



WOMEN IN A PANDEMIC

An Eighteen Month Perspective of COVID-19 and Women's Labour

Market Vulnerability in South Africa

Foreword

The Motsepe Foundation works to eradicate poverty and sustainably improve the lives of poor, unemployed and marginalised people in South Africa, Africa and the world.

In South Africa, as in many other countries, women represent the majority of those living below the poverty line and their circumstance are often defined and constrained by a variety of exclusions.

Through this Research Note, and further contributions to be made by the Research Unit, we seek to provide greater clarity on the persistent and complex challenge of gender inequality within South Africa's economic sphere in order to contribute to effective policy and action.

The Note finds that women were disproportionately affected by the pandemic and associated public health measures, and that young women in particular faced high probabilities of job loss.

We must urgently gain momentum in our recovery, and regain what has been lost. The inclusion of women needs to be a priority for private sector executives and public sector policy makers, because gender inclusion is one of the surest ways to foster cohesion, higher productivity and systemic resilience.



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Co-Founder and CEO

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Executive Summary¹

We now have eighteen months of South African data with which to assess the gendered labour market impact of Covid, and in particular the differences between men and women when it comes to labour market vulnerability.

2.1 million jobs were lost in the eighteen months from March 2020 to September 2021. Women lost more jobs in the absolute sense than men (1 082 000, or 51 % of all jobs lost), and lost significantly more jobs *proportionately*: 15% of all women's jobs were lost over these eighteen months, and 11% of all men's jobs.

The impact of job losses on the unemployment rate and the number of unemployed has been cushioned to some degree by the fact that some people have stopped looking for work and there have also been large increases in the not economically active population. This implies though that the September 2021 unemployment rate of 34.9% will increase further in the course of 2022, even if quite robust job creation were to occur, as people resume looking for work.

Over these eighteen months, the chance of losing one's job, leaving all other factors out of the picture, was roughly 1 in 8 (13%). However, in the case of historically disadvantaged women there was a 16% chance of job loss.

The high vulnerability of historically disadvantaged persons who are also young is very apparent, with women 34 or younger having had more than a 1 in 4 chance (27%) of job loss in these eighteen months and men in this age group a 1 in 5 chance (20%).

Although these two groups only accounted for 32% of all jobs in March 2020, they accounted for a startling 57% of all jobs lost.

60% of all job losses occurred in three occupational categories, namely service and sales workers, craft and related trades workers, and elementary occupations.

In each of these three categories, job losses amongst women were significantly more pronounced than for men. Amongst service and sales workers, 30% of women lost their jobs, compared to 15% of men; amongst craft and trades workers, also about 30% of women lost their jobs compared to 20% for men, and in the elementary occupations, 12% of women lost their jobs compared to 3% of men.

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It is not the case for these occupations that women were more represented in them at the outset than men, but rather that they were more likely to lose their jobs, even though there do not appear to be large gender-based differences in age distributions or educational attainments in these bands that could account for the difference.

Even if growth recovers robustly, and is highly labour-intensive, South Africa will be confronted with a very large number of unemployed men and women for the foreseeable future.

It is imperative that inclusive growth be prioritized. Lackluster and/or excessively capital-intensive growth will almost inevitably lead to a narrow unemployment rate which brushes up against 40%.

However, inclusive growth will not be enough. Measures which delay the entry into the labour market of the young are essential; in particular, improved access to quality, affordable higher education is essential.

However, even with higher and more inclusive growth, and measures which encourage delayed labour market entry, South Africa is almost certain to still confront an unemployment crisis, with 8 million or more narrowly unemployed people up to 2030. This reality cannot be wished away, and implies that more serious consideration should be given to direct support measures, such as income transfers.

I. Introduction

The Quarterly Labour Force Survey (QLFS) results up to the end of September 2021 were released on 30 November 2021.

This gives us eighteen months of South African data with which to assess the gendered labour market impact of Covid, and in particular the differences between men and women when it comes to labour market vulnerability.

Section II presents the basic labour market result of the last eighteen months for men and women.

Section III provides a more nuanced picture of labour market vulnerability by using a simple indicator: the probability of job loss having occurred over the last eighteen months, and how this has varied by sex, age, population group and other relevant variables.

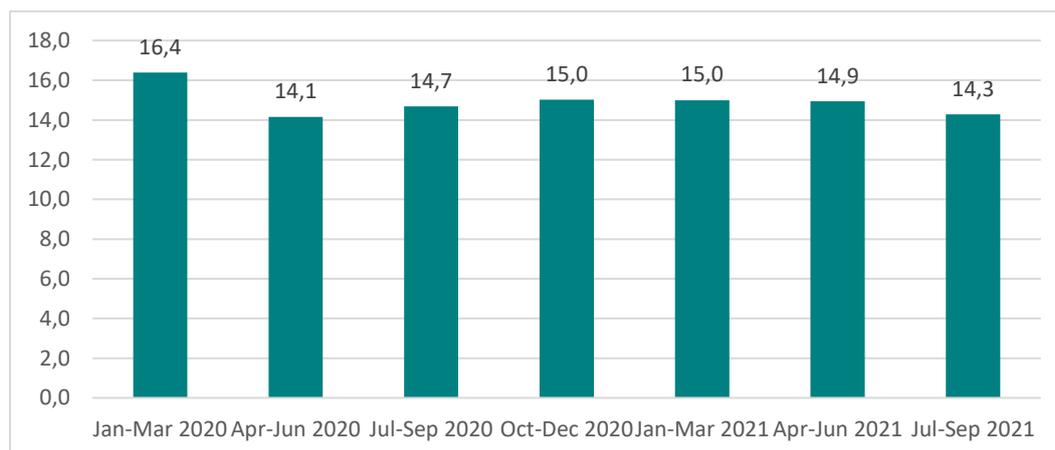
Section IV considers the LFPR and what the data now tell us in this regard.

Section V finally sets out aspects of the way forward and in particular makes the argument that there may be no realistically achievable economic growth scenario that will do enough to create required numbers of jobs up to 2030.

II. Basic Results

2.1 million jobs were lost in the eighteen months from March 2020 to September 2021. Job losses largely occurred in the initial ‘hard lockdown’, the quarter April to June 2020. However, the majority of these job losses were not recovered subsequently, and there were further job losses in the three months to end September 2021.

Figure 1: Total Employment, Q1 2020 – Q3 2021, Millions



In South Africa, men hold significantly more jobs than women: in March 2020, just before Covid struck, 9 149 000 jobs (56% of all jobs) were held by men and 7 234 000 (44%) of jobs were held by women.

Nevertheless, women lost more jobs in the absolute sense (1 082 000, or 51% of all jobs lost) than men, and lost significantly more jobs *proportionately*: 15% of all women’s jobs were lost over these eighteen months, and 11% of all men’s jobs.

Table 1: Change in Total Employment, by Quarter, Q1 2020 to Q3 2021, Men and Women (‘000)

	2020			2021			Absolute Change	% Change
	Q2	Q3	Q4	Q1	Q2	Q3		
Women	-1 064	240	182	-1	-111	-327	-1 082	- 15.0
Men	-1 171	303	151	-28	58	-332	-1 019	- 11.1

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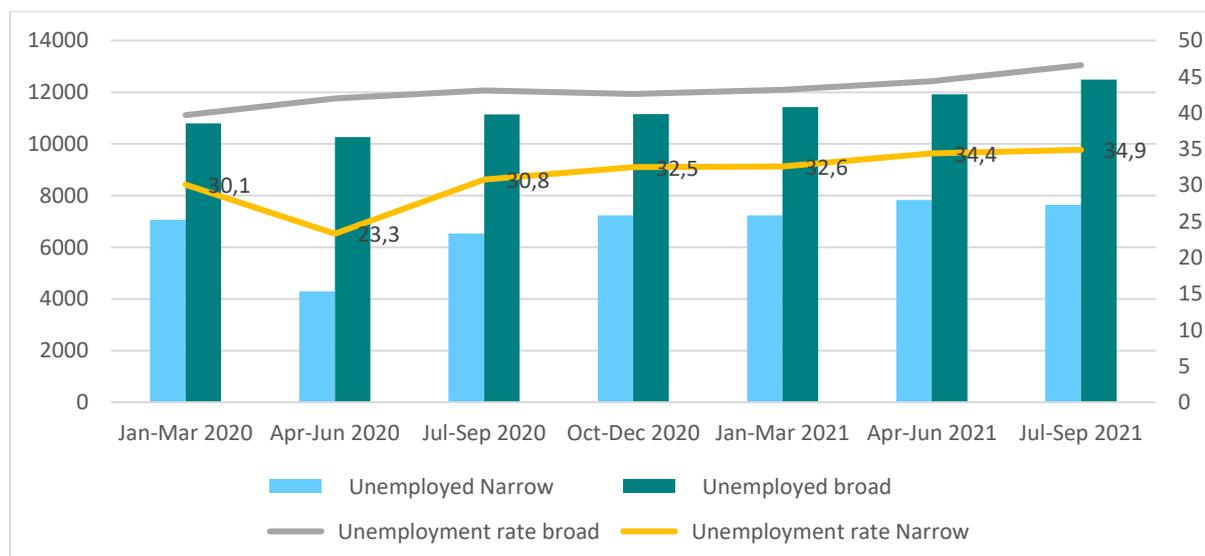
After the ‘hard lockdown’ quarter, where 2 235 000 jobs were lost in the course of three months, both men’s and women’s jobs saw some recovery in the rest of 2020. However, the nine months of 2021 for which we now have data show further job losses for both men and women.

As a result, there has been very little net change in jobs from June 2020 to September 2021, with overall employment remaining about 2.1 million less than before Covid.

Job losses have of course led to an increase in the number of unemployed, as well as increases in the unemployment rate. However, the impact of job losses on the unemployment rate and the number of unemployed has been cushioned to some degree by the fact that some people have stopped looking for work, making them not economically active rather than unemployed in the narrow definition. There have also been large increases in the not economically active population which are not attributed to discouragement, which means that the broad unemployment rate has also been cushioned to some degree from the full impact of job losses. Consequently, the number of narrowly unemployed (those who looked for work in the weeks before the survey) was ‘only’ about 600 000 more in September 2021 than in March 2020.

There is good reason to believe, as we discuss further below, that the September 2021 unemployment rate of 34.9% will increase further in the course of 2022, even if quite robust job creation were to occur, because of this large current reserve of people not looking for work. Improved prospects can, over the shorter-term, generate deteriorating labour market indicators: as jobs become available, more people resume looking for jobs, leading to a larger labour force and the risk of a higher unemployment rate.

Figure 2: Broad and Narrow Unemployment Rate and Nr. of Unemployed, Q1 2020 – Q3 2021



III. Labour Market Vulnerability: Probability of Losing One’s Job

In these eighteen months, the chances of losing one’s job, leaving all other factors out of the picture, was roughly 1 in 8 (13%), given that 2.1 million jobs out of a total of 16.4 million were lost.

The probability of job loss was not the same for men and women of course, and as we have noted the probability of a woman losing her job was 15% and for a man was 11%.

Table 2 provides further disaggregation by distinguishing between historically disadvantaged (HDP) and advantaged men and women (non-HDP).

For the most vulnerable group represented here, that of HDP women, there was a 16% chance of job loss, followed by HDP men (12%), non-HDP men (6%) and non-HDP women (5%).

Table 2: Probability of Job Loss by Gender and HDP-Status

	Prob.			Prob.
Men	-11.1	Men	HDP	-11.7
			Non-HDP	-6.1
Women	-14.9	Women	HDP	-16.3
			Non-HDP	-4.6

Table 3 further distinguishes between younger and older workers, those 15-34 and older than 34.²

Table 3: Probability of Job Loss by Gender, HDP Status and Age Group

			Probability
Women	HDP	15-34	26.5
Men	HDP	15-34	19.6
Women	HDP	35+	10.9
Women	Non-HDP	15-34	9.8
Men	Non-HDP	35+	9.1
Men	HDP	35+	6.9
Women	Non-HDP	35+	2.5
Men	Non-HDP	15-34	(Jobs increased)

² The full results, ranked by vulnerability, for ages up to 64 are provided as appendix item 1.

The high vulnerability of HDPs who are also young is very apparent, with women 34 or younger having had more than a 1 in 4 chance (27%) of job loss in these eighteen months and men in this age group a 1 in 5 chance (20%).

Although these two groups only accounted for 32% of all jobs in March 2020, they accounted for a startling 57% of all jobs lost (1.2 million jobs).

Table 4: Distribution of Job losses

			Nr of Jobs Lost	% of All Jobs Lost
Men	HDP	15-34	606 196	28.6
	Non-HDP	35+	352 937	16.7
		15-34	³	⁴
	35+	70 584	3.3	
Women	HDP	15-34	592 800	28.0
	Non-HDP	35+	459 126	21.7
		15-34	2 4326	1.1
		35+	15 071	0.7
		TOTAL	2116827	

Although far more 35+ HDP men lost their jobs than 35+ non-HDP men (353 000 as opposed to 71 000), the probability was in fact higher for non-HDP men. This result is probably due to older white men (60+) ceasing to work in this period, which may well be due to early retirement and similar decisions.

Turning to occupation data in the QLFS, we find that 60% of all job losses occurred in three occupational categories, namely service and sales workers, craft and related trades workers, and elementary occupations.

³ A small number of jobs was created.

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Table 5: Jobs Lost by Occupation, Q1 2020 – Q3 2021

	Jobs Lost	Share of All Jobs Lost
Service workers and shop and market sales workers	610 925	28.9
Craft and related trades workers	410 380	19.4
Elementary Occupation	273 876	12.9
Clerks	265 438	12.5
Plant and machine operators and assemblers	169 015	8.0
Domestic workers	159 008	7.5
Technical and associate professionals	131 138	6.2
Legislators; senior officials and managers	86 707	4.1
Skilled agricultural and fishery workers	10 917	0.5
Professionals	1 794 jobs gained	-0.1
TOTAL	2 116 827	100.0

In each of these three categories, job losses amongst women were significantly more pronounced than for men. Amongst service and sales workers, 30% of women lost their jobs, compared to 15% of men; amongst craft and trades workers, also about 30% of women lost their jobs compared to 20% for men, and in the elementary occupations, 12% of women lost their jobs compared to 3% of men.

It is not the case for these occupations that women were more represented in them at the outset than men, but rather that they were more likely to lose their jobs, even though there do not appear to be large gender-based differences in age distributions or educational attainments in these bands that could account for the difference.

Amongst service workers for example, where 29% of all jobs lost were located, women’s job share went from 48% to 43%.

Table 6: Gender and Job Losses in Three Occupations

	Share of All Jobs Lost	Women’s % Change	Men’s % Change	Women’s Share in Q1 2020	Women’s Share in Q3 2021
Service workers and shop and market sales workers	28.9	-30.2	-14.5	48.1	43.1
Craft and related trades workers	19.4	-29.4	-19.8	12.3	11.0
Elementary Occupation	12.9	-12.0	-3.4	43.1	40.8

This occurred even though, in March 2020, the share of younger than 34 workers was close to identical, with 41% of both men and women employed in the band being 34 or younger and educational attainments also being aligned.

On the face of it, then, gender bias may have played a part in the disproportionate jobs lost by women in these occupations; this could occur in two ways: women were more likely to be fired from similar positions than men; or, women of similar age and educational attainment may occupy more ‘junior’ positions within these occupations, and these positions were disproportionately impacted. Further work will need to be done to establish the relative weight of these factors as well as non-bias factors in women’s job losses over this time.

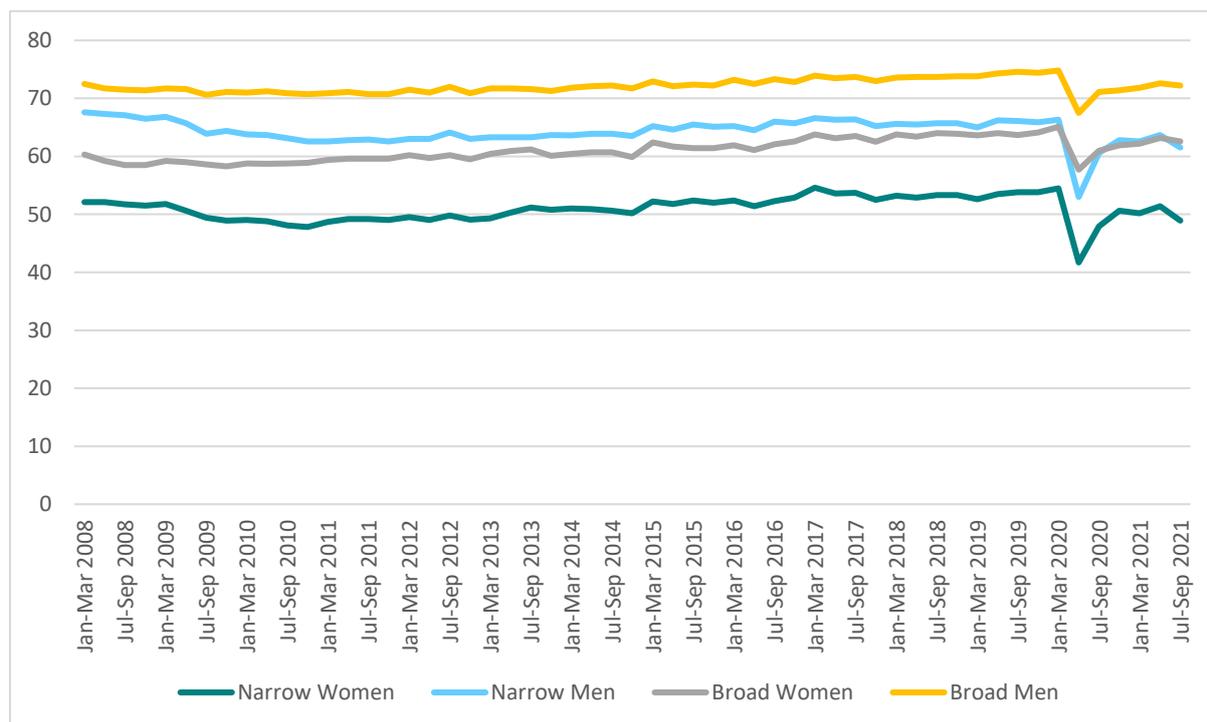
IV. Changes in Labour Force Participation⁵

The broad labour force participation rate (B-LFPR) measures the share of people 15 or older who are working, looking for work or who want to work but have given up looking due to discouragement. The narrow rate (N-LFPR) excludes the discouraged and comprises only the working and looking for work.

In South Africa, like many other countries, both the broad and the N-LFPR is higher for men than for women, due mainly to cultural patterns in favour of women as caregivers and housemakers, roles which are regarded as not economically active for labour statistics purposes.

Figure 7 firstly shows the large decline in LFPR in the hard lockdown quarter, which was due to the anomalous nature of that quarter: many additional people were classified as not economically active because they were not working or looking for work or did not give discouragement as a reason for not looking.

Figure 7: Narrow and Broad LFPR, Men and Women, Q1 2008 – Q3 2021



⁵ In this section we look at all ages, i.e. including people older than 64, so results may differ trivially from the results in sec II which use ages 15-64 only.

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There are two important things to note in figure 7. Firstly, neither the broad nor the narrow LFPR had recovered to March 2020 levels by September 2021, and both remain low by recent historical standards.

Unless significant structural change has occurred over these eighteen months, this implies increases in the labour force participation rate, which means further increase in the size of the labour force. In other words, we should expect further increases in the *unemployment rate* in the course of 2022, even if modest job creation does in fact take place, as the LFPR returns to pre-covid levels.

By way of example: in March 2020, the narrow LFPR was 60.3%. In September 2021 it was down to 55.2%. If the LFPR were to normalize such that it attained 59.5% by September 2022, this would produce a narrow unemployment rate of 38.7% *even if jobs grew by 3% over the same period*, which appears unlikely at present. At 2% jobs growth, also quite ambitious, the narrow unemployment rate would be higher than 39%.

The suffering associated with this degree of economic exclusion is already taking place, of course; but the perceptual dimension of a reported narrow unemployment rate creeping up to 40% will have an additional impact.

On the other hand, it may be that the effect of the last eighteen months has been such as to shift the LFPR downwards for an extended period of time, i.e. that some form of structural change has indeed occurred.

Table 8 shows the decrease in employment of 12.8%⁶ over the eighteen months. The increase in the unemployed, by the narrow definition, is only 9% though, leading to a decrease in the size of the labour force.

Table 8: Labour Market Status, Q1 2020 and Q3 2021

	Q1 2020	Q3 2021	% Change
Employed (a)	16595799	14478972	-12.8
Looking for Work (b)	6975153	7572988	8.6
Narrow Labour Force Size (a+b)	23570952	22051960	-6.4
Wanting to Work but not looking	3 769 720	4 932 657	30.8
Not wanting to work	14 919 115	16 370 340	9.7
Total Working Age Population	42259787	43354957	2.6

⁶ In this section over 64s are included.

Table 9: Discouraged Work-Seekers, Men and Women

	Men	Women	All
Q1 2020	1 353 576	1 569 089	2 922 665
Q3 2021	1 781 392	2 094 803	3 876 195
Increase (%)	31.6	33.5	32.6

This is because of increases in the discouraged, who make up the majority of those ‘wanting to work but not looking for work’ in the table below, and who are treated as part of the broadly unemployed.

However, an equally important development is a large increase in the number of those who do not want to work, rather than wanting to work but not looking for work: the size of this group increased by 10% (around 1.4 million) over the eighteen months.

If the economy were to recover quickly, and job creation recovered quickly, then larger numbers of the currently discouraged would resume looking for work, resulting in an increase in the narrow LFPR and pressure on the narrow unemployment rate, as we have discussed above.

However, it is not clear whether and to what extent the now larger ‘not wanting to work’ group would change to accommodate a more hopeful labour market.

It is important to understand this group, since a decrease in its numbers would lead to increases in both the narrow and the broad unemployment rate. And, from a gendered perspective, it is important to gauge whether there is a gendered dimension to the substantial increase in its size over the eighteen months.

Table 10 summarizes the *reasons* given by respondents for not wanting to work. The results suggest that these 18 months have, in addition to increased discouragement, also induced different decisions around whether to even think about jobs as opposed to other options such as studying further, making a home or retiring.

The 505 000 increase in scholars and students, the 250 000 increase in housemakers, the 340 000 more retired / too old to work, all suggest a recalibration of what we might call ‘life options’ which are not trivial in their labour market implications.

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Some trends are also socially intriguing (though it may be too soon to speak of trends). For example, with regards to those not wanting to work because they are homemakers, although women continue to dominate this role, the percentage increase for men was 21% as opposed to 10% for women: i.e. the share of men stepping out of the labour market to be parents, homemakers etc. has increased significantly in this time.

Table 10: Not wanting to work: Main Reasons, Change from Q1 2020 to Q3 2021

	Male	Female	Total increase
Scholar or student	243 359	261 310	504 668
Retired or too old for work	133 404	207 145	340 549
Unspecified	156 455	111 000	267 455
Housewife/homemaker (family considerations/child care)	51 762	200 968	252 730

We can assume that the quite large increase in unspecified reasons, of 270 000, relates in some way to covid, but unfortunately further data on this was not publicly available at the time of writing.

To summarize: 2022 will probably see further increases in the unemployment rate, even if fairly robust job creation does take place, and South Africa needs to be prepared for the psycho-social and perceptual impact of this.

The reason the UR will increase is because the LFPR remains low by historical standards and will increase again over the course of 2022; indeed, the better job creation performance, the quicker the increase in the LFPR as more people are likely to move from being discouraged to actively looking for work.

However, these last eighteen months have also seen a substantial increase in those not wanting to work because they are scholars / students, retiring, or homemakers, and it can be assumed that this represents a 'recalibration' of life choices; it is uncertain whether and to what extent people in this enlarged cohort will resume looking for work if labour market prospects improve substantially.

V. Jobs and Growth: Being realistic about what is achievable by 2030

National Treasury’s most recent growth forecasts for 2022-2024 assume real GDP growth that remains under 2%.

It is important to recognize that even if growth recovers considerably more than this, and is highly labour-intensive, South Africa will be confronted with a very large number of unemployed men and women for the foreseeable future.

Table 11 gives the results of a simple scenarios tool developed by the Motsepe Foundation which allows us to input different values for variables such as the economic growth rate, the LFPR, the working age population growth rate and the employment coefficient (the percentage change in jobs for one percentage growth in real GDP) in order to see what the likely outcomes are for the employed, unemployed and the unemployment rate.

Table 11 gives one set of outcomes for the years up to 2030. We have tried to use a realistic growth scenario, a moderately optimistic labour intensity of growth (the employment coefficient), and we have kept the LFPR and the growth of the working age population quite low.

In this scenario, which we regard as neither particularly optimistic nor pessimistic, the unemployment rate fails to get down below 35% after 2022, and in 2030 there are 9.5 million narrowly unemployed South Africans and an unemployment rate of 36%.

Table 11: Scenario Tool: Outcomes to 2030

	2022	2023	2024	2025	2026	2027	2028	2029	2030
Employment Coefficient	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7
Annual Real GDP Growth (%)	2	2	2	3	3	3	3	3	3
LFPR (%)	56	57	57	57	58	58	58	58	59
Working Age Population Growth Rate (%)	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5
Unemployment Rate (%)	34.9	36.1	36.2	35.8	36.5	36.2	35.8	35.4	36.1
Employed (Million)	14.5	14.7	14.9	15.2	15.5	15.8	16.2	16.5	16.9
Unemployed (Million)	7.8	8.3	8.4	8.5	8.9	9.0	9.0	9.1	9.5

The results in Table 11 are simply one possible scenario, albeit a credible one.

They suggest the following though:

It is imperative that inclusive growth be prioritized: this will not be enough, but lackluster and/or excessively capital-intensive growth will almost inevitably lead to a narrow unemployment rate which brushes up against 40%.

Measures which delay the entry into the labour market of the young are essential; in effect, these keep the LFPR lower, whilst also ensuring that when people do enter the labour market they are more skilled and likely to be more productive. In particular, improved access to quality, affordable higher education is essential.

However, even with higher and more inclusive growth, and measures which encourage delayed labour market entry, South Africa is almost certain to still confront an unemployment crisis, with 8 million or more narrowly unemployed people up to 2030. This reality cannot be wished away, and implies that more serious consideration should be given to direct support measures, such as income transfers.



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Appendix: Job Loss Probabilities, Full Results

Sex	Population Group	Age Group	Jobs Lost	% Change in Jobs
Female	White	15-19	-7 716	-83.1
Female	Indian/Asian	50-54	-11 036	-61.5
Female	African/Black	15-19	-9 839	-60.2
Male	White	15-19	-6 988	-54.4
Male	African/Black	15-19	-13 878	-52.7
Female	African/Black	20-24	-122 520	-40.2
Male	African/Black	20-24	-172 383	-38.4
Female	Coloured	20-24	-28 335	-37.9
Female	Indian/Asian	55-59	-5 371	-37.3
Female	Coloured	25-29	-44 950	-37.1
Female	Indian/Asian	20-24	-4 009	-36.7
Female	White	25-29	-36 933	-33.6
Male	Coloured	25-29	-42 650	-33.1
Female	Coloured	35-39	-35 331	-31.7
Female	Indian/Asian	25-29	-8 903	-30.6
Male	White	60-64	-21 885	-30.2
Female	African/Black	60-64	-35 100	-28.5
Male	Indian/Asian	25-29	-12 558	-28.5
Female	African/Black	25-29	-173 097	-26.0
Female	Coloured	30-34	-29 310	-25.8
Female	Indian/Asian	40-44	-7 176	-25.8
Male	White	20-24	-18 183	-25.7
Male	Coloured	35-39	-30 616	-25.2
Male	Coloured	60-64	-6 397	-23.4
Female	Indian/Asian	30-34	-6 313	-21.8
Male	Coloured	20-24	-17 398	-21.1
Female	African/Black	30-34	-166 473 (3)	-19.3
Male	Indian/Asian	60-64	-2 320	-18.6
Female	White	45-49	-19 720	-18.3
Female	Indian/Asian	35-39	-5 764	-17.3
Male	African/Black	30-34	-205 554	-16.5
Male	Indian/Asian	30-34	-8 596	-16.2

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Female	Coloured	40-44	-19 183	-15.8
Male	Coloured	45-49	-18 244	-15.6
Male	White	55-59	-20 662	-15.5
Male	African/Black	25-29	-139 629	-15.3
Male	African/Black	35-39	-179 556	-14.5
Male	Indian/Asian	35-39	-8 461	-14.1
Female	Coloured	55-59	-6 440	-14.1
Female	African/Black	55-59	-49 175	-13.0
Female	African/Black	45-49	-102 676	-12.9
Male	White	45-49	-16 394	-12.8
Female	White	55-59	-11 280	-10.4
Male	Indian/Asian	40-44	-5 620	-10.0
Female	African/Black	35-39	-90 128	-9.7
Male	Coloured	40-44	-10 744	-9.2
Female	White	60-64	-5 509	-9.0
Female	African/Black	40-44	-62 343	-7.7
Male	African/Black	60-64	-10 860	-7.1
Female	Coloured	50-54	-4 808	-5.6
Male	African/Black	55-59	-19 305	-5.1
Male	White	40-44	-5 379	-4.4
Male	African/Black	45-49	-35 609	-4.1
Male	Indian/Asian	45-49	-1 752	-4.0
Male	Indian/Asian	20-24	-720	-3.5
Female	Coloured	45-49	-2 275	-2.4
Male	African/Black	40-44	-24 896	-2.3
Male	White	35-39	-1 611	-1.3
Male	African/Black	50-54	-5 189	-0.9
Male	Indian/Asian	50-54	-286	-0.9
Female	Indian/Asian	60-64	-20	-0.8
Female	White	35-39	-534	-0.6
Female	African/Black	50-54	-331	-0.1
Male	White	50-54	-42	0.0
Female	White	20-24	420	1.1
Male	Coloured	50-54	1 859	2.2
Female	White	40-44	2 719	2.8

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Female	White	50-54	4 109	3.8
Male	Coloured	30-34	5 138	4.7
Male	Indian/Asian	55-59	1 129	5.2
Female	Indian/Asian	45-49	1 515	6.8
Female	Coloured	60-64	1 476	7.3
Male	Coloured	55-59	5 779	8.9
Male	White	30-34	13 159	10.6
Male	Coloured	15-19	2 031	12.7
Male	White	25-29	16 225	15.3
Female	White	30-34	19 902	21.8
Female	Coloured	15-19	4 546	56.6