National Gambling Board
South Africa
a member of the dtic group

GAMBLING SECTOR PERFORMANCE IN SOUTH AFRICA

2024-2025

SUMMARY REPORT

CONTENTS

1. FOREWORD BY THE CHIEF EXECUTIVE OFFICER

The National Gambling Board (NGB) is pleased to present the latest statistics for the gambling sector for the financial year 2024/25 (1 April 2024 to 31 March 2025). As mandated by Section 65 of the National Gambling Act (Act No. 7 of 2004), the NGB monitors gambling trends, market share, and conduct. This report highlights key insights into the industry's economic performance, while a separate socio-economic impact study, derived from a national survey, provides a social perspective.

Gambling is a rapidly growing industry in the country, with total amounts wagered reaching R1.5 trillion by the end of FY2024/25. Gross gambling revenue (GGR), the portion retained by gambling operators after payouts, amounted to R74.5 billion. In the four years preceding the pandemic year (FY2020/21), the industry recorded average growth of 5.9%. In contrast, the four years following the COVID-19 period saw growth surge to 34.1% on average.

This sharp increase indicates that the industry experienced a significant structural shift following the disruptions caused by COVID-19, with consumer spending on gambling rising sharply. Gambling has evolved from a niche activity into one that is ubiquitous.

A key trend emerging from the latest statistics is that the betting sector was the only segment to record positive growth. Land-based modes, including casinos, bingo, and limited payout machines (LPMs), all experienced declines. Consequently, the overall growth rate of 25.6% in the past year was driven entirely by betting, which predominantly occurs online.

This presents both opportunities and challenges for the industry. On the one hand, the rapid expansion of the betting sector creates opportunities for new market entrants, contributing to job creation. It also generates increased government revenue for public benefit, which reached R5.8 billion in FY2024/25. On the other hand, the social consequences, particularly the rise in problem gambling, are becoming more pronounced. This emphasises the need for greater resource allocation toward the treatment of affected individuals and their families.

The NGB continues to play a critical role in raising public awareness about the risks associated with gambling and will intensify these efforts in response to the current environment. Our enforcement initiatives aim to eliminate illegal gambling activities, ensuring that consumers engage only with compliant operators and certified gambling equipment.

The NGB collects data from provincial licensing authorities (PLAs), enabling us to assess trends in the South African gambling landscape and inform stakeholders about the size and growth of the industry each year. We extend our appreciation to all PLAs for their contribution of the information and statistics that make this publication possible.

Mr Lungile Dukwana
Acting Chief Executive Officer

"The Responsible Gambler uses gambling for fun and entertainment."

2. ACKNOWLEDGEMENTS

All provincial licensing authorities (PLAs) are acknowledged for submitting audited information on market conduct market share and provincial gambling statistics per gambling mode, operator and province.

DISCLAIMER

The National Gambling Board (NGB) and the Department of Trade, Industry and Competition (**the dtic**) do not guarantee or provide any commercial warranties regarding the robustness of the information and data published herein for the purpose of use, nor are any such warranties to be implied with respect to the information and data published herein.

In no event shall the NGB and **the dtic**, nor their employees, officers or representatives, be liable to users of the data and information provided, or to any other party, for any loss or damage, whether consequential or otherwise, including but not limited to time, money or goodwill, arising from the use, operation or modification of the data or information, or for the failure to transmit a copy of any particular document. In using the information or data, users assume the risk of relying on such data or information and further agree to indemnify, defend and hold harmless the NGB or **the dtic** and their employees, officers and representatives for any and all liability of any nature arising out of or resulting from the lack of accuracy or correctness of the information or data, or the use of the information or data. Further, in using this information or data, the user acknowledges that they are responsible for personally assessing the accuracy and reliability of the data or information provided and that the images provided, or copies thereof, are subject to error and omission and are not guaranteed or warranted to be true, complete or correct.

The data published herein is not for commercial purposes. No person, entity or user shall sell, give or receive, for the purpose of selling or offering for sale, any portion of the information or data provided herein, nor may they use the information in a manner that violates any law or regulation.

CONTRIBUTORS

The following PLAs contributed to the compilation of this report by submitting audited provincial gambling statistics and information on market conduct:

- Eastern Cape Gambling Board
- Free State Gambling and Liquor Authority
- Gauteng Gambling Board
- KwaZulu-Natal Economic Regulatory Authority
- Limpopo Gambling Board
- Mpumalanga Economic Regulator
- Northern Cape Gambling Board
- North West Gambling Board
- Western Cape Gambling and Racing Board

3. ACRONYMS

B-BBEE	Broad-Based Black Economic Empowerment
EBT	Electronic Bingo Terminal
EC	Eastern Cape
FS	Free State
FY	Financial Year
GDP	Gross Domestic Product
GGR	Gross Gambling Revenue
GP	Gauteng
KZN	KwaZulu-Natal
L	Limpopo
LPMs	Limited Payout Machines
MP	Mpumalanga
N/A	Not Applicable
NC	Northern Cape
NCEMS	National Central Electronic Monitoring System
NGA	National Gambling Act, 2004 (Act 7 of 2004)
NGB	National Gambling Board
NW	North West
PLAs	Provincial Licensing Authorities
Qrt	Quarter
RTP	Return to Punter
the dtic	The Department of Trade, Industry and Competition
TO	Turnover
WC	Western Cape
YoY	Year-on-Year

4. EXPLANATORY NOTES

Term	*Definition*
Key employees (licensed)	Senior management of the licensee. If the licensee is a corporate body, every director or officer or equivalent of that corporate body and any individual who has the authority to hire or terminate supervisory casino personnel; any individual who has the authority to supervise or direct a shift of gaming or security activity; individuals who have the authority or responsibility to manage one or more departments or functions of the operations (accounting, credit and collections, cage, personnel, internal audit, security and surveillance); any individual who specifically represents to the board as being important or necessary to the operation of the entity; all persons who individually or as part of a group formulate management policy; any job position or individual who upon notification by the gambling board is to be considered a key employee; anyone whom the board considers to have functions and responsibilities that place that employee in key employee status.
Other gaming employees (licensed)	Table inspector, dealer/croupier, cashier, counter, change attendant, host, floor attendant, security attendant, gaming machine attendant, gaming machine technician, surveillance personnel (lower-ranking), gaming debt collection personnel, internal audit, accounting personnel, data processing, and any other occupation that, upon notification by the board, is considered to be a gambling occupation for the purposes of the regulations.
Permanent employees (key and other)	Key (licensed) and other gaming (licensed) employees.
Temporary employees	Where the application for registration has been made to the board and the operation of the licensees' business will be prejudiced or disadvantaged by the delay. Such temporary licenses may be issued pending the outcome of the applicant's application for registration (in other words, a temporary licence issued in anticipation of a permanent employee licence being issued).
Gambling machine/slot machine (used interchangeably)	A slot machine, informally known as a fruit machine, is a casino gambling machine with three or more reels, which spin when a button is pushed or a handle is pulled (older mechanical types). These slot machines are also known as 'one-armed bandits' because of the single lever on the side of the machine (the arm) and because of their ability to leave the gamer penniless (bandit). The machine pays off based on patterns of symbols visible on the front of the machine when it stops. Slot machines are the most popular gambling method in casinos and constitute about 80% of the average casino's income.
Gross gambling revenue (GGR)	Gross gambling revenue is defined as the rand value of the gross revenue of an operator in terms of turnover, less winnings paid to players.
Horse racing	Horse racing is the sport in which horses and their riders take part in races, typically with substantial betting on the outcome.
Licensed (all modes and outlets)	Licensed refers to a person or company is in possession of a valid licence, registration card or certificate allowing them to offer approved gambling activities within licensed premises to persons over the age of 18.
Limited payout machines (LPMs)	Limited payout machine means a gambling machine outside of a casino, the playing of which offers limited stakes and prizes.
Return to player (RTP)	Return to player is an average amount of money returned to players achieved over a significant number of game plays and not each time the gambling machine is played (total amount returned to players divided by the total amount amount wagered by players).
Route operator (RO)	A route operator is a juristic person licensed to own and operate limited payout machines, maintain and effect the collection of money, and pay taxes and levies in respect of all machines under its licence.

Term	*Definition*
Site operator (SO)	A site operator is a natural or juristic person licensed to manage limited payout machines owned by a route operator on their licensed premises (also known as a site) and to make them available to be played by members of the public.
Table game	In casinos, the term ‘table game’ is used to distinguish games such as blackjack, craps, roulette and baccarat that are played on a table and operated by one or more live dealers, such as a croupier or poker dealer.
Taxes/levies	Gambling tax levied by and collected by provincial licensing authorities.
Totalisator/pari-mutuel betting (used interchangeably)	Totalisator is the name for the automated pool betting system, which runs pari-mutuel betting, calculating payoff odds, displaying them, and producing tickets based on incoming bets. Pari-mutuel betting is a betting system in which all bets of a particular type are placed together in a pool; taxes and the ‘house stake’ are removed, and payoff odds are calculated by sharing the net pool among all winning bets.
Turnover (TO)	Turnover is the rand value of money wagered. This includes ‘recycling’, which refers to amounts staked on more than one occasion. ‘TO’ in the fixed odds/bookmaking environment is, however, different from other forms of gambling in that the amount of money crossing the table is not seen as turnover. This is because the amount of money staked/wagered/bet on an event is returned to the player should the player win the wager/bet, so a true description of turnover in fixed odds/bookmaking parlance is money wagered minus the stakes wagered on winning bets, which equals fixed odds/bookmaking turnover.

5. EXECUTIVE SUMMARY

At the end of FY 2024/25, R1.5 trillion in turnover was wagered in the South African gambling industry, a 30.7% increase on the previous year. Gross gambling revenue (GGR) totalled R74.5 billion, a 25.6% increase on the previous year.

Analysis of GGR by gambling mode revealed that betting accounted for more than two-thirds of industry GGR at 70% (R52.0 billion). Casinos also accounted for a sizeable share of GGR at R16.7 billion (22%). The limited payout machines (LPMs) industry is the third-largest sector (6%), generating R4.1 billion in FY 2024/25. The bingo sector accounted for 2% of revenue at R1.7 billion.

GGR growth across gambling modes showed betting was the sole driver, increasing 44.7% relative to the previous financial year. Over the same period, the casino, LPMs and bingo sectors declined by 4.1%, 0.04% and 8.6%, respectively. This reflects a decline in land-based modes, as the majority of betting takes place online.

At the national level, the betting sector is the largest gambling mode; however, provincial analysis shows that in Gauteng, KwaZulu-Natal (KZN), the Eastern Cape, North West, and Free State, casinos are the largest sectors. In Gauteng, for example, casinos accounted for 56.1% of GGR in FY 2024/25. The betting sector dominated the Western Cape (84.4%), Mpumalanga (95.9%), Limpopo (83.5%) and Northern Cape (59.8%) markets.

The betting industry consists of bookmakers and totalisators, offering betting on sports and other contingencies, as well as horse racing. The dominant sub-sector is the bookmakers' sports betting, which makes up R47.9 billion of betting revenue. The data also shows that 86% of betting takes place online.

In the casino sector, Gauteng contributed the most to GGR at 45%, followed by Mpumalanga with 41%. The Western Cape led the betting sector with 37% of GGR. In the LPMs sector, the Western Cape (22%) and KZN (21%) are the top provinces. For bingo, Gauteng (30%) and the Eastern Cape (24%) generated the highest revenues.

Taxes/levies totalled R5.8 billion in FY 2024/25, 20.1% higher than the previous year. Betting generated the largest proportion of taxes/levies at 59%, followed by casinos (30%), LPMs (9%) and bingo (2%).

SNAPSHOT OF THE GAMBLING INDUSTRY FY 2023/24 AND FY 2024/25

Table 1: Snapshot of the Gambling Industry as at 31 March 2025

Variable	FY 2023/24 Market Conduct – as at Quarter 4 Statistics – Total all Quarters	FY 2024/25 Market Conduct – as at Quarter 4 Statistics – Total all Quarters	FY 2024/25 Quarter 1	FY 2024/25 Quarter 2	FY 2024/25 Quarter 3	FY 2024/25 Quarter 4
Number of operational casinos	37	36	37	37	37	36
Number of operational slots (casinos)	22,070	21,370	22,047	21,824	21,370	21,591
Number of operational tables (casinos)	955	890	954	926	936	890
Number of operational gambling positions (casinos)	35,748	28,362	34,993	35,285	34,680	28,362
Number of operational totalisator outlets	366	325	366	357	368	325
Number of operational bookmakers	349	315	750	349	355	315
Number of operational bookmaker outlets	594	553	601	591	589	553
Number of operational LPM site operators	2,599	2,546	2,555	2,530	25,66	2,546
Number of active LPMs	15,805	15,743	15,656	15,604	15,798	15,743
Number of operational bingo outlets	70	73	66	65	66	73
Number of operational bingo positions	12,290	13,452	12,290	11,755	12,270	13,452
Traditional	0	0	0	0	0	0
Electronic bingo terminals	12,290	13,452	12,290	11,755	12,270	13,452
National gambling statistics: Turnover	R1,142,683,922,400	R1,500,660,968,064	R330,517,575,459	R694,221,309,756	R1,100,365,133,361	R1,500,660,968,064
National gambling statistics: GGR	R59,306,767,610	R74,498,495,925	R17,273,080,690	R35,385,848,982	R55,448,071,997	R74,498,495,925
National gambling statistics: Taxes/levies collected	R4,840,977,357	R5,812,135,921	R1,344,122,195	R2,763,953,289	R4,335,779,634	R5,812,135,921

Table 2: Maximum licenses per gambling mode per province as at 31 March 2025

Maximum Number of Licences	Eastern Cape	Free State	Gauteng	KZN	Limpopo	Mpumalanga	North West	Northern Cape	Western Cape
Maximum number of casino licences	5	4	7	5	3	4	4 active 1 pending	3	5
Maximum number of route operator licences	2	Unlimited	5	Unlimited	No set maximum number	Unlimited	Unlimited	2	2
Maximum number of bookmaker licences	Unlimited	Unlimited, subject to sufficient market demand and operational viability	131	48	No set maximum number	Unlimited, subject to sufficient market demand and operational viability	Unlimited, subject to sufficient market demand and operational viability	19	Unlimited
Maximum number of totalisator licences	Unlimited	Unlimited, subject to sufficient market demand and operational viability	1	2	No set maximum number	Unlimited, subject to sufficient market demand and operational viability	Unlimited, subject to sufficient market demand and operational viability	2	Unlimited
Maximum number of bingo licences	15	No roll out currently	11	Unlimited, subject to sufficient market demand and operational viability	No set maximum number	Unlimited, subject to sufficient market demand and operational viability	Unlimited, subject to sufficient market demand and operational viability	No roll out currently	No roll out currently

CHAPTER 1

NATIONAL GAMBLING STATISTICS

1. INTRODUCTION

The purpose of this section is to provide an overview of national gambling statistics (per gambling mode and province) based on provincial gambling statistics submitted by all PLAs during the reporting periods as indicated.

2. TURNOVER PER GAMBLING MODE AND PROVINCE

2.1 A total of R1.5 trillion was wagered in FY 2024/25. This represents a 30.7% increase from the previous year's turnover of R1.1 trillion. The betting sector generated the bulk of industry turnover at 75%. Mpumalanga and the Western Cape were the dominant provinces, accounting for 41% and 27%, respectively. The turnover per gambling mode and province is reflected in Figures 1 and 2.

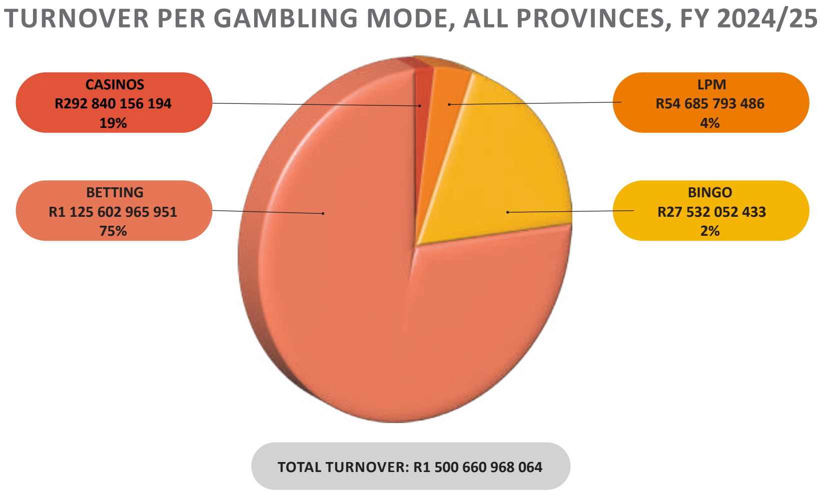


Figure 1: Turnover per gambling mode, all provinces, FY 2024/25

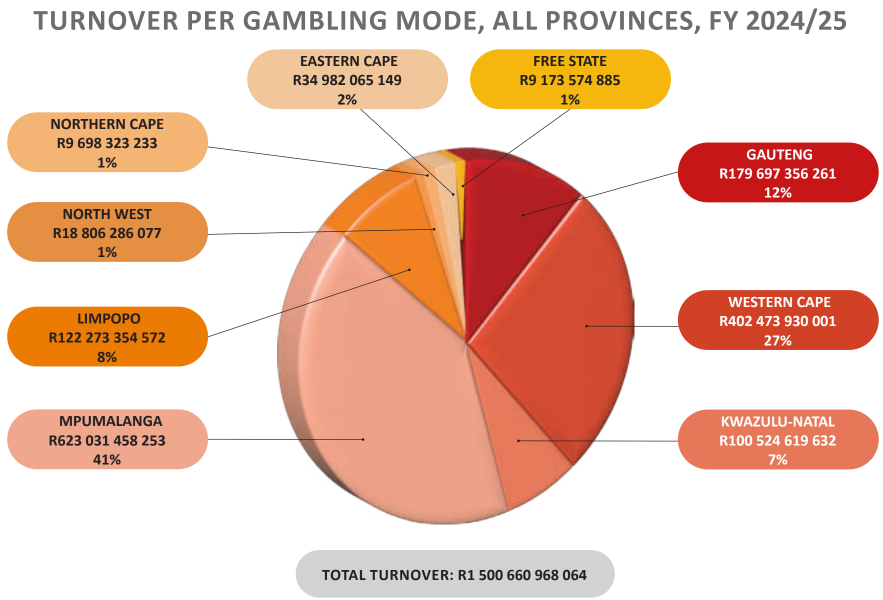


Figure 2: Turnover per province, all modes, FY 2024/25

3. GROSS GAMBLING REVENUE PER GAMBLING MODE AND PROVINCE

3.1 A total amount of R74.5 billion was generated during FY 2024/25. GGR increased by 25.6% relative to the previous year. Betting accounted for more than two-thirds of total GGR at 70% (up from a market share of 60% during FY 2023/24). The Western Cape (31%) accounted for the highest amount of GGR generated across provinces, closely followed by Mpumalanga (30%). Both provinces have overtaken Gauteng, previously the largest gambling market, which now stands at 18% market share. The GGR per gambling mode and province is reflected in Figures 3 and 4.

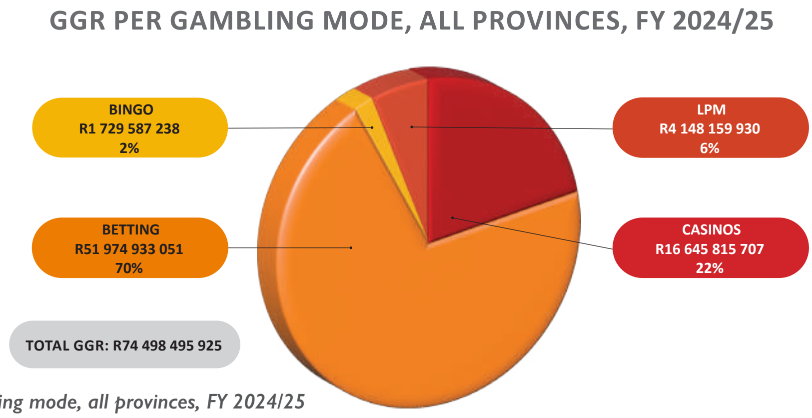


Figure 3: GGR per gambling mode, all provinces, FY 2024/25

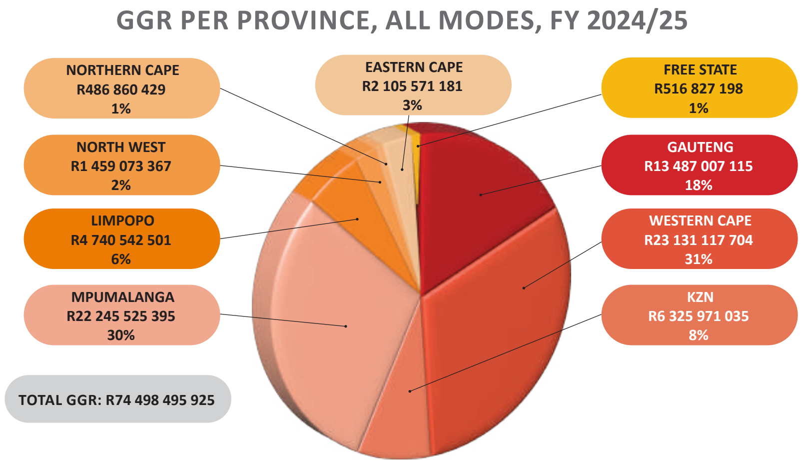


Figure 4: GGR per province, all modes, FY 2024/25

3.2 The figure below provides an estimation of online betting in relation to the other modes. Disaggregated data on online and retail betting were obtained for the Western Cape, Mpumalanga, Limpopo, North West, Eastern Cape, and Northern Cape. Since the remaining provinces did not provide disaggregated statistics, their betting submissions are all contained in the retail betting figure. Based on this estimate and noting the data limitations, 60% of all gambling in South Africa took place online during FY 2024/25. Refer to Figure 5.

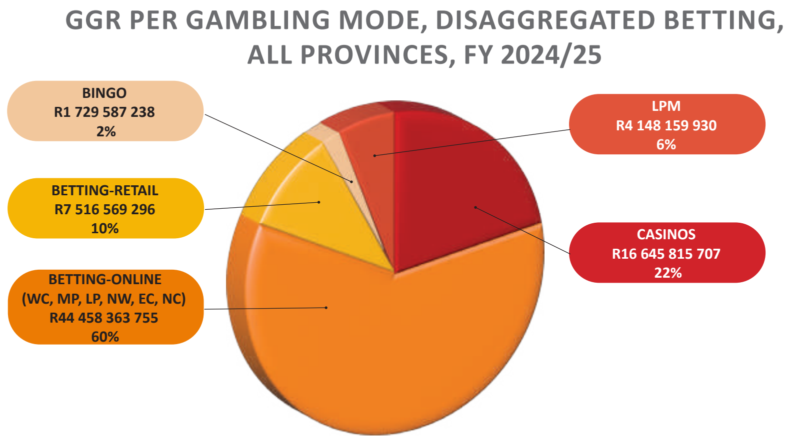


Figure 5: GGR, Gambling on betting online platforms versus land-based gambling, all modes, FY 2024/25

3.3 The quarterly growth trend is shown in Figure 6, showing positive growth each quarter relative to the previous year.

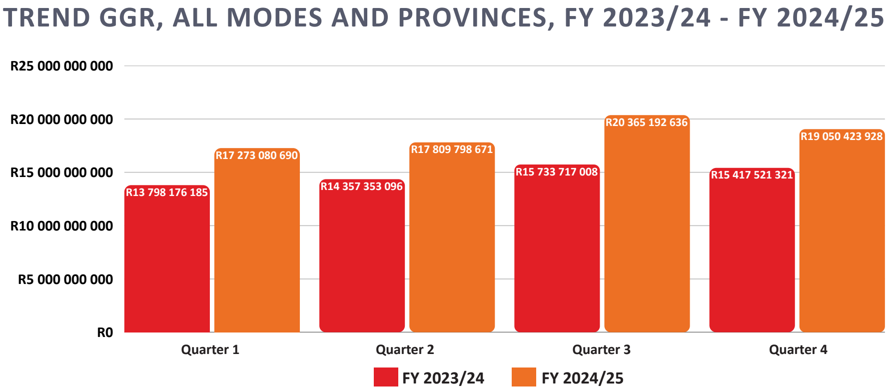


Figure 6: Trend in GGR, all modes and provinces, FY 2023/24 – FY 2024/25

3.4 The trend in aggregate GGR is illustrated in Figure 7. Prior to the pandemic, the gambling industry had been growing at an average annual rate of 7.3%. In FY 2020/21, the gambling industry lost about R10 billion in revenue, down from R23.3 billion in the previous year, with casino GGR declining the most, by 50% from FY 2019/20, owing to the effects of the coronavirus disease 2019 pandemic. The following year, the industry rebounded by 48.1%. Post-pandemic, the gambling industry has shifted to a steeper growth path.

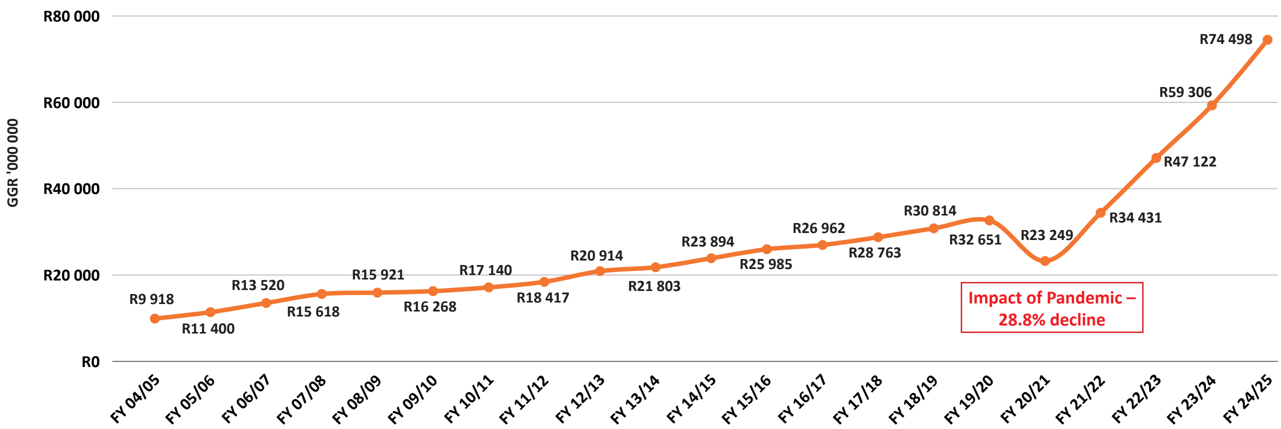
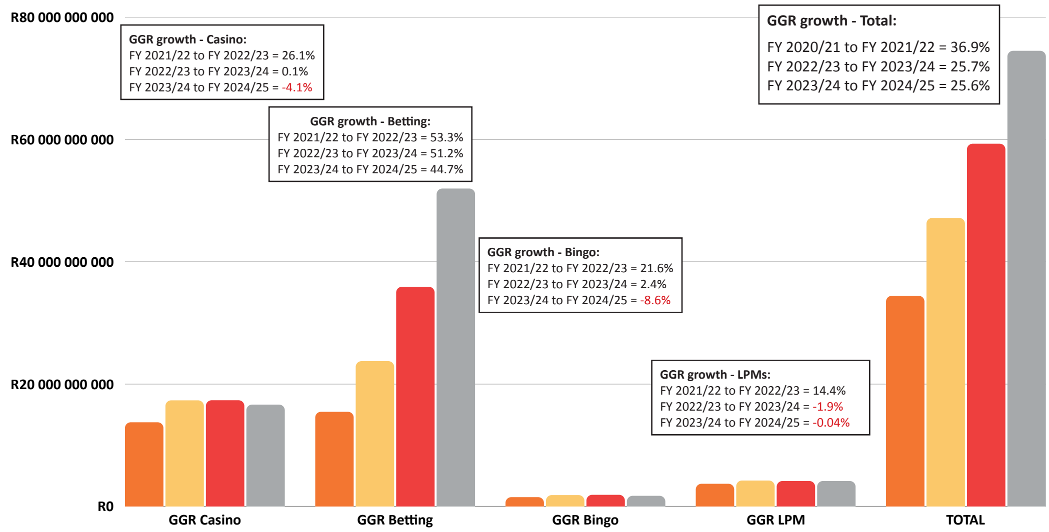


Figure 7: Trend in GGR, all modes, FY 2004/05 to FY 2024/25

3.4.1 Overall, GGR expanded by 25.6% during FY 2024/25 relative to the previous year. This growth was driven solely by the betting sector, which increased by 44.7%, while other gambling modes declined. Casino GGR fell by 4.1%, LPMs declined by 0.04%, and bingo GGR shrank by 8.6%.

3.4.2 At the end of FY 2024/25, the Western Cape, Mpumalanga, Limpopo, and the Northern Cape experienced high growth rates, ranging between 23.2% and 71.3%. Low growth rates were seen in Gauteng, KZN and the North West. The Eastern Cape and Free State's GGR declined by 1.5% and 7.2%, respectively. Refer to Figure 9.

GROWTH IN GGR (ALL MODES): FY 2021/22 - FY 2024/25

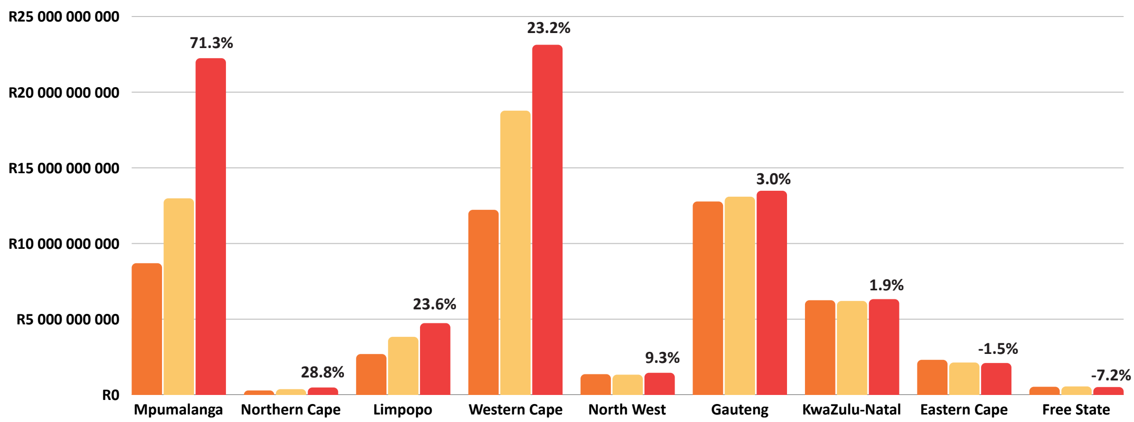


	GGR Casino	GGR Betting	GGR Bingo	GGR LPM	TOTAL
GGR, FY 2021/22	R13 753 507 077	R15 468 352 646	R1 510 403 511	R3 698 726 491	R34 430 989 725
GGR, FY 2022/23	R17 342 258 570	R23 748 237 393	R1 847 180 224	R4 230 348 312	R47 168 024 499
GGR, FY 2023/24	R17 356 154 721	R35 908 575 322	R1 892 333 728	R4 149 703 839	R59 306 767 610
GGR, FY 2024/25	R16 645 815 707	R51 974 933 051	R1 729 587 238	R4 148 159 930	R74 498 495 925

Figure 8: Growth in GGR, all modes (FY 2021/22 – FY 2024/25)

UNEQUAL GROWTH RATE OF GGR BETWEEN PROVINCES (FY 2022/23 - FY 2024/25)

GGR GROWTH WITH SPECIFIC REFERENCE TO GROWTH BETWEEN FY 2023/24 AND FY 2024/25



	Mpumalanga	Northern Cape	Limpopo	Western Cape	North West	Gauteng	KwaZulu-Natal	Eastern Cape	Free State
GGR, FY 2022/23	R8 699 607 570	R292 235 531	R2 698 232 833	R12 227 229 868	R1 368 470 119	R12 776 979 379	R6 254 011 883	R2 315 638 582	R535 618 735
GGR, FY 2023/24	R12 984 893 241	R377 874 957	R3 835 150 809	R18 778 535 038	R1 334 713 440	R13 095 261 666	R6 205 507 561	R2 137 608 817	R557 222 081
GGR, FY 2024/25	R22 245 525 395	R486 860 429	R4 740 542 501	R23 131 117 704	R1 459 073 367	R13 487 007 115	R6 325 971 035	R2 105 571 181	R516 827 198

Figure 9: GGR growth per province (FY 2022/23 – FY 2024/25)

3.4.3 Nationally, there were 50 565 gambling machines available for play in casinos, LPMs, and bingo venues. The majority of the slot machines were located in casinos, which housed 21 370 slot machines. There were 15 743 active LPMs and 13 452 electronic bingo terminals.

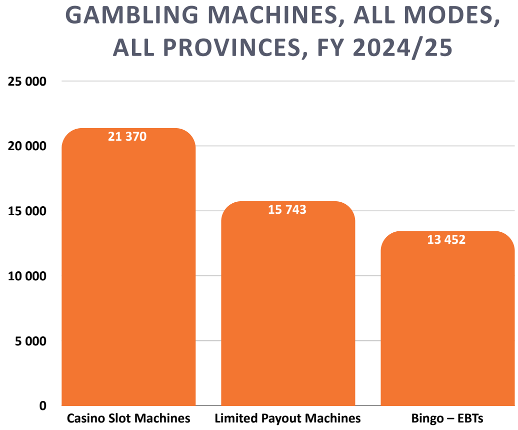


Figure 10: Number of gambling machines in the casino, LPM & bingo sectors

3.4.4 Figure 11 shows the trend in GGR market shares between the modes of gambling over time. In FY 2010/11, casinos accounted for 81.9% of GGR. Their share declined over the years, while other modes of gambling increased in market share. Around FY 2015/16, betting began to pick up, growing at an elevated rate. The pandemic, starting in FY 2019/20, shifted the landscape entirely, with betting rising to 45.6% while casinos dropped to 39.8%. The two modes traded places, with betting taking the lead from that point onwards. The divergence between betting and casinos left the market shares at 69.8% and 22.3%, respectively, while LPMs' and bingo's market shares declined to 5.6% and 2.3%, respectively.

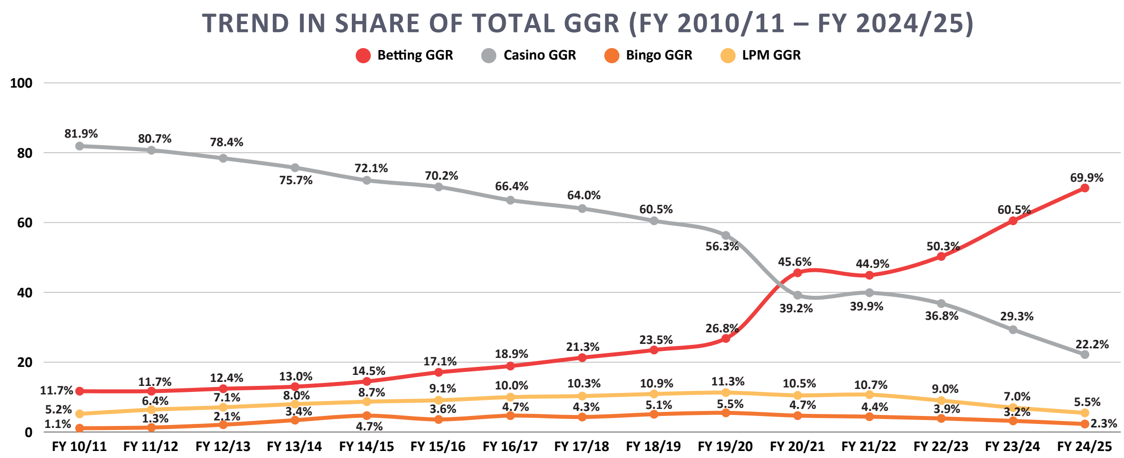


Figure 11: Trend in share of total GGR, comparison of all modes (FY 2010/11 – FY 2024/25)

4. TAXES/LEVIES CONTRIBUTION PER GAMBLING MODE AND PROVINCE

4.1 A total amount of R5.8 billion was collected during FY 2024/25, which is 20.1% higher than the taxes/levies in the previous financial year. At 59%, betting generated the highest share of taxes and levies among gambling modes. The Western Cape (30%) accounts for the largest share of taxes/levies generated across provinces, as depicted in Figures 12 and 13.

TAXES/LEVIES PER GAMBLING MODE, ALL PROVINCES, FY 2024/25

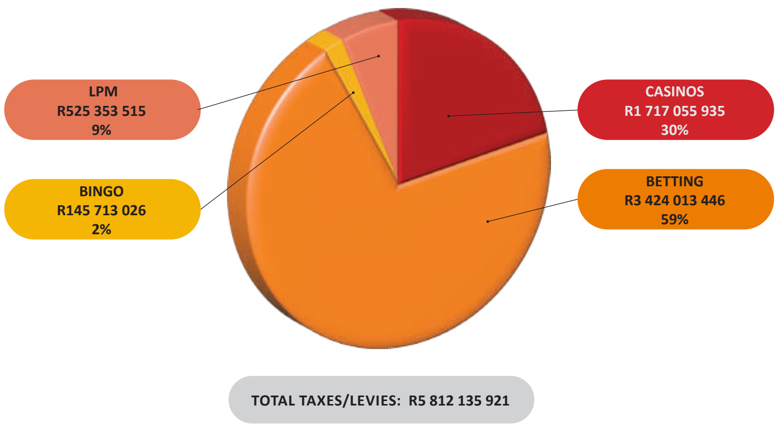


Figure 12: Taxes/levies per gambling mode, all provinces, FY 2024/25

TAXES PER PROVINCE, ALL MODES, FY 2024/25

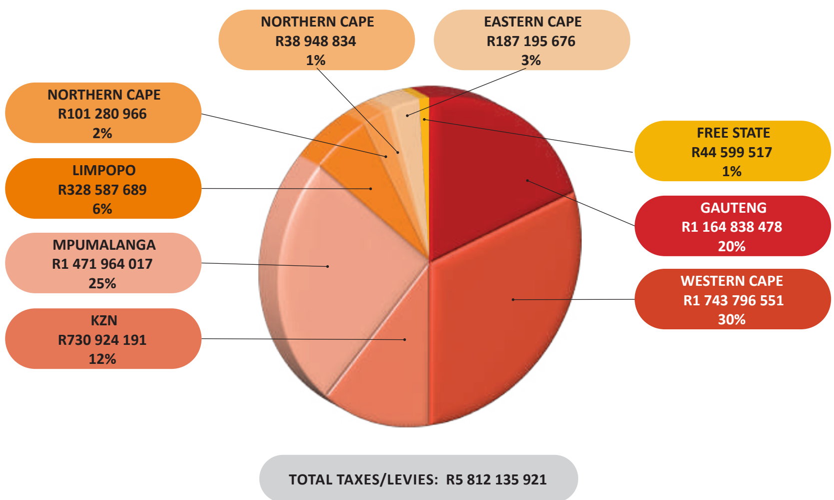


Figure 13: Taxes/levies per province, all modes, FY 2024/25

4.2 Taxes collected from the gambling industry were on an upward trend until FY 2020/21, when they declined by 36.1%. As with GGR, taxes have followed an upward trend, but on a steeper path post-pandemic.

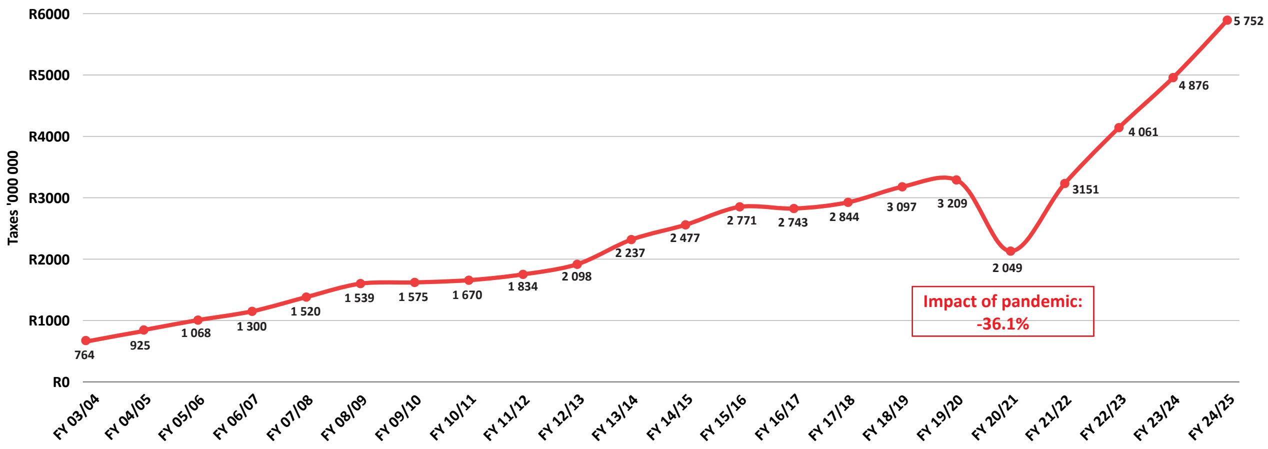


Figure 14: Trend in taxes/levies, all modes, per FY – from FY 2003/04 – FY 2024/25

CHAPTER 2

CASINO SECTOR

I. MARKET CONDUCT

1.1 As at 31 March 2025, a total of 36 casinos (out of a maximum of 41 licences) were operational in South Africa. The Eastern Cape Gambling Board reports that Mayfair Casino ceased operations in January 2025. The Eastern Cape thus currently has four operational casinos.

1.2 Of the total casino market, the majority of casinos are located in Gauteng (20%). The Western Cape and KZN each host five casinos (13.9% each), as reflected in Figure 15.

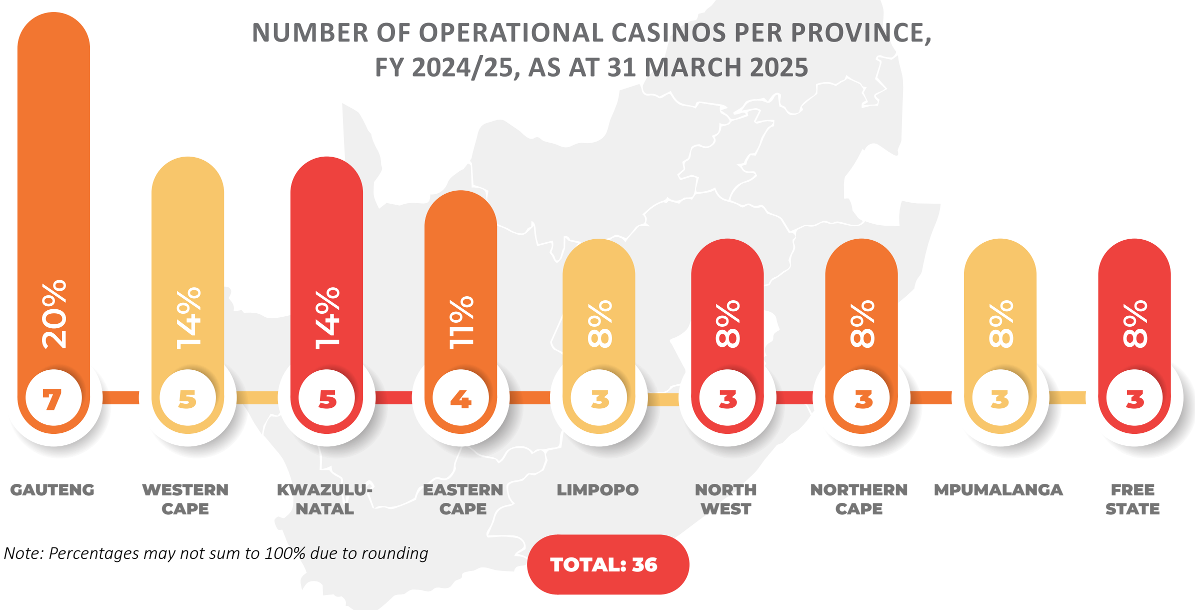


Figure 15: Number of operational casinos per province, FY 2024/25, as at 31 March 2025

1.3 There are a total of 21 370 slot machines throughout the country. Gauteng accounts for the highest number of slot machines in casinos, with 8 226 slot machines (38%) relative to other provinces. KZN and the Western Cape house 18.0% and 16% of the country's slot machines, respectively.

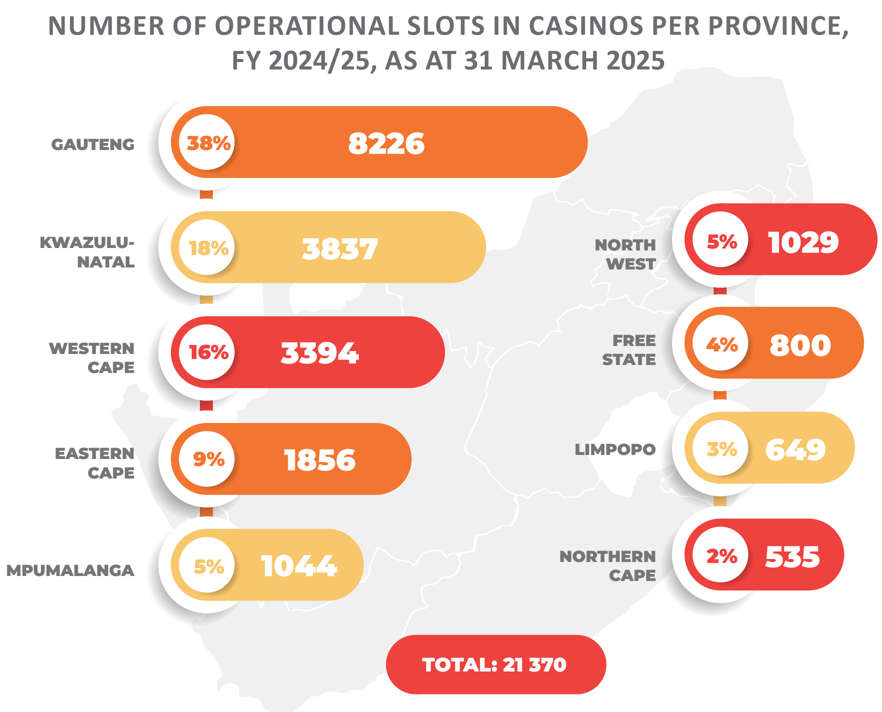


Figure 16: Number of operational slots in casinos per province, FY 2024/25, as at 31 March 2025

1.4 There are 890 operational casino tables throughout the country. The majority are in Gauteng, with 335 tables (38%). The Eastern Cape (13%) and KZN (18%) also house a significant number of casino tables.

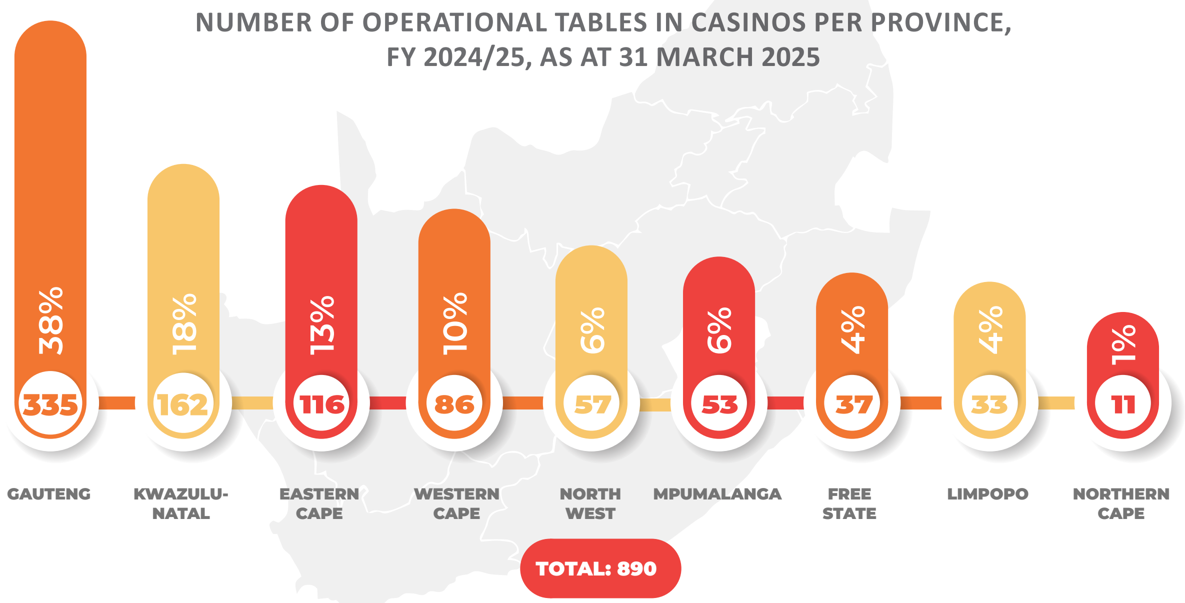


Figure 17: Number of operational tables in casinos per province, FY 2024/25, as at 31 March 2025

2. CASINO SECTOR GAMBLING STATISTICS

2.1 TURNOVER

2.1.1 The total value of money wagered in casinos in FY 2024/25 was R292.8 billion. This accounts for 20% of total turnover across all gambling modes. Casino turnover fell by 1.5% compared with the previous year.

2.1.2 Gauteng (45%) generates the largest share of turnover relative to other provinces. This is followed by money wagered in casinos in KZN (23%) and the Western Cape (16%), as reflected in Figure 18.

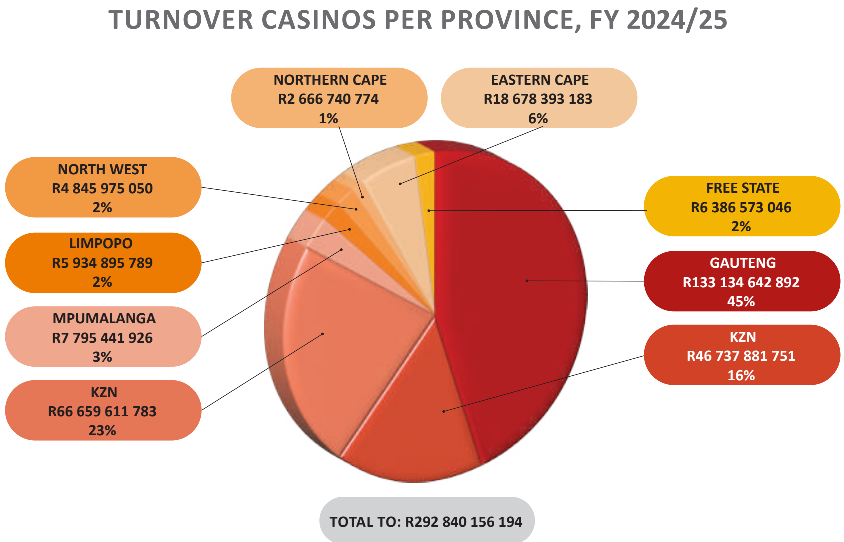


Figure 18: Turnover casinos per province, FY 2024/25

3. GROSS GAMBLING REVENUE

3.1 The total value of GGR generated by casinos in FY 2024/25 was R16.6 billion. This represents 22% of GGR across all gambling modes. Casino GGR declined by 4.1% compared with the previous year.

3.2 Gauteng (45%) generates the largest share of casino GGR relative to other provinces. This is followed by GGR in casinos in KZN (21%) and the Western Cape (16%), as reflected in Figure 19.

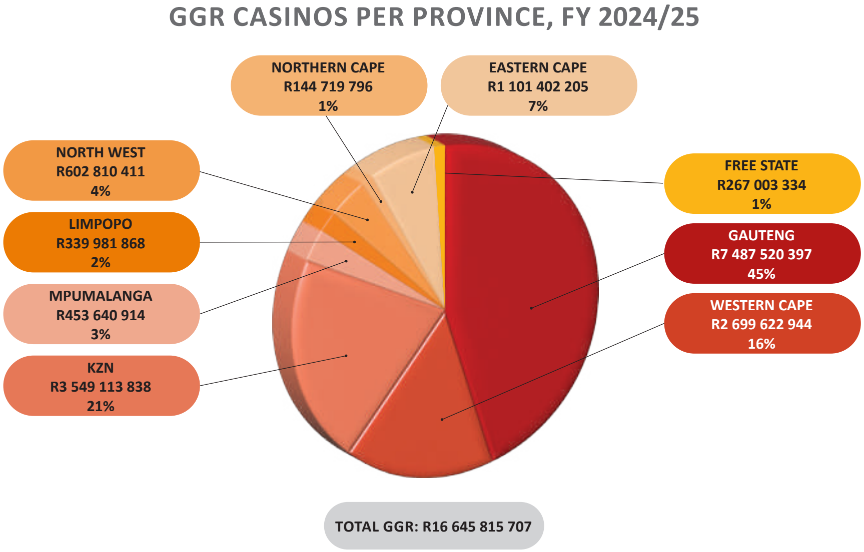


Figure 19: GGR casinos per province, FY 2024/25

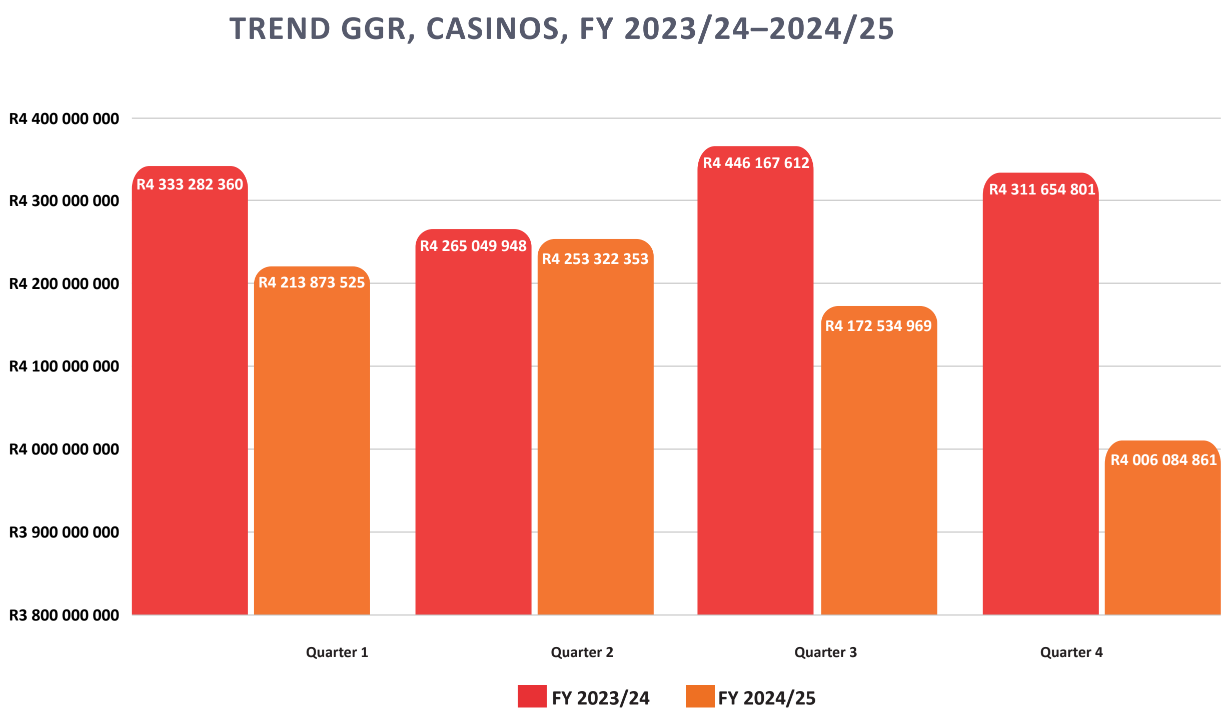


Figure 20: Trend in GGR, casinos, FY 2023/24 - 2024/25

4. TAXES/LEVIES

4.1 The total value of casino taxes/levies generated during FY 2024/25 was R1.7 billion. This amount represents 30% of taxes/levies across all gambling modes. Casino taxes/levies declined by 2.9% relative to the previous year.

4.2 Gauteng (39%) generates the largest share of casino taxes/levies relative to other provinces. This is followed by taxes/levies in casinos in KZN (25%) and the Western Cape (23%), as reflected in Figure 21.

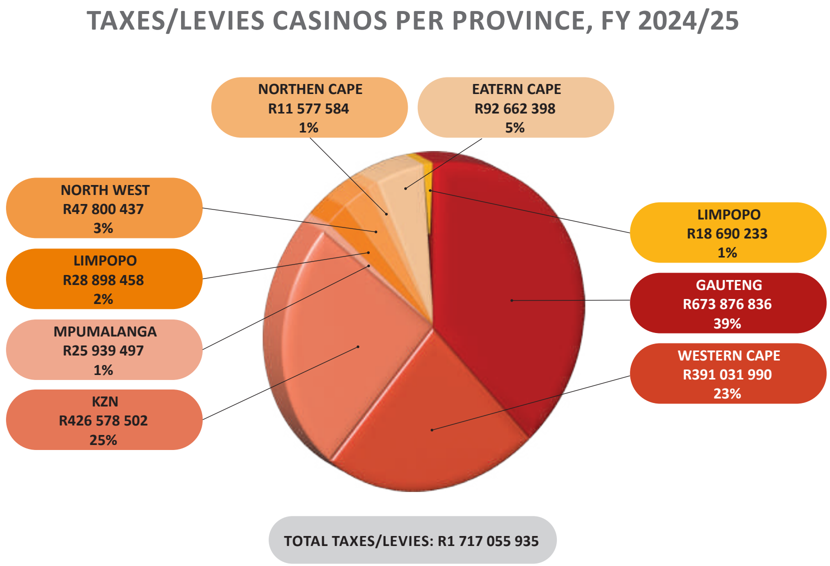


Figure 21: Taxes/levies casinos per province, FY 2024/25

CHAPTER 3

BETTING ON HORSE RACING AND SPORTS SECTOR

1. MARKET CONDUCT

1.1 Each province in the country has one operational totalisator, with the exception of KZN. In KZN, Gold Circle and Ithotho are the totalisators and racecourse operators. 4Racing is the totalisator in all the other provinces. Licensed bookmakers are located in all provinces throughout the Republic. Bets can be placed on horse racing and sports (on and off course), as well as on any other legal contingency.

1.2 The number of licensed operational bookmakers decreased from 349 to 315 over the past financial year, representing a decline of 7.1%. Operational bookmaker outlets increased by 11.9%, from 531 to 594. Operational totalisator outlets increased from 299 to 366. As at 31 March 2025, Gauteng had the highest number of licensed operational bookmakers (140) and totalisator outlets (112).

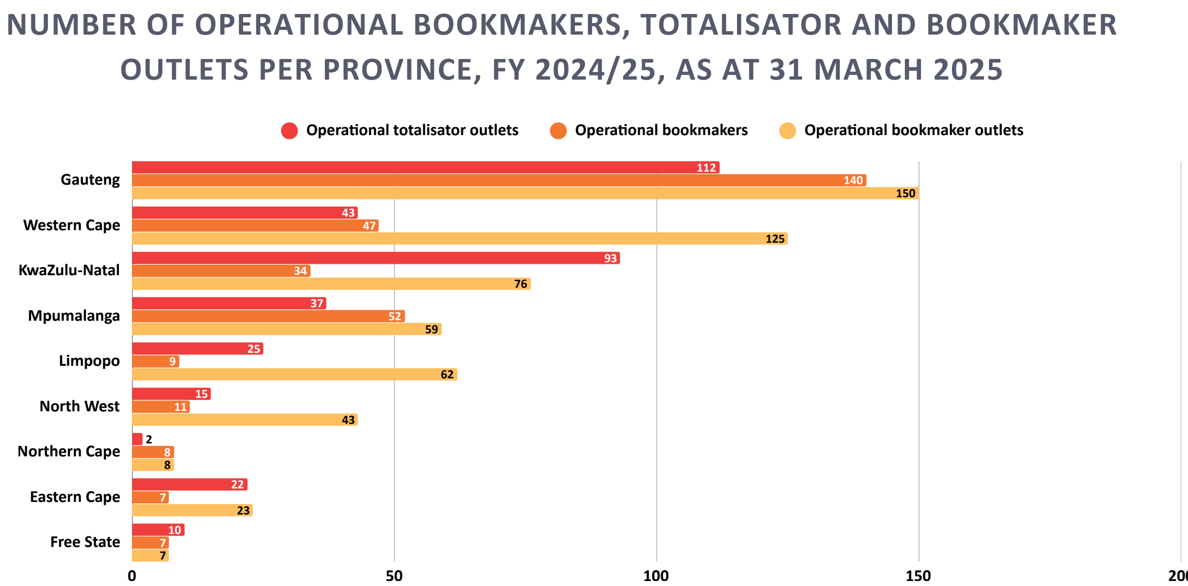


Figure 22: Number of licensed operational bookmakers, totalisator and bookmaker outlets, FY 2024/25, as at 31 March 2025

2. GAMBLING STATISTICS

2.1 TURNOVER

2.1.1 The total value of money wagered in the horse racing and sports betting sector during FY 2024/25 was R1.1 trillion. This amount represents 75% of turnover across all gambling modes, making this is a 47.9% increase from the previous year.

2.1.2 Mpumalanga (54%) accounted for the highest amount of money wagered in the horse racing and sports betting industry, followed by the Western Cape (30%) and Limpopo (10%), as shown in Figure 23.

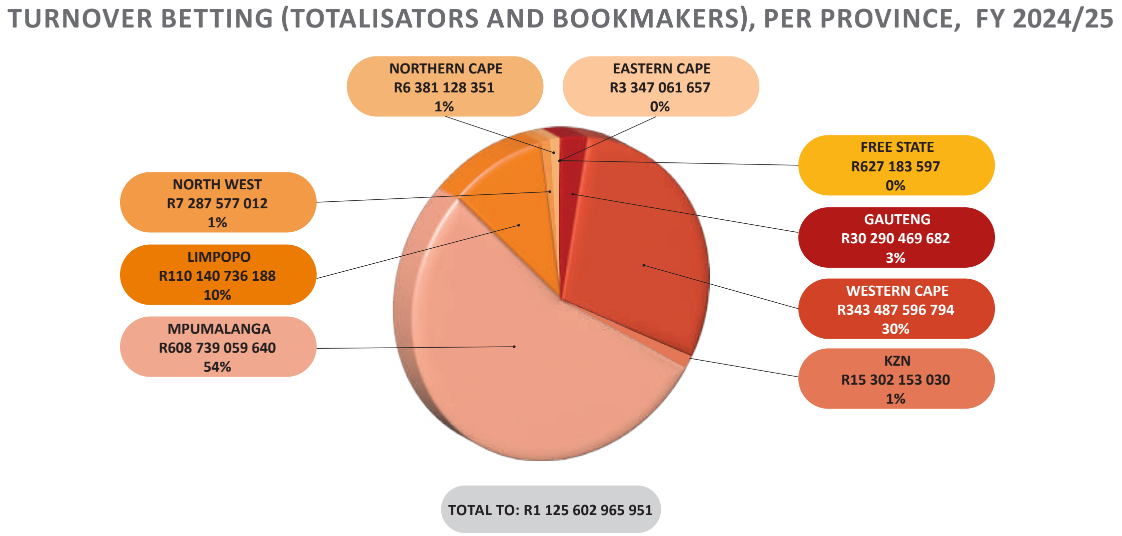


Figure 23: Turnover betting (totalisators and bookmakers), per province, FY 2024/25

3. GROSS GAMBLING REVENUE

3.1 The total value of GGR in the betting on horse racing and sports sector during FY 2024/25 was R52 billion. This amount represents 70% of GGR across all gambling modes, reflecting a 44.7% increase from the previous year.

3.2 As at 31 March 2025, Mpumalanga (41%) accounted for the highest GGR generated in FY 2024/25, followed by the Western Cape (37%) and Gauteng (9%), as reflected in Figure 12.

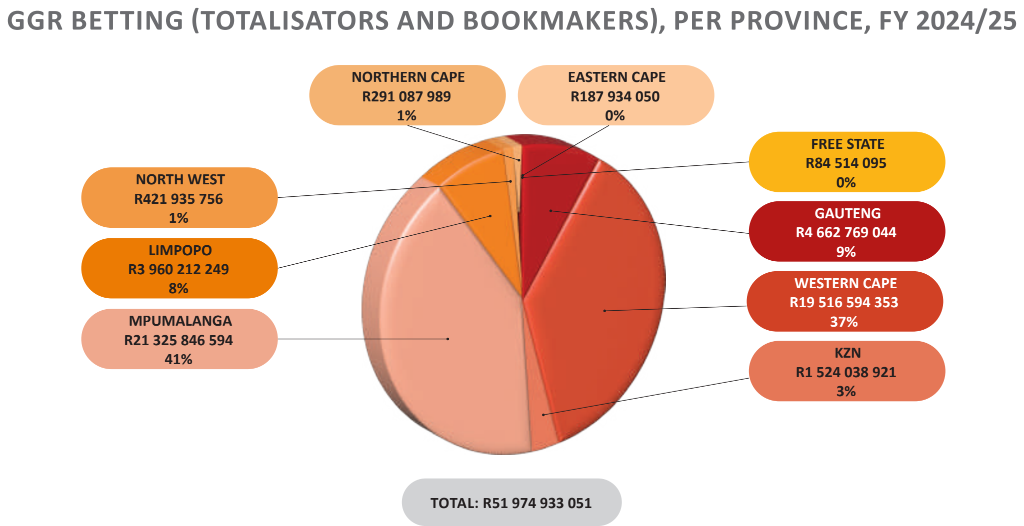


Figure 24: GGR betting (totalisators and bookmakers), per province, FY 2024/25

TREND GGR, BETTING (TOTALISATORS AND BOOKMAKERS), PER QUARTER, FY 2023/24- 24/25

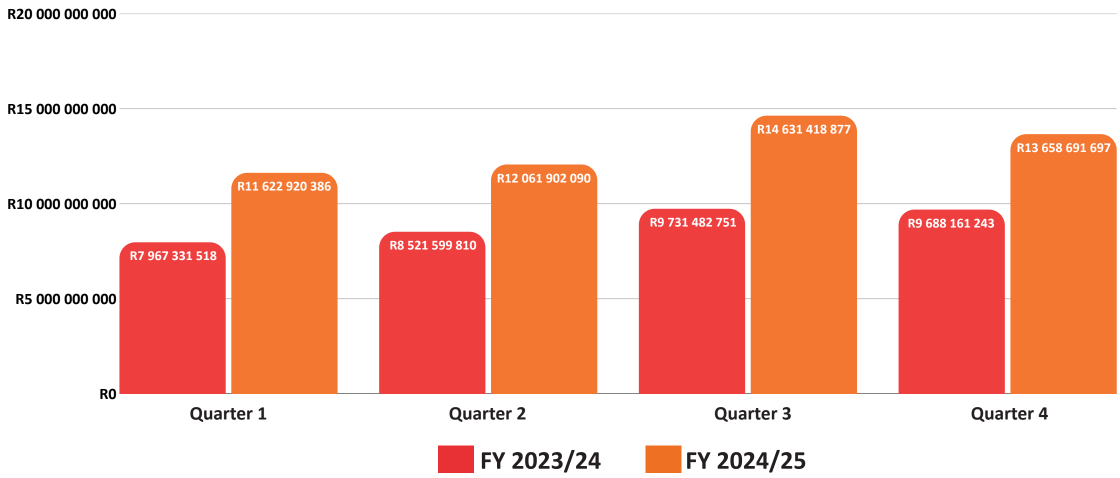


Figure 25: Trend in GGR, betting (totalisators and bookmakers), per quarter, FY 2023/24-24/25

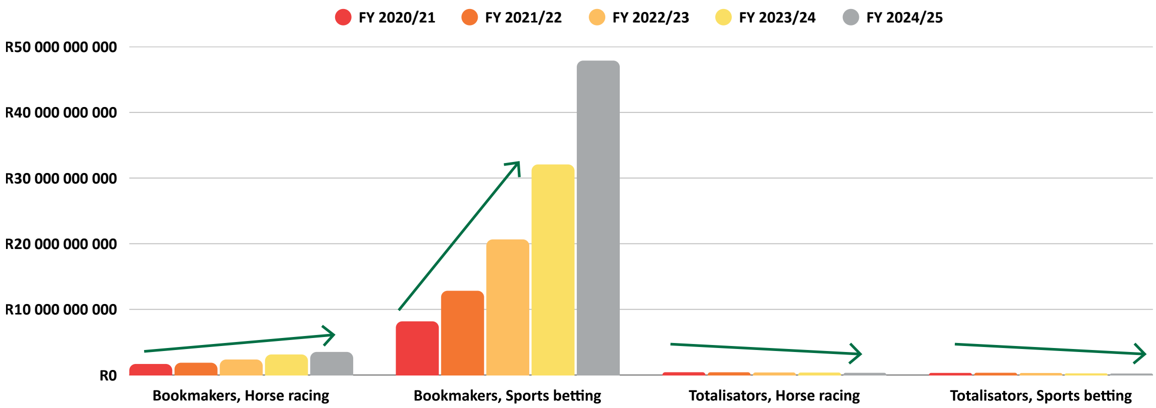
3.3 Bookmakers' horse racing GGR has generally been on an upward trend over the years, rising by 29% in FY 2018/19 and 2% in FY 2019/20, as shown in Figure 14. It fell marginally by 2% in FY 2020/21, the first year of the pandemic, but recovered by 11% the following year. In FY 2022/23, GGR increased by 26%, followed by a 32.5% rise during FY 2023/24. GGR increased by 12.3% in FY 2024/25.

3.4 GGR generated by bookmakers on sports betting has been on a sharp upward trend since FY 2017/18, as shown in Figure 14. GGR growth was 29% in FY 2018/19, increasing again by 39% and 37% in FY 2019/20 and FY 2020/21, respectively. In FY 2021/22, sports betting experienced tremendous growth at 57%, followed by 61% growth in FY 2022/23. Over FY 2023/24, GGR grew by 55.3%, followed by 49.3% growth in FY 2024/25.

3.5 Totalisators' horse racing GGR has been on a downward trend since FY 2018/19. In FY 2018/19, GGR fell by 1%. In FY 2019/20, GGR fell by 15% and saw a drastic decline in FY 2020/21, during the first year of the pandemic, falling by 47%. In FY 2021/22, GGR continued its downward path, falling by 2%, and declined a further 7% in FY 2022/23. The decline continued in FY 2023/24 by 3.3%, followed by 10.6% in FY 2024/25.

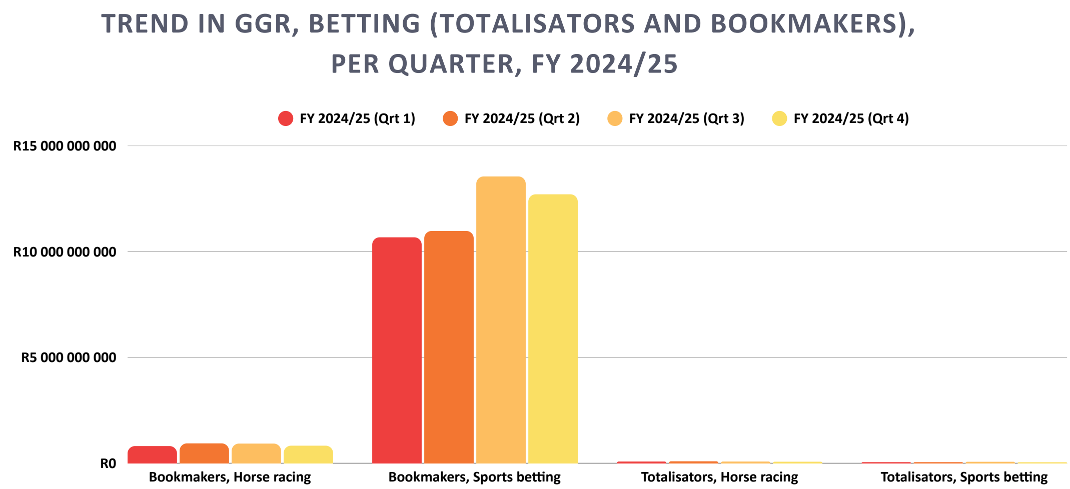
3.6 Totalisators' sports betting GGR was on a downward trend until FY 2020/21, when the trend reversed. In FY 2018/19 and FY 2019/20, GGR fell by 6% and 14%, respectively. In FY 2020/21 and FY 2021/22, GGR increased by 20% and 7%, respectively, but fell by 10% in FY 2022/23. FY 2023/24 saw a further 17.7% decline overall. In FY 2024/25, GGR fell by 9.8%.

TREND IN GGR, BETTING (TOTALISATORS AND BOOKMAKERS), FY 2020/21–FY 2024/25



GGR, FY 2020/21	R1 683 065 295	R8 178 285 690	R426 477 279	R321 792 680
GGR, FY 2021/22	R1 872 054 678	R12 832 845 899	R419 575 899	R343 876 171
GGR, FY 2022/23	R2 364 529 632	R20 655 640 981	R390 157 132	R309 302 377
GGR, FY 2023/24	R3 132 420 216	R32 073 577 088	R377 183 168	R254 563 491
GGR, FY 2024/25	R3 516 361 259	R47 892 027 847	R337 014 035	R229 529 910

Figure 26: Trend in GGR, betting (totalisators and bookmakers), FY 2020/21- FY 2024/25



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
FY 2024/25 (Qrt 1)	R812 817 747	R10 671 569 991	R84 263 524	R54 269 125
FY 2024/25 (Qrt 2)	R940 905 680	R10 971 429 928	R94 796 385	R54 770 098
FY 2024/25 (Qrt 3)	R930 993 835	R13 546 071 575	R83 457 987	R70 895 479
FY 2024/25 (Qrt 4)	R831 643 997	R12 702 956 354	R74 496 139	R49 595 207

Figure 27: Trend in GGR, betting (totalisators and bookmakers), per province (per quarter), FY 2024/25

3.7 The figure below shows the amount of GGR generated from online betting compared with retail betting. Disaggregated data on online and retail betting were provided by the Western Cape, Mpumalanga, Limpopo, North West, Eastern Cape, and Northern Cape. The betting figures for the remaining provinces are therefore included in the retail betting total. Based on this data, online betting constitutes 86% of betting revenue.

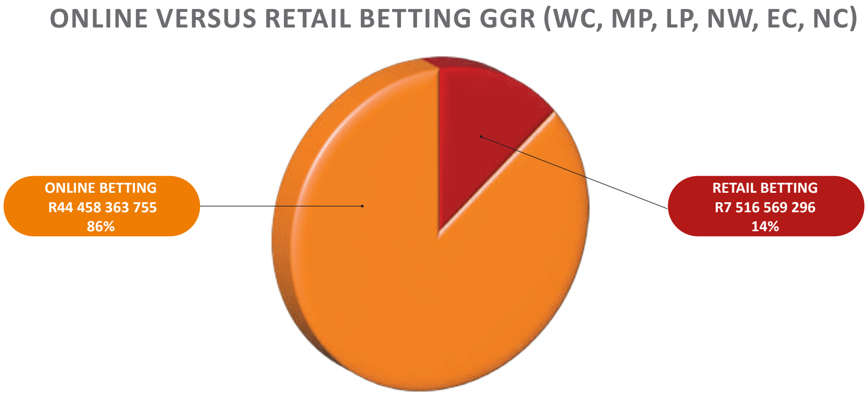


Figure 28: Online versus retail betting, all provinces, FY 2024/25

4. TAXES/LEVIES

4.1 The total value of taxes/levies in the horse racing and sports betting sector for FY 2024/25 was R3.4 billion. This represents 59% of taxes/levies across all gambling modes, marking a 41.8% increase on the same period last year.

4.2 Mpumalanga accounted for the highest amount of taxes collected in the betting industry (41%), followed by the Western Cape (36%) and Gauteng (9%).

TAXES/LEVIES COLLECTED RELEVANT TO BETTING (TOTALISATORS AND BOOKMAKERS), PER PROVINCE, FY 2024/25

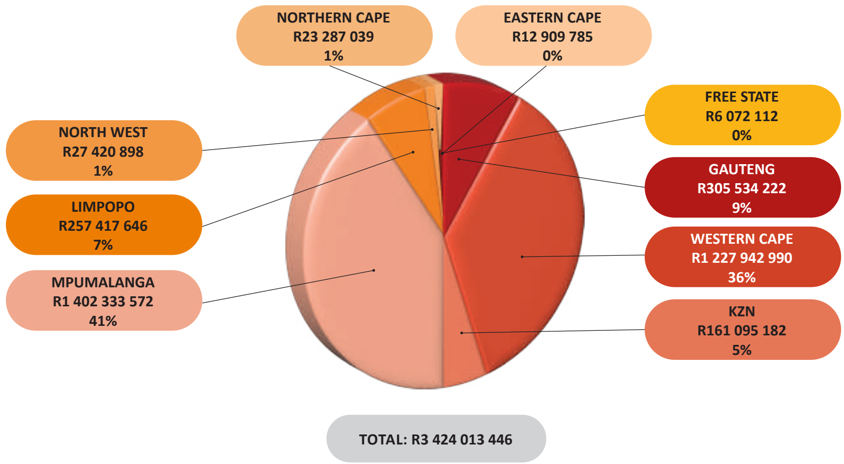


Figure 29: Taxes/levies collected relevant to betting (totalisators and bookmakers), per province, FY 2024/25

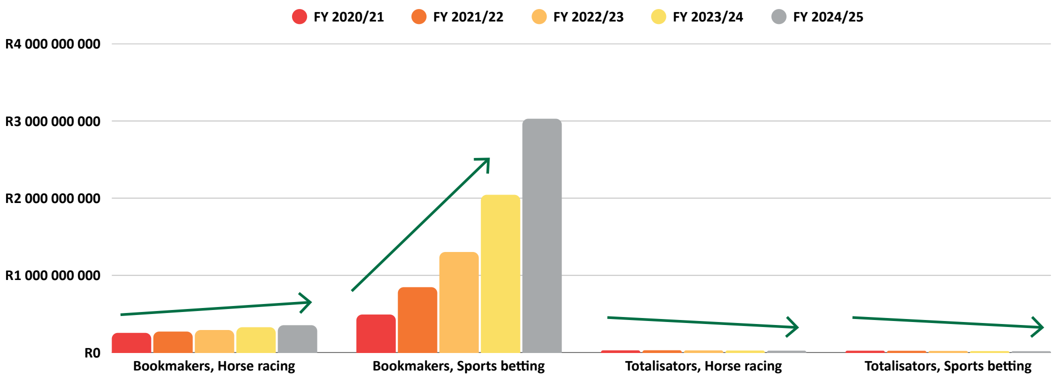
4.3 The collection of taxes/levies from bookmakers offering horse racing increased over the period FY 2018/19 to FY 2022/23. Growth was 3% in FY 2021/22 and 2% in FY 2022/23. Taxes/levies grew by a further 12% in FY 2023/24. In FY 2024/25, taxes increased by 8%.

4.4 Taxes/levies from sports betting bookmakers experienced sharp growth since FY 2018/19, as shown in Figure 17. Growth was 72% in FY 2021/22, followed by 54% in FY 2022/23. During FY 2023/24, gross revenues increased by 60%, followed by a 48% increase in FY 2024/25.

4.5 Totalisators' horse-racing taxes/levies have been on a downward trend since FY 2018/19, falling by a further 6% in FY 2022/23. The decline continued by 7% over the following two years.

4.6 Taxes/levies collected from sports betting via totalisators have also generally been on a downward trend, with the exception of 38% growth in FY 2020/21. Following this, taxes/levies fell by 5% in FY 2021/22 and again by 9% in FY 2022/23. Taxes/levies fell by a further 10% in FY 2023/24 and by 9% in FY 2024/25.

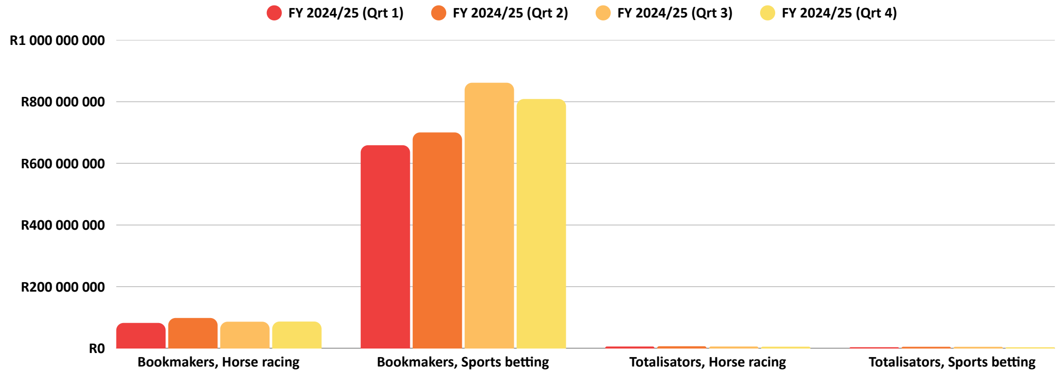
TREND IN TAXES/LEVIES COLLECTED RELEVANT TO BETTING (TOTALISATORS AND BOOKMAKERS), FY 2020/21–FY 2024/25



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
FY 2020/21	R254 481 045	R492 317 133	R28 315 504	R23 708 890
FY 2021/22	R271 481 798	R846 678 613	R29 315 067	R22 596 620
FY 2022/23	R291 719 022	R1 302 474 861	R27 527 538	R20 576 437
FY 2023/24	R327 820 571	R2 043 734 273	R25 711 268	R18 590 288
FY 2024/25	R354 052 978	R3 029 076 280	R23 971 286	R16 912 901

Figure 30: Trend in taxes/levies collected relevant to betting (totalisators and bookmakers), FY 2020/21 – FY 2024/25

TREND IN TAXES/LEVIES COLLECTED RELEVANT TO BETTING (TOTALISATORS AND BOOKMAKERS), FY 2024/25



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
FY 2024/25 (Qrt 1)	R82 396 437	R658 759 256	R5 972 724	R3 601 210
FY 2024/25 (Qrt 2)	R98 439 337	R700 229 780	R6 758 559	R5 025 488
FY 2024/25 (Qrt 3)	R86 337 610	R861 436 306	R5 940 407	R4 841 752
FY 2024/25 (Qrt 4)	R86 879 595	R808 650 938	R5 299 596	R3 444 452

Figure 31: Trend in taxes/levies collected relevant to betting (totalisators and bookmakers), FY 2024/25

4.7 This section presents a figure illustrating the distribution of betting taxes between online and retail transactions. It shows that 84% of taxes/levies were derived from online betting, whereas 16% originated from retail betting.

ONLINE V RETAIL BETTING TAXES/LEVIES, ALL PROVINCES, FY 2024/25

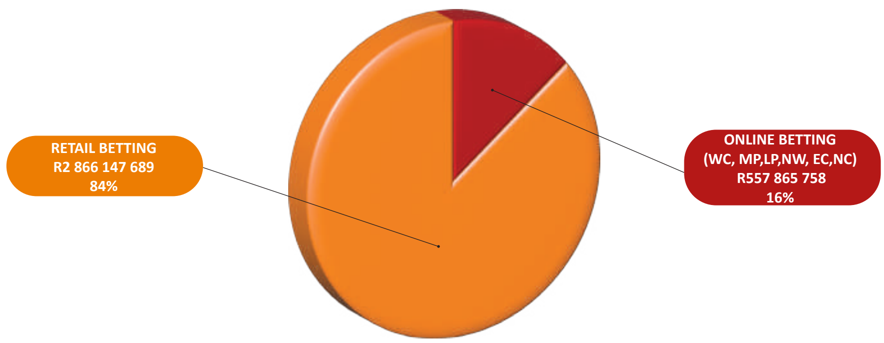


Figure 32: Online versus retail betting taxes/levies, all provinces, FY 2024/25

CHAPTER 4

LIMITED PAYOUT MACHINE SECTOR

1. MARKET CONDUCT

1.1 The main role players in the LPMs sector are categorised into three groups: route and independent operators, site operators, and the National Central Electronic Monitoring System (NCEMS). Route and independent operators are licensed companies authorised to own, manage, and operate LPMs nationwide. Site operators include private hotels, pubs, restaurants, and outlets such as totalisators and bookmakers, located across the country. NCEMS is a centralised system for monitoring and evaluating LPMs.

1.2 A total of 15,743 LPMs were active throughout the country at the end of FY 2024/25. The majority of LPMs were in KZN (20%) and Gauteng (20%). Several provinces saw a reduction in the number of active LPMs compared with the previous year, namely the Western Cape, KZN, and the Northern Cape.

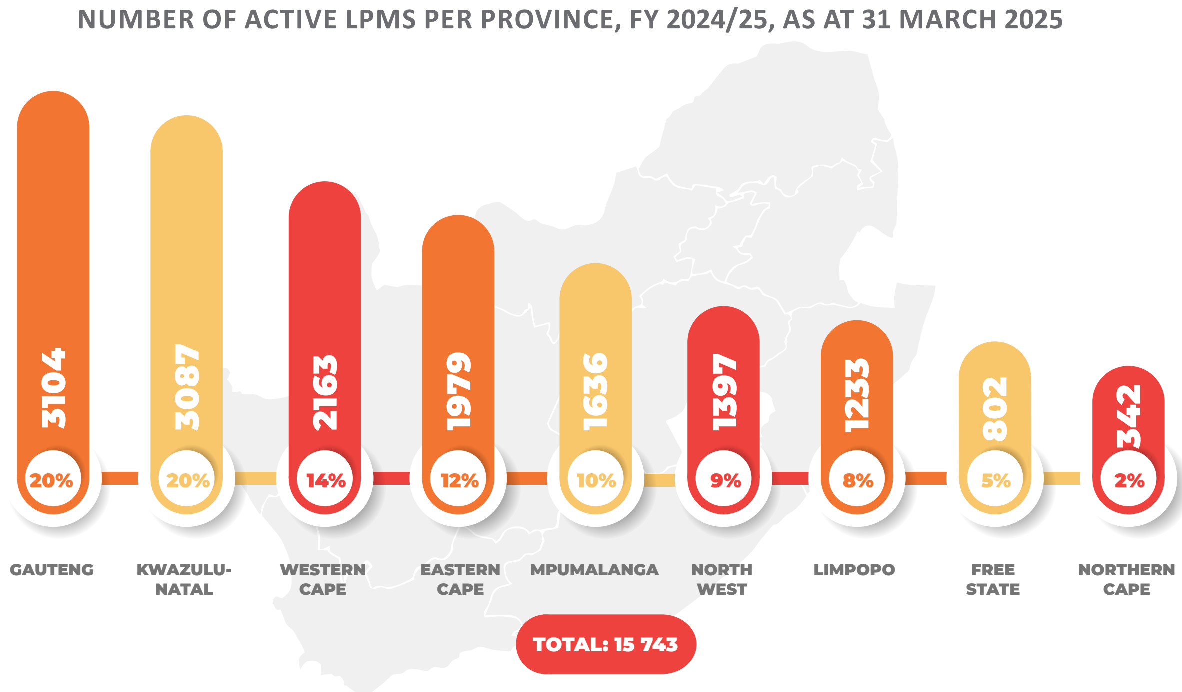
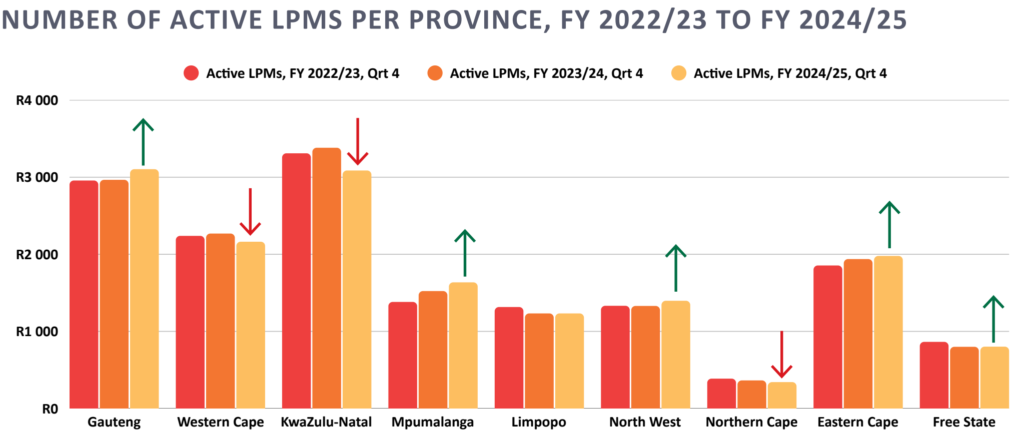


Figure 33: Number of active LPMs per province, FY 2024/25, as at 31 March 2025



	Gauteng	Western Cape	KwaZulu-Natal	Mpumalanga	Limpopo	North West	Northern Cape	Eastern Cape	Free State
Active LPMs, FY 2022/23, Qrt 4	2 957	2 239	3 310	1 382	1 316	1 332	387	1 855	864
Active LPMs, FY 2023/24, Qrt 4	2 966	2 269	3 382	1 523	1 233	1 330	364	1 938	800
Active LPMs, FY 2024/25, Qrt 4	3 104	2 163	3 087	1 636	1 233	1 397	342	1 979	802

Increased Decreased No change

from FY 2023/24 to FY 2024/25

Figure 34: Number of licensed active LPMs per province, FY 2022/23 to FY 2024/25

2. LPMs GAMBLING STATISTICS

2.1 TURNOVER

2.1.1 The total value of money wagered in the LPMs sector during FY 2024/25 was R54.7 billion, a 1.8% increase relative to the previous year. The amount represents 4% of the turnover across all gambling modes.

2.1.2 The highest amounts of money wagered in the LPMs sector were in the Western Cape (22%), followed by KwaZulu-Natal (21%) and Gauteng (20%), as reflected in Figure 35.

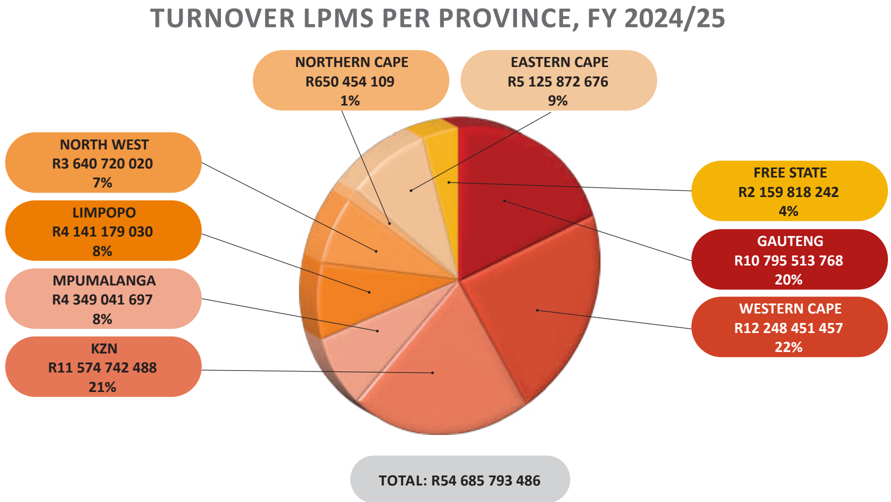


Figure 35: Turnover LPMs per province, FY 2024/25

3. GROSS GAMBLING REVENUE

3.1 The total value of GGR generated in the LPMs sector during FY 2024/25 was R4.1 billion. This represents a 0.04% decline compared with the previous year. This amount represents 6% of the total GGR generated by all gambling modes.

3.2 The Western Cape generated the highest GGR in the LPMs sector at 22%, followed by KZN (21%) and Gauteng (19.8%), as shown in Figure 36.

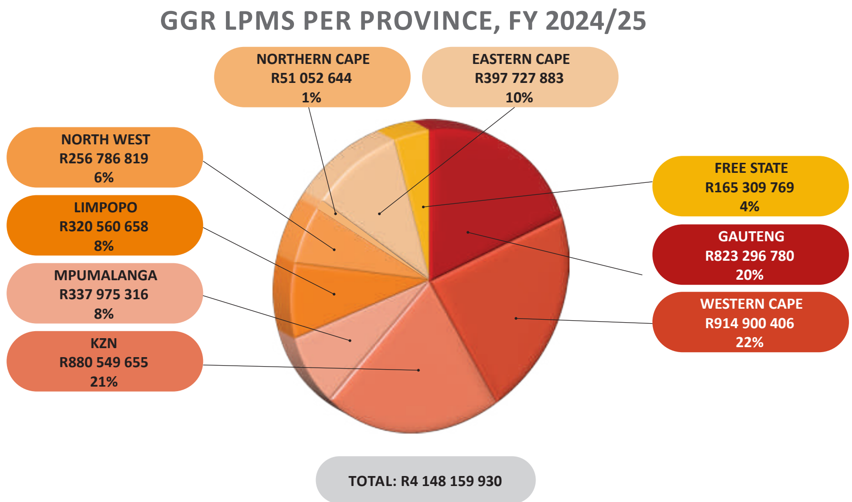


Figure 36: GGR LPMs per province, FY 2024/25

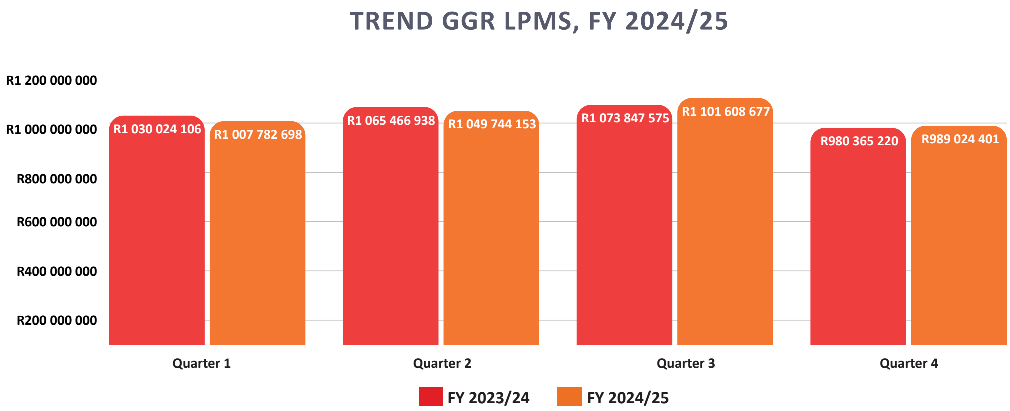


Figure 37: Trend in GGR LPMs, FY 2024/25

4. TAXES/LEVIES

4.1 The total value of taxes/levies collected by PLAs from the LPMs sector during FY 2024/25 was R492.0 million. This amount represents 9% of taxes/levies from all gambling modes. LPMs' taxes/levies decreased by 1% relative to the previous year.

4.2 KwaZulu-Natal has the highest number of licensed active LPMs in comparison with other provinces and accounted for 27% of the taxes collected during FY 2024/25, as reflected in Figure 38.

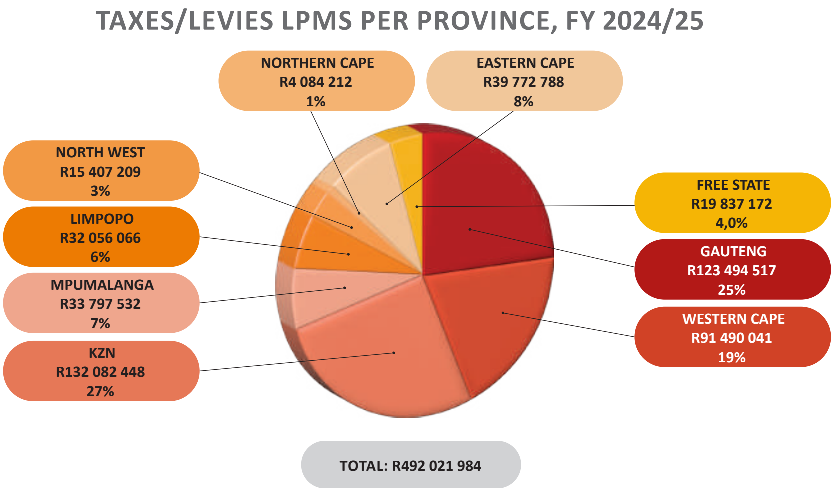


Figure 38: Taxes/levies LPMs per province, FY 2024/25

CHAPTER 5
BINGO SECTOR

1. MARKET CONDUCT

1.1 Of the nine provinces in South Africa, Bingo has been rolled out in six provinces, namely Gauteng, Mpumalanga, Limpopo, North West, Eastern Cape, and KZN. A total number of 74 bingo halls were operational as at 31 March 2025, of which 20 were operational in Gauteng, 15 in the Eastern Cape, 17 in KZN, seven in North West, eight in Mpumalanga and seven in Limpopo, as reflected in Figure 39.

1.2 The number of operational bingo positions is reflected in Figure 40. All bingo positions were electronic bingo terminals, with the majority situated in Gauteng.

NUMBER OF OPERATIONAL BINGO OUTLETS PER PROVINCE, FY 2024/25 AS AT 31 MARCH 2025

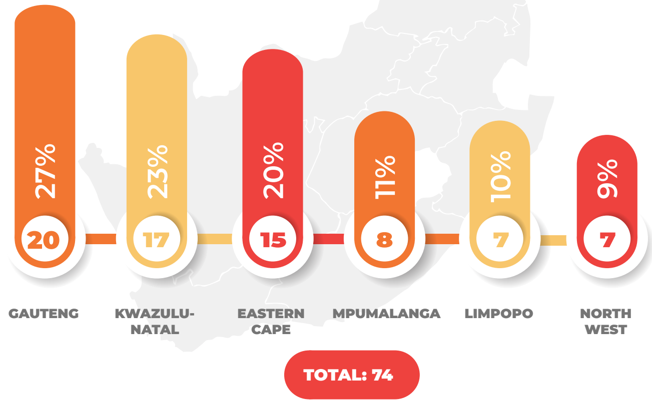
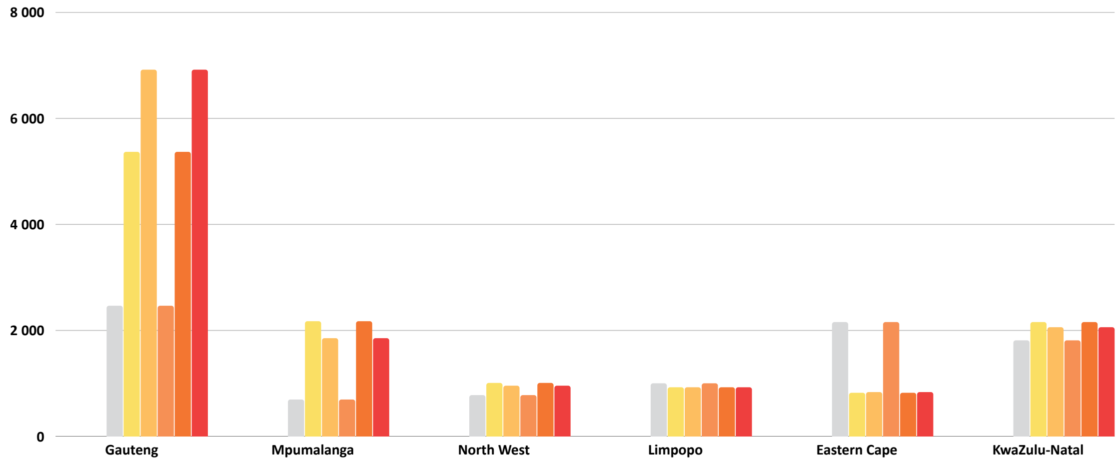


Figure 39: Number of operational bingo outlets per province, FY 2024/25, as at 31 March 2025

NUMBER OF OPERATIONAL BINGO POSITIONS PER PROVINCE, FY 2022/23 TO FY 2024/25 (AS AT 31 MARCH 2025)



	Gauteng	Mpumalanga	North West	Limpopo	Eastern Cape	KwaZulu-Natal
Operational traditional bingo positions, FY 2022/23	0	0	0	0	0	0
Operational traditional bingo positions, FY 2023/24	0	0	0	0	0	0
Operational traditional bingo positions, FY 2024/25	0	0	0	0	0	0
Operational EBTs, FY 2022/23	2466	697	780	1003	2158	1813
Operational EBTs, FY 2023/24	5369	2174	1010	928	824	2158
Operational EBTs, FY 2024/25	6919	1854	958	928	837	2061
Operational bingo positions, FY 2022/23	2466	697	780	1003	2158	1813
Operational bingo positions, FY 2023/24	5369	2174	1010	928	824	2158
Operational bingo positions, FY 2024/25	6919	1854	958	928	837	2061

Increased Decreased No change

from FY 2023/24 to FY 2024/25

Figure 40: Number of operational bingo positions per province, FY 2022/23 to FY 2024/25 (as at 31 March 2025)

2. BINGO GAMBLING STATISTICS

2.1 TURNOVER

2.1.1 The total value of money wagered in the bingo sector during FY 2024/25 was R27.5 billion, representing a 9.0% decline relative to the previous year. This amount represents 2% of turnover across all gambling modes.

2.1.2 Bingo is offered for play in six provinces, namely Gauteng, KZN, Mpumalanga, Limpopo, North West, and the Eastern Cape. The highest amount of money wagered in FY 2024/25 was recorded in the Eastern Cape (28%), followed by KZN (25%) and Gauteng (20%), as reflected in Figure 41.

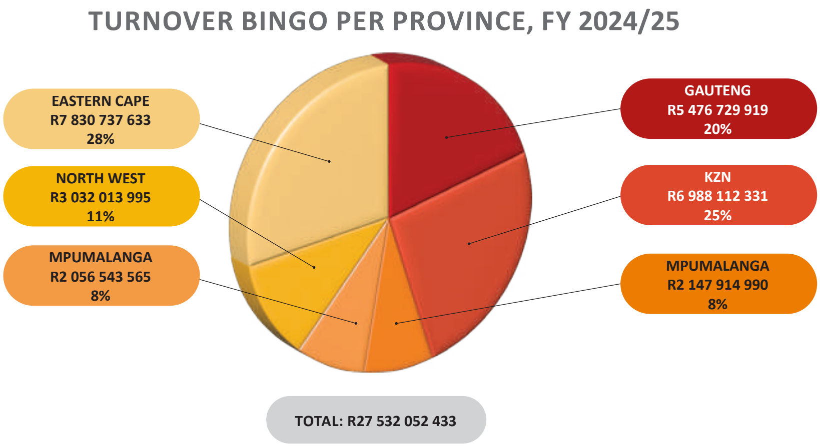


Figure 41: Turnover bingo per province, FY 2024/25

3. GROSS GAMBLING REVENUE

3.1 The total GGR generated in the bingo sector during FY 2024/25 was R1.7 billion, an 8.4% decrease from the previous year. This represents 2% of GGR across all gambling modes.

3.2 Gauteng (30%) generated the highest GGR in FY 2024/25, followed by the Eastern Cape (24%) and KZN (22%), as shown in Figure 42.

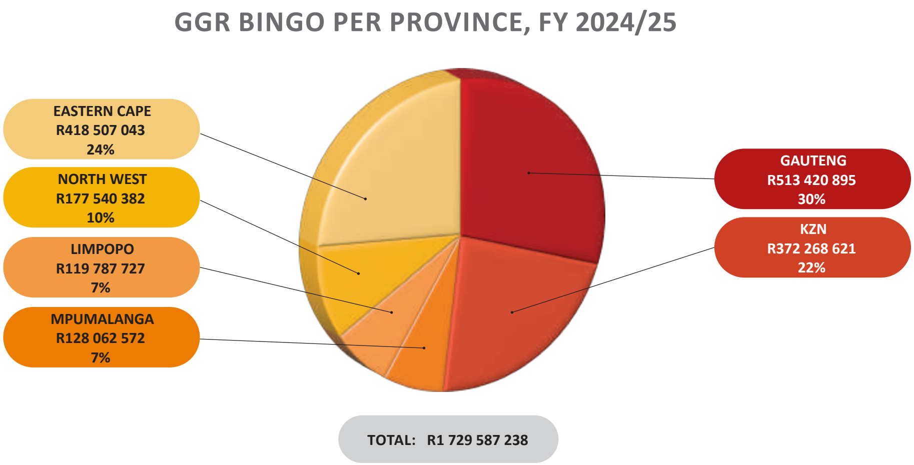


Figure 42: GGR bingo per province, FY 2024/25

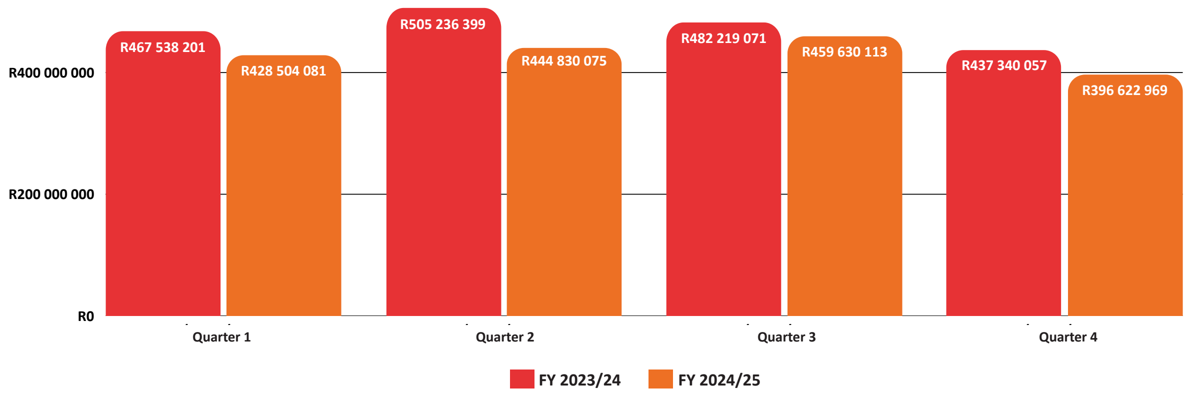


Figure 43: Trend in GGR, Bingo, FY 2024/25

4. TAXES/LEVIES

4.1 The total value of taxes/levies from the bingo sector in FY 2024/25 was R145.7 million, representing a 10.3% decrease from the previous year. This amount represents 3.0% of taxes/levies across all gambling modes.

4.2 Gauteng accounted for the highest proportion of taxes/levies collected in FY 2024/25, at 42%, followed by the Eastern Cape (29%), as shown in Figure 44.

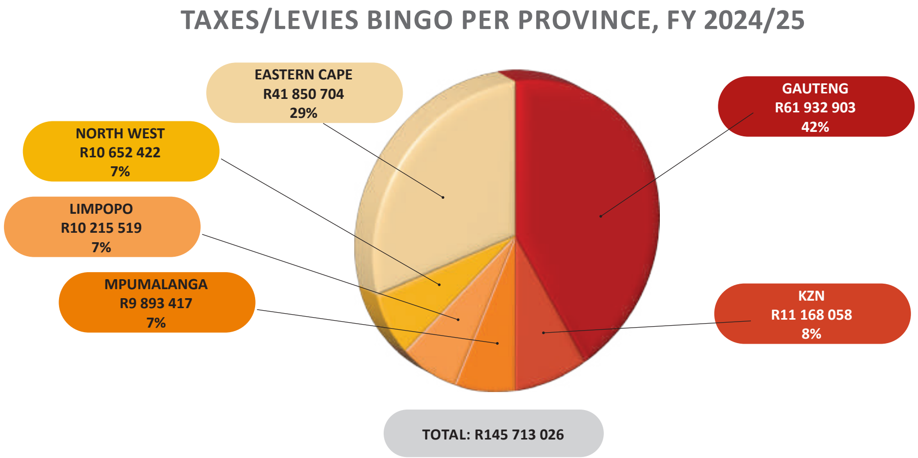


Figure 44: Taxes/levies bingo per province, FY 2024/25

CHAPTER 6

EMPLOYMENT

DIRECT EMPLOYMENT

1. The NGB monitors direct employment numbers in the gambling sector (industry and regulators). A total of 33,169 people were employed in the gambling industry (including regulators) in direct employment as at 31 March 2025, representing a 3% decrease from the FY 2023/24 level of 34,316. The casino and bookmaker sectors accounted for the highest number of direct employees in the gambling industry, as reflected in Table 3.

Table 3: Direct Employment per Province and Mode, FY 2024/25

Gambling mode	Gauteng	Western Cape	KwaZulu-Natal	Mpuma-langa	Limpopo	North West	Northern Cape	Eastern Cape	Free State	TOTAL
Casinos	3,450	2,604	5,349	351	333	443	246	542	441	13,759
Totalisators	185	139	587	37	60	14	4	13	45	1084
Bookmakers	5,516	1,302	2,432	1,145	1,013	687	397	246	161	12,899
LPM	644	65	95	320	882	114	23	724	27	2,894
Bingo	242	N/A	586	191	196	182	N/A	407	N/A	1,804
REGULATORS										
PLAs	110	65	143	77	66	81	18	55	114	729
TOTAL	**10,147**	**4,175**	**9,192**	**2,121**	**2,550**	**1,521**	**688**	**1,987**	**788**	**33,169**

CHAPTER 7

TRANSFORMATION BROAD-BASED BLACK ECONOMIC EMPOWERMENT (B-BBEE) LEVELS

TRANSFORMATION

1. Broad-Based Black Economic Empowerment (B-BBEE) is an economic and political imperative in South Africa. Empowerment in the South African gambling industry is measured in terms of the Codes of Good Practice published by **the dtic**. To date, the gambling industry does not have its own transformation charter. Gambling enterprises are therefore measured in terms of the generic scorecard and, more specifically, the following: Ownership, Management Control, Employment Equity, Skills Development, Preferential Procurement, Enterprise Development, and Socio-Economic Development. However, on 11 October 2013, **the dtic** released the revised B-BBEE Codes of Good Practice. The old and new codes have been merged to monitor contributor levels applicable to 2018, as follows:
   - ownership;
   - management control;
   - skills development;
   - enterprise (supplier) development; and
   - socio-economic development.

2. Based on the information submitted by PLAs, the average B-BBEE status (contributor level) of the South African gambling industry as at 31 March 2025, per gambling mode and operator, was as follows:
   - Average B-BBEE level for casino operators: Level 1.7
   - Average B-BBEE level for totalisators: Level 4.5
   - Average B-BBEE level for LPM operators: Level 2.4
   - Average B-BBEE level for bingo operators: Level 3.1 (currently only operational in Gauteng, Mpumalanga, North West, Eastern Cape, KwaZulu-Natal and Limpopo)

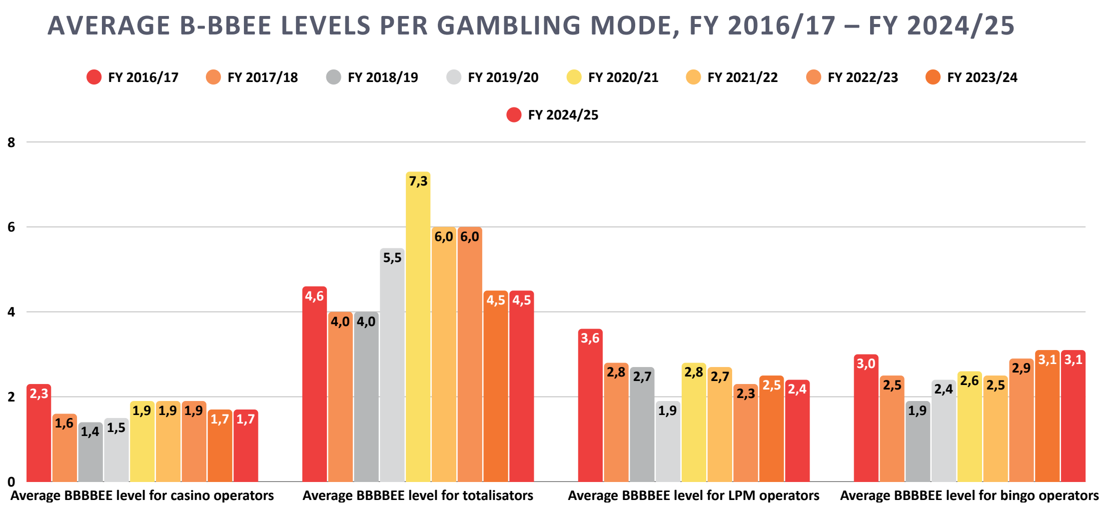


Figure 45: Average B-BBEE Levels per Gambling Mode, FY 2016/17 – FY 2024/25

NOTES

NOTES

NOTES


10€

National Gambling Board
South Africa
a member of **the dtic** group

1085 Francis Baard Street
Pretoria
Hatfield
0028

Private Bag x27
Hatfield
0028

Telephone: 010 003-3475
Email: info@ngb.org.za