



**Monitoring and Evaluation Report on  
the Impact and Outcomes of the  
Education System on South Africa's  
Population:  
evidence from household surveys**

Published by the  
Department of Education  
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Pretoria, South Africa

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## **ACKNOWLEDGEMENTS**

Special acknowledgements are extended to the following people and organisations for their contribution to the development and validation of this report:

- i. The Royal Netherlands Embassy, which provided funding support for this document, as well as the Education Foundation Trust and
- ii. the Development Policy Research Unit at the University of Cape Town, which assisted in the technical development of the document.

## **TECHNICAL NOTES**

- i. The data and information in this report have been analysed in relation to national and global development goals and adapted from the EFA indicators for use in the South African context. In many cases, sub-national data are shown, as this publication is meant to be for both national and international consumption.
- ii. Most of the analysis on the education and population data in this publication has been specially carried out using data and information from the education system and data provided by Statistics South Africa, the national statistical agency.

## Preface to the Monitoring and Evaluation Report

The impact of the education and training system on the lives of the general population is an important barometer of the contribution to development, and human resource development in particular, that the South African education and training system has achieved.

The report attempts to bring together data and analytical information on this broader societal and systemic impact of education on the population and on society. This document analyses trends in the general population as measured and assessed through national representative household surveys. The information in this report reflects progress made in relation to local, national and international development goals and national constitutional mandates for quality education provision in South Africa. The information is meant to provide answers to the following questions:

1. What impact has there been in recent years on education levels and outcomes in the general population, and in specific groupings in society?
2. Where are the key gaps and areas that need strengthening in terms of the impact of education in broader society?
3. What specific areas require better designed, planned and targeted education interventions for young people and adults in our country?

The report attempts to summarise, in a concise and easy-to-read fashion, trends in different aspects and indicators of education service provision since 1994. Thus, it points the way for planning the impact of future interventions in the education sector, and reflects the changes that have occurred in society and the general population as a result of education interventions. This report complements the *Assessment of ten years of education and training in South Africa* document as well as statistical information contained in the Department of Education's Education Management Information System, which holds information on mainly public education institutions in the country.

The report overcomes the concerns about limited information on private and public education provision, as it presents educationally relevant results of large nationally representative surveys carried out by the national statistical agency, Statistics South Africa.

As a monitoring and evaluation tool, it will provide all those who are interested in the education enterprise with a means of assessing progress, sharpening future interventions and a tool to review performance and quality education outcomes.

The report deals first with living conditions, then with demographic indicators of education, followed by the interaction between education and labour market outcomes. The Conclusion deals with key policy recommendations and areas for intervention in the education and training system arising from the findings of the data and information. This last section is of most importance in the provision of quality education outcomes for all in South Africa.

The indicators in this report were specially extracted for maximum utility in assessing the impact and outcomes of education at a systemic and societal level, and will need to be monitored at frequent intervals so as to track performance and better ensure quality education outcomes in South Africa. Overall, these indicators are derived from information in Statistics South Africa collections, and should be supplemented and complemented by data and information in Education Management Information System databases and other social research surveys carried out by research agencies in the country to provide as holistic a picture of the system as possible.

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## 1. INTRODUCTION

Education remains one of the key avenues through which the State is involved in the economy. In preparing individuals for future engagement in the labour market, policy choices and decisions in the sphere of education play a critical role in determining the extent to which future economic and poverty-reduction plans can be realised.

The amalgamation of the numerous Departments of Education established along both racial and geographical lines, including those of the former homelands, in 1994, forming the national Department of Education (DoE), has created the space for coordinated and non-discriminatory policy formulation. However, at the same time, the DoE has faced daunting challenges in harmonising standards and conditions at schools across the country while, at the same time, having to cope with the increasing demand for education as the population grows.

This report has two main aims. Firstly, it represents an attempt to systematically uncover the changes that have occurred within and around the education system as revealed by national household survey data during the post-apartheid period. This has not been an easy task given that much of this period in time has also been a period of learning in the arena of South African national household surveys. Thus, over time, education-related questions in the household surveys have changed or fallen away or been added and this has consequently led to problems of incomparability or incomplete data series. Nevertheless, for most indicators, it has been possible to find sufficient data to enable comparisons over time. Given the immense number of indicators investigated and given the number of nationally representative household surveys, this report focuses on four years, namely 1995, 1999, 2001 and 2003. The main data sources for this report are the October Household Surveys of 1995 and 1999, the September issues of the Labour Force Surveys of 2001 and 2003, the General Household Survey of 2003, and the 10% Samples of the national population Censuses of 1996 and 2001. The second aim is of a more methodological nature, providing an overview of the ability of existing national surveys to elicit useful education-related data and suggesting improvements or additions to the questionnaires that hope to improve researchers' and policymakers' grasp of the relevant issues.

The following section provides a brief overview of the datasets used to derive the various indicators and also highlights some important issues that should be kept in mind when reading the rest of the report. The indicators investigated were broadly divided into three main groups, reflected in the following three sections of the report. Section 3 details the South African population as well as indicators of living conditions and standards. This is important information for policymakers in terms of providing a context in which education policies are required to operate and successfully deliver the desired outcomes. Section 4 presents broad education indicators, including details on attendance and completion rates, amongst others, as well as indicators of the interactions between education and demographic and household variables, such as parental characteristics. The educational characteristics of labour force participants, characteristics of the unemployed as well as details of training are presented in section 5. Finally, in section 6, the current set of nationally representative household surveys is investigated and suggestions are made for improvements in the collection of education- and educator-related information.

It is hoped that this report will provide a comprehensive look at recent changes within the education system as revealed by national household surveys and that, from it, useful indicators can be identified and used to track important changes relevant to education provision and of importance for the future attainment of longer-term socio-economic objectives.

## 2. DATA

Statistics South Africa has conducted and released a number of nationally representative household surveys since 1994. Three groups of these are of interest in the context of the present study, namely the October Household Surveys (1994-1999), the Labour Force Surveys (2000- ) and the General Household Surveys (2002- ). In order to keep the analysis relatively simple and uncluttered, four years were chosen for which indicators were calculated. The first year, 1995, relies on data from the 1995 October Household Survey (OHS) and was chosen for its proximity to 1994 to provide baseline data. Data for 1999 come from the 1999 OHS, which, while it may perhaps have been further apart from 1995 than desired, is in many instances very similar, if not identical, to the later Labour Force Surveys. The 2001 Census 10% Sample and the September 2001 Labour Force Survey (LFS) provide data for 2001, while data for 2003 come from the September 2003 LFS and 2003 General Household Survey (GHS), conducted in July of that year. In some instances, where comparisons with Census 2001 data were required, the 10% Sample of the 1996 Census was used. Some broad information about these datasets is presented in the table below.

**Table 1: Description of Datasets Used**

<i>Dataset</i>	<i>Households</i>		<i>Individuals</i>		<i>Focus</i>
	<i>Unweighted</i>	<i>Weighted ('000s)</i>	<i>Unweighted</i>	<i>Weighted ('000s)</i>	
OHS 1995	28 586	9 123	130 787	39 725	Demographic, living conditions and labour market data.
Census 1996 (10% sample)	846 478	9 059	3 621 201	40 579	Demographic and living conditions data, some labour market data.
OHS 1999	26 199	10 803	106 666	43 345	Demographic, living conditions and labour market data.
LFS 2001:2	27 355	10 899	106 434	44 665	Labour market data, with modules on individuals' incomes and living conditions.
Census 2001 (10% sample)	948 592	11 784	3 725 655	44 819	Demographic and living conditions data, some labour market data.
GHS 2003	26 398	12 546	99 428	46 495	Demographic, labour market and living conditions data.
LFS 2003:2	26 835	12 678	98 767	46 686	Labour market data, with modules on migrant workers, living conditions and incomes.

*Source: OHS 1995, Census 1996, OHS 1999, LFS 2001, Census 2001, GHS 2003, LFS 2003 (Statistics South Africa).*

The OHS 1995 is the largest of the nationally representative household surveys, containing information on more than 130 000 individuals in over 28 500 households. These data are weighted up to provide estimates for the national population of 39.7 million individuals in 9.1 million households. On average, though, the household surveys contain information on approximately 100 000 individuals in 27 000 households. The other nationally representative household surveys, excluding the Census, surveyed between 26 000 and 28 000 households containing between 98 000 and 107 000 individuals. The data from the 1996 and 2001 Censuses are 10% Samples and, as a result, contain data from many more individuals and households than do the nationally representative household surveys. In the 1996 dataset, data on 3.6 million individuals and over 846 000 households constitute the dataset. There are 3.7 million individual records in the 2001 dataset and almost 949 000 household records.

Generally, however, in the analysis below data for 1995, 1999, 2001 and 2003 are presented where possible. There are two issues to bear in mind when reading the analysis below. Firstly, it must be remembered that there is often considerable inertia when monitoring macro indicators in fields such as education, poverty and the labour market. Thus, even though potentially powerful and far-reaching policies may have been implemented that impact on a given indicator, it may take years before there is a significant change in that indicator. Therefore, where the values of a given indicator compared are relatively close to each other in time (e.g. 1995 vs. 1999 vs. 2001), often only relatively small changes are detected, bringing us to the second issue to be noted. The surveys used are nationally

*representative*, meaning that from a relatively small number of respondents who took part in the survey, the results are generalised to the national population. However, this means that there is a certain margin of error when the indicators are calculated and, therefore, where indicators change very little over time, it is impossible to say for certain that the values have in fact changed. This has generally been built into the analysis below. Similarly, where the number of respondents is very small, e.g. the school attendance rate of Asian 16 to 18 year olds in the Northern Cape, the accuracy of the indicator is doubtful and it is not 'safe' to make specific deductions or conclusions based on that value.

### 3. GENERAL POPULATION AND LIVING CONDITION INDICATORS

#### 3.1 POPULATION AND POPULATION CHANGE

The education system cannot be evaluated in isolation from the social and economic realities in which it is forced to operate. For the same reason, comparisons of educational indicators across provinces and across time are neither fair nor totally valid without taking the prevailing socio-economic conditions into account. National household surveys reveal a steady growth in the national population from 39.7 million in 1995 to 46.7 million in 2003, representing an increase of just under seven million people and an average annual growth rate of 2.0 per cent.

On a provincial level, Table 2 reveals a population increase in eight of the nine provinces. The only province to report a population reduction is the Northern Cape. Furthermore, the average annual percentage increases in population in the Eastern Cape and Free State are relatively modest in comparison to the other provinces and are below the national average. The Western Cape and Gauteng appear to have the largest percentage change in population during the period, with the Western Cape's population growing by 23.1 per cent between 1995 and 2003 and that of Gauteng by 32.6 per cent. However, Gauteng and KwaZulu-Natal record the largest absolute increases in the population, with Gauteng's population increasing by 2.3 million and KwaZulu-Natal's increasing by 1.6 million individuals.

**Table 2: The South African Population, 1995-2003**

	1995 ( <i>'000s</i> )	1999 ( <i>'000s</i> )	2001 ( <i>'000s</i> )	2003 ( <i>'000s</i> )	Change (1995-2003)		
					<i>'000s</i>	%	Ave Ann %
Total Population							
Western Cape	3 884	4 157	4 263	4 779	896	23.1	2.6
Eastern Cape	6 180	6 761	7 035	6 517	337	5.5	0.7
Northern Cape	824	890	880	822	-2	-0.3	0.0
Free State	2 575	2 821	2 842	2 741	167	6.5	0.8
KwaZulu-Natal	8 240	9 000	9 178	9 809	1 569	19.0	2.2
North West	3 276	3 586	3 595	3 809	533	16.3	1.9
Gauteng	7 174	7 769	8 021	9 515	2 340	32.6	3.6
Mpumalanga	2 740	2 998	3 128	3 265	525	19.2	2.2
Limpopo	4 832	5 310	5 724	5 429	597	12.4	1.5
Total	39 725	43 292	44 665	46 686	6 961	17.5	2.0
All Children Aged 7-15 Years							
Western Cape	706	746	692	801	94	13.3	1.6
Eastern Cape	1 582	1 758	1 529	1 581	-1	-0.1	0.0
Northern Cape	173	190	169	147	-26	-15.1	-2.0
Free State	536	585	495	515	-21	-3.8	-0.5
KwaZulu-Natal	1 864	2 075	1 817	2 087	224	12.0	1.4
North West	683	765	684	751	68	10.0	1.2
Gauteng	1 103	1 205	1 115	1 443	340	30.8	3.4
Mpumalanga	635	684	636	709	74	11.7	1.4
Limpopo	1 325	1 478	1 315	1 428	103	7.8	0.9
Total	8 606	9 485	8 452	9 461	856	9.9	1.2
All Children Aged 16-18 Years							
Western Cape	215	225	250	307	92	42.8	4.6
Eastern Cape	426	478	520	517	90	21.1	2.4
Northern Cape	53	55	59	53	0	0.0	0.0
Free State	156	186	182	179	23	15.0	1.8
KwaZulu-Natal	542	613	645	779	237	43.8	4.6
North West	211	230	223	269	57	27.1	3.0
Gauteng	345	378	365	491	146	42.2	4.5
Mpumalanga	174	197	209	256	82	46.9	4.9
Limpopo	355	376	441	474	119	33.6	3.7
Total	2 478	2 738	2 894	3 325	847	34.2	3.7

Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

Child populations of the provinces have grown at different rates to those of their adult populations. Nationally, the number of children between seven and 15 years of age increased from 8.6 million to

9.5 million between 1995 and 2003. KwaZulu-Natal and the Eastern Cape were the two provinces home to the largest numbers of children in this age group, namely 2.1 million and 1.6 million respectively. However, the largest absolute increase in children in this age-group occurred in Gauteng, which had 340 000 more children in this age-group in 2003 than it had in 1995, representing an increase of nearly 31 per cent over the period. While the population of these children grew by an average 3.4 per cent per annum in Gauteng, the growth rates in the Western Cape (1.6 per cent), KwaZulu-Natal (1.4 per cent), Mpumalanga (1.4 per cent) and the North West (1.2 per cent) were all higher than the national average growth rate. In contrast, the size of this age-group was unchanged in the Eastern Cape and declined slightly in the Northern Cape and Free State, possibly due to the effects of out-migration from these provinces within this age-group.

A slightly different pattern emerges amongst those individuals between the ages of 16 and 18 years. As with seven to 15 year olds, the largest numbers of 16 to 18 year olds resided in KwaZulu-Natal (779 000) and the Eastern Cape (517 000). However, the largest increase in the size of this population occurred in the former province, which saw the number of 16 to 18 year olds increase by 237 000 between 1995 and 2003, equivalent to 43.8 per cent over the period, or an average rate of 4.6 per cent per annum. This was followed by Gauteng with an increase of 146 000 individuals (4.5 per cent per annum on average). The most rapid increase, however, occurred in Mpumalanga, where the number of 16 to 18 year olds grew by an average of 4.9 per cent per annum to 256 000 in 2003. The Western Cape also saw a rapid increase in the size of this population (4.6 per cent per annum). The number of 16 to 18 year olds remained relatively stable over the period, while below-average growth rates were experienced in the North West (3.0 per cent per annum), the Eastern Cape (2.4 per cent) and Free State (1.8 per cent).

The relatively high growth rate of the Western Cape and Gauteng can be explained by migration into these provinces. Table 3 and Table 4 illustrate population movements between 1991 and 1996, and between 1996 and 2001, respectively. The values along the diagonal reflect within-province migration, which actually accounts for the bulk of the internal migration in South Africa. The Western Cape, KwaZulu-Natal, and Gauteng had the largest influx of migrants during the 1991-1996 period, whilst the Northern Cape attracted relatively few migrants. The Western Cape was mainly fed with migrants from Gauteng and the neighbouring Eastern Cape. KwaZulu-Natal also attracted large numbers of migrants from the Eastern Cape and Gauteng, with a rather large number of migrants coming from unspecified locations. Gauteng, which happened to be one of the largest contributors of migrants to the other provinces, received most of its migrants from the nearby provinces of Limpopo and the North West.

**Table 3: South African Population Movements between 1991 and 1996 (Thousands)**

		<i>Destination Province</i>									
		WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
<i>Region/Province of Origin</i>	WC	1161	12	6	4	5	2	16	3	1	1209
	EC	124	873	2	20	40	13	67	6	1	1146
	NC	17	2	204	6	1	6	7	1	0	245
	FS	7	5	6	750	4	18	38	7	1	835
	KZ	12	8	1	9	1175	4	89	13	1	1311
	NW	3	1	10	10	2	583	119	5	5	738
	GA	40	14	4	30	28	50	2124	51	21	2362
	MP	2	1	1	4	6	6	66	502	11	598
	LP	2	0	0	2	2	20	131	34	404	595
	Outside SA	15	2	1	28	8	21	78	18	9	181
	Unspecified	62	65	20	43	300	67	268	46	55	925
	Total	1445	984	256	907	1571	790	3003	685	507	10147
In-migrants as share of 1996 populations (%)		7.2	1.8	6.1	6.0	4.7	6.2	12.0	6.6	2.1	-

Source: Census 1996 (Statistics South Africa).

Upon closer examination of the region of origin, it is evident that for the period 1991 to 1996, the majority of the Western Cape migrants were destined for either the Eastern Cape or Gauteng, whilst those migrants from the Eastern Cape were bound for the Western Cape, KwaZulu-Natal and Gauteng. In addition, most of the migrants from the Northern Cape were headed for the Western Cape. The migrants from the Free State flocked to the North West and Gauteng, and those from KwaZulu-Natal, the North West, Mpumalanga, and Limpopo headed mainly for Gauteng. Migrants from Gauteng were mainly bound for neighbouring Mpumalanga and the North West, whilst a fair few migrants headed down to the Western Cape. With regard to immigrants, most appeared to settle in

Gauteng, although large numbers of immigrants settled in the Free State and North West provinces, ostensibly due to the location of mines in those provinces.

Between the two time periods, there appears to have been an overall reduction in the number of people migrating, with a total migration in the first period of 10.1 million being reduced to 5.6 million in the second period. For all provinces, migration within the provincial boundary fell significantly, whilst inter-provincial migration continued to grow.

**Table 4: South African Population Movements between 1996 and 2001 (Thousands)**

		<i>Destination Province</i>									
		WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
<i>Region/Province of Origin</i>	WC	507	28	9	6	9	4	32	3	2	600
	EC	143	408	4	18	63	21	87	11	6	760
	NC	21	3	72	7	2	7	11	1	2	127
	FS	14	9	6	265	8	20	59	7	4	391
	KZ	24	18	2	10	608	8	129	19	7	826
	NW	7	4	18	10	4	251	109	7	12	422
	GA	60	30	7	27	44	52	1 014	35	40	1 309
	MP	6	3	1	6	12	11	89	184	20	331
	LP	6	2	1	4	5	22	170	38	266	514
	Outside SA	21	6	2	12	14	14	77	14	12	171
	Unspecified	19	17	1	10	22	6	45	7	5	132
Total		827	527	124	374	792	415	1 821	327	376	5 582
In-migrants as share of 2001 populations (%)		7.1	1.9	6.3	4.0	1.9	4.5	9.1	4.6	2.1	-

Source: Census 2001 (Statistics South Africa).

For the 1996 to 2001 period, it is clear that Gauteng was still the dominant absorber of migrants in the country. However, in this five-year period there appeared to be greater population movements into the Western Cape than there were into KwaZulu-Natal. All three provinces remained the destination of choice for many of the migrants. It is interesting to note that in the first period (1991-1996) only 40 000 individuals migrated from Gauteng to the Western Cape, but during the period 1996 to 2001, almost 60 000 individuals migrated from Gauteng to the Western Cape, making the Western Cape the top receiving area of Gauteng migrants during this time.

The movement of children within and between provinces can be measured via the same question in the questionnaire and is an important variable in the education context. Net in-migration of children to specific areas may necessitate the construction of more schools, while dampening the demand for schools in net out-migration areas. These consequences of child migration are important considerations for planning purposes. However, monitoring the migration of children does not necessarily reveal the full extent of changed pressures on the education system. This is due to the fact that adult migration may also impact on demand for education, even if these adults do not make use of educational facilities at all. In situations where adults migrate and then have children in the sending regions, the adults may be picked up in migration statistics while their children will not, and while the added burden on the education system posed by these children is technically due to migration, actual child migration figures will not reveal this. Fortunately, though, for as long as national censuses are run every five years, this will not pose too much of a problem as children born in the regions to which their parents recently migrated will at most be five years old and will therefore not make as much use of the public education system as older children.

Similar to the trend observed for the population as a whole, child migration fell dramatically between the 1996 and 2001 national censuses (see Table 5 and Table 6). In 1996, 3.2 million children under the age of 18 years had moved in the preceding five-year period, representing approximately 19 per cent of all children in this age-group. In 2001, in contrast, only 1.4 million children had moved in the preceding five years, equivalent to less than 7.5 per cent of all children. Children tend more often than adults to move within provinces rather than between provinces. Consequently, the proportion of in-migrants in the provincial child populations was lower than the proportion amongst adults in both 1996 and 2001. The only exception was Gauteng, in 1996. Here, 9.3 per cent of all children in the province, equivalent to just over 200 000 children, were in-migrants. Over the ten year period between 1991 and 2001, it is evident that child migration reflected closely the patterns of overall migration, with Gauteng, KwaZulu-Natal and the Western Cape being home to the largest numbers of migrant children. These three provinces were also recipients of the largest numbers of in-migrants, with Gauteng receiving 140 000 children in the inter-census period, the Western Cape gaining 68 000 children and KwaZulu-

Natal receiving 40 000 children. However, on a net-migration basis, two provinces were substantial net receiving provinces while two were substantial net sending provinces. Gauteng was a net recipient of child migration, receiving approximately 76 000 children, while the Western Cape received approximately 46 000 net of out-migration. Limpopo experienced a net loss of 20 000 children while the Eastern Cape experienced a net loss of around 46 000 children due to out-migration.

**Table 5: South African Child Migration between 1991 and 1996 (Thousands)**

		Destination Province									
		WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
Region/Province of Origin	WC	371	4	2	1	1	1	4	1	0	385
	EC	34	302	1	5	9	3	15	2	0	371
	NC	4	1	75	2	0	2	2	0	0	86
	FS	2	1	2	273	1	6	9	3	0	296
	KZ	3	3	0	3	378	1	18	5	0	411
	NW	1	0	3	3	1	212	38	2	1	261
	GA	10	5	2	9	7	16	593	19	6	667
	MP	1	0	0	1	2	2	17	188	4	216
	LP	0	0	0	1	0	6	26	11	163	209
	Outside SA	3	1	0	5	2	3	14	4	2	35
	Unspecified	21	25	7	16	99	21	71	18	19	296
	Total	450	341	93	319	501	273	807	253	197	3232
In-migrants as share of 1996 populations (%)		5.5	1.3	5.1	4.4	3.3	4.3	9.3	5.1	1.3	-

Source: Census 1996 (Statistics South Africa).

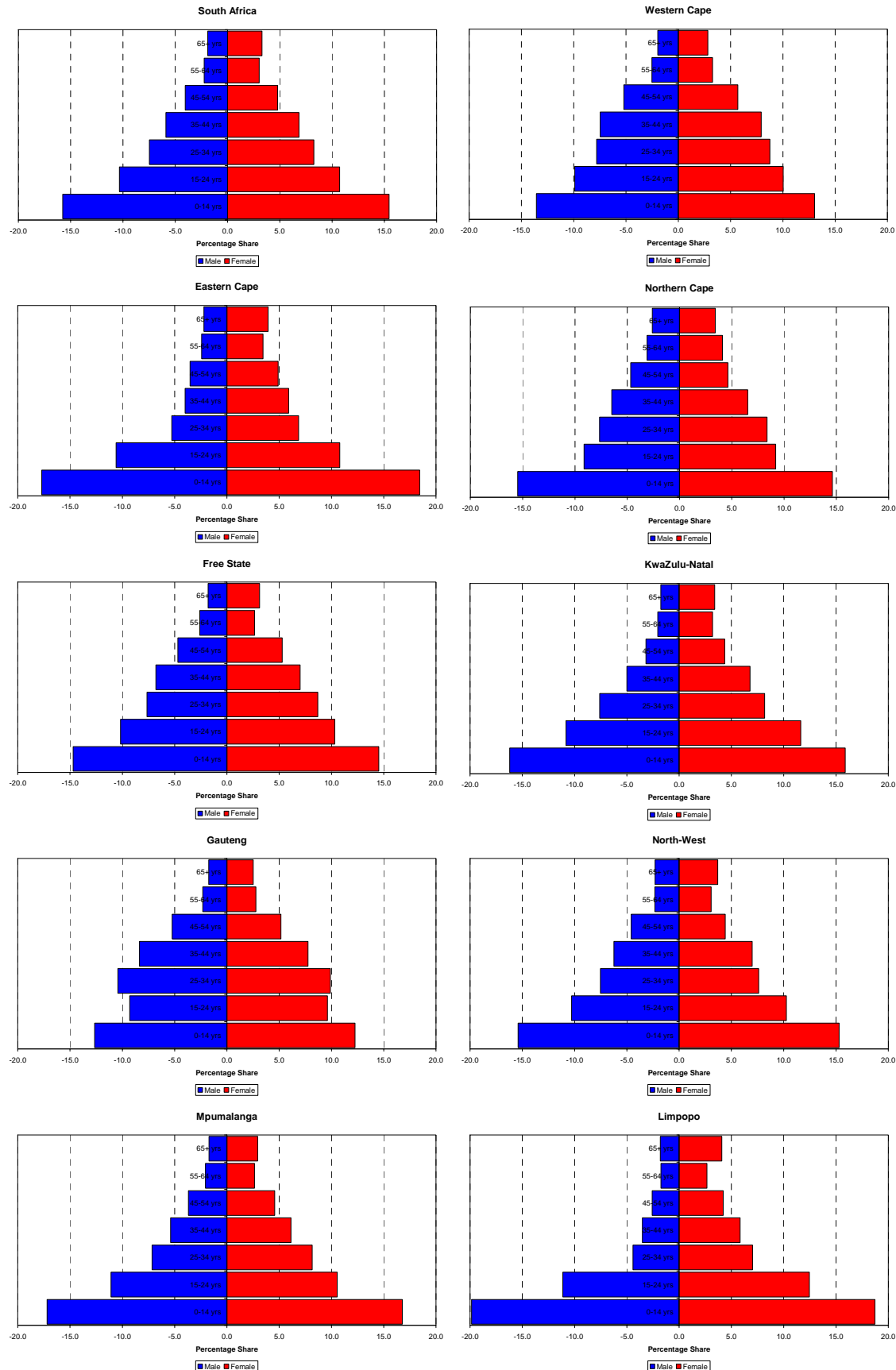
**Table 6: South African Child Migration between 1996 and 2001 (Thousands)**

		Destination Province									
		WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
Region/Province of Origin	WC	132	7	2	2	3	1	6	1	0	154
	EC	32	117	1	3	13	3	16	2	1	190
	NC	5	1	20	1	0	2	2	0	0	31
	FS	3	2	1	80	2	4	10	2	1	106
	KZ	5	4	1	3	171	2	21	5	1	213
	NW	1	1	4	2	1	70	24	2	3	108
	GA	12	7	2	6	9	12	221	8	9	286
	MP	1	1	0	2	3	3	17	58	6	91
	LP	1	1	0	1	1	5	25	11	87	133
	Outside SA	3	1	0	2	2	1	11	2	2	26
	Unspecified	4	4	0	3	6	2	7	2	1	30
Total	200	145	32	106	211	104	362	95	113	1368	
In-migrants as share of 2001 populations (%)		4.3	0.9	3.9	2.4	1.0	2.4	5.2	2.6	1.0	-

Source: Census 2001 (Statistics South Africa).

In Figure 1 below, the population pyramids for South Africa and its nine provinces for the year 2003 are presented. These pyramids are formed by stacking the proportions of the population in specific gender and age-groups. Thus, males are on the left and females on the right of the figures, with the age-groups arranged in ascending order. There are proportionately more females than males in South Africa, especially in the older age cohorts. Given the life expectancy for males and females, this is unsurprising. Most of the provinces have a similar pyramid shape to that for the country as a whole, although this is not true for the Western Cape and Gauteng, whose population pyramids are reminiscent of those of developed nations. In particular, the population pyramid for Gauteng clearly illustrates the migration of prime working-age individuals in the 25-34 year age-group into the province. Conversely, the out-migration of its working-age population is evident in the Eastern Cape's population pyramid. The province shows a large cohort of individuals in the age categories below 24 years and very small cohorts of individuals older than 24 years. The population pyramid for Limpopo also illustrates the out-migration of its working-age population, and in particular, the male working-age population.



**Figure 1: Provincial Population Pyramids, 2003**

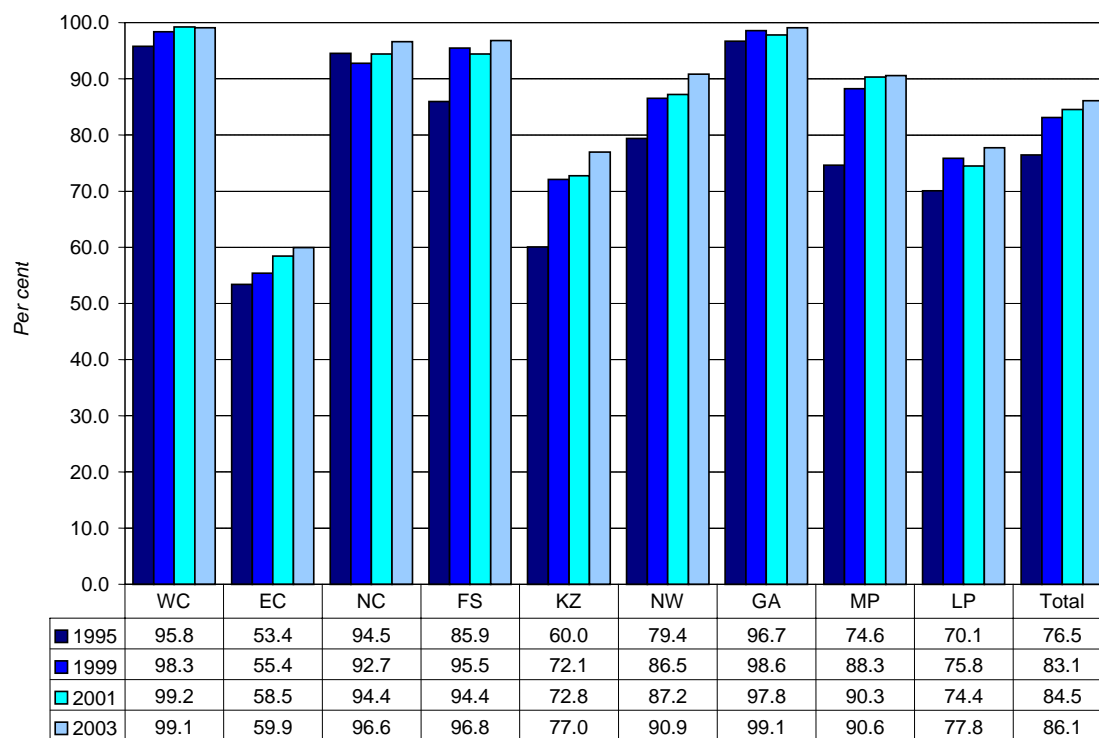
Source: LFS 2003 (Statistics South Africa).

### 3.2 LIVING CONDITIONS AND POPULATIONS UNDER STRESS

#### a. Living Conditions

The living conditions of individuals are important to education policy numbers for a number of reasons, not least of which is the ability of such variables to provide an indication of relative need, allowing targeted interventions if necessary. Furthermore, it is also useful to assess the relative achievements of disadvantaged learners, both in the presence and in the absence of policy interventions. Fortunately, national household surveys are rich sources of information on living conditions and include data on access to water, electricity and sanitation, as well as housing, amongst other things.

**Figure 2: Access to Water, by Province, 1995-2003**



Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

An important policy intervention on the national level since 1994 has been the extension of water connections to more households. In Figure 2, households' access to piped water for the years 1995, 1999, 2001 and 2003 is presented, both nationally and provincially. The impact of government policy is clearly reflected in the general trend of increasing access to piped water over the period. On a national level, access to piped water rose by almost ten percentage points from 1995 to 2003, so that 86.1 per cent of households had access to piped water in 2003. However, inter-provincial disparities in piped water access are stark. The Western Cape (99.1 per cent), Gauteng (99.1 per cent), Free State (96.8 per cent) and Northern Cape (96.6 per cent) performed particularly well with almost universal household access to piped water in 2003. The provinces of KwaZulu-Natal and Mpumalanga showed great improvement during the period, with household access to piped water increasing by 17 percentage points in the former and 16 percentage points in the latter. However, water access was still only 77.0 per cent in KwaZulu-Natal. The situation is of most concern in the Eastern Cape, though, where only 59.9 per cent of households had access to piped water in 2003, slightly up from 53.4 per cent in 1995.

There are important differences in access to piped water across race groups (

Table 7). Unfortunately, there are some instances where the sample size is too small to draw reliable conclusions for Coloured and Asian households and this is reflected in the table (the symbol "----" is

used to denote these instances). It is evident that on an aggregate level, White, Coloured, and Asian households performed significantly better than African households with regard to access to piped water and experienced marginal increases in their access rates. Amongst African households there has been a 14 percentage point increase in the proportion of households with water access, rising from 67.7 per cent in 1995 to 82.4 per cent in 2003. On a provincial level, the most deprived households in terms of water access were located in the Eastern Cape, where just over half of African households had access to piped water. The greatest improvements in access amongst African households have occurred in KwaZulu-Natal (up 24.3 percentage points to 72.3 per cent in 2003) and Mpumalanga (up 18.9 percentage points to 89.8 per cent).

Table 7: Access to Water, by Race, 1995-2003

		WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
African	1995	89.5	45.7	94.4	82.7	48.0	76.3	96.1	70.9	68.9	67.7
	1999	98.6	47.8	92.0	94.6	65.1	85.7	98.3	86.9	75.1	78.0
	2001	99.4	51.7	93.4	93.8	67.0	86.5	97.8	89.5	74.1	80.5
	2003	99.6	54.6	96.3	96.4	72.3	90.2	98.9	89.8	77.3	82.4
Col'ored	1995	95.9	90.2	92.6	95.6	91.0	85.1	99.1	---	---	94.7
	1999	97.7	90.8	91.5	97.1	96.5	---	100.0	---	---	96.1
	2001	98.9	96.4	95.7	90.3	98.1	96.4	99.4	---	---	98.2
	2003	98.7	91.4	96.8	97.5	98.5	---	100.0	---	---	97.8
Asian	1995	---	---	---	---	97.4	---	100.0	---	---	98.1
	1999	100.0	---	---	---	98.7	---	99.5	---	---	98.9
	2001	95.0	---	---	---	99.7	---	98.3	---	---	99.3
	2003	92.5	---	---	---	99.8	---	100.0	---	---	99.5
White	1995	99.0	93.0	98.6	98.6	97.5	99.2	96.9	95.4	94.3	97.3
	1999	99.2	98.5	97.5	100.0	97.7	94.2	99.2	98.5	94.4	98.6
	2001	99.8	96.6	93.1	98.7	99.1	93.5	97.6	98.9	87.7	97.9
	2003	99.7	97.2	96.6	99.0	98.6	99.1	99.5	97.1	94.0	98.9

Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

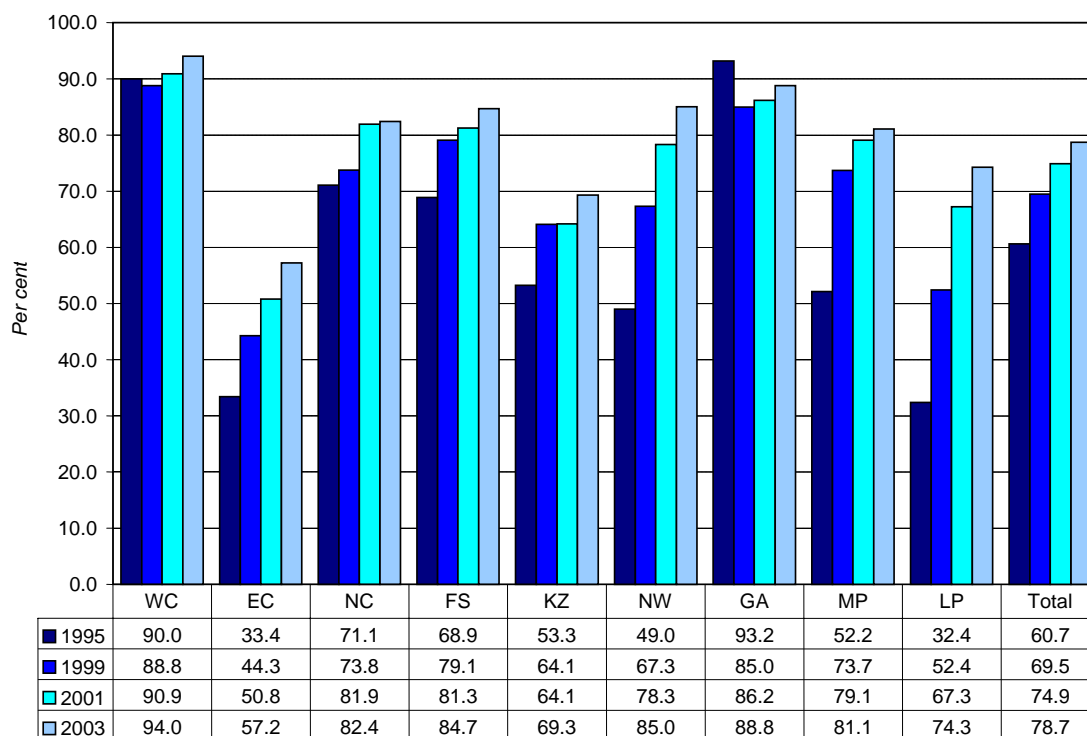
The improvements in access amongst African households across all provinces have resulted in a significant narrowing in the gap between race groups. Nationally, the difference between African and White access rates was nearly halved from 29.6 percentage points in 1995 to 16.5 percentage points in 2003. In four provinces, namely the Western Cape, the Northern Cape, the Free State and Gauteng, the gap in access rates was reduced to below three percentage points by 2003, from an unweighted average of approximately 7.5 percentage points in 1995. Good progress has also been made in KwaZulu-Natal (49.5 percentage points in 1995 vs. 26.3 percentage points in 2003), Mpumalanga (24.5 percentage points vs. 7.3 percentage points) and the North West province (22.9 percentage points vs. 8.9 percentage points). The only province that has not been able to make significant inroads into this access gap is the Eastern Cape, where the difference in access rates between African and White households has declined from 47.3 percentage points to 42.6 percentage points over the period.

The electrification of areas previously without electricity has also been a priority and, as a result, the proportion of households nationally with access to electricity has increased from 60.7 per cent to 78.7 per cent between 1995 and 2003 (Figure 3). Although the surveys do not directly ask whether an individual is connected to the electricity power grid, access to electricity can be derived from three questions that inquire about households' main sources of energy for lighting, heating and cooking respectively. Thus, households with access to electricity are those who report electricity as their main source of energy for lighting or heating or cooking. Access to electricity was highest in the Western Cape and Gauteng, with access rates in 2003 of 94.0 per cent and 88.8 per cent respectively. However, Gauteng was the only province where electricity access rates had declined since 1995. Although this may be the result of a change in the definition of households, particularly given the drop between 1995 and 1999 and consequent rise to 2003, it is clear that the large extent of in-migration to this province would have dampened the rise in access rates even though the number of connected households may have risen over time.

All other provinces have seen rather consistent improvements in household electricity access, the most remarkable improvements coming in the North West and Limpopo provinces. In Limpopo, access to electricity more than doubled from 32.4 per cent in 1995 to 74.3 per cent in 2003. Similarly, in North West, access increased by 36 percentage points to 85.0 per cent. Although the Eastern Cape still had

the lowest access rate at 57.2 per cent of households, the rate was nearly doubled from 33.4 per cent in 1995.

**Figure 3: Access to Electricity, by Province, 1995-2003**



Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

The varied racial fortunes in terms of access to electricity are presented in Table 8 below. It is apparent that, as in the case of access to piped water, Asian and White households enjoyed almost universal access to electricity. During the period, Coloured households' access to electricity increased from 84.1 per cent in 1995 to almost 92 per cent in 2003. In particular, in the Northern Cape and Eastern Cape the proportion of Coloured households with access to electricity increased by 15 and 12 percentage points respectively. Interestingly, in the Free State, the proportion of Coloured households with access to electricity actually fell over the period.

**Table 8: Access to Electricity, by Race, 1995-2003**

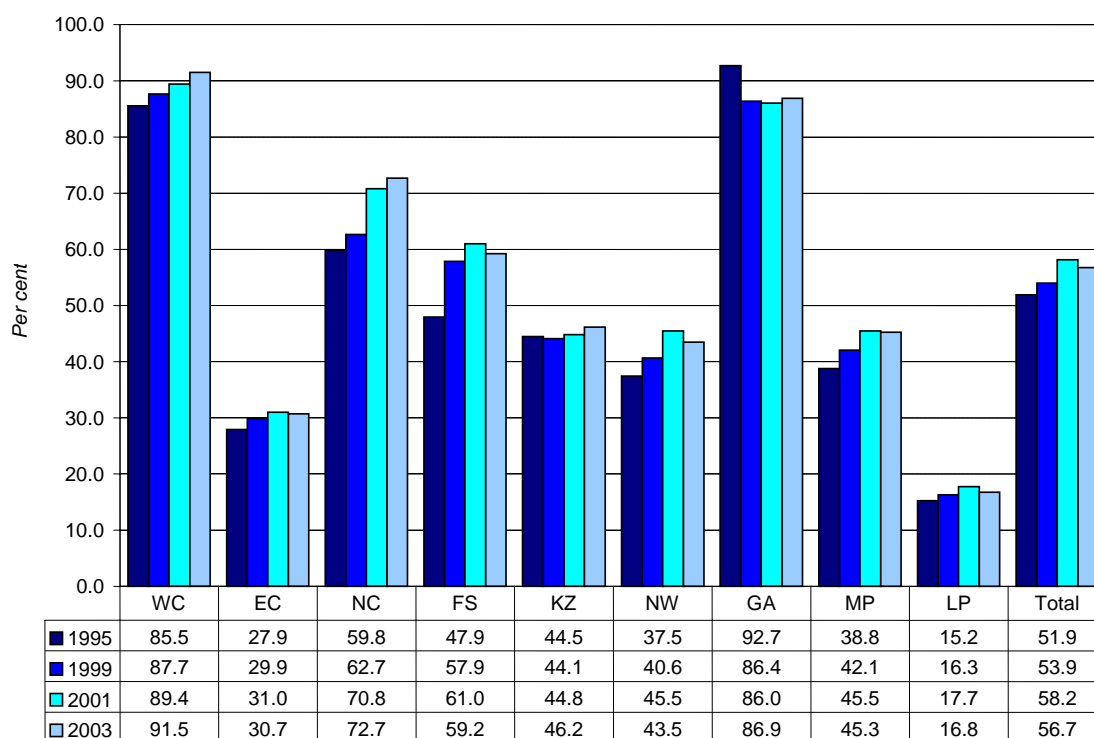
		WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
African	1995	73.2	23.0	66.0	61.3	38.6	40.7	88.0	43.7	29.1	45.6
	1999	66.1	35.9	73.2	75.4	55.1	64.5	78.8	70.4	50.8	60.6
	2001	77.9	44.4	79.4	78.4	56.9	76.5	82.7	77.3	66.5	68.8
	2003	85.8	52.1	79.9	82.4	63.2	83.9	85.2	79.2	73.6	73.5
Col'ored	1995	89.4	68.5	63.9	83.4	85.2	81.3	96.9	---	---	84.1
	1999	92.4	75.1	68.3	81.4	94.8	---	93.1	---	---	86.8
	2001	92.7	71.9	79.2	76.8	94.5	81.0	91.6	---	---	88.7
	2003	95.4	81.0	79.1	74.0	92.0	---	94.7	---	---	91.7
Asian	1995	---	---	---	---	98.6	---	100.0	---	---	99.0
	1999	100.0	---	---	---	96.8	---	99.5	---	---	97.4
	2001	100.0	---	---	---	97.4	---	98.3	---	---	97.8
	2003	92.5	---	---	---	98.0	---	100.0	---	---	98.4
White	1995	99.7	98.2	91.8	99.7	99.8	99.6	99.7	100.0	99.4	99.4
	1999	99.6	99.6	89.0	100.0	99.1	94.9	99.1	98.7	97.7	98.8
	2001	99.9	100.0	95.9	99.7	99.1	99.2	99.1	100.0	100.0	99.4
	2003	99.8	100.0	97.3	99.7	99.1	99.5	99.8	99.5	100.0	99.7

Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

Not unexpectedly, African households lagged behind other households in terms of electricity access. In 2003, while more than nine-tenths of Coloured, Asian and White households had electricity, this was true of less than three-quarters of African households. The situation was even worse in 1995, with Asian and White access rates of 99 per cent and above, Coloureds with access rates of 84.1 per cent, and only 45.6 per cent of African households having electricity. Substantial improvements in access occurred in the Eastern Cape (up 29 percentage points to 52.1 per cent), the North West (up 43 percentage points to 83.9 per cent), Limpopo (up 44 percentage points to 73.6 per cent) and Mpumalanga (up 45 percentage points to 79.2 per cent). Despite this, there remains significant room for improvement in access, particularly in the Eastern Cape and KwaZulu-Natal. One point to keep in mind, though, is that there are rising numbers of disconnections from the electricity supply, generally due to non-payment, and this may not necessarily be reflected in the data.

The final household service for which access can be investigated is sanitation, which is essential for the promotion of improved health and living conditions. Here, access to sanitation refers to households having access to flush toilets, either in their dwellings or on site, and these flush toilets can be connected either to a public sewage system or to a septic tank. Nationally, approximately 57 per cent of households had access to modern sanitation in 2003, somewhat higher than in 1995 (Figure 4). As with other household services, access rates in the Western Cape and Gauteng were highest at 91.5 per cent and 86.9 per cent respectively. As with electricity and water access, it appears that sanitation access in Gauteng has come under pressure due to the extent of in-migration to this province. Five of the nine provinces, namely the Western Cape, Northern Cape, Free State, North West and Mpumalanga, have seen improvements in their access ratios. Very little change in access to sanitation has occurred in the Eastern Cape or Limpopo, with access rates of 30.7 per cent and 16.8 per cent in 2003 respectively.

**Figure 4: Access to Sanitation, by Province, 1995-2003**



Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

The discrepancies in access to a flush toilet amongst households in the provinces are marked. In 2003, households in the Western Cape and Gauteng had the highest access rates with more than 90 per cent of households in the Western Cape and approximately 87 per cent of households in Gauteng having access to flush toilets. Again, access in Gauteng seems to have been put under pressure by in-migration to the province. During the period of analysis, household access increased most noticeably in the Northern Cape (12.9 percentage points) and the Free State (11.3 percentage points).

In three provinces, namely the Eastern Cape (2.8 percentage points), KwaZulu-Natal (1.7 percentage points), and Limpopo (1.6 percentage points), there was negligible change in access. As a result, household access to a flush toilet in Limpopo and the Eastern Cape remained poor, with less than one-third of households in the Eastern Cape and less than one in five households in Limpopo having access in 2003.

Racial disparities in sanitation access are revealed in

Table 9. African households are particularly disadvantaged (with an access rate of 45.4 per cent in 2003), while Asian and White households have close to universal access to flush toilets (97.0 per cent and 99.6 per cent respectively in 2003). Just over 88 per cent of Coloured households also have access to modern sanitation.

Table 9: Access to Sanitation, by Race, 1995-2003

		WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
African	1995	64.9	17.4	38.3	35.1	27.3	27.4	86.9	28.0	11.2	33.9
	1999	65.4	20.2	60.4	50.6	29.9	35.2	80.7	34.5	13.2	40.3
	2001	75.1	21.7	71.6	54.2	33.3	40.4	82.4	40.7	15.8	47.5
	2003	77.9	22.1	75.2	51.9	35.5	38.9	82.6	39.8	14.6	45.4
Col'ored	1995	83.2	55.2	53.4	76.6	82.9	70.8	98.6	---	---	77.2
	1999	90.4	59.1	51.0	58.1	96.6	---	95.3	---	---	81.1
	2001	91.1	63.8	58.6	76.1	98.5	78.3	95.0	---	---	85.3
	2003	94.1	72.9	60.4	70.0	91.1	---	96.5	---	---	88.2
Asian	1995	---	---	---	---	96.9	---	100.0	---	---	97.6
	1999	100.0	---	---	---	95.5	---	99.5	---	---	96.3
	2001	100.0	---	---	---	97.9	---	98.3	---	---	98.2
	2003	92.5	---	---	---	95.9	---	100.0	---	---	97.0
White	1995	99.6	99.5	99.7	99.6	99.8	100.0	99.8	100.0	98.8	99.7
	1999	99.7	99.1	98.1	100.0	99.1	94.9	99.2	98.7	96.7	99.0
	2001	100.0	100.0	99.2	99.7	99.5	99.7	99.3	100.0	100.0	99.6
	2003	100.0	99.5	100.0	100.0	98.7	100.0	99.8	99.5	97.8	99.6

Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

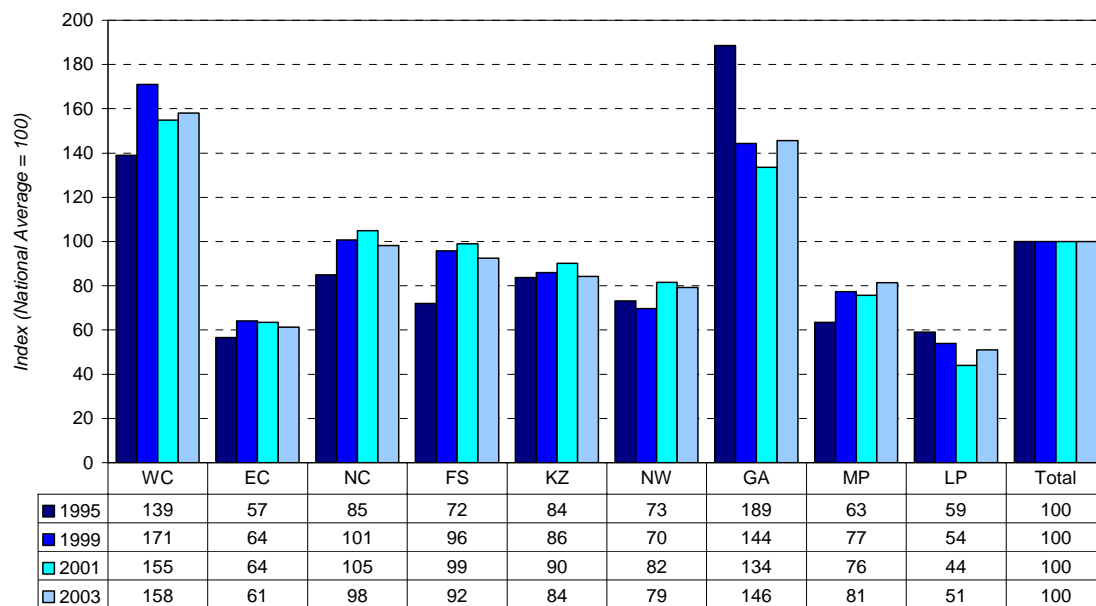
Even within race groups, there is sometimes a wide dispersion of access rates provincially. This is particularly the case for Africans and, to a lesser extent, for Coloureds. Amongst Africans, access rates ranged in 2003 from 14.6 per cent of households in Limpopo and 22.1 per cent in the Eastern Cape to 82.6 per cent in Gauteng. Five provinces had access rates amongst African households ranging between 30 and 40 per cent. These five provinces, however, are the most rural provinces, which makes provision of flush toilets not viable, so that greater reliance is placed on pit latrines. The rate of access to flush toilets amongst Africans, though, increased substantially from 33.9 per cent in 1995 to 45.4 per cent in 2003. Provincially, in 2003 African households in the Western Cape, Northern Cape and Gauteng had higher access rates than the other provinces. The greatest improvement in access to flush toilets for African households occurred in the Northern Cape, where household access increased by 36.9 percentage points from 1995 to 2003. The improvements in the Eastern Cape and Limpopo were marginal, with household access increasing by less than five percentage points during the period. Consequently, household access to a flush toilet in these two provinces remained limited for the African population. The only province in which Coloured households did not perform well with regard to access to a flush toilet was the Northern Cape, where roughly 60 per cent of households had access in the dwelling or on-site in 2003.

As a possibly more direct indicator of living standards, household per capita expenditure is used. The capturing of income and expenditure data is relatively difficult and fraught with problems. In most South African national household surveys, expenditure or income data are collected either as a point (an actual income) or in a band, but sometimes questions ask the households' incomes or expenditures in the previous month. However, deflation of these incomes is relatively difficult and the data are rather unstable over time. In order to avoid this problem,

**Figure 5** reports household per capita expenditures relative to the national average, which is indexed at 100 for each year. As the data are not always completely reliable, it is best to use the figure to gauge provinces' relative positions rather than attempting to extract precise information.<sup>1</sup>

The Western Cape and Gauteng are the two provinces with the highest average per capita household expenditure consistently over the period. In 2003, the index of household expenditure per capita in the Western Cape was 158 and 146 in Gauteng, compared to the national index of 100. For three of the four years presented in the figure, the Western Cape had higher household per capita expenditure than Gauteng. The Northern Cape and the Free State had been close to the national average since 1999, the former moving between 98 and 105 and the latter between 92 and 99. The Eastern Cape and Limpopo, according to this measure, were the two poorest provinces, with index values of 61 and 51 respectively. As has been seen above, these two provinces were also rated lowest in terms of household access to services.

**Figure 5: Household Per Capita Expenditure Relative to National Average, by Province, 1995-2003**



Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

<sup>1</sup> The actual nominal estimates of per capita household expenditure are as follows: R12 847 per year in 1995, R6 561 per year in 1999, R6 447 per year in 2001, and R7 783 per year in 2003. These are inconsistent over time, particularly when inflation is taken into account, and hence the decision was made to present the data as an index relative to the national average in each year. This eliminates the problem of comparability over time, and households' relative performance can be tracked.

**Table 10: Household Per Capita Expenditure Relative to National Average, by Race, 1995-2003**

		WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
African	1995	62	33	30	38	44	47	84	35	46	48
	1999	67	43	84	65	55	59	82	54	46	59
	2001	67	39	60	67	57	64	86	62	38	62
	2003	65	42	71	61	56	66	88	62	43	62
Col'ored	1995	64	46	44	35	107	54	116	---	---	66
	1999	100	61	56	63	125	---	97	---	---	89
	2001	92	73	70	82	142	63	139	---	---	93
	2003	103	63	59	71	177	---	125	---	---	98
Asian	1995	---	---	---	---	132	---	222	---	---	149
	1999	---	---	---	---	126	---	261	---	---	161
	2001	---	---	---	---	148	---	252	---	---	188
	2003	---	---	---	---	154	---	237	---	---	180
White	1995	291	273	238	228	290	252	341	234	335	300
	1999	386	304	260	292	348	232	312	276	284	322
	2001	384	345	313	299	395	289	342	245	301	347
	2003	388	318	285	302	351	282	371	302	364	355

Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

The apartheid legacy is still very evident from the racial breakdowns presented in Table 10. The now familiar racial stratification of income as proxied by household per capita expenditure sees Whites with the highest expenditures (an index value of 355 for 2003, which is interpreted as being more than 3.5 times the national average). Asians are a relatively distant second (180 in 2003), followed by Coloureds (98) and Africans (62). All groups, though, have seen increases in their indices relative to the national averages, which are 100 for each year. Thus, Africans have seen their relative household per capita expenditure rise from 48 to 62 between 1995 and 2003, Coloureds have risen from 66 to 98, Asians from 149 to 180, and Whites from 300 to 355. At first glance, this appears impossible, since it would seem that all groups could not rise relative to the average, that at least one group should move downwards. However, it must be kept in mind that these figures are indices and that, given the population growth experienced amongst Africans over the period, a greater proportion of the population is African in 2003 than in 1995. Consequently, even though the index for Africans has risen, it is still below 100 and the value of 62 is more heavily weighted in the calculation that renders the national average of 100 in 2003 than the value of 48 is in 1995.

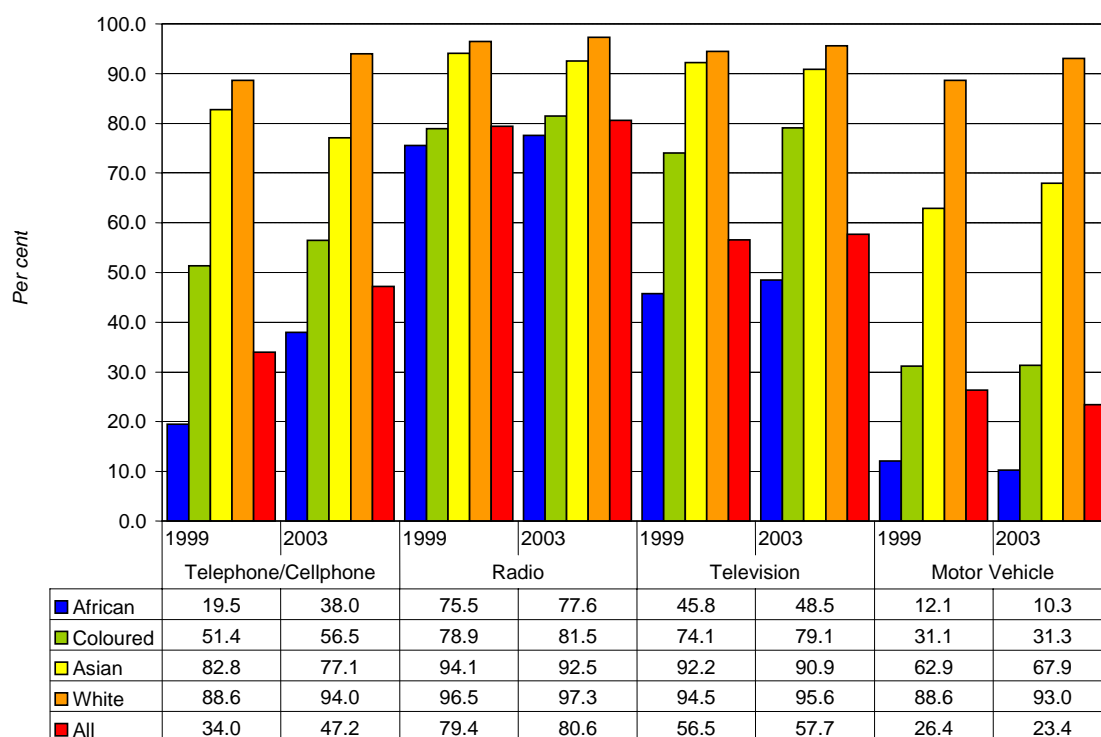
Again it appears that location plays a role, since none of the race groups perform equally well in all provinces. For example, Africans in the Eastern Cape and Limpopo had expenditure indices in the low forties in 2003, compared to 71 in the Northern Cape and 88 in Gauteng. Similarly, Coloureds in KwaZulu-Natal were significantly better off than in any other province, with an index of 177 in 2003, compared to 59 in the Northern Cape and 63 in the Eastern Cape. In most provinces, Whites had indices in excess of 300, except for the Eastern Cape (285 in 2003) and the North West (282). This group's indices were highest in the Western Cape (388) and Gauteng (371).

A final set of indicators presented reflects household ownership of four assets, namely telephones (either landline or cellular), radios, televisions and motor vehicles. In

**Figure 6**, ownership of these four assets is presented by race for 1999 and 2003. Approximately 47 per cent of households reported owning a telephone or cellphone in 2003. This represented a rapid increase in ownership rates of around 13 percentage points from 34.0 per cent in 1999. Telephone ownership rates increased across the race groups with the exception of Asians, where it declined slightly. Amongst African households, telephone ownership increased by 18.5 percentage points to 38.0 per cent in 2003, while virtually all White households reported owning a telephone (94.0 per cent in 2003).

**Figure 6: Household Ownership of Assets, by Race, 1999 & 2003**



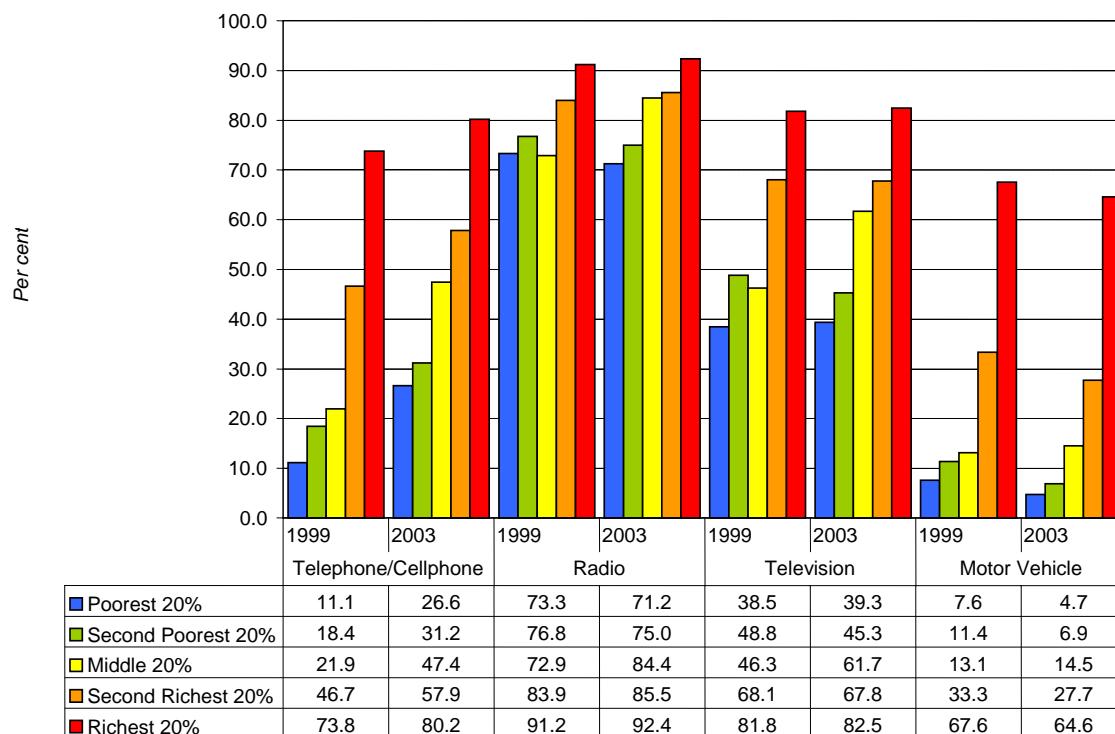


Source: OHS 1999 & LFS 2003 (Statistics South Africa).

The ownership of radios was extensive amongst all race groups, especially for Asian and White households, indicating that the radio is one of the most important and effective means of communication that government can access in order to provide the public with information. In 2003, four in every five households owned a radio. Of all the assets included here, radio ownership displays the smallest racial disparity, with the White ownership rate less than 20 percentage points higher than the African rate of ownership. In contrast, just over half of South African households owned a television in both 1999 and 2003, with barely a change in the rate of ownership over the period. Ownership of a television set was substantially higher amongst Asian and White households, with nine out of every ten households owning a TV. Again, ownership was up across the race groups, except for Asians, although the proportion of African households owning a TV rose only slightly from 45.8 per cent in 1999 to 48.5 per cent in 2003.

Less than a quarter of South African households owned a motor vehicle in working condition in 2003. The racial discrepancies in motor vehicle ownership are stark and reflect clearly the economic fortunes of the four major race groups under apartheid. In 2003, one in ten African households, less than one-third of Coloured households, two-thirds of Asian households, and 93 per cent of White households owned a motor vehicle.

In Figure 7, asset ownership is compared according to households' positions within the national per capita expenditure quintiles for 1999 and 2003. In 1999, 11.1 per cent of the poorest quintile of households owned a telephone or cellular phone, and by 2003, ownership had risen to 26.6 per cent. During the period, the proportion of households owning a telephone increased for all household expenditure quintiles. Furthermore, the ownership of a radio was fairly extensive across all quintiles, with the ownership rate differential between the top and bottom quintiles being slightly more than 20 percentage points. In 2003, 71.2 per cent of households in the poorest quintile and 92.4 per cent of those in the richest quintile owned a radio.

**Figure 7: Household Ownership of Assets by Per Capita Expenditure Quintile, 1999 & 2003**

Source: OHS 1999 & LFS 2003 (Statistics South Africa).

Unlike radios, which can be operated using batteries, televisions depend on electricity for operation and, as a result, television ownership rates are likely to be related to electricity access rates. Thus, less than two out of five households in the poorest quintile owned a television set in 2003. Significant gains were made by the middle quintile, where ownership of a television set increased by 15.4 percentage points during the period. As can be expected, more than four-fifths of households in the top quintile owned a television.

The acquisition and maintenance of a motor vehicle is a substantially expensive undertaking and, as a result, vehicle ownership rates are even more likely to correlate with the households' position within the expenditure quintiles. As such, a mere 4.7 per cent of the poorest 20 per cent of households owned a motor vehicle in 2003, down slightly from the 7.6 per cent ownership rate of 1999. Of the richest 20 per cent of households, less than two-thirds owned a motor vehicle in 2003. The only group not to record a marginal decline in household ownership of a motor vehicle was the middle 20 per cent of households. These trends have implications for the provision of safe and reliable public transport possibilities for the poorest 60% of the population. A feature of an aging, more affluent population may be decreased reliance on owned motor vehicles for transport and the use of private transport services, but this may only be confirmed with more investigation of the data and underlying population.

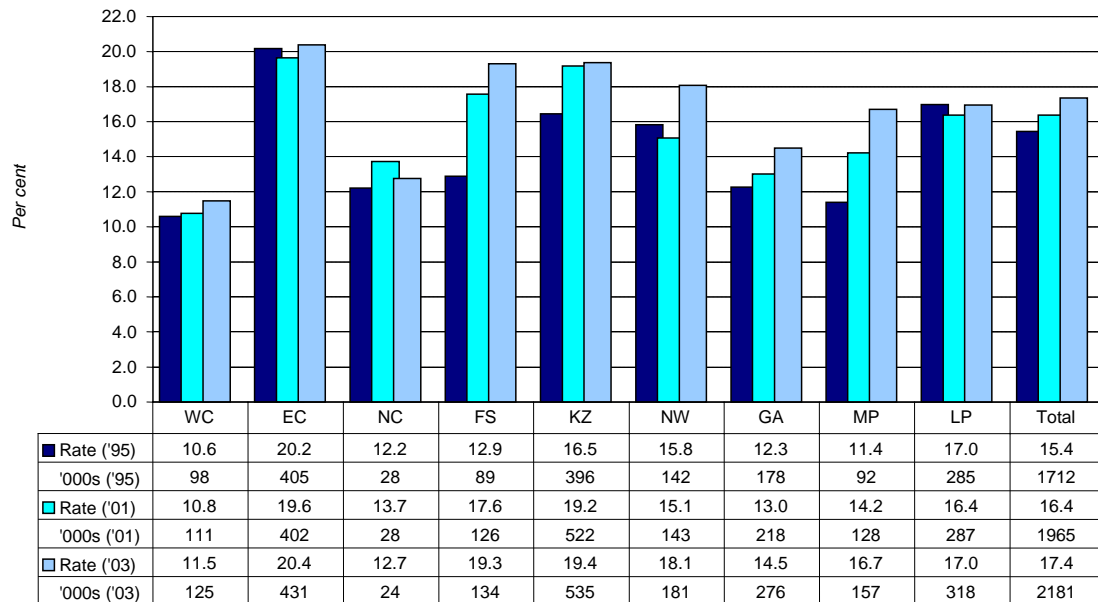
#### **b. Populations Under Stress**

The previous section investigated living conditions as proxied by access to services, such as water and electricity, and household per capita incomes. This section investigates some groups that are identified as being under stress; in other words, they are perhaps more vulnerable to shocks than other individuals. Four groups are relatively easily identified from the surveys, namely orphans (both single and double orphans), grant recipients, disabled individuals, and children in households reporting an inability (either temporary or permanent) to provide sufficient food for all members. Finally, dependency ratios are used to identify groups that are most reliant on relatively few members in the household.

Orphans are becoming an increasingly urgent reality of the post-apartheid era as a direct consequence of the HIV and AIDS pandemic that currently plagues our country as well as the emergence of communicable diseases such as cholera and malaria. The rise in the rates of orphanhood has important implications for orphaned children as well as for the State, and raises its

burden in terms of the provision of education, since orphans' caregivers are generally less likely to be able to afford school-related expenses in those cases where orphans are not cared for directly by the State. Two types of orphans are identified, namely 'single orphans' who have lost one parent, either their father or their mother, and 'double orphans' who have lost both parents. In Figure 8, the proportions of seven to 18 year olds who have lost only one parent across the nine provinces and nationally are presented, for the years 1995, 2001, and 2003.

**Figure 8: Single Orphans, by Province, 1995-2003**



Source: OHS 1995, LFS 2001, LFS 2003 (Statistics South Africa).

Between 1995 and 2003, the proportion of single orphans rose by two percentage points to 17.4 per cent. In other words, 17 out of every 100 children between the ages of seven and 18 years had lost one of their parents. The provincial variations that exist seem, at least partially, related to the severity of the HIV/Aids pandemic in the provinces. Single orphanhood rates were lowest in the Western Cape (11.5 per cent in 2003), the Northern Cape (12.7 per cent) and Gauteng (14.5 per cent). In contrast, three provinces had single orphanhood rates in excess of 19 per cent, namely the Free State (19.3 per cent), KwaZulu-Natal (19.4 per cent) and the Eastern Cape (20.4 per cent). In these provinces, around one out of every five children in this age-group had lost one parent. Generally, single orphanhood rates rose across the provinces, remaining relatively constant in the Eastern Cape and Limpopo provinces. The most rapid increases over the eight year period occurred in the Free State (6.4 percentage points) and Mpumalanga (5.3 percentage points).

As is evident from Table 11, the proportions of Asian and White children who are orphans are much lower than those for Coloured and African children. In fact, in most provinces, the numbers of Asian and White single orphans are too low to allow significant results. The only exceptions are Gauteng for Whites (around four per cent of children) and KwaZulu-Natal for Asians (around eight per cent). In 2003, around one in ten Coloured children and just under one in five African children had lost a parent. In 2003, African children were particularly hard hit in the Eastern Cape (21.1 per cent), Free State (21.0 per cent) and KwaZulu-Natal (20.9 per cent). Interestingly, 20.0 per cent of African children in the Western Cape had also lost one parent, a rate that is almost twice the provincial average. In terms of absolute numbers, in 2003 approximately 2.2 million children had lost one parent, compared to 1.7 million in 1995. Just over two million of these single orphans were African, while 115 000 were Coloured. Asians and Whites accounted for fewer than 40 000 single orphans in 2003.

**Table 11: Single Orphans, by Race and Province, 1995-2003**

			WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
African	1995	Rate	17.0	21.1	16.9	13.6	18.0	16.5	15.1	12.0	17.2	17.2
		'000s	30	381	12	81	374	137	152	89	284	1540
	2001	Rate	16.9	20.5	14.8	18.5	20.5	15.6	15.2	14.7	16.6	18.0
		'000s	44	383	11	120	498	137	189	125	285	1791
	2003	Rate	20.0	21.1	16.9	21.0	20.9	18.8	16.8	17.6	17.1	19.2
		'000s	57	410	11	128	522	177	254	157	317	2032
Coloured	1995	Rate	10.1	14.0	11.5	23.4	13.8	11.7	6.0	---	---	11.0
		'000s	58	18	15	5	4	2	4	2	0	108
	2001	Rate	9.6	13.4	14.5	14.1	13.5	14.6	11.1	---	---	11.0
		'000s	59	17	16	3	5	2	9	1	0	113
	2003	Rate	10.3	16.6	10.9	13.0	6.5	9.8	12.7	---	---	11.1
		'000s	68	18	12	3	3	1	11	0	0	115
Asian	1995	Rate	5.1	---	---	---	8.0	---	6.5	---	---	8.4
		'000s	1	1	0	2	15	0	2	0	0	21
	2001	Rate	6.0	---	---	---	8.2	---	6.1	---	---	7.5
		'000s	1	0	0	0	14	0	3	0	0	18
	2003	Rate	---	---	---	---	5.7	---	1.4	---	---	4.8
		'000s	0	0	0	0	10	0	1	0	0	11
White	1995	Rate	5.6	6.9	3.4	2.1	2.5	6.3	5.7	3.1	4.3	4.9
		'000s	9	4	1	1	3	3	19	2	1	44
	2001	Rate	5.1	5.3	4.8	6.6	5.8	6.2	5.6	5.7	4.6	5.6
		'000s	7	3	1	3	5	3	18	2	1	43
	2003	Rate	0.7	4.4	8.5	5.8	1.5	5.4	3.8	0.5	2.9	3.2
		'000s	1	2	1	4	1	2	10	0	1	22

Source: OHS 1995, LFS 2001, LFS 2003 (Statistics South Africa).

Notes: 1. Orphanhood rates cannot be calculated for certain groups as the sample size is too small. These are indicated by three dashes (---) and refer to groups with fewer than 10 000 weighted observations.

Double orphanhood rates also increased, although relatively marginally, over the period from 2.0 per cent in 1995 to 3.0 per cent in 2003 (Table 12). Thus, in 2003, approximately 371 000 children had lost both parents. Once again, double orphanhood rates, like single orphanhood rates, were highest in KwaZulu-Natal (4.1 per cent), the Free State (3.7 per cent) and the Eastern Cape (3.5 per cent). Racial breakdowns of double orphanhood rates are not possible due to the very small number of Coloured, Asian and White children who have lost both parents.

**Table 12: Double orphans, by Province, 1995-2003**

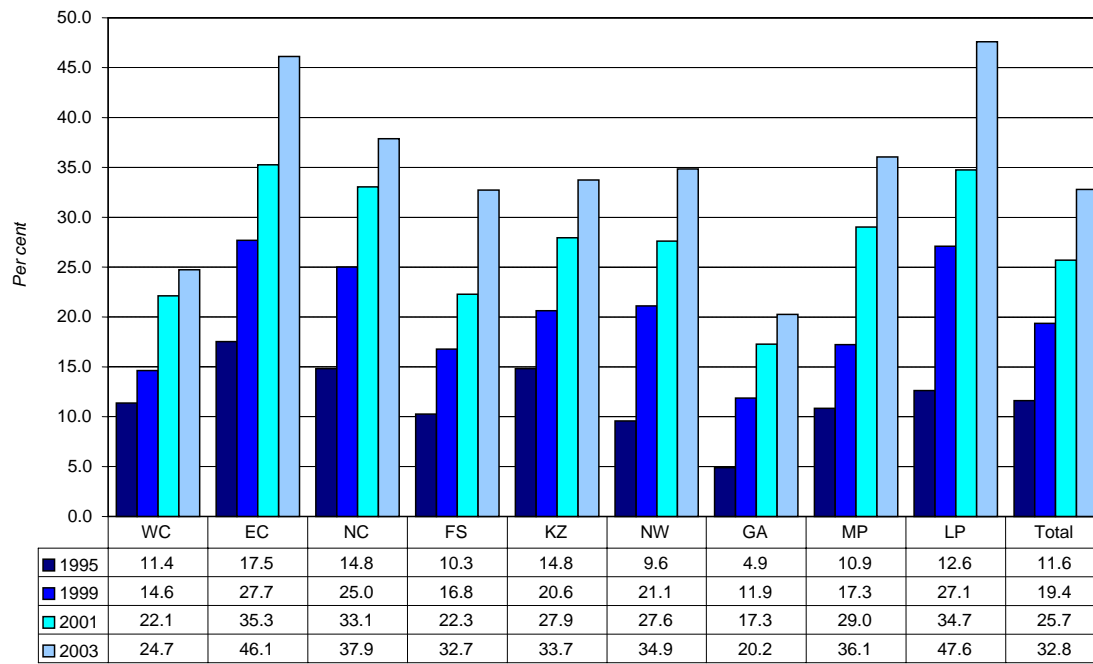
			WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
1995	Rate		1.7	3.2	3.1	1.9	2.1	1.7	1.8	0.9	1.3	2.0
	'000s		15	64	7	13	52	15	25	7	21	220
2001	Rate		0.9	2.1	1.8	2.7	2.6	2.0	1.5	1.6	1.4	1.9
	'000s		10	43	4	19	72	19	26	14	25	232
2003	Rate		1.7	3.5	3.4	3.7	4.1	3.3	1.8	3.0	2.0	3.0
	'000s		19	74	6	26	114	33	34	28	38	371

Source: OHS 1995, LFS 2001, LFS 2003 (Statistics South Africa).

The second group of vulnerable individuals mentioned earlier is the group that receives social grants, such as old age pensions (OAPs), disability grants and child support grants (CSGs). Since many grants are means tested, they tend to form an integral source of income for many poor households. Thus, any changes in individuals' eligibility for these grants may have important ramifications not only for the individual concerned, but for the entire household, which is often heavily reliant on the grant income. Figure 9 indicates that, nationally, household access to social grants nearly trebled between 1995 and 2003, from 11.6 per cent of households to 32.8 per cent, an increase that was steady over the period. All provinces saw similar trends of increasing household access to grants over the period. In 2003, household access to grants was particularly high in Limpopo and the Eastern Cape, two of the country's poorest provinces, where 47.6 per cent and 46.1 per cent respectively of households were accessing one or more social grants. These two provinces also saw the largest increases in

access rates, namely 28.6 percentage points in the Eastern Cape and 35.0 percentage points in Limpopo. In most other provinces, between 30 per cent and 40 per cent of households were accessing at least one grant. The only two provinces where access rates were below 30 per cent in 2003 were the Western Cape, with an access rate of 24.7 per cent, and Gauteng, with an access rate of 20.2 per cent.

**Figure 9: Household Access to Social Grants, by Province, 1995-2003**



Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

Notes: 1. The grants included in the questionnaires have changed slightly over time, as have some of the eligibility criteria. In 1995, the grants included were the OAP, disability grants and 'other grants'. In 1999, the OAP, disability grants, state child support, care dependency, and foster care grants were included. In 2001, 'grants' referred to the OAP, disability grants, the CSG, care dependency, foster care, grant in aid, and social relief. In 2003, the OAP, disability grants, the CSG, foster care, grant in aid, and social relief were included. Thus, this figure should not be interpreted as representing take-up rates of a fixed 'basket' of grants, but rather as an indication of the coverage of the grant system.

The third vulnerable group is the disabled. The questions regarding disability are not standard across questionnaires. In 1995, respondents are asked, "Which, if any, of the following handicaps/disabilities does ... have?" with options for sight, hearing/speech, physical or mental disabilities. In 1999, the survey first asks whether the individual is "limited in his/her daily activities ... because of a long-term physical or mental condition (lasting six months or more)". If the individual answers in the affirmative, he or she may indicate that they have difficulty in seeing, hearing, communicating, moving, standing, or grasping, or have intellectual or emotional difficulties. Census 2001 asks whether the respondent has "any serious disability that prevents his/her full participation in life activities", and classifies such difficulties as sight, hearing, communication, physical, intellectual or emotional. In the 2003 GHS, individuals are asked whether they are limited in their "daily activities ... because of a long-term physical, sensory, hearing, intellectual, or psychological condition, lasting six months or more". Here, disabilities are recorded as being sight, hearing, communicating, physical, intellectual or emotional difficulties. As a result, estimates of the proportion of individuals with disabilities are not stable (Table 13). Perhaps the two most comparable estimates would be from the 1999 OHS and the 2003 GHS, as both of these surveys stipulate that the difficulty or disability must have lasted six months or more.

Table 13 presents disability rates for three groups, namely the population as a whole, children up to the age of 18 years and the working-age population (15 to 64 years), provincially. Comparing the 1999 and 2003 estimates, it appears that between 2.5 per cent and 3.5 per cent of the population had some sort of disability. The disability rate was lower amongst children (1.3 per cent and 0.7 per cent in 1999

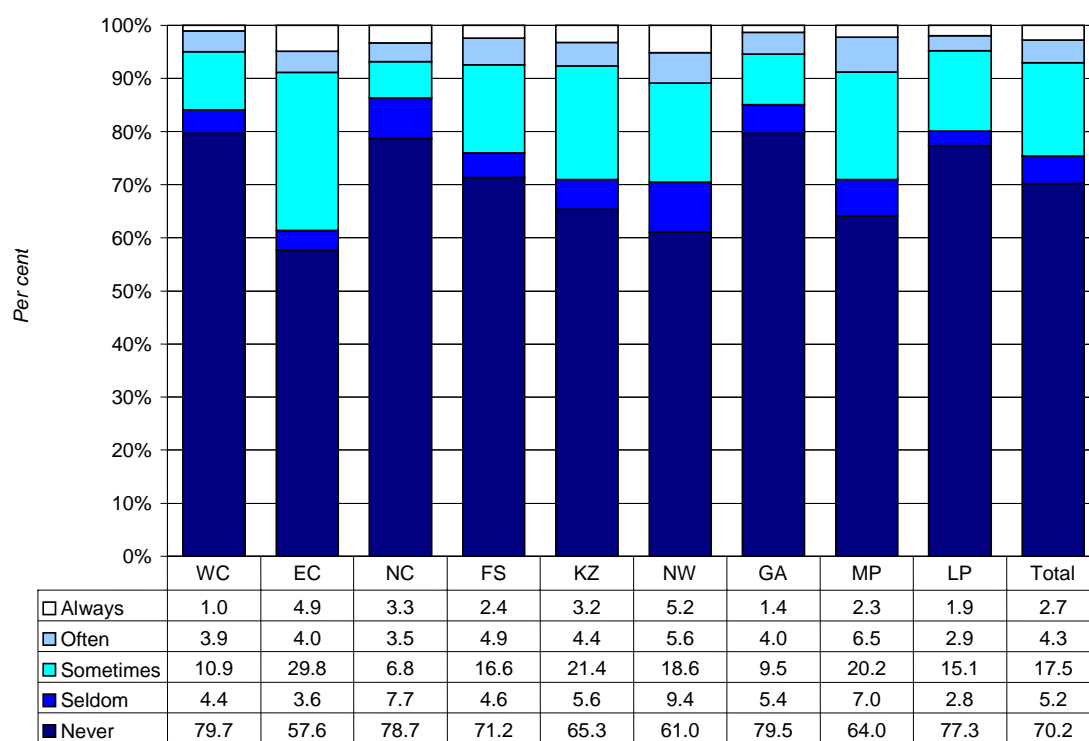
and 2003 respectively) and slightly higher amongst the working-age population (4.0 per cent and 3.0 per cent) than the national average. Unfortunately, the instability of the disability rates means that trends are difficult to identify and that provincial rankings are unstable from year to year.

**Table 13: National and Provincial Disability Rates, 1995-2003**

		WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
All	1995	4.4	4.8	6.2	8.4	5.4	5.1	4.1	3.4	4.5	4.9
	1999	4.3	4.5	4.0	3.6	3.4	3.5	2.4	3.4	2.8	3.4
	2001	4.2	5.8	5.3	6.9	5.0	5.9	3.8	5.8	5.1	5.1
	2003	3.5	2.5	4.1	2.9	1.9	2.9	2.1	2.7	2.7	2.5
0-18 Years	1995	1.5	1.3	---	3.6	2.1	2.3	1.9	1.8	1.8	1.9
	1999	1.9	2.0	---	1.5	1.2	1.0	0.8	1.3	1.0	1.3
	2001	1.9	2.1	---	3.3	2.7	2.3	2.0	3.1	2.7	2.4
	2003	1.1	0.6	---	---	0.6	---	0.8	---	0.9	0.7
15-64 Years	1995	5.0	6.0	7.1	9.3	6.0	5.5	4.4	3.8	5.4	5.5
	1999	4.6	5.6	4.8	3.9	4.3	4.1	2.5	4.2	3.7	4.0
	2001	4.5	6.9	5.9	7.5	5.6	6.3	3.7	6.5	5.8	5.5
	2003	4.1	3.4	4.7	3.2	2.3	3.2	2.1	3.4	3.7	3.0

Source: OHS 1995, OHS 1999, Census 2001, GHS 2003 (Statistics South Africa).

**Figure 10: Incidence of Child Hunger amongst Households, by Province, 2003**



Source: GHS 2003 (Statistics South Africa).

The fourth group of individuals is children in households that are unable to obtain sufficient food. The incidence of hunger amongst children is a key indicator of standard of living and has a serious impact on the education of affected children. Unfortunately, only the 2003 GHS has data on this topic, asking, "In the past 12 months, did any child (17 years or younger) in this household go hungry because there wasn't enough food?" The frequency with which households are faced with this problem is presented in Figure 10 above by province.

Most households (70.2 per cent) in South Africa reported that children never went hungry. In four provinces, namely the Western Cape, the Northern Cape, Gauteng and Limpopo, more than three-quarters of households reported never having this problem. However, only 57.6 per cent of Eastern Cape households and 61.0 per cent of North West households reported that children in the household never went hungry. Nationally, 5.2 per cent of households seldom faced this problem, while children in 17.5 per cent of households sometimes went hungry. Approximately seven per cent of households were often or always unable to obtain sufficient food for child members. It is disheartening to note that more than one-third of children in the Eastern Cape sometimes, often, or always went hungry. The lack of a basic essential such as food is a clear signal of impoverishment. Child hunger also appeared to be a severe problem in the North West province, where more than one in ten households reported that children experienced hunger often or always. It is interesting to note that in Limpopo just under 5 per cent of households reported that children often or always went hungry during the period, which is rather surprising given that the province, as seen thus far, is one of the country's two poorest provinces, the other being the Eastern Cape.

Finally, a useful indicator of vulnerable or stressed populations is the dependency ratio. This measure is characteristically the ratio of dependents, namely children (aged zero to 14 years) and people over 64 years of age (termed 'elderly' here), to the working-age population (15 to 64 years), and provides a measure for the extent of dependence on the working-age population. Higher numbers imply that there are relatively few working-age people compared to non-working-age people and that the latter depend relatively highly on the former, while the opposite is true of lower numbers. The definition of the dependency ratio can be adapted, however, depending on the aim of the analysis. Since we are here concerned about education, two alternative definitions are considered. The first definition is a slight adaptation of the definition described above, defining the dependency ratio as the proportion of zero to 18 year olds and those over 64 years to the age-group from 19 and 64 years. The second definition takes a slightly different tack and compares the number of non-workers to the number of workers. Since the unemployment rate in South Africa is so high, this perhaps provides a better indication of the extent of dependence of the average household (although it does not take into account many poor households' reliance on pension income).

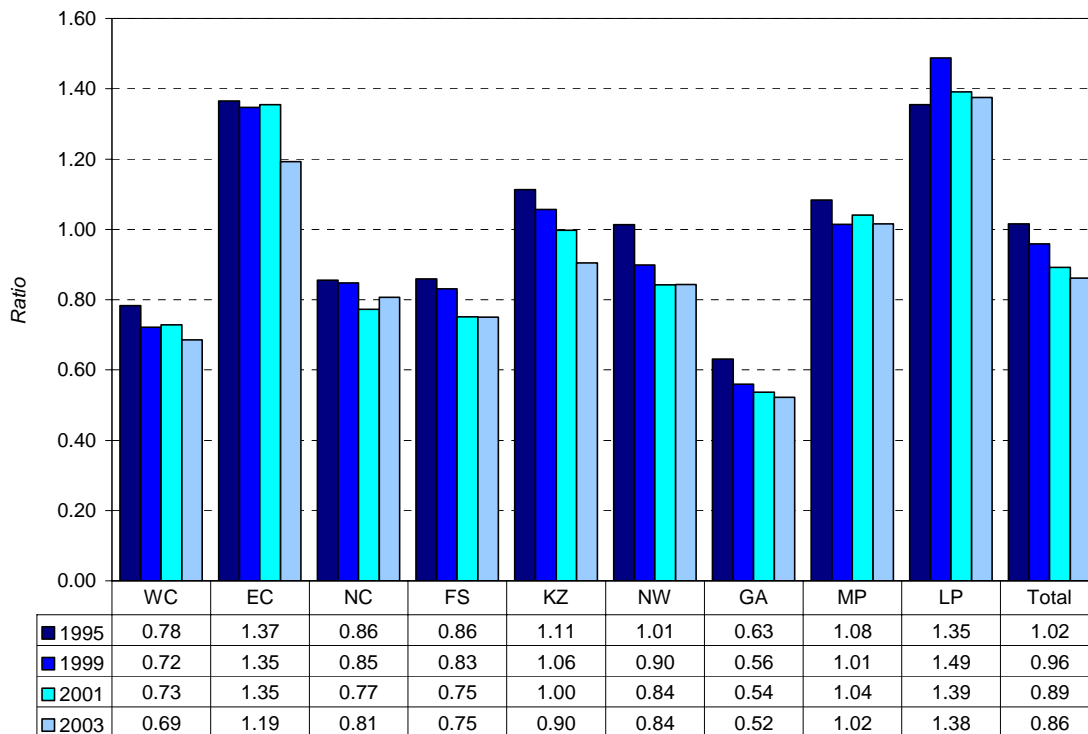
According to the first, more standard definition, the average household dependency ratio fell steadily from 1.02 in 1995 to 0.86 in 2003, implying that the burden placed by children and elderly individuals on the working-age population had declined (Figure 11). In fact, this means that the working-age population went from being slightly outnumbered by the non-working-age population to outnumbering them. Provincially, average household dependency ratios varied widely between 0.5 and 1.4. The lowest ratios were observed in Gauteng and the Western Cape at 0.52 and 0.69 respectively. Most of the other provinces had average ratios of below 1.00, KwaZulu-Natal and North West being the only provinces to move from ratios of more than 1.00 to less than 1.00. The highest ratio was observed for Limpopo, where the average household had one adult for every 1.38 children and elderly members. In the Eastern Cape, the dependency ratio was 1.19.

Depending on the definition used, dependency ratios are likely to differ depending on the demographic composition of the household. Consequently, varying demographic trends across racial lines are likely to affect dependency ratios, particularly when defined using age-groups. Africans had the highest dependency ratios, which declined from 1.14 in 1995 to 0.93 in 2003 (Table 14). The average household dependency ratio amongst Coloureds was 0.84 in 2003, down from 0.94 eight years earlier. Asian and White households had the lowest dependency ratios of 0.53 and 0.49 respectively in 2003. Like the national average, race-based household dependency ratios declined for all race groups. However, there were substantial differences within race groups on a provincial basis. Thus, African households in the Eastern Cape and Limpopo were characterised by the highest dependency ratios of any group, at 1.27 and 1.40 respectively. These ratios have fallen over time in the Eastern Cape, but remained stable in Limpopo over the period. In 1995, African households in the Eastern Cape had a dependency ratio of 1.47. Thus, in a household of, say, ten people, six members were either younger than 15 years of age or older than 64 years. In contrast, African households in Gauteng and the Western Cape had substantially lower dependency ratios of 0.52 and 0.57 in 2003, while the Free State's was 0.77. These lower ratios can be linked to the migration of working-age individuals to these provinces in search of work.<sup>2</sup> Amongst White households, average dependency ratios were almost exclusively below 0.6 in 2003, with that of Mpumalanga being 0.61. Most were around 0.5, with only KwaZulu-Natal being significantly lower at 0.38. Thus, in Mpumalanga, in an 'average' White

<sup>2</sup> Although the Free State is perhaps not known as a major job-providing province, mining activities in this province are likely to have attracted a substantial number of working-age individuals to the province.

household of five individuals, approximately two would not be between 15 and 64 years. In KwaZulu-Natal, this fell to fewer than 1.5.

**Figure 11: Ratio of Children + Elderly to 19-64 Year Olds, by Province, 1995-2003**



Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

**Table 14: Ratio of Children + Elderly to 19-64 Year Olds, by Province and Race, 1995-2003**

		WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
African	1995	0.79	1.47	0.83	0.90	1.25	1.06	0.64	1.14	1.39	1.14
	1999	0.66	1.47	0.82	0.87	1.16	0.93	0.56	1.07	1.52	1.06
	2001	0.67	1.46	0.71	0.77	1.09	0.86	0.53	1.07	1.41	0.96
	2003	0.57	1.27	0.72	0.77	0.99	0.87	0.52	1.05	1.40	0.93
Col'ored	1995	0.89	1.06	0.95	0.98	1.07	1.23	0.93	---	---	0.94
	1999	0.88	0.88	0.95	0.90	0.60	---	0.98	---	---	0.89
	2001	0.89	0.90	0.93	0.84	1.07	0.92	0.68	---	---	0.87
	2003	0.82	0.85	0.98	1.05	0.84	---	0.83	---	---	0.84
Asian	1995	---	---	---	---	0.72	---	0.73	---	---	0.73
	1999	0.90	---	---	---	0.68	---	0.68	---	---	0.68
	2001	---	---	---	---	0.56	---	0.62	---	---	0.57
	2003	0.40	---	---	---	0.53	---	0.49	---	---	0.53
White	1995	0.60	0.61	0.65	0.59	0.56	0.66	0.57	0.72	0.62	0.59
	1999	0.47	0.52	0.59	0.55	0.55	0.62	0.49	0.55	0.71	0.52
	2001	0.46	0.62	0.51	0.64	0.50	0.57	0.53	0.65	0.57	0.53
	2003	0.51	0.47	0.49	0.57	0.38	0.47	0.49	0.61	0.55	0.49

Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

The variant of the dependency ratio that is presented in **Error! Reference source not found.** compares the number of non-workers to workers in the 'average' household. This definition perhaps provides a more refined measure of dependence, specifically dependence on wage or salary income, and will be referred to as the 'worker dependency ratio' for the sake of convenience. Predictably, this ratio is higher than the ratio using the standard definition: in 1995, non-workers outnumbered workers by 2.35 to one, and the ratio declined steadily to 1.86 to one in 2003. This decline is unexpected,



given the fact that employment growth has been unable to keep pace with labour force growth over the period (Oosthuizen & Bhorat 2004). However, employment growth has, in fact, outpaced *population* growth over the period, hence contributing to a lower dependency ratio. At the same time, households have not remained unchanged over the period and the process of dissolution of old households and formation of new households may have impacted on average household dependency ratios.

In 2003, the highest worker dependency ratios were to be found in Limpopo (2.61) and the Eastern Cape (2.18). Simply put, in the average household in Limpopo, each worker was supporting 2.6 non-workers in 2003 as opposed to 3.2 non-workers in 1995. Four provinces had dependency ratios of around two, namely the Northern Cape (1.97), KwaZulu-Natal (1.92), North West (1.98) and Mpumalanga (2.10). As was seen in terms of the dependency ratios presented above, the worker dependency ratio was lowest in the Western Cape (1.68) and Gauteng (1.50). Most provinces have seen a decline in the worker dependency ratio, with some of the declines being rather substantial. For example, the ratio declined by more than 0.9 points in KwaZulu-Natal and 1.0 points in Mpumalanga.

In essence, the dependency ratios presented above provide an indication of the vulnerability of households. Where average household dependency ratios are high, households are more reliant on a small number of people and are consequently more vulnerable to shocks. In the next section, the various indicators presented here will be tabulated on a provincial basis to form a summary of living standards and poverty.

### 3.3 POVERTY SUMMARY

The purpose of section 3 has been to present data on the South African population generally, and on living conditions prevalent in the various parts of the country. This section aims to briefly summarise this information and rank provinces in terms of the prevalence of poverty across a number of indicators.<sup>3</sup> This summary is presented in Table 15 below. This information will assist in better targeting of interventions related to poverty alleviation, development, and social cohesion and support. In particular, it will assist in developing and strengthening interventions such as fee exemptions and nutrition programmes for poor learners at education institutions.

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<sup>3</sup> It is important to note that the categories chosen are arbitrary and, therefore, impact on the rankings. The inclusion of other indicators or the choice of only a subset of the listed indicators is likely to yield different rankings. The average poverty rankings are by no means based on methodologically rigorous indices, but are rather intended to provide an indication of the relative positions of provinces based on the chosen indices.

**Table 15: Summary of Poverty- and Vulnerability-Related Statistics, 2003**

	WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
Households Lacking Access to Piped Water (%)	0.9 9	40.1 1	3.4 6	3.2 7	23.0 2	9.1 5	0.9 8	9.4 4	22.2 3	13.9
Households Lacking Access to Electricity (%)	6.0 9	42.8 1	17.6 5	15.3 6	30.7 2	15.0 7	11.2 8	18.9 4	25.7 3	21.3
Households Lacking Access to Sanitation (%)	8.5 9	69.3 2	27.3 7	40.8 6	53.8 5	56.5 3	13.1 8	54.7 4	83.2 1	43.3
Share of Population in Poorest 40% Nationally	16.9 9	54.9 2	38.6 6	35.4 7	45.3 4	45.8 3	24.9 8	41.5 5	55.4 1	40.0
Orphanhood Rate (Single + Double)	13.2 9	23.9 1	16.2 8	23.0 3	23.5 2	21.4 4	16.3 7	19.7 5	19.0 6	20.3
Rate of Access to Social Grants	24.7 8	46.1 2	37.9 3	32.7 7	33.7 6	34.9 5	20.2 9	36.1 4	47.6 1	32.8
Disability Rate	3.5 2	2.5 7	4.1 1	2.9 4	1.9 9	2.9 3	2.1 8	2.7 6	2.7 5	2.5
Share of Households with Child Hunger	4.9 8.0	8.8 2.0	6.8 6.0	7.4 5.0	7.6 4.0	10.9 1.0	5.4 7.0	8.8 3.0	4.8 9.0	7.0
Average HH Ratio of Non-Workers to Workers	1.7 8	2.2 2	2.0 5	1.8 7	1.9 6	2.0 4	1.5 9	2.1 3	2.6 1	1.9
Share of Population in Rural Areas	12.1 8	66.7 2	32.5 6	32.0 7	55.4 5	64.4 3	4.3 9	60.2 4	88.1 1	45.2
Unemployment Rate	26.2 9	49.4 2	39.2 7	41.0 6	45.0 4	47.1 3	37.0 8	41.5 5	55.8 1	41.7
Share of 25-64 Without Grade 9	36.9 8	56.5 1	54.6 2	49.4 6	45.5 7	53.3 3	29.3 9	50.7 5	52.5 4	43.8
Share of 25-64 Without Grade 12	64.0 8	78.4 1	74.9 2	70.6 6	69.8 7	74.5 3	56.2 9	72.4 5	74.3 4	67.9
Average Institution Fees (Rands)	938 2	244 8	388 5	426 4	444 3	304 6	1196 1	268 7	144 9	494
<b>Ave. Poverty Ranking</b>										
- 2003	8	1	6	7	5	3	9	4	2	
- 2001	8	1	7	6	4	3	8	5	2	
- 1999	8	1	5	7	4	3	9	5	2	
- 1995	8	1	6	7	3	3	9	5	2	
<b>Human Development Index (UNDP)</b>										
- 2003	9	3	7	6	4	2	8	5	1	
- 2001	9	3	7	6	4	2	8	5	1	
- 1999	8	3	6	7	4	2	9	5	1	
- 1995	8	2	5	7	4	3	9	6	1	

Source: LFS 2003, GHS 2003 (Statistics South Africa), UNDP (2003).

- Notes: 1. Provincial rankings for each indicator are provided in italics below the relevant indicator, with 1 indicating the worst-off province and 9 the best-off province. Average poverty rankings are the provincial rankings of the average of the rankings for the fourteen indicators.
2. Indicators for 1995, 1999 and 2001, from which the presented average poverty rankings were derived, can be found in the appendix.

For each indicator selected, provinces are ranked from worst to best. The province with the worst value from a poverty perspective is given the rank of one, while the province with the best value is ranked nine. In order to obtain an overall ranking, each province's rankings across the fourteen indicators are averaged, and then these average rankings are ranked again from worst (one) to best (nine). In the case of most indicators, it was easy to decide which end of the range of values was 'good' and which end was 'bad'. Thus, for example, higher unemployment rates were deemed worse, as were higher proportions of households lacking particular services. In the case of average institution fees, however, it was difficult to decide whether a high value should be viewed in a positive or negative light. The decision was therefore taken to view higher values negatively, since higher average institution fees would be more likely to represent barriers to education to poor individuals than lower fees.

Based on these fourteen indicators, some of which will be explored in greater detail in the remaining sections of this report, the three worst-off provinces were the Eastern Cape, Limpopo and the North West. These three provinces were also very consistent in their relative rankings between 1995 and 2003. In contrast, Gauteng, the Western Cape, and the Free State were the three provinces that performed best on these indicators. Overall rankings were relatively stable over time, although it

should be noted that not all indicators calculable in 2003 were calculable in 1995, 1999 and 2001. These rankings also corresponded relatively well with the provincial rankings of the UNDP's Human Development Index (HDI) for 2003. Although their rankings were different, the three worst-performing provinces were the same according to the HDI and the average poverty ranking calculated, these being the Eastern Cape, North West and Limpopo. Similarly, the Western Cape and Gauteng were the two best-performing provinces according to both measures. The HDI, though, records improvements in the rankings of the Western Cape and the Northern Cape and declines in the rankings of the Free State and Gauteng, which are not found in the average poverty rankings.

In summary, therefore, the Eastern Cape, Limpopo and the North West are characterised, according to this measure, by the highest proportions of poor and vulnerable households and individuals which require State support. This fact is likely to impact on learners' performances at school and should therefore be taken into consideration during both the formulation of policy and the evaluation of performance. However, this fact should not be abused by provincial education departments: provinces with poor rankings should not hide behind them, while those with better rankings should not see these rankings as set in stone. All provincial education departments should, however, be aware of the characteristics of their provincial populations and should keep themselves informed of any changes in these characteristics, arising from any number of positive or negative social and economic events, that may be expected in the future.

## 4. INDICATORS OF EDUCATION AND DEMOGRAPHIC INTERACTIONS

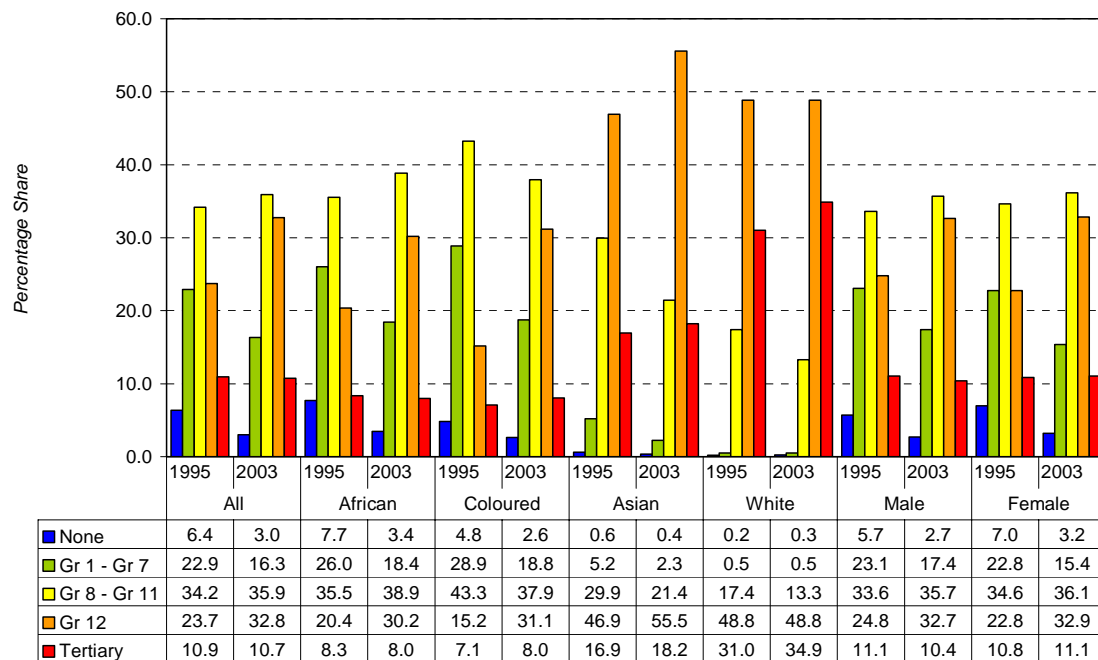
### 4.1 BROAD EDUCATION INDICATORS

#### a. Overall

##### i. Educational Attainment of Adults

Changes in education trends, which are partly related to changes in access to education, are one of the many important areas of interest. In this regard, adults' highest levels of education are key to assessing the impacts of the various policy and other changes in the post-apartheid era. Educational attainment across the broader adult population will not change rapidly, however, and therefore it is probably more useful to look at changes amongst 25 to 34 year olds (see Figure 12).

**Figure 12: Highest Level of Education by Race and Gender, 25-34 Year Olds, 1995 & 2003**



Source: OHS 1995, LFS 2003 (Statistics South Africa).

Educational attainment is classified into five categories, namely no education, grade 1 to grade 7 (some or complete primary education), grade 8 to grade 11 (some secondary education), grade 12 (complete secondary education) and tertiary education. The figure reveals that the single largest category amongst 25 to 34 year olds is incomplete secondary education, representing approximately 35 per cent of this age-group. Primary education and matric also account for large proportions of the population. The interesting and encouraging development over the period 1995 to 2003 has been the rise in the proportion that has a matric certificate (24 per cent in 1995 vs. 33 per cent in 2003). At the same time, the proportion of individuals with only a primary education declined around seven percentage points to 16 per cent in 2003, while the proportion of individuals with no formal education fell by half to three per cent. However, the proportion of individuals with a tertiary education (which includes any post-matric qualification, not just a university degree) remained unchanged at just under 11 per cent.

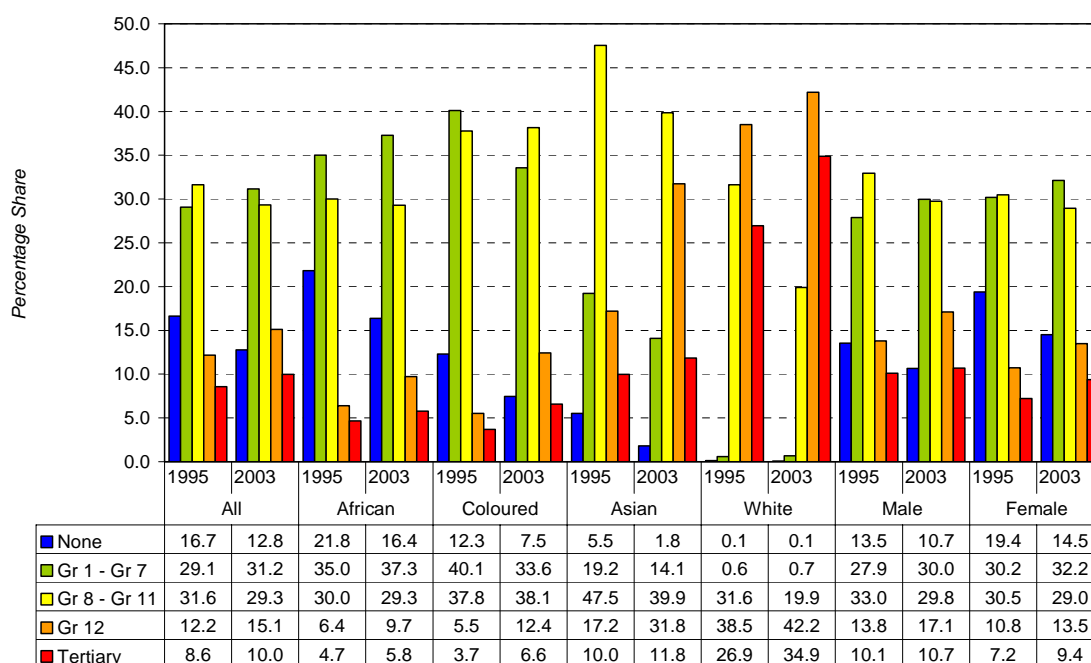
The patterns within individual race and gender groups reveal a general upgrading in education levels amongst all groups, although inter-racial comparisons continue to reflect historical education patterns that arose within the context of apartheid. On the one hand, Africans and Coloureds most often have incomplete secondary education (39 per cent and 38 per cent in 2003), while on the other hand,

Asians and Whites are most often in possession of a matric certificate (56 per cent and 49 per cent in 2003). The rise in the proportion of individuals with matric noted earlier is clearly evident amongst Africans and Coloureds, in particular, and this has been accompanied by declining proportions of individuals in these groups with only primary education and with no formal education. However, no significant shifts were observed in the proportions of Africans and Coloureds with tertiary education, such that in 2003 only eight per cent had some sort of post-school qualification. In contrast, amongst Whites, tertiary qualification rates increased by four percentage points to around 35 per cent, while less than one per cent did not have some kind of secondary education. The final two groups of columns, representing male and female educational attainment, reveal no marked differences in the patterns of male and female education levels, merely echoing the overall pattern.

In terms of the provinces, Gauteng had the highest proportion of individuals in this age-group with matric or tertiary education at 54 per cent in 2003, up from 46 per cent in 1995. The proportion for the Western Cape rose more than eleven percentage points to 44 per cent in 2003, while that of Mpumalanga rose 15 percentage points to 43 per cent, placing these two provinces second and third respectively, only slightly ahead of KwaZulu-Natal and the Free State. This does not mean that these provinces have performed best in terms of raising the education levels of their populations, as the figures are blurred by migration, particularly as this age-group is a highly mobile group. Nevertheless, improvements in educational attainment are present across all provinces, particularly for the very low education categories.

The difference between younger adults and older adults (defined here as 35 to 64 year olds) is quite stark (Figure 13). In 2003, nearly 13 per cent of older adults had no education, which is more than four times the level for younger adults. The prevalence of no formal education was highest amongst Africans (22 per cent in 1995 and 16 per cent in 2003) and, to a lesser extent, Coloureds, while females more often had no education than their male counterparts (just under 15 per cent in 2003). Two categories dominate the overall education structures, as well as those of Africans and Coloureds, namely primary education and incomplete secondary education, representing 31 per cent and 29 per cent of all individuals in this age-group respectively. Incomplete and complete secondary education were the dominant categories amongst Asians, while most Whites had a matric certificate or a tertiary qualification as their highest level of education. Around 35 per cent of Whites in this age-group had tertiary qualifications while 42 per cent had completed their secondary educations.

**Figure 13: Highest Level of Education by Race and Gender, 35-64 Year Olds, 1995 & 2003**



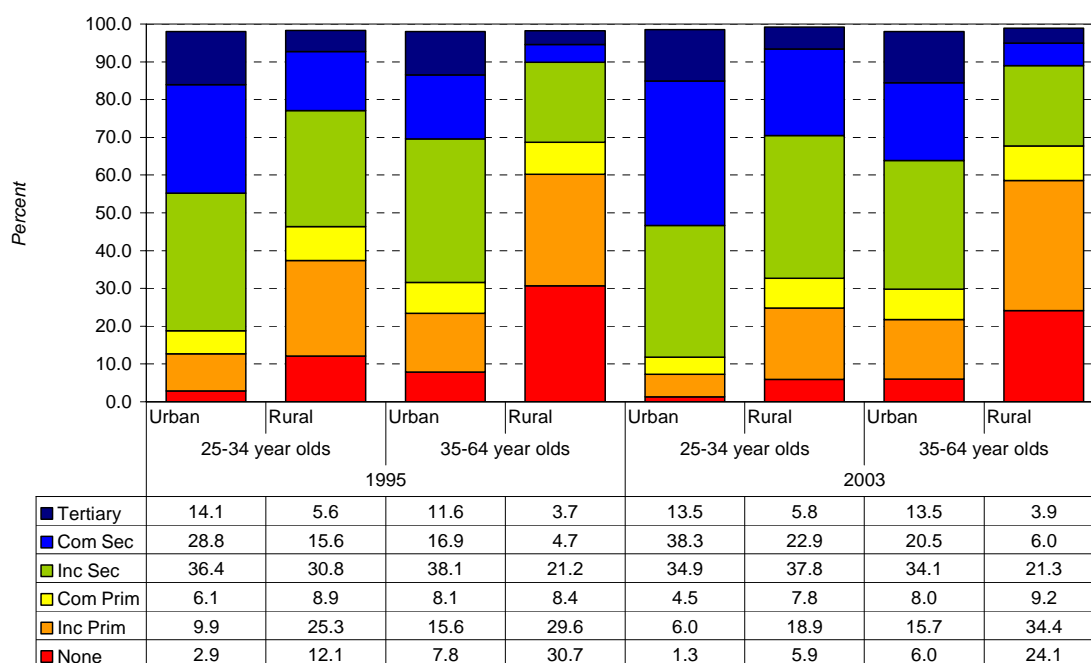
Source: OHS 1995, LFS 2003 (Statistics South Africa).

The figure provides some insight as to the distribution of educational attainment within and across race groups generated within the apartheid system, and reveals a clear racial stratification. However,

the years since 1995 have seen improvements in the educational profile of this age-group, which is generally an age-group with relatively low levels of participation in education. This improvement is related to the in-flow of younger individuals with relatively better educations across racial groups as well as older relatively less educated individuals exiting this group.

Individuals' educational attainment also appears to be related to their location (Figure 14). The figure presents changes in the profile of educational attainment between 1995 and 2003 of urban and rural residents in two age-groups, namely those aged 25 to 34 years and those aged 35 to 64 years. At first glance, it appears that access to education opportunities may be higher in urban areas than rural areas, since urban individuals are significantly more likely than their rural counterparts to have completed secondary or tertiary education. In 2003, 38.3 per cent of urban 25 to 34 year olds had completed matric, compared to 22.9 per cent of their rural counterparts. Similarly, within this age-group, 13.5 per cent of urban residents had a tertiary qualification while this was true of only 5.8 per cent of rural residents. Amongst older individuals, this difference was even more pronounced: even fewer 35 to 64 year olds had completed tertiary education in 2003, while a mere 6.0 per cent had completed matric. Conversely, the evidence suggests that rural individuals are more likely than those in urban areas to leave the education system at an early stage. Thus, amongst 25 to 34 year olds, 7.8 per cent of rural individuals had a grade 7 education (compared to 4.5 per cent of urban individuals), 18.9 per cent had an incomplete primary education (6.0 per cent amongst urban individuals) and 5.9 per cent had no education (1.3 per cent of urban dwellers). A similar pattern is observed amongst 35 to 64 year olds where close to three-fifths had incomplete primary education or less. However, it is important to also consider that better-educated individuals in rural areas may be more likely to migrate to urban areas.

**Figure 14: Educational Attainment of Adult Population by Location, 1995 & 2003**



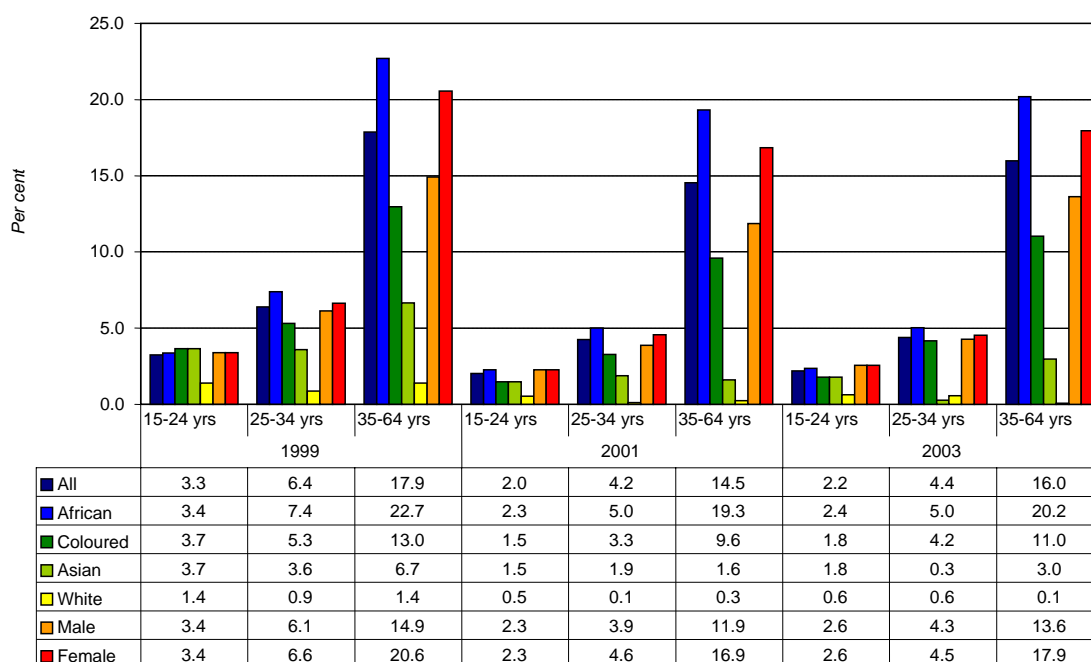
Source: OHS 1995, LFS 2003 (Statistics South Africa).

Between 1995 and 2003, there were marked improvements with regard to educational attainment, a development that has been highlighted above. The proportion of the population with no schooling fell for both age cohorts in urban and rural areas. This decrease was offset by an increase in the proportion of the population who matriculated. Thus in 2003, more than half of 25 to 34 year olds in urban areas and one in three in rural areas had matriculated. It therefore appears that access to education improved in both urban and rural areas.

However, it is important to keep in mind that these figures are muddled by migration between urban and rural areas. If better-educated rural dwellers are more likely to migrate than less-educated rural dwellers (this is particularly likely to be true for tertiary educated individuals), the rural proportions presented in the figure are likely to be biased towards the lower end of the distribution while the urban proportions are likely to be biased towards the upper end.

The proportion of individuals with no formal education aligns relatively well with the proportion of individuals who are illiterate (defined as being unable to read or write in any language). Overall, fewer than nine per cent of adults between the ages of 15 and 64 years were illiterate and could, therefore, neither read nor write in any language (Figure 15). It is also clear that the problem of illiteracy was most severe amongst older individuals: in 2003, 16 per cent of 35 to 64 year olds were classified illiterate, compared to four per cent of 25 to 34 year olds and two per cent of 15 to 24 year olds. It seems that access to education that provides reading and writing skills has improved, even prior to the 1990s. Inter-racial comparisons reveal a distinct disadvantage of Africans relative to Coloureds, relative to Asians, relative to Whites, particularly amongst older individuals. Around one-fifth of Africans between the ages of 35 and 64 years were illiterate in 2003, compared to 11 per cent of Coloureds and three per cent of Asians. Virtually no Whites in this age-group were illiterate. Amongst 25 to 34 year olds, illiteracy was highest amongst Africans and Coloureds (five per cent and four per cent respectively) and the band (between the highest and lowest illiteracy rates) was around 4.5 percentage points. Amongst 15 to 24 year olds, there was relatively little difference between race groups, with illiteracy rates ranging between 2.4 and 0.6 per cent.

**Figure 15: Adult Illiteracy Rates by Race and Gender, 1999-2003**



Source: OHS 1995, LFS 2001, LFS 2003 (Statistics South Africa).

Around 9.5 per cent of females were illiterate, compared to 7.5 per cent of males, across the three age-groups. Again, the gap was most pronounced amongst 35 to 64 year olds: in 2003, 18 per cent of females in this age-group were illiterate, compared to under 14 per cent of males. In contrast, there was no difference between male and female rates of illiteracy amongst 15 to 24 year olds, indicating a favourable situation regarding gender equality in basic education.

## **ii. Attendance at Educational Institutions**

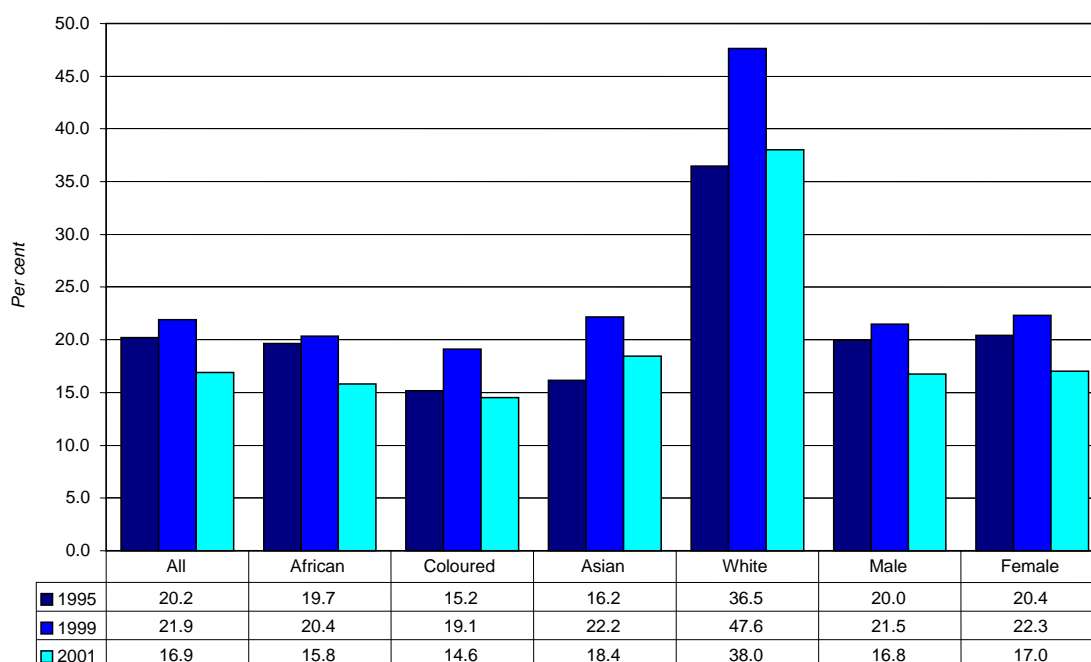
Enrolment rates are one of the more common educational indicators used internationally, providing useful information on equality of access to education typically by gender. Unfortunately, though, South African national household surveys do not ask whether individuals are enrolled or not, but rather ascertain whether an individual is attending an education institution. In a sense, attendance rather than enrolment rates may be a better measure, as enrolment does not automatically translate into attendance, although questions about children's attendance may not always be answered truthfully by respondents who fear repercussions after revealing that the children do not attend.

Attendance rates have been calculated for four age-groups, namely children under seven years of age, those between seven and 15 years of age (in other words those who ought to be in the GET phase), those aged 16 to 18 years (who ought to be in the FET phase) and 19 to 24 year olds (who

would normally engage in higher education). The assumption underlying the following analysis is that these age groupings are involved in education at an appropriate age and institution. As a result of age-inappropriate enrolment and errors relating to self-reporting, these figures are a guide to attendance rate trends in the population, rather than absolute indicators. It should be possible to refine this in a more focused survey to compute attendance at particular institutions at a later stage. At the moment, limitations due to self-reporting of attendance by institution by respondents to the household surveys apply. In addition, strictly speaking, there is a difference between the attendance rates of these age groups, since enrolment/attendance is only compulsory for seven to 15 year olds, and since attendance and effective enrolment or participation in the education system may vary. Perhaps a more appropriate term for the attendance rates of the remaining groups would be participation rates, particularly for those under seven years and for 19 to 24 year olds.

Approximately one-fifth of children under the age of seven attended pre-school, crèche or daycare in 1999, marginally up on the 1995 figure (Figure 16). Similar attendance rates were recorded for Africans, Coloureds and Asians in 1999 of around 19 to 22 per cent. In contrast, nearly half of White children in this age-group attended some kind of educational or daycare institution. This difference may be related to greater reliance amongst Africans, Coloureds and Asians on extended family to look after young children, which may in turn be linked to affordability. Consequently, better-off households are more likely to be financially able to send children to these institutions, while poorer households tend to utilise extended family connections. Between 1995 and 1999, attendance rates increased for children of all race groups, although they declined subsequently, in some instances to levels below those of 1995. Part of this increase and decrease, though, may be related to a difference in the questionnaires, where, unlike in 1995, the 1999 explicitly asks about attendance at pre-primary and reception classes and, therefore, possibly biases attendance rates upwards in 1999. In 2001, in contrast, only pre-school attendance was measured, although it is unclear as to how strictly this was interpreted. Further evidence of equal access to education across gender groups is found in the very similar attendance rates for boys and girls in this age-group.

**Figure 16: Pre-School, Crèche or Daycare Attendance for Under-7s by Race and Gender, 1995-2001**



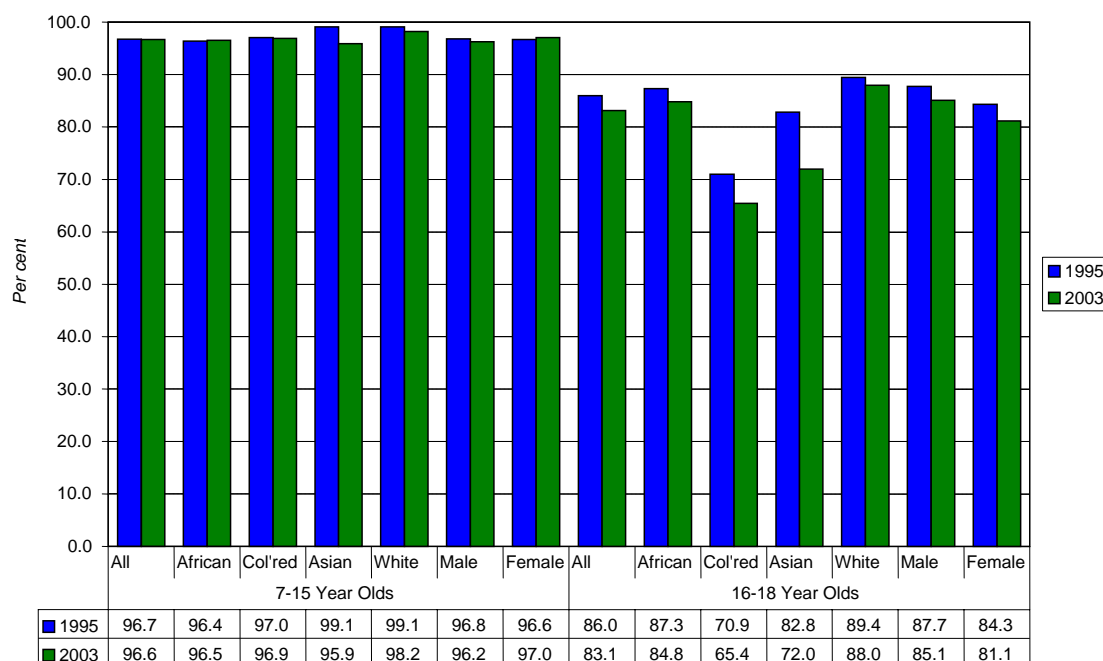
Source: OHS 1995, OHS 1999, Census 2001 (Statistics South Africa).

Notes: 1. In 1995, the children are reported to be attending pre-school, crèche or daycare, while in 1999, the applicable institutions are pre-primary or reception classes at primary schools, crèches, edu-care centres or pre-schools. The 2001 Census asks children's current attendance, with the only relevant option for our purposes being "pre-school". Data for 2003 are unavailable due to the LFSs and GHSs not including the relevant question.



School attendance rates for seven to 15 year olds remained relatively high at 96.6 per cent in 2003 (Figure 17). This was true across race groups as well as for both boys and girls, while there was no significant change in attendance rates between 1995 and 2003. Similarly, on a provincial level, attendance rates were relatively similar, ranging between 94.6 per cent (Northern Cape) and 98.1 per cent (Gauteng). However, there were 9.1 million children in this age-group, meaning that the 3.4 per cent “non-attendance” rate translated to more than 310 000 children. The provinces with the lowest attendance rates in 2003 were the Northern Cape (94.6 per cent), the Eastern Cape (95.1 per cent), North West (95.4 per cent) and KwaZulu-Natal (95.9 per cent). These provinces accounted for around two-thirds of all children who did not attend school, while half of non-attenders were to be found in the Eastern Cape and KwaZulu-Natal alone.

**Figure 17: School Attendance of 7-15 Year Olds and 16-18 Year Olds, 1995 & 2003**



Source: OHS 1995, LFS 2003 (Statistics South Africa).

There was a significant drop in attendance rates for 16 to 18 year olds compared to seven to 15 year olds. Only 83.1 per cent of this age-group reported attending school in 2003, which is slightly lower than the 86.0 per cent estimated for 1995. Amongst this age-group, however, the evenness of attendance rates found for seven to 15 year olds is not evident, with some significant variation across race and gender groups. In gender terms, males are less likely to drop out of school in this age-group, with the male attendance rate of 85.1 per cent being four percentage points higher than that of females. This is related to households' apparent preference for females to look after and care for family members or to manage and run the household, apart from the fact that pregnancy, as a reason for not attending school, affects only females. Approximately 10 per cent of females (between seven and 18 years of age) not attending an educational institution in 2003 were not attending due to pregnancy (see Figure 38 for further discussion). Ignoring pregnancy as a reason, family commitment was cited as the reason for not attending an educational institution by 9.1 per cent of non-attending females, as opposed to just 0.4 per cent of non-attending males.

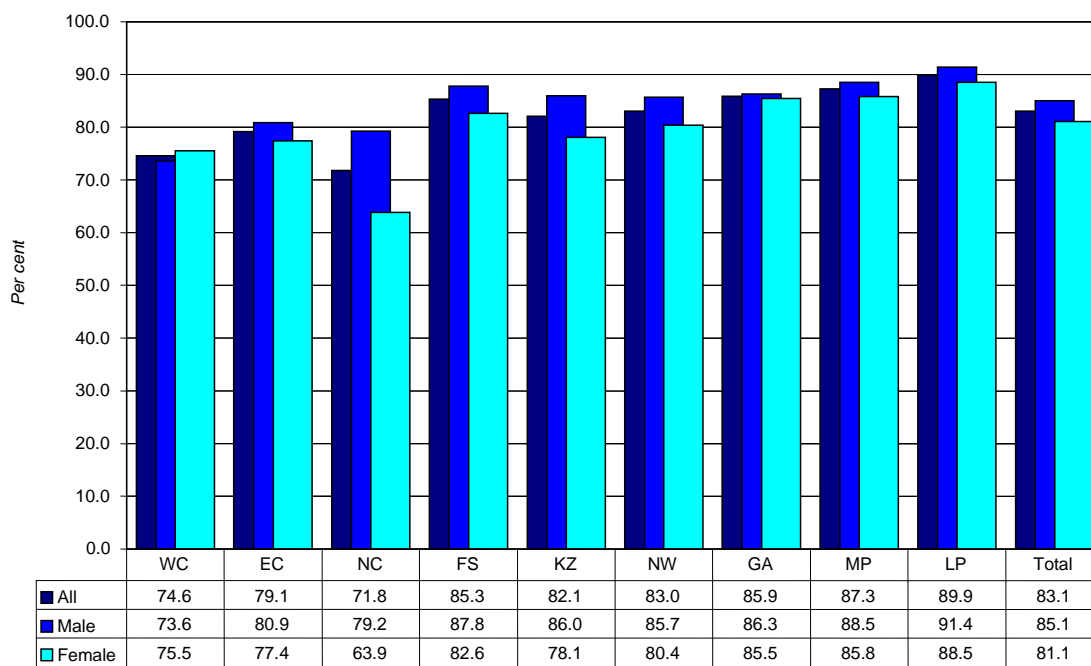
Coloured individuals in this age-group were most likely to drop out of school: in 2003, less than two-thirds of Coloured 16 to 18 year olds attended school, nearly 18 percentage points lower than the national average. Amongst Asians, too, attendance rates were below the national average at 72.0 per cent.<sup>4</sup> Africans and Whites had the highest attendance rates in this age-group, with nearly 85 per cent

<sup>4</sup> Although the sample size here is relatively small (65 000 individuals), in KwaZulu-Natal, where the Asian population is concentrated and would therefore be likely to be best captured, attendance rates are even lower at approximately 68 per cent.

of African and 88.0 per cent of White 16-18 year olds attending school in 2003. The very low attendance rate amongst Coloureds is, therefore, quite interesting when contrasted with that of Africans. It would seem that dropping out of school at this level may not be entirely driven by necessity or poverty: Africans, generally, are the poorest race group in South Africa and, therefore, if poverty were the sole reason underlying lowered attendance rates, Africans should arguably have attendance rates lower than Coloureds. Instead, it seems that, amongst Coloureds and Asians, leaving school is more of a choice than a necessity, that there may be different perceptions of the value of education amongst certain groups within these communities, which drive the decision to leave school before completing matric. However, it is important to remember that a 'choice' to leave school may be forced. In other words, in situations where learners are forced to leave school for reasons not related to affordability, for example where there are safety concerns or pregnancy, this is not easy to distinguish from the available data. This is clearly an important issue that will need to be investigated and addressed before the education system is able to play a meaningful role in addressing poverty in these communities and inequality on a broader level.

Provincial variations in school attendance rates for 16-18 year olds in 2003 were more widely dispersed than was the case for seven to 15 year olds (Figure 18). The Northern Cape again had the lowest attendance rate (71.8 per cent), followed by the Western Cape where 74.6 per cent of 16 to 18 year olds attended school. This is a rather surprising finding, particularly for the Western Cape, but is related to the fact that these are the two provinces in which Coloureds are most dominant (according to Census 2001, Coloureds accounted for 52 per cent and 54 per cent of the populations in the Northern Cape and Western Cape respectively (Statistics SA 2003: 12)). Limpopo, interestingly, had the highest school attendance rate in this age-group, with nine in ten individuals attending school in 2003, followed by Mpumalanga (85.8 per cent) and Gauteng (85.5 per cent). In most provinces, there was very little difference between male and female attendance rates: the Western Cape, Eastern Cape, Gauteng, Mpumalanga and Limpopo had attendance rate differentials of under four percentage points. In contrast, in the Northern Cape and KwaZulu-Natal, the difference in attendance rates for males and females was substantial. Just under 80 per cent of Northern Cape males in this age-group attended school, compared to just 63.9 per cent of females in the province, a difference of more than 15 percentage points. Similarly, 86.0 per cent of males in KwaZulu-Natal attended school compared to 78.1 per cent of females. Overall, as mentioned earlier, the attendance rate of males was higher than that of females, with only the Western Cape having higher female than male attendance rates (75.5 per cent vs. 73.6 per cent).

**Figure 18: School Attendance Rates for 16-18 Year Olds, by Province, 2003**

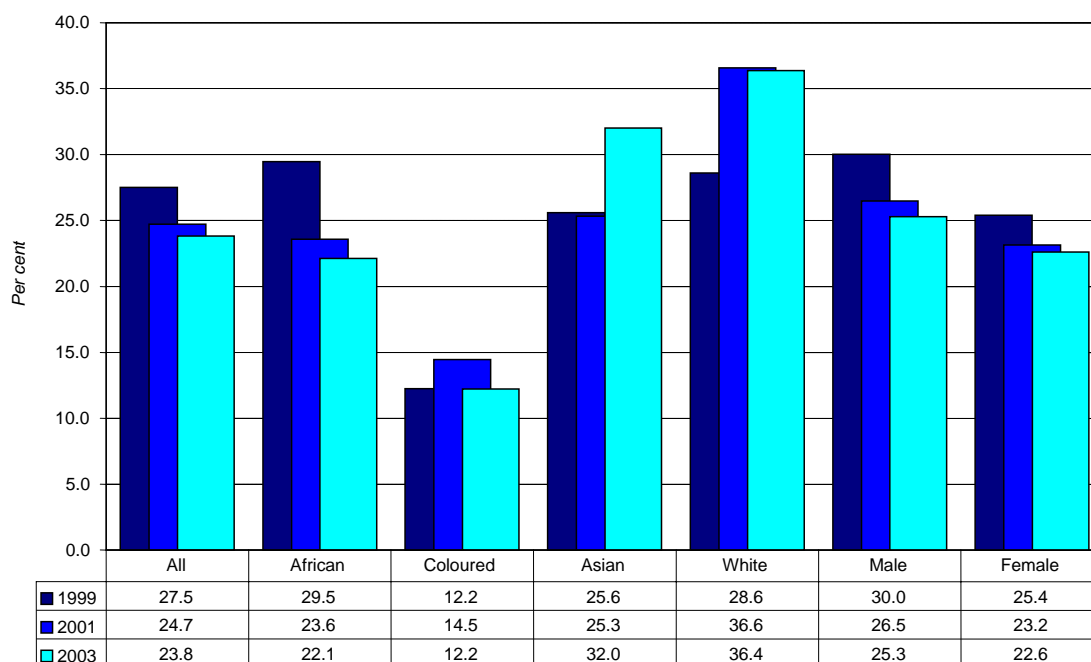


Source: LFS 2003 (Statistics South Africa).

Higher education is often seen as critical to addressing the skills constraints facing the South African economy. Therefore, it is hoped that higher education participation rates will rise over time. However, it is important to bear in mind that increased participation alone is not the key to solving the skills shortages currently experienced. It is essential that individuals in the higher education system receive training in those fields where there is a present or future unmet demand for labour or where employers feel confident that they can adjust graduates' skills through further training. In 2003, just under one-quarter of individuals between the ages of 19 and 24 years were attending a higher education institution, these including universities, technikons or colleges. Unfortunately, this represents a decline of nearly four percentage points from the 1999 participation rate, although this reduction does not quite match the enrolment observed in Higher Education institutions during that period – it may be that the average age of Higher Education participants has increased slightly in the years since 1999.

The overall higher education participation rate for 19 to 24 year olds obscures substantial variation by race and, to a lesser extent, by gender (Figure 19). In 2003, the higher education participation rate for Coloureds was lowest at 12.2 per cent, something which is undoubtedly related to low school attendance rates amongst 16 to 18 year olds referred to above. This rate is essentially unchanged since 1999. Approximately 22 per cent of Africans in this age-group attended an HE institution, down from 29.5 per cent in 1999. Both Asians and Whites experienced a significant rise in HE participation rates over the period, rising from 25.6 per cent to 32.0 per cent amongst the former and 28.6 per cent to 36.4 per cent amongst the latter. These differences in participation rates are likely to reflect varying household income levels as well as attendance rates in the 16 to 18 year age-group, but may also stem from differing perceptions of the value of higher education. Females were slightly less likely than males to be attending an HE institution (22.6 per cent vs. 25.3 per cent in 2003), which may also be related to lower female 16 to 18 year old attendance rates. Participation rates declined for both males and females, reflecting the decline amongst Africans, since Africans represented around two-thirds of all HE participants in 2003.

**Figure 19: Higher Education Participation Rates for 19-24 Year Olds, 1999-2003**



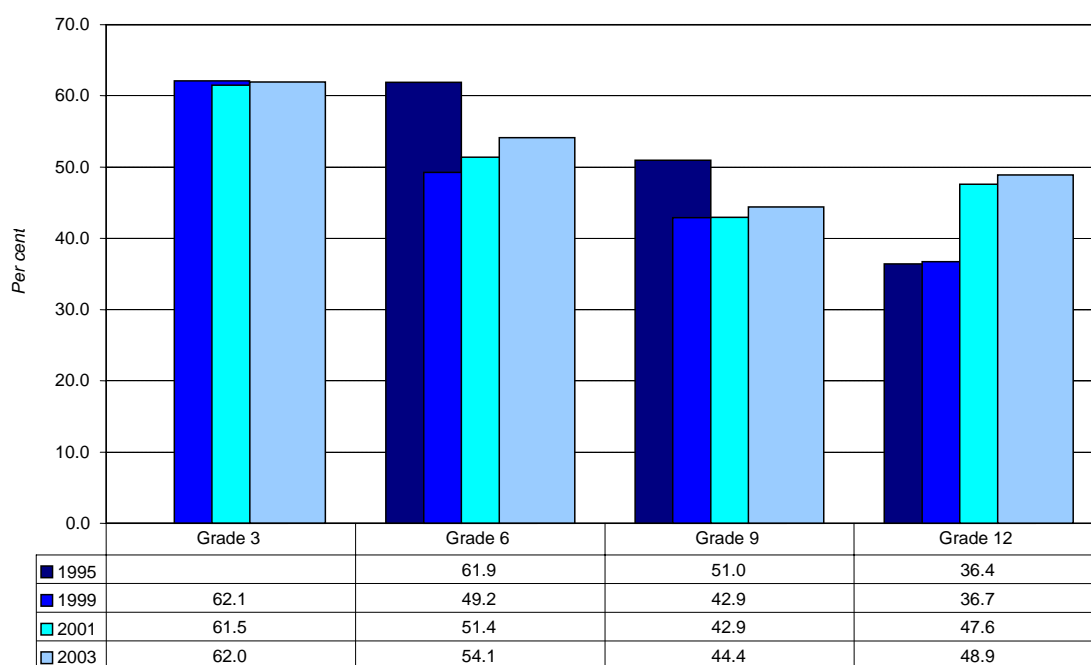
Source: OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

A further issue regarding school attendance is that learners should not be in inappropriate grades given their ages. The national Department of Education has announced that children should enrol in grade 1 in the year that they turn seven years old. Thus, learners should technically be six turning seven in grade 1, 12 turning 13 in grade 7 and 17 turning 18 in grade 12 or matric. The derivation of school attendance in age-appropriate grades is relatively difficult using household surveys, for a number of reasons. Firstly, the age-appropriate grade for, say, a seven year old may be grade 1 or grade 2, depending on whether the child is turning eight in the current year or the following year.

Secondly, household surveys do not ask about individuals' current grade, but rather ask about an individual's highest level of education *completed*. Therefore, a learner's current grade needs to be deduced by adding a grade to his/her educational attainment if he/she is currently attending school. Since the ruling on the age at which a child must start grade 1 is relatively recent and learners have, in the past, been able to start grade 1 aged five years, a three-year band of ages is deemed appropriate for any given grade. This means, for example, a grade 6 learner should be aged between 10 and 12 years to be in the 'appropriate' grade. Admittedly, this is a relatively loose criterion, but represents the best option given the available data.<sup>5</sup>

In Figure 20, trends in age-appropriate school attendance between 1995 and 2003 are presented for four grades, namely grades 3, 6, 9 and 12. As is to be expected, the general pattern is one of declining rates of age-appropriate school attendance as learners move through the grades, due largely to repetition of grades by weaker learners. Thus, in 2003, 62 per cent of grade 3's were of appropriate age (namely, between seven and nine years of age). This falls to 54.1 per cent of grade 6's, and 44.4 per cent of grade 9's. The impact of education policy in 1999, amongst other things, is clearly visible in the changed age-appropriate attendance rate in grade 12. In 1995, the downward trend observed from grade 5 (and presumably from grade 1) to grade 9 extended to grade 12, with just more than one-third of all matric learners being between the ages of 16 and 18 years, with a similar pattern prevailing in 1999. However, from 2001, age-appropriate attendance rates in grade 12 were higher than those in grade 9. In this regard, there have been at least two important changes that underlie this shift. Firstly and primarily, individuals who do not pass matric may no longer repeat matric 'indefinitely', thereby serving to reduce drastically the number of significantly over-aged learners in grade 12. Secondly, it appears that emphasis on matric pass rates at a school level may cause schools to discourage weaker learners, who were more likely to have repeated grades prior to grade 10, from continuing their education to matric. The latter phenomenon, though, is clearly on the decline as indicated in the recently observed spurt in the number of students enrolling for matric between 2003 and 2004.

**Figure 20: School Attendance in Age-Appropriate Grades, 1995-2003**



Source: OHS 1995, OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

Notes: 1. These figures are deduced by combining school attendance and educational attainment data. Thus, an individual whose highest educational attainment is, for example, grade 5 and who is currently

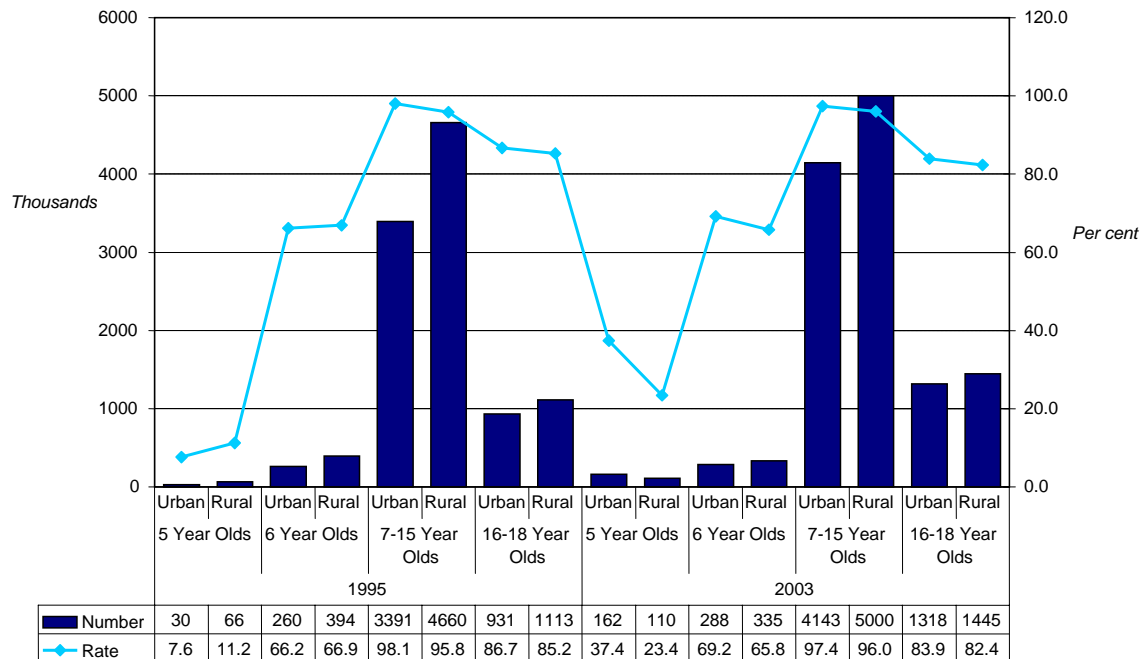
<sup>5</sup> Note that it is not possible from the data to determine age-appropriate attendance in grade 1 as one cannot differentiate between whether a six (or five or seven) year old who has no formal education is in grade 1 or in pre-primary.

*attending school is assumed to be in grade 6. Age-appropriate attendance rates are calculated as the proportion of children in a given grade who are appropriately aged.*

- 1995 data for Grade 3 are unavailable as the OHS 1995 groups grades 1-3 together, making it impossible to determine who has completed grade 2.

Social and infrastructural differences between urban and rural areas cannot be ignored in the discussion of school attendance. Figure 21 below presents school attendance figures for urban and rural areas by age in 1995 and 2003. At the outset, it is noted that the numbers of children between the ages of seven and 18 years attending school rose over the period, with the bulk of learners being in rural areas. In both 1995 and 2003, school attendance rates were marginally higher in urban areas than in rural areas for 7 to 18 year olds.

**Figure 21: School Attendance in Urban and Rural Areas, by Age and Gender, 1995 & 2003**



Source: OHS 1995 & LFS 2003 (Statistics South Africa).

Although the attendance rate for 5 year olds was low in both urban and rural areas in 1995, the attendance rate in rural areas was marginally higher at 11.2 per cent, compared to 7.6 per cent in urban areas. By 2003, school attendance had risen substantially, both numerically and proportionally, amongst this age-group. The number of urban five year olds attending school rose from 30 000 in 1995 to 162 000 in 2003, while the number of rural five year olds attending school nearly doubled to 110 000 in 2003. Thus, attendance rates rose to 37.4 per cent in urban areas and 23.4 per cent in rural areas in 2003. Two-thirds of urban and rural six year olds attended school in 1995, although by 2003, the urban attendance rate had risen to 69.2 per cent while that of rural areas had declined slightly to 65.8 per cent.

School attendance amongst seven to 15 year olds was almost universal for those living in both urban and rural areas in both periods. However, the attendance rate of those living in urban areas was marginally better than that of those living in rural areas. Furthermore, in 1995 there were eight million seven to 15 year old children attending school, which by 2003 had increased to over nine million. In both 1995 and 2003, the school attendance rates of 16 to 18 year olds were considerably lower than for seven to 15 year olds. In 2003, 83.9 per cent of urban and 82.4 per cent of rural 16 to 18 year olds attended school.

Overall, approximately 97 per cent of seven to 15 year olds reported currently attending an educational institution in 2003, as did 83 per cent of 16 to 18 year olds (Table 16). There also appears to have been very little in terms of change in attendance rates over the period amongst the younger age-group, with the attendance rate of seven to 15 year olds standing at 96.4 per cent in 1995.

However, amongst 16 to 18 year olds, the attendance rate was slightly lower than the 86.0 per cent recorded in 1995.

**Table 16: Attendance at Educational Institutions, by Race, 1995-2003**

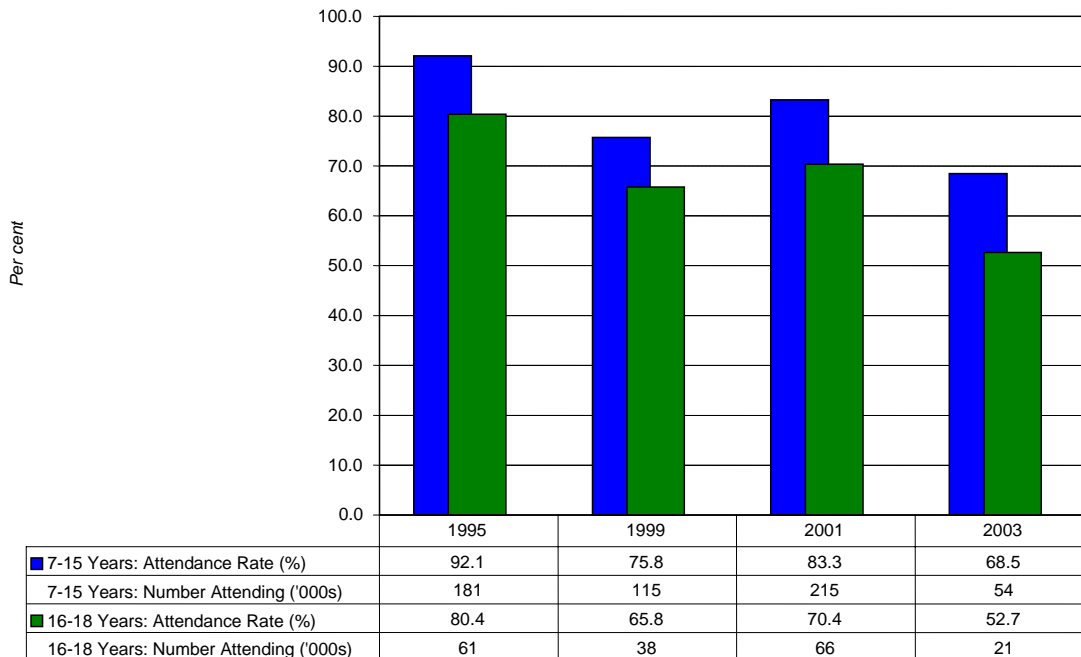
			1995	1999	2001	2003
7-15 Year Olds	All	Attending ('000s)	6728	9051	8041	9143
		Not Attending ('000s)	250	435	411	319
		Attendance Rate (%)	96.4	95.4	95.1	96.6
	African	Attending ('000s)	736	7429	6610	7703
		Not Attending ('000s)	22	372	361	278
		Attendance Rate (%)	97.0	95.2	94.8	96.5
	Coloured	Attending ('000s)	736	742	728	756
		Not Attending ('000s)	22	44	25	24
		Attendance Rate (%)	97.0	94.5	96.7	96.9
	Asian	Attending ('000s)	189	199	170	167
		Not Attending ('000s)	2	7	4	7
		Attendance Rate (%)	99.1	96.6	97.4	95.9
16-18 Year Olds	All	Attending ('000s)	672	665	526	513
		Not Attending ('000s)	6	13	20	9
		Attendance Rate (%)	99.1	98.1	96.4	98.2
	African	Attending ('000s)	2130	2306	2390	2763
		Not Attending ('000s)	348	432	504	562
		Attendance Rate (%)	86.0	84.2	82.6	83.1
	Coloured	Attending ('000s)	1730	1914	1969	2369
		Not Attending ('000s)	251	306	379	424
		Attendance Rate (%)	87.3	86.2	83.8	84.8
	Asian	Attending ('000s)	155	150	159	184
		Not Attending ('000s)	63	81	88	97
		Attendance Rate (%)	70.9	64.8	64.2	65.4
	White	Attending ('000s)	51	46	58	47
		Not Attending ('000s)	11	13	17	18
		Attendance Rate (%)	82.8	77.3	77.3	72.0
	White	Attending ('000s)	195	192	203	162
		Not Attending ('000s)	23	30	19	22
		Attendance Rate (%)	89.4	86.7	91.6	88.0

Source: OHS 1995, OHS 1999, LFS 2001 & LFS 2003 (Statistics South Africa).

Race did not appear to play a very important role in terms of seven to 15 year olds attending an educational institution, as attendance rates were relatively similar across race groups. In 2003, for example, 96.5 per cent of African children in this age-group reported attending an educational institution, as did 96.9 per cent of Coloured children, 95.9 per cent of Asian children and 98.2 per cent of White children. Over the eight year period, these attendance rates were very stable for each race group, with only that of Asians changing by more than a percentage point between 1995 and 2003 (although the total number of Asian seven to 15 year olds not attending school was a mere 7 000 and, therefore, too small to draw conclusions). Nevertheless, the attendance rate for White children in this age-group was slightly higher than those of other groups and attendance was almost universal.

In contrast, amongst 16 to 18 year olds the evidence points to some significant difference in the rates of attendance across race groups. While, nationally, 83.1 per cent of individuals in this age-group attended an educational institution of some sort, this was true of only 65.4 per cent of Coloureds and 72.0 per cent of Asians. Interestingly, African attendance in this age-group, at 84.8 per cent, was slightly higher than the national average. Almost nine in ten White individuals between the ages of 16 and 18 years reported attending an educational institution, just over three percentage points more than for Africans. Attendance rates amongst Africans, Coloureds and Asians were all slightly lower in 2003 than they had been in 1995, falling approximately 2.5, 5.5 and 10.8 percentage points over the period respectively, although White attendance rates were relatively stable over the period, down 1.4 percentage points from 1995 to 2003.

Finally, Figure 22 presents school attendance rates amongst disabled individuals between the ages of seven and 15 years and between 16 and 18 years of age between 1995 and 2003. Attendance rates in 2003 for both age-groups appear to have fallen since 1995. Amongst seven to 15 year olds, the attendance rate has fallen from 92.1 per cent to 68.5 per cent between 1995 and 2003, while that of 16 to 18 year olds has declined from 80.4 per cent to 52.7 per cent. Unfortunately, closer investigation of attendance rates of disabled individuals by race or province is made treacherous by the relatively small number of individuals in the sample.

**Figure 22: School Attendance Rates Amongst the Disabled, 1995-2003**

Source: OHS 1995, OHS 1999, Census 2001, GHS 2003 (Statistics South Africa).

Notes: 1. The questions regarding disability are not standardised across questionnaires, affecting comparability over time, as discussed in section 3.2b. Further, possible disability types vary from survey to survey. For example, the OHS 1995 allows five types of disability, namely sight, hearing or speech, physical, mental or multiple disabilities. The OHS 1999 allows individuals to choose sight, hearing, communication, movement, standing, grasping, intellectual, emotional, multiple or other disabilities. Census 2001 and the GHS 2003 allow sight, hearing, communication, physical, intellectual, emotional or multiple disabilities, with the GHS 2003 also allowing for 'other' disabilities.

In summary, therefore, there have been both positive and negative developments within the education system as far as is indicated by attendance rates. Amongst the very young, aged under seven years, attendance at pre-schools, crèches and daycare centres rose very slightly. However, the evidence suggests that the overall rate of increase is biased by the dominance of Africans, whose attendance rates barely changed between 1995 and 1999, within the age-group, since increases for Coloureds, Asians and Whites were fairly substantial. Hopefully, this means that a greater proportion of children will be relatively accustomed to a school environment when they start grade 1.

As far as attendance in the GET and FET phases is concerned, it was found that although attendance rates were high amongst seven to 15 year olds (97 per cent), approximately 320 000 children in this age-group, for whom school attendance is compulsory, did not attend school. On the positive side, school attendance rates amongst this age-group were relatively constant across both race and gender in 2003. However, there was a marked decline in attendance rates once learners were no longer required by law to attend school. The decline is particularly noticeable amongst Coloureds and, to a lesser extent, Asians. Furthermore, it is at this level that a gap appears in the attendance rates of males and females. In terms of higher education, the decline in participation rates amongst Africans and the stagnant and low participation rates amongst Coloureds are cause for concern, particularly when contrasted with the relatively high and rising rates amongst Asians and Whites. In the case of Coloureds, participation rates were likely hampered by low attendance rates amongst 16 to 18 year olds. Finally, it appears that education policy may have impacted on age-appropriate attendance in grade 12, while the proportion of appropriately-aged children in grade 6 and grade 9 appears to have risen back to 1995 levels.

### **iii. Characteristics of Educational Institutions**

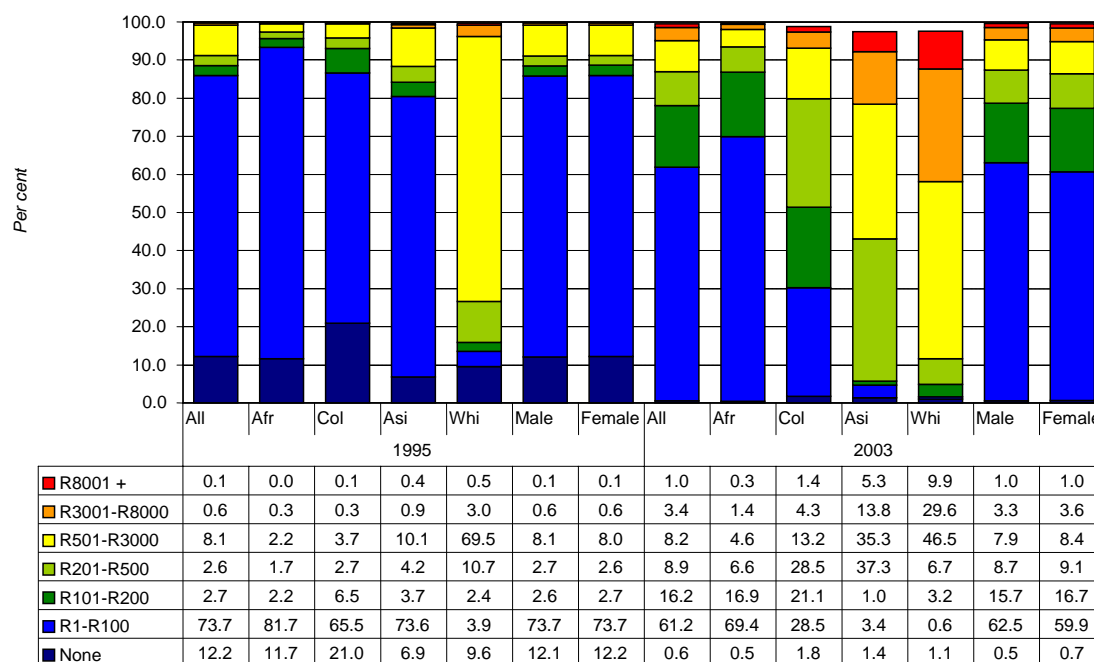
This section presents an overview of some of the characteristics of educational institutions and of some of the interactions between them and those that attend them. Indicators that are investigated



here include institution fees, school feeding schemes, problems experienced at schools and reasons for not accessing educational institutions.

The 1995 October Household Survey and the 2003 General Household Survey are the only surveys used that ask, on an individual level, about school fees for those attending educational institutions. In Figure 23, the distribution of school learners between the ages of seven and 18 years across various fee brackets is presented for 1995 and 2003. In 2003, almost 62 per cent of learners are reported to have spent no more than R100 per year on school fees. A further 16.2 per cent paid no more than R200 annually. Fewer than five per cent of all learners in this age-group paid more than R3 000 per year for school fees. However, this represents a substantially different pattern from that of 1995, where almost 86 per cent of learners paid no more than R100 in school fees, while less than one per cent of learners in this age-group paid more than R3 000 in fees.

**Figure 23: Distribution of Annual School Fees, by Race, 2003**



Source: OHS 1995, GHS 2003 (Statistics South Africa).

While there was little difference in the distribution by gender in each year, there were substantial differences across race groups. In 1995, the vast majority of African (93.4 per cent), Coloured (86.6 per cent) and Asian (80.5 per cent) learners reported paying no more than R100 in school fees in the previous 12 month period. In contrast, 69.5 per cent of White learners paid school fees of between R501 and R3 000 in the previous 12 months, while a further 10.7 per cent paid fees of between R201 and R500. The drop between 1995 and 2003 in the proportion of learners paying no more than R100 in school fees occurred in all race groups, though it was particularly acute for Coloured and Asian learners. By 2003, 69.9 per cent of African learners paid no more than R100 in school fees (representing a decline of 23.5 percentage points), while this was true of only 30.3 per cent of Coloured learners (a fall of 56.3 percentage points) and a mere 4.7 per cent of Asian learners (a fall of 75.7percentage points).

Nevertheless, in 2003, the vast majority of African and Coloured learners required no more than R500 in school fees annually (86.8 per cent and 79.9 per cent respectively), compared to 43.1 per cent of Asians and 11.6 per cent of Whites. At the top end of the scale, close to 40 per cent of White learners had to pay school fees in excess of R3 000, as did 19.1 per cent of Asian learners. However, less than two per cent of Africans and less than six per cent of Coloureds were required to pay more than R3 000 annually in school fees.

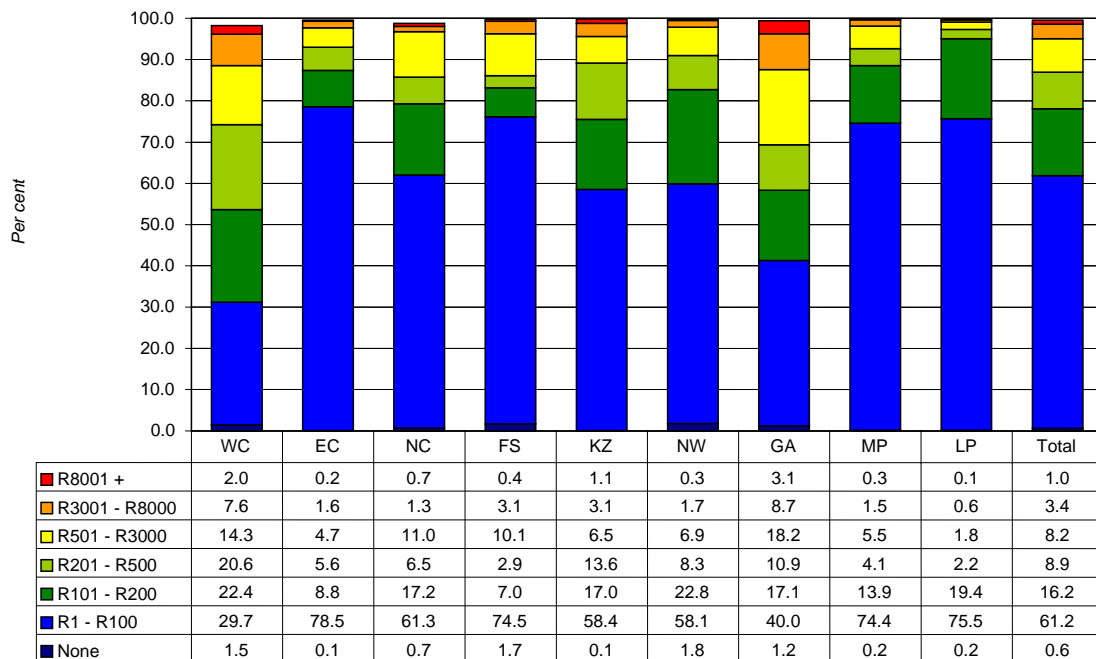
These distributions do not distinguish between state schools and private schools, but if high school fees are taken as a proxy for private schools and 'model C' schools, then it is clear that African and Coloured children are substantially less likely to be able to access these schools due to their lower



average household income levels. This holds even if one accepts that some of the children in poorer households may report low school fees, even though they attend schools with high school fees, due to the school fee exemptions they may receive at these schools. The large increase over the period in the proportion of learners paying fees of over R3 000 across all race groups, points to the growth in popularity of private schools as well as the relatively rapid increase in school fees at former 'model C' schools in particular, as school governing bodies seek to bridge the financial gap that changing subsidies have created.

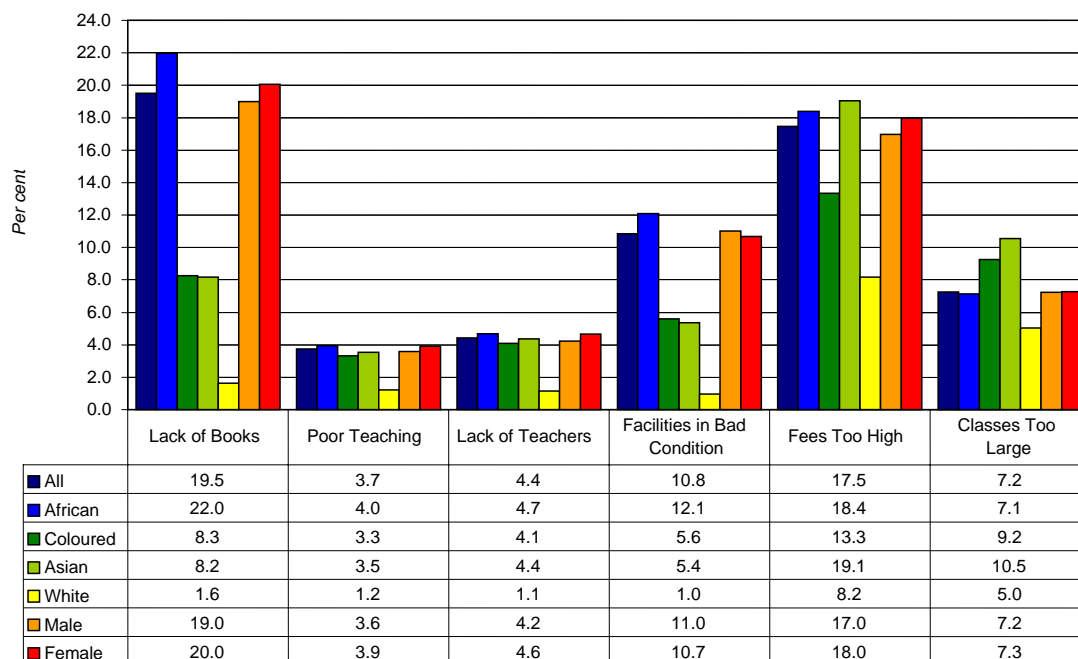
The racial patterns observed here provide some insight into the provincial patterns presented in Figure 24 below, as do provincial poverty statistics. The Western Cape and Gauteng appear to be the provinces where school fees were highest: 31.2 per cent and 41.3 per cent of learners respectively required up to R100 annually for school fees, while the proportions that were required to pay more than R3 000 per annum were 9.7 per cent and 11.8 per cent respectively. In contrast, in the Eastern Cape, Free State and Limpopo, between three-quarters and four-fifths of learners paid up to R100 in school fees annually. Therefore, poorer provinces had more children in schools with low school fees, relative to better-off provinces. Finally, education was free in terms of school fees for just 0.6 per cent of learners between the ages of seven and 18 years, representing fewer than 74 000 children.

**Figure 24: Provincial Distributions of Annual School Fees, 2003**



Source: GHS 2003 (Statistics South Africa).

The 2003 GHS also provides some insight as to problems surrounding schools and surrounding individuals' continued education. Specifically, the survey elicits the views of those currently attending educational institutions as to the problems experienced at these institutions. Six problems are listed, namely a lack of books, poor teaching, a lack of teachers, poor condition of facilities, high fees and class sizes that are too large. In Figure 25, the proportions of school learners between the ages of seven and 18 years who report each of these six problems are presented according to their race and gender.

**Figure 25: Problems Experienced at School by 7-18 Year Olds, 2003**

Source: GHS 2003 (Statistics South Africa).

The figure reveals three important problem areas. One-fifth of learners reported a lack of books, 17.5 per cent reported that school fees were too high, while 10.8 per cent cited the poor condition of facilities to be a problem. Relatively few learners regarded quality of teaching (3.7 per cent), quantity of teachers (4.4 per cent) or class sizes (7.2 per cent) as problematic. The issue surrounding schools lacking books is not a new one, and receives considerable media attention particularly at the start of each new school year. Despite this attention, a large number of learners experienced problems with the quantity of books in the preceding 12 months. It would seem that this is an area that requires urgent attention and further investigation. Particularly, it would be useful to ascertain to what extent this problem refers to schools not receiving their supply of books on time at the beginning of the academic year, as opposed to schools running out of books towards the end of the year. In the latter case, there may be issues surrounding the efficient use of books by learners (not wasting space) that, if addressed, may alleviate the problem.

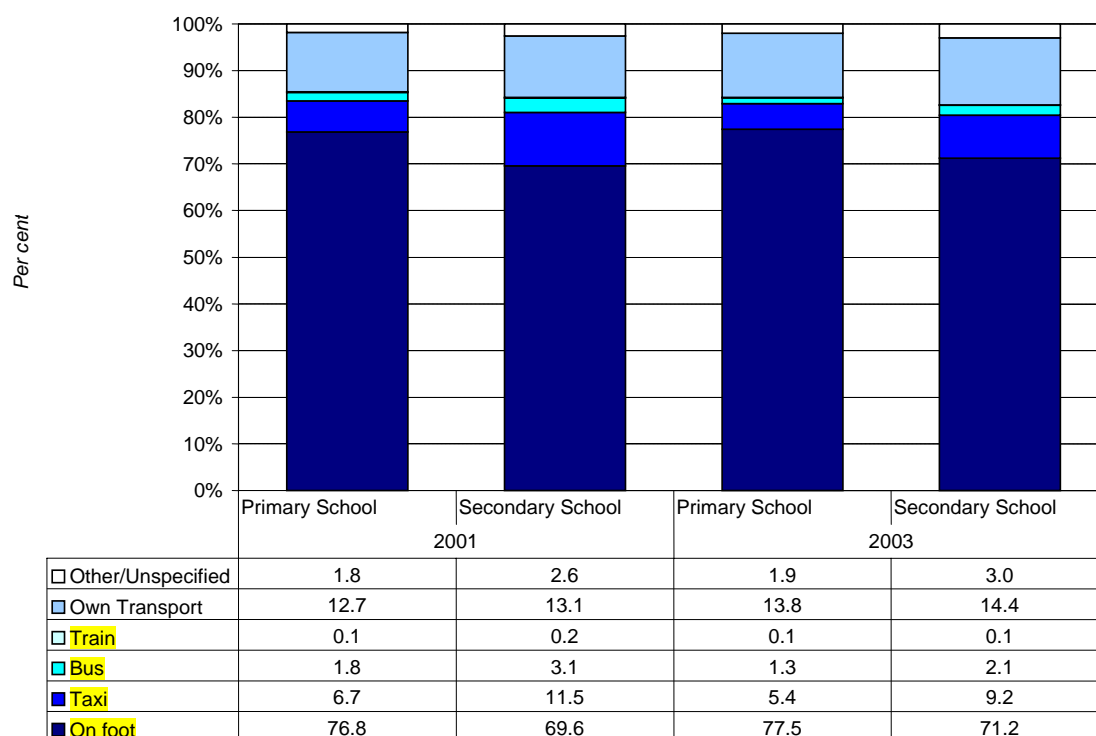
The issue regarding school fees is also quite interesting. Earlier it was shown that around 62 per cent of learners in this age-group were required to pay no more than R100 annually in school fees while a further 16.2 per cent paid between R101 and R200 annually. Thus, just over one-fifth of learners paid more than R200 per year. However, 17.5 per cent of learners reported school fees to be too high. Unfortunately, it is not possible to separate private and government schools as it is possible that learners at these different types of schools may respond differently. Further, it is not certain that enumerators made it clear that the issue revolved around actual fees as opposed to other costs.

It is clear that African learners are generally significantly more often exposed to problems at school than learners from any other race group. For example, 22.0 per cent of African learners experienced a lack of books at school; this was true of just over eight per cent of Coloured and Asian learners and a mere 1.6 per cent of White learners. A similar pattern was found for those who reported that school facilities were in poor condition and, except for Asians, for those who reported having problems with high school fees. Although the proportions who found poor teaching and a lack of teachers to be a problem were relatively low, relatively more Africans reported this problem than other race groups. The issue that African learners were least sensitive to relative to other races was class size. Only 7.1 per cent of Africans reported that their classes were too large, compared to 9.2 per cent of Coloureds and 10.5 per cent of Asians. However, this may simply reveal differing sensitivities to class sizes, particularly in the context of the equalisation of pupil-teacher ratios that has raised class sizes for Whites and probably Asians and Coloureds, and possibly lowered African class sizes.

#### iv. Transport to Educational Institutions

Figure 26 presents data on the various modes of transport households use to primary and secondary school in 2001 and in 2003. The most common mode of transport to both primary and secondary schools was to travel by foot. In 76.8 per cent of households in 2001, children walked to primary school while children in 69.6 per cent of households walked to secondary school. These fractions had barely changed by 2003, with 77.5 per cent and 71.2 per cent of households reporting that children in the household walked to primary and secondary school respectively.

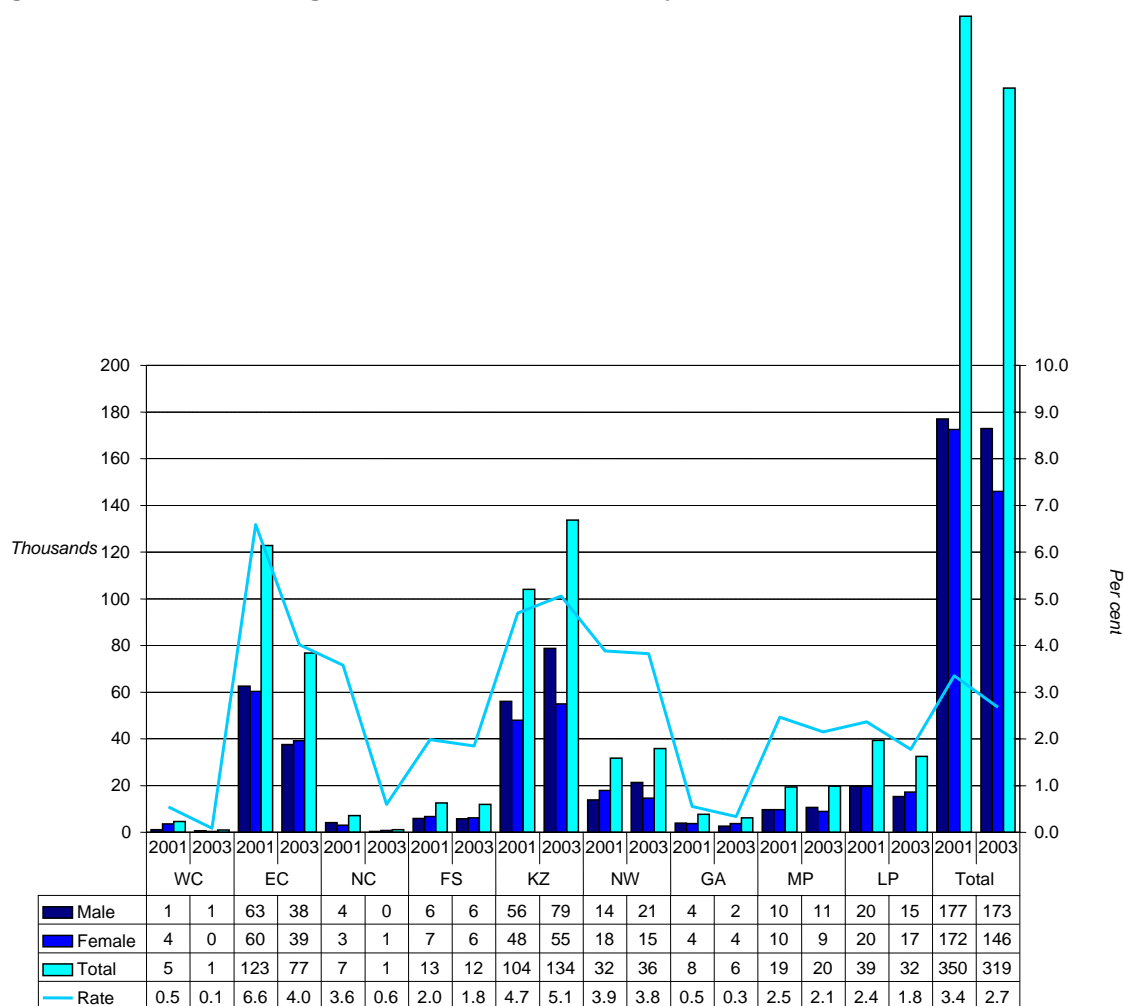
**Figure 26: Households' Mode of Transport to Primary and Secondary Schools, 2001 & 2003**



Source: LFS 2001, LFS 2003 (Statistics South Africa).

The next most popular mode of transport to school was provided by the household itself. In 2001, approximately 13 per cent of households transported their children to school, rising marginally to just over 14 per cent in 2003. Relatively few households reported trains or buses to be the main mode of transport to schools for their members. Taxis were also an important mode of transport to schools, particularly to secondary schools. In 2003, taxis were the main mode of transport to primary schools for 5.4 per cent of households, compared to 9.2 per cent for secondary schools. Here, a similar pattern is found for transport by taxi and transport by bus: households were evidently less willing to allow younger children to commute via public transport. On the other hand, though, this may also be a result of geographical distance to primary and secondary schools, with primary schools generally closer to more households than secondary schools.

As has been seen, many children across South Africa walk to school. While this may, in many instances, be seen as beneficial to children, walking excessively long distances has a decidedly negative impact on children's education and, more generally, their standard of living. Consequently, children who have to walk more than five kilometres to school have been identified as a key concern for the Department of Education. Figure 27 presents the provincial and gender analysis of the number of children who walked more than five kilometres to school in 2001 and 2003.

**Figure 27: Learners Walking More Than 5km to School, by Gender, 2001 & 2003**

Source: LFS 2001, LFS 2003 (Statistics South Africa).

Nationally, it appears that efforts to locate schools nearer learners lowered the number of seven to 18 year old children who walked more than five kilometres to school from 350 000 to 319 000 between 2001 and 2003. This reduction was most notable amongst girls, the number of girls walking more than five kilometres falling by around 26 000 to 146 000 in 2003, while there was a negligible change in the number of boys walking this distance (173 000 in 2003). The smaller number of children also translated into a decline in the proportion of all learners, falling from 3.4 per cent to 2.7 per cent over the period. This may be a result of more access to transport, closer location of schools to homes, or squatting or boarding nearer school than before. This needs further detailed study in the affected provinces.

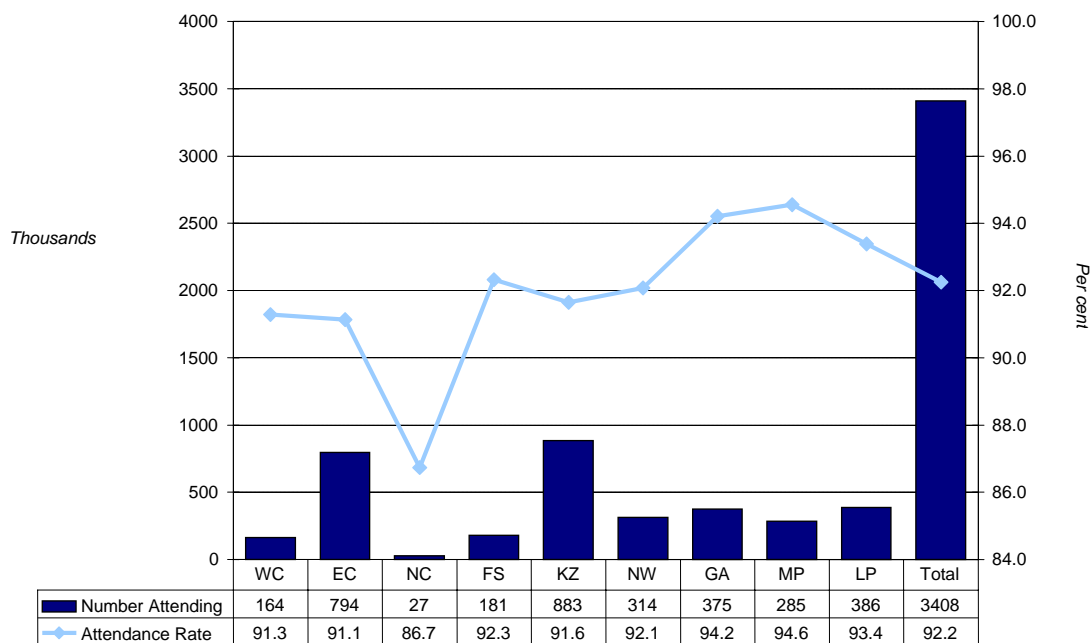
Provincially, the largest numbers of children walking more than five kilometres to school were to be found in the Eastern Cape (77 000) and KwaZulu-Natal (134 000). Between 2001 and 2003, though, the fortunes of these two provinces were divergent. In the Eastern Cape, significant progress was made, with the number of children walking excessive distances to school falling by about 46 000. This translates into a decline in the proportion of all learners from 6.6 per cent to 4.0 per cent over the period. In KwaZulu-Natal, however, 5.1 per cent of learners walked more than five kilometres to school, equivalent to 134 000 children. Both the number of affected children and the proportion of learners rose over the period, the former by 30 000 children and the latter by 0.4 percentage points. The only other province to report a rise in the number of children walking more than five kilometres to school was the North West (36 000 in 2003, although the increase was very small). However, in three provinces less than one per cent of learners walked excessive distances to school, while a further two had rates between one and two per cent.

### v. Nutrition and School Feeding Schemes

High levels of poverty in South Africa mean that many children across the country experience hunger on a regular basis. From an education perspective, learners who do not have enough to eat on a regular basis are less able to learn and perform poorly relative to their peers. The national school feeding scheme aims to ensure that the poorest learners have at least one meal per day, improving school attendance and performance amongst these learners. Information on the proportion of children experiencing hunger on a regular basis is an important requirement needed to inform the feeding scheme policy, serving to highlight the changing needs for school feeding schemes across the country.

Figure 28 shows a provincial analysis of school attendance amongst those learners between the ages of seven and 18 years who experienced hunger on a regular basis in 2003 and uncovers variations in these children's school attendance rates. In total, 92.2 per cent of seven to 18 year olds regularly experiencing hunger attended school, equivalent to around 3.4 million children.

**Figure 28: School Attendance of Seven to 17 Year Olds Who Regularly Experience Hunger, by Province, 2003**

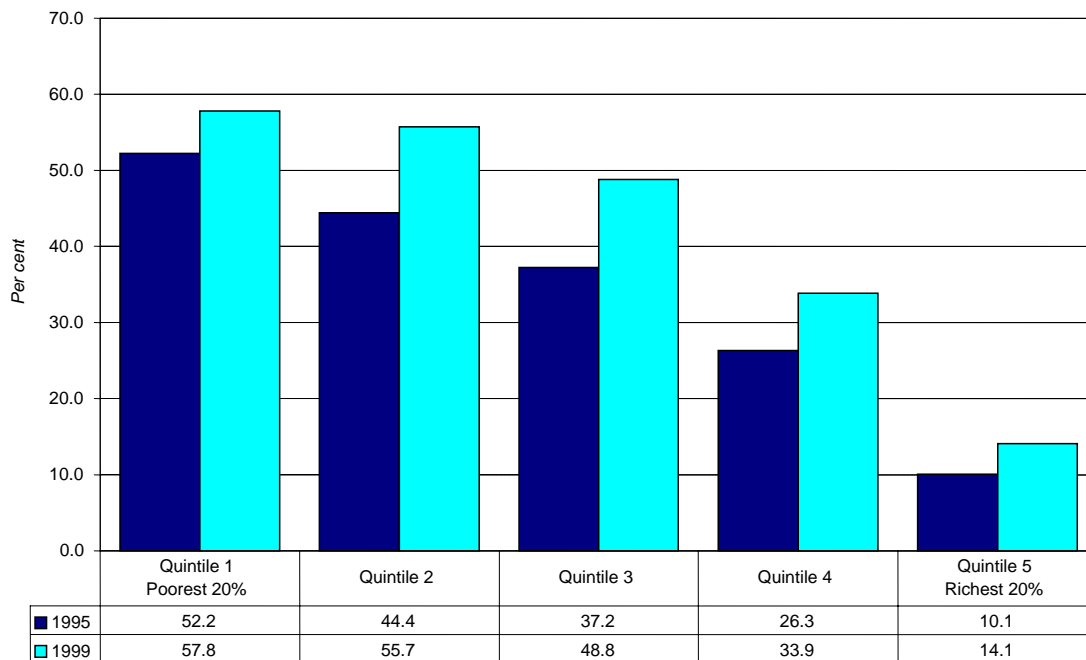


Source: GHS 2003 (Statistics South Africa).

- Note: 1. Learners are deemed to regularly experience hunger if they are members of households who indicated that children always, often or sometimes go hungry.
2. This question was asked only of children younger than 17 years of age, hence the age-group investigated in this figure is seven to 17 years and not 18 years as is generally the case in this study.

Children aged seven to 18 years who regularly experience hunger were slightly more likely to not attend school than other children, with attendance rates of 92.2 per cent compared to 93.5 per cent overall. On a provincial basis, the lowest attendance rate of hungry children was to be found in the Northern Cape. However, at an attendance rate of 86.7 per cent, this represented only 27 000 learners. In both the Eastern Cape and KwaZulu-Natal, a substantial number of hungry children went to school. To be precise, there were around 794 000 learners in the Eastern Cape and 883 000 learners in KwaZulu-Natal whose households were unable to always feed them.

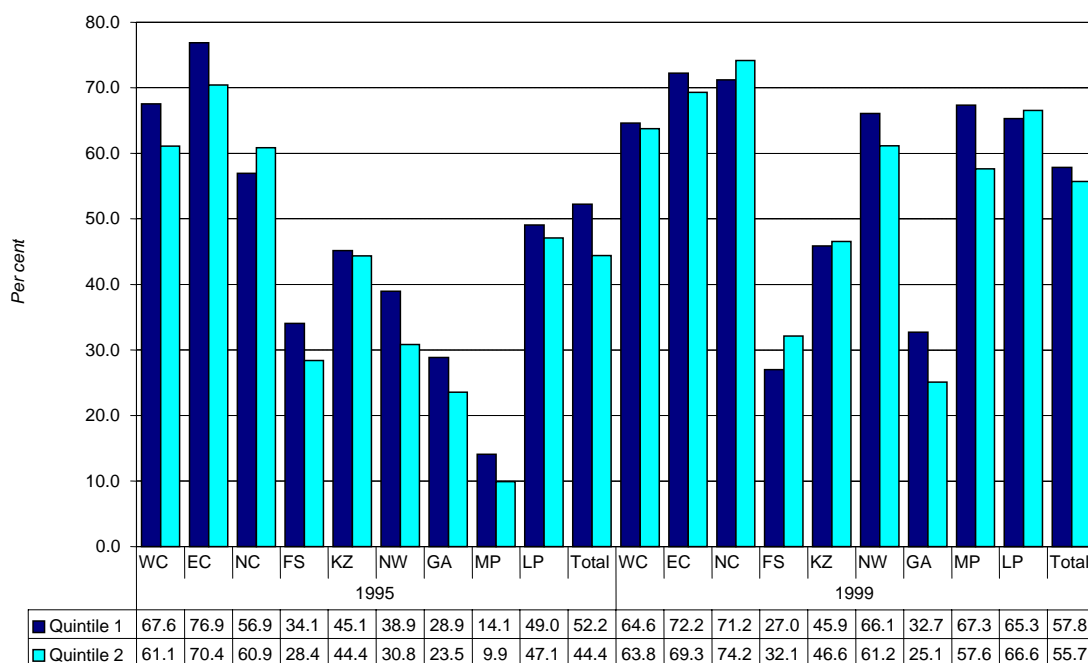
An important issue surrounding the school feeding scheme policy is one of targeting. In other words, since the policy is specifically intended for poorer learners, it is important that poorer learners are the main beneficiaries. Figure 29 below presents learners' access to the school feeding scheme for 1995 and 1999, grouping learners according to the expenditure quintile in which their household is classified (unfortunately there are no data on this in the LFSs or the GHSs for 2001 or 2003). In 1995, 41 per cent of all learners were benefiting from the school feeding scheme.

**Figure 29: Access to School Feeding Scheme by National Household Expenditure Quintile, 1995 & 1999**

Source: OHS 1995, OHS 1999 (Statistics South Africa).

Access to the school feeding scheme was relatively well targeted in that learners in the poorer quintiles (quintile one being the poorest and quintile five the richest) were more likely to benefit from the scheme than other learners. However, according to the data, access rates were only 52.2 per cent and 44.4 per cent for the poorest two quintiles respectively in 1995. At the other end of the distribution, 10.1 per cent of learners in the top quintile and 26.3 per cent of those in quintile four also benefited from the scheme. This may indicate a problem of inadequate targeting, and closer inspection by the authorities concerned is needed to ensure that this is not the case. Between 1995 and 1999, access rates increased for learners in all quintiles, reflecting the extension of the scheme, with the overall access rate rising by almost one-quarter to 50.8 per cent. This increase was particularly large in quintiles two and three, with access rates rising more than 11 percentage points for both quintiles to 55.7 per cent and 48.8 per cent of learners respectively in 1999. However, increasing access rates amongst learners from better-off households indicate that in 1999 there was still a problem in terms of targeting, although learners in quintiles four and five represented 9.4 per cent of beneficiaries of the scheme in 1999, down from 10.8 per cent in 1995.

In terms of provincial performance regarding targeting in 1995, three provinces stood out in their ability to reach high proportions of learners from the poorest households (Figure 30). The Eastern Cape reached 76.9 per cent of learners in the poorest quintile and 70.4 per cent of learners in quintile two. In the Western Cape the proportions of learners in these two quintiles who accessed the school feeding scheme were 67.6 per cent and 61.1 per cent respectively, while in the Northern Cape they were 56.9 per cent and 60.9 per cent respectively. The Northern Cape was also the only province where quintile two learners accessed the school feeding scheme more often than quintile one learners. The lowest access rates were to be found in Mpumalanga (14.1 per cent of quintile one learners and 9.9 per cent of quintile two learners), Gauteng (28.9 per cent and 23.5 per cent respectively) and the Free State (34.1 per cent and 28.4 per cent respectively).

**Figure 30: Access to School Feeding Scheme for Two Poorest National Household Expenditure Quintiles, by Province, 1995 & 1999**

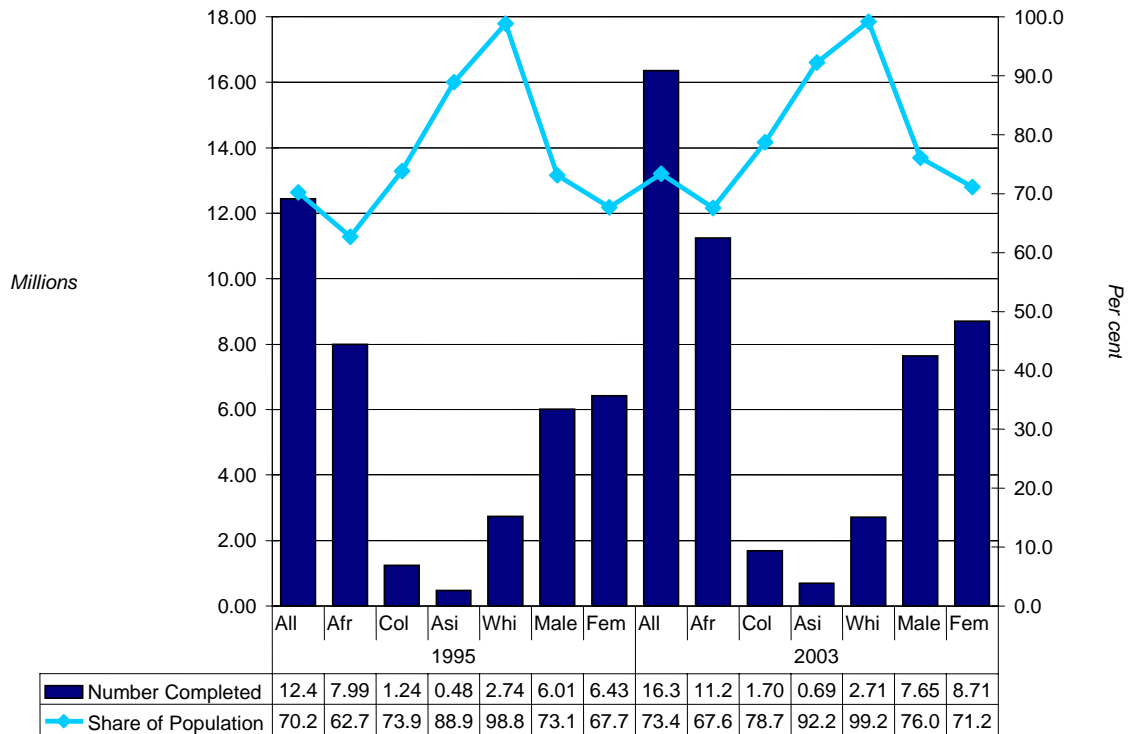
Source: OHS 1995, OHS 1999 (Statistics South Africa).

By 1999, access rates had generally improved, although the performances of the Western and Eastern Cape provinces had weakened slightly. Substantial improvements were recorded in Mpumalanga, Limpopo, and North West, to the extent that access rates in these provinces were comparable to those of the three Cape provinces. Access was highest in the Northern Cape, where 71.2 per cent of learners in the poorest quintile and 74.2 per cent of learners in the second poorest quintile benefited from school feeding schemes. Unfortunately, the period saw relatively little progress in KwaZulu-Natal and Gauteng, with access rates in the Free State for quintile one actually declining by seven percentage points. Like the Northern Cape in 1995 and 1999, three other provinces had higher access rates amongst quintile two learners than amongst quintile one learners, namely the Free State, KwaZulu-Natal and Limpopo, although these differences were very small and unlikely to be significant.

## **b. General Education and Training**

### **i. Grades 6 and 9 Completion Rates**

The General Education and Training (GET) phase encompasses grades 1 through 9 and is the minimum amount of education that is legally required of learners. Grades 6 and 9 are two of the key grades in which learners' abilities are monitored as part of the systemic evaluation of the education system (the others being grades 3 and 12). The completion of a grade 6 level of education means that the individual should have the ability to read and write, and some basic algebraic skills. Figure 31 provides information on grade 6 completion rates for the adult population as a whole, as well as by race and gender, for 1995 and 2003. In 1995, just over 70 per cent or 12.4 million individuals over the age of 25 years had completed at least grade 6. By 2003, this had risen to 16.3 million individuals or 73.4 per cent of this section of the population.

**Figure 31: Individuals Over 25 Years Completing Grade 6, by Race and Gender, 1995 & 2003**

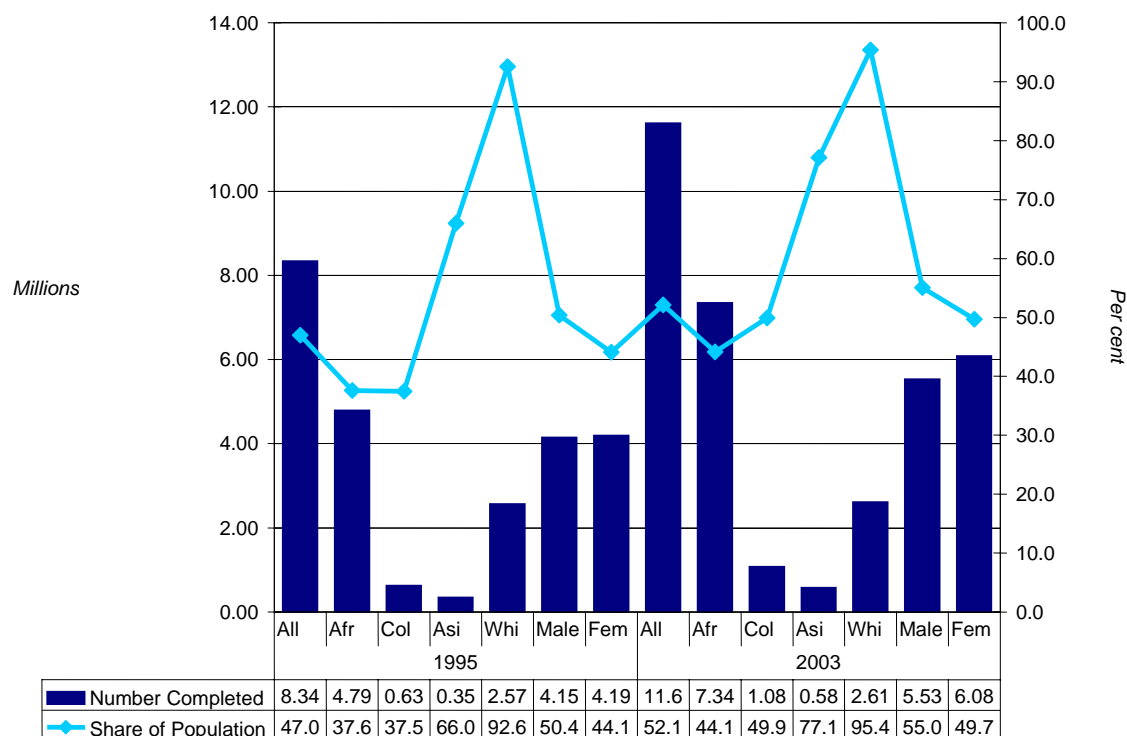
Source: OHS 1995, LFS 2003 (Statistics South Africa).

The proportion of the population over 25 years of age who had completed grade 6 increased during the period for all race groups. The number of Africans who had completed at least grade 6 rose from 7.9 million in 1995 to 11.2 million in 2003, accounting for more than two-thirds of the African population in this age-group. The improvements for the Coloured and Asian populations were also notable. In 2003, 78.7 per cent of Coloureds and 92.2 per cent of Asians had completed grade 6. Completion of grade 6 was almost universal amongst Whites in both 1995 and 2003.

Although the number of women who completed at least grade 6 was greater than that of men, differences in population size meant that the completion rate amongst men, at 76.0 per cent in 2003, was almost five percentage points higher than that of women, at 71.2 per cent. The proportion of men completing grade 6 increased by around three percentage points over the period while that of women increased by 3.5 percentage points. The increase in the share of women completing grade 6 was slightly greater than for men, providing some indication that improvements had been made with regard to access to basic education irrespective of gender.

Grade 9 marks the completion of the compulsory GET phase, after which learners are no longer legally bound to attend school. Approximately 52.1 per cent of South African adults over 25 years of age had completed grade 9 in 2003 (Figure 32), representing a five percentage point increase relative to 1995. This increase in the proportion of adults with at least grade 9 represents an increase of approximately three million people to 11.6 million people by 2003.



**Figure 32: Individuals Over 25 Years Completing Grade 9, by Race and Gender, 1995 & 2003**

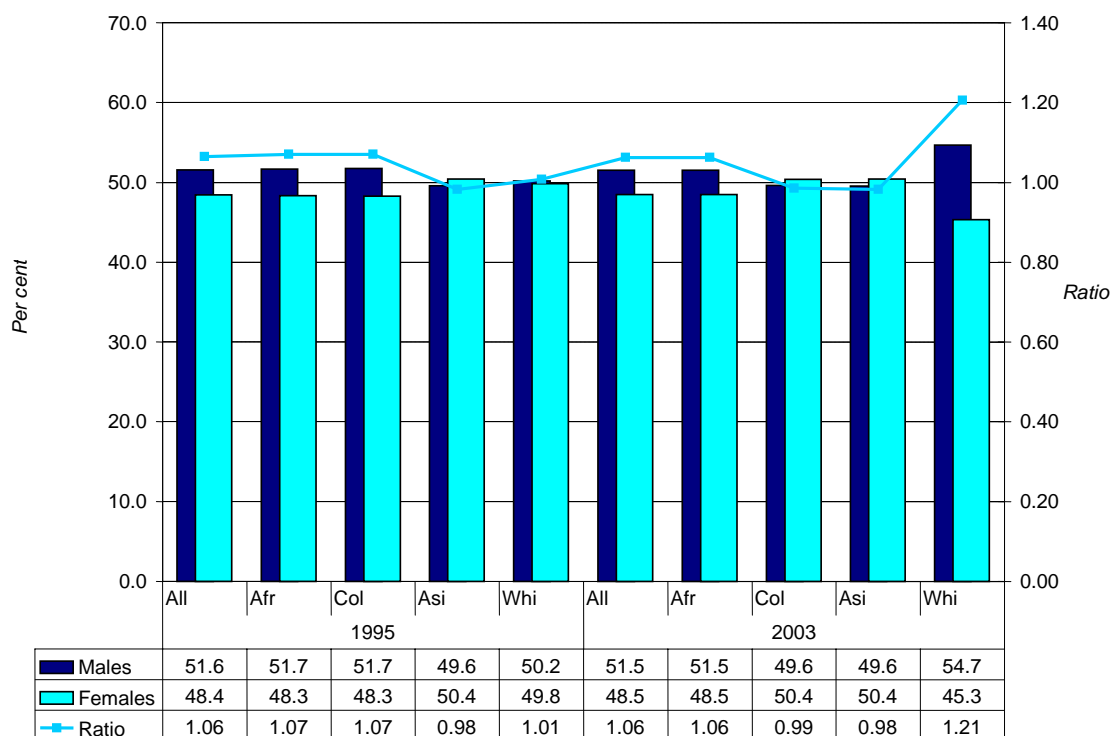
Source: OHS 1995, LFS 2003 (Statistics South Africa).

As was the case for grade 6 completion figures, the number of Africans who had completed the GET phase rose from almost 4.8 million in 1995 to 7.3 million in 2003, representing a rise of 2.5 million individuals. Completion rates amongst Africans consequently rose by more than six percentage points to 44.1 per cent in 2003, still the lowest rate for any of the race groups. Completion rates amongst Coloureds jumped more than 12 percentage points from 37.5 per cent in 1995 (level with those of Africans) to just under 50 per cent. Similarly, the Asian completion rate rose from 66.0 per cent to 77.1 per cent. Almost all Whites over the age of 25 years had completed the GET phase, the proportion rising from 92.6 per cent in 1995 to 95.4 per cent in 2003.

In terms of gender, the absolute number of women completing the GET phase of education surpassed that of men in both years. However, once again, females' greater adult population meant that the completion rate was lower for females than males. In 1995, the completion rate amongst males was 50.4 per cent compared to 44.1 per cent for females, while in 2003, the respective completion rates were 55.0 per cent and 49.7 per cent. The gap between males and females was only slightly larger for grade 9 completion rates than for grade 6 completion rates, with the number of women having completed grade 9 surging by almost two million (4.19 million to 6.08 million), compared to an approximate growth of under 1.4 million amongst men.

## ii. Gender Ratio in Primary Education

The gender breakdown of learners in the primary education system was relatively even (Figure 33). Boys slightly outnumbered girls and accounted for 51.6 per cent of primary school learners although, as seen earlier, attendance rates were virtually identical for boys and girls. Thus, in 1995, boys outnumbered girls in primary education by around 106 to 100. This ratio remained virtually unchanged over the period up to 2003.

**Figure 33: Gender Composition of Primary School Learners, by Race and Gender, 1995 & 2003**

Source: OHS 1995, LFS 2003 (Statistics South Africa).

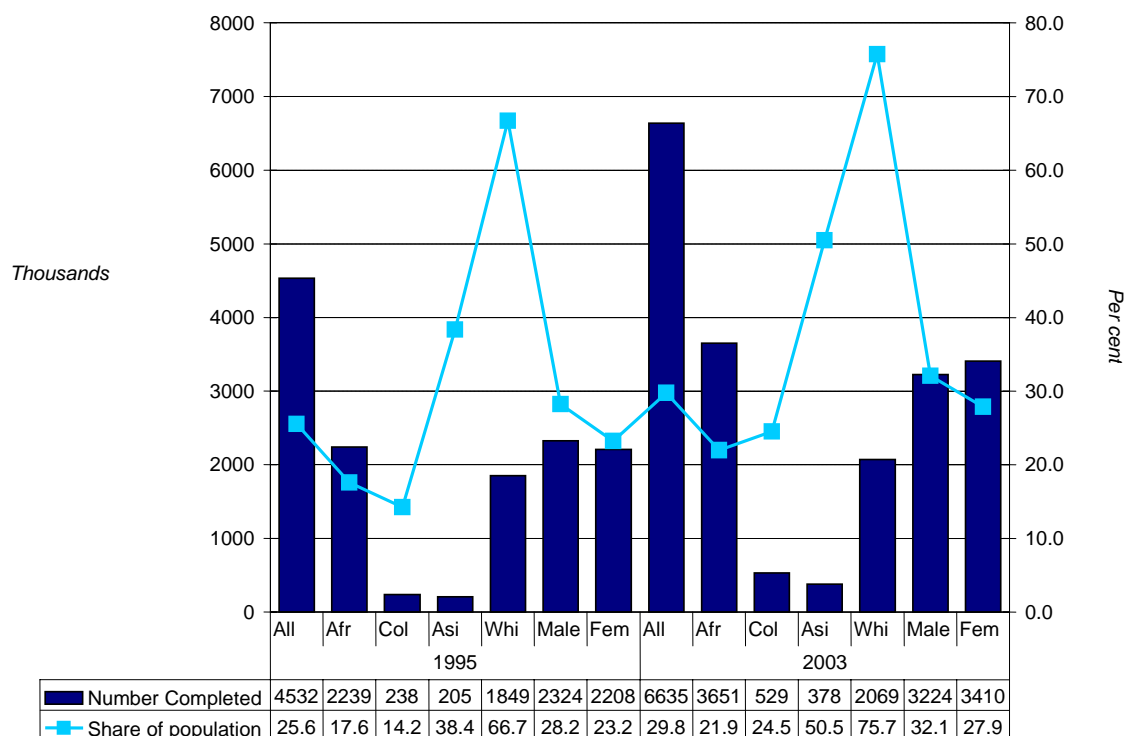
Notes: 1. Primary school learners, as is the case with secondary school learners, cannot be directly identified from the surveys. Primary school learners are, therefore, all children aged seven to 13 years, who have indicated they are currently attending an educational institution and who indicated that they had either no education or an incomplete primary education. Thus, any children who indicated that they had completed Grade 7 or higher were excluded.

Within individual race groups, in 1995 there were more boys attending school than girls for all races except Asians. Amongst Africans and Coloureds, there were 107 boys for every 100 girls attending primary school, while for Whites, the gender ratio was 101 to 100 in favour of boys. Amongst Asians, though, there were 98 boys attending primary school for every 100 girls. By 2003 the gender ratio, which remained constant amongst the Asian population, had swung in favour of girls amongst Coloureds, with 99 boys for every 100 girls. Interestingly, amongst the White population, the relatively equal split in male and female attendance in 1995 changed dramatically in 2003, when the share of boys attending primary rose to 54.7 per cent and for girls it declined to 45.3 per cent. There seems no apparent reason for this shift, but it was clearly related to changes in three provinces, namely Mpumalanga, Limpopo and the Western Cape, although the change in the Western Cape was most significant due to the size of the population there. These changes may have been related to the sample and should perhaps be tested against official Department of Education data.

### c. Further Education and Training

The Further Education and Training (FET) phase includes grades 10, 11 and 12, the final three years of school education, culminating in the Senior Certificate examinations. Completion of grade 12 is a necessary, though not sufficient, condition to continue with tertiary education, and the proportion of people with matric certificates is often used as an indicator of the general educational level of the population. Further, completion of the FET phase is often viewed as an important requirement to obtain work.

In Figure 34, the numbers and proportions of adults over the age of 25 years who had completed grade 12 are presented. The number of people in possession of a matriculation certificate increased by more than two million, from 4.5 million in 1995 to 6.6 million in 2003. At the same time, the proportion of the population who had matriculated increased by more than four percentage points to just under 30 per cent.

**Figure 34: Individuals Over 25 Years Completing Grade 12, by Race and Gender, 1995 & 2003**

Source: OHS 1995, LFS 2003 (Statistics South Africa).

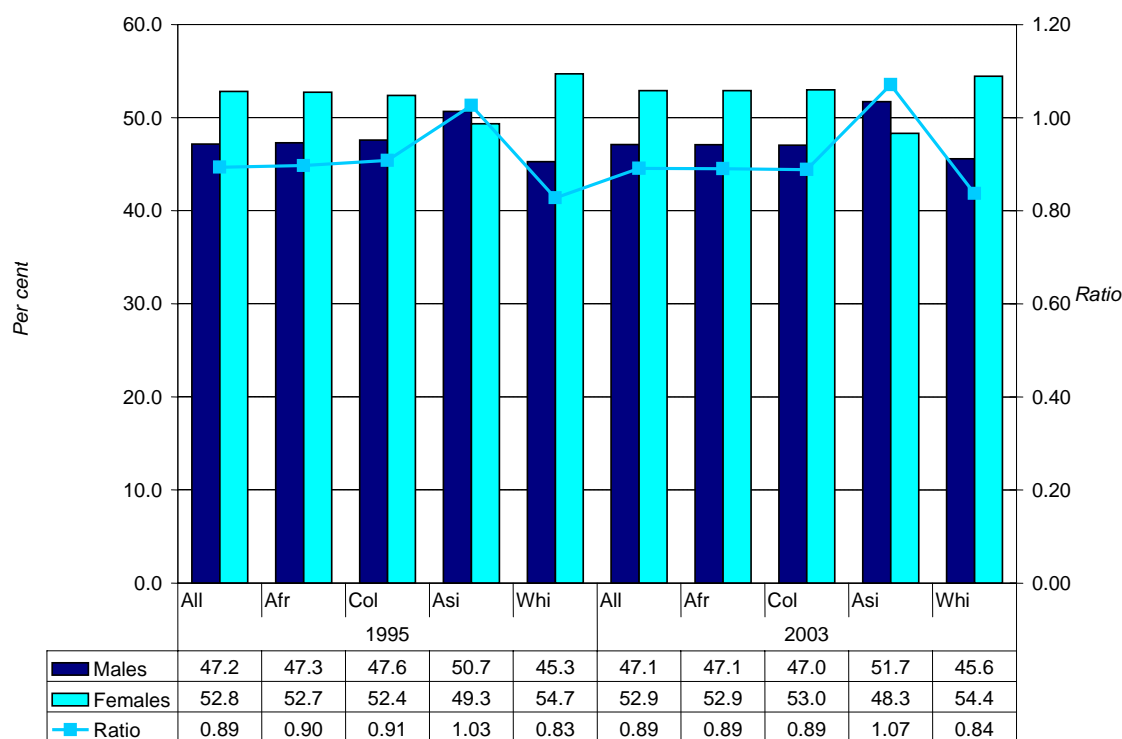
Much of the growth in the number of matriculants occurred amongst Africans. The number of Africans over the age of 25 who had completed grade 12 increased by approximately 1.5 million, representing three-quarters of the total increase. However, this resulted in a modest four percentage point rise, to 21.9 per cent, in the share of the African population who had completed matric. The growth in the share of the population who completed grade 12 is much more marked for the other race groups. For Coloureds, the share of the population in possession of a matriculation certificate increased by a remarkable ten percentage points between 1995 and 2003, to 24.5 per cent. The growth in matriculants was more pronounced amongst the Asian population, who saw a 12 percentage point increase in the proportion of the population who completed grade 12 during the period. Thus in 2003, just over half of the Asian population had obtained a matriculation certificate. The share of Whites who completed grade 12 far surpassed that for any other race group. Two in every three Whites had completed grade 12 in 1995, and in 2003, close to three-quarters of Whites over the age of 24 had obtained a matriculation certificate.

In 1995, there were larger numbers of males in possession of a matriculation certificate than females. In addition, in 1995 the proportion of men who had completed grade 12 was 28.2 per cent, compared to only 23.2 per cent for women. In 2003, there were still proportionately more men who had completed grade 12 than women, but the growth in the share of the population who had completed matric was much greater for women than it was for men. Thus, in 2003, the actual number of women who had matriculated outnumbered that of men. The increasing proportion of women completing grade 12 seems a clear indication of South African society's changing attitudes towards women's education.

Consequently, although the overall proportion of the adult population in possession of a matric certificate has increased during the post-apartheid era, the increase has not been evenly distributed across races. Despite substantial growth in the number of African matriculants, this was a relatively small increase relative to population growth. Furthermore, the gap between Africans and Coloureds on the one hand and Asians and Whites on the other hand actually widened. In 1995, the proportion of White adults with matric certificates was approximately 49 percentage points higher than that of African adults. By 2003, this gap had increased to close to 54 percentage points. These differences

hold important labour market and poverty and inequality implications for South Africa. At least in terms of gender, the picture is more positive, with the gender gap closing slightly from around five percentage points in 1995 to 4.2 percentage points in 2003.

**Figure 35: Gender Composition of Secondary School Learners, by Race, 1995 & 2003**



Source: OHS 1995, LFS 2003 (Statistics South Africa).

According to the national household survey data, females outnumbered males in the secondary education system (Figure 35). Females accounted for between 54 per cent and 55 per cent of secondary school learners in both years, indicating no change in school attendance behaviour over the period. As a result, male learners were outnumbered by their female counterparts by approximately 89 to 100. The proportion of female learners attending school was larger than that of male learners for all race groups, except for Asians. Between 1995 and 2003, the proportion of Asian males to females in the secondary education system increased slightly to 107 male learners per 100 female learners. The largest gender gap during the period was found amongst White learners. In 2003, the proportion of White male secondary school learners was 45.6 per cent, compared to 54.4 per cent female. The gender gap within African and Coloured learners remained stable at approximately 47 per cent to 53 per cent.

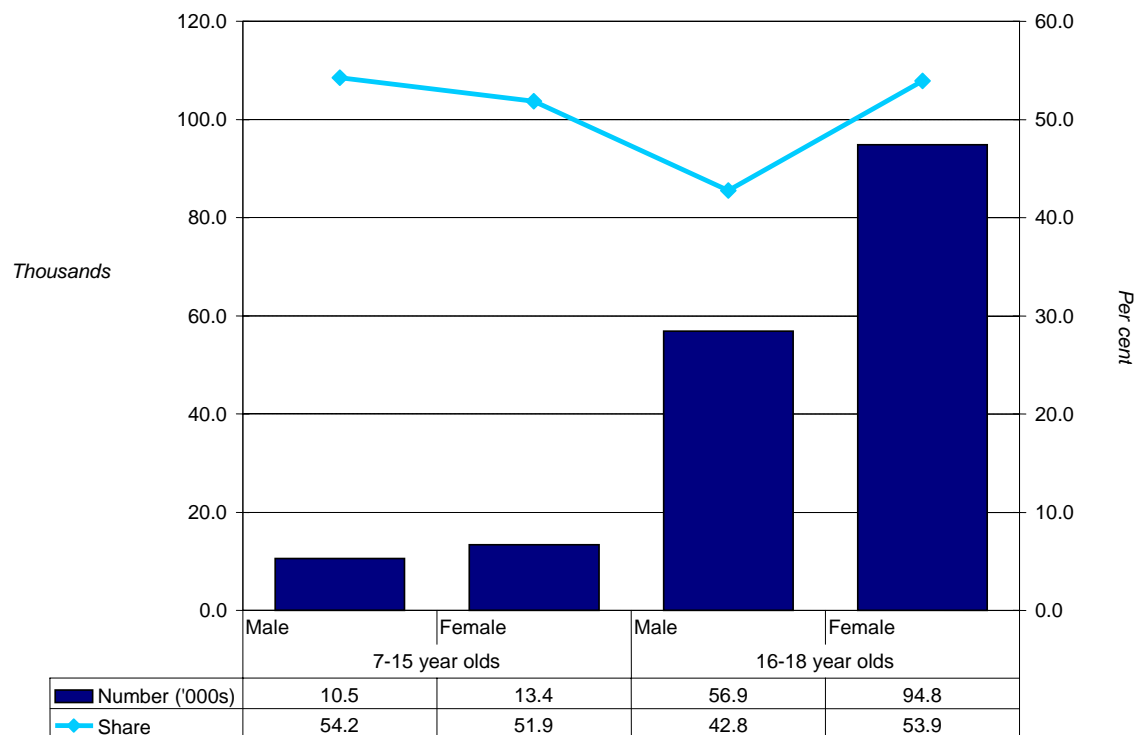
#### **d. Out of School Youth**

The issue of children who leave the education system is a key concern for the Department of Education and of critical importance in the process of upgrading skills and educational levels across South African society. Of those between the ages of seven and 18 years who do not attend school, the national household surveys ask whether they wish to continue their education and what are the reasons for them not continuing their education.

The number of individuals involved is not negligible. In 1995, approximately 45 000 individuals between seven and 15 years of age and 309 000 between 16 and 18 years of age were not attending an educational institution. Of these, 24 000 seven to 15 year olds and 152 000 16 to 18 year olds wanted to continue their educations (Figure 36). The number of 16 to 18 year olds wishing to continue education was substantially larger than the number of seven to 15 year olds wanting to continue with their education, although this was not unexpected as substantially fewer seven to 15 year olds are not

attending an educational institution compared to 16 to 18 year olds. However, although the actual number of out-of-school seven to 15 year olds who wanted to continue education was relatively small, more than half (52.9 per cent) of those out of school wanted to be in school. The share of 7 to 15 year old males wishing to continue with education was marginally higher than the share of females who wanted to be in school. This indicates that the majority of children in this group were not attending school due to necessity and not by choice. In 1995, amongst the 16 to 18 year olds, there were approximately 57 000 males and 95 000 females wishing to continue with their education. This represented 42.8 per cent of out-of-school males and 53.9 per cent of out-of-school females who wanted to continue their education. Here, again, some tentative inferences can be made regarding why learners leave school. Amongst 16 to 18 year old males, it seems to be more often by choice than it is amongst females in this age-group, indicating the need for older males to join the labour market instead of studying.

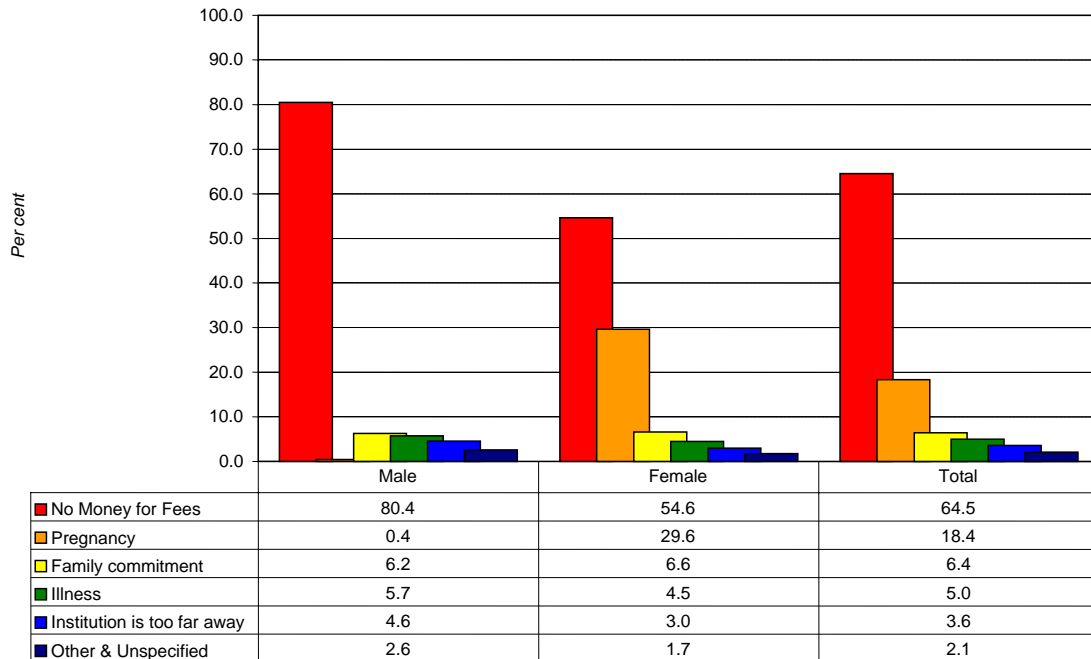
**Figure 36: Out-of-School Youth Wishing to Continue Education, by Gender, 1995**



Source: OHS 1995 (Statistics South Africa).

National household surveys do provide some insight into the reasons why these individuals do not attend educational institutions. One question from the OHS 1995 (question 2.17) asks individuals whether they would like to continue their education, but only if they are between the ages of 15 and 24 years, have not obtained matric and do not attend school. The question then asks why those who wish to continue their education do not do so. In the GHS 2003, all household members who currently do not attend an educational institution are asked why they do not attend (questions 1.11 and 1.12). Consequently, these questions are not strictly comparable, although both provide useful insight into the problem of out-of-school youth.

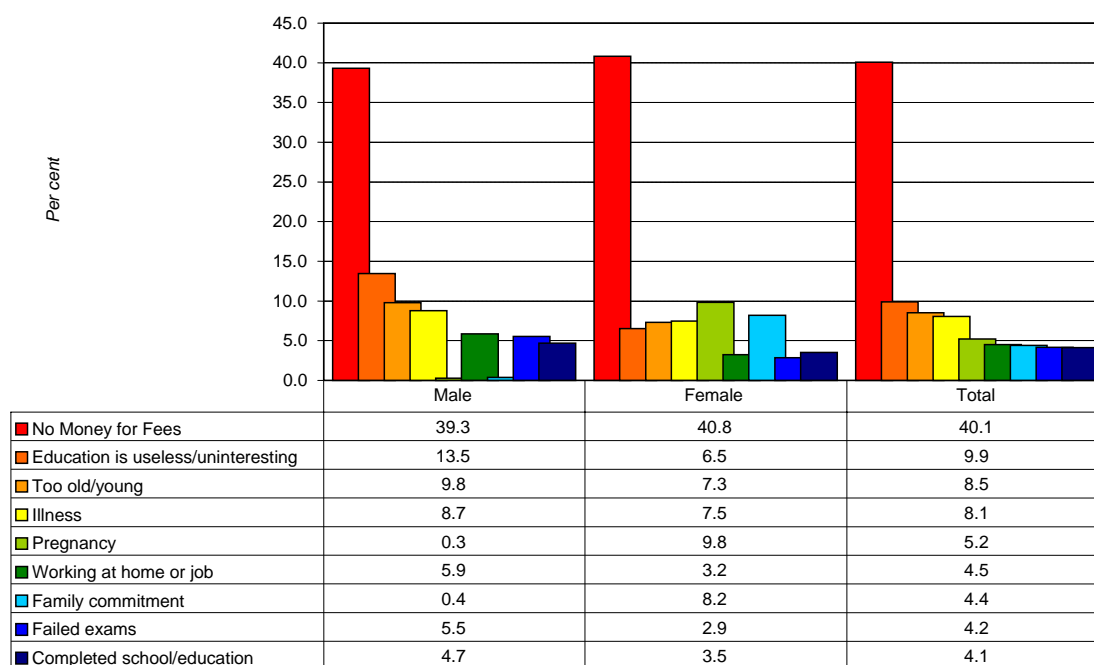
Figure 37 presents the main reasons preventing 15 to 18 year olds who had not completed matric and who were not attending school from continuing their education. It is very clear that the main constraint facing these individuals was a financial one: nearly two-thirds (64.5 per cent) indicated that they did not have enough money to continue their educations. Amongst males, the rate was significantly higher at four-fifths compared to 54.6 per cent of females. The second most important reason overall was pregnancy. Nearly three in ten females in this group responded that pregnancy prevented their continued education. Other reasons, including family commitment, illness and distance, in descending order of importance, accounted for the remaining 17 per cent of respondents.

**Figure 37: Reasons for Not Continuing Education, Non-Matriculated 15 to 18 Year Olds, 1995**

Source: OHS 1995 (Statistics South Africa).

Unfortunately, this question does not fully assess the situation. It omits children under the age of 15 years who, although they are legally obligated to attend school, indicated that they attend no educational institution. As seen above, there were approximately 45 000 children who fell into this category. Further, the question does not require an individual to answer if he or she has completed grade 12. Although there is nothing wrong with this *per se*, it means that no information can be gleaned from the survey about why individuals are not attending higher education institutions, which is an important gap given the labour market trends prevalent in the South African economy. Finally, the question is only asked of those who wish to continue their education.

These issues are addressed to a large extent by the 2003 GHS, which asks why individuals are currently not attending an educational institution irrespective of whether or not they actually want to continue their educations. In this survey, the only 'hurdle' that needs to be cleared in order to be asked this question is that the individual is currently not attending an educational institution, and the question specifies eleven possible answers, excluding the 'other' category. Similar to the responses obtained from the OHS 1995, by far the most common response (see Figure 38) was that there was insufficient money for fees (40.1 per cent of respondents). The issue surrounding fees was slightly more often cited as a problem by females than males (40.8 per cent vs. 39.3 per cent).

**Figure 38: Main Reason for Currently Not Attending an Educational Institution, 7 to 18 Year Olds, 2003**

Source: GHS 2003 (Statistics South Africa).

Three other reasons are cited by relatively high proportions of both males and females, namely that education was useless or uninteresting (9.9 per cent overall), that the individual was too old or too young (8.5 per cent) or that the individual was prevented by illness (8.1 per cent). The first reason is a rather disturbing one and rather clearly indicates a choice to not continue their educations. The gender difference here is marked, with 13.5 per cent of males feeling that education was useless or uninteresting compared to only 6.5 per cent of females. Over half (55.1 per cent) of these individuals were in possession of a matric certificate, however. It is also not clear whether individuals left school early *because* they felt education was useless or whether this opinion was formed after individuals left the education system and were prevented from entering it again. Nevertheless, the view that education is useless or uninteresting to the extent that individuals withdraw from the education system is worrying, particularly given labour market studies that find lower educated individuals are more often unemployed than other individuals (see, for example, Oosthuizen & Bhorat 2004), and education studies that find higher rates of return for higher levels of education (see, for example, Keswell and Poswell 2003). The reason of being too old or too young is perhaps not too relevant in this case, with most of those citing this as the reason for not currently attending an educational institution being aged seven years and therefore deemed by the parent or perhaps the school to be too young to start school (71 per cent).

Pregnancy is an important reason amongst females for not attending school, with one in ten reporting this to be their main reason for not attending. Females were also far more likely to not attend an educational institution due to family commitments, which included child-minding, than males (8.2 per cent vs. 0.4 per cent respectively).

Age-group disaggregations of the above figures are presented in Table 17 below, although the data from 1995 and 2003 may not be strictly comparable, particularly given the large jump in the number of respondents in the two age-groups over time. The very small number of respondents in the seven to 15 year age-group in 1995 means that very few deductions can be made, except for the fact that a lack of money was the major reason preventing children from attending school (75.1 per cent of respondents). Similarly, amongst 16 to 18 year olds not attending an educational institution, but wishing to do so, nearly two-thirds (62.9 per cent) were not able to do so due to a lack of money. Other important reasons included pregnancy (19.6 per cent) and family commitments (6.9 per cent).

**Table 17: Reasons Preventing Educational Attendance or Continued Education, 7 to 18 Year Olds, 1995 & 2003**

	Seven to 15 Year Olds				16 to 18 Year Olds			
	1995		2003		1995		2003	
	'000s	Share	'000s	Share	'000s	Share	'000s	Share
Too old/young			67	26.1			2	0.4
Completed school/education			2	0.7			32	5.7
Institution is too far away	1	2.8	13	5.0	6	3.7	19	3.4
No money for fees	18	75.1	94	36.7	95	62.9	232	41.7
Working at home or job			3	1.1			34	6.1
Education is useless/uninteresting			16	6.3			64	11.6
Illness	1	4.8	31	12.1	8	5.0	35	6.2
Pregnancy	3	10.4	3	1.0	30	19.6	40	7.1
Failed exams			5	2.0			29	5.1
Got married			0	0.0			12	2.2
Family commitment	1	3.8	3	1.1	10	6.9	33	6.0
Other & Unspecified	1	3.1	21	8.0	3	1.9	25	4.5
Total	24	100.0	257	100.0	152	100.0	556	100.0

Source: OHS 1995, GHS 2003 (Statistics South Africa).

Notes: 1. In 1995, this question was asked only of individuals between 15 and 24 years of age who were not in possession of a matric certificate and who were not attending school but who wanted to continue their education. Further, it allowed only the six options for which data are reported in the table. At the same time, the question asked respondents to identify the factor that prevented them from continuing their education, as opposed to the 2003 question which asks the reason why the respondent is currently not attending an educational institution, a subtle difference that may impact on comparability.

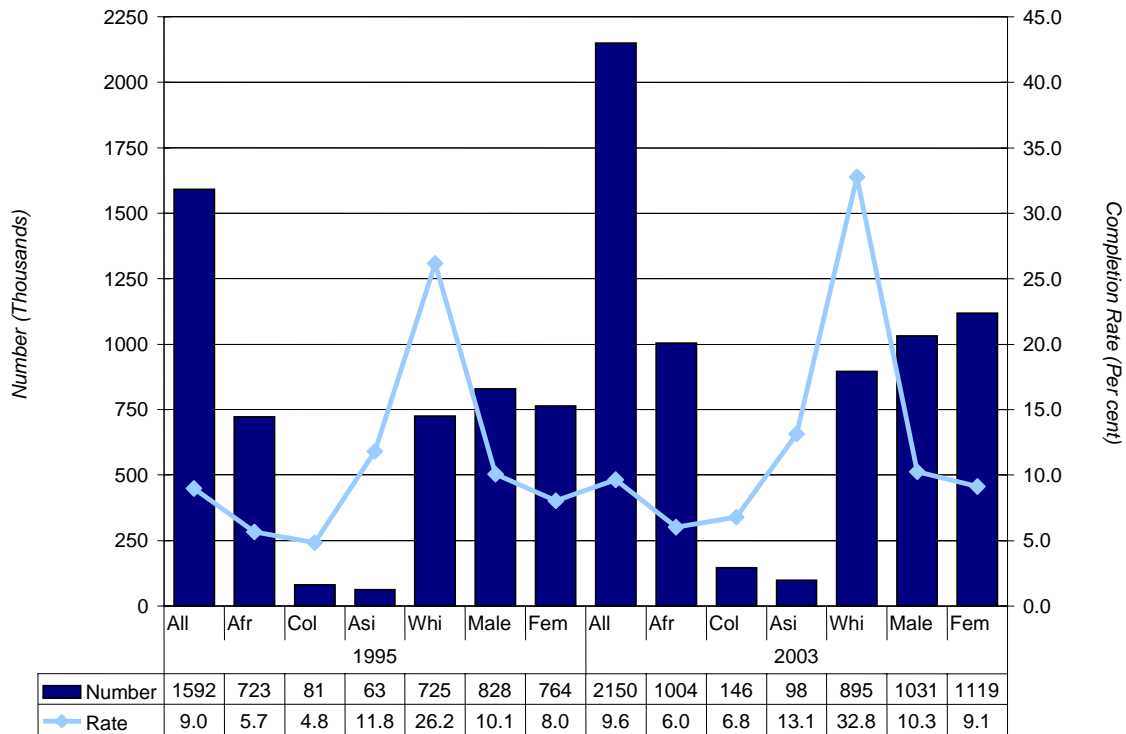
In 2003, the picture is slightly different, although broadly similar. The major reason for currently not attending school amongst seven to 15 year olds was insufficient money to pay fees (36.7 per cent), while 26.1 per cent indicated they were too young to attend school. A further 12.1 per cent were not attending school due to illness. Amongst 16 to 18 year olds, the dominant reason for not attending an educational institution was a lack of money (41.7 per cent), while 11.6 per cent of individuals in this age-group who were not attending school felt that education was useless or uninteresting. Other popular reasons were pregnancy (7.1 per cent), illness (6.2 per cent) and family commitment (6.0 per cent).

The over-riding picture that emerges from these figures is the important constraint on school attendance amongst seven to 18 year olds posed by a lack of money. This perhaps points to a need for greater state involvement in making education more affordable and accessible to poorer individuals.

### **e. Higher Education**

Completion of tertiary education greatly improves one's chances of successful employment. South Africa's high unemployment rate creates an environment that increases individuals' demand for tertiary education. Figure 39 shows the number of people aged 25 years or more who have completed tertiary education, as well as the share of the population that have a degree or diploma, in 1995 and 2003 for men and women.



**Figure 39: Tertiary Education Completion and Numbers, 1995 & 2003**

Source: OHS 1995, LFS 2003 (Statistics South Africa).

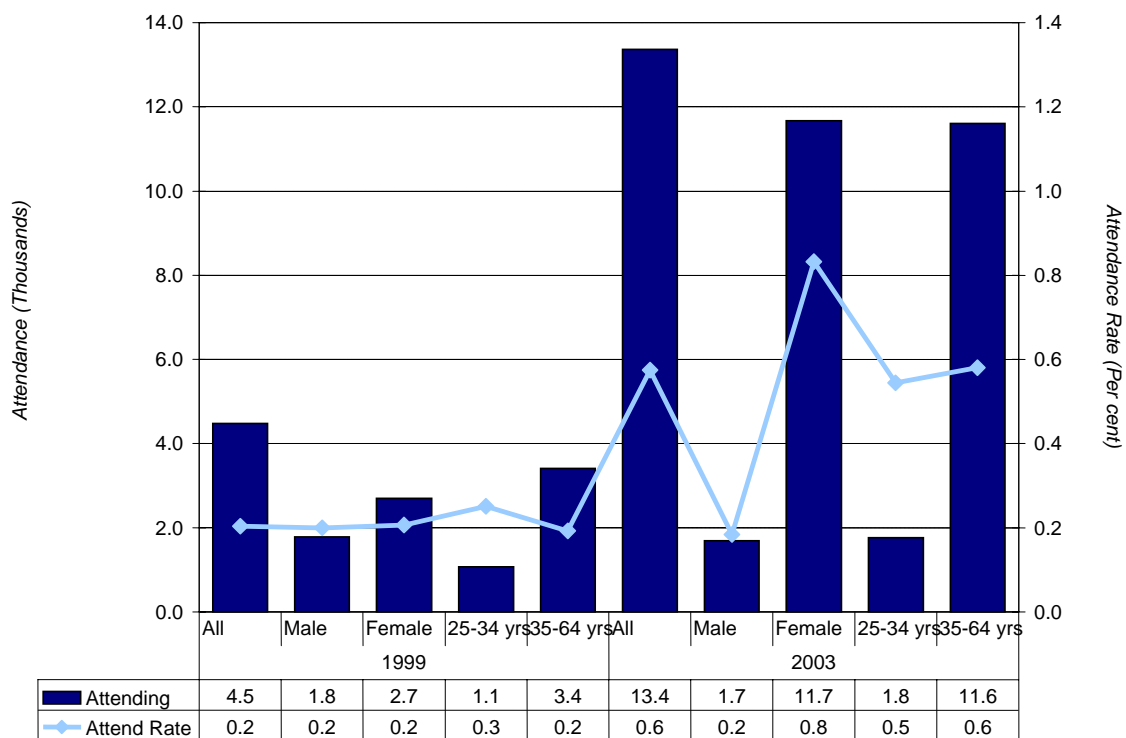
In 1995, almost 1.6 million people had completed some level of tertiary education, an equivalent of nine per cent of the population aged 25 years or more. Of this 1.6 million, the majority were either African or White. However, the share of the African population who have completed tertiary education amounts to only 5.7 per cent, whilst just over one quarter of their historically advantaged White counterparts held a degree or diploma. The Asian and Coloured population had 63 000 and 81 000 tertiary qualified individuals, respectively. But a greater share of Asians completed tertiary education as opposed to Coloureds. For all race groups, the share of individuals completing tertiary education increased in 2003 – a positive sign for the economy.

In addition, in 1995 there were a larger number of male graduates than there were females. By 2003, however, female graduates outnumbered male graduates, implying that during the period the growth of female graduates was faster than the growth of male graduates. This has positive implications for government's affirmative action policy, as the pool of tertiary qualified women continues to expand.

#### **f. Adult Basic Education**

Adult Basic Education and Training (ABET) programmes are aimed at educating those individuals older than 25 years who can neither read nor write and who are therefore illiterate. Figure 40 presents data on attendance of ABET programmes in 1999 and 2003. In 1999, of the 2.2 million illiterate adults, roughly 4 500 attended ABET programmes.<sup>6</sup> The minuscule number of people attending ABET programmes meant that a mere 0.2 per cent of the target group were being educated. Over the four-year period, the number of individuals attending ABET programmes increased dramatically from 4 500 to approximately 13 000. However, the attendance rate was marginally up to around 0.6 per cent.

<sup>6</sup> This figure, being less than 10 000, is technically too small to make meaningful inferences and consequently too much reliance should not be placed on most of the figures in this section.

**Figure 40: Attendance of Adult Basic Education and Training Programmes, 1999 & 2003 for people aged 25-64 year olds**

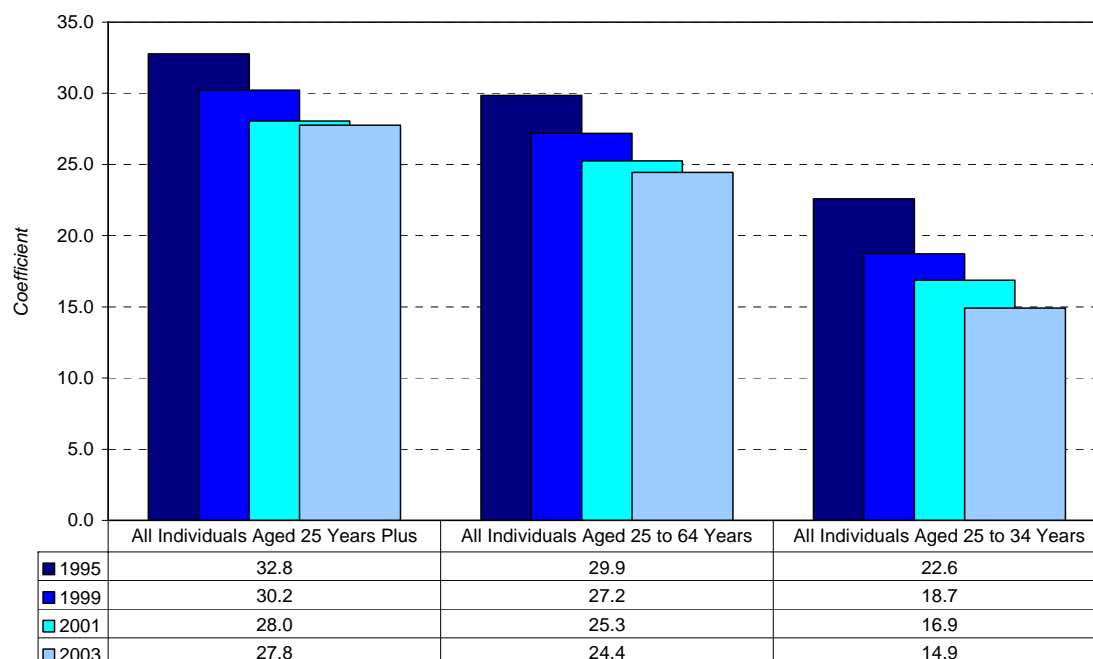
Source: OHS 1999, LFS 2003 (Statistics South Africa).

In both years, female attendance outnumbered male attendance and virtually all growth in attendance over the period occurred amongst females. It appears that it is mainly women in the older age cohort (35 to 64 years) who are attending ABET programmes. The increasing numbers of women attending ABET programmes in 2003 saw the attendance rate rise from 0.2 per cent in 1999 to an improved 0.8 per cent in 2003. There is much cause for concern as the attendance rates of ABET programmes remains below the one per cent level, in 2003.

### ***g. Educational Inequalities***

As has been seen in the preceding sections, there are often large differences in the various education indicators across race groups due to the discriminatory practices and policies implemented during the pre-1994 period. In an effort to gauge and monitor educational inequality, Gini coefficients based on years of education have been calculated for 1995, 1999, 2001 and 2003 (Figure 41). Although this is not a perfect measure, and years of education does not include any information on the quality of education, this measure does shed some light on educational inequality in South African society. The data on years of education is derived from educational attainment data and the coefficient therefore provides a rough estimate of inequalities in educational attainment, rather than in actual years spent in the education system. A Gini coefficient of zero represents a state of perfect equality (all individuals would have identical educational qualifications) while a coefficient of 100 indicates perfect inequality (all individuals, save one, have no education).

Gini coefficients were calculated for three age-groups, namely all individuals over the age of 25 years, all individuals between the ages of 25 and 64 years and all individuals aged 25 to 34 years, due to the inertia displayed in older age-groups. The age of 25 years is used as a lower bound since up to around this age, individuals are likely to still be building up their education levels. Thus, the first age-group mimics the total adult population, the second is reflective of the working-age population and the third provides an insight into the trends within the youngest generations.

**Figure 41: Years of Education Gini Coefficients, 1995-2003**

Source: OHS 1995, OHS 1999, LFS 2001 & LFS 2003 (Statistics South Africa).

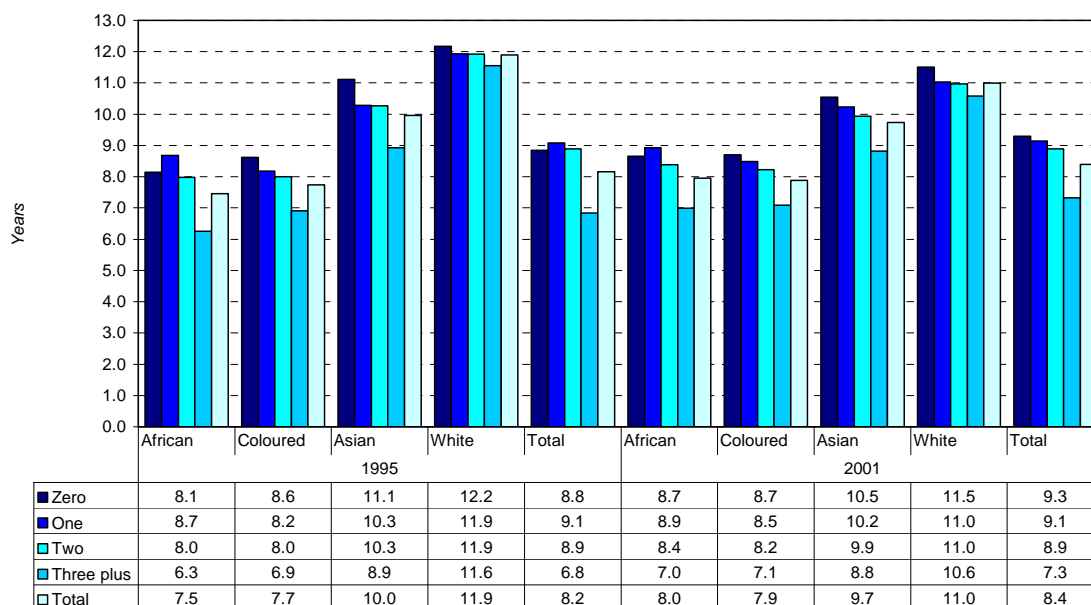
The trend since 1995 has been one of declining inequality in terms of educational attainment for all groups. Amongst all individuals aged 25 years of more, the Gini coefficient declined from 32.8 in 1995 to 27.8 in 2003, a decline of five points, although the rate of change seems to have slowed with very little difference between the 2001 and 2003 coefficients. There was a slightly larger decline in the Gini coefficient for the 25 to 64 year age-group, from 29.9 to 24.4. The largest decline, though, was amongst the youngest age-group, those between 25 and 34 years of age. The Gini coefficient declined by almost eight points over the period, from 22.6 in 1995 to 14.9 in 2003. The decline has also been relatively even at an average rate of approximately one point per year. These trends are clearly influenced by the surge in the number of individuals completing matric, where in the past many may have dropped out of school earlier.

## 4.2 EDUCATION AND DEMOGRAPHIC INTERACTIONS

### a. Demographic Interactions

The relationship between fertility and education is a complex one, but the general observation is that more highly educated women tend to have fewer children than their less educated counterparts. Amongst other reasons, this observation has led to greater importance being placed on the education of women, particularly in developing countries where fertility rates can be extremely high. Although not all of South Africa's nationally representative household surveys are able to provide information on this relationship (the module on births is not included in all surveys), it is possible to obtain data from the 1995 OHS and the 2001 Census. In Figure 42, the average years of women's education are compared for 25 to 50 year olds, according to their number of live births, by race for these two years.<sup>7</sup>

<sup>7</sup> The design of the questionnaire has meant that the data had to be delimited for comparability purposes. In 1995, all women under the age of 55 years were asked this question, while in 2001, only women between 12 and 50 years of age were asked. Further, for the reasons discussed above in terms of educational attainment, the lower age threshold used is 25 years. To ensure comparability, the figure is based on data on women between the ages of 25 and 50 years of age.

**Figure 42: Average Years of Education by Number of Live Births, 25-50 Year Olds, 1995 & 2001**

Source: OHS 1995, Census 2001 (Statistics South Africa).

In both 1995 and 2001, women with three or more births were on average less educated than women with fewer or no births. Women who had never given birth had an average of 8.8 years of education in 1995, compared to 6.8 years for those with three or more live births. At this time, women's years of education were relatively similar irrespective of the number of live births between zero and two. In 2001, years of education declined from 9.3 for those who had never given birth to 7.3 for those with three or more live births. The Census indicates that average years of education decline gradually as numbers of live births increase. Within the various race groups, this pattern is evident for all women. The decline in average years of education is steepest amongst African women, with those with zero live births having approximately 30 per cent more years of education than those with three or more live births in 1995. By 2001, this difference had fallen to 24 per cent. Amongst Coloureds, the difference in years of education between those with no live births and those with three or more fell from 25 per cent in 1995 to 23 per cent in 2001, while amongst Asians the difference declined from 25 per cent to 20 per cent respectively. However, for White South African women the difference in years of education is less pronounced and actually increased from five per cent to nine per cent over the period. A possible explanation underlying this difference between White and other women is that educational attainment amongst the White population is more equal than is the case for other race groups, with most White women at least completing their secondary education, thereby reducing educational inequality generally and narrowing the scope for differences according to numbers of live births. For women with zero live births, the average number of years of education completed rose from 8.8 years in 1995 to 9.3 years in 2001, reflecting the rising education levels particularly of younger women across all races.

**Table 18: Attendance at Educational Institutions by Age + Number of Live Births, 1995 & 2001**

		12-15 Year Olds			16-25 Year Olds		
Number of Live Births		Zero	One	Two+	Zero	One	Two+
1995	Attendance Rate (%)	97.1	58.3	-	64.5	29.7	13.6
	Total Number of Women ('000s)	1907.2	7.5	0.0	2985.2	880.3	336.2
2001	Attendance Rate (%)	94.6	60.5	74.5	60.6	24.9	12.6
	Total Number of Women ('000s)	1981.8	23.8	3.7	2815.2	1341.9	470.4

Source: OHS 1995, Census 2001 (Statistics South Africa).

Notes: 1. Totals of fewer than 10 000 are too small to allow credible conclusions.

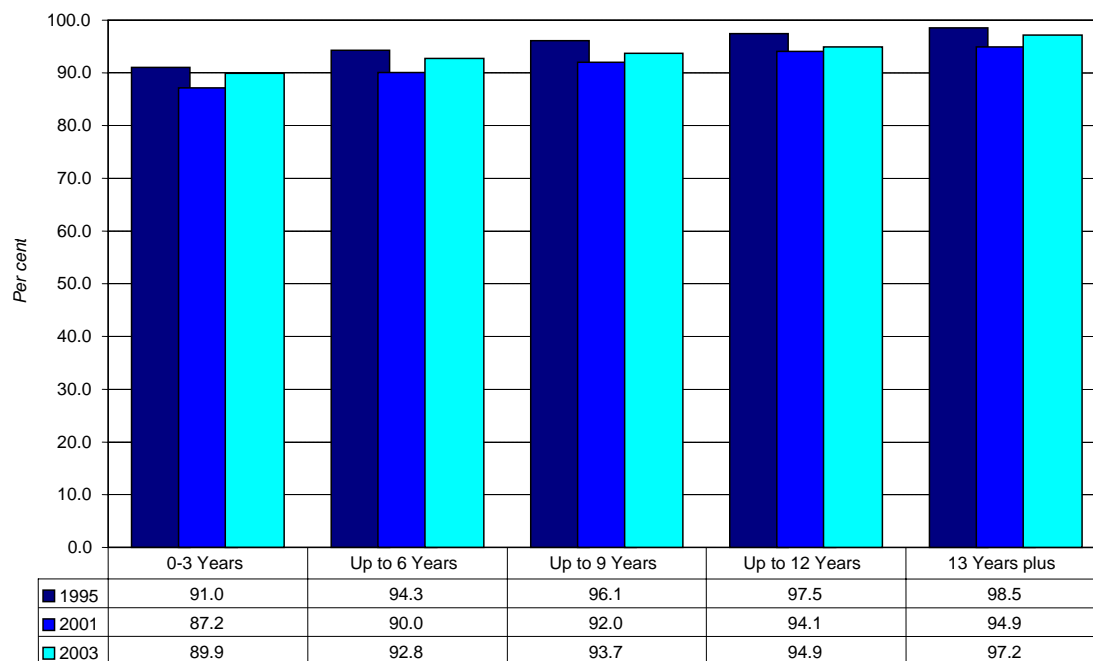
Having children does reduce the likelihood of attending an educational institution amongst females of school going age. Table 18 indicates that educational institution attendance rates were lower for females with one live birth than those with none and lowest for those with more than one live birth. In 1995, there were too few observations from which to draw conclusions for patterns amongst 12 to 15 year olds, although attendance rates amongst 16 to 18 year olds in 2001 declined from 87.8 per cent

for those females with no live births, to 29.7 per cent and 13.6 per cent of those females with one or two or more live births respectively. In 2001, with the significantly larger sample size of the 2001 Census dataset, this pattern is reconfirmed relatively unaltered for both 12 to 15 year olds and 16 to 18 year olds, although attendance rates for the former age-group were higher than for the latter irrespective of the number of live births.

### ***b. Household Interactions***

Parents play an important role in determining the educational outcomes of their children, and children's educational attainment is often similar to that of their parents. Popular belief dictates that as the average level of parents' education increases, so too will the school attendance rates of their children. This may be due to a number of reasons, including such things as better-educated parents placing a higher value on education for their children, encouraging them to stay in school, or having better-paying jobs, removing the necessity for children to contribute financially to the household, allowing parents to keep their children in school. This trend is clearly evident in Figure 43, which illustrates school attendance rates according to the *resident* parents' average years of education, for the years 1995, 2001, and 2003.

**Figure 43: School Attendance Rates according to Resident Parents' Average Years of Education, 1995-2003**



Source: OHS 1995, Census 2001, LFS 2003 (Statistics South Africa).

Notes: 1. Data for 1999 are unavailable.

2. Average years of education are calculated across resident parents, whether or not both parents are present in the household. Thus, if the father does not reside in the household, the average equals the mother's years of education.

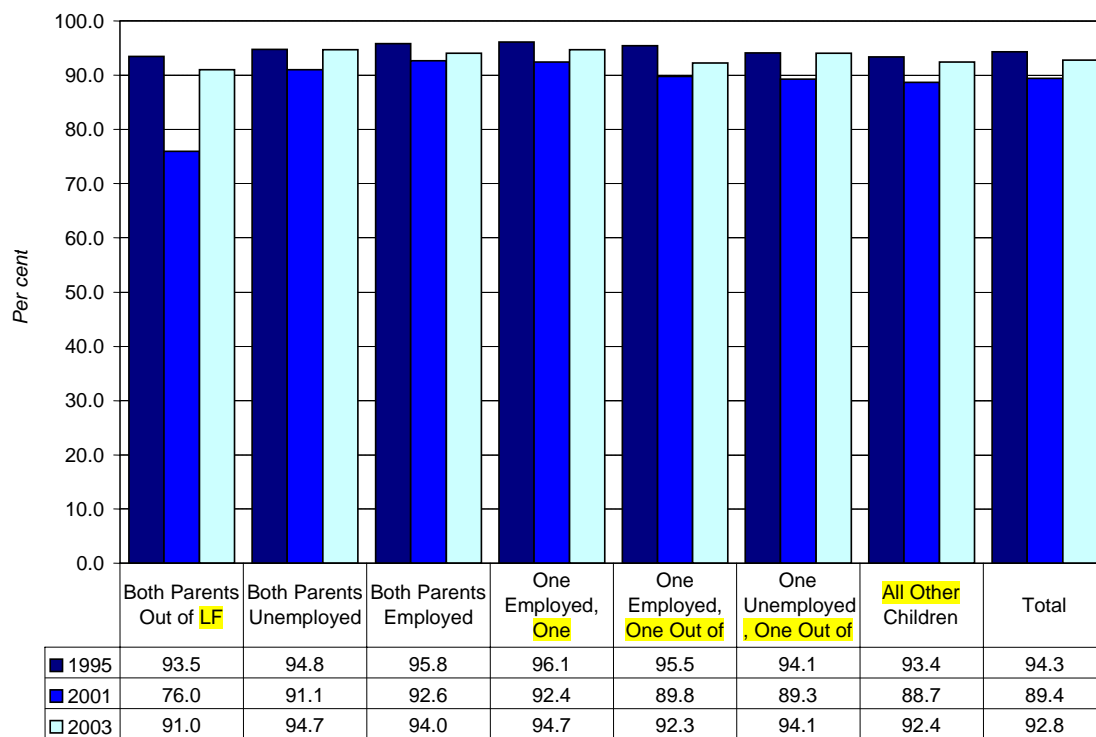
School attendance rates are greater than 90 per cent in most cases, except in 2001 where the school attendance rate was 87 per cent for those children whose resident parent(s) had less than four years of education. The figure also shows that school attendance is almost universal for those children whose parents have matriculated. Taking a closer look at the figure, it is apparent that the attendance rate gap is much larger between the first two categories of parents' average years of education, than it is between the third, fourth, and fifth categories. In other words, an increase in parents' education from 0 to 3 years, to up to 6 years, has a greater impact on school attendance rates than an improvement from 9 years of education to 12 years of education. Lower attendance rates for those with very little education (under four years) may also reflect the fortunes of rural children, whose parents are more

often poorly educated, where agriculture is seen as the main employment opportunity and children leave school early to help support their household. Nevertheless, the spread in attendance rates is relatively small overall – around seven percentage points – with the disadvantage of children of the least educated parents being relatively small.

Similarly, school attendance for seven to 18 year olds does not seem to be substantially different according to their parents' employment status. This is an important issue to investigate, due to the very high unemployment rates that characterise the South African economy. If the children of unemployed parents are more likely to leave school than their peers, it is possible that unemployment, low levels of education and poverty may be repeated from generation to generation.

Figure 44 presents school attendance rates for seven to 18 year olds according to various categories of parents' employment status, for the years 1995, 2001, and 2003.

**Figure 44: School Attendance Rates for 7-18 Year Olds, by Parents' Employment Status, 1995-2003**



Source: OHS 1995, Census 2001, LFS 2003 (Statistics South Africa).

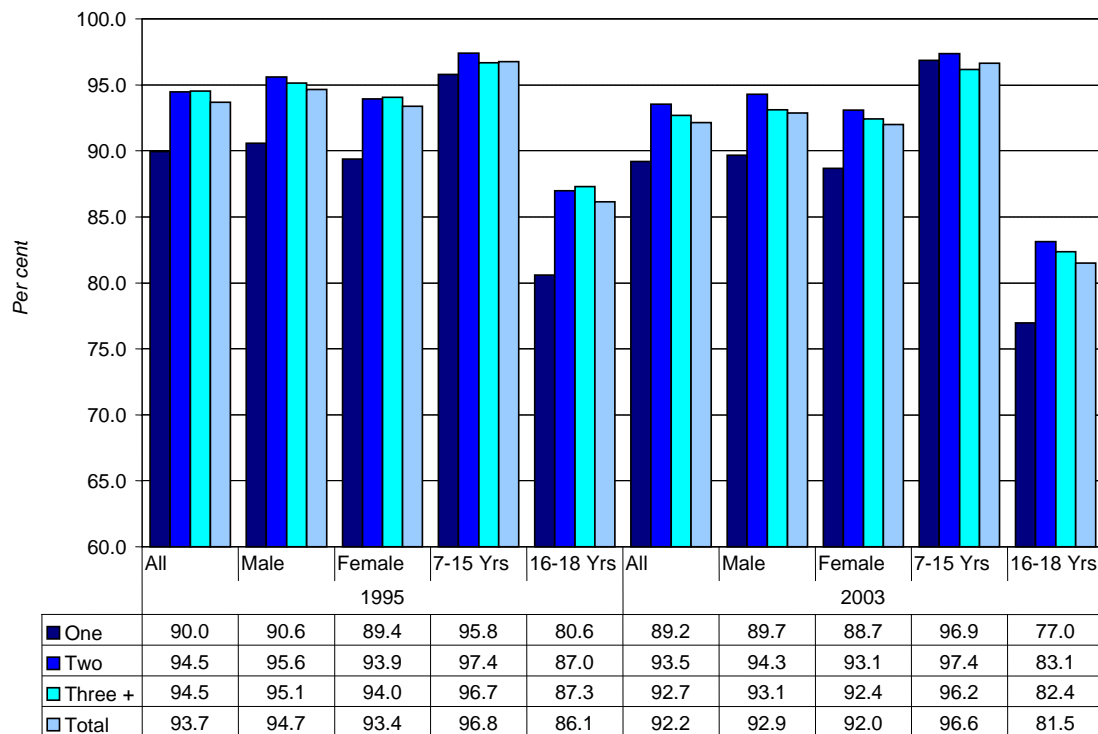
Notes: 1. Since Census 2001 labour market data are less accurate than labour market data derived from the other nationally representative household surveys, figures from the census are not strictly comparable and cannot be used to infer trends over time.

Generally, school attendance rates appear to be high, except in 2001 where for some categories of parents' labour market status, attendance rates dipped below the 90 per cent level. It is important not to read too much into the low school attendance rate of 76 per cent in 2001, where both parents are out of the labour force, because the sample size is too small (the weighted number of children who are in this category is only 2000). As can be expected, school attendance rates are marginally higher when both parents are employed or when one parent is employed and the other unemployed. School attendance rates are the lowest when both parents are out of the labour force, indicating that children may be forced to drop out of school either because they cannot afford to go to school or because they are forced to search for employment to help support the household.

As mentioned, households experiencing various kinds of pressures may remove their children from schools or other educational institutions in a bid to relieve or mitigate these pressures. Thus, as was

seen, children whose parents are both out of the labour force (being neither employed nor unemployed) are more likely to not attend school, this probably being the outcome of financial pressures on the family. The pressures experienced by families and households may be exacerbated by the number of children in the household. In Figure 45, school attendance rates for seven to 18 year olds are presented according to the number of children in the household. Different attendance rates are calculated for children according to their gender and age.

**Figure 45: School Attendance Rates of 7-18 Year Olds by Number of Children in the Household, 1995 & 2003**



Source: OHS 1995, LFS 2003 (Statistics South Africa).

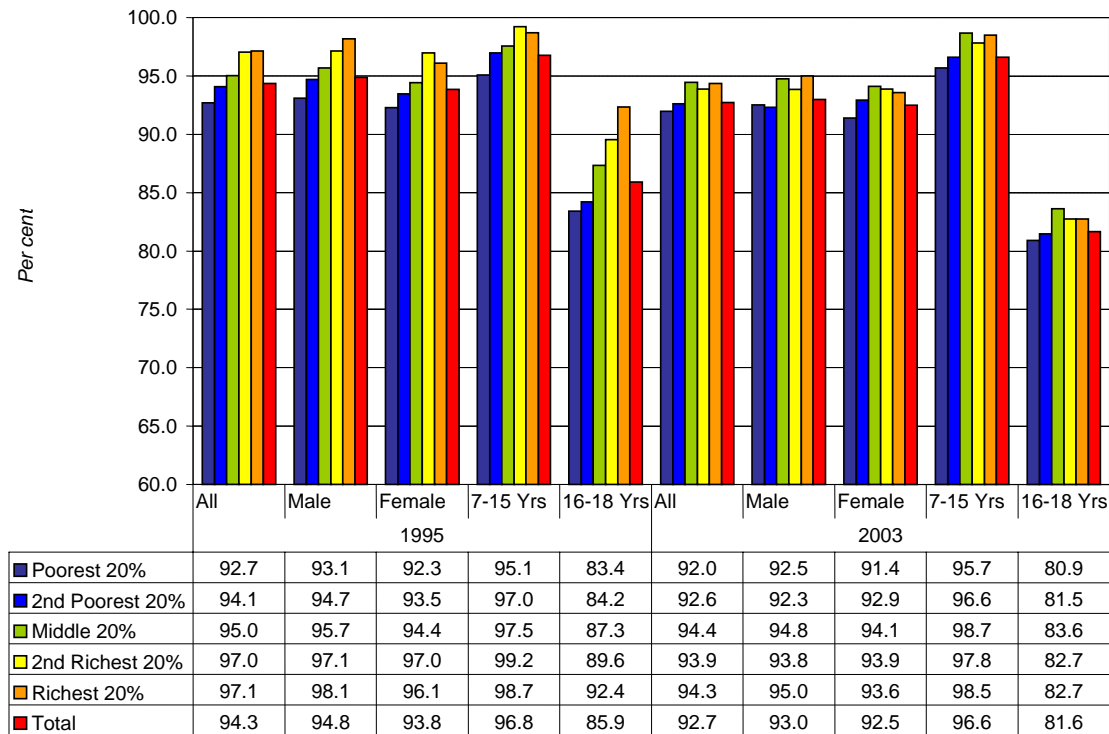
Interestingly, in both 1995 and 2003, school attendance rates are higher if there are two children in the household as opposed to one. In 2003, school attendance rates drop marginally if there are more than three children in the household. However, from the data, it does not seem that greater numbers of children in the household impact on the likelihood of attending school. The attendance rates for males are always slightly higher than for females, irrespective of the number of children in the household. Between 1995 and 2003, there has been a decrease in school attendance rates for all groups, except in seven to 15 year olds who are the only children in their households, for whom attendance increased from 95.8 per cent to 96.9 per cent.

The school attendance rates of 16 to 18 year olds are particularly low in comparison to the seven to 15 year olds. For instance, the school attendance rate of seven to 15 year olds was 96.6 per cent and that for 16 to 18 year olds was only 81.5 per cent in 2003, a difference of 15 percentage points. However, the low attendance rates of 16 to 18 year olds do not appear to be a function of increasing numbers of children in the household, since attendance rates are lowest when there is one child in the household and much higher when there are more than three children in the household. Perhaps having many children in the household implies that household chores can be shared and the need for older children to drop out of school is thus reduced.

The final household level interaction that will be investigated is the variation in school attendance of seven to 18 year olds according to the expenditure quintile of the children's households. Figure 46 illustrates school attendance rates by per capita expenditure quintile of household, by gender and age-group. In 1995, there was a rather clear correlation between the proportion of children attending school and their households' relative position within the expenditure distribution. Thus, within the richest 20 per cent of households (the fifth quintile), 97.1 per cent of children attend school, compared

to 92.7 per cent for children in the poorest (or first) quintile. This pattern was most clearly evident amongst males and 16 to 18 year olds. Interestingly, females and children between the ages of seven and 15 years saw attendance rates peak in the fourth quintile, declining slightly in the top quintile.

**Figure 46: School Attendance of 7-18 Year Olds by Per Capita Household Expenditure Quintile, 1995 & 2003**

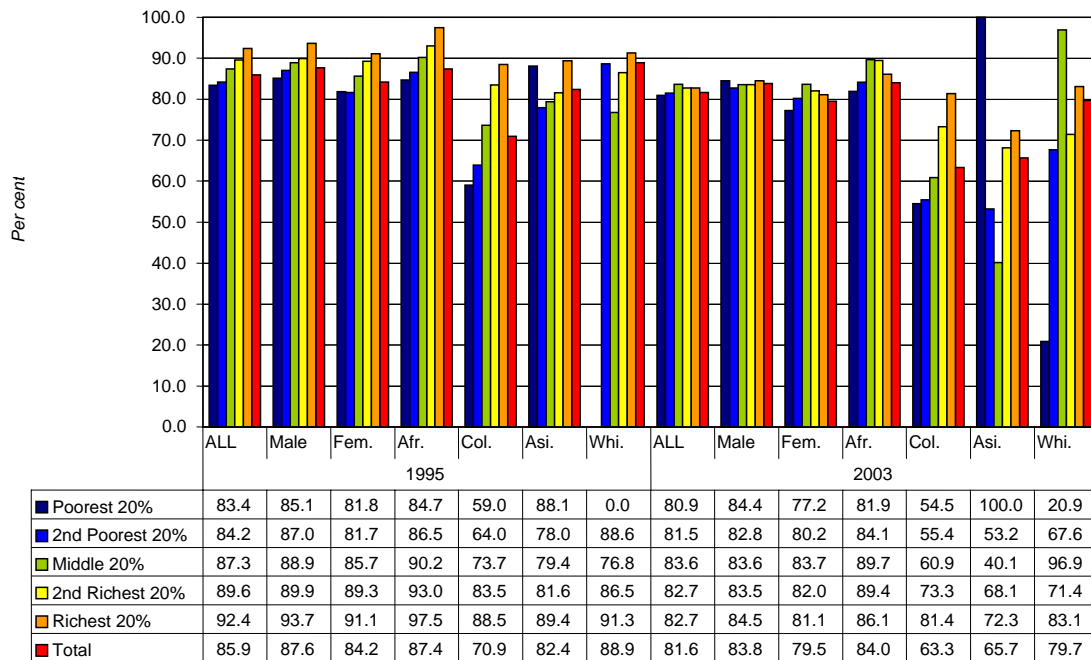


Source: OHS 1995, LFS 2003 (Statistics South Africa).

By 2003, however, the pattern seems to have become blurred. While children in the poorest two quintiles are least likely to attend school, attendance rates amongst the top three quintiles are quite similar at approximately 94 per cent. Male attendance rates are again marginally higher than those of females, while, as observed earlier, attendance has declined slightly amongst all groups over the period. However, it is somewhat difficult to explain the ten percentage point drop in the school attendance rate of 16 to 18 year olds, in the best-off quintile of households. Hence, it appears that the school dropout rate of 16 to 18 year olds is a pure function of neither the number of children in the household nor the income of the household.

Amongst 16 to 18 year olds, there seems to be an evening out of the attendance rates across the quintiles between 1995 and 2003, at a level slightly lower than that recorded in 1995 (Figure 47). Attendance rates in both years are lowest for individuals in the poorest quintile (83.4 per cent in 1995 and 80.9 per cent in 2003) and generally rise as one moves up the quintiles. However, the spread between the highest and lowest attendance rates in 2003 was 2.7 percentage points, compared to 9.0 percentage points in 1995. Apart from this reduction in the spread of attendance rates, attendance for males and females in this age-group is broadly similar.



**Figure 47: School Attendance of 16-18 Year Olds by Per Capita Household Expenditure Quintile, 1995 & 2003**

Source: OHS 1995, LFS 2003 (Statistics South Africa).

The most different pattern of attendance rates in this age-group across quintiles is to be found for Coloured individuals. In 1995, only 59.0 per cent of Coloureds in the poorest national quintile attended school, compared to 64.0 per cent of those in the second quintile, and 88.5 per cent in the richest quintile. This represents a spread of close to 30 percentage points between the lowest and highest attendance rates. Attendance of quintile 1 Coloureds was also substantially lower than the national average for that quintile of 83.4 per cent in 1995. Similarly, in 2003, only 54.5 per cent of Coloured individuals in the poorest quintile attended school, only slightly lower than the proportion of individuals in the second quintile (55.4 per cent). Nevertheless, the spread in attendance rates amongst Coloureds in 2003 was almost 27 percentage points. The spread for Africans across quintiles was almost zero in 2003, while there were too few Asians and Whites in the poorest deciles to draw conclusions regarding the patterns for these two groups. Clearly, therefore, the group for whom household income (as proxied by expenditure) was most clearly related to school attendance was Coloureds.

## 5. EDUCATION AND THE LABOUR MARKET

The interconnections between education and labour demand and supply, or the labour market, are complex. More generally, though, the appetite of the South African labour market for better-skilled workers is well known and well documented (see, for example, Bhorat 2003, Bhorat & Hodge 1999, Oosthuizen & Bhorat 2004). The observed trend of employment losses or stagnation in lower skilled occupations and employment expansion amongst more highly skilled occupations is not a new phenomenon, having been occurring since at least the 1970s. However, the education system has not been able to adapt sufficiently rapidly to new patterns of labour demand of employers, resulting in a significant mismatch between the pattern of skills demanded and the pattern of skills available in the broad labour market.

This section of the report focuses on the relationship between educational attainment and the labour market. The section begins with a broad description of the educational attainment of labour force participants aged between 25 and 64 years.<sup>8</sup> To gain further understanding of the dynamics of the relationship between the labour market and education, the education level of the employed and unemployed is explored for the two end points of our spectrum (that is, 1995 and 2003). Given that unemployment is of critical concern in society, a closer inspection of unemployment rates by level of education obtained is warranted. The final issues tackled in this section of the report examine recent training received by educational level and employment status.

### 5.1 EDUCATIONAL ATTAINMENT OF LABOUR FORCE PARTICIPANTS

The labour force is defined as the sum of those individuals who are employed and those who are unemployed. With two ways of defining the unemployed, the official definition and the expanded definition,<sup>9</sup> it is therefore possible to calculate two labour forces. Using the expanded definition, Table 19 reveals that there were 11.3 million individuals in the labour force in 1995. This grew by almost two-fifths between 1995 and 2003 to 15.8 million individuals. Of these, slightly under three million individuals were broadly unemployed in 1995 and 5.4 million in 2003. One important characteristic of the post-apartheid labour market is revealed here: that although employment grew over the period, unemployment growth was substantially more rapid. Furthermore, employment growth was most rapid amongst older individuals, with the employment of 35 to 64 year olds growing by 34.3 per cent between 1995 and 2003 compared to only 9.8 per cent over the period for those between 25 and 34 years of age.

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<sup>8</sup> The reason for limiting analysis to labour market participants between the ages of 25 and 64 years, rather than those aged 15 to 64 years, is due to the fact that individuals in the 15 to 24 year age-group are often either still in the education system or plan to continue their education in the near future. Simply stated, the educational characteristics of 15 to 24 year olds are considerably more 'temporary' in nature than those of other labour force members.

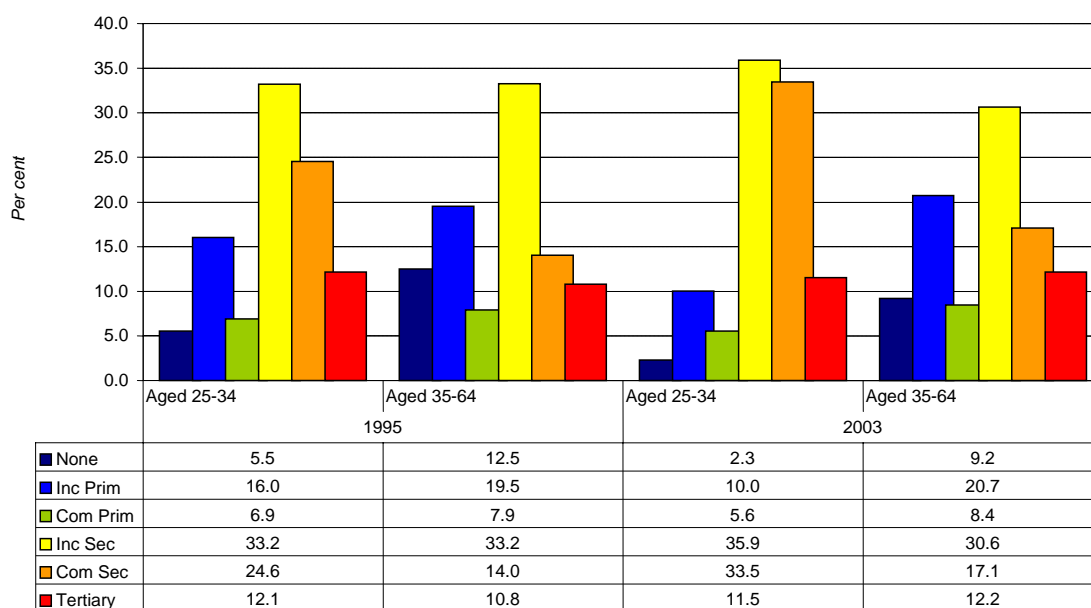
<sup>9</sup> The official definition, the definition used officially by the South African government, is also known as the narrow definition, while the expanded definition is often referred to as the broad definition. Individuals are narrowly unemployed if they "(a) did not work during the seven days prior to the interview, (b) want to work and are available to start work within a week of the interview, and (c) have taken active steps to look for work or to start some form of self-employment in the four weeks prior to the interview" (Statistics SA *Statistical Release P0210* 2002: xv). The expanded (or broad) definition of unemployment does not include criterion (c). Although the narrow definition of unemployment is the official definition, there is a strong argument that in developing countries such as South Africa it is more appropriate to use the expanded definition of unemployment.

**Table 19: The South African Labour Force, 1995 & 2003**

		1995 ('000s)	2003 ('000s)	Change ('000s)	Change (%)
Employment	25-34 Years	3 281	3 604	323	9.8
	35-64 Years	5 079	6 821	1 742	34.3
	Total	8 360	10 425	2 065	24.7
Broad Unemployment	25-34 Years	1 696	2 989	1 293	76.2
	35-64 Years	1 261	2 412	1 152	91.4
	Total	2 957	5 402	2 445	82.7
Broad Labour Force	25-34 Years	4 977	6 593	1 616	32.5
	35-64 Years	6 340	9 234	2 894	45.7
	Total	11 317	15 827	4 510	39.8

Source: OHS 1995, LFS 2003 (Statistics South Africa).

As the broad labour force provides the pool of individuals from which employers draw their employees, the educational attainment of the labour force is of critical importance to policymakers. Figure 48 presents the composition of the broad labour force according to individuals' highest level of education and does so for two age-groups, namely 25 to 34 year olds and 35 to 64 year olds. The reason for investigating educational attainment amongst 25 to 34 year olds separately is that individuals in this age-group in 1995 had received their secondary and tertiary educations in the last ten years or so of apartheid, while, in 2003, those aged 25 to 34 years generally obtained their secondary and tertiary qualifications in the first ten years of the post-apartheid era.

**Figure 48: Educational Attainment of Labour Force Participants, 25-34 and 35-64 Year Olds, 1995 & 2003**

Source: OHS 1995, LFS 2003 (Statistics South Africa).

Between 1995 and 2003, there were distinct improvements in the level of education obtained by labour force participants, particularly those in the 25 to 34 year age-group. For this age group, the proportion of labour force participants who had no education, incomplete primary and complete primary education decreased (from 28.4 per cent in 1995 to 17.9 per cent in 2003), whilst those with incomplete secondary and, in particular, complete secondary education increased (from 57.7 per cent to 69.3 per cent). The proportion achieving a tertiary qualification remained relatively stable at around 12 per cent. The most significant change for this age-group over the period was the rapid increase in the proportion of labour force participants in possession of at least a matric certificate from 36.7 per cent in 1995 to 45.0 per cent in 2003. These figures indicate that in the post-apartheid era, the education system has significantly altered the educational profile of those individuals who are entering the labour force, particularly when the 25 to 34 year age-group in 1995 is interpreted as the last true cohort of the apartheid education system and that of 2003 as the first (albeit hybrid) cohort of the post-apartheid education system. Although those with incomplete secondary education continued to

constitute the largest group within this age-group, at 35.9 per cent in 2003, it looks set to be overtaken by those with matric certificates some time in the very near future, if past trends are anything to go by.

The 35 to 64 year age-group has a far greater level of inertia – understandably, since it spans 30 years – and has therefore been slower to respond to recent changes. Over the past ten years, this age-group has been experiencing the effects of two phenomena that have resulted in a general improvement in average education levels. At the top end of the distribution, this age-group received relatively large injections of secondary and tertiary qualified individuals. This resulted in the proportion of 35 to 64 year old labour force participants with tertiary qualifications rising from 10.8 per cent in 1995 to 12.2 per cent in 2003, while the proportion with matric certificates rose from 14.0 per cent to 17.1 per cent. These increases resulted in a decline in the proportion of this group that had incomplete secondary education. At the lower end of the distribution, the proportion of individuals with no education declined slightly as individuals currently moving into the labour force became less and less likely to have avoided or been overlooked by the education system (and hence the rise in the proportion of individuals with incomplete primary education). At the same time, those with no formal education tended to be significantly older than other labour force members and were more likely to exit the labour force, either through choice (for example, retirement) or through death.

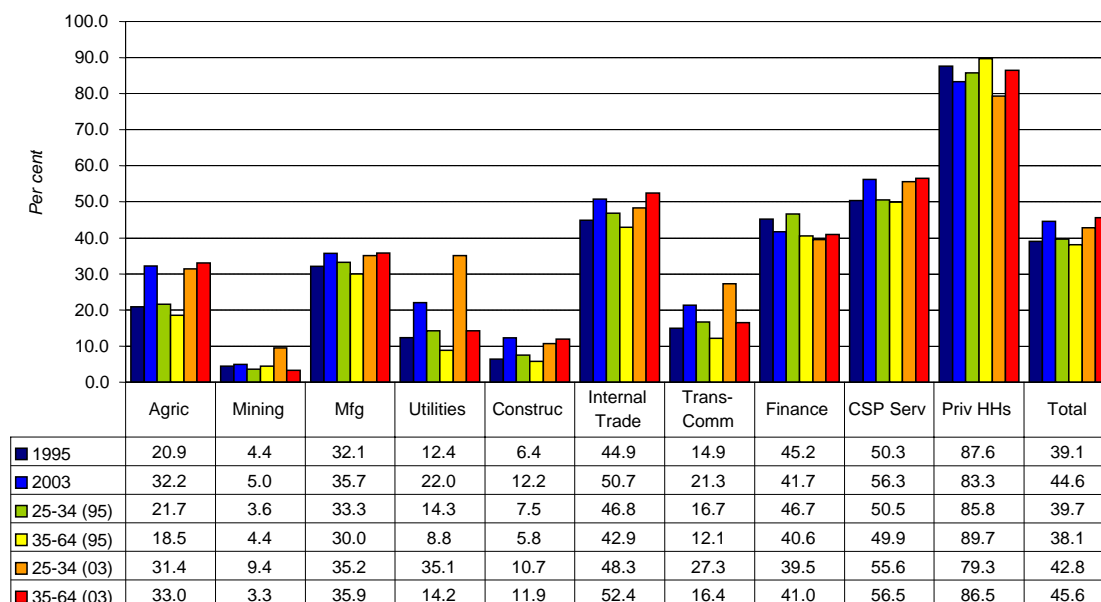
The differences in educational attainment between the younger age cohort and the older age cohort are stark. In 2003, more than half of the employed 25 to 34 year olds had obtained a matriculation certificate, whilst only a third of employed 35 to 64 year olds had this level of education. It is interesting to see that the level of education obtained is increasing not only for the employed, but for the unemployed as well. Almost four fifths of the unemployed youth had an incomplete secondary education or more, in 2003. Thus it appears that a higher level of education alone does not guarantee employment. Given the high unemployment rate in South Africa, further attention to the unemployment rate by level of educational attained is warranted.

## 5.2 OTHER GENERAL LABOUR MARKET INDICATORS

### a. *Employment*

#### i. *Female Employment*

Recent studies have noted that females are increasingly entering the labour force, this phenomenon being referred to as the increasing feminisation of the labour force (see Casale & Posel 2002; Oosthuizen & Bhorat 2004). This trend is linked to, amongst other things, the rise in the importance of the services sectors within the national economy, which are more accessible to female workers. The increased feminisation of the labour force is clearly illustrated in Figure 49, which depicts women's share of employment within each sector in 1995 and in 2003. In addition, the share of women employed in each sector is further categorised into youth employment (aged 25-34 years) and the employed aged 35 to 64 years.

**Figure 49: Female Share of Employment by Sector, 1995 & 2003**

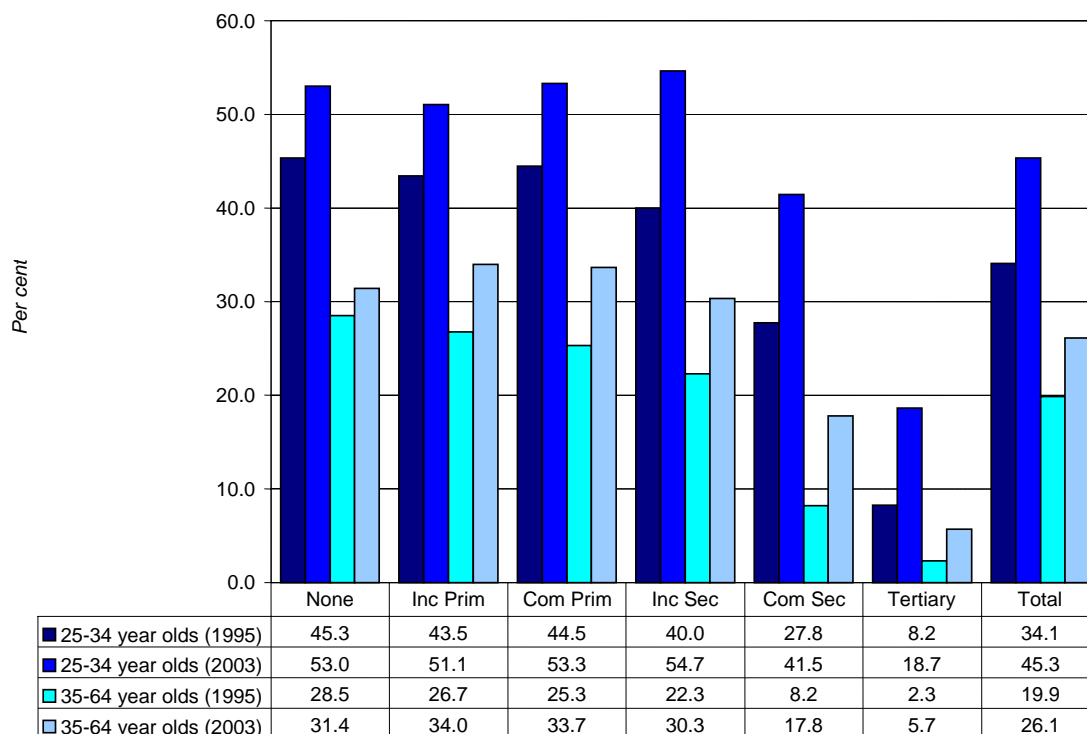
Source: OHS 1995, LFS 2003 (Statistics South Africa).

Overall, the female share of employment increased from 39.1 per cent in 1995 to 44.6 per cent in 2003. Six of the ten sectors, though, were characterised by below-average shares of females. These sectors were generally non-service sectors and included Mining (where females constituted a mere 5.0 per cent of employment), Construction (12.2 per cent), Utilities (22.0 per cent), Agriculture (32.2 per cent) and Manufacturing (35.7 per cent). The sixth sector was Transport and Communication, where 21.3 per cent of the workforce were female. In 2003, three sectors were dominated by females in terms of employment, namely Private Households (83.3 per cent of workers are female), CSP Services (56.3 per cent) and Internal Trade (52.4 per cent).

The share of women employed increased in most sectors except for the Finance and Private Households sectors. The fall in the share of women employed in Finance is rather disconcerting since this sector has been the fastest growing in South Africa between 1995 and 2002 (Oosthuizen & Borhat 2004) with much of the growth in employment in this sector being formal sector employment. With regard to youth employment, the increase in the share of women employed is most notable in the Utilities sector, which grew from a share of 14.3 per cent in 1995 to 35.1 per cent in 2003. However, this does not shed any light on the types of work done within these sectors (it could be an increase in administrative or cleaning staff as opposed to an increase in female managers and professionals).

## ii. Characteristics of the Unemployed

Figure 50 illustrates the unemployment rate for 25 to 34 year olds and 35 to 64 year olds, for differing levels of education obtained, for the years 1995 and 2003. The unemployment rate for both age cohorts increased during the period: amongst 25 to 34 year olds, unemployment rose by 11 percentage points to 45.3 per cent in 2003, while that of 35 to 64 year olds increased from 19.9 per cent to 26.1 per cent. The rapid increase in youth unemployment, however, is particularly alarming given the current rise in the levels of education amongst the youth in an environment where young people are being told that education is the key to employment and a better life.

**Figure 50: Unemployment by Highest Level of Education, 1995 & 2003**

Source: OHS 1995, LFS 2003 (Statistics South Africa).

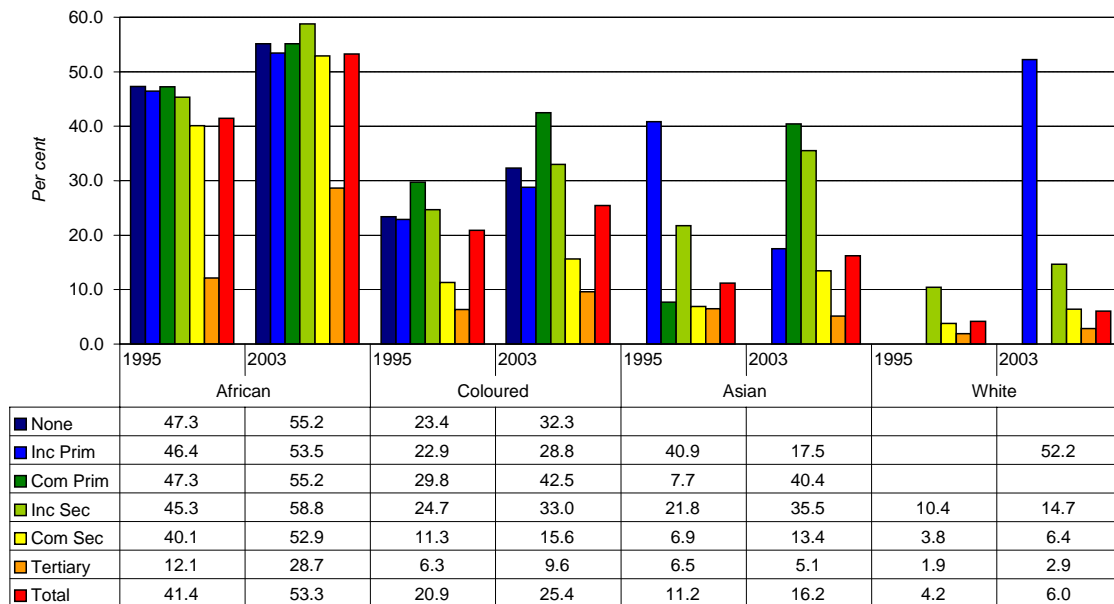
Closer inspection of the figure reveals that the unemployment rate increased for all individuals irrespective of their levels of education, and even those with tertiary qualifications are not spared. The unemployment rate amongst the tertiary qualified youth increased from 8.2 per cent in 1995 to 18.7 per cent in 2003, which means that almost one-fifth of all tertiary qualified youth are unemployed. Rising unemployment rates amongst tertiary educated labour force members have been identified (see Bhorat 2003, Oosthuizen & Bhorat 2004) and may indicate a growing mismatch between the supply of skills and the demand, an issue that certainly requires more attention. In both periods, having anything less than complete secondary education meant a chance of employment of between 55 and 60 per cent for labour force members, while those with completed secondary employment were substantially more often employed.

Irrespective of educational attainment, younger labour force members were significantly more often unemployed than their counterparts in the 35 to 64 year age-group. In 2003, the difference between 25 to 34 year olds and 35 to 64 year olds was approximately 22 percentage points for those with no education, 24 percentage points for those with incomplete or complete secondary education and 13 percentage points for those with tertiary education. In fact, the tertiary unemployment rate amongst 25 to 34 year olds was more than three times that of 35 to 64 year olds.

For a deeper understanding of the youth unemployment problem, the racial decomposition of unemployment rates by level of education for 25 to 34 year olds is illustrated in Figure 51 for the years 1995 and 2003. Youth unemployment was lowest for the White population at 6.0 per cent and highest for the African population at 53.3 per cent, in 2003. For all the population groups concerned, there was an increase in the youth unemployment rate. Most notably, the unemployment rate amongst the African youth increased by 12 percentage points during the period. Although the unemployment rate increased amongst Coloured and White graduates, the increase was most distinct for African graduates, whose unemployment rate increased from 12.1 per cent in 1995 to 28.7 per cent in 2003, despite the implementation of policies aimed at promoting the employment of these individuals. Three possible explanations of this phenomenon are offered by Oosthuizen (2004). Firstly, there could be discrimination favouring White graduates, and to a lesser degree, Asian and Coloured graduates. Secondly, employers might have preconceived perceptions of the quality of qualifications obtained from different institutions. In other words, graduates holding qualifications from previously White tertiary education institutions would be at a distinct advantage in comparison to those holding

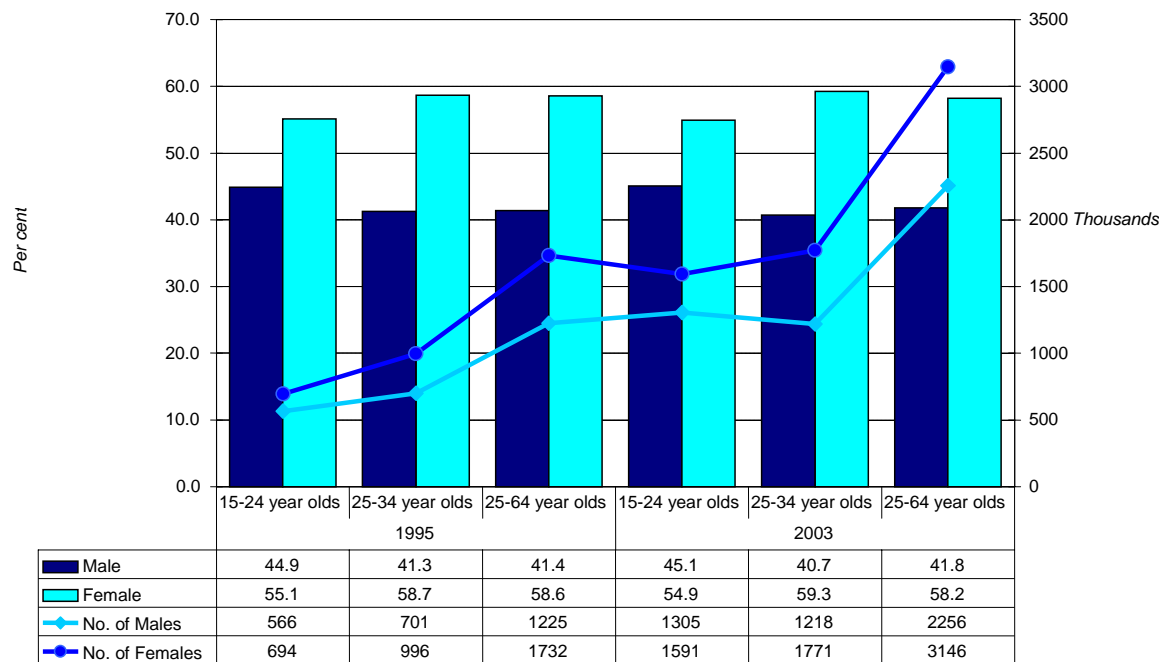
qualifications from other institutions. Finally, there is the possible mismatch between graduates' fields of study and the type of graduates required by employers.

**Figure 51: Unemployment by Highest Educational Attainment, by Race, 25-34 Year Olds, 1995 & 2003**



Source: OHS 1995, LFS 2003 (Statistics South Africa).

**Figure 52: Broad Unemployment amongst Various Age and Gender Cohorts, 1995 & 2003**



Source: OHS 1995, LFS 2003 (Statistics South Africa).

Having looked at the national and racial analysis of the unemployed, examining the unemployed on a gender basis seems appropriate. Figure 52 illustrates the number and share of men and women in

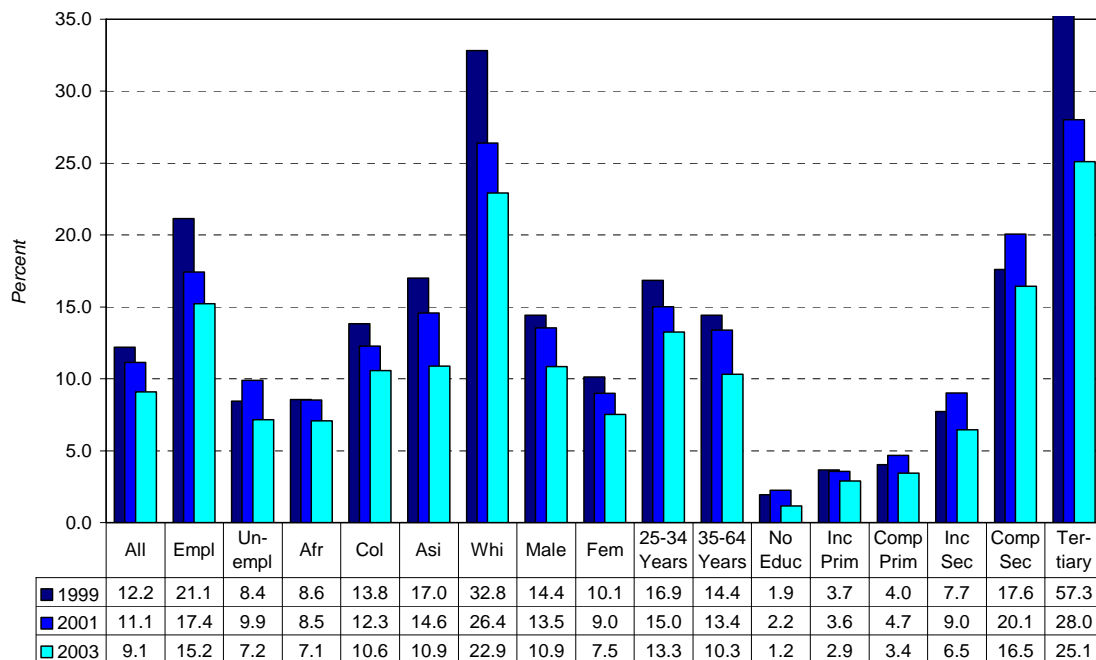
various age cohorts who were unemployed in 1995 and 2003. During the period, a distinct pattern emerges of increasing numbers of unemployed individuals across all age-groups. The number of 15 to 24 year old unemployed males more than doubled from 566 000 in 1995 to 1.3 million in 2003. A similar pattern holds for females in this age-group, where the number of unemployed females grew by 775 000 during the period. It is important to note that in 2003, a staggering 2.2 million males and 3.1 million females in the 25 to 64 year age-group were unemployed.

Noticeably, in both 1995 and 2003, unemployment amongst females was more severe than amongst males across all age cohorts, exacerbated by the rapid rate of entry into the labour market amongst the female working-age population. The gap between male and female unemployment was smallest in the 15 to 24 year age group, where in 2003, 45 per cent of the unemployed were male and a corresponding 55 per cent were female. During the period, there appears to have been a reduction in gender bias, except for those in the 25 to 34 year age cohort, where the gap increased marginally.

### iii. Training

Much emphasis has recently fallen on training, whether in the workplace or for the unemployed in an effort to raise general skill and employment levels. The more recent household surveys have also started asking questions about training undergone by respondents. Rather contrary to expectations, the proportion of 16 to 64 year olds who had undergone training “in skills that can be used for work, e.g. book-keeping, security guard training, welding, child-minding” (LFS 2001 Questionnaire) actually declined from 12.2 per cent in 1999 to 9.1 per cent in 2003 (Figure 53). Unfortunately, it is not possible to ascertain the reason for this change from the surveys.

**Figure 53: Recipients of Recent Training, Individuals Aged 16-64 Years, 1999-2003**



Source: OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

Source: OHS 1999, LFS 2001, LFS 2003 (Statistics South Africa).

The incidence of training, however, was uneven and seems rather to have been distributed in a pattern that reinforced previous inequities. In 2003, employed individuals were twice as likely as unemployed individuals to have received training: 15.2 per cent of the employed had received training as opposed to 7.2 per cent of the unemployed. This gap narrowed slightly over the period, with incidence of training amongst the employed being two and a half times that of the unemployed in



1999. However, it is important to remember that the likelihood of employment may in fact be altered by having undergone this training, and that a low proportion of the unemployed may report having undergone training precisely because those who received training found employment.

Nevertheless, what is clear is that, perhaps tied to their labour market fortunes, there were major differences in the incidence of training across racial, gender, age and education lines. Approximately seven per cent of Africans received training in 2003, compared to 10.6 per cent and 10.9 per cent of Coloureds and Asians respectively. In contrast, more than one-fifth (or 22.9 per cent) of Whites between the ages of 16 and 64 years had received this kind of training. Across all race groups, though, the proportion of those receiving training declined between 1999 and 2003, with the declines being particularly steep amongst Asians (six percentage points) and Whites (ten percentage points). Females were also less likely to have received training compared to males, although this may partly be related to lower rates of labour force participation amongst women. In 2003, 7.5 per cent of females in the 16 to 64 year age-group reported having undergone training, compared to 10.9 per cent of males.

The fact that much of the training undergone occurs at relatively young ages is revealed in the fact that 25 to 34 year olds and 35 to 64 year olds both have training rates that are higher than the average for the 16 to 64 year age-group as a whole. In 2003, 13.3 per cent of 25 to 34 year olds and 10.3 per cent of 35 to 64 year olds reported having received training. This means that the proportion of 16 to 24 year olds for whom this is true is substantially lower than the 9.1 per cent for the working-age population as a whole. Finally, the incidence of training rises rapidly according to educational attainment. Thus, 1.2 per cent of those without any education report having received training, compared to 6.5 per cent of those with incomplete secondary education, 16.5 per cent of those with matric and 25.1 per cent of those with tertiary education.

The problem here though is that it is difficult to ascertain exactly what information is being recorded by this question, since the question does not clearly define what is meant by “skills that can be used for work” (LFS 2001 Questionnaire). As a result, it does not seem that there is a clear line drawn between training and education and that the question does not separate skills obtained as part of the respondent’s education and those obtained as part of training.

## 6. CONCLUSION

Monitoring education-related indicators is key to attaining broad educational objectives, as well as a variety of socioeconomic goals, particularly in the medium- to long-term. As has been shown in this report, there is a wide variety of education-related indicators that can be calculated on a regular basis from existing nationally representative household surveys. Indeed, this report has mainly reported on the better known and more direct indicators that can possibly be derived from the datasets. Further, it is clear from the report that the indicators presented can be viewed from various angles, including race, gender, location and age. While it has not been possible to include and discuss all the indicators according to all the covariates, the databases of indicators that accompany the report contain, where possible, more detailed breakdowns of the indicators. Hence, this report is by no means meant to represent an exhaustive list of education-related indicators.

It is hoped that the indicators presented in this report and in the five databases will enable the identification of those indicators of the greatest importance and relevance to Government's objectives in the sphere of education. Given the constraints of the available data, the indicators presented attempt to comprehensively cover the first four of the Department of Education's five broad priorities as detailed in its 2004-2006 Strategic Plan, namely:

- Dealing with poverty;
- Focusing on skills development;
- Improving quality;
- Health and education; and
- Institutional development.

The final part of this report deals with outlines of suggested questions for possible modules that would focus on obtaining information from individuals trained in the field of education on the one hand, and more detailed education-related information from all respondents on the other hand. Due to the constraints facing those conducting nationally representative household surveys, it is clear that there is an either-or choice in terms of the module, while there are very serious space constraints on whatever module is finally chosen by the Department of Education. Nevertheless, particularly in the case of the inclusion of a module providing more detailed education-related information, it is believed that an important contribution to the existing data and understanding of the area can be made.

The comprehensive nature of this report means that there are numerous issues that emerge. The most important of these will be identified below.

***Demand for FET and HE institutions is likely to grow strongly over the medium term, while that of GET institutions is expected to grow at a slower rate.***

While overall population growth over the 1995-2003 period has averaged 2.0 per cent per annum, the growth rate for 16 to 18 year olds was almost twice that at 3.7 per cent per annum. In contrast, population growth amongst seven to 15 year olds has been only 1.2 per cent per annum. This has meant that the strong demand for secondary schools and FET institutions will persist in the medium term, while strong growth in demand in the higher education sector is expected. The relatively slow growth amongst younger age-groups means only that demand will continue to grow at a slower rate once these individuals reach the FET and HE sectors and not that demand for education and training will decline. The situation is particularly acute in Mpumalanga, KwaZulu-Natal, the Western Cape and Gauteng, where growth amongst the 16 to 18 year age-group has been most rapid between 1995 and 2003. Population pyramids for the provinces in 2003 indicate very young populations particularly in the Eastern Cape, KwaZulu-Natal, Mpumalanga and Limpopo.

Provincial Departments should also take note of migration trends in assessing future demand for education. As was indicated, in-migration accounted for relatively large proportions of the total child population (under 18 years) in Gauteng, the Western Cape and the Northern Cape in particular. Net migration to Gauteng and the Western Cape raised these provinces' child populations by 76 000 and 46 000 respectively, while Limpopo and the Eastern Cape experienced net out-migration of 20 000 and 46 000 children respectively. A continuation of such trends has important consequences for the provision of education opportunities to the country's youth.

***The prevailing socio-economic conditions in the provinces are important considerations when formulating education policy, particularly as these conditions may result in objectives not being met.***

In this context there are a number of challenges, particularly for the Eastern Cape, North West and Limpopo. The summary presented in Table 15 shows that these three provinces in particular are characterised by low access rates to important household services, lower educational attainment, higher dependency ratios and unemployment rates, low incomes, and higher dependence on social grants. All of these factors, as well as others, combine to create conditions in which the progress of learners through the education system is hampered. Radio is confirmed as probably the most effective medium through which government can communicate with all sections of the population.

A trend that is set to continue over the medium term and which has important implications for the education system is that of rising orphanhood rates. The number of single orphans rose by almost half a million to just over two million between 1995 and 2003, while the number of double orphans increased by approximately 150 000 to 371 000 over the same period. Orphans are predominantly African and are concentrated in KwaZulu-Natal, the Eastern Cape and Limpopo in particular. This increase places significant burdens on affected children's families and on the State. The fact that significant proportions of children still live in households that are unable to provide them with sufficient food points to the important role that school feeding schemes play in supplementing learners' diets.

***Despite its considerable inertia, the educational profile of the South African population has shown signs of improvement over the 1995 to 2003 period.***

Because the accumulation of knowledge through education takes time and because this accumulation most often occurs amongst younger people, the educational profile of the population is slow to change. However, looking at the 25 to 34 year age-group, important improvements are observable. Amongst African, Coloured and Asian individuals there have been marked increases in the proportion of the population completing Grade 12, while amongst White individuals there have been improvements in the proportion with tertiary qualifications. Equal access to education for both males and females is reflected in their profiles, which have continued to be similar over the period. Recent policy changes have also impacted positively on the proportion of Grade 12 learners who are appropriately aged. Further, in 2003, around 30 per cent of the population over 25 years of age had completed Grade 12, compared to 25.6 per cent in 1995.

This trend is, however, not limited to the 1995 to 2003 period, since improved educational attainment is also evident amongst 35 to 64 year olds. Simultaneously, the proportion of adults classified as illiterate (being unable to read or write in any language) has declined, as has the proportion of adults not completing Grade 6 (which is a proxy for functional illiteracy). However, there are still large proportions of individuals obtaining incomplete secondary educations, highlighting an important challenge as Government explores various options aimed at improving skill levels and integrating these individuals into the labour market.

The result of this improvement in educational profile has meant that educational inequalities, as roughly measured by years of education Gini coefficients, have declined. While inequality for the adult population over 25 years as a whole is relatively high, it is lower amongst 25 to 64 year olds and significantly lower amongst 25 to 34 year olds.

This improvement in the educational profile of the population comes at a time when school attendance amongst all 16 to 18 year olds and higher education participation rates amongst African 19 to 24 year olds has declined slightly, while Coloured higher education participation rates remain very low. It is clear that improving higher education participation is not an easy process, since participation at this level is influenced by participation and achievement at the FET level. Consequently, policies aimed at improving higher education participation rates need to be formulated across both HE and FET sectors.

***High school fees continue to represent an important problem faced by households and are often cited as reasons for not attending an educational institution and for not furthering education.***

Despite the fact that learners cannot be denied education on the basis of their inability to pay school fees, a lower proportion of learners report paying no school fees in 2001 than in 1995 (12 per cent vs. less than one per cent). Furthermore, while almost three-quarters of learners reported paying between R1 and R100 annually in 1995, this proportion was only 61 per cent in 2001. Nevertheless, more than 85 per cent of learners paid no more than R500 annually in school fees in 2001, slightly lower than the proportion in 1995. However, high school fees were reported to be the number two problem amongst seven to 18 year olds attending school in 2003, behind a lack of books. For Coloureds, Asians and Whites, high school fees are the number one problem. In 1995, almost two-thirds of non-matriculated

15 to 18 year olds cited a lack of money for fees as their main reason for not continuing their education, while 40 per cent of seven to 18 year olds not attending an educational institution in 2003 were prevented from attending due to a lack of money for fees.

A situation where a lack of financial resources underlies non-attendance of educational institutions cannot be tolerated, as it results in the transmission of poverty from generation to generation, particularly in the context of skills-biased employment growth that currently characterises the South African economy. Thus, poorly educated individuals are more likely to be unemployed and, if employed, will earn low incomes, making them less likely to be able to afford fees for their children, who in turn will become poorly educated adults. This is further confirmed by the pattern of school attendance of seven to 18 year olds by household expenditure quintile, where school attendance rates are consistently lowest within poorer quintiles.

***Evidence available from national household surveys indicates that school feeding schemes are relatively well targeted at learners from poorer households, although targeting is far from perfect.***

In 1999, 58 per cent of learners in the poorest quintile of households (quintile one) benefited from school feeding schemes, as did 56 per cent of learners in the second poorest quintile. However, significant proportions of learners in the top quintiles also accessed school feeding schemes: 14 per cent of those in quintile five (the best-off quintile), and 34 per cent in quintile four. Further, the largest increases in access to school feeding schemes between 1995 and 1999 occurred in quintiles two and three and not in quintile one.

Provincially, the targeting of school feeding schemes was varied. For example, over 70 per cent of learners in national quintiles one and two accessed school feeding schemes in the Northern Cape, with a similar proportion covered in the Eastern Cape. Other provinces that covered above-average proportions of learners in these quintiles were the Western Cape, North West, Mpumalanga and Limpopo. In contrast, less than one-third of learners in national quintiles one and two were accessing school feeding schemes in the Free State and Gauteng. These figures may have improved since 1999, although there are insufficient data from the national household surveys to confirm this.

***Access to skills training is unevenly distributed across the working-age population, with important implications for skills upgrading and inequality.***

Approximately ten per cent of the working-age population reported receiving 'recent' training, down from 12 per cent in 1999. However, access is unevenly distributed according to a number of covariates. Firstly, employed individuals are significantly more likely to have received training than their unemployed counterparts (15.2 per cent vs. 7.2 per cent). Whites are also more likely to have received training than members of the other race groups, as are males when compared to females. Individuals with higher levels of educational attainment are also more likely to have received training than those with no education or low levels of education, particularly from incomplete secondary education and less. Differences across these four variables – employment status, race, gender and educational attainment – serve to reinforce past inequalities by adding skills to those who relatively least require them. It is only when considering age that the distribution of training may serve to mitigate skills inequalities: 13 per cent of 25 to 34 year olds received training, compared to 10 per cent of 35 to 64 year olds.

From the data, it appears that emphasis should be placed on training that occurs outside of individuals' places of work. Unemployment is most often blamed on insufficient or incorrect training, but it is clear that most training occurs within employment. Furthermore, greater emphasis should be placed on providing training to individuals with very low levels of education, as this would play an important role in raising the overall skills level of the working-age population in general and the labour force in particular.

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## APPENDIX A: SELECTED POVERTY- AND VULNERABILITY-RELATED INDICATORS, 1995-2001

**Table A-1: Summary of Poverty- and Vulnerability-Related Statistics, 1995**

	WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
Households Lacking Access to Piped Water (%)	4.2 8	46.6 1	5.5 7	14.1 6	40.0 2	20.6 5	3.3 9	25.4 4	29.9 3	23.5
Households Lacking Access to Electricity (%)	10.0 8	66.6 2	28.9 7	31.1 6	46.7 5	51.0 3	6.8 9	47.8 4	67.6 1	39.3
Households Lacking Access to Sanitation (%)	14.5 8	72.1 2	40.2 7	52.1 6	55.5 5	62.5 3	7.3 9	61.2 4	84.8 1	48.1
Share of Population in Poorest 40% Nationally	17.5 8	62.7 1	42.6 6	54.0 2	40.9 7	51.6 3	10.1 9	46.5 5	49.7 4	40.0
Orphanhood Rate (Single + Double)	12.2 9	23.3 1	15.3 5	14.8 6	18.6 2	17.5 4	14.0 7	12.3 8	18.2 3	17.4
Rate of Access to Social Grants	11.4 5	17.5 1	14.8 3	10.3 7	14.8 2	9.6 8	4.9 9	10.9 6	12.6 4	11.6
Disability Rate	4.4 7	4.8 5	6.2 2	8.4 1	5.4 3	5.1 4	4.1 8	3.4 9	4.5 6	4.9
Share of Households with Child Hunger										
Average HH Ratio of Non-Workers to Workers	1.8 8	2.8 4	2.0 6	1.9 7	2.9 3	2.4 5	1.6 9	3.2 2	3.2 1	2.4
Share of Population in Rural Areas	12.7 8	64.8 3	28.4 7	40.5 6	61.1 4	60.4 5	5.5 9	68.7 2	90.3 1	48.9
Unemployment Rate	19.9 9	42.6 1	29.4 6	26.8 7	34.3 4	33.7 5	24.1 8	34.6 3	42.2 2	30.8
Share of 25-64 Without Grade 9	47.5 8	59.3 3	65.4 1	58.6 5	49.2 7	58.8 4	31.1 9	60.2 2	58.2 6	49.5
Share of 25-64 Without Grade 12	71.5 8	79.8 3	82.3 1	78.1 5	73.7 7	80.3 2	62.0 9	79.4 4	77.1 6	73.3
Average Institution Fees (Rands)										
<b>Ave. Poverty Ranking</b>	<b>8</b>	<b>1</b>	<b>6</b>	<b>7</b>	<b>3</b>	<b>3</b>	<b>9</b>	<b>5</b>	<b>2</b>	<b>8</b>
Human Development Index (UNDP) 1995	8	2	5	7	4	3	9	6	1	

Source: OHS 1995 (Statistics South Africa), UNDP (2003).

Notes: 1. Provincial rankings for each indicator are provided in italics below the relevant indicator, with 1 indicating the worst-off province and 9 the best-off province. Average poverty rankings are the provincial rankings of the average of the rankings for the fourteen indicators.

**Table A-2: Summary of Poverty- and Vulnerability-Related Statistics, 1999**

	WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
Households Lacking Access to Piped Water (%)	1.7 8	44.6 1	7.3 6	4.5 7	27.9 2	13.5 4	1.4 9	11.7 5	24.2 3	16.9
Households Lacking Access to Electricity (%)	11.2 9	55.7 1	26.2 6	20.9 7	35.9 3	32.7 4	15.0 8	26.3 5	47.6 2	30.5
Households Lacking Access to Sanitation (%)	12.3 9	70.1 2	37.3 7	42.1 6	55.9 5	59.4 3	13.6 8	57.9 4	83.7 1	46.1
Share of Population in Poorest 40% Nationally	15.5 9	53.3 2	33.5 7	38.9 6	43.1 3	42.0 5	26.2 8	42.7 4	54.9 1	40.0
Orphanhood Rate (Single + Double)										
Rate of Access to Social Grants	14.6 8	27.7 1	25.0 3	16.8 7	20.6 5	21.1 4	11.9 9	17.3 6	27.1 2	19.4
Disability Rate	4.3 2	4.5 1	4.0 3	3.6 4	3.4 6	3.5 5	2.4 9	3.4 7	2.8 8	3.4
Share of Households with Child Hunger										
Average HH Ratio of Non-Workers to Workers	1.6 8	2.6 2	1.9 7	2.0 6	2.2 3	2.2 5	1.6 9	2.2 4	3.1 1	2.0
Share of Population in Rural Areas	11.1 8	66.8 2	31.3 6	29.7 7	53.6 5	63.4 3	3.6 9	59.7 4	88.4 1	46.1
Unemployment Rate	18.9 9	46.8 2	29.0 8	33.8 6	37.7 4	42.0 3	32.4 7	37.0 5	50.2 1	36.1
Share of 25-64 Without Grade 9	39.8 8	59.1 2	60.5 1	54.3 6	52.1 7	56.8 3	33.9 9	55.3 5	56.5 4	48.8
Share of 25-64 Without Grade 12	66.7 8	80.1 2	80.2 1	76.2 5	74.1 7	77.7 3	60.3 9	75.0 6	77.0 4	71.8
Average Institution Fees (Rands)										
<b>Ave. Poverty Ranking</b>	<b>8</b>	<b>1</b>	<b>5</b>	<b>7</b>	<b>4</b>	<b>3</b>	<b>9</b>	<b>5</b>	<b>2</b>	<b>8</b>
Human Development Index (UNDP) 1999	8	3	6	7	4	2	9	5	1	

Source: OHS 1999 (Statistics South Africa), UNDP (2003).

Notes: 1. Provincial rankings for each indicator are provided in italics below the relevant indicator, with 1 indicating the worst-off province and 9 the best-off province. Average poverty rankings are the provincial rankings of the average of the rankings for the fourteen indicators.

**Table A-3: Summary of Poverty- and Vulnerability-Related Statistics, 2001**

	WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
Households Lacking Access to Piped Water (%)	0.8 9	41.5 1	5.6 7	5.6 6	27.2 2	12.8 4	2.2 8	9.7 5	25.6 3	15.5
Households Lacking Access to Electricity (%)	9.1 9	49.2 1	18.1 7	18.7 6	35.9 2	21.7 4	13.8 8	20.9 5	32.7 3	25.1
Households Lacking Access to Sanitation (%)	10.6 9	69.0 2	29.2 7	39.0 6	55.2 3	54.5 4	14.0 8	54.5 5	82.3 1	41.8
Share of Population in Poorest 40% Nationally	20.8 9	52.8 2	35.4 7	37.6 5	36.4 6	48.6 3	23.6 8	44.9 4	59.9 1	40.0
Orphanhood Rate (Single + Double)	11.7 9	21.8 2	15.6 7	20.2 3	21.8 1	17.1 5	14.6 8	15.8 6	17.8 4	18.3
Rate of Access to Social Grants	22.1 8	35.3 1	33.1 3	22.3 7	27.9 5	27.6 6	17.3 9	29.0 4	34.7 2	25.7
Disability Rate	4.2 8	5.8 3	5.3 5	6.9 1	5.0 7	5.9 2	3.8 9	5.8 4	5.1 6	5.1
Share of Households with Child Hunger										
Average HH Ratio of Non-Workers to Workers	1.7 8	2.4 2	1.9 6	1.8 7	2.3 3	2.1 5	1.6 9	2.3 4	2.6 1	2.0
Share of Population in Rural Areas	10.7 8	65.7 2	28.4 7	31.0 6	51.4 5	64.4 3	2.7 9	60.7 4	87.4 1	45.6
Unemployment Rate	25.9 9	48.7 2	38.7 6	38.3 7	46.2 4	46.7 3	34.5 8	41.5 5	55.1 1	41.6
Share of 25-64 Without Grade 9	38.0 8	56.1 2	56.5 1	54.3 3	46.7 7	52.2 5	31.9 9	52.9 4	52.1 6	45.7
Share of 25-64 Without Grade 12	63.4 8	77.4 1	76.0 2	75.0 4	70.1 7	75.4 3	60.5 9	74.0 5	72.1 6	69.5
Average Institution Fees (Rands)										
<b>Ave. Poverty Ranking</b>	<b>8</b>	<b>1</b>	<b>7</b>	<b>6</b>	<b>4</b>	<b>3</b>	<b>8</b>	<b>5</b>	<b>2</b>	
Human Development Index (UNDP) 2001	9	3	7	6	4	2	8	5	1	

Source: LFS 2001 (Statistics South Africa), UNDP (2003).

Notes: 1. Provincial rankings for each indicator are provided in italics below the relevant indicator, with 1 indicating the worst-off province and 9 the best-off province. Average poverty rankings are the provincial rankings of the average of the rankings for the fourteen indicators.



**Table A-4: Summary of Poverty- and Vulnerability-Related Statistics, 2003**

	WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
Households Lacking Access to Piped Water (%)	0.9 9	40.1 1	3.4 6	3.2 7	23.0 2	9.1 5	0.9 8	9.4 4	22.2 3	13.9
Households Lacking Access to Electricity (%)	6.0 9	42.8 1	17.6 5	15.3 6	30.7 2	15.0 7	11.2 8	18.9 4	25.7 3	21.3
Households Lacking Access to Sanitation (%)	8.5 9	69.3 2	27.3 7	40.8 6	53.8 5	56.5 3	13.1 8	54.7 4	83.2 1	43.3
Share of Population in Poorest 40% Nationally	16.9 9	54.9 2	38.6 6	35.4 7	45.3 4	45.8 3	24.9 8	41.5 5	55.4 1	40.0
Orphanhood Rate (Single + Double)	13.2 9	23.9 1	16.2 8	23.0 3	23.5 2	21.4 4	16.3 7	19.7 5	19.0 6	20.3
Rate of Access to Social Grants	24.7 8	46.1 2	37.9 3	32.7 7	33.7 6	34.9 5	20.2 9	36.1 4	47.6 1	32.8
Disability Rate	3.5 2	2.5 7	4.1 1	2.9 4	1.9 9	2.9 3	2.1 8	2.7 6	2.7 5	2.5
Share of Households with Child Hunger	4.9 8.0	8.8 2.0	6.8 6.0	7.4 5.0	7.6 4.0	10.9 1.0	5.4 7.0	8.8 3.0	4.8 9.0	7.0
Average HH Ratio of Non-Workers to Workers	1.7 8	2.2 2	2.0 5	1.8 7	1.9 6	2.0 4	1.5 9	2.1 3	2.6 1	1.9
Share of Population in Rural Areas	12.1 8	66.7 2	32.5 6	32.0 7	55.4 5	64.4 3	4.3 9	60.2 4	88.1 1	45.2
Unemployment Rate	26.2 9	49.4 2	39.2 7	41.0 6	45.0 4	47.1 3	37.0 8	41.5 5	55.8 1	41.7
Share of 25-64 Without Grade 9	36.9 8	56.5 1	54.6 2	49.4 6	45.5 7	53.3 3	29.3 9	50.7 5	52.5 4	43.8
Share of 25-64 Without Grade 12	64.0 8	78.4 1	74.9 2	70.6 6	69.8 7	74.5 3	56.2 9	72.4 5	74.3 4	67.9
Average Institution Fees (Rands)	938 2	244 8	388 5	426 4	444 3	304 6	1196 1	268 7	144 9	494
<b>Ave. Poverty Ranking</b>	<b>8</b>	<b>1</b>	<b>6</b>	<b>7</b>	<b>5</b>	<b>3</b>	<b>9</b>	<b>4</b>	<b>2</b>	
Human Development Index (UNDP) 2003	9	3	7	6	4	2	8	5	1	

Source: LFS 2003, GHS 2003 (Statistics South Africa), UNDP (2003).

Notes: 1. Provincial rankings for each indicator are provided in italics below the relevant indicator, with 1 indicating the worst-off province and 9 the best-off province. Average poverty rankings are the provincial rankings of the average of the rankings for the fourteen indicators.

## APPENDIX B: EDUCATION-RELATED QUESTIONS IN NATIONAL HOUSEHOLD SURVEYS USED IN THIS REPORT

### Survey: **October Household Survey, October 1995**

- 2.10 If...is younger than 6 years is he/she attending preschool, crèche or a daycare centre?
- 2.11 Is...presently attending school/college/university/technikon, etc?
- 2.12 Is...attending or has...attended a literacy or other basic education programme?
- 2.15 If...attends school, does he/she benefit from the school feeding scheme?
- 2.16 What is the highest school standard passed or education level obtained by...
- 2.17 Would...wish to continue his/her education or training?
- 2.18 If...is a scholar/student, what did the household spend on...education fees during the past 12 months?

### Survey: **October Household Survey, October 1999**

- 1.4.a What is the highest level of education that.....has completed?
- 1.4.b In what area of study was the diploma, certificate or degree?
- 1.5 Has.....been trained in skills that can be used for work, e.g. book-keeping, security guard training, welding, child-minding?
- 1.6 The last time.....received this type of training, how long did it last?
- 1.7 In what field was the training?
- 1.8.a Can.....read in at least one language?
- 1.8.b Can.....write in at least one language?
- 1.9 Which of the following educational institutions, if any, does.....attend?
- 1.10 Is this full-time or part time?
- 1.11 Which of the following institutions does.....attend? (Ask for every person 6 years or younger)
- 1.12 Does.....get free food through the school feeding scheme?
- 6.26 Are any of the following facilities within a 30 minute (2km) walk of this dwelling? (Options include Primary school, Secondary school)

### Survey: **Census, October 2001**

- P-16 Does (the person) currently attend an educational institution?
- P-16a Is this institution public or private?
- P-17 What is the highest level of education that (the person) has completed?
- P-18 In which field is (the person's) highest post-school qualification?
- P-21 How does (the person) usually travel to school or to his/her place of work?

### Survey: **Labour Force Survey, September 2001**

- 1.3a What is the highest level of education that ..... has completed?
- 1.3b In what area of study was the highest diploma, certificate or degree?
- 1.4 Has ..... been trained in skills that can be used for work, e.g. book-keeping, security guard training, welding, child-minding?

- 1.5 The last time ..... received this type of training, how long did it last?
- 1.6 In what field was the training the last time ..... received this type of training?
- 1.7a Can ..... read in at least one language?
- 1.7b Can ..... write in at least one language?
- 1.8 Which of the following educational institutions, if any, does ..... currently attend?
- 1.9 Is this full-time or part-time?
- 1.10 Is ..... mainly studying through attending classes or through distance learning?
- 7.26 Are any of the following facilities within a 30 minute (2 km) walk of this dwelling? (Options include Primary school, Secondary school)

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**Survey: Labour Force Survey, September 2003**

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- 1.6a What is the highest level of education that.....has completed?
- 1.6.b In what area of study was the highest diploma, certificate or degree?
- 1.7 Has.....been trained in skills that can be used for work, e.g. book-keeping, security guard training, welding, child-minding?
- 1.8 The last time.....received this type of training, how long did it last?
- 1.9 In what field was the training the last time.....received this type of training?
- 1.10.a Can.....read in at least one language?
- 1.10.b Can.....write in at least one language?
- 1.11 Which of the following educational institutions, if any, does.....currently attend?
- 1.12 Is this full time or part-time?
- 1.13 Is.....mainly studying through attending classes or through distance learning?
- 6.19 What means of transport are usually used, or would be used, by members of this household to get to the nearest of each of these facilities? (Options include Pre-Primary/Pre-school centre, Primary school, Secondary school)
- 6.20 How long, in minutes, does or would it take from here to reach the nearest of each of these facilities using the usual means of transport? (Options include Pre-Primary/Pre-school centre, Primary school, Secondary school)

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**Survey: General Household Survey, July 2003**

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- 1.5a Can ..... read in at least one language?
- 1.5b Can ..... write in at least one language?
- 1.10 What is the highest level of education that ..... has completed?
- 1.11 Is ..... currently attending school or any other educational institution?
- 1.12 What is the main reason why ..... is currently not attending school or any other education institution?
- 1.13 Which of the following educational institutions does ..... attend?
- 1.14 Is it a correspondence/distance educational institution?
- 1.15 How long does it take ..... to get to the school/educational institution where he/she attends?
- 1.16 What is the total amount of tuition fees paid for ..... in a year?
- 1.17 This academic year, has ..... benefited from any exemptions and/or bursaries?
- 1.18 During the past 12 months, what problems, if any, did ..... experience at the school (or other educational institution)?

- 4.45 What means of transport are usually, or would usually be used by members of this household to get to the nearest of each of these facilities? If more than one means of transport, take the one used over the longest distance. (Options include Pre-Primary/Pre-school centre, Primary school, Secondary school)
- 4.46 How long in minutes does it take or would it take, from here to reach the nearest ..... using the usual means of transport? (Options include Pre-Primary/Pre-school centre, Primary school, Secondary school)

## EDUCATION IN NATIONAL SURVEYS

### The Collection of Educator-Related Information

This study has been based on data gleaned from national household surveys conducted by Statistics SA. The surveys used can be divided into two types, with the censuses being differentiated from the rest. Population censuses aim to cover, by definition, the entire population of the country, and as a result conducting a census is a very costly, time-consuming exercise, with little room for detailed, specialised questions. The other surveys are nationally representative, meaning that from the sample of say 100 000 individuals, information can be extrapolated for the country as a whole. Basically, this is achieved by weighting up the observations in line with broad demographic and locational totals (obtained from the population census).

Efforts to obtain educator-specific information should, however, not be channelled through either the Census or nationally representative household surveys. As mentioned, the time-intensity of conducting a census and its broad nature means that addition of even a few educator-specific questions is neither desirable nor viable, nor would Statistics South Africa ever agree to the addition of such an occupation-specific group of questions to the census. On the other hand, while it is possible to add short modules to the household surveys (as is currently done with the Labour Force Surveys), the number of educators that would be sampled would be relatively small, making analysis and extrapolation of the findings to all educators more difficult and less reliable. For example, the most recent LFS (September 2003) sampled 269 teachers (SASCO codes 2320 through 2340), which when weighted represents approximately 119 000 teachers and is a clear underestimate of the number of educators in South Africa. Additional modules on the Labour Force Surveys also tend to be relatively short (for example, the migration modules in the LFSs are 15 questions long), thereby limiting the quantity of information that can be gathered. Consequently, the collection of educator-related information via existing household surveys is likely to be rather difficult, particularly where the Department of Education is interested in information from those who have left the teaching profession altogether.

Assuming a module is added to the LFS/GHS, it is essential to realise that space is limited and therefore questions will have to be prioritised in order to ensure that the most essential information is gathered. **Furthermore, questions will have to be carefully designed and tested in order to ensure that the desired information is accurately and reliably elicited from the respondents.** The following are suggested outlines of questions for a proposed module relating to individuals trained in education:

- *What education-related training do you have?*
  - Degree, Diploma, HED, other.
- *How many years experience do you have as an educator?*
  - In your career; in this phase (Allow respondent to answer an actual number of years).
- *What motivated you to become an educator?*
- *Are/Were you employed at a government or private school?*
  - If employed at a government school:
    - *Are you or were you last employed in a government or governing body post?*
    - *What phase do you currently teach or did you last teach?*

- Foundation, Intermediate, Senior, FET.
- *Are you currently employed as an educator?*
  - Yes/No.
  - If yes:
    - *To what extent do you agree/disagree with the following statements? (Strongly Disagree, Disagree, Agree, Strongly Agree, Don't Know, Not Applicable)*
      - The role that educators play is valued by society.
      - My (/educators') remuneration is in line with my (/their) qualifications and experience.
      - I am considering teaching overseas.
      - I am considering changing occupation.
      - I obtain a sense of fulfilment from being an educator.
      - I find my involvement in extra-mural activities interferes with my ability to function properly as an educator.
      - I have received sufficient support and training to be able to implement the new curriculum effectively.
      - I have sufficient resources (e.g. books, stationery, guides, etc) to implement the new curriculum effectively.
      - Etc. (Focus groups will be invaluable in uncovering important issues in this regard.)
  - If no:
    - *Why are you no longer employed as an educator?*
      - Retired at retirement age; Resigned or retired prior to retirement age; Unable to find a post; Unable to find a post nearby and unwilling/unable to relocate; Changed occupation; Pregnancy; Other.
    - If resigned or retired prior to retirement age or changed occupation:
      - *Why did you decide to leave teaching?*
        - Don't need to work; Dissatisfied with remuneration; Dissatisfied with working conditions; Inadequate teaching resources; etc. (It is clear that current and past educators should be consulted (focus groups) to draw up a list of possible reasons for leaving teaching.)

Apart from a module in an existing national household survey, there are two main alternatives: either a dedicated national survey or an ongoing school-based survey of educators. Each of these has important considerations and problems. The dedicated national survey is an expensive option, although it is best suited to obtaining a rich and relatively detailed set of data from respondents. However, the identification of educators, whether past or present, may prove difficult. One option may be to add a question into the LFS asking all individuals whether they are or have been educators, and then to revisit (a sample of) these individuals with the dedicated national survey, although this may be problematic given Statistics SA's recent problems with the panel aspect of the LFSs.

An ongoing school-based survey seems, on the surface, to be an ideal instrument with which to obtain information from educators on a continual basis. The survey could merely be a questionnaire to be filled in by educators upon resignation from their current school and could track the movement of teachers from school to school, or from education to another occupation. Ideally, the questionnaire should be completed by educators in both public and private schools and could be extended to cover graduating educators. If this were the case, a great deal of information could be garnered as to current educators' opinions regarding working conditions, conditions of employment, the implementation of and inputs regarding the Revised National Curriculum, as well as their reasons for changing schools or exiting from the teaching profession. Furthermore, motivations for entering the teaching profession may be elicited from current educators as well as graduating educators. On the negative side, a

survey of this nature represents a significant logistical challenge and an administrative burden, although this may be mitigated by buy-in from educator unions and the DoE itself. Although this type of survey would not be able to cover past educators who are no longer in the teaching profession, it will enable a detailed analysis of changing trends and issues as perceived by educators.

## 7.1 THE COLLECTION OF EDUCATION-RELATED INFORMATION

### a. *The Current Position Regarding Nationally Representative Household Surveys*

Education is one of the focus areas in all the household surveys investigated, namely the October Household Surveys, the Censuses, the Labour Force Surveys and the General Household Surveys. Over time, this section has been fleshed out considerably, from seven education-related questions in the 1995 OHS, to approximately 12 or sometimes more questions in the LFSs and GHSs. Education-related questions are vital to the usefulness of the surveys as tools for probing analysis of socio-economic questions facing South African society.

The questions can roughly be divided into four groups, based on the facet of education that they are attempting to reveal.<sup>10</sup> Firstly, the questionnaires aim to identify those attending an educational institution at the time of the survey. Secondly, information regarding their qualifications is elicited from respondents. Thirdly, the questionnaires pose questions about specific characteristics of the schools or institutions attended, and finally, information is gathered regarding respondents' distance from and mode of transport to the educational institutions they attend. As such, current national household survey questionnaires are able to successfully obtain information on educational attainment, literacy (whether from an educational attainment perspective or from the perspective of being able to read and/or write), recent training and attendance of educational institutions.

However, in a number of areas, the current LFS and GHS questionnaires are unable to provide information. For example, it is not possible to determine the type of school attended (public or private), issues surrounding leaving school and progression through the school system. Section 7.1b presents guidelines for a series of questions that aim to elicit information from respondents that would allow a range of analyses.

### b. *Suggested Modifications to Questionnaires*

The current set of education-related questions in the LFS and GHS questionnaires is able to provide important information on various facets of education. There are, however, two suggested adjustments, which, though not critically important, may help raise the usefulness of some of the data.

- **Current Attendance of Educational Institution:**

The suggested modification of this question is merely to bring the options in line with the current context, as well as more accurate information regarding young children who are not yet in school.

- *Does ..... currently attend school/educational institution?*
  - No; Pre-school (including pre-primary, grade R/0); School; Technical College/FET College; Technikon; University; Adult education centre/literacy class; Other.

- **Highest Educational Attainment:**

Although this question functions relatively well in its current form, it may be worthwhile splitting it into two sections in order to allow a greater depth in the responses. This may be particularly useful in instances where data users are interested in the number of years of education, for example. The current question asks, "What is the highest level of education that ..... has completed?" and provides a list of options ranging from no schooling to grade 0 to grade 12, through the NTC levels, to diplomas and degrees. It is suggested that one relatively minor change be made, which would still allow backward comparability with existing surveys. The question would be restructured as follows:

- *What is the highest school standard that ..... has completed?*

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<sup>10</sup> A list of the actual education-related questions contained in the surveys used in this study is presented in Appendix B below.

- No schooling; Pre-Primary; Grade R/0; Grade 1; Grade 2; Grade 3; Grade 4; Grade 5; Grade 6; Grade 7; Grade 8; Grade 9; Grade 10; Grade 11; Grade 12.
- *If ..... completed Grade 12, did he/she obtain a matric exemption?*
- *What is the highest non-school qualification that ..... has obtained?*
  - None; NTC I; NTC II; NTC III; Diploma (possibly identified by duration); Degree (possibly identified by duration); Post-Graduate Degree/Diploma; Other.

As mentioned, the current questionnaires are limited in the information they elicit from respondents and it may be worthwhile including a dedicated education module every second year or so. The questions below are *suggestions* for such a module and aim to increase the depth of the information obtained, in order to answer some of the important questions facing researchers and policymakers, and many are based on the Human Sciences Research Council's *Client Survey* for the DoE in 2004. A decision to use these questions would require proper preparation (phrasing and testing) of the questions to ensure that the desired information is consistently and accurately elicited from respondents. Each suggested question is accompanied by an explanation of the 'knowledge gap' that the question would try to close or narrow.

▪ **School Information:**

There has been a suggestion, by Haroon Bhorat, that the household surveys include the question, "What school does/did ..... attend?" This is in an attempt to enable researchers to begin to grapple with various issues that relate to individuals' schools themselves. However, there may be issues surrounding confidentiality of respondents, as well as how to deal with instances where schools no longer exist or where multiple schools have the same names. Nevertheless, such information may be invaluable in providing a link through schools' EMIS numbers between national household surveys and the datasets of the DoE.

- *What is the name of the school that ..... attends/attended?*

▪ **Costs Related to Education:**

It is clear that the cost of education is, to many households, prohibitive, despite the fact that poor households are entitled to fee exemptions, and for this reason it is important to monitor the costs that households are required to pay. Current household surveys, however, are often incomplete in terms of their coverage of the costs of education. For example, the 2003 GHS asks only the total amount paid in tuition fees in a year for each person registered at an educational institution, while the September 2001 and 2003 LFSs do not ask about the cost of education at all. The questions below aim to elicit information on the tuition fees charged, the amount actually paid by the household, whether an exemption was granted or a bursary was received and estimates of annual expenditure on education-related expenses.

- *What is the total amount of tuition fees normally required per year by the educational institution that ..... attends? (Allow an absolute amount; ask of all individuals currently registered at an educational institution.)*
- *What is the total amount of school fees paid for ..... in a year, excluding other expenses? (Allow an absolute amount; ask of all individuals currently registered at an educational institution.)*
- *If the total amount paid is less than the total amount normally required, why is this so?*
  - Exemption granted; Received bursary; Unable to pay fees, no exemption or bursary received; Other.
- *What is your estimate of the average annual expenditure involved in sending ..... to school? (Ask of all individuals currently registered at an educational institution. Depending on how well this was answered in the HSRC survey, there is a choice of asking for expenditure estimates for these items separately or as a whole or in groups of similar items.)*
  - Uniforms; Transport to and from school/educational institution; Textbooks and readers; Stationery; School trips; Private tuition; Food; Accommodation; Other.

▪ **Classroom Situations:**

The recognition that the classroom situation may impact on learners' progress at school necessitates the collection of relevant data. The following questions are asked of current learners as well as all individuals who have ever attended school and will elicit information on class composition (in terms of grades), language of instruction and issues surrounding classrooms. The fact that the questions are asked of all current learners and those who attended school in the past allows for the identification of trends, as well as research on the impact of these variables on labour market and other outcomes.

- *What type of classroom situation does/did ..... have at school (most recently attended)?*
  - Normal class with a single grade of learners and one language of instruction;
  - Normal class with a single grade of learners and more than one language of instruction (dual medium);
  - Multigrade (several grades in one class) and one language of instruction;
  - Multigrade (several grades in one class) and more than one language of instruction (dual medium);
  - Homeschooling;
  - Never attended school.
- *At the school that ..... currently attends or most recently attended, did he/she receive mother tongue instruction?*
  - Yes, in a single language class;
  - Yes, in a dual medium class;
  - No.
- *What type of system does/did .....’s school follow (most recently attended)? (To be asked of non-homeschooled individuals and it may be useful to allow multiple answers, if required.)*
  - Classes held in built classrooms;
  - Classes held outdoors due to a lack of classrooms;
  - Double shifts (some classes held in the morning and others in the afternoon);
  - Platooning (one school using buildings of another);
  - Never attended school.

▪ **Leaving School:**

Since an improvement in the general levels of education in South Africa is seen as one of the key requirements for economic growth and poverty and inequality reduction, the issue of individuals leaving school early needs investigation. Finding solutions to this problem requires that the motivations of school leavers are thoroughly understood, something which the current national household surveys (LFS, GHS) do not allow. The suggested questions below aim to establish the reasons why individuals exit the school system, at what age this occurs, and whether or not the exit is permanent.

- *What is the main reason why ..... left school?*
  - Finished studies (matriculated); to work at home; to work away from home; difficulties with schoolwork; the parents' decision; illness; no more grades in the school; change of residence; fees too high; non-fees costs of attendance too high; pregnancy; too old; failed/would have to repeat; marriage; family death; didn't want to continue/lack of interest; expelled/asked to leave; look after a sick parent; look after other sick family member; care for siblings; not worth attending school (education does not help you find a job); unlikely to be able to afford tertiary education, so completing school is not worthwhile; don't know.
- *At what age did ..... leave school for the first time?*
- *Will ..... return to school?*



- Yes, next year; yes, in the next two years; will not go back; don't know.

- **Current/Past Education:**

Individuals' educational histories are important in the analysis of numerous variables of interest to policymakers and users of household surveys. Some of the issues that are not covered in current surveys include the type of school attended (state or private) or grade progression. The current emphasis on the expansion of the number of learners taking mathematics and science subjects at school is acknowledged through inclusion of a question addressing the issue. As with various other questions, asking this question of individuals who have already completed their school education allows analysis of issues surrounding the impact of the choice of these subjects. In deciding which questions to include and how they should be structured, it may be useful to ascertain how well the specific questions upon which some of the questions below are based were answered in the HSRC survey.

- *Does/did ..... attend a government school or a private school?*
  - Government school; Private school; Don't know.
- *In what year or level/grade was ..... last year?*
  - Not studying; No schooling; Pre-Primary; Grade R/0; Grade 1; Grade 2; Grade 3; Grade 4; Grade 5; Grade 6; Grade 7; Grade 8; Grade 9; Grade 10; Grade 11; Grade 12; NTC I; NTC II; NTC III; Diploma; Degree; Post-Graduate Degree/Diploma; Other.
- *In what year or level/grade is ..... this year?*
  - Not studying; No schooling; Pre-Primary; Grade R/0; Grade 1; Grade 2; Grade 3; Grade 4; Grade 5; Grade 6; Grade 7; Grade 8; Grade 9; Grade 10; Grade 11; Grade 12; NTC I; NTC II; NTC III; Diploma; Degree; Post-Graduate Degree/Diploma; Other.
- *Are/were mathematics and/or sciences offered at the school attended by .....?*
  - Both mathematics and sciences offered; only mathematics offered; only sciences offered; neither offered; don't know.
- *Is/was ..... taking Mathematics or Science?*
  - Both mathematics and science; Only mathematics, science not offered; Only mathematics, science offered; Only science, mathematics not offered; Only science, mathematics not offered; Neither, neither offered; Neither, mathematics not offered; Neither, science not offered; Don't know.
- *Indicate the number of times ..... did the following grades in different calendar years.*
  - Grade R/Grade 0; Grade 1; Grade 2; Grade 3; Grade 4; Grade 5; Grade 6; Grade 7; Grade 8; Grade 9; Grade 10; Grade 11; Grade 12.

- **Training:**

Although the LFSs do contain three questions on training, it may be worthwhile to consider adding a question about who initiated or funded the training. This may be particularly useful in terms of monitoring employers' involvement in training.

- *Who funded the training that ..... underwent?*
  - Employer; Self/Family (including if loans were taken out); Employer & Self/Family; Training was free.

The above suggestions represent changes to two existing questions in the current LFSs, with suggestions for up to 20 additional questions to be included in a module within the LFS questionnaire. The information that these questions would elicit from respondents would provide very useful and revealing insights into many research and policy questions surrounding education, while also allowing deeper analysis in related areas. It cannot, however, be emphasised enough that before the proposed module is presented to Statistics South Africa, it needs to be carefully constructed and thoroughly tested.