



The South African Gambling Industry Financial Performance

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National Gambling Board**





OBJECTIVES FOR REGULATION



- Protection of investors/consumers to help build investor confidence in the market;
- Ensuring market fairness, market efficiency and market transparency;
- Reduction of systemic risk;
- Protection of services businesses from malpractices of some consumers (e.g. perpetrators of money-laundering activities); and,
- Maintenance of consumer confidence in the Industry
- Regulation supports transformation and responsible gambling while curbing illegal operations.



13 November 2025 — 14 November 2025

REGULATORY FRAMEWORK

- The National Gambling Act (NGA) sets the national norms and standards for regulating gambling in South Africa. The National Gambling Board (NGB) ensures uniform, fair, and responsible regulation under the NGA.
- Each province has its own legislation for licensing and compliance monitoring, which must align with the NGA.
- Oversight of nine Provincial Licensing Authorities (PLAs) ensures compliance with national norms and standards.
- Balancing economic gains with social protection remains the core of the regulation.



13 November 2025 — 14 November 2025

ROLE OF NGB



The NGBs mandate is to **exercise oversight** of the gambling industry in South Africa. To promote and support the development of a fair, **transparent**, competitive, sustainable, **responsible** and efficient **gambling industry**.

- Advise National Gambling Policy Council (NGPC) on matters of national policy and legislative changes and determination of national norms and standards regarding any matter in terms of the NGA which should apply generally throughout the Republic.
- Advising and providing recommendations to the NGPC on, the maximum number of any kind of licenses pertaining to any mode that should be awarded within any province of the Republic.
- Conducting oversight evaluation of the performance of PLAs so as to ensure that the national norms and standards established by the NGA are applied uniformly and consistently throughout the Republic of South Africa.
- Assisting PLAs to ensure that the unlicensed gambling activities are detected.
- Monitoring of market conduct and market share.
- Monitoring socio-economic patterns of gambling activity and addictive or compulsive gambling.
- Establishing and maintaining national registers and, through the National Central Electronic Monitoring System (NCEMS) monitoring and analysing every transaction in the Limited Payout Machine (LPM) sector.
- Provide a broad-based public education programme on the socio-economic effect of gambling



ROLE OF NGB



The work of NGB is not only about regulating for compliance — it's about ensuring that gambling in South Africa supports economic growth while protecting people and communities.

ROLE OF OTHER STAKEHOLDERS





13 November 2025 — 14 November 2025

OVERVIEW OF THE SOUTH AFRICAN GAMBLING INDUSTRY



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GAMBLING INDUSTRY



The **SA** regulated **Gambling Industry** is made up of:

- National Lottery (**regulated by the National Lotteries Commission-NLC**)

- Casinos

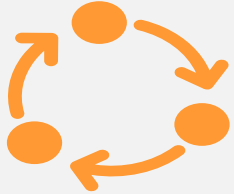
- Betting on Horse-racing and Sport

- Bingo

- Limited Payout Machines (LPMs) - (slot machines located outside casinos with maximum stake of R5 and prize R500)

**Regulated by
the National
Gambling
Board-NGB**

GAMBLING METRICS



R1.5

**Trillion
Gambling
Turnover in
FY2024/25**

Turnover is the rand value of money wagered. This includes "recycling" which refers to amounts that are staked on more than one occasion).



R75

Billion

**Gross
Gambling
Revenue
(GGR)**

The Rand value of the gross revenue of an operator in terms of turnover less winnings paid to players



R5.8

Billion

**Taxes and
Levies
collected**

Gambling tax levied by and collected by provincial licensing authorities



60%

**Total GGR
from Online
Betting in
FY2024/25**



0.83%

**Contribution to
GDP in
FY2023/24**



31%

**Problem Gambling
Prevalence
in FY2023/24**



33169

**Direct
Employment in
the Gambling
Industry in
FY2024/25**



22

**Number of
illegal gambling
raids in
FY2024/25**



65.7%

**Gambling
Prevalence
in FY2023/24
(incl. National
Lottery)**



3 million

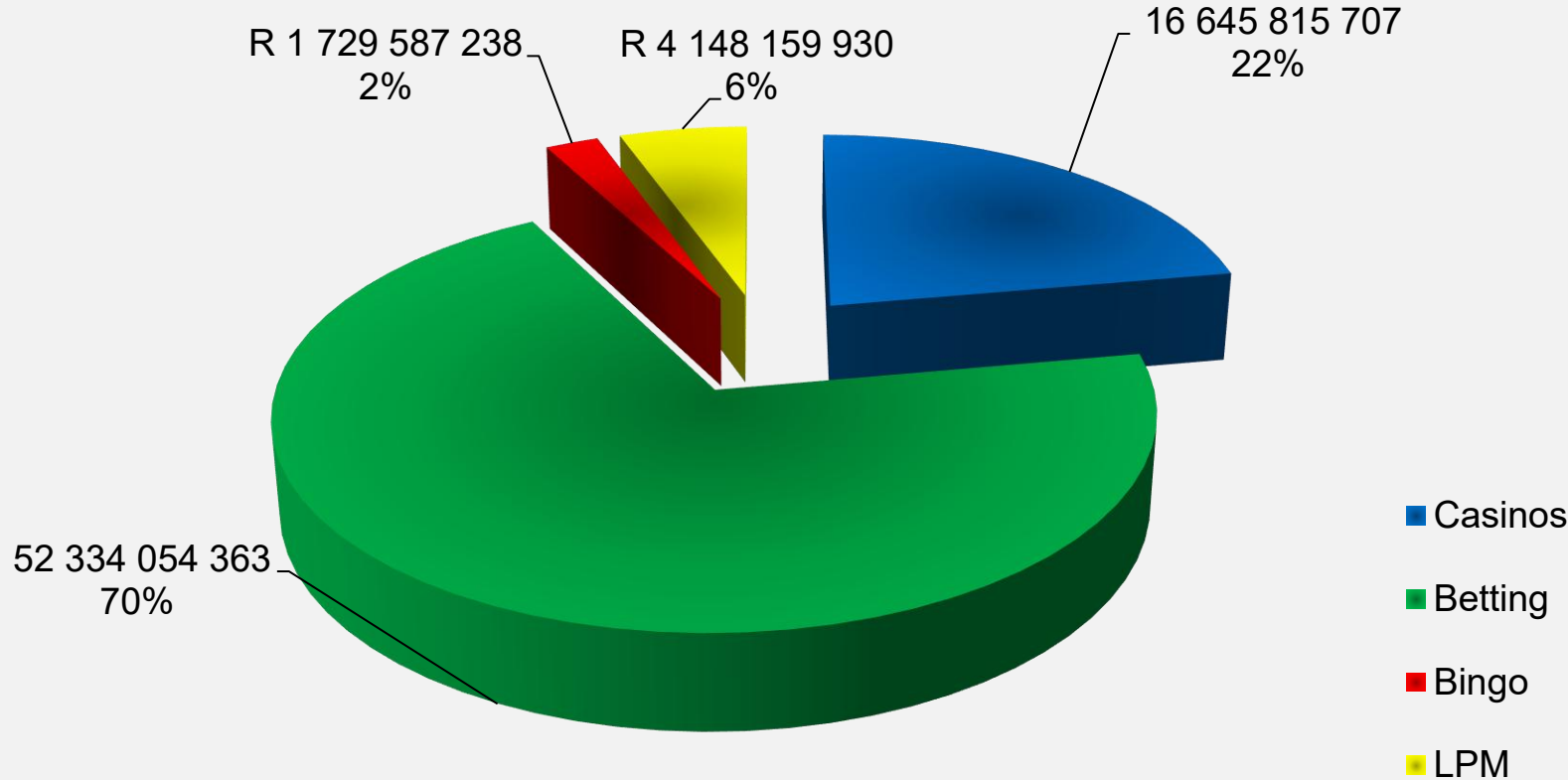
**Total people reached
through Education and
Awareness interventions
in FY2024/25**



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GAMBLING INDUSTRY TRENDS 2025/26 AND OUTLOOK

GGR per gambling mode, all provinces, FY2024/25



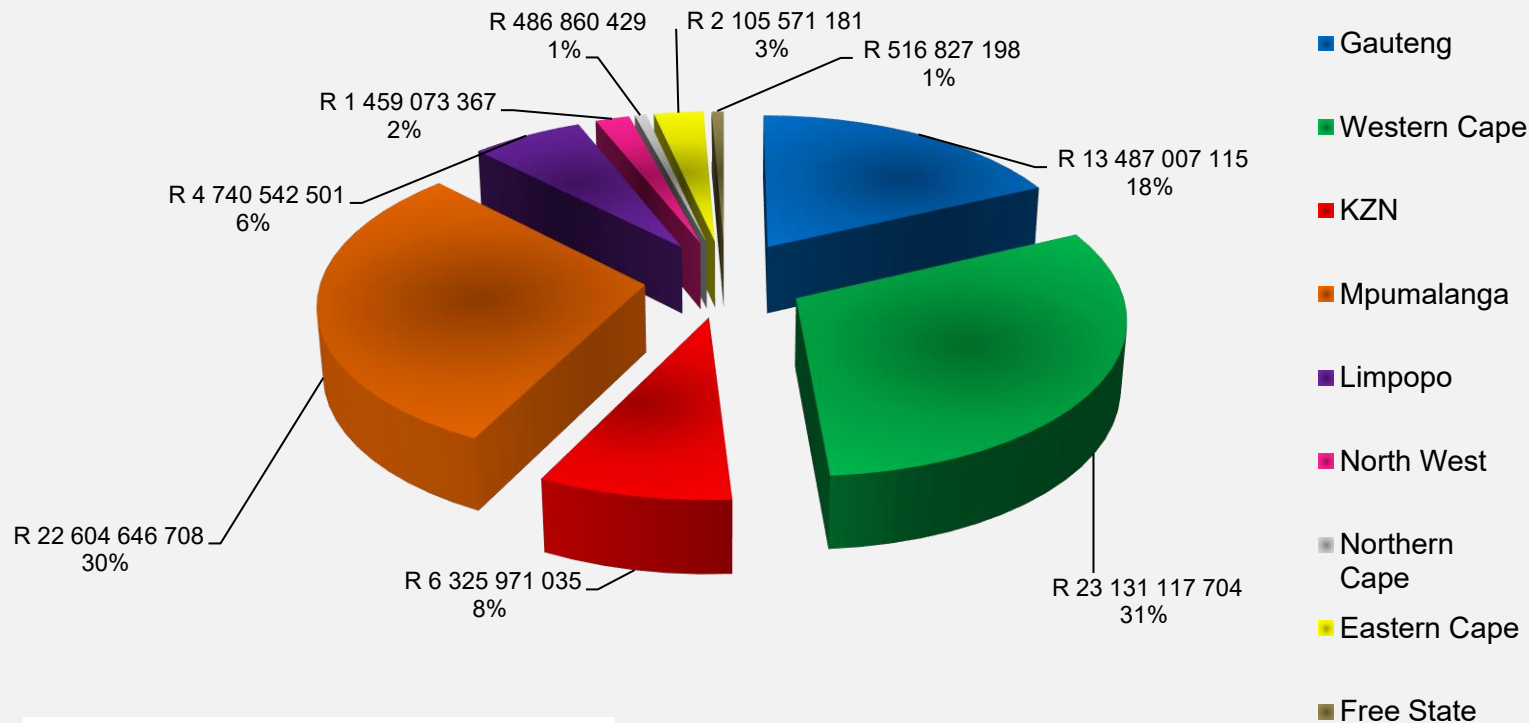
Total GGR: R74 857 617 238

A total amount of R74.5 billion was generated during FY2024/25.

Betting accounted for more than two thirds of total GGR at 70% (up from a market share of 60% during FY2023/24).

GAMBLING INDUSTRY TRENDS 2025/26 AND OUTLOOK

GGR per province, all modes, FY2024/25



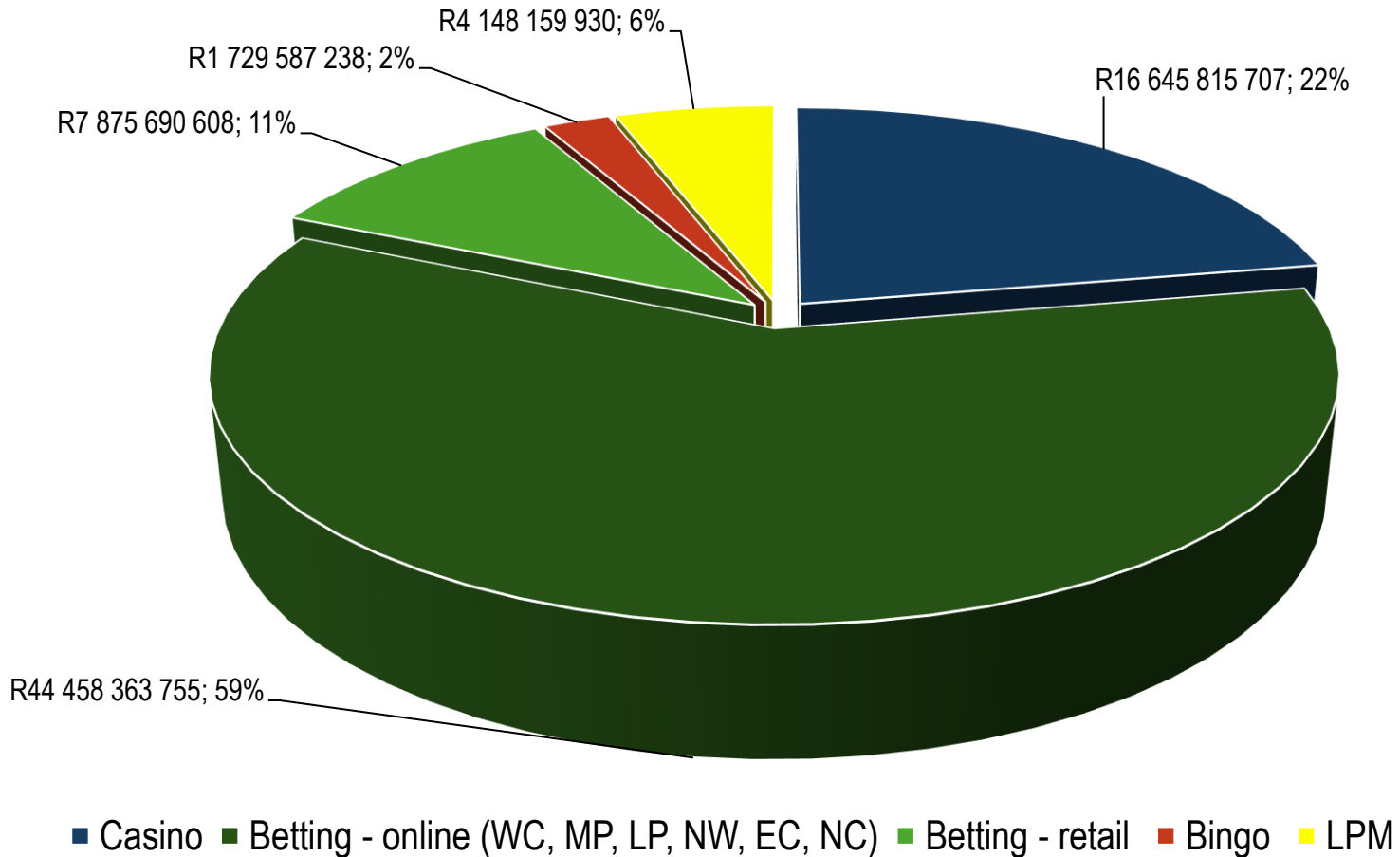
Total GGR: R74 857 617 238

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.

GAMBLING INDUSTRY TRENDS 2025/26 AND OUTLOOK

GGR per gambling mode, all provinces, FY2024/25



This is an estimation of online betting in relation to the other modes.

Disaggregated data between online and retail betting was obtained from 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 figure

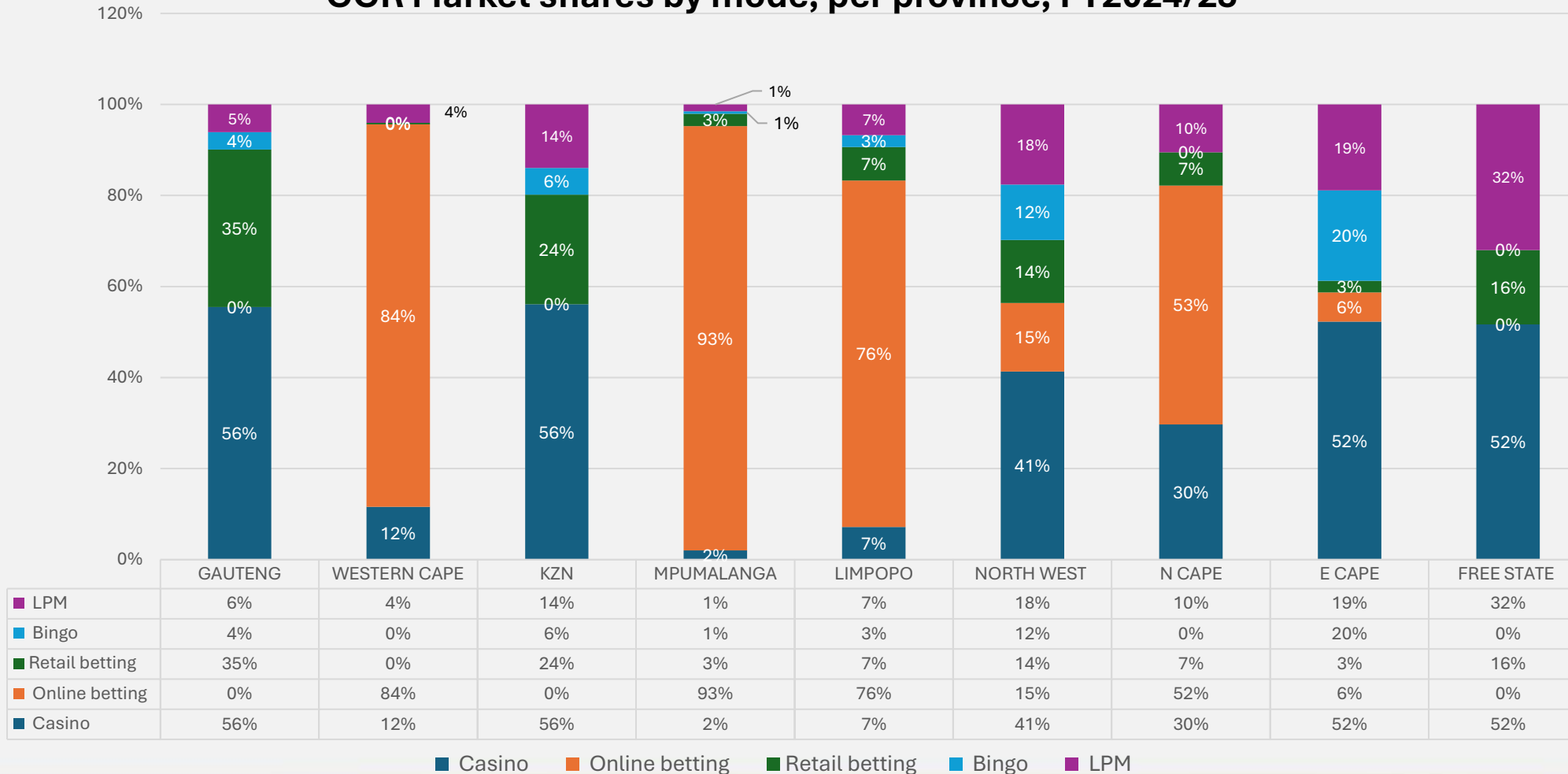
Based on this estimate and noting the data limitations, 60% of all gambling in South Africa took place online during FY2024/25.



GAMBLING INDUSTRY TRENDS 2025/26 AND OUTLOOK

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GGR Market shares by mode, per province, FY2024/25



In the provinces of Western Cape, Mpumalanga, Limpopo, and Northern Cape betting accounted for the highest amount of GGR generated.

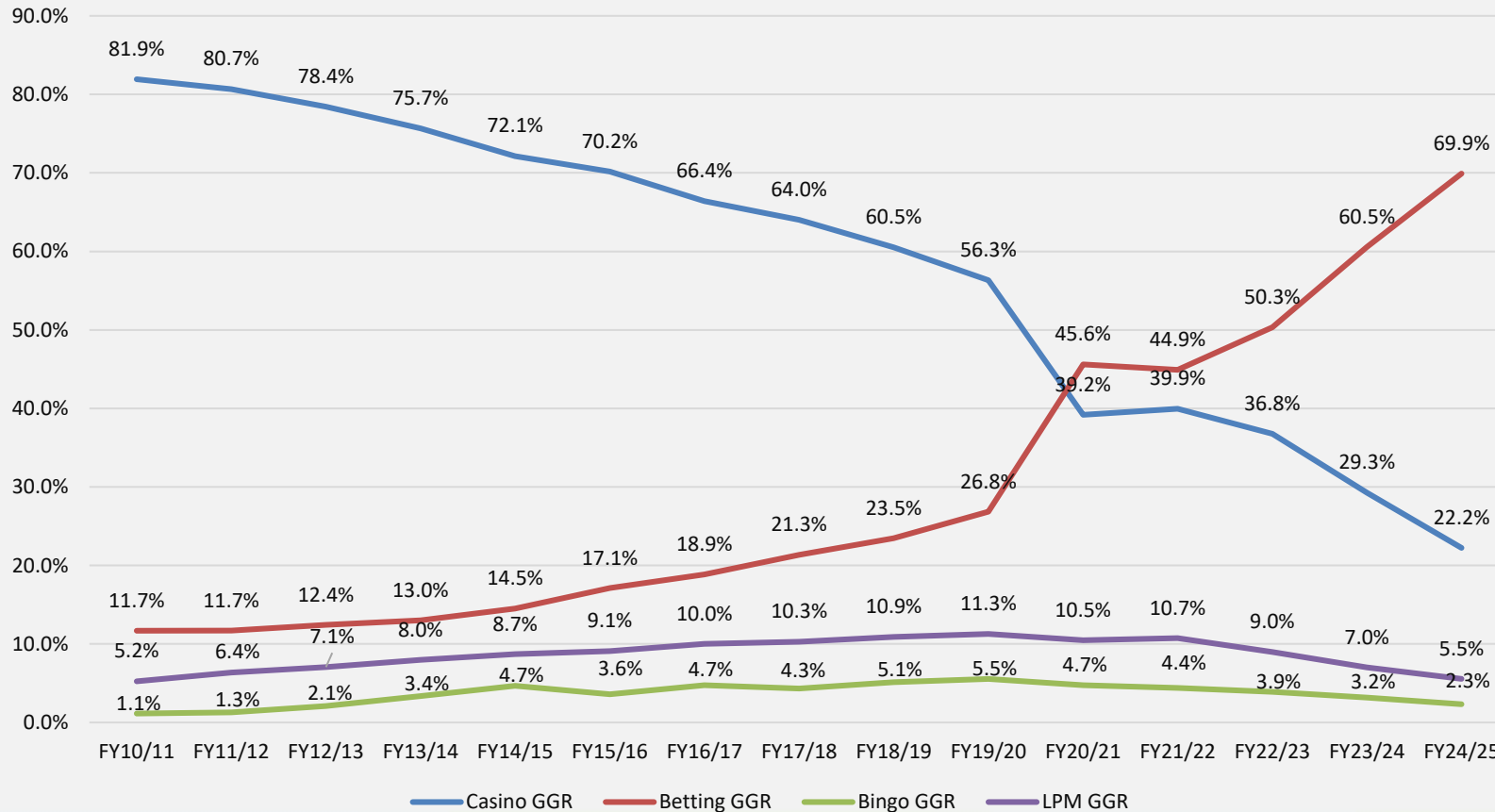
In the rest of the provinces Casinos still dominate in terms of market share.



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GAMBLING INDUSTRY TRENDS 2025/26 AND OUTLOOK

**Trend in share of total GGR, comparison all modes
(FY2010/11 – FY2024/25)**



GGR from all modes of gambling totalled R74.9 billion (all quarters). Betting accounted for the largest share of GGR at 69.9%. Casinos made up 22.2%, while LPMs and bingo took up 5.5% and 2.3% of the gambling market respectively.

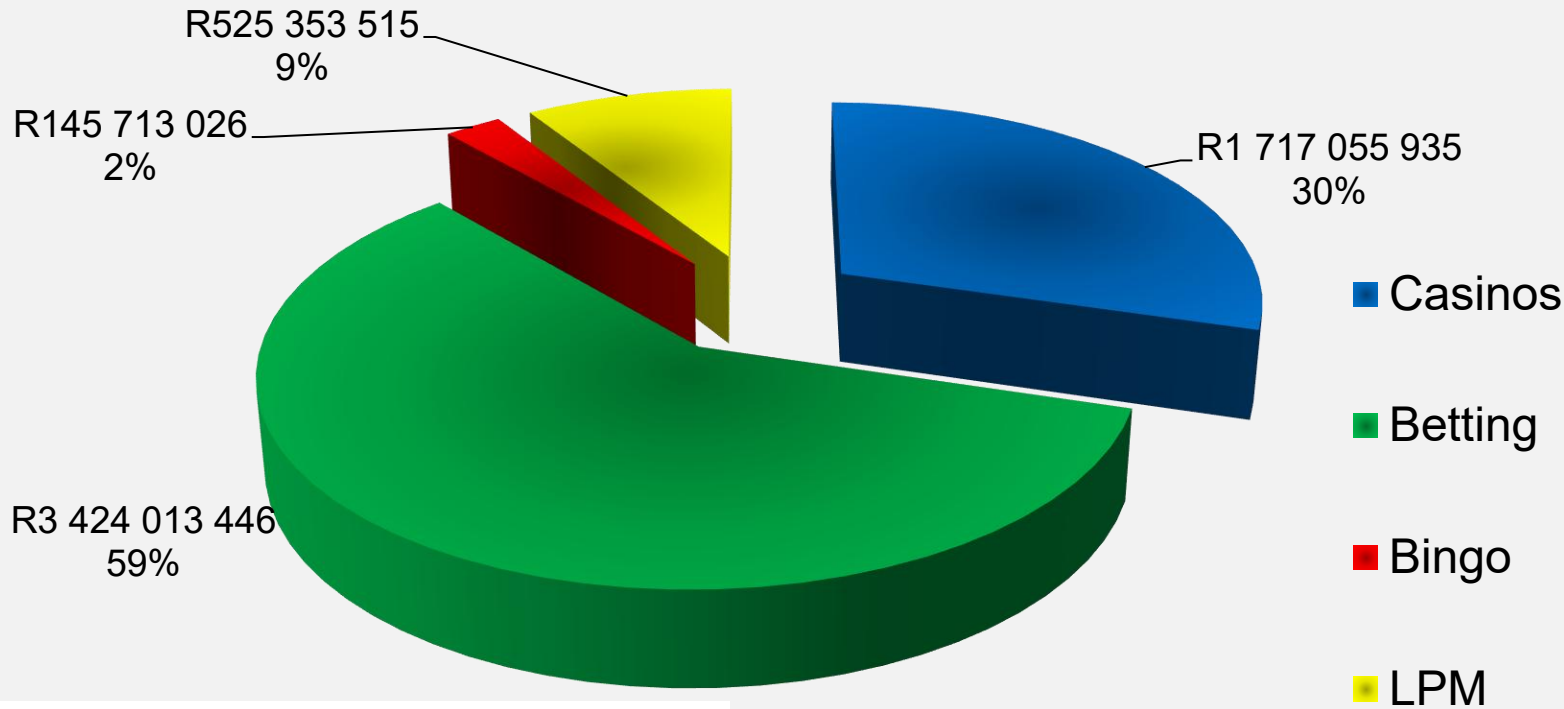
Over time, LPMs and bingo have maintained small market shares that have remained relatively stable – although both declined in FY2024/25. A striking swap occurred between betting and casinos in FY2020/21, when betting became the dominant gambling mode in South Africa and these two sectors have traded places, with the picture becoming the inverse of a decade ago.



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GAMBLING INDUSTRY TRENDS 2025/26 AND OUTLOOK

Taxes/levies per gambling mode, all provinces, FY2024/25



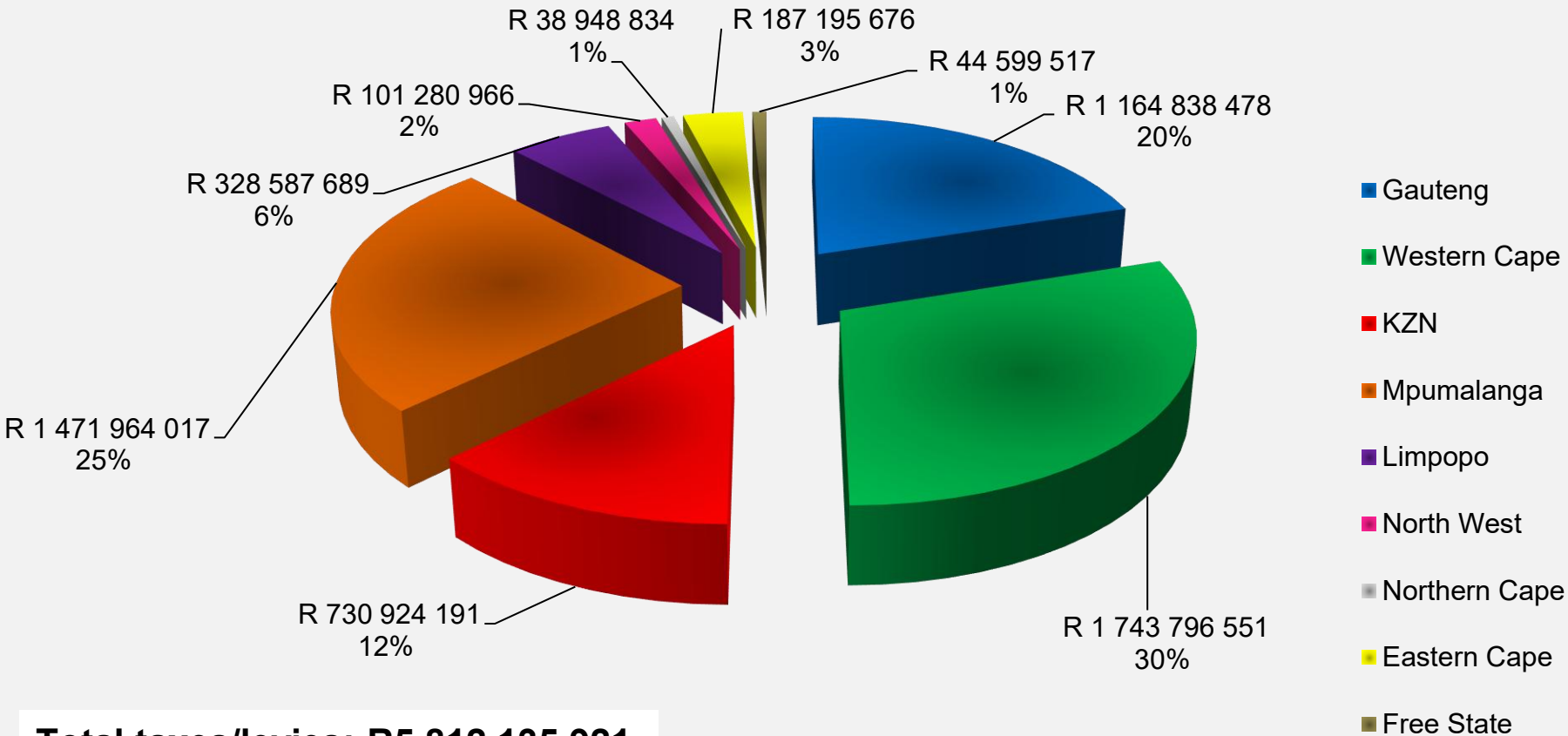
A total amount of R5.8 billion was collected during FY2024/25, which is 20.1% higher than the taxes/levies in the previous financial year.

At 59%, betting contributed the highest amount of taxes/levies relative to other gambling modes.

Total taxes/levies: R5 812 135 921

GAMBLING INDUSTRY TRENDS 2025/26 AND OUTLOOK

Taxes per province, all modes, FY2024/25

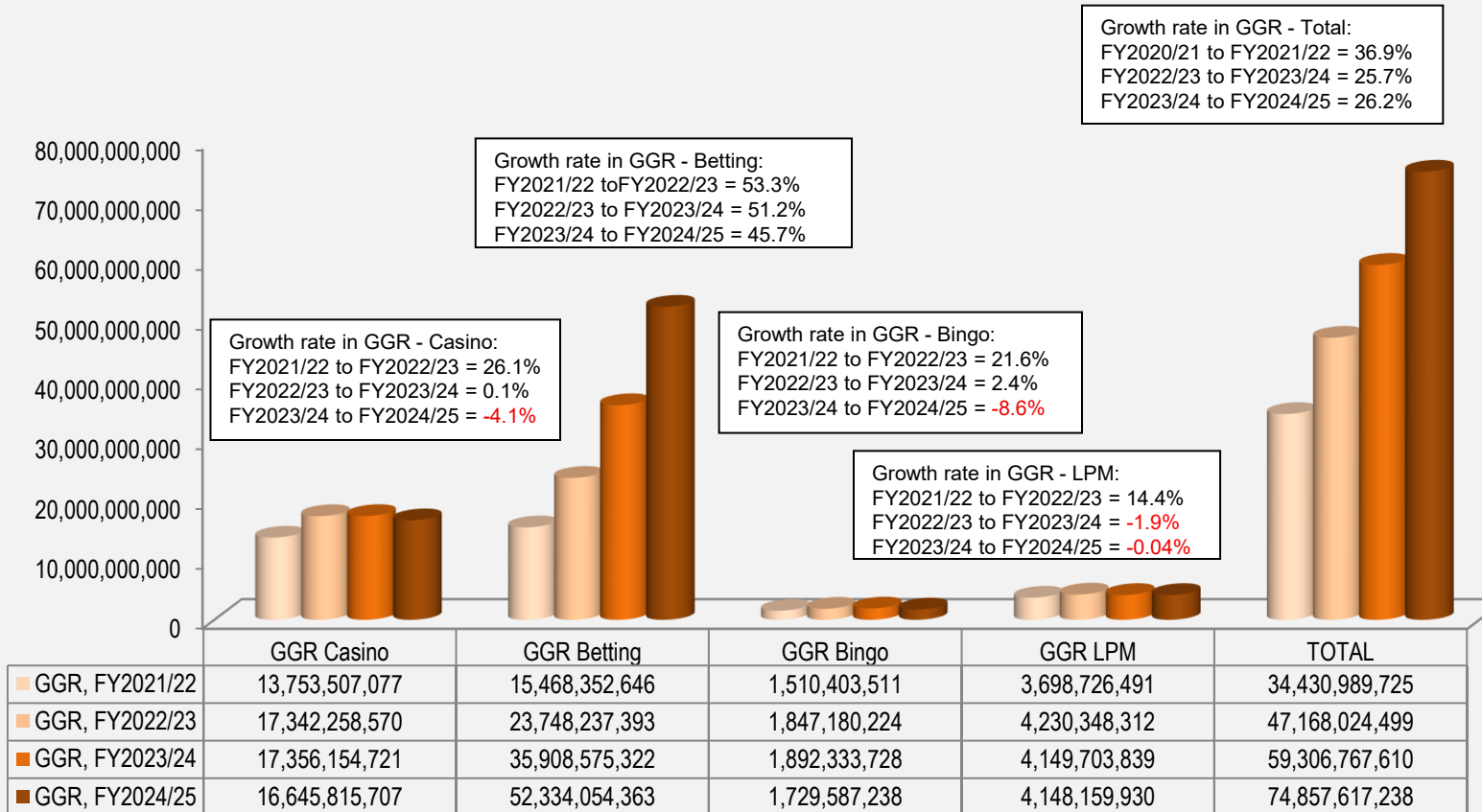


The Western Cape (30%) accounts for the largest share of taxes/levies generated across provinces

Total taxes/levies: R5 812 135 921

GAMBLING INDUSTRY TRENDS 2025/26 AND OUTLOOK

Growth in GGR (all modes): FY2021/22 - FY2024/25



Overall, GGR expanded by 26.2% during FY2024/25 relative to the previous year. This growth was driven solely by the betting sector which increased by 45.7%, while the other modes of gambling declined.

Betting growth however is slowing, compared to FY2022/23 growth of 53.3%. Over the past year, operational retail bookmaker outlets declined from 594 to 553 outlets (7% decline), which may explain the slowdown in growth. This is in line with other land-based models of gambling declining.

Casino GGR fell by 4.1%, coinciding with a decline in operational slots and tables. LPMs declining by 0.04% and bingo GGR shrank by 8.6%.

Betting growth overall remains high due to its availability online



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EMERGING REGULATORY CHALLENGES

- Proliferation of Illegal and Unlicensed Online Gambling- Online access through mobile phones and computers has led to an increase in illegal online gambling. This technological shift poses challenges for regulation and enforcement as offshore operators offer unregulated online casino games. Illegal gambling diverts revenue from the state, fosters addiction, and undermines the integrity of the regulated industry.
- Increased illegal gambling requires increased enforcement – currently the NGB works in collaboration with the provincial licensing authorities, SAPS, FIC, banks and other network providers to assist with the detection and prosecution of illegal gambling in the country which is dominated by illegal online gambling. However, enforcement gaps between PLAs and national oversight require strengthening.
- Proliferation and Weak Control of Gambling Advertising- The increase in gambling advertising, without sufficient guidelines, has normalized gambling in society (including amongst minors) fostering harmful gambling habits. Sponsorships and influencer marketing blur the lines between entertainment and gambling promotion. Norms and Standards on advertising to protect minors and vulnerable groups as well as regulations governing gambling advertising are required to ensure that punters are protected from the negative social consequences of gambling.
- Misalignment between national and provincial gambling legislation results in inconsistencies in the way gambling is regulated at a National and Provincial level.



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RECENT DEVELOPMENTS

- **The National Gambling Policy Council (NGPC) met in July and October 2025.**
 - Key discussions included:
 - Gambling trends and socioeconomic impacts
 - LPM stakes and prize limits study results
 - Gazetting of national self-exclusion register
 - Status of the *National Gambling Amendment Bill (2018)*
 - Online gambling legislation and new gambling forms
- Stakeholder Collaboration- The NGB has re-integrated into the Chairpersons and CEOs Forum and its subcommittees, strengthening intergovernmental collaboration.
- SCA Gauteng Ruling (2025): Confirms it is unlawful for bookmakers to offer roulette/casino games online. This reinforces the separation of gambling modes (casinos, betting, bingo, LPMs) and upholds industry integrity and fairness. Although this ruling stirs up the challenges with concurrent nature of regulation of gambling in SA, the NGB is engaging PLAs and issues will be referred to the relevant structure for resolution on differing views.

- Responsible gambling is a shared responsibility.
- A multi-stakeholder approach is required to ensure people are protected from the harms and risks of gambling. Collaboration between regulators, operators, civil society, law enforcement, treatment professionals, and media partners is crucial to balance the economic benefits of gambling with social safeguards.
- National education campaigns and treatment and counselling partnerships are important to reach more South Africans with messages on responsible gambling and the socio-economic impact of gambling.
- As the industry evolves, it is vital to:
 - ❖ Promote ethical conduct and compliance in gambling operations
 - ❖ Enhance research and education on gambling risks;
 - ❖ Support treatment and rehabilitation services; and
 - ❖ Ensure that gambling remains an activity of entertainment, not exploitation

CONCLUSION

- The South African gambling industry remains a resilient and growing sector.
- Strengthened collaboration between regulators and operators will sustain growth and ensure a balance is achieved between the economic gains of gambling and the socio-negative consequences of gambling.
- The NGB will continue to promote a fair, responsible, and competitive gambling market.