

THE REAL ECONOMY BULLETIN

TRENDS, DEVELOPMENTS AND DATA

PROVINCIAL REVIEW 2024

TIPS's annual Provincial Review analyses key economic and policy developments in the provinces. This overview report summarises how the national economic geography is changing in terms of GDP, population, employment, formal business location, and infrastructure. For each province, a separate publication describes developments and major new projects in more depth. This review analyses provincial trends primarily up to 2023, the latest available estimates as of early 2025.

GDP growth

Every province felt the effects of the slowdown across the economy in 2023. In terms of income, provinces that depend heavily on mining – that is, Limpopo, Mpumalanga, North West and the Northern Cape – were hit by the fall in world mineral prices. In contrast, the provinces with big metros (Gauteng, the Western Cape and KwaZulu-Natal) increased their share in national value added, following two years of decline. Overall, the position of provinces in the national economy still largely parallels patterns of wealth and deprivation entrenched by apartheid policies.

The GDP grew 0.7% in 2023, compared to 1.9% the year before. Every province saw a slowdown. Gauteng saw a particularly sharp fall in growth.

Despite the slowdown, for the second year in a row the provinces with large metros – Gauteng, KwaZulu Natal and the Western Cape – grew faster than the other provinces except for the Eastern Cape. Relatively rapid growth in the three largest provincial economies aligned with trends from 1994 to 2019. During the COVID-19 downturn and its initial recovery in 2020 and 2021, in contrast, these three provinces grew more slowly than the rest (see Graph 1). Still, they continued to contribute two thirds of national value added (see Graph 2).

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In addition to this overview, analyses of economic developments in individual provinces are available at [REB Provincial Review 2024](#)

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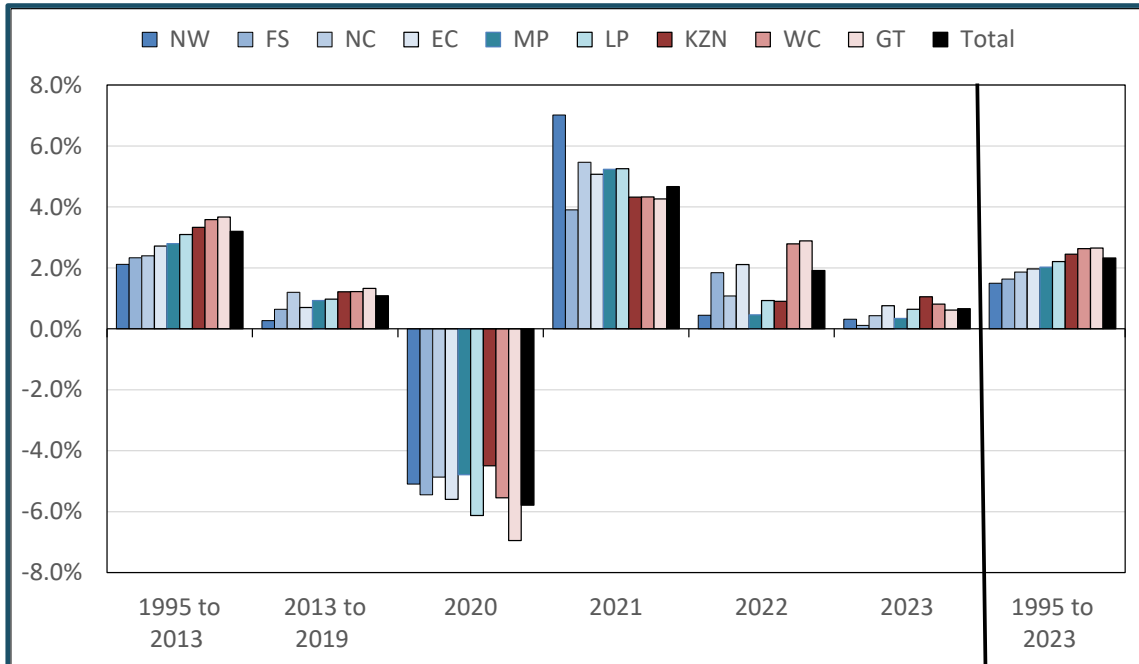
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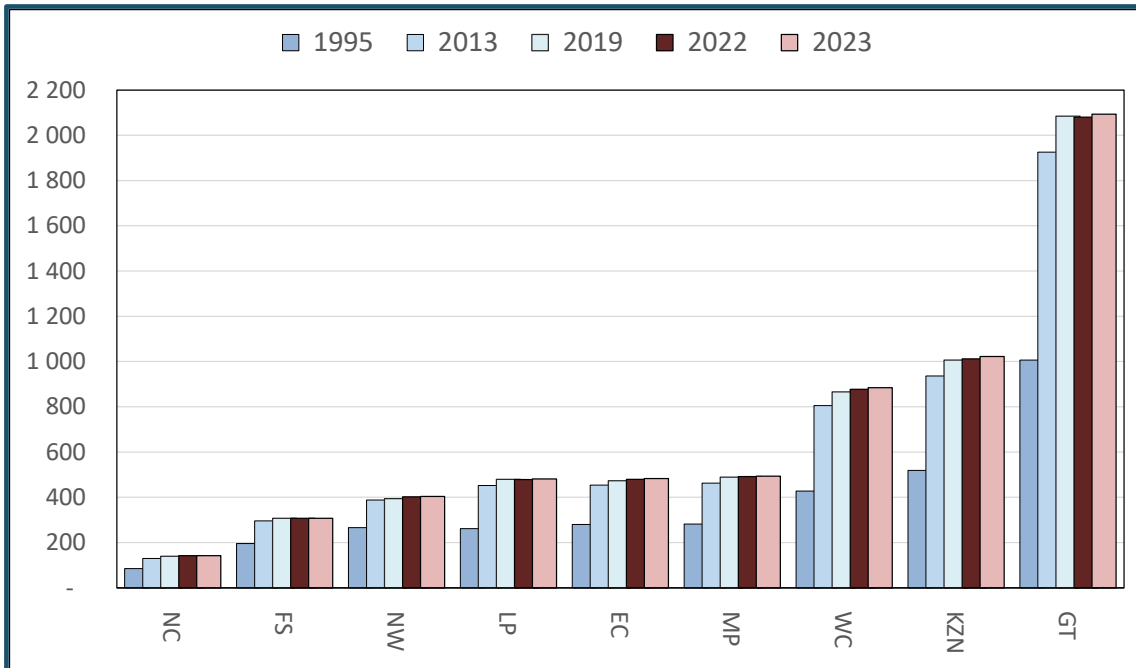
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Graph 1. Change in gross value added by volume, selected years



Source: Calculated from Quantec. EasyData. Standardised regional series. Accessed at www.quantec.co.za in January 2025. Note: NW=North West, FS=Free State, NC=Northern Cape, EC=Easter Cape, MP=Mpumalanga, LP=Limpopo, KZN=KwaZulu-Natal, WD=Western Cape, GT=Gauteng.

Graph 2. GDP at constant prices in billions of 2023 rand (a) for selected years



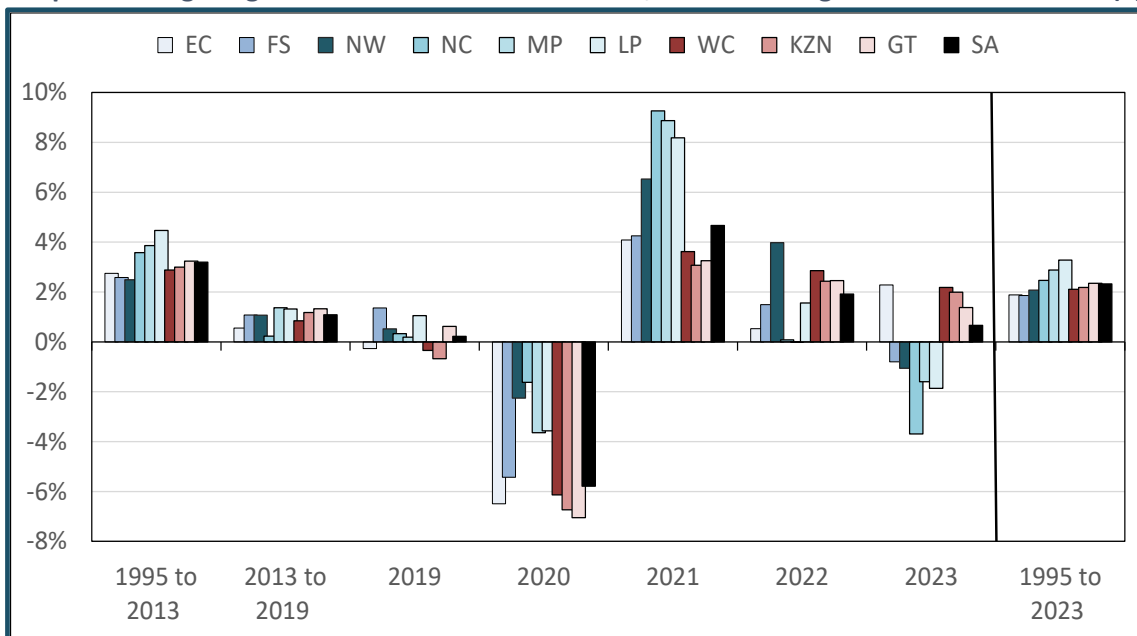
Note: (a) Rebased with provincial GDP deflator rebased to 2023. Source: Calculated from Quantec. EasyData. Standardised regional series. Accessed at www.quantec.co.za in January 2025.

The extraordinary fluctuations in mining prices in the past five years mean that the GDP at constant prices, which portrays the physical volume of production, does not adequately reflect the experiences of the relatively mining-dependent provinces. Mining prices plummeted in 2023

after reaching historic peaks in 2021 and 2022. As discussed in more detail in the next section, the mining sector contributed, on average, 23% of provincial value added in Limpopo, Mpumalanga, North West and the Northern Cape in 2023, compared to 2% in the rest of the country. These four provinces produced almost 80% of the national value added from mining, up from under 65% in 1995. Their incomes fell sharply with the 2023 drop in world mining prices despite stable production volumes.

The effect of the recent crash in mining prices on individual provinces can be understood by deflating figures for provincial GDP with the national GDP deflator. The resulting estimates indicate how the provinces' purchasing power changed as a function of the relative price of their output as well as the volume of production. Using this indicator, the four most mining-dependent provinces experienced an average decline of 2.2% in 2023. In contrast, in 2021 – when world mineral prices initially spiked following the COVID-19 downturn – by this measure, their income climbed 8.5% in real terms. That was twice as fast as the recovery in the rest of the country (see Graph 3).

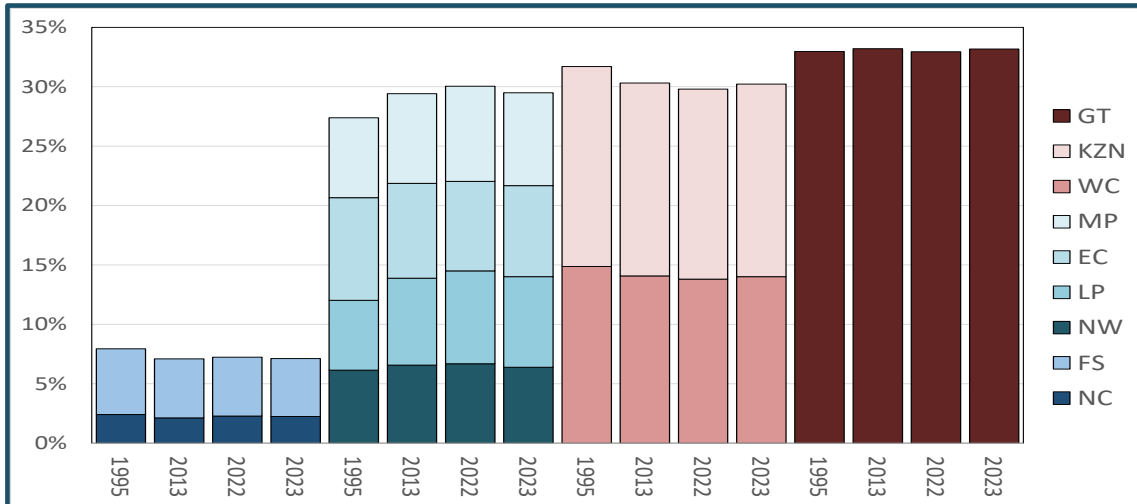
Graph 3. Change in gross value added in value terms, deflated using national GDP deflator (a)



Note: (a) Deflating figures for provincial value added in current rand using the national GDP deflator indicates the change in purchasing power for the province relative to the economy as a whole, given the underlying changes in the physical volume of production for the province. *Source:* Calculated from Quantec. EasyData. Standardised regional series. Accessed at www.quantec.co.za in January 2025.

The importance of mining diversification for South Africa's economic geography also emerges in the changing shares of the individual provinces in national value added. Still, the changes modified the long-standing dominance of the metro centres only marginally. As Graph 4 shows, the share of the four new mining provinces as a group dropped in 2023 to 29% from 30% in 2022. The fall reversed a long-term climb driven mostly by Limpopo. In contrast, all of the provinces with major metros increased their GDP share in 2023.

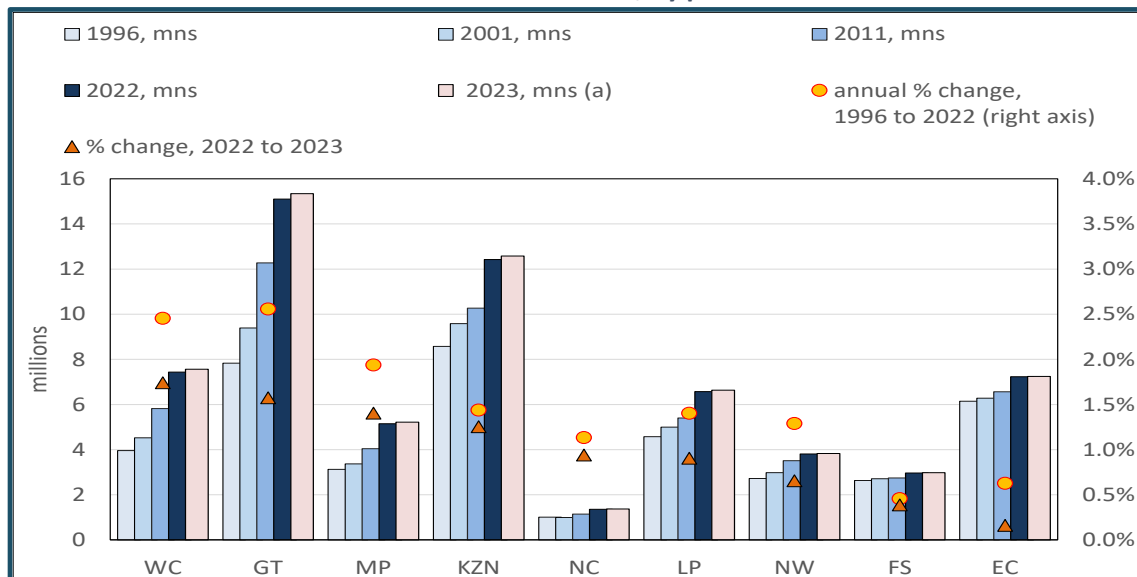
Graph 4. Share in national value added by province (a), 1995, 2013, 2022 and 2023



Note: (a) Using current rand. Source: Calculated from Quantec. EasyData. Standardised regional series. Accessed at www.quantec.co.za in January 2025.

The evolution of GDP per person in the provinces is heavily affected by persistently high levels of rural-urban migration by international standards. In 2023, Statistics South Africa estimated that the population in the main metro provinces and Mpumalanga grew much faster than the national average of 1.2%. In contrast, in the Free State and Eastern Cape, the population expanded by just 0.2%. Since 1994, families have moved *en masse* from the impoverished historic labour-sending regions, which under apartheid were shaped by forced relocation from economic centres plus very low public investment. Because provincial borders largely align with apartheid boundaries, the result has been rapid population growth in the metros and mining towns in the northern provinces, with near-stagnant populations in the Free State and Eastern Cape (Graph 5).

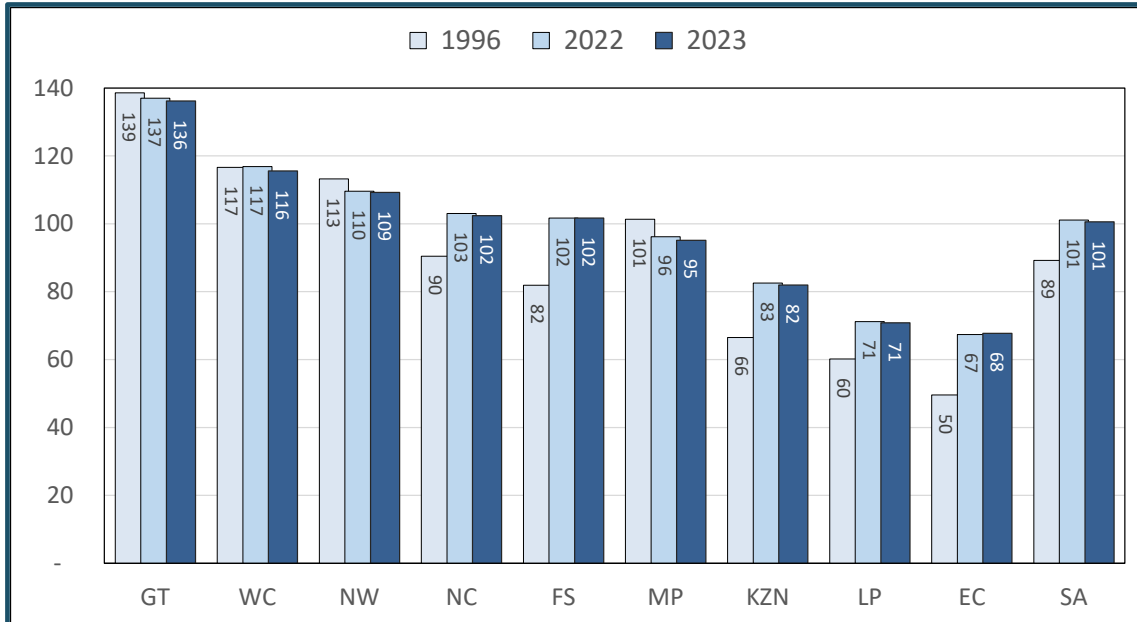
Graph 5. Population in millions and annual percent change in population from 1996 to 2022 and from 2022 to 2023, by province



Note: (a) Quantec estimates population in millions using the growth rate from Statistics South Africa's mid-year estimate for 2023 and the 2022 Census figure for the provincial population. Source: From 1996 to 2022, calculated from Statistics SA. Census 2022. Statistical release. P0301.4. Page 4. Available at www.statssa.gov.za. For 2023 data, Quantec. EasyData. Standardised regional series. Accessed at www.quantec.co.za in January 2025.

Nationally, the GDP per person declined in 2023. The fall was mirrored in all of the provinces except the Eastern Cape. Over the longer run, migration to the main economic centres strongly affected value added per person. In volume terms, the figure declined slightly from 1996 to 2022 in Gauteng and the Western Cape. Nonetheless, Gauteng remained around 40% above the national average. The GDP per person grew far more rapidly, however, in all the other provinces except for the North West and Mpumalanga (Graph 6).

Graph 6. GDP per person in constant (2023) rand (a) by province, 1996, 2022 and 2023 (b)



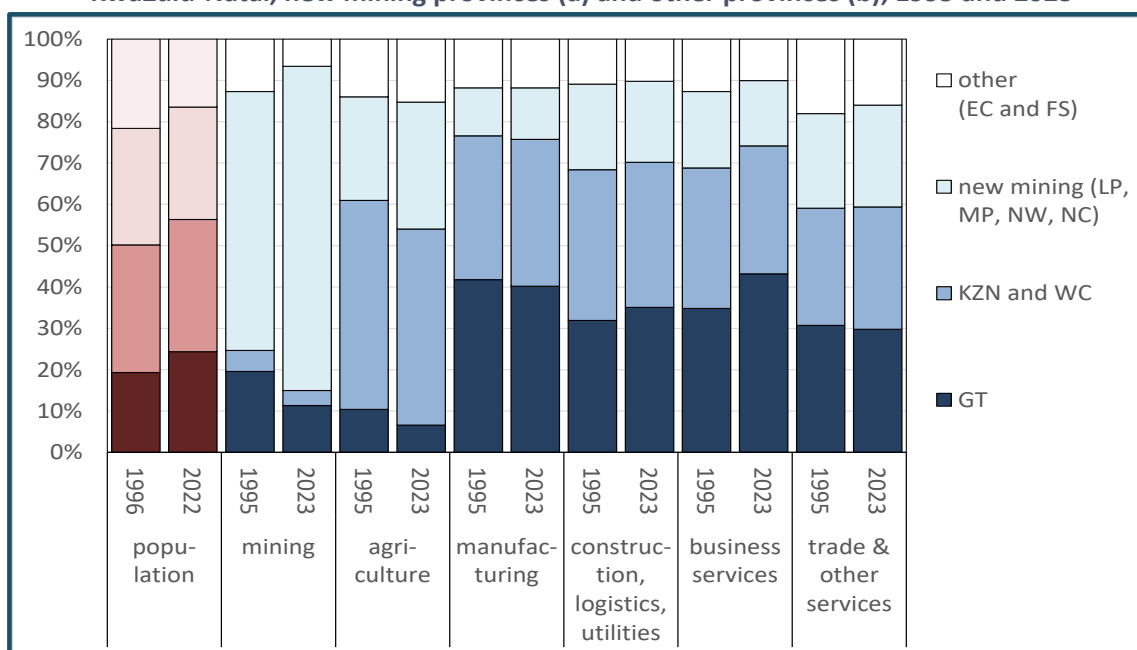
Notes: (a) Rebased with GVA deflator for each province rebased to 2023. (b) Quantec estimates population in millions using the growth rate from Statistics South Africa’s mid-year estimate for 2023 and the 2022 Census figure for the provincial population. Source: From 1996 to 2022, population from Statistics South Africa. Census 2022. Statistical release. P0301.4. Page 4. Available at www.statssa.gov.za. For GVA and for 2023 population data, EasyData. Standardised regional series. Accessed at www.quantec.co.za in January 2025.

GDP by sector

In every province, services continued to drive economic growth in 2023, with manufacturing lagging well behind. The provinces with major metros dominated manufacturing, but heavy industry was more important in Gauteng than in the Western Cape and KwaZulu-Natal. In every province, the largest and fastest growing manufacturing industry was food processing, although its value added dipped in 2023. The structure of services varied substantially between the main economic centres and the rest of the country. Private business services accounted for most of the growth in the sector in the provinces with major metros. In the rest of the country, personal and social services were more important.

Virtually all categories of economic activity except for mining, social and personal services, and retail were disproportionately located in the provinces with major metro areas. As noted, mining was increasingly concentrated in the four Northern provinces (see Graph 7).

Graph 7. Share of value added in major sectors by Gauteng, the Western Cape and KwaZulu-Natal, new mining provinces (a) and other provinces (b), 1995 and 2023



Notes: (a) Limpopo, North West, Mpumalanga and Northern Cape. (b) Eastern Cape and Free State.

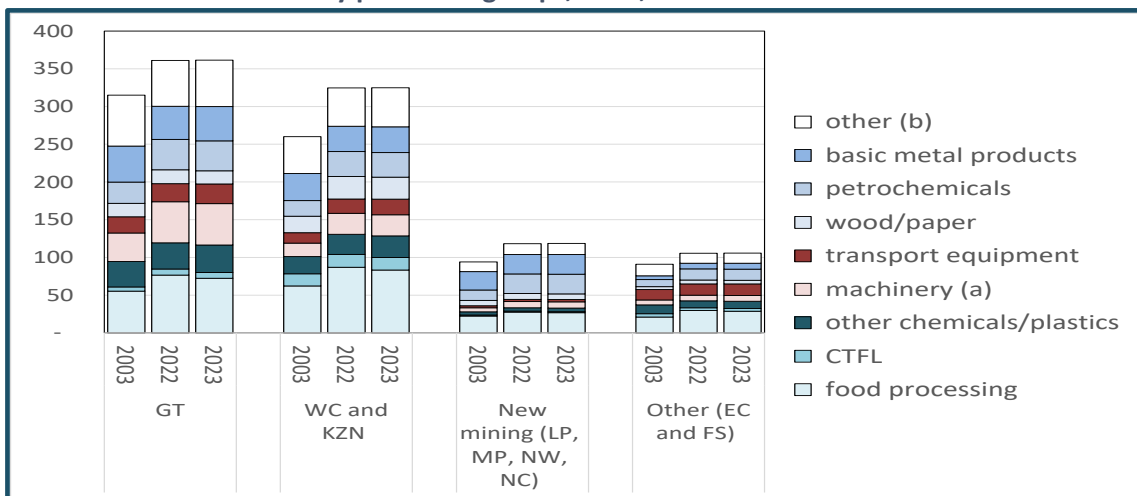
Source: Quantec. EasyData. Standardised regional series. Accessed at www.quantec.co.za in January 2025.

The volume and production structure of manufacturing varies heavily by province, mostly reflecting the economic geography established long before 1994. In every province, food processing was the largest single industry in 2023, and one of the fastest growing. In contrast, while total value added in clothing and textiles remained virtually unchanged over the past two decades, its provincial distribution evolved. The main centres remained in the Western Cape and KwaZulu-Natal; but value added in the Eastern Cape shrank while it grew significantly, albeit off a low base, in Gauteng.

Gauteng remains reliant on heavy industry, especially machinery production and coal and metals refineries. Over the past two decades, machinery has been the fastest growing manufacturing industry in Gauteng. In KwaZulu-Natal and the Western Cape, heavy industry is less important, while food processing, clothing and textiles, and wood and paper are larger. Still, from 2003 to 2023, the fastest growing manufacturing industries in these two provinces were machinery and transport equipment.

Overall manufacturing in the mining-dependent provinces remained far smaller than in the three economic centres. It comprised almost exclusively resource processing – specifically food, coal and metals. Manufacturing in the Free State and the Eastern Cape was also small and relatively slow growing in the past two decades. The Eastern Cape retained substantial auto production while the Free State remained a centre of Sasol’s coal-based petrochemicals production (see Graph 8).

Graph 8. Manufacturing value added by volume in billions of constant (2023) rand by provincial groups, 2003, 2022 and 2023

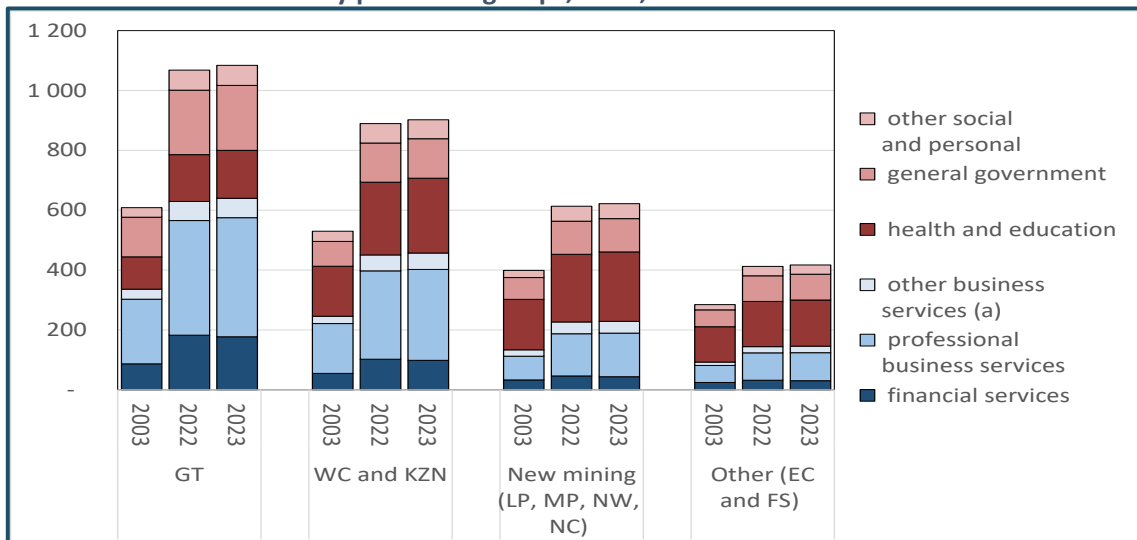


Notes: (a) Includes electrical machinery and instruments, but excludes transport equipment. (b) Includes furniture, publishing, recycling and other smaller products. Source: Quantec. EasyData. Standardised regional series. Accessed at www.quantec.co.za in January 2025.

From 2003 to 2023, growth in private and public services accounted for most of the expansion in the GDP. This pattern also held from 2022 to 2023. In Gauteng, KwaZulu-Natal and the Western Cape, services accounted for 80% of all economic growth in the past two decades. In the rest of the country, the figure was 75%.

The pattern of growth within the services varied substantially between the main metro provinces and the rest of the country. In Gauteng, KwaZulu-Natal and the Western Cape, around half of growth over the past two decades came from business services. Almost a third is derived from professional business services (computing, engineering, legal, accounting, and so on). In the rest of the country, in contrast, half of the growth came from public and social services, led by health and education (see Graph 9).

Graph 9. Services value added by volume in billions of constant (2023) rand by provincial groups, 2003, 2022 and 2023



Note: (a) Mostly security and cleaning. Source: Quantec. EasyData. Standardised regional series. Accessed at www.quantec.co.za in January 2025

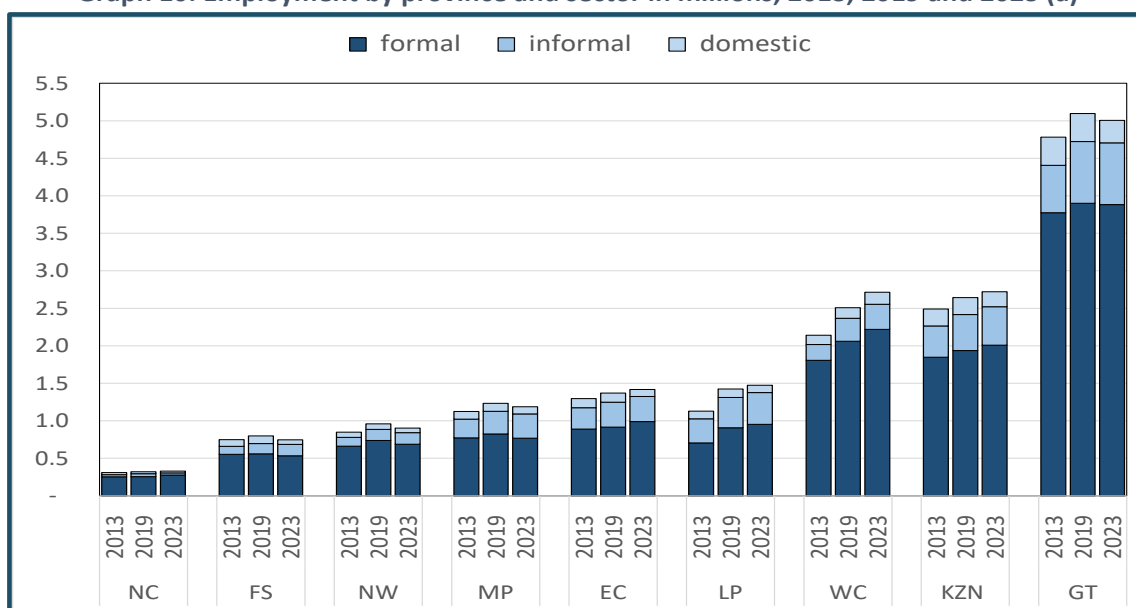
Employment

In the decade to 2023, employment in the Western Cape and Limpopo climbed by over a quarter, while it grew less than 10% in the other provinces, including Gauteng and KwaZulu-Natal. The Free State lost jobs. As a result, although Gauteng maintained its share in national value added, its share in national employment fell from 32% to 30%. The structure of employment generally mirrored the production structure in each province.

According to Statistics South Africa’s Quarterly Labour Force Survey (QLFS), employment in 2023 climbed by 6%, or more than five times as fast as the GDP, with an increase of 7.1% in the non-agricultural formal sector alone. This finding, based on a large household survey, could reflect continued recovery from the pandemic downturn. Still, it contrasted sharply with Statistics South Africa’s Quarterly Employment Survey (QES) of businesses, which found only 3.1% growth in non-agricultural formal employment. Both surveys found that employment growth far exceeded the GDP growth. Since the QES does not break the data down by province, the QLFS data will be used to analyse longer-term trends, which are relatively reliable. The QLFS data also provide insights into provincial employment structures.

As of 2023, only the Western Cape, Limpopo, Mpumalanga and the Eastern Cape had recovered from the pandemic downturn in 2020, according to the QLFS. The other provinces still had lower total employment than in 2019 (see Graph 10).

Graph 10. Employment by province and sector in millions, 2013, 2019 and 2023 (a)

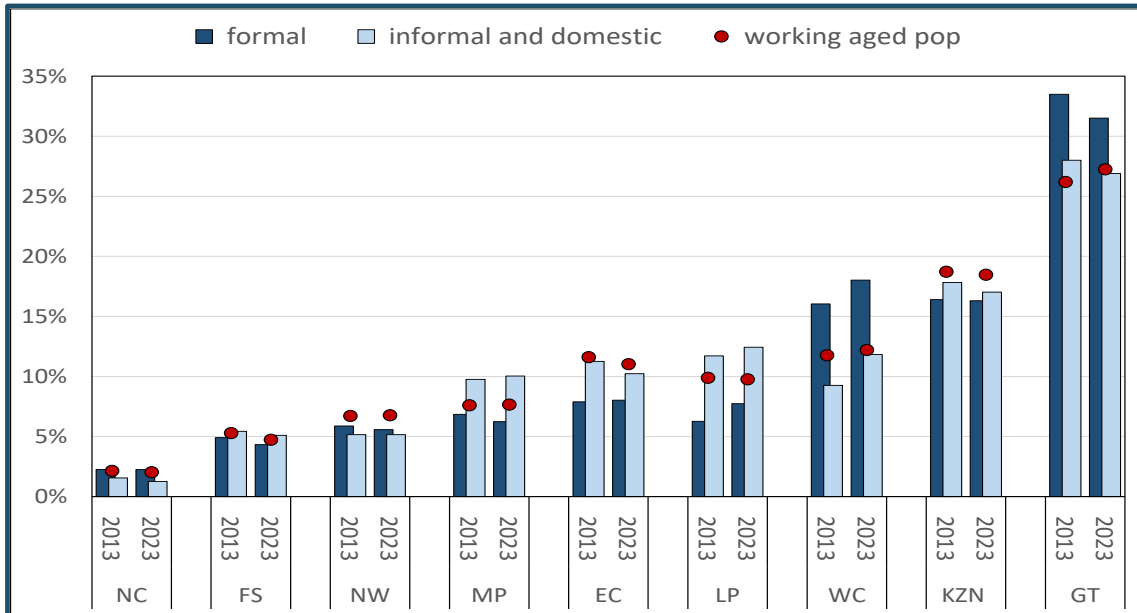


Note: (a) Data are average of four quarters, in line with Statistics South Africa’s methodology for the annual figures in the Labour Market Dynamics databases. *Source:* Calculated from Statistics South Africa. QLFS Trends 2008-2024Q3. Excel spreadsheet. Downloaded from https://www.statssa.gov.za/?page_id=1854&PPN=P0211&SCH=73894 in December 2024.

The Western Cape and Gauteng held a disproportionate share of formal employment. The discrepancy was particularly noticeable for the Western Cape. In 2023, it generated 18% of all formal jobs, although it had only 12% of the working-age population. Its share in formal employment had climbed from 16% in 2013. Gauteng accounted for 32% of formal employment in 2023, compared to 30% of the working-age population. Its share in formal employment had,

however, dropped from 33% in 2013, essentially reflecting its continued dependency on mining-based refining in a period when world prices were largely stagnant. In all the other provinces, the shares of formal and informal employment were both lower than the share in population (see Graph 11). In these provinces, informal jobs accounted for 29% of total employment, compared to 21% in the Western Cape and Gauteng. Generally, informal employment was higher in provinces with significant historic labour-sending regions.

Graph 11. Provincial shares in national formal employment, informal and domestic employment, and the working-age population, 2013 and 2023 (a)

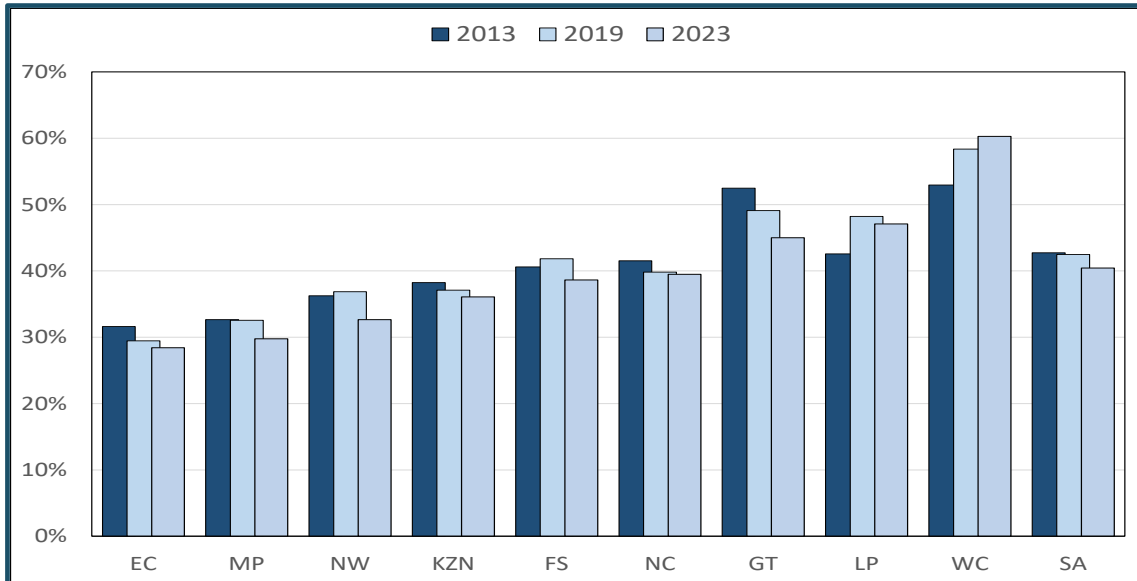


Note: (a) Data are average of four quarters, in line with Statistics South Africa’s methodology for the annual figures in the Labour Market Dynamics databases. Source: Calculated from Statistics South Africa. QLFS Trends 2008-2024Q3. Excel spreadsheet. Downloaded from https://www.statssa.gov.za/?page_id=1854&PPN=P0211&SCH=73894 in December 2024.

While employment in most provinces climbed faster than the GDP over the past decade, it did not keep up with population growth. In 2023, the share of the working-age population with employment returned to levels last seen in 1994. In South Africa, this indicator, known as the employment ratio or the absorption rate, has fluctuated between 40% and 45% since 1994; the international norm is around 60%.

From 2013, the employment ratio declined in every province except the Western Cape (see Graph 12). The drop was particularly sharp in Gauteng, where the share of employment among adults fell from 52% in 2013 to 45% a decade later. The decline reflected both large-scale in-migration from other provinces and relatively slow job growth. In contrast, the employment ratio in the Western Cape exceeded 60% in 2023 – the only province to approach international levels. In part, the Western Cape’s high employment ratio reflected unusually high employment rates from before 1994, with a complete absence of historic labour-sending areas within the province’s territory.

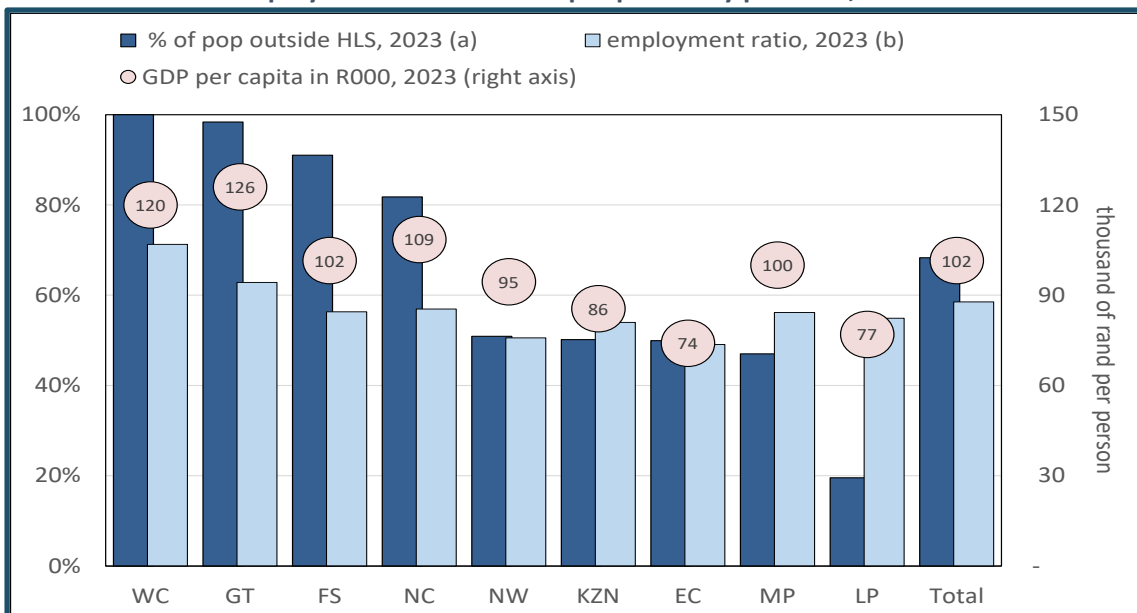
Graph 12. Employment ratio (a) by province, 2013 and 2023



Note: (a) The employment ratio is the share of the population which says it has income-generating employment. Data are the average of four quarters, in line with Statistics South Africa's methodology for the annual figures in the Labour Market Dynamics databases. *Source:* Calculated from Statistics South Africa. QLFS Trends 2008-2024Q3. Excel spreadsheet. Downloaded from https://www.statssa.gov.za/?page_id=1854&PPN=P0211&SCH=73894 in December 2024.

As Graph 13 shows, provinces with a relatively large share of the population in historic labour-sending regions generally have lower employment ratios as well as lower value added per person.

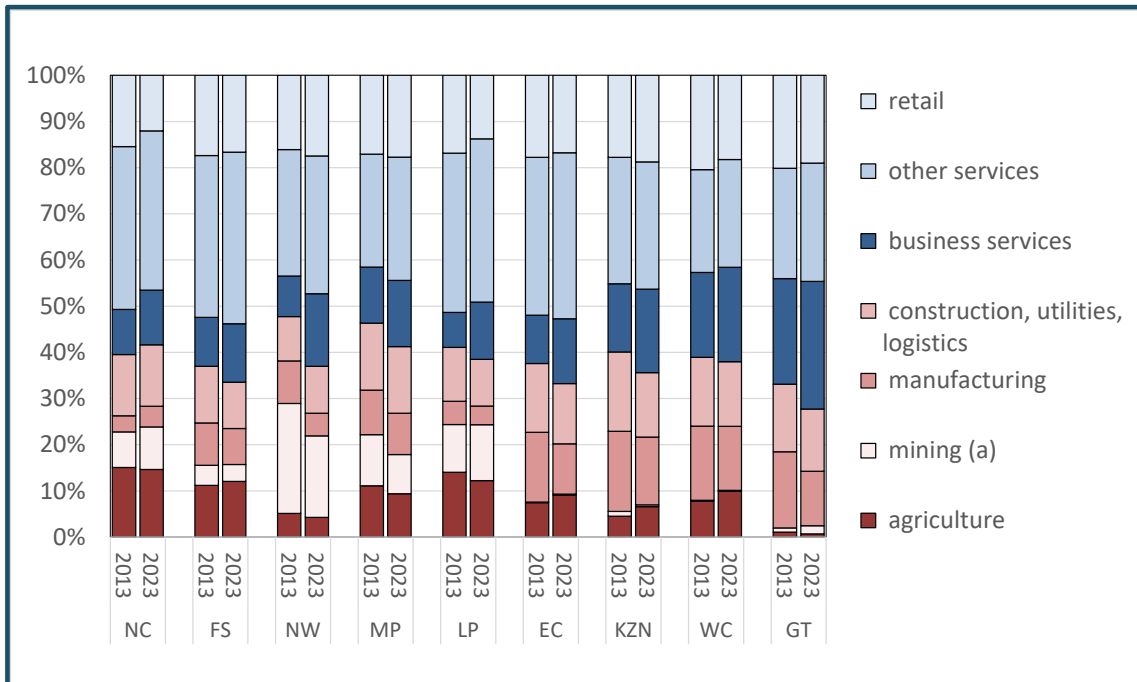
Graph 13. Percentage of population outside of the historic labour-sending regions, employment ratio and GDP per person by province, 2023



Note: (a) Share of population reported as living in “traditional” areas. *Source:* Calculated from Statistics South Africa. Quarterly Labour Force Surveys for 2023. Electronic datasets. Accessed at Nesstar facility at www.statssa.gov.za before January 2024.

The provincial structure of employment was affected by the labour intensity of the dominant industries. Agriculture accounted for 5.5% of national employment and 3% of the GDP, but it contributed 10% of total formal employment in every province except the North West, KwaZulu-Natal and Gauteng. Mining generated 8% or more of formal employment in the Northern Cape, North West, Mpumalanga and Limpopo, but under 4% in the other five provinces, with virtually none in KwaZulu-Natal, the Eastern Cape and the Western Cape. In contrast, manufacturing employment was much more equally distributed than its value added, largely due to the dominance of heavy industry in Gauteng. It ranged from a low of 4% of formal employment in the Northern Cape and the North West to a high of 15% in KwaZulu Natal (see Graph 14).

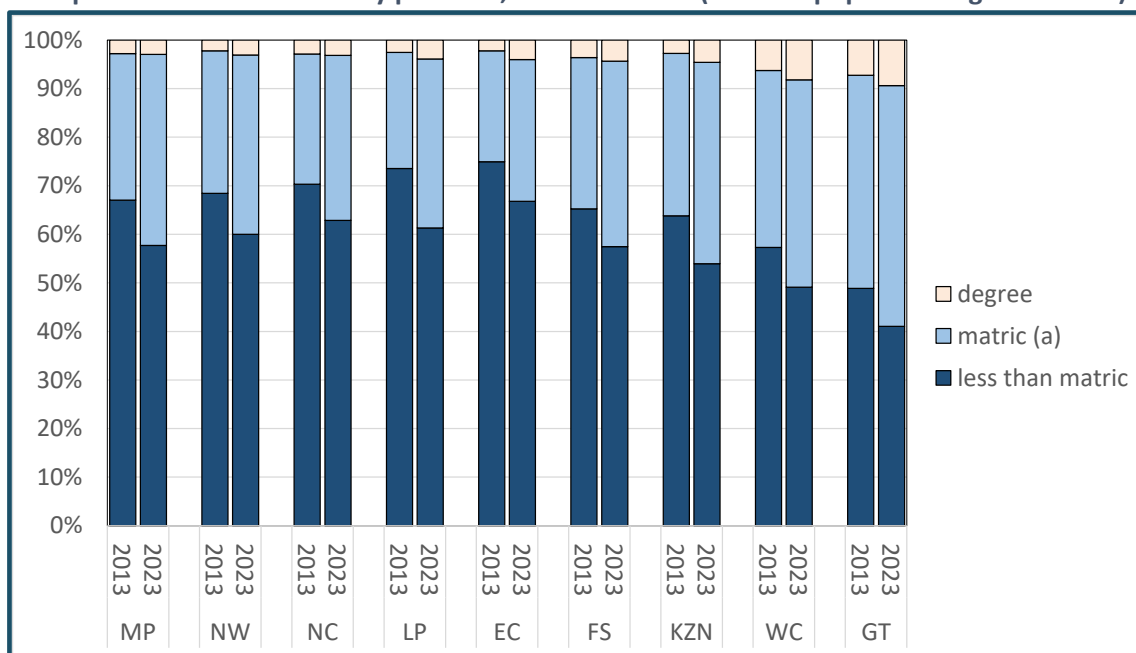
Graph 14. Share of economic sectors in provincial employment, 2013 and 2023 (a)



Note: (a) Mining figures are from DMRE employer surveys, as the household surveys do not capture mining employment well due to its unequal distribution across provinces. *Source:* Except for mining, calculated from Statistics South Africa. QLFS Trends 2008-2024Q3. Excel spreadsheet. Downloaded from https://www.statssa.gov.za/?page_id=1854&PPN=P0211&SCH=73894 in December 2024. For mining, calculated from DMRE. Mineral Statistics. Provincial Annual Employment and Earnings. Accessed via Quantec. EasyData. Interactive dataset. Downloaded from www.quantec.co.za in January 2025.

The provinces had very different levels of education to draw on, in part because better-educated people were more likely to move to the main economic hubs. In Gauteng and the Western Cape, more than 8% of working-aged people had a university degree, and less than half had not achieved matric. In the rest of the country, well over half of adults did not have matric, and the share with a degree ranged from 3% to 5% (see Graph 15).

Graph 15. Education levels by province, 2013 and 2023 (share of population aged 20 to 64)



Note: (a) Includes matric plus a certificate or diploma. Source: Calculated from Statistics South Africa. Labour Market Dynamics, 2013 and 2023, and Quarterly Labour Force Surveys for 2023. Electronic datasets downloaded from Nesstar site at www.statssa.gov.za before January 2025.

Business ownership

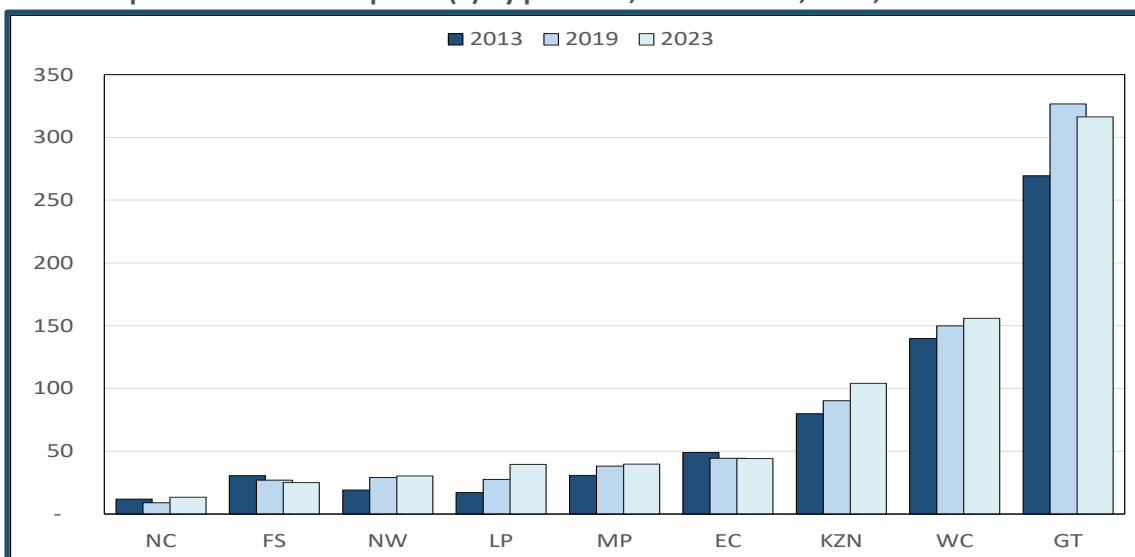
Three quarters of formal small businesses are in Gauteng, KwaZulu-Natal and the Western Cape. Informal business is distributed more in line with the population. The dominance of heavy industry in Gauteng led to a relatively small number of businesses compared to the Western Cape and KwaZulu-Natal. Informal businesses are disproportionately centred on retail, personal services, construction and transport.

According to the QLFS, in 2023 South Africa had a total of 770 000 small businesses, up from 650 000 a decade earlier. Of these, Gauteng housed 41%, down from 44% in 2019. The Western Cape held 20% and KwaZulu-Natal, 14%. A quarter of all formal businesses were in the remaining provinces, whose share ranged from 2% in the Northern Cape to 6% in the Eastern Cape.

The number of small businesses in 2023 was higher than before the pandemic in six provinces; the exceptions were Gauteng, the Eastern Cape and the Free State. The fastest growth in numbers over the past decade emerged in Limpopo, followed by KwaZulu-Natal (see Graph 16).

The distribution of listed companies was even more concentrated in the economic hubs. According to the Who Owns Whom database, in early 2024, 70% of listed South African companies had their headquarters in Gauteng, 25% in the Western Cape, and 6% in KwaZulu-Natal. One was headquartered in Mpumalanga, and none in any other province.

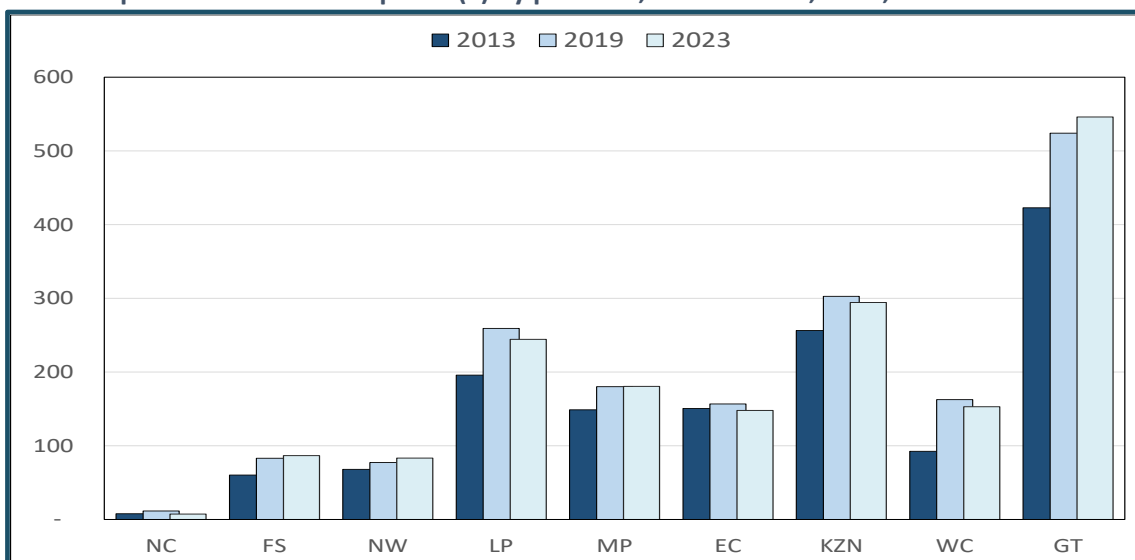
Graph 16. Formal enterprises (a) by province, in thousands, 2013, 2019 and 2023



Note: (a) Calculated as the number of employers and self-employed people in the survey. Formal includes commercial farms. *Source:* Calculated from Statistics South Africa. Labour Market Dynamics, 2013 and 2023, and Quarterly Labour Force Surveys for 2023. Electronic datasets downloaded from Nesstar site at www.statssa.gov.za before January 2025.

In 2023, South Africa had a total of 1.7 million informal businesses, compared to 1.4 million in 2013. The distribution of informal businesses between provinces was more aligned with the population than formal business, as Graph 17 shows. Gauteng was still over-represented, with 30% of informal businesses compared to 24% of the national population. In contrast, the former Cape provinces had a proportionately low share, together holding 18% of informal businesses but 26% of the national population. The share of the other provinces in informal businesses approximated their population share more closely.

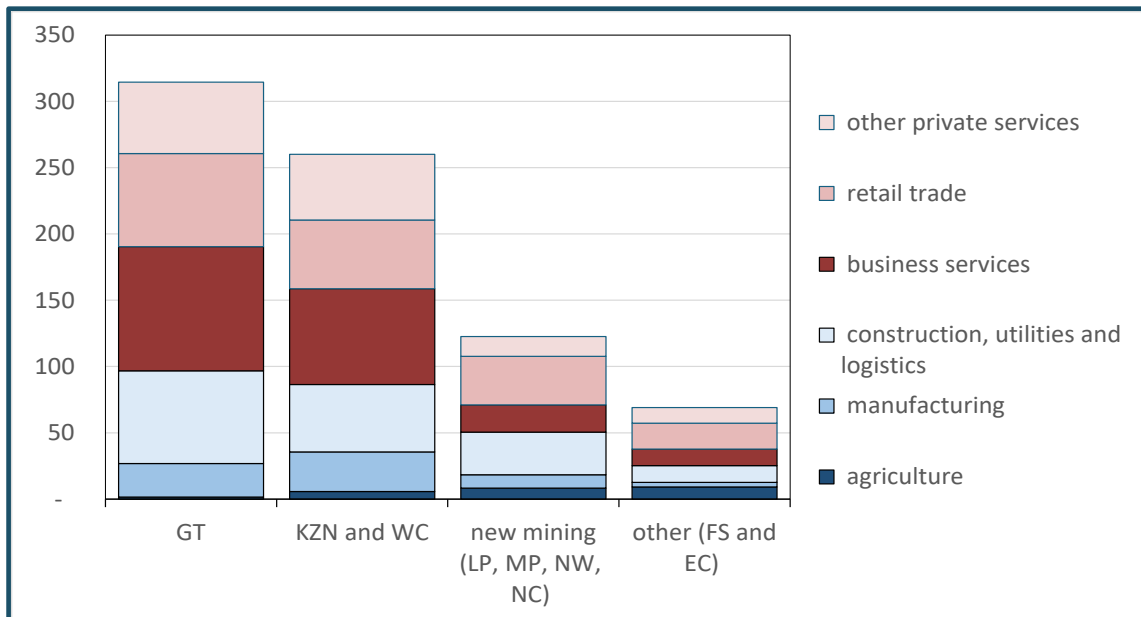
Graph 17. Informal enterprises (a) by province, in thousands, 2013, 2019 and 2023



Note: (a) Calculated as the number of employers and self-employed people in the survey. Formal includes commercial farms. *Source:* Calculated from Statistics South Africa. Labour Market Dynamics, 2013 and 2023, and Quarterly Labour Force Surveys for 2023. Electronic datasets downloaded from Nesstar site at www.statssa.gov.za before January 2025.

Formal business is concentrated in services, construction and transport, with relatively few in manufacturing. The share of business services is particularly large in Gauteng, the Western Cape and KwaZulu-Natal. Retail is more strongly represented in the other provinces. (Graph 18)

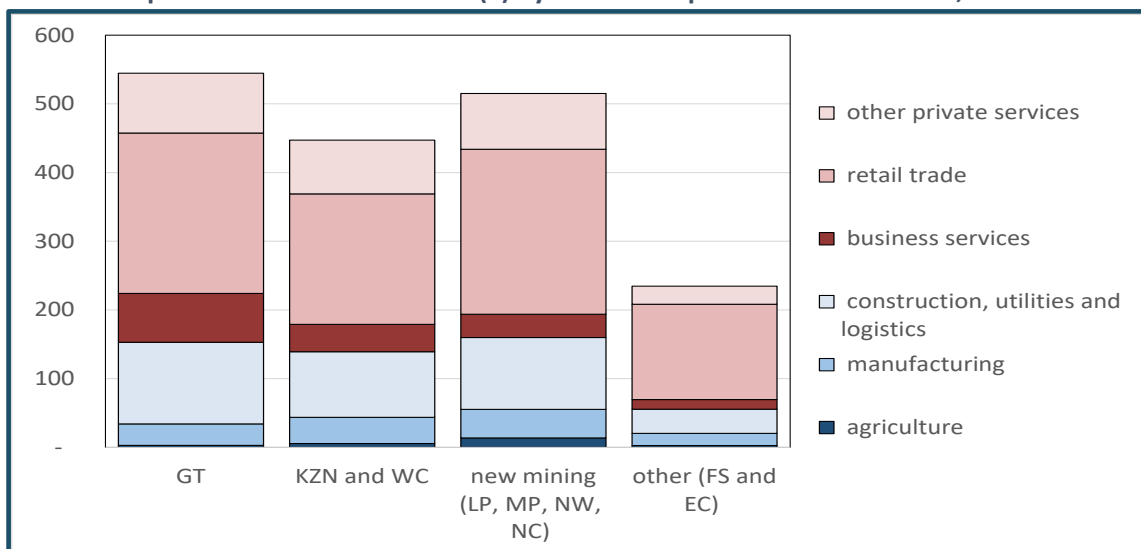
Graph 18. Formal businesses (a) by sector and province in thousands, 2023



Note: (a) Calculated as the number of formal employers and self-employed people in the survey. *Source:* Calculated from Statistics South Africa. Quarterly Labour Force Surveys for 2023. Electronic datasets downloaded from Nesstar site at www.statssa.gov.za before January 2025.

The share of retail in informal businesses ranged from almost 45% in the provinces with major metros to 60% in the Free State and Eastern Cape. Construction and logistics formed the second largest sector in every province, although it was relatively small in the Free State and Eastern Cape (see Graph 19).

Graph 19. Informal businesses (a) by sector and province in thousands, 2023



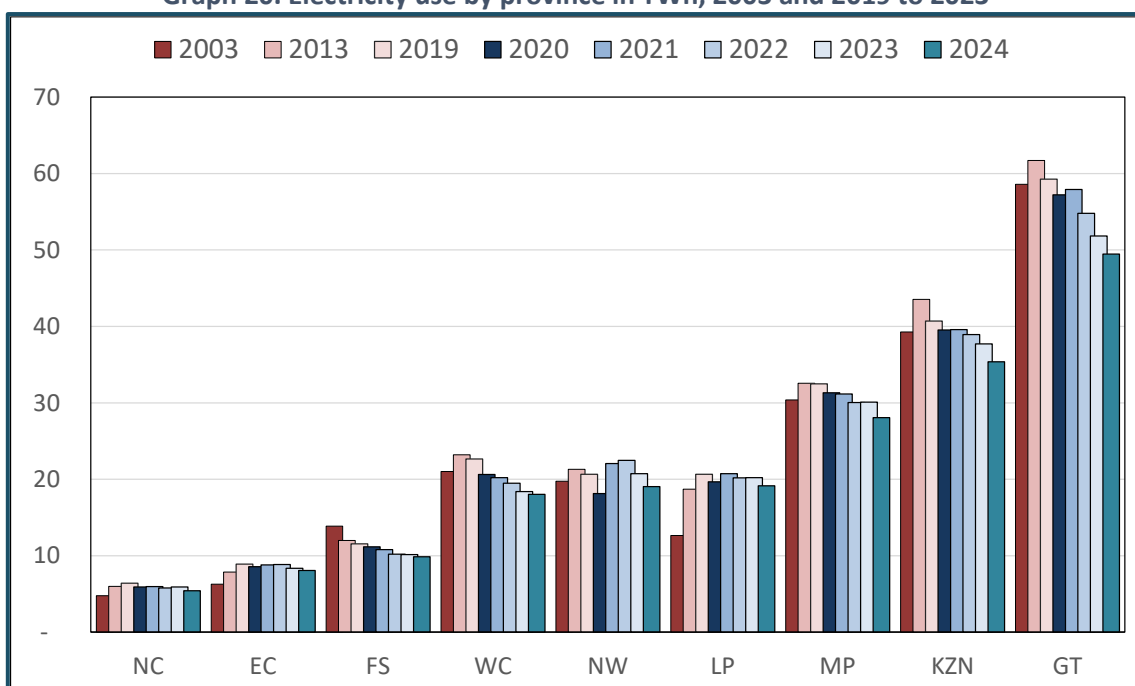
Note: (a) Calculated as the number of formal employers and self-employed people in the survey. *Source:* Calculated from Statistics South Africa. Quarterly Labour Force Surveys for 2023. Electronic datasets downloaded from Nesstar site at www.statssa.gov.za before January 2025.

Infrastructure

Major challenges with network infrastructure emerged in 2023, but the impact by province varied. Loadshedding and higher prices for grid electricity saw a decline in use in most provinces, while disruptions at Transnet had a particularly harsh impact on the coal mines in Mpumalanga. Generally, shortfalls in household infrastructure continued to reflect the inequalities entrenched under apartheid.

As Graph 20 shows, electricity use declined in every province from 2013. The drop was sharpest in Gauteng, where it accelerated from 2020. In South Africa, most electricity is used in industry, with a particularly high share going to the metals refineries, including the aluminium refineries in KwaZulu-Natal. Loadshedding in 2023 accelerated the decline in electricity use, with a further sharp fall in 2024. In particular, many businesses shifted to off-grid electricity, reducing demand for grid energy.

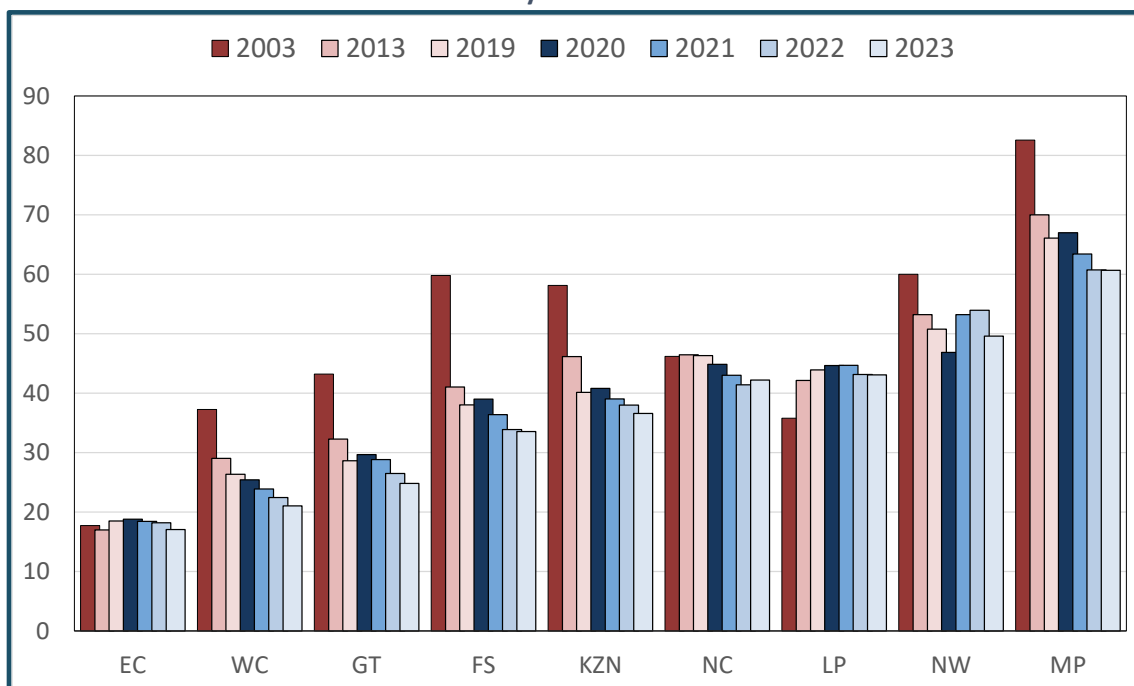
Graph 20. Electricity use by province in TWh, 2003 and 2019 to 2023



Source: Calculated from Statistics South Africa. Electricity generated and available for distribution November 2025. Excel table from 2000. Downloaded from www.statssa.gov.za in February 2025.

Since the GDP was growing while grid electricity use was falling, the electricity intensity of the GDP – that is, grid electricity used per million rand of value added – fell in every province. The rate of change varied significantly, however. It dropped relatively slowly in the mining-dependent provinces, with the exception of Mpumalanga (see Graph 21). The shift reflected the combination of the move to services rather than goods production, especially heavy industry in Gauteng; rapidly rising prices for Eskom electricity from 2008; and increased loadshedding. The result was both reduced use of electricity and growing reliance on off-grid generation.

Graph 21. KWh per million constant (2023) rand (a) by province, 2003, 2015, and annually from 2019 to 2023

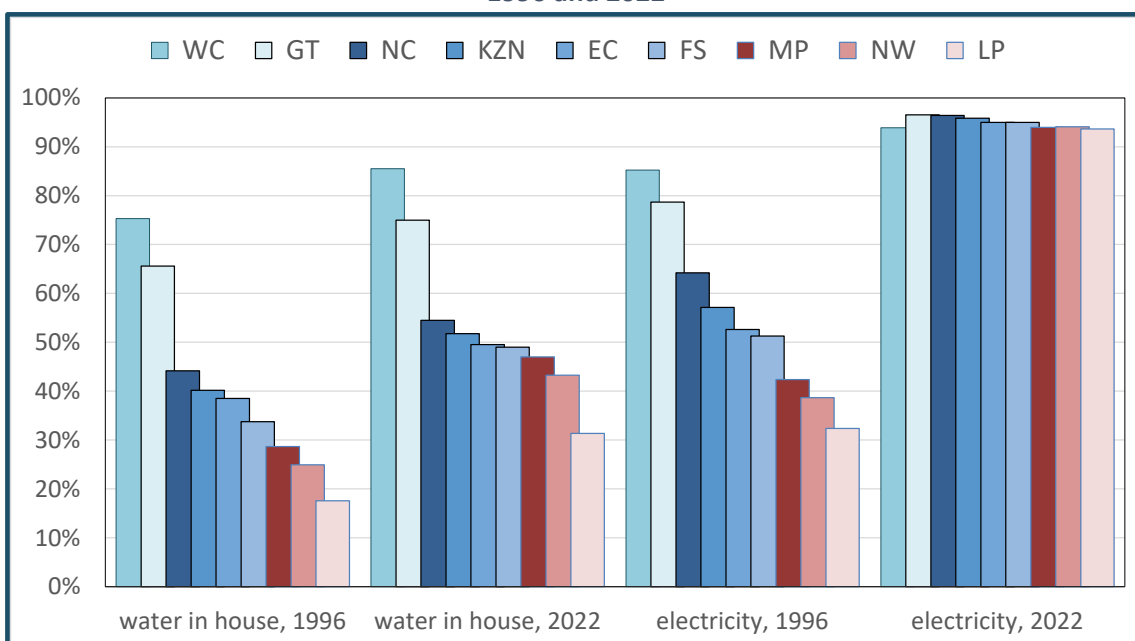


Note: (a) Refflated with implicit deflator. *Source:* Calculated from Statistics South Africa. Electricity generated and available for distribution November 2025. Excel table from 2000, and Electricity generated and available for distribution November 2025. Excel table from 2000. Downloaded from www.statssa.gov.za in February 2025.

Overall, the tonnage of freight carried by Transnet rail dropped by 23 million tonnes from 2022 to 2023, following a fall of 62 million over the previous two years. As a result, in 2023 Transnet carried 35% less freight than in 2020. The reasons included problems with the supply and maintenance of locomotives and the theft of copper cables on a mass scale. Neither Transnet nor Statistics South Africa published figures for freight transport by province. Still, the impact was particularly severe for mines because they cannot easily shift to road freight. Shipments of coal dropped by 37% from 2020 to 2023; iron ore shrank by 15%; and general freight by 46%. From 2022 to 2023 alone, coal and general freight shrank just over 15% and iron ore by 6%. Most of the iron ore comes from the Northern Cape, and 85% of coal from Mpumalanga.

Ultimately, the disparities in infrastructure between the provinces that encompass historic labour-sending regions and the rest of the country remain significant, despite improvements since 1994. Access to water and electricity indicates the challenges. As Graph 22 shows, the catch up of electricity for lighting is nearly complete. Progress on providing piped water in homes has been far slower in the historically deprived provinces.

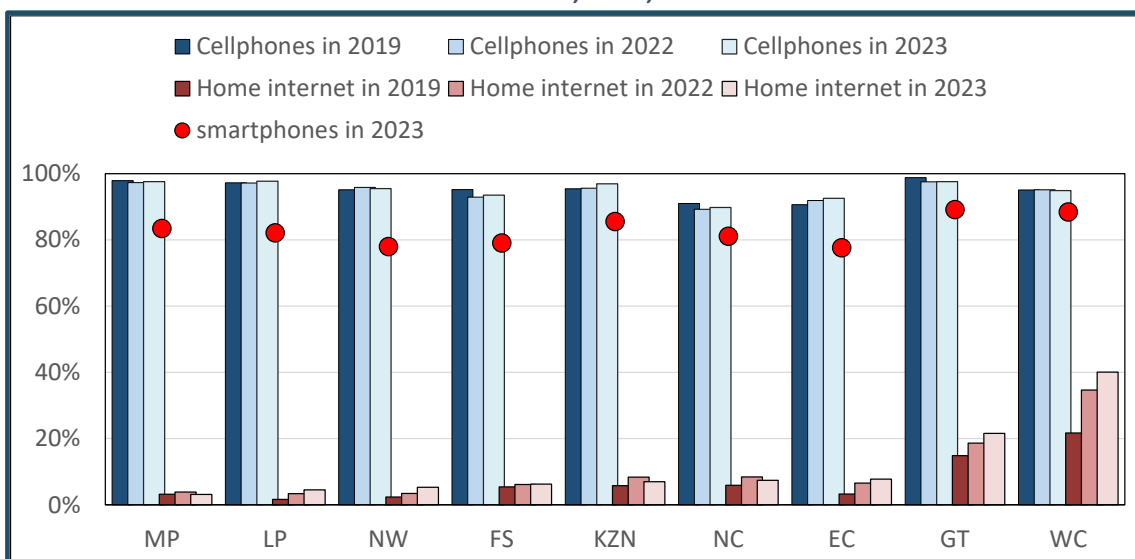
Graph 22. Access to piped water at home and to electricity for lighting by province, 1996 and 2022



Source: Calculated from Statistics South Africa. National Census Data for 1996 and 2022. Accessed at SuperWeb facility at www.statssa.gov.za in January 2025.

Access to broadband showed a similar pattern, although the use of cellphones closed some of the gaps. In 2023, 40% of households in the Western Cape had internet at home, as did 20% of those in Gauteng. In the rest of the country, the figure was under 10%. While nine out of 10 households had cellphones in every province, the share with smartphones was under 80% in the Eastern Cape, Free State and the North West. It exceeded 85% only in the Western Cape and Gauteng (see Graph 23).

Graph 23. Share of households with access to cellphones, smartphones and internet at home, 2019, 2022 and 2023



Source: Calculated from Statistics South Africa. General Household Surveys for relevant years. Interactive databases. Accessed at Nesstar facility at www.statssa.gov.za before January 2025.