | 5 | 1 |
| Community Health Centres | 0 | 0 |
| PHC Clinics (Satellite and Mobile) | 33 | 6 |
| PHC Clinics (Fixed) | 39 | 7 |

■ Cape Winelands

■ Stellenbosch



Emergency medical services

| Health Indicator | Stellenbosch | Cape Winelands |
|--|--------------|----------------|
| EMS operational | 6 | 38 |
| No of operational ambulances per 10 000 people | 3 | 2 |



HIV/AIDS

| Area | Registered patients receiving ART | | Number of new ART patients | |
|-------------------------|-----------------------------------|---------------|----------------------------|--------------|
| | 2019/20 | 2020/21 | 2019/20 | 2020/21 |
| Stellenbosch | 6960 | 6914 | 538 | 460 |
| Cape Winelands District | 32 366 | 32 949 | 3 434 | 2 825 |

Health

Healthcare facilities

In 2020, the Stellenbosch municipal area had 8 primary healthcare facilities, which comprised of 7 fixed clinics and 1 community day centre; there were also 6 mobile/satellite clinics. In addition to these primary healthcare facilities, there is also a district hospital, 9 ART treatment sites and 13 TB clinics.

HIV/AIDS

The number of clients (patients) that remain committed to their antiretroviral treatment (ART) plan in the Stellenbosch municipal area decreased by 46 patients between 2019/20 and 2020/21. In total, 6 914 registered patients received antiretroviral treatment in the Stellenbosch municipal area in 2020/21. In turn, the number of new patients receiving ART also declined from 538 in 2019/20 to 460 in 2020/21. There has been an average annual decline of 7.8 per cent between 2016/17 (1 173) and 2020/21 (849) in the number of registered patients receiving TB treatment in the Stellenbosch municipal area.

Child health

The immunisation coverage rate for children under the age of one in the municipal area declined slightly from 55.1 per cent in 2019/20 to 52.7 per cent in 2020/21. The overall CWD rate also declined from 63.1 to 60.6 per cent across the same period. The number of malnourished children under five years of age (severe acute malnutrition) per 100 000 people in the municipal area declined notably from 2.6 in 2019/20 to 0.9 in 2020/21. The Western Cape average from 1.6 to 0.9. The CWD rate also declined from 3.3 to 1.8 per cent. The neonatal mortality rate (deaths per 1 000 live births before 28 days of life) for the municipal area increased from 5.2 in 2019/20 to 6.3 in 2020/21. The rate was still notably below the CWD average of 10.7. A total of 8.5 per cent of all babies born in facility in the municipal area in 2020/21 weighed less than 2 500 grams. This is slightly worse than the 8.2 per cent recorded in 2019/20. This total was the lowest amongst all other local municipalities in the District.

Maternal health

In 2020/21, the Stellenbosch municipal area recorded the lowest number of maternal deaths (57.3) and teenage pregnancies (11.4 per cent) in the CWD. Although the number of teenage pregnancies decreased between 2019/20 and 2020/21, there was a significant deterioration in the maternal mortality rate (increase) in the municipal area. The termination of pregnancy rate (0.6 per cent) remained unchanged across this period.

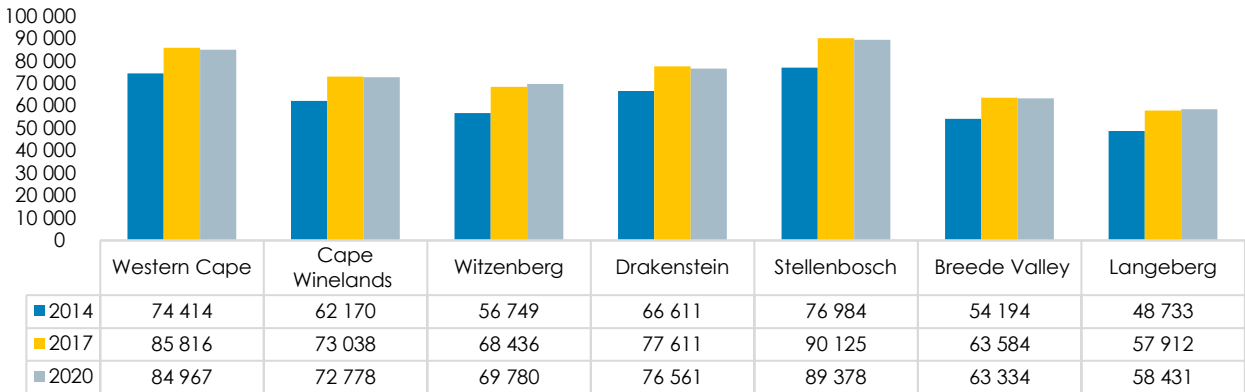
Emergency medical services

The provision of more operational ambulances can provide greater coverage of emergency medical services. The Stellenbosch municipal area had a total of 6 ambulances servicing the region, which translates to 3 ambulances per 10 000 people in 2020. This number only refers to Provincial ambulances and excludes all private service providers.

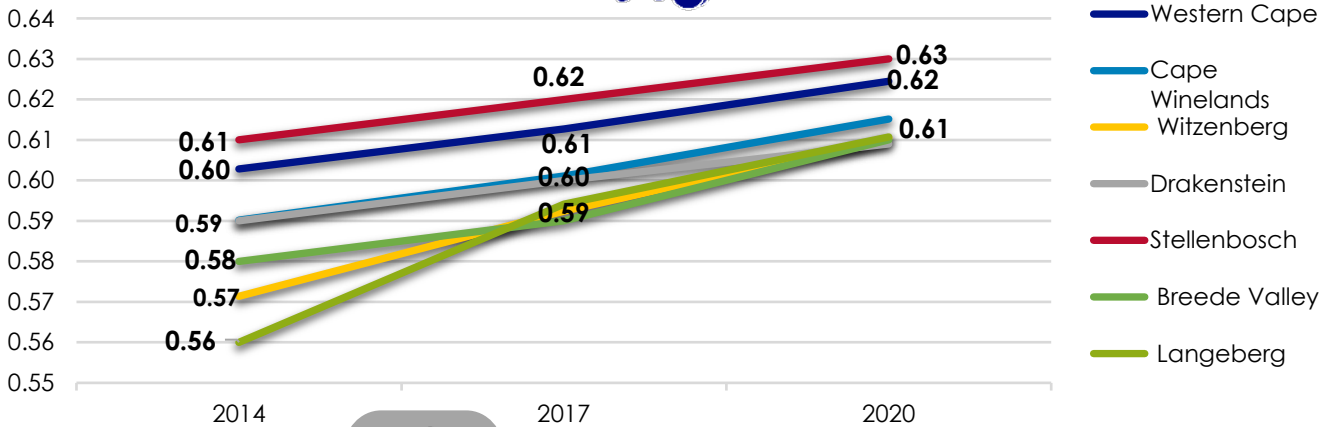
POVERTY



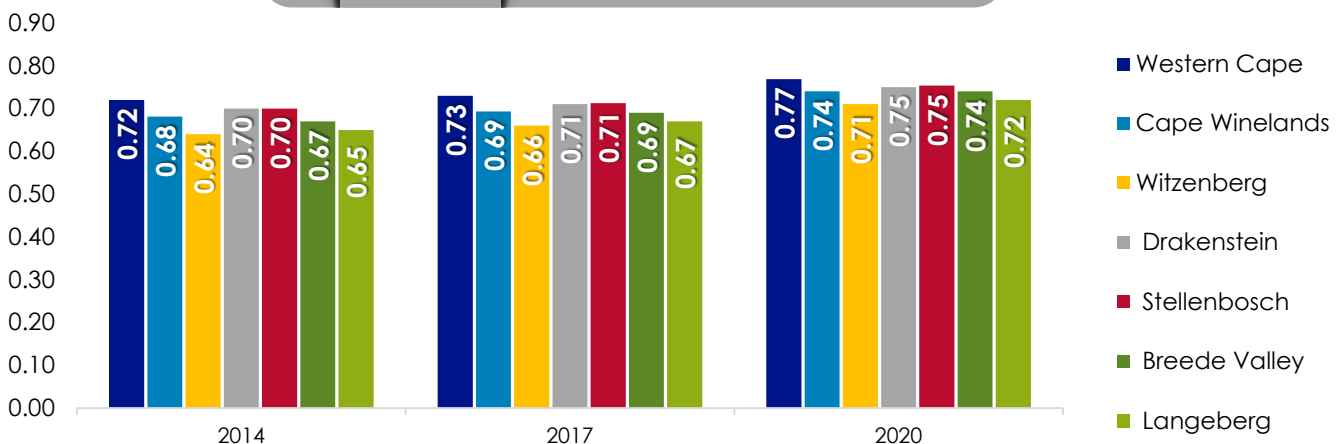
GDP per capita



Income inequality



Human development (HDI)



Poverty

GDPR per capita

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

GDPR per capita for the Stellenbosch municipal area was at R89 378 in 2020 (current prices) higher than the CWD (R72 778) and Western Cape (R84 967) averages. Constraint growth, coupled with growing population numbers, has resulted in a downward trend in GDPR per capita across most local municipal areas.

Income inequality

The National Development Plan (NDP) has set a target of reducing income inequality in South Africa from a Gini coefficient of 0.7 in 2010 to 0.6 by 2030. However, between 2014 and 2020, income inequality in the Stellenbosch municipal area has worsened, with the Gini-coefficient increasing from 0.614 in 2014 to 0.631 in 2020. Worsening income inequality was also observed across the CWD (0.590 in 2014 and 0.615 in 2020) as well as the Western Cape Province (0.603 in 2014 and 0.625 in 2020).

Human development

The Human Development Index (HDI) is a composite indicator reflecting on education levels, health, and income. It is a measure of peoples' ability to live a long and healthy life, to communicate, participate in the community and to have sufficient means to be able to afford a decent living. The HDI is represented by a number between 0 and 1, where 1 indicates a high level of human development and 0 represents no human development. The United Nations uses the HDI to assess the relative level of socio-economic development within countries.

An overall improvement in human development is observed across the entire Western Cape with HDI levels increasing in all districts between 2014, 2017 and 2020. It is interesting to note that despite general economic hardship impacting on households, the HDI score for the Stellenbosch municipal area increase significantly more in recent times i.e., HDI in Stellenbosch was 0.704 in 2014 and increased to 0.709 in 2017; the increase was however more pronounced in 2020 at 0.751. The HDI score for the municipal area was in 2020 higher than the CWD average of 0.740.

BASIC SERVICE DELIVERY



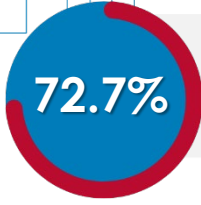
Total number of households

50 328

Stellenbosch Municipality

234 696

Cape Winelands District



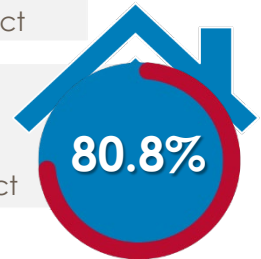
Formal main dwelling

36 592

Stellenbosch Municipality

189 559

Cape Winelands District



56.2% Stellenbosch
67.6% Cape Winelands

House/brick structure on separate stand/yard



0.6% Stellenbosch
0.6% Cape Winelands

Traditional dwelling



15.5% Stellenbosch
12.0% Cape Winelands

Flat/simplex/duplex/triplex or room/flat on shared property

1.4% Stellenbosch
1.2% Cape Winelands



1.0% Stellenbosch
1.2% Cape Winelands

House/flat/room in backyard



6.1% Stellenbosch
6.4% Cape Winelands

Informal dwelling in backyard



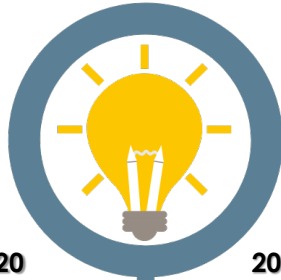
19.1% Stellenbosch
11.0% Cape Winelands

Informal dwelling not in backyard

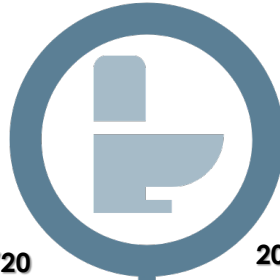
Other/Unspecified



2019/20



2019/20



2019/20



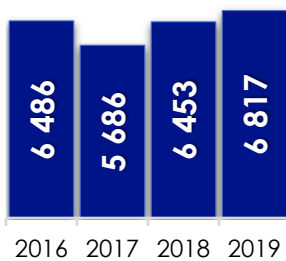
| Piped water inside dwelling/within 200m | |
|---|-------|
| Stellenbosch | 94.4% |
| Cape Winelands | 97.0% |

| Electricity as primary source of lighting | |
|---|-------|
| Stellenbosch | 92.2% |
| Cape Winelands | 92.3% |

| Flush/chemical toilet | |
|-----------------------|-------|
| Stellenbosch | 91.1% |
| Cape Winelands | 91.0% |

| Refuse removed at least once a week | |
|-------------------------------------|-------|
| Stellenbosch | 86.7% |
| Cape Winelands | 79.4% |

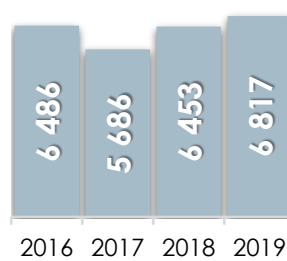
Free basic water



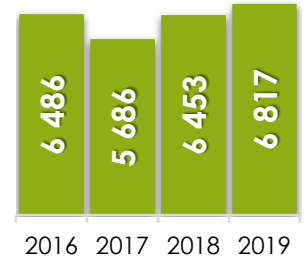
Free basic electricity



Free basic sanitation



Free basic refuse removal



Basic Service Delivery

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

This section considers to what extent this has been achieved by reflecting on the latest available information from Quantec Research for 2020. The latest official statistics was collected by Statistics South Africa for the 2016 Community Survey; the 2022 Census will provide the updated official statistics. The information on free basic services is obtained from Statistics South Africa's Non-Financial Census of Municipalities survey findings.

Housing and household services

With a total of 50 328 households in the Stellenbosch municipal area, 72.7 per cent had access to formal housing, the lowest access level when compared with other municipalities in the CWD area; the CWD average was 80.8 per cent. The municipal area also had the highest percentage of people living in informal settlements at 25.2 per cent. In comparison, 17.4 per cent of people across the CWD resided in informal settlements. Access levels to basic services in the municipal area were as follows in 2019:

- Piped water inside/within 200 m of the dwelling: 94.4 per cent
- Flush or chemical toilet: 91.1 per cent
- Electricity (for lighting): 92.2 per cent
- Refuse at least weekly by local authority: 86.7 per cent

While access to electricity and sanitation services were on par with the CWD average, access to piped water was notably below the district average. Access to refuse removal services were however above the District average.

Free basic services

According to the Department of Local Government, the number of registered indigent households in the Stellenbosch municipal area decreased from 6 813 in 2019 to 7 011 in 2020 (2.9 per cent increase). Municipalities provide a package of free basic services to households who are financially vulnerable and struggle to pay for services. The number of households receiving free basic services in the Stellenbosch municipal area has shown an overall increasing trend between 2017 and 2019. The stressed economic conditions continue to exert pressure on household income levels, which in turn is likely to see the number of indigent households and the demand for free basic services increase.

SAFETY AND SECURITY



| MURDER | | 2018/19 | 2019/20 | 2020/21 |
|---------------|-------------------------|---------|---------|---------|
| Actual Number | Stellenbosch | 69 | 76 | 70 |
| | Cape Winelands District | 356 | 398 | 365 |
| Per 100 000 | Stellenbosch | 37 | 39 | 36 |
| | Cape Winelands District | 38 | 42 | 38 |

| SEXUAL OFFENCES | | 2018/19 | 2019/20 | 2020/21 |
|-----------------|-------------------------|---------|---------|---------|
| Actual Number | Stellenbosch | 204 | 230 | 194 |
| | Cape Winelands District | 885 | 969 | 752 |
| Per 100 000 | Stellenbosch | 108 | 119 | 99 |
| | Cape Winelands District | 96 | 103 | 79 |



| DRUG-RELATED OFFENCES | | 2018/19 | 2019/20 | 2020/21 |
|-----------------------|-------------------------|---------|---------|---------|
| Actual Number | Stellenbosch | 2 553 | 2 157 | 1 252 |
| | Cape Winelands District | 11 181 | 7 864 | 5 337 |
| Per 100 000 | Stellenbosch | 1 353 | 1 119 | 639 |
| | Cape Winelands District | 1 208 | 834 | 559 |

| DRIVING UNDER THE INFLUENCE | | 2018/19 | 2019/20 | 2020/21 |
|-----------------------------|-------------------------|---------|---------|---------|
| Actual Number | Stellenbosch | 308 | 236 | 164 |
| | Cape Winelands District | 953 | 944 | 427 |
| Per 100 000 | Stellenbosch | 163 | 122 | 84 |
| | Cape Winelands District | 103 | 100 | 45 |



| | | | | |
|----------------------|--------------|----|----|----|
| Fatal Crashes | Stellenbosch | 34 | 34 | 31 |
| Road User Fatalities | Stellenbosch | 37 | 35 | 39 |



| RESIDENTIAL BURGLARIES | | 2018/19 | 2019/20 | 2020/21 |
|------------------------|-------------------------|---------|---------|---------|
| Actual Number | Stellenbosch | 1 358 | 1 239 | 904 |
| | Cape Winelands District | 5 776 | 5 518 | 4 537 |
| Per 100 000 | Stellenbosch | 720 | 643 | 461 |
| | Cape Winelands District | 624 | 586 | 475 |

Safety and Security

Murder

The number of actual murders in the Stellenbosch municipal area decreased from 76 in 2019/20 to 70 in 2020/21. This amounted to a decrease in the murder rate from 39 occurrences per 100 000 people to 36 (-9.2 per cent) which was still slightly below the District average of 38. In comparison, the Provincial average was 53 in 2020/21.

Sexual Offences

Sexual offences in the municipal area decreased by 17.1 per cent from 119 occurrences per 100 000 people in 2019/20 to 99 in 2020/21, but was still the highest amongst the various municipal areas of the District. Across the same period, the CWD sexual offences rate decreased from 103 occurrences per 100 000 people to 79 (23.4 per cent decline).

Drug-related Offences

Occurrences of drug related crimes declined significantly across the entire Western Cape - the drug-related crime rate in the Province decrease by 29.8 per cent from 890 occurrences per 100 000 people in 2019/20 to 625 in 2020/21. Mirroring this trend, the rate in the CWD decreased substantially from 834 to 559 (33.1per cent) while it decreased from 1 119 in 2019/20 to 639 in 2020/21. The municipal area had the second highest drug-related crime rate in the CWD.

Driving under the influence (DUI)

Restrictions on the sale of alcohol and limited personal movement outside of a person's dwelling were always going to impact on the number of reported cases of driving under the influence (DUI) and residential burglaries. The total number of DUI cases reported in the Stellenbosch municipal area decreased from 236 in 2019/20 to 164 in 2020/21. Expressed per 100 000 people, the DUI rate was 84 occurrences in 2020/21 (31.7 per cent decrease). The DUI rate in the CWD in turn declined by 55.4 per cent from 100 to 45 occurrences across the same period.

The number of road user fatalities in the Stellenbosch area decreased from 34 in 2019/20 to 31 in 2020/21. The number of fatal crashes decreased from 35 to 39 for the same reference period.

Residential Burglaries

Residential burglaries in the municipal area decreased sharply from 1 239 reported cases in 2019/20 to 904 in 2020/21. The burglary rate per 100 000 people subsequently decreased by 31.3 per cent from 643 occurrences in 2019/20 to 461 in 2020/21. Across the same period, the burglary rate in the CWD decreased by 18.9 per cent from 586 to 475 occurrences.

Economy and Labour Market Performance

| SECTOR | GDP | | | Employment | | |
|---|----------------------|-------------------|-----------------------|---------------------|-----------------------------------|------------------|
| | R Million value 2019 | Trend 2015 – 2019 | Real GDP growth 2020e | Number of jobs 2019 | Average annual change 2015 - 2019 | Net change 2020e |
| PS Primary Sector | 821.8 | -4.1 | 10.1 | 10 639 | 172 | -490 |
| Agriculture, forestry & fishing | 789.5 | -4.2 | 10.9 | 10 610 | 172 | -489 |
| Mining & quarrying | 32.2 | 0.2 | -18.4 | 29 | - 0 | -1 |
| SS Secondary sector | 3 908.1 | -0.6 | -12.9 | 11 825 | 26 | -1 081 |
| Manufacturing | 2 779.0 | -0.9 | -11.5 | 7 873 | - 8 | -601 |
| Electricity, gas & water | 247.2 | -0.4 | -6.4 | 155 | 3 | -3 |
| Construction | 881.9 | 0.7 | -19.8 | 3 797 | 31 | -477 |
| TS Tertiary sector | 12 029.2 | 1.9 | -6.3 | 55 985 | 1 149 | -3 088 |
| Wholesale & retail trade, catering & accommodation | 3 529.8 | 2.1 | -9.6 | 20 675 | 625 | -1 298 |
| Transport, storage & communication | 1 856.3 | 3.1 | -13.9 | 3 551 | 113 | -127 |
| Finance, insurance, real estate & business services | 3 634.3 | 2.4 | -4.2 | 13 509 | 365 | -644 |
| General government | 1 853.9 | -0.2 | -0.1 | 7 645 | -21 | 60 |
| Community, social & personal services | 1 154.9 | 0.7 | -2.8 | 10 605 | 66 | -1 079 |
| Stellenbosch | 16 759.1 | 0.9 | -6.7 | 78 449 | 1 346 | -4 659 |

| Skill Levels Formal employment | Skill Level Contribution 2020 (%) | Average growth (%) 2016 - 2020 | Number of jobs | |
|-----------------------------------|-----------------------------------|-----------------------------------|----------------|---------------|
| | | | 2019 | 2020 |
| Skilled | 24.4 | 0.4 | 13 818 | 13 254 |
| Semi-skilled | 43.5 | 0.5 | 24 883 | 23 607 |
| Low-skilled | 32.1 | -1.4 | 18 639 | 17 453 |
| TOTAL | 100.0 | -0.2 | 57 340 | 54 314 |

| Informal Employment | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Number of informal jobs | 19 913 | 19 790 | 19 904 | 21 110 | 21 546 | 22 950 | 21 214 | 22 239 | 21 851 | 21 109 | 19 476 |
| % of Total Employment | 30.6 | 29.9 | 29.3 | 29.9 | 30.0 | 30.2 | 28.0 | 28.7 | 27.9 | 26.9 | 26.4 |

| Unemployment rates | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---------------------|------------|-------------|-------------|------------|-------------|------------|-------------|-------------|-------------|-------------|-------------|
| Drakenstein | 13.1 | 13.4 | 13.1 | 12.7 | 13.1 | 12.1 | 13.1 | 13.7 | 13.6 | 14.5 | 14.1 |
| Langeberg | 6.4 | 6.6 | 6.5 | 6.2 | 6.5 | 5.6 | 6.4 | 6.7 | 6.7 | 7.3 | 7.3 |
| Stellenbosch | 9.8 | 10.1 | 10.0 | 9.7 | 10.1 | 9.3 | 10.3 | 10.7 | 10.7 | 11.6 | 11.3 |
| Witzenberg | 7.3 | 7.4 | 7.1 | 6.7 | 6.9 | 5.9 | 6.4 | 6.7 | 6.6 | 7.1 | 6.9 |
| Breede Valley | 10.3 | 10.6 | 10.3 | 9.8 | 10.2 | 9.1 | 10.0 | 10.4 | 10.3 | 11.1 | 10.7 |
| Cape Winelands | 10.1 | 10.3 | 10.1 | 9.7 | 10.0 | 9.1 | 10.0 | 10.4 | 10.3 | 11.1 | 10.8 |
| Western Cape | 15.9 | 16.1 | 16.1 | 16.0 | 16.4 | 16.5 | 17.7 | 18.4 | 18.3 | 19.6 | 18.9 |

Economy and Labour Market Performance

Sectoral Overview

In 2019, the economy of the Stellenbosch municipal area was valued at R16.759 billion (current prices) and employed 78 449 people. Historical trends between 2015 and 2019 indicate that the municipal area realised an average annual growth rate of 0.9 per cent which can mostly be attributed to the tertiary sector which registered a positive annual growth rate of 1.9 per cent. The economy is expected to contract by 6.7 per cent in 2020 with 4 659 jobs being shed.

In terms of sectoral contribution, the finance, insurance, real estate and business services (R3.634 billion), wholesale and retail trade, catering and accommodation (R3.530 billion) and the manufacturing (R2.779 billion) sectors were the main drivers that contributed to the positive growth. The former two sectors on average grew by 2.4 and 2.1 per cent respectively between 2015 and 2019, while the manufacturing sector declined by 0.9 per cent. The fastest growing sector across this period was however the transport, storage and communication sector (3.1 per cent). Except for agriculture, all sectors in the municipal area are expected to have contracted in 2020. The agriculture, forestry and fishing sector, which provides inputs for the manufacturing sector and purchases goods and services from a large portion of the tertiary sector industries, declined by 4.2 per cent between 2015 and 2019. The largest decline is anticipated to be observed in the construction sector which is expected to decline by 19.8 per cent.

The wholesale and retail trade, catering & accommodation (20 675); finance, insurance, real estate & business (13 509) and agriculture (10 610) sectors were in 2019 the largest sources of job creation. Although these sectors experienced positive average job creation between 2015 and 2019, all three are set to shed a significant number of jobs in 2020. The highest number of job losses are expected to be experienced in the wholesale and retail trade, catering & accommodation (-1 298) sector. General government is the only sector to experience job creation in 2020.

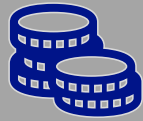
Formal and Informal Employment

It is estimated that total employment in the municipal area will in 2020 amount to 73 790 workers, of which 54 341 (73.6 per cent) are in the formal sector while 19 476 (26.4 per cent) are informally employed. Most of the formally employed consisted of semi-skilled (43.5 per cent) and low-skilled (32.1 per cent) workers. Average annual growth in the skilled (0.4 per cent) and semi-skilled (0.5 per cent) categories were relatively equal while low-skilled employment contracted at an average annual rate of 1.4 per cent. The growth in the skilled cohort reflects the market demand for more skilled labour and the ability to sustain and slightly expand the demand for skilled employment even during times of economic hardship. The growth in the skilled and semi-skilled cohorts evidently reflect the need to capacitate and empower low-skilled workers in order to be absorbed in the labour market. Overall, formal and informal employment contracted by 0.4 and 2.1 per cent respectively between 2016 and 2020.

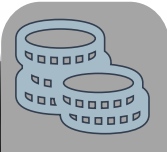
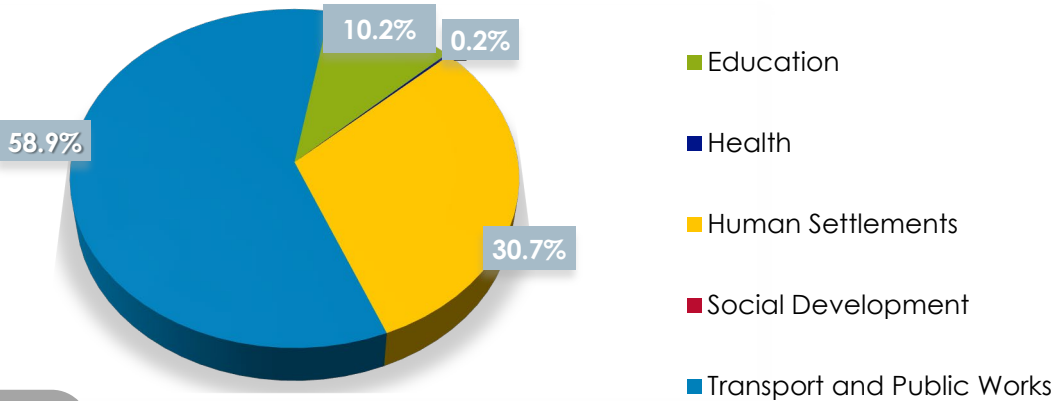
Unemployment

Despite above mentioned decline in total employment, the unemployment rate for the municipal area slightly improved from 11.6 per cent in 2019 to 11.3 in 2020. The unemployment rate was however still the second highest in the CWD (10.8 per cent). This is particularly concerning given that the estimate is based on the narrow definition of unemployment i.e. the percentage of people that are able to work, but unable to find employment. In turn, the broad definition generally refers to people that are able to work, but not actively seeking employment (excludes those who have given up looking for work).

PUBLIC INFRASTRUCTURE SPEND



Provincial infrastructure spend



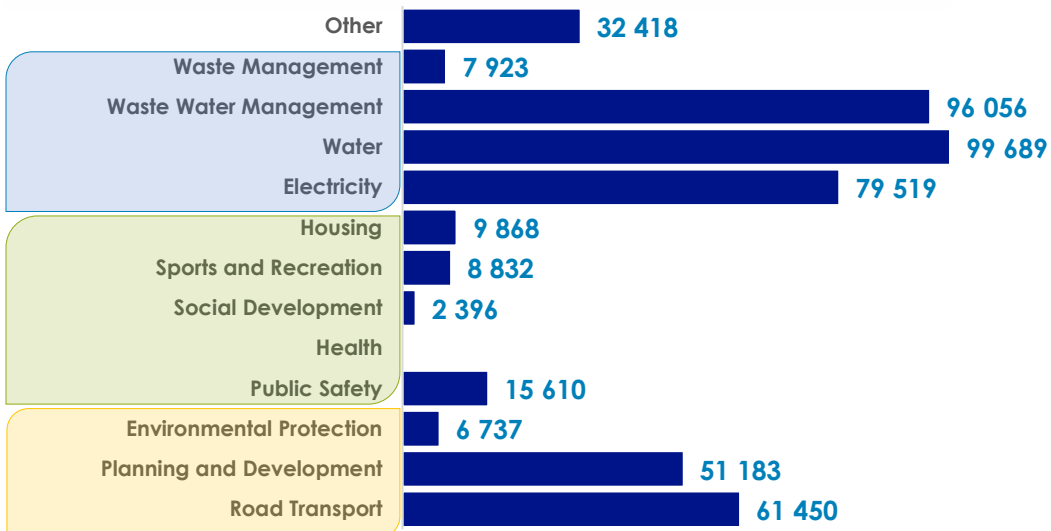
Municipal infrastructure spend (R'000)

Trading Services
60%



Social Infrastructure
8%

Economic Infrastructure
25%



Public Infrastructure Spend (2021/22)

The following section reflects on provincial and municipal infrastructure spending priorities within the Stellenbosch municipal area for 2021/22

Social Infrastructure

Spending on social infrastructure aids in social development and has the spill-over effect of enabling economic growth. A total of 41.1 per cent of the total WCG infrastructure allocation towards the Stellenbosch municipal area will be spent on social infrastructure. As displayed in the pie chart, the WCG will be spending 10.2 per cent (R17.0 million) of the total infrastructure budget in the municipal area on the Education function. Spending on education is crucial as it can serve to improve education outcomes and skills levels within a community, and more importantly alleviate poverty through increased long-term income for individuals. A healthy and resilient community increases productivity and reduces pressures on government resources. The WCG will in 2021/22 spend R344 000 on Health-related infrastructure within the municipal area. An allocation has also been made by the WCG towards the Housing function (R51.4 million; 25.1 per cent) to improve the quality of life of individuals within the municipal area. The Municipality allocated R9.9 million towards the Housing function.

Community safety is a cornerstone of the Western Cape Economic Recovery Plan. Crime has a negative impact on the quality of lives of individuals, but also on the economy by deterring private investment and causing business losses. It further creates a burden on government resources in terms of justice system costs, victim assistance and replacement of assets. The Municipality has as such allocated R15.6 million (3.3 per cent) of its capital budget towards the Public Safety function.

Economic Infrastructure

Economic infrastructure is defined as infrastructure that promotes economic activity. Considering the sluggish economic growth throughout the Country, spending on economic infrastructure is crucial to stimulating economic activity. The WCG will in 2020/21 spend R98.6 million on economic infrastructure, more specifically towards road transport and public works. Road transport infrastructure goes a long way towards unlocking the region's economic potential, especially due to it having the largest natural port in Africa and being a tourist destination. The Municipality assists in this regard with its own contribution of R61.5 million (13.0 per cent of total municipal infrastructure spending) towards road transport.

Trading Services

Basic services are crucial to improving the living conditions of citizens within the municipal area and enabling economic activity for businesses via access to water, electricity, sanitation and refuse removal. The Municipality will in 2021/22 channel R283.2 million towards trading services to reduce backlogs, improve service delivery standards, provide for future residential developments and to roll-out basic services to informal settlements. The 2021/22 trading services budget is mostly focused on water (R100.0 million; 35.2 per cent), wastewater management (R96.1 million; 33.9 per cent) and electricity services (R79.5 million; 28.1 per cent). A smaller allocation of R7.9 million (2.8 per cent) has been made towards the solid waste management function.

SOURCES

1. Demographics

- Population: *Department of Social Development, 2021*
- Sex ratio: *Department of Social Development, 2021*
- Age cohorts: *Department of Social Development, 2021*
- Number of households: *Department of Social Development, 2021*
- Household size: *Department of Social Development, 2021*
- Population density: *Department of Social Development, 2021*

2. Education

- Learner enrolment: *Western Cape Education Department, 2020; Annual Survey of Public and Independent Schools (ASS), 2021*
- Learner-teacher ratio: *Western Cape Education Department, 2020; Annual Survey of Public and Independent Schools (ASS), 2021*
- Learner retention: *Western Cape Education Department, 2020; Annual Survey of Public and Independent Schools (ASS), 2021*
- Educational facilities: *Western Cape Education Department, 2020; Annual Survey of Public and Independent Schools (ASS), 2021*
- No-fee schools: *Western Cape Education Department, 2020; Annual Survey of Public and Independent Schools (ASS), 2021*
- Schools with libraries: *Western Cape Education Department, 2020; Annual Survey of Public and Independent Schools (ASS), 2021*
- Educational outcomes: *Western Cape Education Department, 2020; Annual Survey of Public and Independent Schools (ASS), 2021*

3. Health

- Healthcare facilities: *Department of Health, 2021*
- Emergency medical services: *Department of Health, 2021*
- HIV/AIDS: *Department of Health, 2021*
- Tuberculosis: *Department of Health, 2021*
- Child health: *Department of Health, 2021*
- Maternal health: *Department of Health, 2021*

4. Poverty

- GDP per capita: *Statistics South Africa, 2021*
- Income Inequality (Gini-coefficient): *Quantec Research, 2021*
- Human Development (Human Development Index): *Quantec Research, 2021*

SOURCES

5. Basic services

- Households: Quantec Research, 2021
- Access to housing: Quantec Research, 2021
- Access to water: Quantec Research, 2021
- Access to electricity: Quantec Research, 2021
- Access to sanitation: Quantec Research, 2021
- Access to refuse removal: Quantec Research, 2021
- Free Basic Services: *Statistics South Africa, Non-Financial Census of Municipalities 2020*

6. Safety and security

- Murder: *South African Police Service (SAPS), 2021, own calculations*
- Sexual offences: *South African Police Service (SAPS), 2021, own calculations*
- Drug-related crimes: *South African Police Service (SAPS), 2021, own calculations*
- Driving under the influence: *South African Police Service (SAPS), 2021, own calculations*
- Residential burglaries: *South African Police Service (SAPS), 2021, own calculations*
- Road user fatalities: *Department of Transport and Public Works, 2021*

7. Economy

- Sector Performance: *Quantec Research, 2021*
- Employment growth per sector: *Quantec Research, 2021*
- Trends in labour force skills: *Quantec Research, 2021*
- Unemployment rates: *Quantec Research, 2021*

8. Public infrastructure spend

- Provincial Infrastructure Spend: *Estimates of Provincial Revenue and Expenditure (EPRE), 2021; Overview of Adjusted Provincial and Municipal Infrastructure Spend (OAPMII), 2021*
- Municipal Infrastructure Spend: *2021/22 adjustments budget (August 2021); MBRR B-Schedule Table B5.*