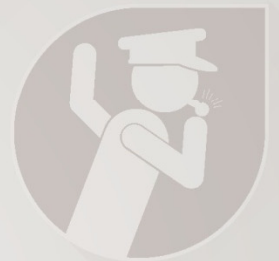




Western Cape
Government



Stellenbosch Municipality

2018



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Stellenbosch: At a Glance

Demographics

Population Estimates, 2018; Actual households, 2016



Population

186 730



Households

52 374

Education

2017



Matric Pass Rate 85.5%

Learner-Teacher Ratio 32.7

Gr 12 Drop-out Rate 25.6%

Poverty

2017



Gini Coefficient 0.63

Human Development Index 0.72

Health

2017/18



Primary Health Care Facilities

13

Immunisation Rate

70.1%

Maternal Mortality Ratio (per 100 000 live births)

0.0

Teenage Pregnancies - Delivery rate to women U/18

15.2%

Safety and Security

Actual number of reported cases, 2018



Residential Burglaries

1 525

DUI

189

Drug-related Crimes

2 724

Murder

58

Sexual Offences

201

Access to Basic Service Delivery

Percentage of households with access to basic services, 2016



Water

98.5%

Refuse Removal

71.0%



Electricity

98.1%



Sanitation

90.9%



Housing

65.1%



Road Safety

2017

Fatal Crashes 32

Road User Fatalities 34

Labour

2017

Unemployment Rate

11.0%



Socio-economic Risks

Risk 1 Slow Economic Growth

Risk 2 Increasing population & demand for services

Risk 3 Rising Unemployment

Largest 3 Sectors

Contribution to GDP, 2016

Finance, insurance, real estate and business services

21.6%

Wholesale and retail trade, catering and accommodation

20.0%

Manufacturing

17.1%

1

DEMOGRAPHICS

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

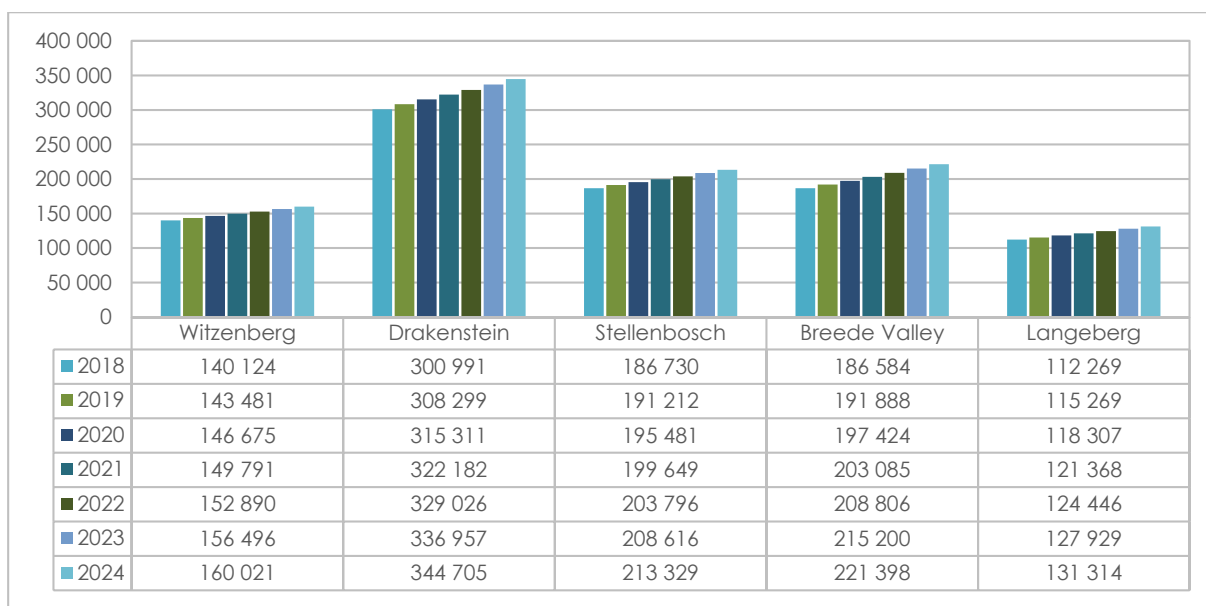
This chapter provides a concise, yet meaning full overview, of key demographic variables that will assist with municipal planning and budgeting, namely estimates of population size, the distribution of population projections within age cohorts as well as dependency ratios.

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

Data source: Department of Social Development, 2018



POPULATION



According to the Department of Social Development's 2018 projections, Stellenbosch currently has a population of 186 730, rendering it the second largest municipal population within the Cape Winelands District. This total is estimated to increase to 213 329 by 2024 which equates to average annual growth of a 2.2 per cent over this period. The estimated population growth rate of Stellenbosch is therefore slightly below the estimated population growth of the Cape Winelands of 2.4 per cent.

AGE COHORTS

Year	Children: 0 – 14 Years	Working Age: 15 – 64 Years	Aged: 65 +	Dependency Ratio
2011	35 544	112 533	7 652	38.4
2019	43 478	133 357	14 376	43.4
2024	47 132	148 159	18 037	44.0

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

A comparison between the 2011 and 2019 estimate shows an increase in the dependency ratio from a relatively low 38.4 in 2011 to 43.4 in 2019; this is projected to increase further to 44.0 in 2024. This is mainly attributed to a rise in the aged population during the 2011 - 2019 and 2019 - 2024 periods.

2

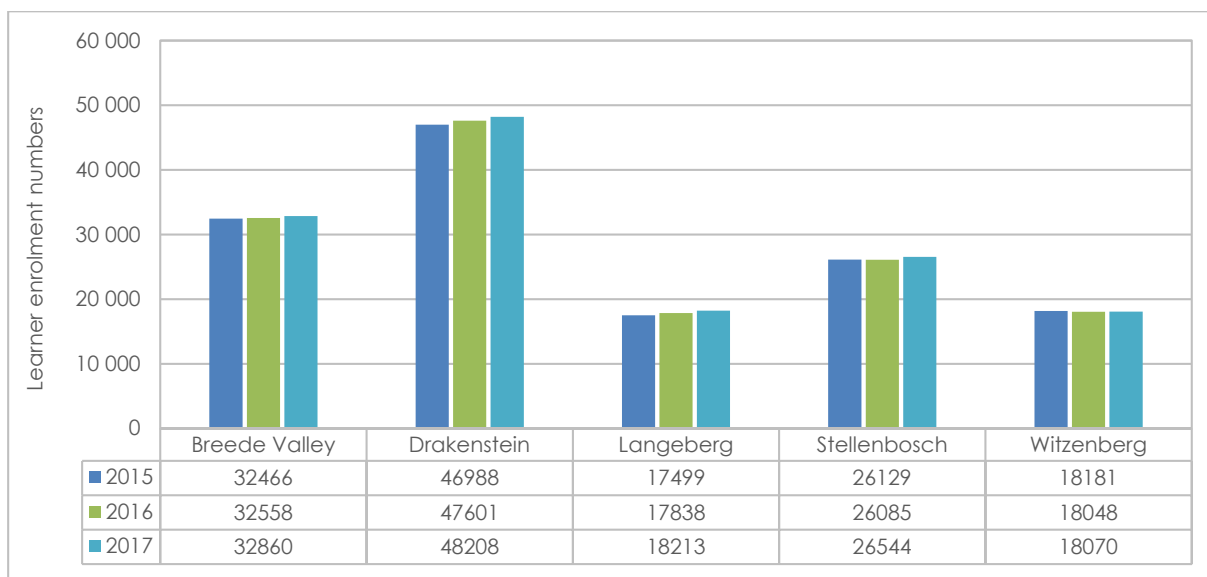
EDUCATION

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

Data source: Western Cape Education Department, 2018

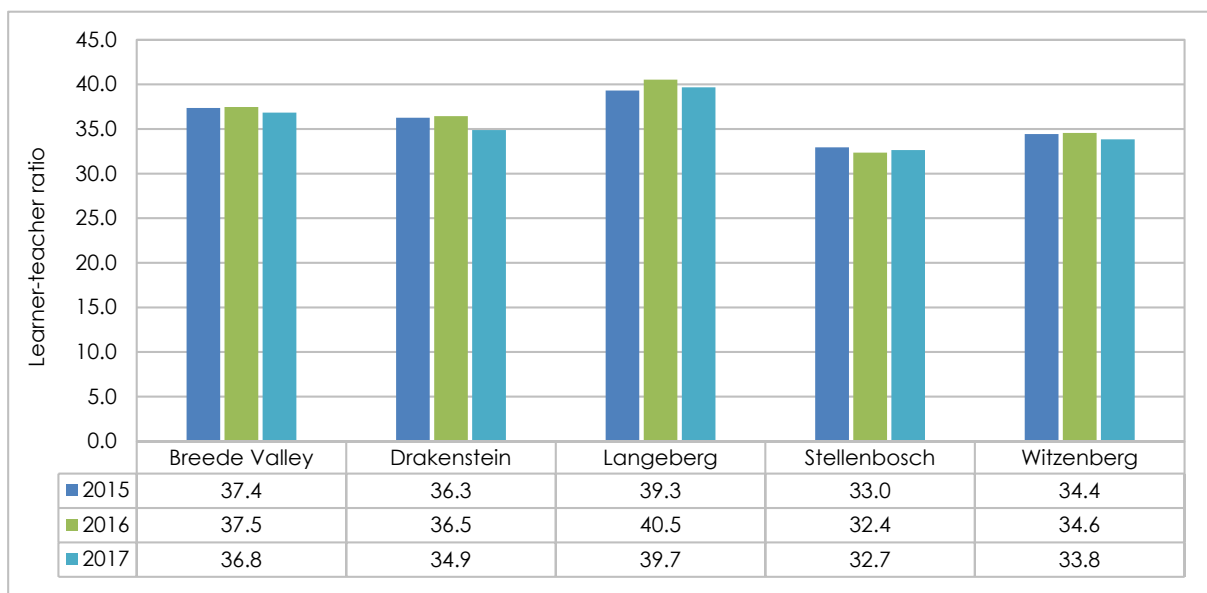


LEARNER ENROLMENT



Learner enrolment in Stellenbosch grew from 26 129 in 2015 to 26 085 in 2016 and increased further to 26 544 learners in 2017. This could be attributed to a number of factors including demographics and socio-economic context.

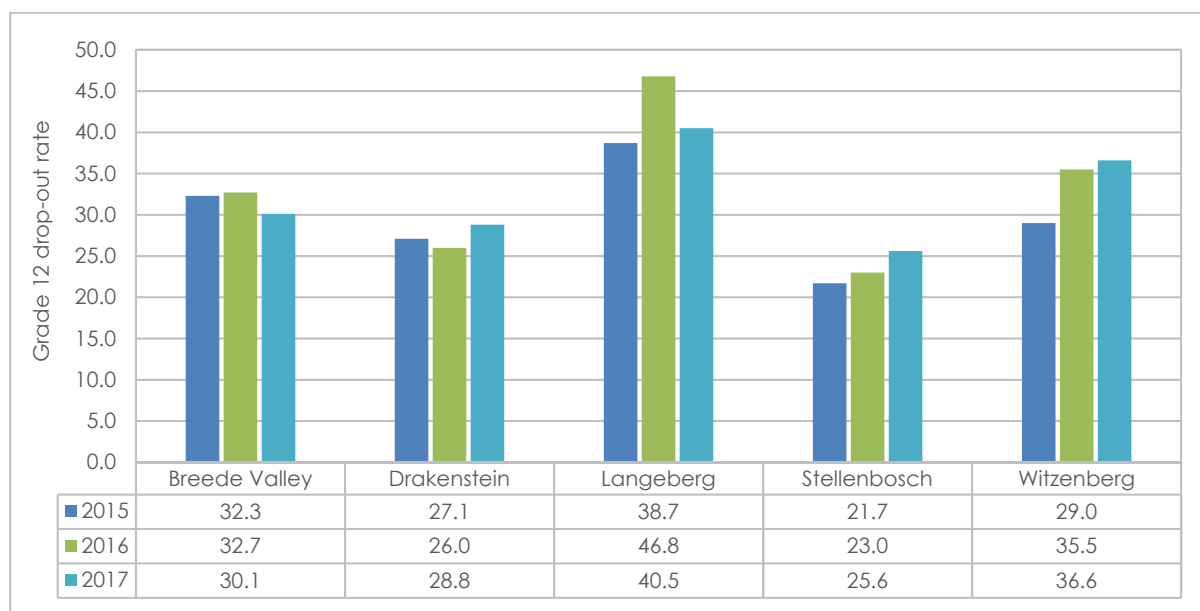
LEARNER-TEACHER RATIO



Changes in the learner teacher ratio can affect learner performance. The learner-teacher ratio in the Stellenbosch municipal area decreased from 33.0 in 2015 to 32.4 in 2016 and up again to 32.7 in 2017. Stellenbosch has the lowest learner-teacher ratio in the District, which bodes well for educational outcomes. Factors influencing the learner-teacher ratio include the ability of schools to employ more educators when needed and the ability to collect fees.

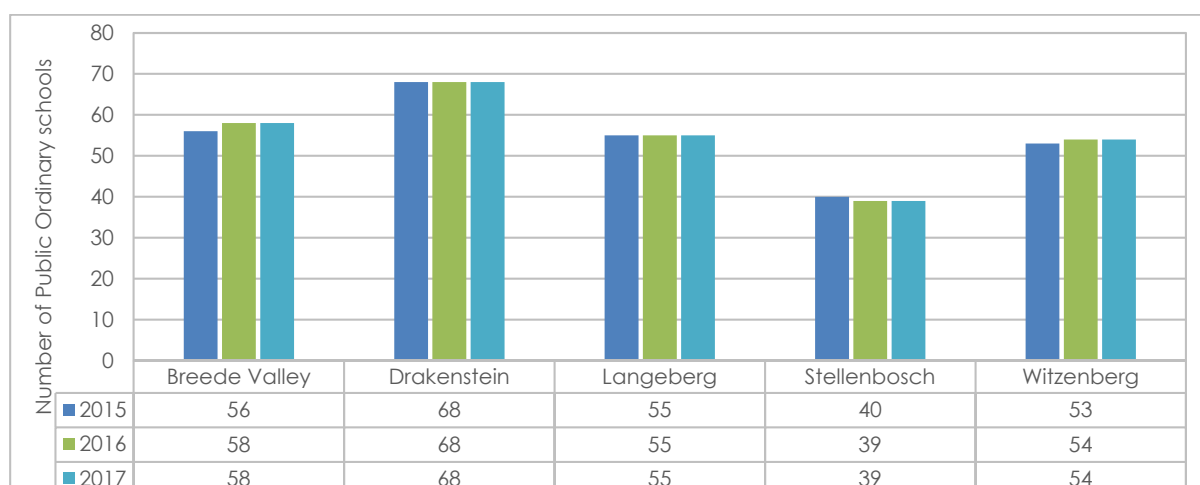
GRADE 12 DROP-OUT RATES (%)

The drop-out rates for learners within Stellenbosch municipal area increased from a low 21.7 per cent in 2015 to 23.0 per cent in 2016, increasing further to 25.6 per cent in 2017. These high levels of drop-outs are influenced by a wide array of socio-economic factors including unemployment, poverty and teenage pregnancies.



PUBLIC SCHOOLS

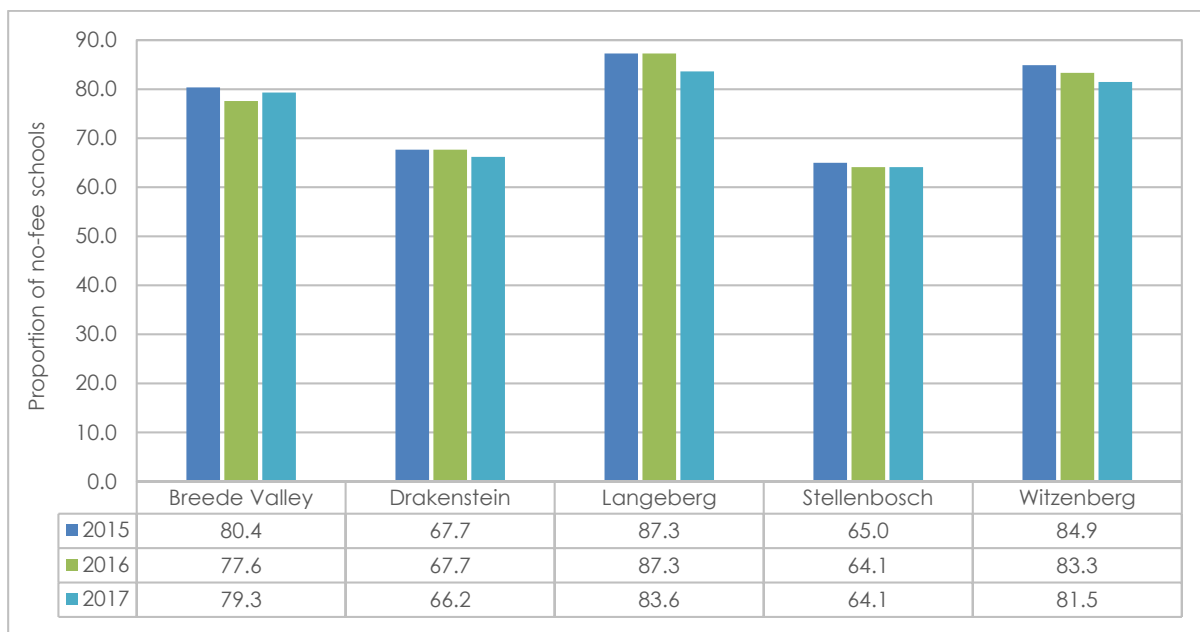
The increased availability of adequate education facilities such as schools, Further Education and Training (FET) colleges and schools equipped with libraries/media centres could positively affect academic outcomes.



In 2017, the Stellenbosch area had a total of 39 public ordinary schools, down one from 40 in 2015. Within the tough economic climate, schools in general have been reporting an increase in parents being unable to pay their school fees.

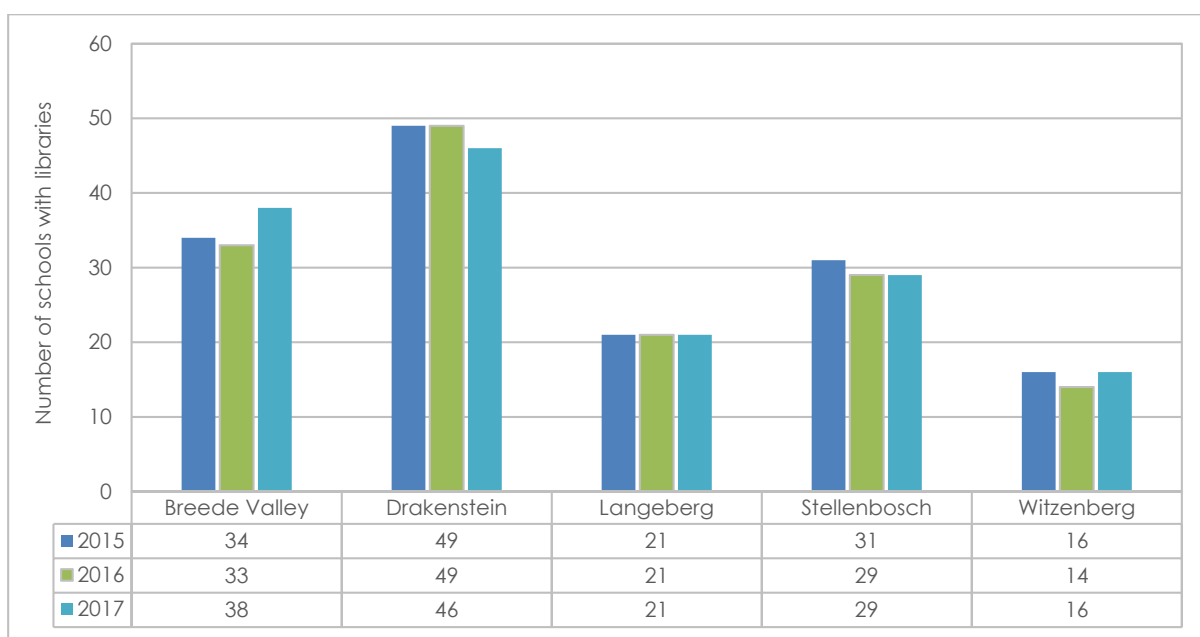
NO-FEE SCHOOLS

The proportion of no-fee schools within the Stellenbosch municipal area decreased slightly from 65.0 per cent in 2015 to 64.1 per cent in 2016 and 2017.



SCHOOLS WITH LIBRARIES

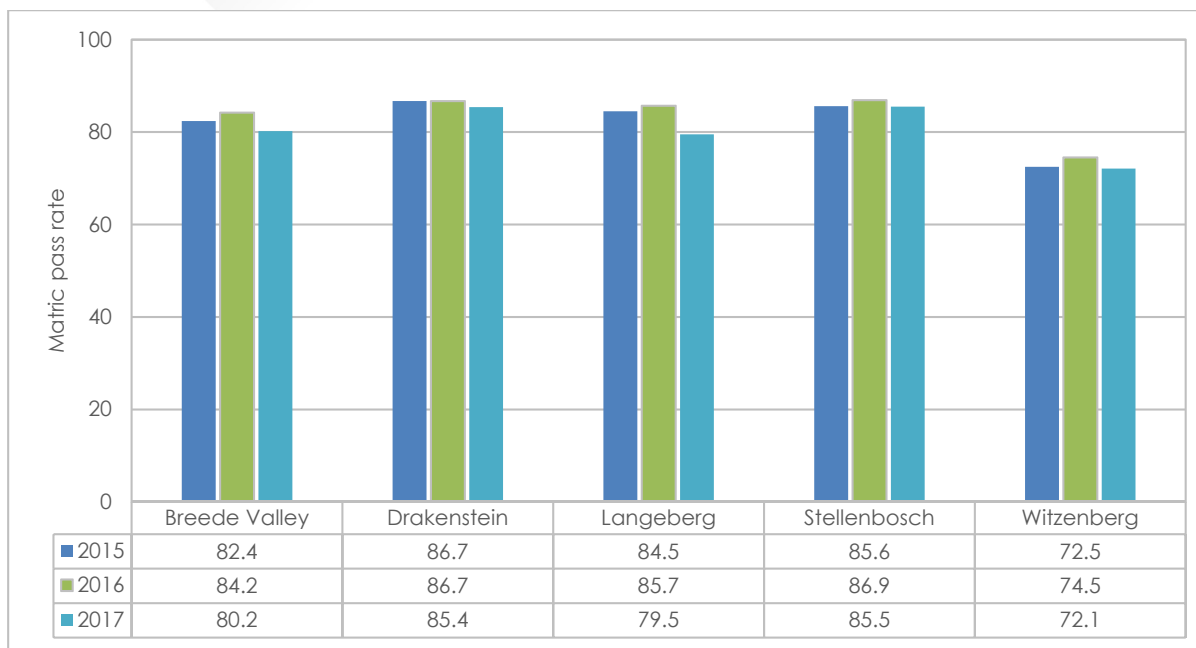
The number of schools equipped with libraries decreased from 31 in 2015 to 29 in 2016; it remained at 29 in 2017.



EDUCATION OUTCOMES



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



The matric pass rate in Stellenbosch increased from 85.6 per cent in 2015 to 86.9 per cent in 2016; in 2017 it dropped back again to 85.5 per cent, just below its 2015 level. Better results could improve access for learners to higher education to broaden their opportunities. The 2017 matric pass rate for the Stellenbosch area was the highest within the Cape Winelands District.

3

HEALTH

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

Data source: Department of Health, 2018



HEALTHCARE FACILITIES

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

Area	PHC Clinics		Community Health Centres	Community Day Centres	Hospitals		Treatment Sites	
	Fixed	Non-fixed			District	Regional	ART Clinics	TB Clinics
Stellenbosch	7	6	0	1	1	0	8	15
Cape Winelands District	39	33	0	6	4	2	49	100

In terms of healthcare facilities, in 2017/18, Stellenbosch municipal area had 7 fixed clinics and 6 mobile primary healthcare clinics. In addition, there was also 1 community day centre, 1 district hospital as well as 8 ART and 15 TB treatment clinics/sites.

In terms of changes when compared with the previous year, there was 1 less mobile/satellite clinic and 1 less ART clinic/treatment site than in 2016/17.

EMERGENCY MEDICAL SERVICES



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

Provision of more operational ambulances can provide greater coverage of emergency medical services. Stellenbosch municipal area had 2.0 ambulances per 10 000 inhabitants in 2017 which is below the District average of 2.3 ambulances per 10 000 people. It is worth noting that this number only refers to Provincial ambulances and excludes all private service providers.

HIV/AIDS

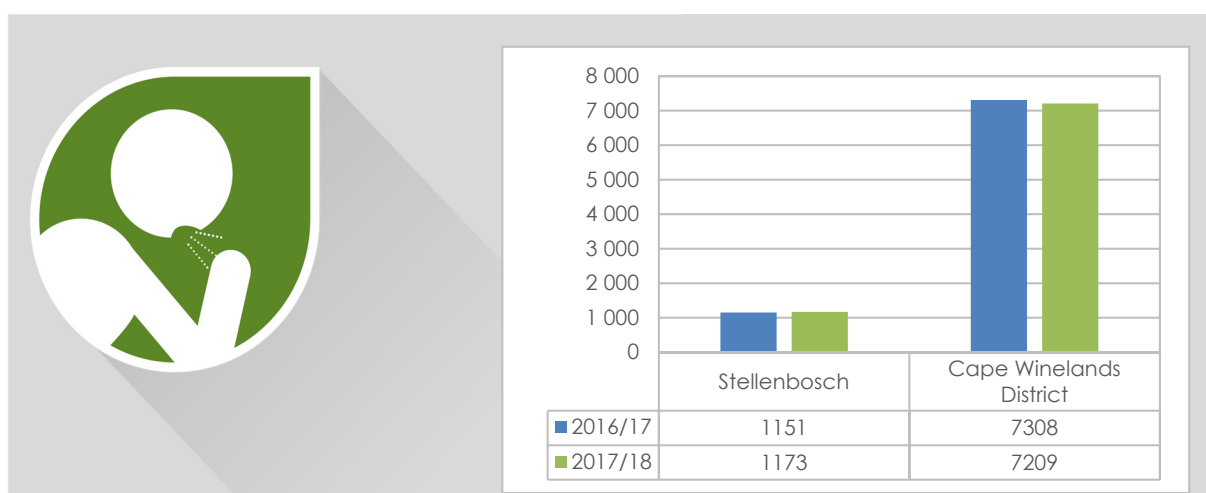
HIV/AIDS management is crucial given its implications for the labour force and the demand for healthcare services.

Area	Registered patients receiving ART		Number of new ART patients		HIV Transmission Rate	
	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18
Stellenbosch	5 167	5 702	727	801	0.0	0.3
Cape Winelands District	27 162	29 136	5 097	4 679	1.5	0.4

Stellenbosch municipal area's total registered patients receiving ARTs has been steadily rising. Patients receiving antiretroviral treatment increased by 535 between 2016/17 to 2017/18. The 5 702 patients receiving antiretroviral treatment are treated at 8 clinics/treatment sites. A total of 29 136 registered patients received antiretroviral treatment in Cape Winelands District in 2017/18. Stellenbosch, with 5 702 patients represent 19.6 per cent of the patients receiving ART in Cape Winelands District.

The number of new antiretroviral patients increased to 801 in 2017/18 from 727 in 2016/17. The HIV transmission rate for Stellenbosch showed a deterioration to 0.3 per cent in 2017/18, in contrast to the District's transmission rate which improved to from 1.5 per cent in 2016/17 to 0.4 per cent in 2017/18.

TUBERCULOSIS (TB)



Between 2016/17 and 2017/18, Stellenbosch experienced an increase in tuberculosis (TB) cases. Stellenbosch, with 1 173 TB patients in 2017/18 represents 16.3 per cent of the TB patients who are treated in the treatment sites in the Cape Winelands. Stellenbosch's TB patients are treated in 15 TB clinics or treatment sites.

CHILD HEALTH

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

Area	Immunisation Rate		Malnutrition		Neonatal Mortality Rate		Low birth weight	
	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18
Stellenbosch	76.9	70.1	1.9	2.6	1.8	5.6	72.7	96.0
Cape Winelands District	65.3	73.9	3.6	4.7	6.6	9.5	143.4	159.8

The immunisation rate in the Stellenbosch area has declined from 76.9 per cent in 2016/17 to 70.1 per cent in 2017/18.

The number of malnourished children under five years (per 100 000 people) in Stellenbosch in 2016/17 was 1.9, increasing to 2.6 in 2017/18. At 2.6, Stellenbosch's rate is better than the District average of 4.7.

Neonatal mortality rate (NMR) (deaths per 1 000 live births) in the Stellenbosch area has deteriorated from 1.8 in 2016/17 to 5.6 in 2017/18. A rise in the NMR may indicate deterioration in new-born health outcomes, or it may indicate an improvement in the reporting of neonatal deaths.

The low birth weight indicator for the Stellenbosch area has deteriorated (from 72.7 to 96.0 per cent) between 2016/17 and 2017/18.

DEFINITIONS

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

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

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

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

MATERNAL HEALTH

Area	Maternal Mortality Rate		Delivery Rate to Women under 20 years		Termination of Pregnancy Rate	
	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18
Stellenbosch	0.0	0.0	4.5	15.2	0.2	0.3
Cape Winelands District	0.1	0.0	6.6	13.4	0.6	0.6

The maternal mortality rate in the Stellenbosch remained at zero in 2016/17 and 2017/18; the Cape Winelands District rate moved from 0.1 to zero deaths per 100 000 live births between 2016/17 and 2017/18.

Stellenbosch's delivery rate to women under 20 years has deteriorated from 4.5 per cent in 2016/17 to 15.2 per cent in 2017/18; the broader Cape Winelands District rate has deteriorated from 6.6 per cent in 2016/17 to 13.4 per cent in 2017/18. This is of concern as these are teenagers who are of school going age and could lead to high dropout rates at schools in the Stellenbosch and Cape Winelands District areas.

The termination of pregnancy rate for the Stellenbosch area increased slightly from 0.2 per cent in 2016/17 to 0.3 per cent in 2017/18; it remained steady at 0.6 per cent for 2016/17 and 2017/18 for the Cape Winelands District area.

DEFINITIONS

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

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

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

4

POVERTY

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

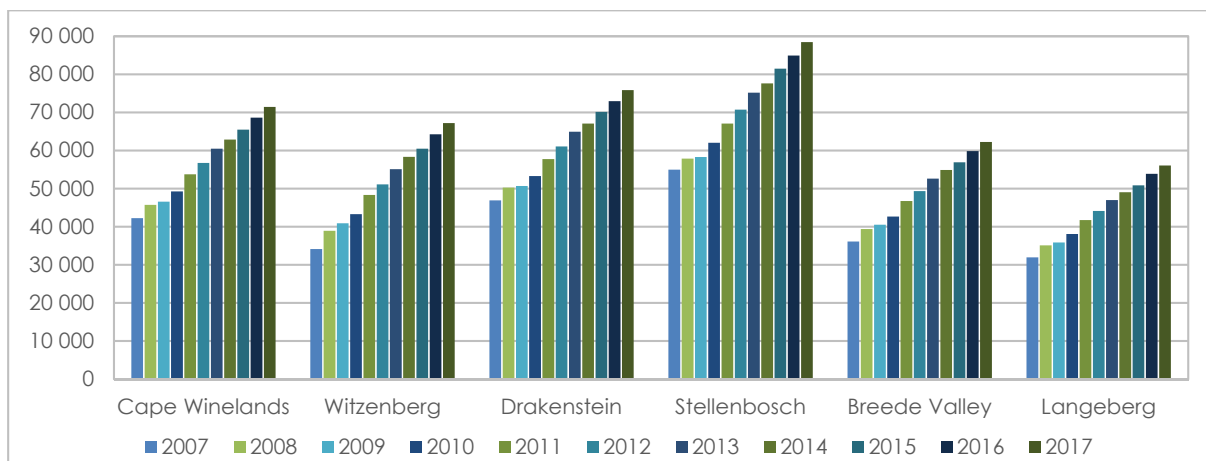
The deteriorating financial health of households and individuals under the weight of economic pressures, specifically between 2011 and 2015, has resulted in an increase in the poverty levels, according to the Poverty Trends in South Africa report released by Statistics South Africa in 2017. The report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

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



GDPR PER CAPITA

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

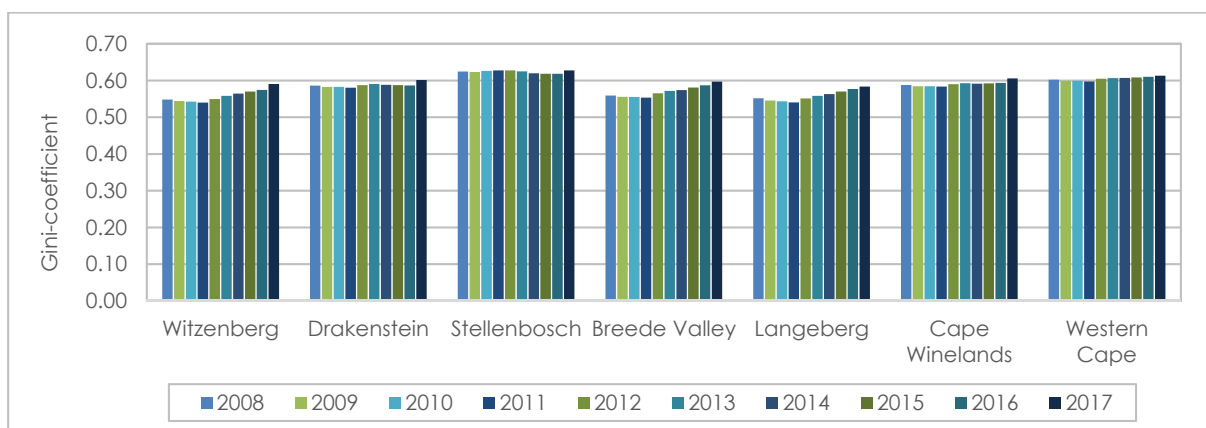


Source: Stats SA 2017, own calculations

At R88 431 in 2017, Stellenbosch municipal area's real GDP per capita is significantly above that of the Cape Winelands District's figure of R71 426 as well as slightly above that of the Western Cape (R87 110).

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. Income inequality in the Stellenbosch municipal area has generally increased between 2008 and 2011, decreasing to 2015 before picking up again, reaching 0.63 in 2017. For the entire period it has been beyond the NDP's 0.6 target and the increasing trend could see it moving further beyond this level.

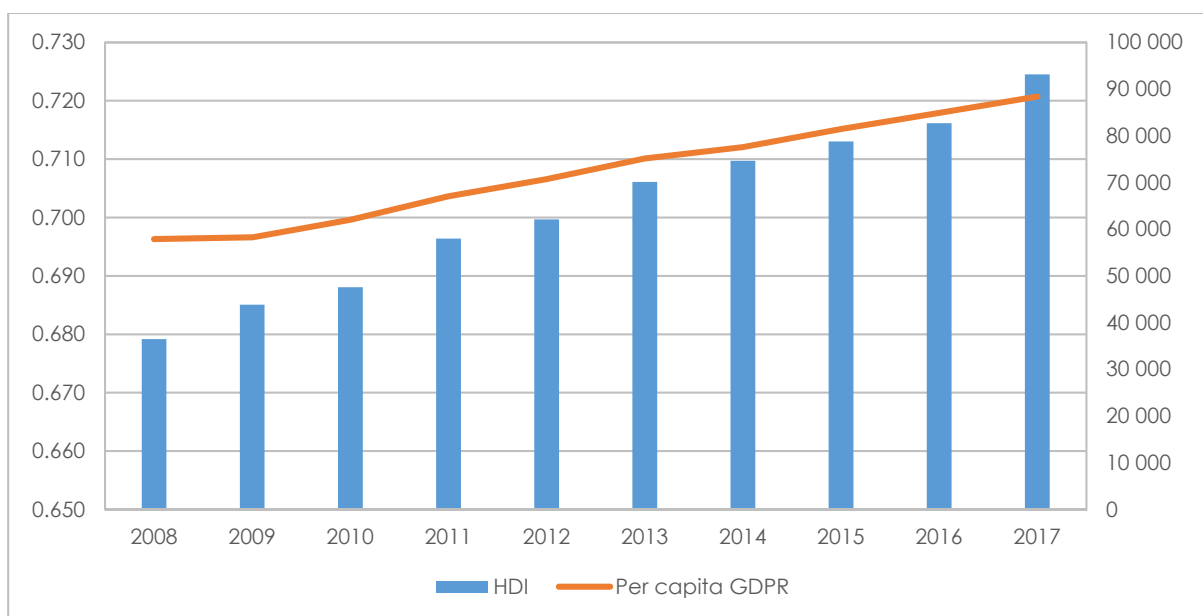


Source: Global Insight, 2017

Income inequality levels were higher in Stellenbosch than in the Cape Winelands District and the Western Cape.

HUMAN DEVELOPMENT

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



Source: Global Insight, 2017

There has been a general increase in the HDI of Stellenbosch Municipality, the Cape Winelands District as well as for the Western Cape between since 2008, with the index reaching 0.72 in Stellenbosch, 0.71 in the Cape Winelands District, and 0.73 in the Province. Naturally, per capita income as per definition is expected to mimic the trend of HDI and this is clearly displayed in the graphic above.

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

5

BASIC SERVICE DELIVERY

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

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



ACCESS TO SERVICES AND HOUSING

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

The table below indicates access to housing and services in the Stellenbosch municipal area. With a total of 52 374 households, only 65.1 per cent have access to formal housing.

Community Survey 2016	Stellenbosch	Cape Winelands District
Total number of households	52 374	236 006
Formal main dwelling	34 071	191 077
	65.1%	81.0%
Water (piped inside dwelling/within 200 m)	51 581	232 605
	98.5%	98.6%
Electricity (primary source of lighting)	51 386	228 650
	98.1%	96.9%
Sanitation (flush/chemical toilet)	47 594	218 483
	90.9%	92.6%
Refuse removal (at least weekly)	37 207	192 974
	71.0%	81.8%

Access to water, electricity and sanitation services were however significantly higher than this at 98.5 per cent, 98.1 per cent and 90.9 per cent respectively while household access to refuse removal services was at 71.0 per cent. With the exception of refuse removal service, these figures are on par or above that of the Cape Winelands District.

SERVICES GROWTH

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

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

Water Services

Growth in domestic and non-domestic consumer/billing units for water services was exceptionally fast over the 2007 – 2017 period, recording average year-on-year growth of 9.6 per cent. This equated to a total increase of 28 770 consumer units over this 10-year period.

Non-financial Census of Municipalities	2007	2017	Change 2007 - 2017	Average annual change 2007 - 2017
Domestic and non-domestic water services per consumer/billing unit	19 238	48 008	28 770	9.6%
Indigent support for water services	5 336	5 686	350	0.6%

In contrast with this, there were only an additional 350 indigents in 2017 when compared to 2007, with indigent support for water growing at a relatively slow average annual rate of 0.6 per cent. This indicates overall growth in revenue generating consumer units.

Sanitation Services

There was a 15 579 unit increase in total domestic and non-domestic consumer/billing units for sanitation services over the 2007 – 2017 period, recording average year-on-year growth of 4.0 per cent over this 10-year period.

Non-financial Census of Municipalities	2007	2017	Change 2007 - 2017	Average annual change 2007 - 2017
Domestic and non-domestic sanitation services per consumer/billing unit	32 429	48 008	15 579	4.0%
Indigent support for sanitation services	5 336	5 686	350	0.6%

Also for sanitation services, there was a contrast in overall growth versus the growth in indigent support over the 2007 – 2017 period; as overall consumer units for sanitation services grew relatively fast, there was only 350 additional indigents in 2017 when compared with 2007. This indicates overall growth in revenue generating consumer units for sanitation services.

Electricity Services

Growth in domestic and non-domestic consumer/billing units for electricity services was strong over the 2007 – 2017 period, recording average year on year growth of 7.1 per cent. This equated to a total increase of 23 796 consumer units over this 10-year period.

Non-financial Census of Municipalities	2007	2017	Change 2007 - 2017	Average annual change 2007 - 2017
Domestic and non-domestic electricity services per consumer/billing unit	24 212	48 008	23 796	7.1%
Indigent support for electricity services	5 336	5 686	350	0.6%

Also for electricity services, there was a contrast in overall growth versus the growth in indigent support over the 2007 – 2017 period; as overall consumer units for electricity services grew relatively fast, there was only 350 additional indigents in 2017 when compared with 2007. This indicates overall growth in revenue generating consumer units for sanitation services.

Refuse Removal Services

Growth in domestic and non-domestic consumer/billing units for refuse removal services was also strong over the 2007 – 2017 period, recording average year on year growth of 6.1 per cent. This equated to a total increase of 21 508 consumer units over this 10-year period.

Non-financial Census of Municipalities	2007	2017	Change 2007 - 2017	Average annual change 2007 - 2017
Domestic and non-domestic refuse removal services per consumer/billing unit	26 500	48 008	21 508	6.1%
Indigent support for refuse removal services	5 336	5 686	350	0.6%

The growth of only 350 indigents is in contrast with the fast growth in domestic and non-domestic consumer/billing units for refuse removal services, as also highlighted for water, sanitation and electricity services above.

6

SAFETY AND SECURITY

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

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

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

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

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



MURDER



Municipal Area		2016	2017	2018
Actual Number	Stellenbosch	73	56	58
	Cape Winelands District	273	345	353
Per 100 000	Stellenbosch	42	31	31
	Cape Winelands District	32	38	38

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

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

Within the Stellenbosch area, the number of murders increased marginally from 56 in 2017 to 58 in 2018, while the murder rate (per 100 000 population) remained unchanged at 31; the murder rate for the Cape Winelands District also remained unchanged at 38 in 2017 and 2018. The 2018 murder rate in Stellenbosch is the lowest in the District.

SEXUAL OFFENCES




Municipal Area		2016	2017	2018
Actual Number	Stellenbosch	204	188	201
	Cape Winelands District	997	954	970
Per 100 000	Stellenbosch	118	103	108
	Cape Winelands District	115	106	105

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

The rate of sexual violence in South Africa is amongst the highest in the world. In addition, a number of sexual offence incidences often go unreported (as in the case of rape). With respect to the crime statistic released by SAPS, sexual offences decreased by 0.6 per cent (7 115 to 7 075) in the Western Cape between 2017 and 2018. In 2018, there were 201 sexual offences in the Stellenbosch area; when comparing to the broader District, at 108, Stellenbosch's rate per 100 000 population was slightly above that of the District's 105.

DRUG-RELATED OFFENCES




		Municipal Area		
		2016	2017	2018
Actual Number	Stellenbosch	2 034	2 272	2 724
	Cape Winelands District	11 743	13 882	16 008
Per 100 000	Stellenbosch	1 174	1 249	1 459
	Cape Winelands District	1 356	1 538	1 727

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

The 2017/18 crime Statistics released by SAPS and Stats SA indicate that the Western Cape Province has the highest rate of drug related crime in the country at 1 769 per 100 000 population. It also contributed more than a third (36.2 per cent) of cases to the country's drug related crime in 2017/18. Drug-related crime within the Stellenbosch area shows an increase in 2018, from 2 272 cases in 2017 to 2 724 cases in 2018. The Cape Winelands District's trend is also on an increasing trajectory between 2016 to 2018. When considering the rate per 100 000 population, with 1 459 crimes per 100 000 population in 2018, the Stellenbosch area is below that of the District and Province's rates of 1 727 and 1 769 respectively. The Cape Winelands had the lowest district rate in the Province; Stellenbosch had the second lowest (after Drakenstein's 1 328 per 100 000 population) rate within the District.

DRIVING UNDER THE INFLUENCE




		Municipal Area		
		2016	2017	2018
Actual Number	Stellenbosch	99	131	189
	Cape Winelands District	838	814	875
Per 100 000	Stellenbosch	57	72	101
	Cape Winelands District	97	90	94

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

Despite concerted efforts by government our roads are still considered amongst the most dangerous in the world. Reckless driving and alcohol consumption remain of the top reasons for road accidents. The number of cases of driving under the influence of alcohol or drugs in the Stellenbosch area shows an increase of 58, from 131 in 2017 to 189 in 2018. This translates into a rate of 101 per 100 000 population in 2018, which is above that of the District's 94 per 100 000 population in 2018.

RESIDENTIAL BURGLARIES



Municipal Area		2016	2017	2018
Actual Number	Stellenbosch	1 499	1 579	1 525
	Cape Winelands District	6 274	6 278	5 820
Per 100 000	Stellenbosch	865	868	817
	Cape Winelands District	724	696	628

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

The 2017/18 crime statistics released by SAPS indicate that the number of residential burglaries in the Western Cape decreased by 7.3 per cent between 2017 and 2018. There was also a drop in residential burglaries in the broader Cape Winelands District. However, residential burglary cases within the Stellenbosch area decreased from 1 579 in 2017 to 1 525 in 2018. The rate (per 100 000 population) is considerably above that of the District 628 per 100 000 population.

FATAL CRASHES



Area	2015	2016	2017
Stellenbosch	37	42	32
Cape Winelands District	201	238	217

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

Fatal crashes involving motor vehicles, motorcycles, cyclists and pedestrians within the jurisdiction of the Stellenbosch Municipality has increased from 37 to 42 between 2015 and 2016, but declined again sharply in 2017 to 32. The number of fatal crashes in the broader Cape Winelands District increased by 37 between 2015 and 2016 before decreasing again by 21 in 2017.

ROAD USER FATALITIES

Area	2015	2016	2017
Stellenbosch	40	47	34
Cape Winelands District	232	307	243

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

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

The previous section specified that a total of 32 fatal crashes occurred within the Stellenbosch region in 2017. As seen in the table above, a total of 34 road users have died. Both the fatal crashes as well as number of fatalities in the Stellenbosch municipal area declined considerably in 2017.

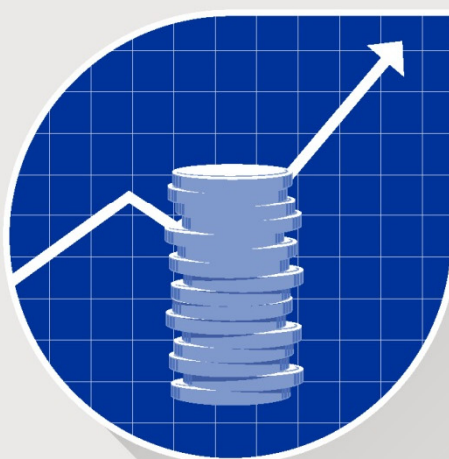
Additional, lower-level information regarding the time, location, gender, ages of above specified crashes are available from the Department of Transport and Public Works upon request.

7

THE ECONOMY

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

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



ECONOMIC SECTOR PERFORMANCE

The local economy of the Stellenbosch municipal area is dominated by the finance, insurance, real estate and business services sector (R3 144.2 million or 21.6 per cent) followed by the wholesale and retail trade, catering and accommodation sector (R2 913.0 million or 20.0 per cent), manufacturing (R2 496.1 million or 17.1 per cent), transport, storage and communication (R1 564.3 million or 10.7 per cent) and general government (R1 562.0 million or 10.7 per cent). Combined, these top five sectors contributed R11.7 billion (or 80.2 per cent) to the Stellenbosch municipal economy, which was estimated to be worth R14.6 billion in 2016.

Stellenbosch GDP performance per sector, 2006 - 2017									
Sector	Contribution to GDPR (%) 2016	R million value 2016	Trend		Real GDP growth (%)				
			2006 - 2016	2013 - 2017	2013	2014	2015	2016	2017e
Primary Sector	6.2	908.5	1.1	0.0	1.6	6.7	-3.8	-9.4	4.9
Agriculture, forestry and fishing	6.0	880.4	1.1	-0.1	1.5	6.7	-3.9	-9.7	4.8
Mining and quarrying	0.2	28.1	1.2	3.9	3.4	7.1	0.2	0.6	8.0
Secondary Sector	24.0	3 491.8	0.0	-0.2	0.0	0.2	0.1	-0.3	-1.1
Manufacturing	17.1	2 496.1	-1.0	-1.0	-1.4	-0.9	-0.6	-0.7	-1.5
Electricity, gas and water	1.4	208.3	0.4	-0.7	0.7	0.1	-1.6	-2.5	-0.1
Construction	5.4	787.5	5.4	3.4	6.6	4.8	3.7	1.6	0.5
Tertiary Sector	69.8	10 160.9	3.6	2.6	3.6%	3.1	2.5	2.3	1.4
Wholesale and retail trade, catering and accommodation	20.0	2 913.9	3.9	2.7	3.7	3.1	3.3	3.2	0.3
Transport, storage and communication	10.7	1 564.3	5.4	4.1	5.2	5.7	3.0	2.9	3.8
Finance, insurance, real estate and business services	21.6	3 144.2	3.6	2.8	3.1	2.9	3.3	2.5	2.1
General government	10.7	1 562.0	2.6	1.2	3.4	2.5	0.3	0.4	-0.6
Community, social and personal services	6.7	976.5	1.7	1.2	3.5	1.0	0.4	0.7	0.7
Total Stellenbosch	100	14 561.2	2.5	1.7	2.6	2.7	1.5	0.9	1.0

Source: Quantec Research, 2017 (e denotes estimate)

The 10-year trend, between 2006 and 2016, shows that the transport, storage and communication as well as the construction sectors registered the highest average growth rate (both 5.4 per cent) in Stellenbosch during this period, followed by wholesale and retail trade, catering and accommodation (3.9 per cent) and finance, insurance, real estate and business services (3.6 per cent). It is encouraging that 3 of the top 5 economic sectors (finance, insurance, real estate and business services; wholesale and retail trade, catering and accommodation; and transport, storage and communication) registered growth in excess of 3 per cent over this period. The manufacturing sector is the only sector that contracted from 2006 to 2016 whilst the agricultural, forestry and fishing sector recorded modest growth during this period. The agricultural, forestry and fishing sector contracted in 2015 and 2016 due to the severe drought but the estimated growth rate for 2017 is a healthy 4.9 per cent.

LABOUR

This section highlights key trends in the labour market within the Stellenbosch municipal area, starting with a breakdown of skills of the labour force, followed by employment numbers per sector as well as the unemployment levels. The majority of workers in the Stellenbosch labour force in 2016 was dominated by semi-skilled workers (42.7 per cent), whilst 33.5 per cent were low-skilled and 23.8 per cent were skilled.

Stellenbosch trends in labour force skills, 2006 - 2017					
Formal employment by skill	Skill level contribution (%)	Average growth (%)	Average growth (%)	Number of jobs 2016	
	2016	2006 - 2016	2013 - 2017e	2016	2017e
Skilled	23.8	2.3	1.9	13 030	13 068
Semi-skilled	42.7	2.0	2.4	23 392	23 593
Low skilled	33.5	-1.0	1.5	18 307	18 128
Total Stellenbosch	100	1.0	2.0%	54 729	54 789

Source: Quantec Research, 2018 (e denotes estimate)

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

The wholesale and retail trade, catering and accommodation sector contributed the most jobs in the Stellenbosch municipal area in 2016 (18 284 or 24.4 per cent), followed by finance, insurance, real estate and business services sector (12 539 or 16.7 per cent), agriculture, forestry and fishing sector (11 044 or 14.7 per cent), community, social and personal services (10 464 or 14 per cent) and manufacturing (7 745 or 10.3 per cent). Combined, these top five sectors contributed 60 076 or 80.2 per cent of the 74 877 jobs in 2016.

Stellenbosch employment growth per sector 2006 – 2017e									
Sector	Contribution to employment (%) 2016	Number of jobs 2016	Trend		Employment (net change)				
			2006 - 2016	2013 – 2017e	2013	2014	2015	2016	2017e
Primary Sector	14.8	11 076	-5 933	1 333	557	-601	2 212	-526	-309
Agriculture, forestry and fishing	14.7	11 044	-5 934	1 328	557	-603	2 210	-525	-311
Mining and quarrying	0.0	32	1	5	0	2	2	-1	2
Secondary Sector	15.7	11 729	267	859	316	159	156	110	118
Manufacturing	10.3	7 745	-568	217	192	-42	88	-104	83
Electricity, gas and water	0.2	155	50	24	3	5	5	6	5
Construction	5.1	3 829	785	618	121	196	63	208	30
Tertiary Sector	69.5	52 072	13 467	7 059	1 631	1 443	1 799	245	1 941
Wholesale and retail trade, catering and accommodation	24.4	18 284	4 890	3 200	496	394	913	227	1 170
Transport, storage and communication	4.1	3 087	1 378	596	220	107	247	-160	182
Finance, insurance, real estate and business services	16.7	12 539	3 721	1 911	446	374	547	215	329
General government	10.3	7 698	1 639	-9	-79	367	-155	120	-262
Community, social and personal services	14.0	10 464	1 839	1 361	548	201	247	-157	522
Total Stellenbosch	100	74 877	7 801	9 251	2 504	1 001	4 167	-171	1 750

Source: Quantec Research, 2018 (e denotes estimate)

The agriculture, forestry and fishing and manufacturing sectors in the Stellenbosch municipal area reported net job losses (-5 933 and -568 respectively) between 2006 and 2016. There were some job losses reported in the agriculture, forestry and fishing sector in 2016 and 2017 due to the severe drought. This is a cause for concern considering the considerable contribution of this sector to the Stellenbosch economy as well as its great significance to employment. The sectors which reported the largest increases in jobs between 2006 and 2016 was the wholesale, retail and trade (4 890), financial, real estate and business services (3 721) and community, social and personal services (1 839).

Unemployment Rates for the Western Cape (%)											
Area	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017e
Stellenbosch	6.5	6.9	8.0	9.2	9.4	9.5	9.3	9.8	9.3	10.4	11.0
Cape Winelands District	6.5	7.2	8.3	9.6	9.8	9.7	9.4	9.9	9.1	10.1	10.7
Western Cape	13.3	12.9	14.2	15.5	15.7	15.8	15.7	16.1	16.2	17.4	18.2

Source: Quantec Research, 2018 (e denotes estimate)

Over the last decade, Stellenbosch municipal area's unemployment rate has been rising steadily; it has increased from 9.3 per cent in 2015 to 10.4 per cent in 2016 and an estimated 11.0 per cent in 2017. Stellenbosch's unemployment rate in 2017 is just slightly higher than that of the District's 10.7 per cent but below that of the Province's 18.2 per cent.

SOURCES

1. Demographics

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

2. Education

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

3. Health

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

4. Poverty

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

SOURCES

5. Basic Services

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

6. Safety and Security

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

7. Economy

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