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Measure digital inclusion by what people can do online

Expanding high-speed broadband internet coverage tells policymakers nothing about who can afford to get online, has the skills to use digital services and how to turn access into better prospects

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South Africa has made substantial progress in connecting people to the internet. Mobile broadband coverage is close to universal, and internet access has risen steadily to cover around 85% of the population, according to Stats SA's latest General Household Survey.

But this figure masks extreme unevenness in access and use, with large numbers of people, as the pandemic highlighted, unable to engage meaningfully in an increasingly digitised economy.

Data from Research ICT Africa's **After Access survey** shows that access to a mobile signal does not guarantee access to the internet. For those not connected, the cost of a smart device and a lack of awareness of the internet are the main barriers.

But even many of those connected cannot afford enough data to meet their requirements while a significant number of people, despite having a smart device, are limited by a lack of skills for using online services.

The test of digital policy should be whether people can use an internet connection to improve their prospects. If we cannot answer that question, we cannot tell how widely the benefits of digital technology are shared.

This matters especially for a country seeking faster growth, more jobs, and better living standards. Digital technology can open doors, but only if people have the means to use it optimally.

Our recent research note for the Bureau for Economic Research (BER), ***Measuring what matters: Digital inclusion and South Africa's growth and development agenda***, argues

that the challenge is no longer simply to extend networks. It is to ensure that people and businesses can participate meaningfully in the digital economy.

Building networks, expanding spectrum, and lowering data prices remain essential. But connectivity alone is an inadequate measure of progress. While South Africa may pride itself on having one of the highest internet-penetration rates on the continent, aggregate statistics mask important gaps (see below).

Key statistics on digital inclusion in South Africa

- **Household internet access has expanded sharply:** The share of households with at least one member using the internet rose from 28% in 2010 to 85.6% in 2025, but only 20.6% had fixed internet access at home in 2025.
- **Large differences persist between cities:** Household internet access ranges from 95.5% in Cape Town to just 56.3% in Buffalo City.
- **The rural–urban divide is narrowing but remains substantial:** The gap in internet use fell from 45 percentage points in 2018 to 23 percentage points in 2022.
- **Device ownership does not guarantee business use:** While 65% of surveyed South African microenterprises own a smartphone, only 38% use the internet for business.

The problem is that while a household may have internet access, some members may lack a device of their own; a person may use a phone for messaging but lack the data, equipment or confidence to complete an online course or apply online for work; and a small business may own a smartphone but still not be able to use the internet to reach customers or manage its operations.

In the recent medium-term budget, the National Treasury allocated R150 million to the MyMzansi app, the planned single digital platform for accessing government services which forms part of the government's wider digital transformation programme under Operation Vulindlela. The funding is to enable the CSIR to support the Presidency's digital services unit to "develop, implement and operationalise the MyMzansi platform and associated digital infrastructure".

But true digital inclusion means being able to use digital services (including government services) in ways that create practical economic and social gains. To realise the promise of digital public infrastructure like MyMzanzi, the demand-side constraints on digital development must also be addressed.

Better data, better policy

To truly support South Africa's digital transformation programme, South Africa needs to look more carefully at how it measures digital progress. Household surveys may record access without showing what household members actually use the internet for. Mobile subscription figures can double-count multiple SIM cards belonging to one person, so even penetration rates above 100% do not necessarily mean that everyone is connected.

These measures tell us about the reach of telecommunications networks, but much less about who is excluded, and why.

Without better information, policymakers cannot reliably determine what prevents people from participating digitally, or whether public interventions, such as the envisioned MyMzansi platform, are making a difference or can be optimised for all citizens. A programme may expand infrastructure without overcoming the obstacles that prevent people from using it.

This is why our research calls for regular, detailed surveys that follow international statistical standards and reveal how internet use differs across people and places. In an increasingly digital economy, understanding how formal and informal businesses use digital technology (including AI) or what prevents them from doing so is critical.

The aim should be to identify the most important barriers and direct public resources to the precise intervention points needed to overcome them.

Digital inclusion is everyone's business.

Telecommunications policy alone cannot tackle these barriers. Communications authorities can influence network access, competition and prices, but education and employment, as well as economic development, labour policy, small-business support and public services, all have a role to play.

Without coordination, weaknesses in one area can undermine progress in another. The gains from digitising government services, like reducing the time and cost of dealing with government, will be limited if people cannot afford data or lack the skills to access it.

MyMzansi, once launched, should not be judged simply by whether it is available. We should be asking: Can citizens with limited disposable income or low digital skills successfully complete transactions? How much time and money does it save? And perhaps most importantly, who is still being left out? These are better measures of whether digital reform is delivering public value.

In short, South Africa needs to link investment in digital infrastructure to a broader digital development strategy, allocate resources to demand-side constraints, and clearly articulate responsibilities across the whole of government. This requires reliable evidence of whether citizens' lives are improving as a result.

In short, the test of digital progress is not how many people live within reach of a signal, but whether they can translate that connection into opportunity. For a country seeking to accelerate growth and development, that is the measure of digital inclusion to prioritise.

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*This is an edited version of the BER research note, **"Measuring what matters: Digital inclusion and South Africa's growth and development agenda".***

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