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1. Introduction

This publication presents estimates in respect of the post and telecommunications industry, 2022. The survey aims to provide financial, production, employment and related information for the post and telecommunications industry in South Africa.

The last survey was conducted in 2019 (Report No.: 75-01-01 (2019)).

The statistical unit for the collection of the information is known as an enterprise, operating as a single business unit under a manager.

1.1 Objectives of the survey

- To generate information on the size, structure and nature of the industry.
- To provide data to be used for benchmarking and reconciliation of Statistics South Africa's (Stats SA) surveys, e.g. the gross domestic product (GDP) and the producer price index (PPI).
- To provide data for monitoring the performance and contribution of the industry to the South African economy and the effectiveness of industry policies, and for private sector users in analyses of comparative business and industry performance.

1.2 Scope and coverage

The 2022 post and telecommunications industry survey covers enterprises registered for value-added tax (VAT) that are mainly engaged in the following activities classified according to the January 1993 edition of the *Standard Industrial Classification of All Economic Activities* (SIC), Fifth edition, Report No. 09-90-02:

- national postal activities (SIC 7511);
- courier activities other than national postal activities (SIC 7512); and
- telecommunications (SIC 7520).

The following activities are excluded:

- retail traders selling airtime cards, sim cards and cellular phones and accessories (SIC 62399);
- dissemination of information through websites (SIC 86400);
- television and internet public-pay management services (SIC 88140);
- satellite car tracking services for security purposes (SIC 88920); and
- production of radio and television programmes whether or not combined with broadcasting (SIC 96130).

1.3 Data items

The following categories of data items were collected: industrial classification, details of employment, trading income, expenditure, profit or loss, inventories, capital expenditure on new assets, details of purchases, details of the client base, details of sales of goods, details of services rendered, employment, salaries and wages, and information and communication technology usage.

1.4 Reference period

The questionnaires were completed for the financial year of the enterprise which ends on any date between 1 July 2021 and 30 June 2022, according to the usual reporting schedule of the enterprise. The data for the number of employees were provided for employees who received salaries and wages for the last pay period ended on or before 30 June 2022.

1.5 Current prices

The rand values are at current prices.

1.6 Reliability of data

The following are some of the likely sources of non-sampling errors: frame not up to date, incorrect definitions and classifications, phrasing of questions, non-response, processing and estimation. Every effort is made to minimise non-sampling errors by updating the frame, careful design of questionnaires, testing them with a sample of respondents, editing reported data and implementing efficient operating procedures. Non-sampling errors occur in both sample surveys and censuses.

1.7 Confidentiality

According to Section 17 of the Statistics Act, 1999 (Act No. 6 of 1999), completed questionnaires remain confidential to Stats SA. Individual business information is never disclosed. Results are presented in aggregated form only.

2. Summary of findings

2.1 Income

Table A – Income in the post and telecommunications industry, 2013–2022

Type of service	2013		2016		2019		2022	
	R million	% contribution	R million	% contribution	R million	% contribution	R million	% contribution
Post and associated courier activities	12 208	4,6	13 936	4,5	17 515	4,7	23 997	6,1
Telecommunications	252 819	95,4	294 882	95,5	352 536	95,3	368 193	93,9
Total	265 027	100,0	308 818	100,0	370 051	100,0	392 190	100,0

The total income for the post and telecommunications industry in 2022 was R392,2 billion. The total income represents an increase of 2,0% per annum compared with the income reported in the corresponding survey of 2019 (R370,1 billion). The largest contributor to the total industry income was 'telecommunications' (contributing 93,9%).

Table B – Concentration ratios (relative contributions of large enterprises) in the post and telecommunications industry, 2013–2022

Concentration ratio	2013		2016		2019		2022	
	%							
CR5		59,5		57,2		54,6		55,6
CR10		74,2		73,1		69,2		70,5
CR20		86,6		85,9		80,4		82,2
CR50		94,8		93,3		90,2		90,2
CR100		97,9		96,3		94,2		93,7

In 2022, the top 100 enterprises (CR100) in the post and telecommunications industry contributed 93,7% to the total income. Between 2013 and 2022, the concentration ratios of the top 5, 10, 20, 50 and 100 enterprises were the highest in 2013 at 59,5%; 74,2%; 86,6%; 94,8%; and 97,9% respectively. The concentration ratios of the top 5, 10 and 20 enterprises were the lowest in 2019 at 54,6%; 69,2%; and 80,4% respectively.

Table C – Profit margins in the post and telecommunications industry, 2013–2022

Type of service	Turnover				Net profit/loss after tax				Profit margin			
	2013	2016	2019	2022	2013	2016	2019	2022	2013	2016	2019	2022
	R million				R million				%			
Post and associated courier activities	11 039	12 673	16 093	21 810	-543	-983	-912	-2 163	-4,9	-7,8	-5,7	-9,9
Telecommunications	242 499	284 369	340 854	348 138	11 511	15 745	12 248	35 888	4,7	5,5	3,6	10,3
Total	253 538	297 042	356 947	369 948	10 968	14 762	11 336	33 725	4,3	5,0	3,2	9,1

The profit margin in the post and telecommunications industry in 2022 was 9,1%. The profit margin for the four periods shown was the lowest in 2019 at 3,2%. In 2022, 'post and associated courier activities' and 'telecommunications' had profit margins of -9,9% and 10,3% respectively.

Between 2013 and 2022, 'telecommunications' recorded the highest profit margin of 10,3% in 2022.

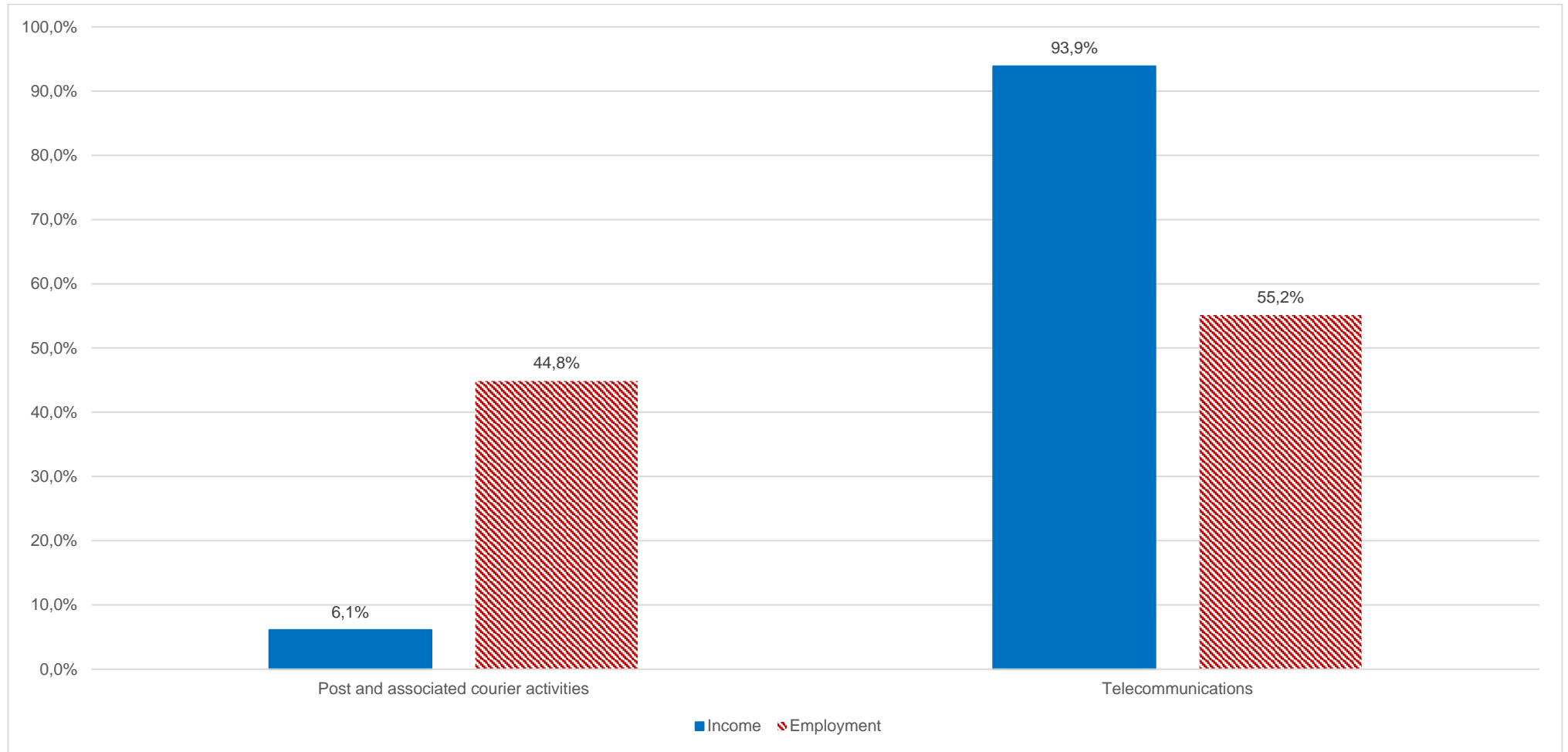
2.2 Employment

Table D – Employment in the post and telecommunications industry for the last pay day period ended on or before 30 June, 2013–2022

Type of service	2013		2016		2019		2022	
	Number	%	Number	%	Number	%	Number	%
Post and associated courier activities	37 047	35,8	30 710	30,6	34 301	36,1	39 687	44,8
Telecommunications	66 408	64,2	69 692	69,4	60 820	63,9	48 805	55,2
Total	103 455	100,0	100 402	100,0	95 121	100,0	88 492	100,0

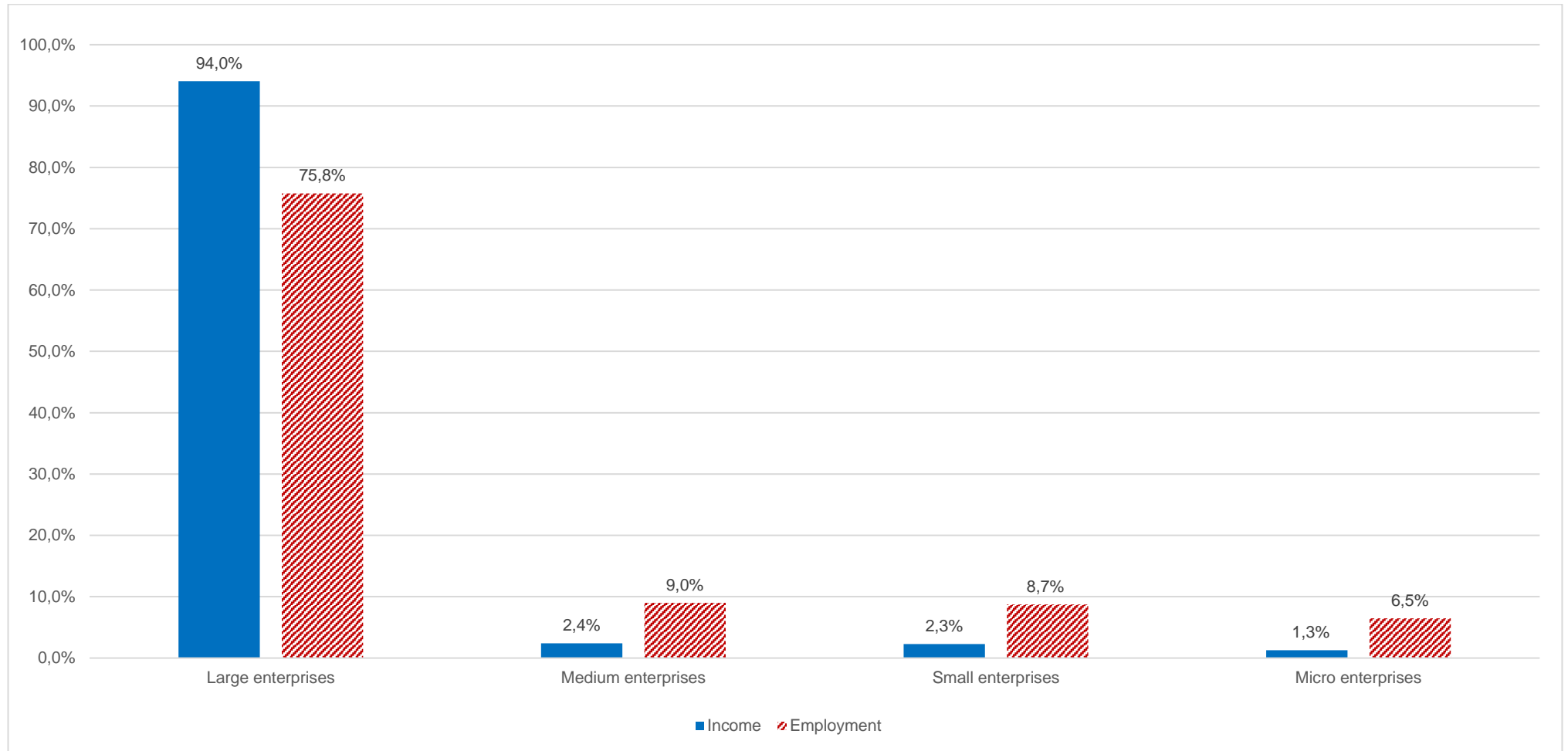
The total number of persons employed in the post and telecommunications industry as at the end of June 2022 was 88 492. This represents a decrease of 2,4% per annum compared with the employment recorded in 2019 (95 121 persons). Between 2013 and 2022, employment decreased from 103 455 to 88 492 (a loss of 14 963 jobs). The major contributor to the decline in employment was 'telecommunications' (a loss of 17 603 jobs).

Figure 1 – Income and employment by type of service (percentage contribution) in the post and telecommunications industry, 2022



The type of service with the highest proportion of employment compared with its proportion of income was 'post and associated courier activities' (contributing 44,8% to employment and 6,1% to income).

Figure 2 – Income and employment by enterprise size (percentage contribution) in the post and telecommunications industry, 2022



Large enterprises (those with an annual turnover greater than R156 million) contributed 94,0% to the total income of the post and telecommunications industry while their contribution to employment was 75,8%. Compared with their contribution to total income of 6,0%, SMMEs (small, medium and micro enterprises) contributed a substantially higher 24,2% to total employment in the post and telecommunications industry.

Table E – Average salaries and wages in the post and telecommunications industry, 2013–2022

Type of service	2013			2016		
	Salaries and wages	Total employment	Average salaries and wages	Salaries and wages	Total employment	Average salaries and wages
	R million	Number	Rand	R million	Number	Rand
Post and associated courier activities	5 670	37 047	153 049	6 472	30 710	210 746
Telecommunications	25 284	66 408	380 737	28 139	69 692	403 762
Total	30 954	103 455	299 203	34 611	100 402	344 724

Table E – Average salaries and wages in the post and telecommunications industry, 2013–2022 (concluded)

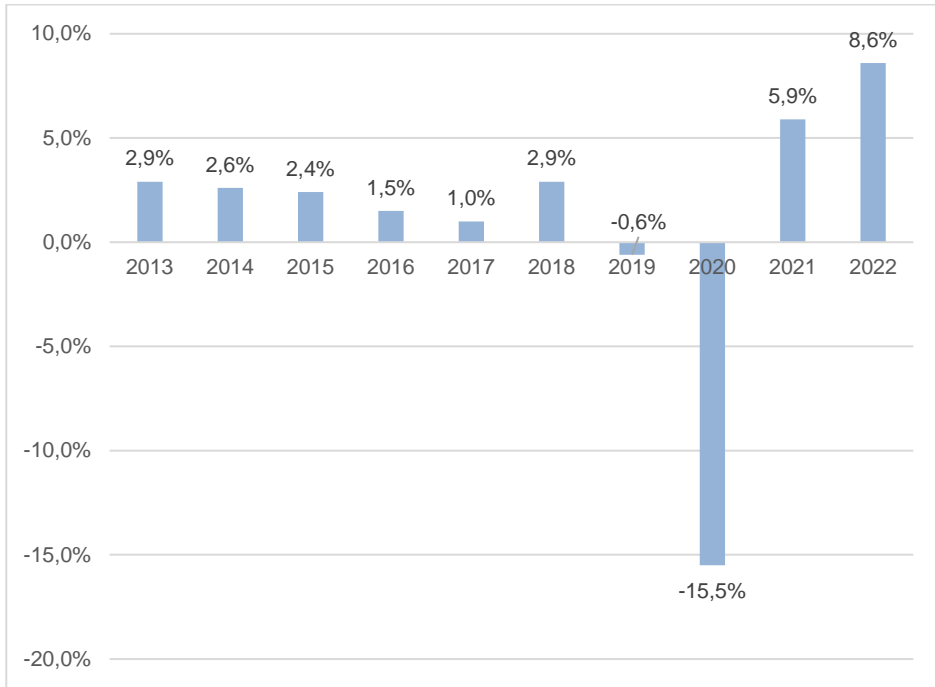
Type of service	2019			2022		
	Salaries and wages	Total employment	Average salaries and wages	Salaries and wages	Total employment	Average salaries and wages
	R million	Number	Rand	R million	Number	Rand
Post and associated courier activities	7 412	34 301	216 087	8 656	39 687	218 107
Telecommunications	26 220	60 820	431 108	25 787	48 805	528 368
Total	33 632	95 121	353 571	34 443	88 492	389 222

The average salaries and wages in the post and telecommunications industry in 2022 was R389 222. The type of service with the highest average salaries and wages in 2022 was 'telecommunications' (R528 368).

Total average salaries and wages increased from R353 571 in 2019 to R389 222 in 2022.

2.3 Value added

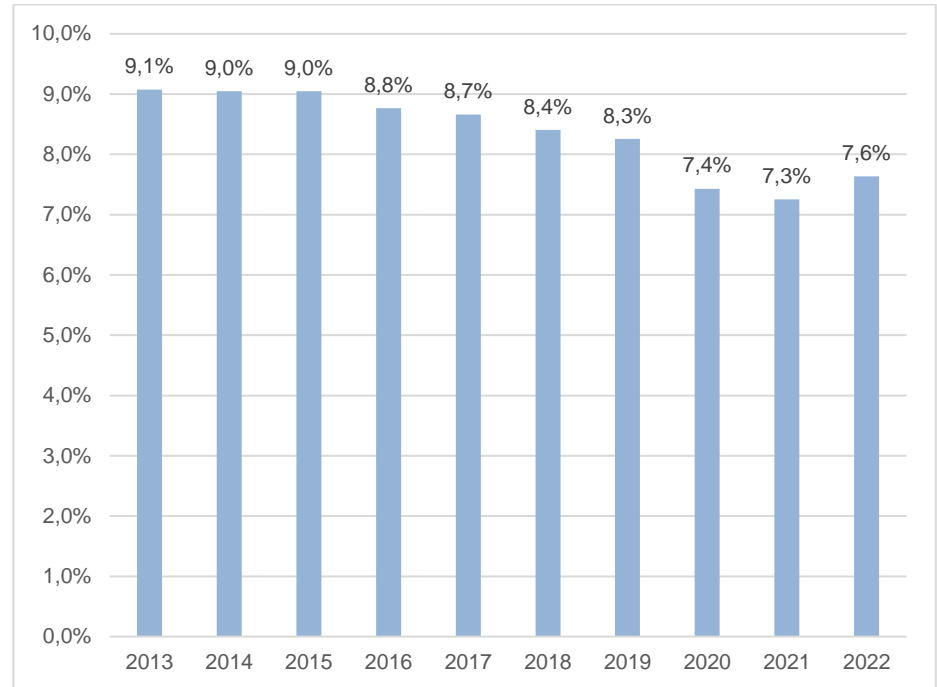
Figure 3 – Transport, storage and communication industry value added, annual percentage change (constant 2015 prices), 2013–2022



Source: P0441

The annual growth rate in the transport, storage and communication industry increased from -15,5% in 2020 to 8,6% in 2022, based on value added at constant prices.

Figure 4 – Percentage contribution of the transport, storage and communication industry to total value added (current prices), 2013–2022



Source: P0441

The contribution of the transport, storage and communication industry to total value added fell from 9,1% in 2013 to 7,6% in 2022.

2.4 Details of services**Table F – Details of income from services in post and associated courier activities, 2019–2022**

Type of service	2019		2022		Annualised % change
	R million	% contribution	R million	% contribution	
International, domestic and fast mail services	2 177	14,1	1 262	5,8	-16,6
Box rental services	300	1,9	169	0,8	-17,4
Income from financial and agency services	1 555	10,0	1 234	5,7	-7,4
Same-day and next-day/overnight delivery services	4 475	28,9	7 032	32,3	16,3
Economy delivery services, two days or more	3 996	25,8	6 787	31,2	19,3
Other postal and courier services	2 985	19,3	5 292	24,3	21,0
Total income from services rendered	15 488	100,0	21 776	100,0	12,0

Income from post and associated courier activities in 2022 was R21,8 billion. The income represents an increase of 12,0% per annum compared with the income reported in the corresponding survey of 2019 (R15,5 billion). The largest contributor was 'same-day and next-day/overnight delivery services' (R7,0 billion or 32,3%), followed by 'economy delivery services, two days or more' (R6,8 billion or 31,2%).

Table G – Details of income from services in telecommunications, 2019–2022

Type of service	2019		2022	
	R million	% contribution	R million	% contribution
Telecommunications services through fixed lines (including fixed-mobile)	14 466	4,8	11 106	3,6
Telecommunications services through mobile lines	160 679	53,7	163 110	53,3
Data transmission services	5 347	1,8	5 401	1,8
Internet telecommunications access services	17 335	5,8	18 826	6,2
Interconnection services to customers	16 570	5,5	13 988	4,6
Subscriptions, licence fees and content income	26 803	9,0	26 776	8,8
Advertising airtime income except on commission	9 531	3,2	9 052	3,0
Other telecommunication and broadcasting services	8 682	2,9	8 454	2,8
Other services rendered	39 963	13,3	48 567	15,9
Total income from services rendered	299 376	100,0	305 280	100,0

Income from telecommunications services in 2022 was R305,3 billion. The income represents an increase of 0,7% per annum compared with the income reported in the corresponding survey of 2019 (R299,4 billion). The largest contributor was income from 'telecommunications services through mobile lines' (R163,1 billion or 53,3%).

2.5 Capital expenditure on new assets

Table H – Capital expenditure on new assets in the post and telecommunications industry, 2016–2022

Type of service	2016		2019		2022	
	R million	% contribution	R million	% contribution	R million	% contribution
Post and associated courier activities	419	1,2	467	1,3	808	1,9
Telecommunications	33 750	98,8	35 315	98,7	40 791	98,1
Total	34 169	100,0	35 782	100,0	41 599	100,0

Note: Capital expenditure was not collected in 2013.

The capital expenditure on new assets in 2022 was R41,6 billion, representing an increase of 5,1% per annum compared with the expenditure reported in 2019 (R35,8 billion). The largest contributor to capital expenditure on new assets was 'telecommunications' (R40,8 billion or 98,1%).

Total capital expenditure on new assets increased from R34,2 billion in 2016 to R41,6 billion in 2022, a difference of R7,4 billion.



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3. Tables

Table 1 – Principal statistics in the post and telecommunications industry, 2019 and 2022

Period	Total income	Total expenditure	Total value of opening inventory	Total value of closing inventory	Net profit/loss before tax	Capital expenditure on assets	Number of employees
	R million						Number
2019 ¹	370 051	344 555	7 078	8 103	26 521	35 782	95 121
2022 ²	392 190	348 273	5 938	6 619	44 598	41 599	88 492
Annualised % change	2,0	0,4	-5,7	-6,5	18,9	5,1	-2,4

¹ Revised figures.

² Preliminary figures.

Table 2 – Principal statistics by type of service in the post and telecommunications industry, 2019 and 2022

Type of service	Total income			Total expenditure			Total value of opening inventory			Total value of closing inventory		
	2019 ¹	2022 ²	Annualised % change	2019 ¹	2022 ²	Annualised % change	2019 ¹	2022 ²	Annualised % change	2019 ¹	2022 ²	Annualised % change
	R million			R million			R million			R million		
Post and associated courier activities	17 515	23 997	11,1	18 301	25 935	12,3	68	87	8,6	66	74	3,9
Telecommunications	352 536	368 193	1,5	326 254	322 338	-0,4	7 010	5 851	-5,8	8 037	6 545	-6,6
Total	370 051	392 190	2,0	344 555	348 273	0,4	7 078	5 938	-5,7	8 103	6 619	-6,5

¹ Revised figures.

² Preliminary figures.

Table 2 – Principal statistics by type of service in the post and telecommunications industry, 2019 and 2022 (concluded)

Type of service	Net profit/loss before tax			Capital expenditure on assets			Total employees		
	2019 ¹	2022 ²	Annualised % change	2019 ¹	2022 ²	Annualised % change	2019 ¹	2022 ²	Annualised % change
	R million			R million			Number		
Post and associated courier activities	-788	-1 951	35,3	467	808	20,1	34 301	39 687	5,0
Telecommunications	27 309	46 549	19,5	35 315	40 791	4,9	60 820	48 805	-7,1
Total	26 521	44 598	18,9	35 782	41 599	5,1	95 121	88 492	-2,4

¹ Revised figures.² Preliminary figures.**Table 3 – Profit margin in the post and telecommunications industry, 2019 and 2022**

Type of service	Turnover		Net profit/loss after tax		Profit margin	
	2019 ¹	2022 ²	2019 ¹	2022 ²	2019 ¹	2022 ²
	R million				%	
Post and associated courier activities	16 093	21 810	-912	-2 163	-5,7	-9,9
Telecommunications	340 854	348 138	12 248	35 888	3,6	10,3
Total	356 947	369 948	11 336	33 725	3,2	9,1

¹ Revised figures.² Preliminary figures.

Table 4 – Income in the post and telecommunications industry, 2019 and 2022

Type of income	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Sales of goods	41 478	11,2	42 511	10,8	0,8
Services	314 864	85,1	327 056	83,4	1,3
Interest	3 676	1,0	3 384	0,9	-2,7
Other income	10 033	2,7	19 239	4,9	24,2
Total	370 051	100,0	392 190	100,0	2,0

¹ Revised figures.² Preliminary figures.**Table 5 – Income by type of service in the post and telecommunications industry, 2022²**

Type of service	Sales of goods	Services	Interest	Other income	Total income
	R million				
Post and associated courier activities	4	21 776	1 138	1 079	23 997
Telecommunications	42 507	305 280	2 246	18 160	368 193
Total	42 511	327 056	3 384	19 239	392 190

² Preliminary figures.

Table 6 – Income by size group in the post and telecommunications industry, 2022²

Type of service	Large enterprises	Medium enterprises	Small enterprises	Micro enterprises	Total
	R million				
Post and associated courier activities	19 527	1 204	2 220	1 046	23 997
Telecommunications	349 278	8 187	6 744	3 984	368 193
Total	368 805	9 391	8 964	5 030	392 190

² Preliminary figures.

Table 7 – Concentration ratios (relative contribution of large enterprises) in the post and telecommunications industry, 2022²

Type of service	Total income	Income of 5 largest enterprises ³	Relative contribution of 5 largest enterprises ⁴	Income of 10 largest enterprises ³	Relative contribution of 10 largest enterprises ⁴	Income of 20 largest enterprises ³	Relative contribution of 20 largest enterprises ⁴
	R million		% contribution	R million	% contribution	R million	% contribution
Post and associated courier activities	23 997	13 388	55,8	17 766	74,0	19 819	82,6
Telecommunications	368 193	218 225	59,3	276 361	75,1	318 482	86,5
Total	392 190	218 225	55,6	276 361	70,5	322 405	82,2

² Preliminary figures.

³ The figures in the 'Total' row reflect the income of the 5, 10 and 20 largest enterprises respectively, and not the column totals.

⁴ Relative contribution = income of the largest enterprises divided by total income multiplied by 100.

Table 8 – Expenditure in the post and telecommunications industry, 2019 and 2022

Type of expenditure	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Purchases	148 251	43,0	141 215	40,7	-1,6
Subcontractors' payments	18 222	5,3	18 970	5,4	1,4
Salaries and wages	33 632	9,8	34 443	9,9	0,8
Leasing and hiring of plant, machinery, equipment and vehicles	2 302	0,7	2 207	0,6	-1,4
Rental and leasing of land, buildings and other structures	6 969	2,0	3 280	0,9	-22,2
Interest	10 969	3,2	14 390	4,1	9,5
Advertising, marketing, promotions	5 155	1,5	6 709	1,9	9,2
Cross-border costs	3 877	1,1	1 711	0,5	-23,9
Telecommunications	6 375	1,9	8 663	2,5	10,8
Depreciation	26 673	7,7	38 888	11,2	13,4
Other expenditure	82 130	23,8	77 796	22,3	-1,8
Total	344 555	100,0	348 273	100,0	0,4

¹ Revised figures.² Preliminary figures.

Table 9 – Expenditure in the post and telecommunications industry, 2022²

Type of service	Purchases	Subcontractors' payment	Salaries and wages	Leasing and hiring of plants, machinery, equipment and vehicles	Rental and leasing of land, buildings and other structures	Motor vehicle expenditure
	R million					
Post and associated courier activities	3 751	4 846	8 656	309	799	242
Telecommunications	137 464	14 124	25 787	1 898	2 481	204
Total	141 215	18 970	34 443	2 207	3 280	446

² Preliminary figures.**Table 9 – Expenditure in the post and telecommunications industry, 2022² (continued)**

Type of service	Interest	Insurance	Advertising, marketing, promotions	Depreciation	Repairs and maintenance	Telecommunications
	R million					
Post and associated courier activities	1 107	218	293	1 062	85	332
Telecommunications	13 283	973	6 416	37 826	8 433	8 331
Total	14 390	1 191	6 709	38 888	8 518	8 663

² Preliminary figures.**Table 9 – Expenditure in the post and telecommunications industry, 2022² (concluded)**

Type of service	Cross-border costs	Losses on financial and other liabilities	Losses on financial and other assets	Professional fees	Security services	Other expenditure	Total
	R million						
Post and associated courier activities	80	40	105	232	854	2 924	25 935
Telecommunications	1 631	235	2 634	3 424	844	56 350	322 338
Total	1 711	275	2 739	3 656	1 698	59 274	348 273

² Preliminary figure.

Table 10 – Capital expenditure on new assets in the post and telecommunications industry, 2019 and 2022

Type of asset	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Land and buildings	546	1,5	6 382	15,3	126,9
Plant, machinery, furniture and other office equipment	1 125	3,1	10 441	25,1	110,2
Computers and other ICT equipment	25 436	71,1	19 676	47,3	-8,2
Motor vehicles and other transport equipment	378	1,1	495	1,2	9,4
Other assets	8 297	23,2	4 605	11,1	-17,8
Total	35 782	100,0	41 599	100,0	5,1

¹ Revised figures.² Preliminary figures.**Table 11 – Capital expenditure on new assets in the post and telecommunications industry, 2022²**

Type of service	Land and buildings	Plant, machinery, furniture and other office equipment	Computers and other ICT equipment	Motor vehicles and other transport equipment	Capital work in progress	Other expenditure	Total
	R million						
Post and associated courier activities	171	134	88	382	16	17	808
Telecommunications	6 211	10 307	19 588	113	543	4 029	40 791
Total	6 382	10 441	19 676	495	559	4 046	41 599

² Preliminary figures.

Table 12 – Employment in the post and telecommunications industry as at the end of June, 2019 and 2022

Type of service	Female employees			Male employees			Total employees		
	2019 ¹	2022 ²	Annualised % change	2019 ¹	2022 ²	Annualised % change	2019 ¹	2022 ²	Annualised % change
	Number			Number			Number		
Post and associated courier activities	13 726	14 621	2,1	20 575	25 066	6,8	34 301	39 687	5,0
Telecommunications	24 876	20 194	-6,7	35 944	28 611	-7,3	60 820	48 805	-7,1
Total	38 602	34 815	-3,4	56 519	53 677	-1,7	95 121	88 492	-2,4

¹ Revised figures.² Preliminary figures.**Table 13 – Employment by status in the post and telecommunications industry as at the end of June 2022²**

Type of service	Full-time			Part-time			Total
	Female	Male	Total	Female	Male	Total	
	Number						
Post and associated courier activities	14 427	24 850	39 277	194	216	410	39 687
Telecommunications	18 880	27 446	46 326	1 314	1 165	2 479	48 805
Total	33 307	52 296	85 603	1 508	1 381	2 889	88 492

² Preliminary figures.**Table 14 – Employment by enterprise size in the post and telecommunications industry as at the end of June 2022²**

Type of service	Large enterprises	Medium enterprises	Small enterprises	Micro enterprises	Total
	Number				
Post and associated courier activities	33 702	1 365	2 721	1 899	39 687
Telecommunications	33 349	6 619	5 013	3 824	48 805
Total	67 051	7 984	7 734	5 723	88 492

² Preliminary figures.

Table 15 – Details of income from services in post and associated courier activities, 2019 and 2022

Type of service	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
International mail services	389	2,5	165	0,8	-24,9
Domestic bulk mail services	1 788	11,5	1 097	5,0	-15,0
Box rental, private bags and box services	300	1,9	169	0,8	-17,4
Other postal services	930	6,0	713	3,3	-8,5
Same-day delivery services	507	3,3	1 872	8,6	54,6
Next-day/overnight delivery services	3 968	25,6	5 160	23,7	9,2
Economy delivery services, two days or more	3 996	25,8	6 787	31,2	19,3
Other courier and express services	2 045	13,2	4 476	20,6	29,8
Income from financial and agency services	1 555	10,0	1 234	5,7	-7,4
Other services rendered	10	0,1	103	0,5	117,6
Total	15 488	100,0	21 776	100,0	12,0

¹ Revised figures.² Preliminary figures.**Table 16 – Details of purchases in post and associated courier activities, 2019 and 2022**

Type of purchase	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Fuel and gas	1 437	43,9	2 359	62,9	18,0
Fleet related maintenance e.g. oils, lubricants, spare parts, tyres and tubes	333	10,2	600	16,0	21,7
Total packaging materials	971	29,6	510	13,6	-19,3
Paper and board (e.g. paper bags, cardboard boxes, paper tubes)	643	19,6	277	7,4	-24,5
Plastic (e.g. plastic crates, shrink wrap, bags)	271	8,3	212	5,7	-7,9
Other containers and packaging materials	57	1,7	21	0,6	-28,3
Total other purchases and transfers-in	535	16,3	282	7,5	-19,2
Stationery (e.g. stamps, envelopes, postcards)	163	5,0	106	2,8	-13,4
Consumables (e.g. hand tools, protective clothing, cleaning materials, uniforms, stationery)	266	8,1	149	4,0	-17,6
Other purchases and transfers-in	106	3,2	27	0,7	-36,6
Total	3 276	100,0	3 751	100,0	4,6

¹ Revised figures.² Preliminary figures.

Table 17 – Details of income from services in telecommunication activities, 2019 and 2022

Type of service	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
A. Telecommunications services					
Total income from telecommunications services through fixed lines (including fixed-mobile)	14 466	4,8	11 106	3,6	-8,4
Prepaid					
Voice calls	2 852	1,0	1 807	0,6	-14,1
Data	94	0,0	103	0,0	3,1
Other services	356	0,1	340	0,1	-1,5
Post paid					
Voice calls	9 931	3,3	3 903	1,3	-26,8
Data	1 137	0,4	4 926	1,6	63,0
Other services	95	0,0	27	0,0	-34,3
Total income from telecommunications services through mobile lines	160 679	53,7	163 110	53,4	0,5
Prepaid					
Voice calls	87 533	29,2	80 344	26,3	-2,8
Data	35 238	11,8	40 480	13,3	4,7
SMS	1 124	0,4	652	0,2	-16,6
Post paid					
Voice calls	12 307	4,1	12 404	4,1	0,3
Data	22 227	7,4	28 401	9,3	8,5
SMS	2 253	0,8	828	0,3	-28,4

¹ Revised figures.² Preliminary figures.

Table 17 – Details of income from services in telecommunication activities, 2019 and 2022 (continued)

Type of service	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Total income for data transmission services	5 347	1,8	5 401	1,8	0,3
Fixed (wired)	2 836	0,9	2 984	1,0	1,7
Wireless	2 511	0,8	2 417	0,8	-1,3
Total income from internet telecommunications access services	17 335	5,8	18 826	6,2	2,8
ADSL or copper, cable	11 024	3,7	3 079	1,0	-34,6
Fibre optic (FTTB, FTTH)	3 462	1,2	10 991	3,6	47,0
Other (e.g. 4G)	2 849	1,0	4 756	1,6	18,6
Interconnection services					
Interconnection and backbone services (support and set-up services) linking networks together	16 570	5,5	13 988	4,6	-5,5
Total telecommunications and/or connectivity services, including managed services	32 470	10,8	38 101	12,5	5,5
Line rental (contracts)	5 466	1,8	4 583	1,5	-5,7
Internet of things (IoT) (machine-related services) with access to services (financial, digital, personal), including software	1 348	0,5	2 133	0,7	16,5
Content subscription services, including Wireless Application Services (WASP), excluding data	4 386	1,5	5 140	1,7	5,4
Satellite-provide services	2 131	0,7	2 052	0,7	-1,3
Other telecommunications and/or connectivity services, including managed services	19 139	6,4	24 193	7,9	8,1
Other telecommunication services					
Data centres services	478	0,2	1 670	0,5	51,7
Financial services e.g., insurance	3 757	1,3	1 967	0,6	-19,4
Total income from telecommunications services	251 102	83,9	254 169	83,3	0,4

¹ Revised figures.² Preliminary figures.

Table 17 – Details of income from services in telecommunication activities, 2019 and 2022 (concluded)

Type of service	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
B. Broadcasting services					
Subscription fees	26 803	9,0	26 776	8,8	0,0
Licence fees	1 542	0,5	1 003	0,3	-13,4
Content income	4 915	1,6	5 394	1,8	3,1
Total advertising airtime income except on commission	9 531	3,2	9 052	3,0	-1,7
Television	6 666	2,2	6 685	2,2	0,1
Radio	2 782	0,9	2 329	0,8	-5,8
Other	83	0,0	39	0,0	-22,3
Total sponsorship income	1 427	0,5	1 249	0,4	-4,3
Television	833	0,3	827	0,3	-0,2
Radio	594	0,2	422	0,1	-10,8
Other radio and television broadcasting services	798	0,3	807	0,3	0,4
Total income from broadcasting services	45 016	15,0	44 282	14,5	-0,5
Other services rendered	3 258	1,1	6 829	2,2	28,0
Total	299 376	100,0	305 280	100,0	0,7

¹ Revised figures.² Preliminary figures.

Table 18 – Details of sales of goods in telecommunications, 2019 and 2022

Type of goods	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Total income from sales of instruments (handsets) and equipment					
Fixed-line phones	247	0,6	253	0,6	0,8
Cell phones	29 943	72,2	30 089	70,8	0,2
Other telecommunication equipment	8 718	21,0	9 213	21,7	1,9
Total income from sales of broadcasting goods					
Decoders	2 383	5,7	2 776	6,5	5,2
Other broadcasting equipment	104	0,3	1	0,0	-78,7
Other sales goods	83	0,2	179	0,4	29,2
Total	41 478	100,0	42 511	100,0	0,8

¹ Revised figures.² Preliminary figures.

Table 19 – Details of purchases in telecommunications, 2019 and 2022

Type of purchase	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Fuel and gas	2 850	2,0	3 085	2,2	2,7
Total instruments (handsets) and equipment	116 424	80,3	100 124	72,9	-4,9
Cell phones	32 003	22,1	30 810	22,4	-1,3
Vouchers – airtime/data	67 610	46,6	57 057	41,5	-5,5
Starter packs (including sim cards)	3 464	2,4	2 133	1,6	-14,9
Decoders and set-top boxes	3 615	2,5	3 552	2,6	-0,6
Other telecommunications equipment	9 732	6,7	6 572	4,8	-12,3
Total other purchases and transfers-in	25 701	17,7	34 255	24,9	10,1
Content for broadcasting	7 074	4,9	7 388	5,4	1,5
Content for telecommunications	6 386	4,4	9 157	6,7	12,8
Capacity for telecommunications	5 405	3,7	6 388	4,6	5,7
Other purchases and transfers-in	6 836	4,7	11 322	8,2	18,3
Total purchase	144 975	100,0	137 464	100,0	-1,8

¹ Revised figures.² Preliminary figures.

Table 20 – Income from sales of goods and services by client base in the post and telecommunications industry, 2019 and 2022

Type of client	2019 ¹		2022 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Individuals and households	127 299	35,7	180 674	48,9	12,4
Businesses (including NGOs)	208 726	58,6	162 517	44,0	-8,0
Government and parastatals	20 317	5,7	26 376	7,1	9,1
Total income	356 342	100,0	369 567	100,0	1,2

¹ Revised figures.² Preliminary figures.**Table 21 – Income from sales of goods and services by client base in the post and telecommunications industry, 2022²**

Type of service	Individuals and households		Businesses (including NGOs)		Government and parastatals		Total income	
	R million	% contribution	R million	% contribution	R million	% contribution	R million	% contribution
Post and associated courier activities	16 571	9,2	3 672	2,3	1 537	5,8	21 780	5,9
Telecommunications	164 103	90,8	158 845	97,7	24 839	94,2	347 787	94,1
Total	180 674	100,0	162 517	100,0	26 376	100,0	369 567	100,0

² Preliminary figures.

Table 22 – Information and communication technology usage by type of service in the post and telecommunications industry, 2022²

Type of service	Use computer	Use internet	Have a website	Use internet for advertising	Use internet to sell goods	Use internet to update clients	Use internet for financial transactions	IT outsourced	Invest in ICT training
	%								
Post and associated courier activities	98,6	98,6	82,4	59,5	32,4	28,4	24,3	41,9	24,3
Telecommunications	99,6	99,6	90,1	71,2	34,8	35,2	15,5	21,9	37,3
Total	99,3	99,3	88,3	68,4	34,2	33,6	17,6	26,7	34,2

² Preliminary figures.**Table 23 – Information and communication technology usage by size group in the post and telecommunications industry, 2022²**

Size group	Use computer	Use internet	Have a website	Use internet for advertising	Use internet to sell goods	Use internet to update clients	Use internet for financial transactions	IT outsourced	Invest in ICT training
	%								
Large enterprises	97,6	97,6	95,3	82,4	55,3	47,1	35,3	21,2	42,4
Medium enterprises	100,0	100,0	95,7	69,6	32,6	39,1	15,2	21,7	37,0
Small enterprises	100,0	100,0	83,9	59,8	23,0	31,0	11,5	33,3	32,2
Micro enterprises	100,0	100,0	82,0	62,9	25,8	20,2	7,9	28,1	27,0
Total	99,3	99,3	88,3	68,4	34,2	33,6	17,6	26,7	34,2

² Preliminary figures.

Explanatory notes

Background

The results presented in this publication have been derived from the 2022 large sample survey of the post and telecommunications industry. This is a periodic survey which measures economic activity in the post and telecommunications industry of the South African economy. This survey is based on a sample of private and public enterprises operating in the post and telecommunications industry.

The sample was drawn from Stats SA's statistical business register (SBR), based on the units registered for value-added tax (VAT).

Value-added tax (VAT)

All figures exclude VAT.

Reference period

The information was collected from enterprises for their financial year, which ended on any date between 01 July 2021 and 30 June 2022.

Purpose of the survey

Results of the survey are used within Stats SA for benchmarking the gross domestic product (GDP) and its components. These statistics are also used by government policy advisors in monitoring the performance and contribution of individual industries to the South African economy and the effectiveness of industry policies, and by private sector users in analyses of comparative business and industry performance.

Classification by industry

The 1993 edition of the *Standard Industrial Classification of All Economic Activities (SIC)*, Fifth Edition, Report No. 09-90-02, was used to classify the statistical units in the survey. The SIC is based on the 1990 *International Standard Industrial Classification of All Economic Activities (ISIC)* with suitable adaptations for local conditions. Statistics in this publication are presented at a five-digit SIC group level. Each enterprise is classified to an industry, which reflects its predominant activity.

Statistical unit

The statistical unit for the collection of the information is an enterprise. An enterprise is a legal unit (or a combination of legal units) that includes and directly controls all functions necessary to carry out its activities.

Size groups

The enterprises are divided into four size groups according to the value of turnover recorded for them on the SBR. Large enterprises are those with an annual recorded turnover above R156 million. Table 24 presents Department of Trade, Industry and Competition (DTIC) cut-off points adjusted by a factor of 6,0.

Table 24 – Size groups for the post and telecommunications industry, 2022

Size group	Annual turnover
Large enterprises	Turnover > R156 000 000
Medium enterprises	R36 000 000 < turnover ≤ R156 000 000
Small enterprises	R6 000 000 < turnover ≤ R36 000 000
Micro enterprises	Turnover ≤ R6 000 000

Survey methodology and design

The survey was conducted by email, fax, telephone and personal visits. A sample of approximately 800 enterprises contributing the top 99,5% of industry turnover was conducted. The enterprises were first stratified at the four-digit level according to the SIC and then by size of enterprise. Turnover as recorded on the SBR was used as the measure of size for stratification.

Collection rate

Collection rate = $((\text{collected} + \text{finalised investigations}) / \text{sample size}) \times 100$. The collection rate was 77,6%.

Turnover collection rate

Turnover collection rate = $((\text{weighted collected enterprises SBR turnover} + \text{weighted finalised investigations SBR turnover}) / \text{population turnover}) \times 100$. The turnover collection rate was 97,6%.

Abbreviations

DTIC	Department of Trade, Industry and Competition
GDP	Gross domestic product
ISIC	International Standard Industrial Classification of All Economic Activities
PPI	Producer Price Index
SBR	Statistical Business Register
SIC	Standard Industrial Classification of All Economic Activities
Stats SA	Statistics South Africa
VAT	Value-added tax
0	Rand value less than R500 000

Glossary

Concentration ratio	The ratio of the income of the <i>n</i> largest enterprises to the total income.
Employees	Persons employed by a business or organisation and who received payment (in salaries, wages, commission, piece rates or payments in kind) for the last pay period ended on or before 30 June of a year.
Enterprise	A legal entity or a combination of legal units that includes and directly controls all functions necessary to carry out its activities.
Full-time employees	Full-time employees are those (permanent, temporary or casual) who normally work 40 hours or more per week.
Motor vehicles	Motor vehicles include cars, trucks, aircraft, boats, trailers, locomotives and other transport equipment.
Net profit or loss after tax	Net profit or loss after tax is derived as: Total income plus closing value of inventories minus total expenditure minus opening value of inventories minus company tax.
Net profit or loss before tax	Net profit or loss before tax is derived as: Total income plus closing value of inventories minus total expenditure minus opening value of inventories.

Other expenditure	<p>Includes:</p> <p>Accommodation; amortisation, <i>excluding depreciation</i>; bank charges; bursaries for own employees (staff bursaries); computer expenditure (when not part of non-current assets); donations, sponsorships and social investment for <i>non-employees</i>; entertainment; excise and customs duty; losses on foreign exchange as a result of variations in foreign exchange rates; losses on financial and other liabilities: redemption, liquidation or revaluation; mineral rights leases; paper, printing and stationery;; property taxes paid; provisions; research and development; royalties, franchise fees, copyright, trade names, trademarks and patent rights paid; security services; severance, termination and redundancy payments; skills development levy; staff training; subscriptions; travelling; water and electricity; payments to labour brokers and other expenditure.</p>
Other income	<p>Includes:</p> <p>Capital transfers received (only from the South African government); dividends received; mineral rights leases; net profit on foreign loans as a result of variations in foreign exchange rates; royalties, franchise fees, copyright, trade names and patent rights received; profit on financial and other liabilities: redemption, liquidation and revaluation of liabilities; provisions; government subsidies and incentives received (only from the South African government); and other income.</p>
Part-time employees	<p>Part-time employees are those (permanent, temporary or casual) who usually work less than 40 hours per week.</p>
Profit margin	<p>Profit margin is derived as:</p> <p>Net profit or loss after tax <i>divided by</i> turnover <i>multiplied by</i> 100.</p>
Statistical unit	<p>A statistical unit is a unit of observation or measurement for which statistical data are collected or derived.</p>
Stratum	<p>A stratum is constructed by concatenating the SIC classification and size group variables.</p>
Turnover	<p>Turnover includes:</p> <ul style="list-style-type: none">• value of sales of goods;• amount received for services rendered;• rent and lease payments received for land and buildings; and• rent, leasing and hiring received for machinery, vehicles and other equipment.