



National Gambling Board  
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# National Gambling Statistics FY2023/24





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# National Gambling Statistics

**Casinos, Bingo, Limited Pay-out Machines and Betting on Horse Racing and Sport  
offered by Bookmakers and Totalisators  
Audited Statistics**

FY2023/24

**1 April 2023 – 31 March 2024**

# Introduction

- ❑ The National Gambling Board (NGB) is mandated by the National Gambling Act (NGA), 2004 (Act 7 of 2004), Section 65(2)(e) to monitor market conduct and market share.
  
- ❑ NGB monitors market conduct (number of gambling positions and outlets in the South African gambling sector) and also gathers and analyses national gambling statistics in terms of turnover (TO), Gross Gambling Revenue (GGR) and the collection of taxes/levies.
  
- ❑ The scope of this presentation covers audited information (national gambling statistics) related to the following legalised gambling modes in South Africa (as regulated by the NGB) of the Financial Year (FY) 2023/24:
  - Casinos (tables and slots);
  - Betting on horse racing, sport and other contingencies (offered by bookmakers and totalisators, on and off course);
  - Limited Payout Machines (LPMs); and
  - Bingo (traditional and Electronic Bingo Terminals (EBTs)).

# Introduction

- ❑ Quarterly statistics were sourced from Provincial Licensing Authorities (PLAs).
- ❑ FY2023/24 information in this report is based on audited data.
- ❑ The information in this report is applicable to the period of 1 April 2023 to 31 March 2024 (FY2023/24), whereas quarters are representative of the following specific periods:
  - Quarter 1: 1 April 2023 – 30 June 2023
  - Quarter 2: 1 July 2023 – 30 September 2023
  - Quarter 3: 1 October 2023 – 31 December 2023
  - Quarter 4: 1 January 2024 – 31 March 2024
- ❑ The purpose of this presentation is to provide an overview regarding the status and performance of the South African gambling sector in terms of casinos, bingo, LPMs and betting on horse racing and sport with specific reference to statistics relative to turnover, GGR, generated, taxes/levies collected and Return To Player (RTP).

# Definitions

- ❑ **TO** = Turnover (the rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion)
- ❑ **GGR** = Gross Gambling Revenue (the rand value of the gross revenue of an operator i.e. turnover less winnings paid to players)
- ❑ **Tax** = Gambling tax (gambling tax levied and collected by Provincial Licensing Authorities)
- ❑ **RTP** = Return To Player is an average achieved over a significant number of game plays and not each time the gaming machine is played (Total amount returned to players / Total amount wagered by players x 100)

# Source of data

Statistics are based on provincial statistics and raw data received from all the Provincial Licensing Authorities quarterly:

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

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# EXECUTIVE SUMMARY

At the end of FY2023/24, R1.1 trillion was wagered in the South African gambling industry, which is 40.2% higher than the turnover generated during the previous financial year. Gross gambling revenue (GGR) amounted to R59.3 billion, a 25.7% increase from the previous year.

Analysis of GGR by gambling mode revealed betting to have generated 60.5% of industry GGR at R35.9 billion. Casinos also generated a sizable proportion of GGR at R17.4 billion (29.3%). The LPM industry is the third largest sector (7.0%), generating R4.1 billion during FY2023/24. The bingo industry generated 3.2% of revenues at R1.9 billion.

GGR growth between the modes of gambling showed unbalanced growth between the modes of gambling with betting driving growth. Betting increased by 51.2% relative to the previous year. The casino industry saw miniscule growth (0.1%), while LPM GGR declined by 1.9%. The bingo industry experienced low growth of 2.4%.

Taxes/levies amounted to R4.8 billion during FY2023/24, which is 19.2% higher than the value in the previous year. Betting generated the largest proportion of taxes/levies at 49.9%, followed by casinos (36.5%), LPMs (10.2%) and bingo (3.4%).





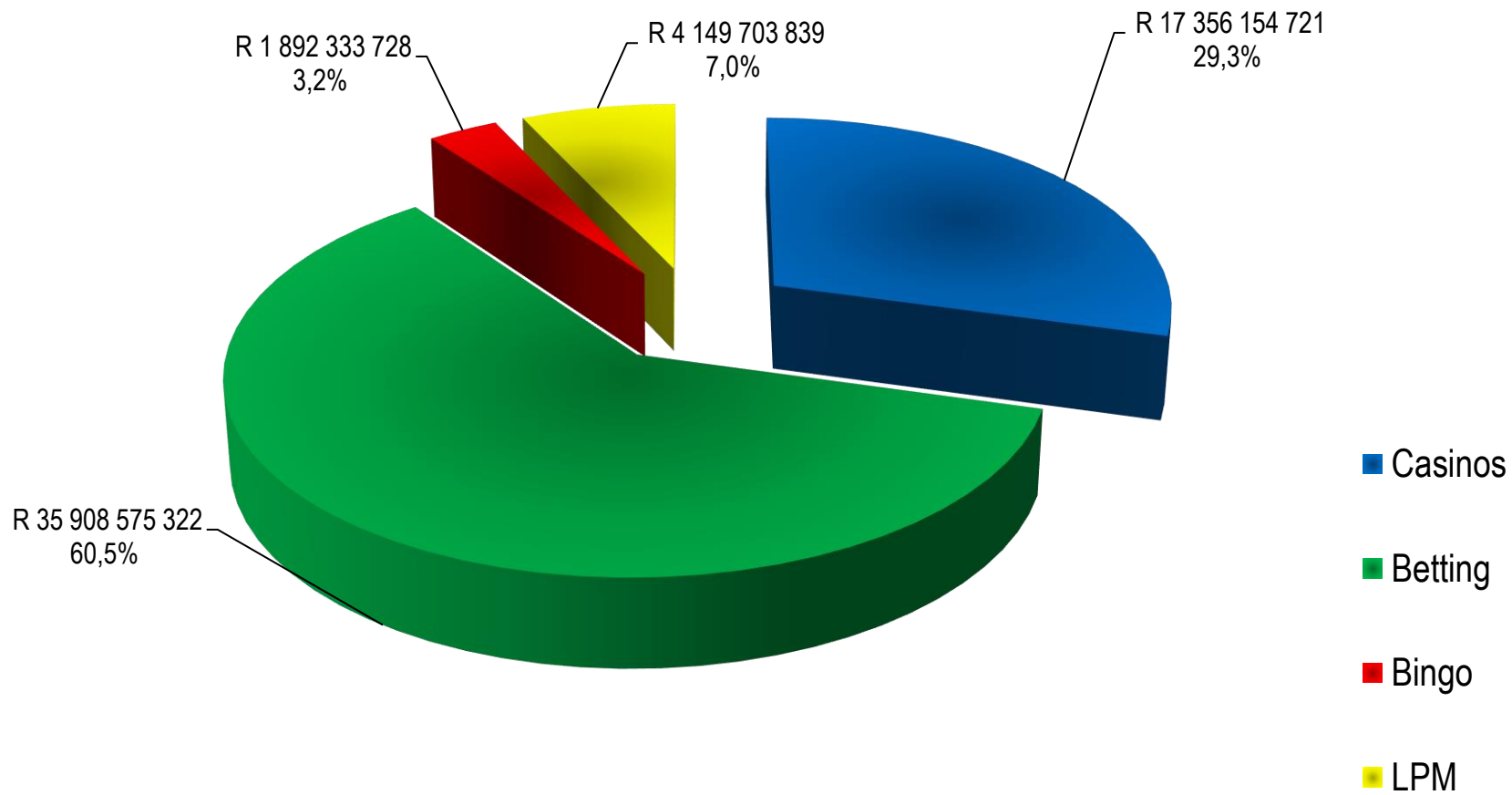
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# GROSS GAMBLING REVENUE

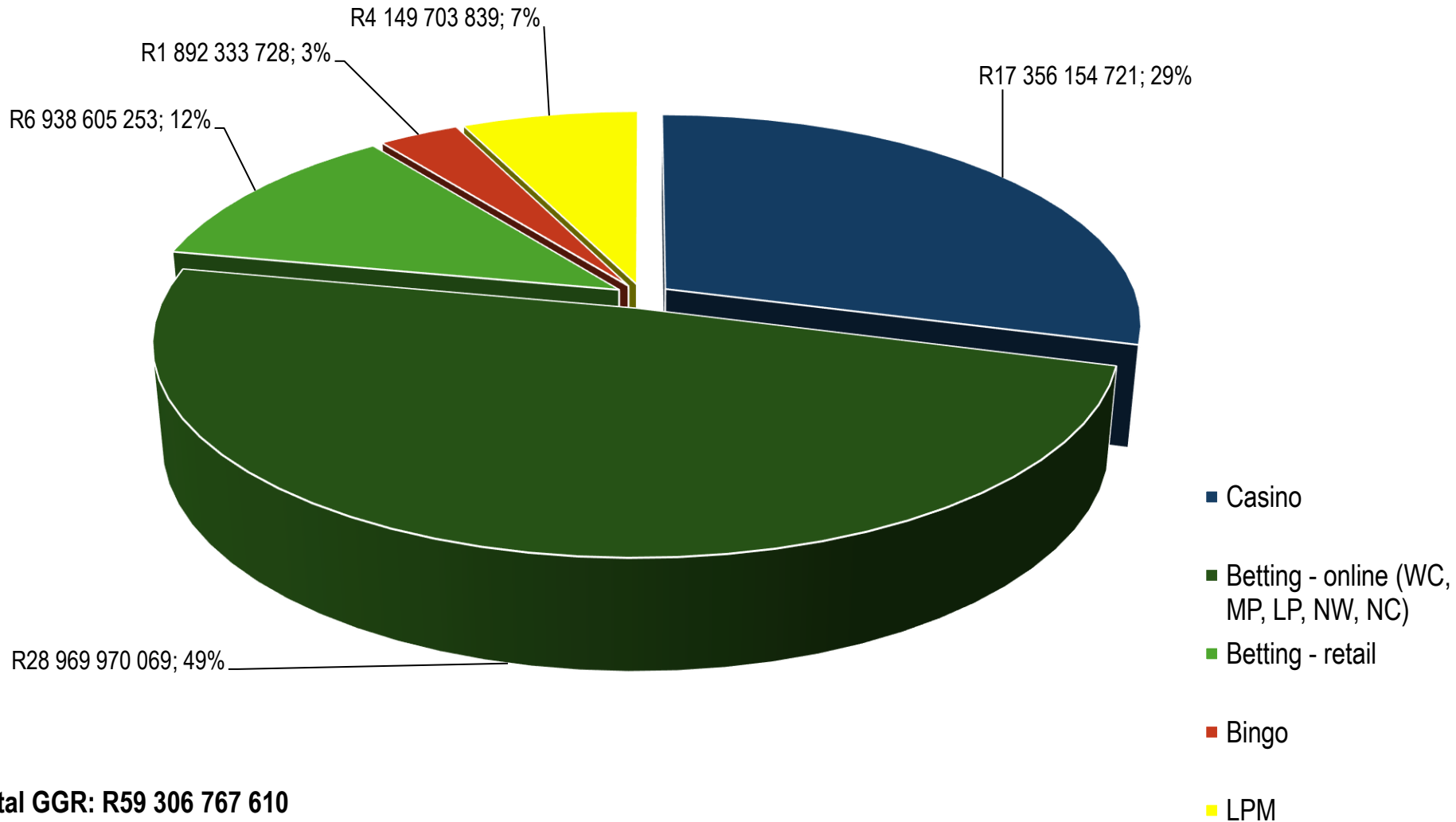


# GGR per gambling mode, all provinces, FY2023/24



Total GGR: R59 306 767 610

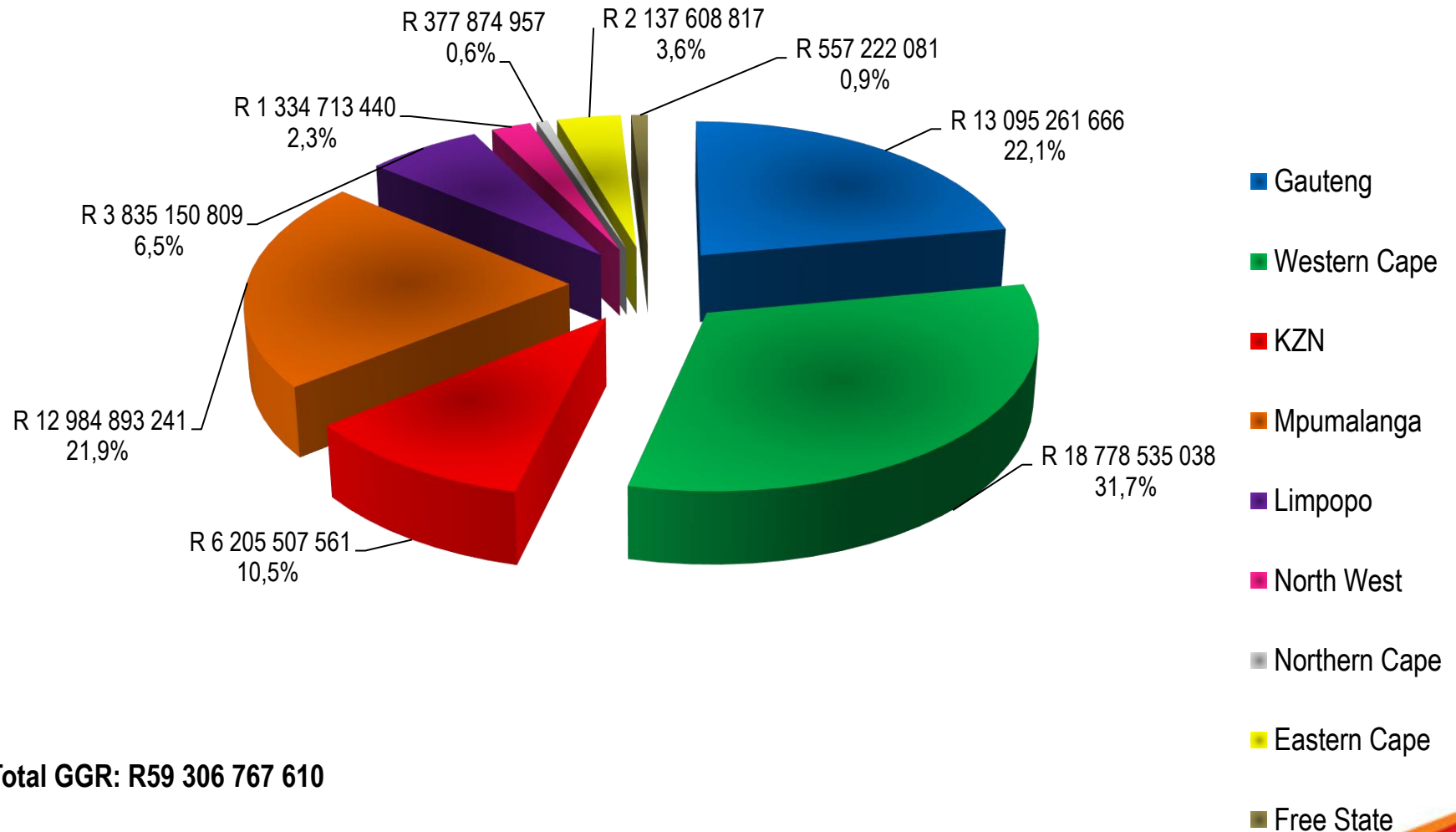
# GGR per gambling mode, all provinces, FY2023/24



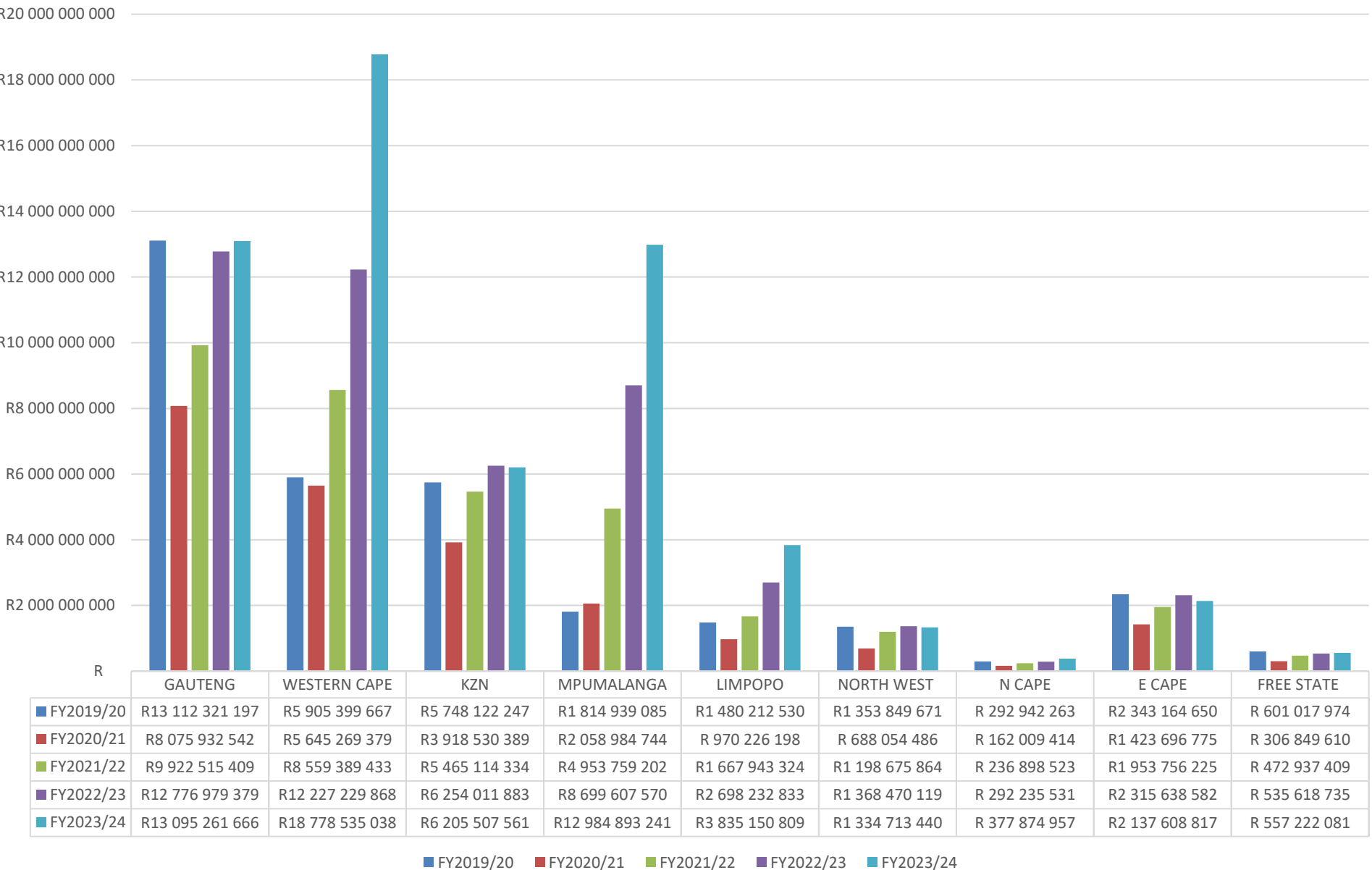
**Total GGR: R59 306 767 610**

*Note: Disaggregated betting data split between online and retail for WC, MP, LP, NW, NC. All other provinces betting data assumed retail.*

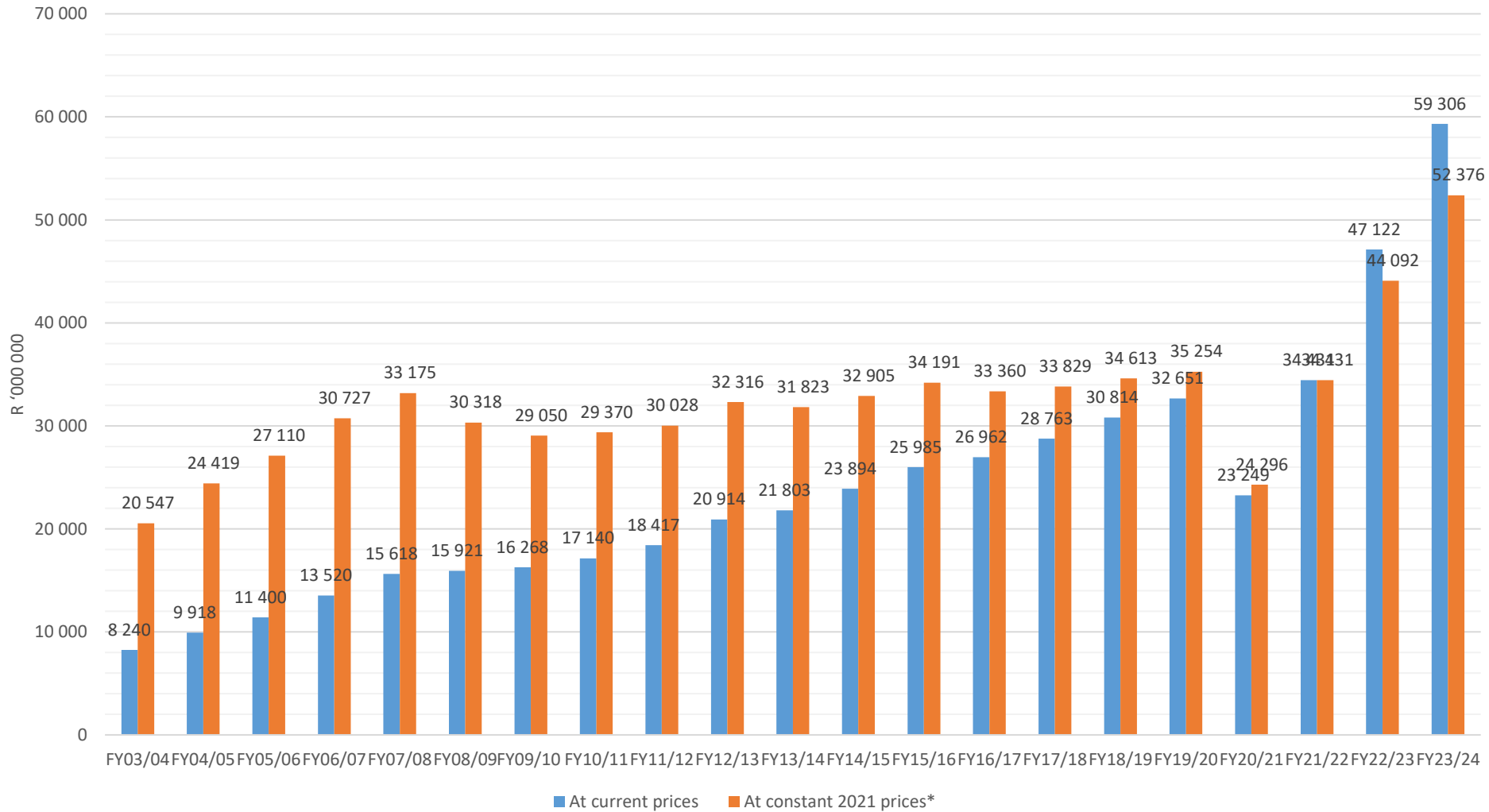
# GGR per province, all modes, FY2023/24



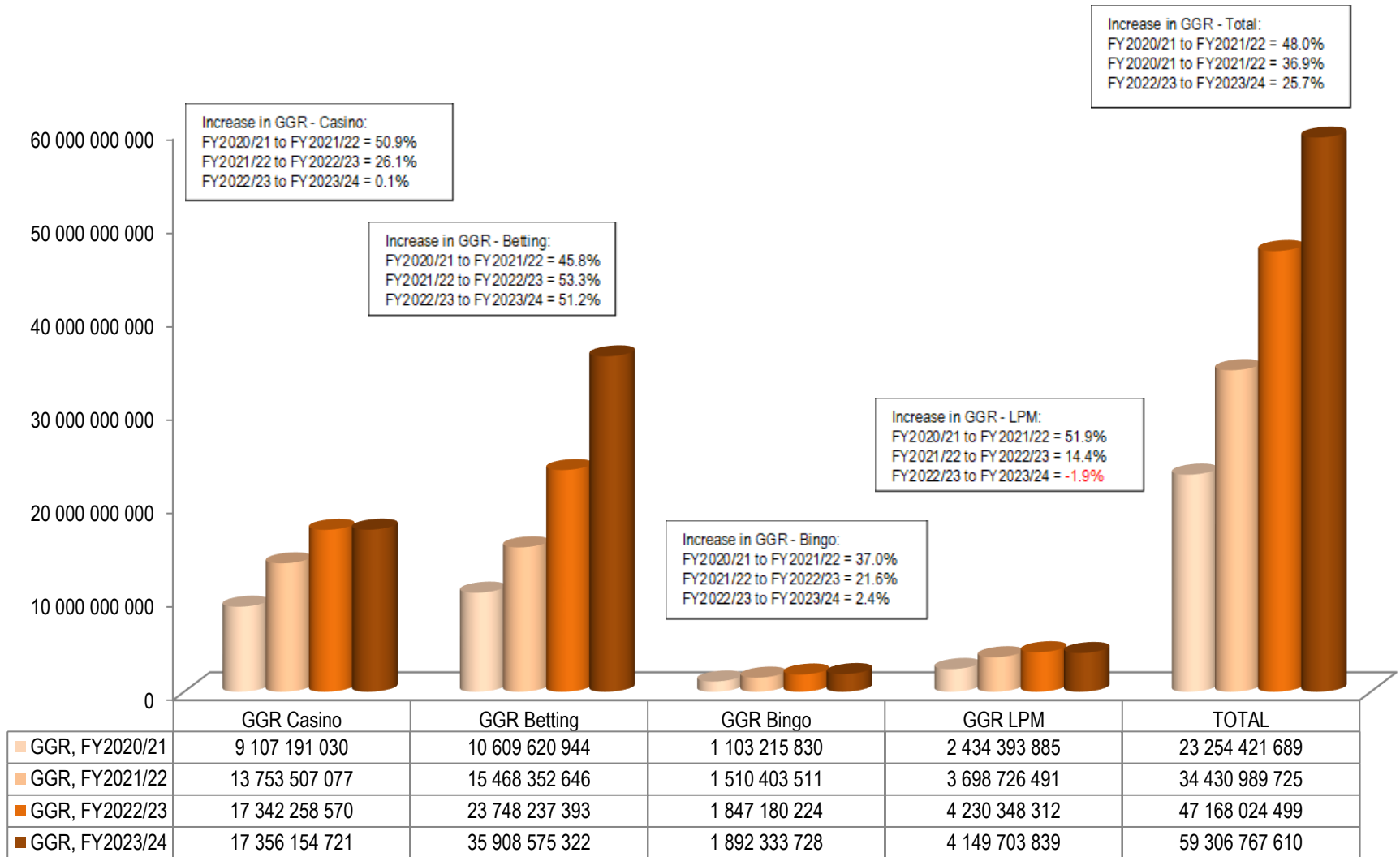
# Trend in GGR, per province FY2019/20 to F2023/24



# Trend in GGR, all modes, from FY2003/04 to FY2023/24

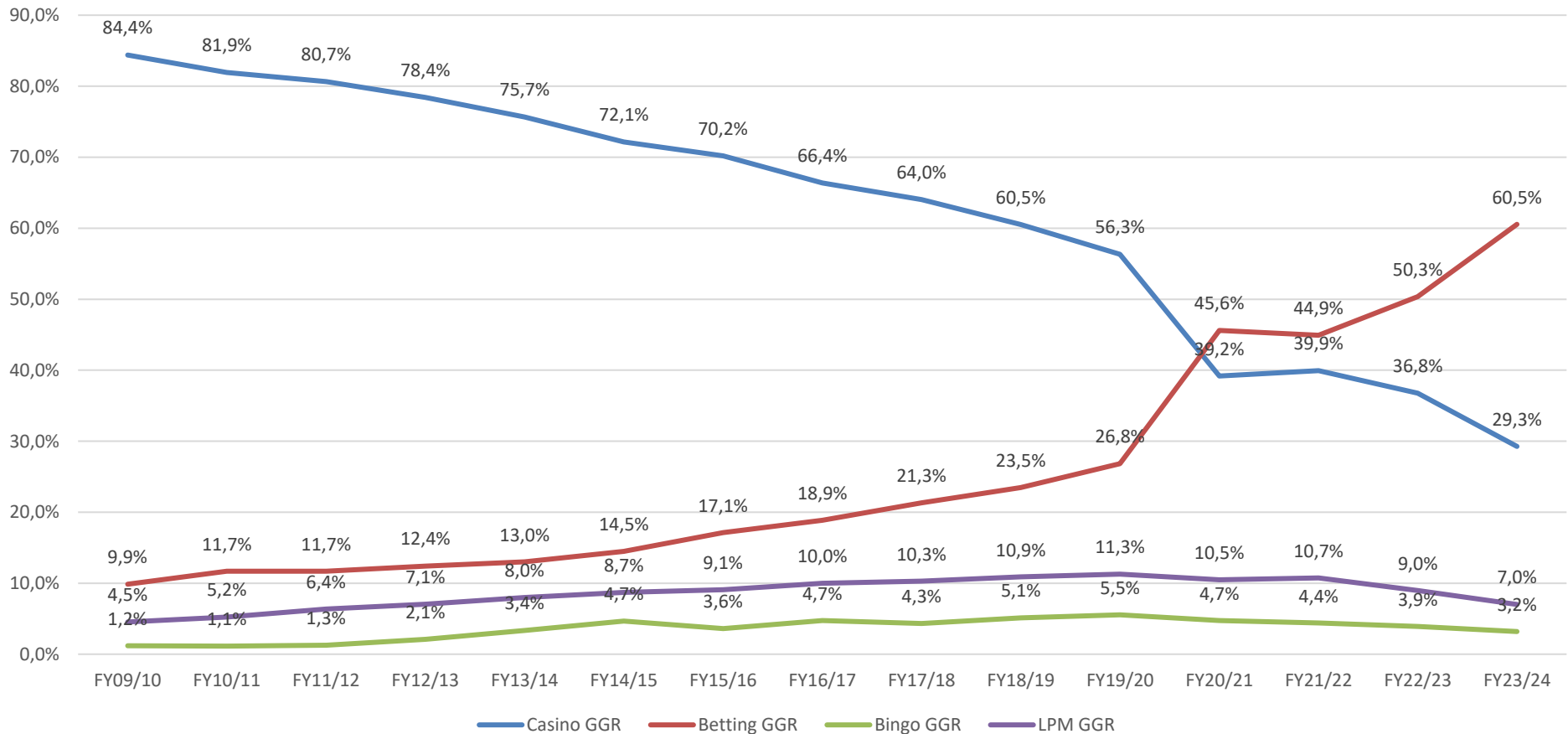


# Growth in GGR (all modes): FY2020/21 - FY2023/24



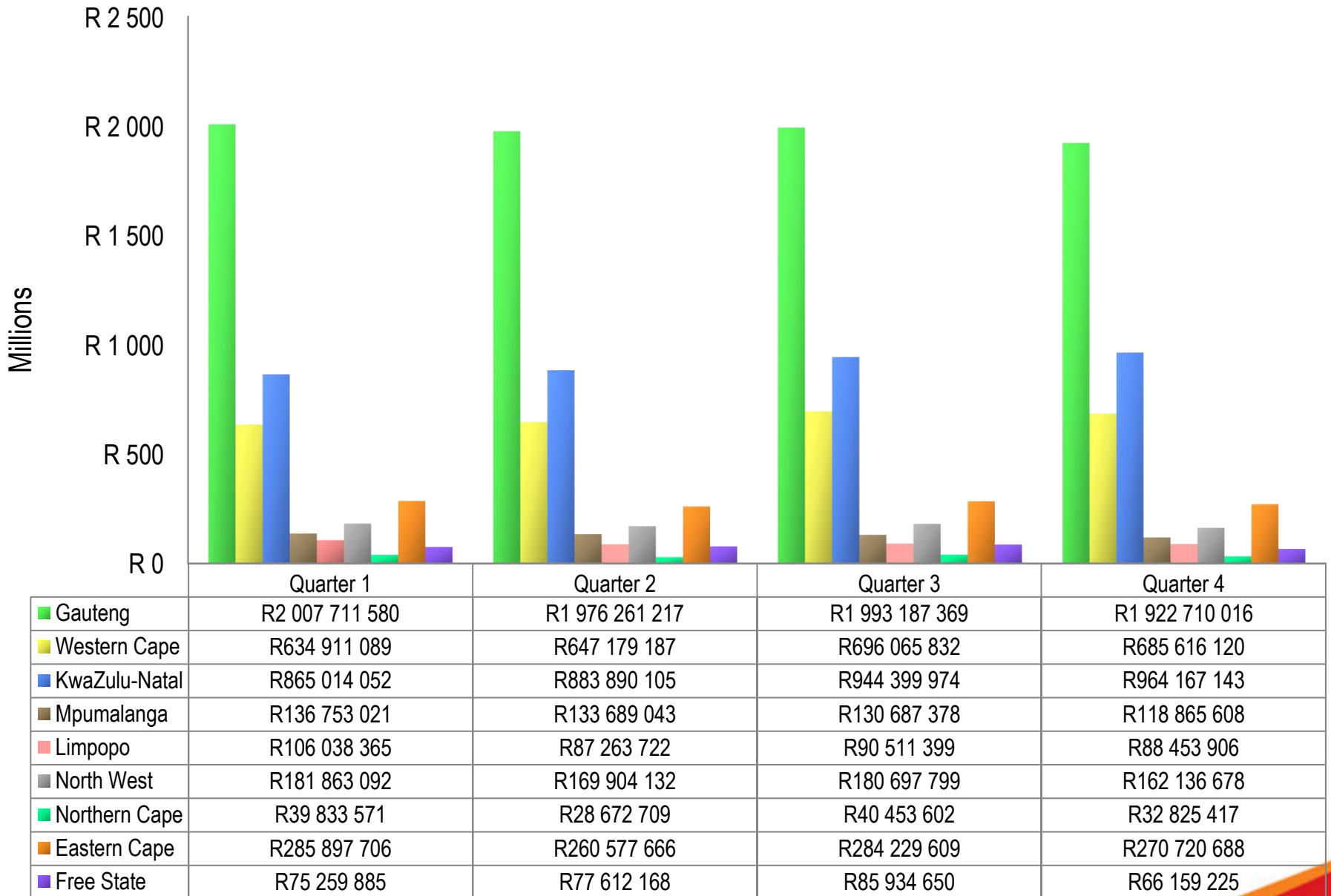
# Trend in share of total GGR, comparison all modes (FY2009/10 – FY2023/24)

Trend in share of total GGR, comparison all modes  
(FY2009/10 – FY2023/24)

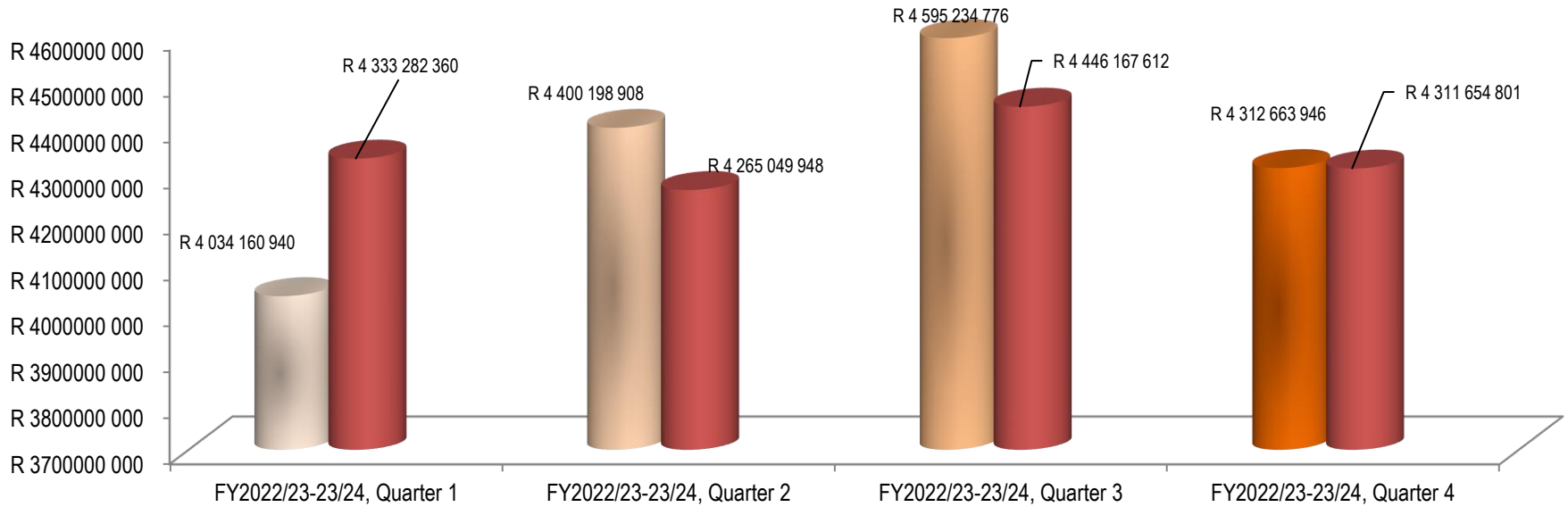




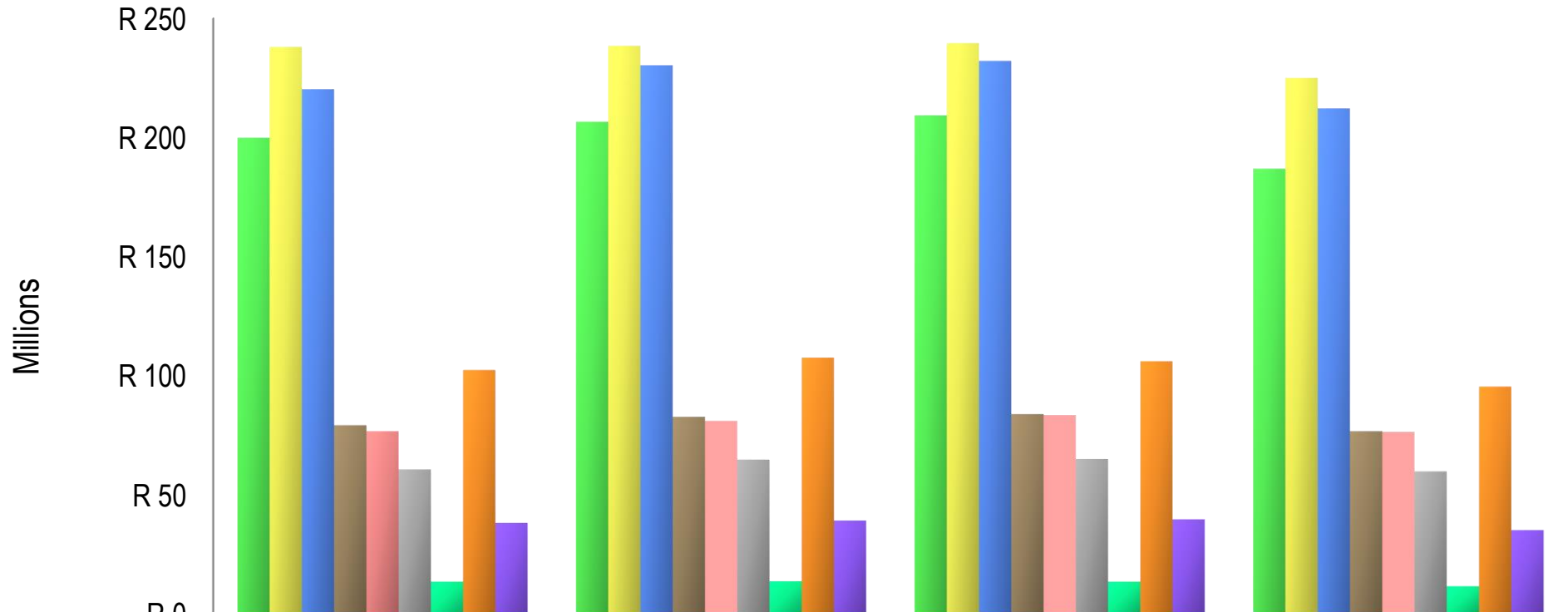
# Quarterly casino GGR - FY2023/24



# Trend GGR, casinos, FY2022/23-2023/24

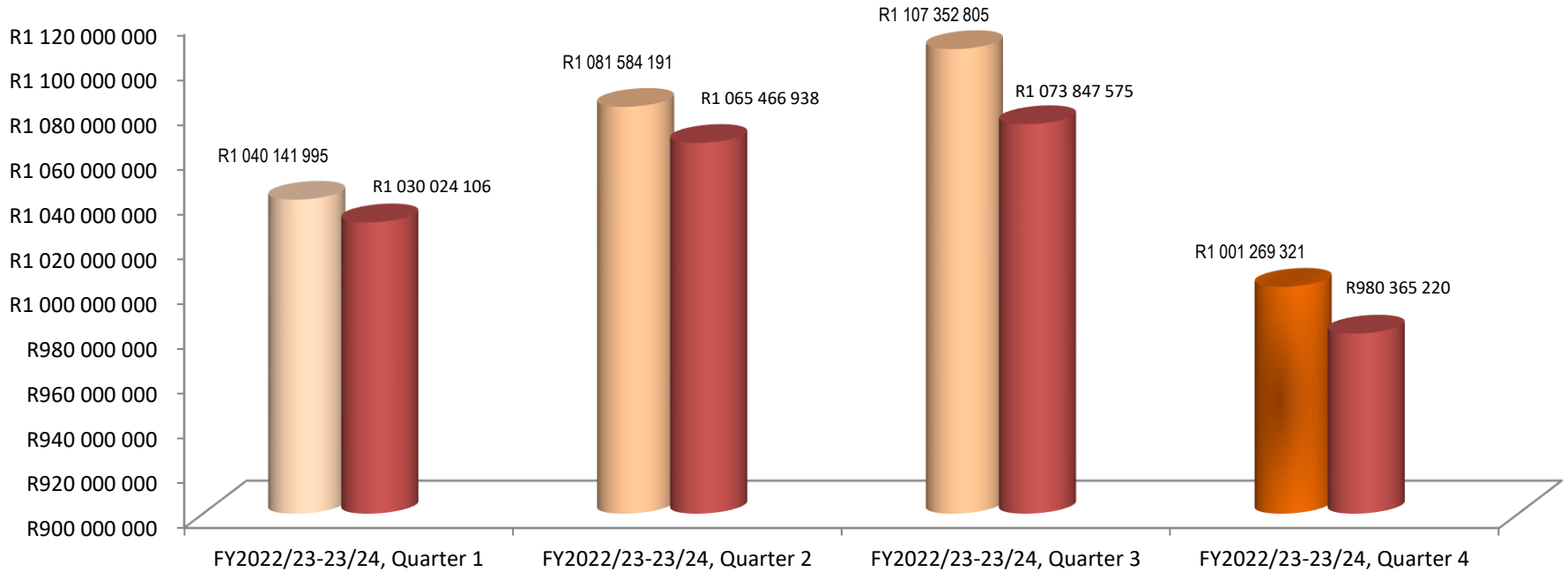


# Quarterly LPM GGR - FY2023/24

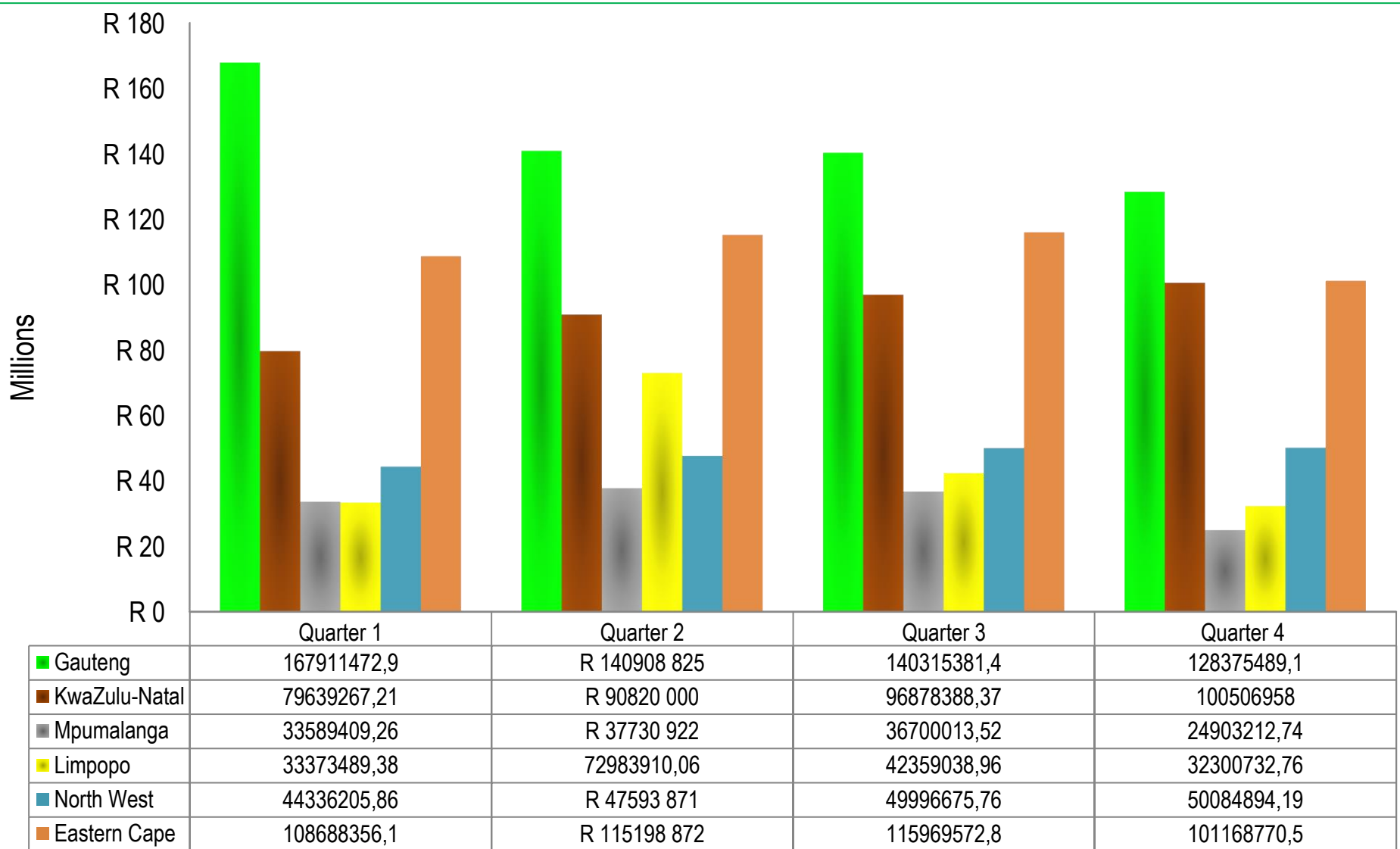


	Quarter 1	Quarter 2	Quarter 3	Quarter 4
■ Gauteng	R199 999 078	R206 715 947	R209 383 278	R187 047 574
■ Western Cape	R238 129 391	R238 571 705	R239 679 581	R225 074 529
■ KwaZulu-Natal	R220 340 922	R230 382 411	R232 259 421	R212 295 717
■ Mpumalanga	R79 379 914	R82 891 362	R84 025 353	R76 825 552
■ Limpopo	R76 839 716	R81 174 029	R83 643 858	R76 587 355
■ North West	R60 777 260	R64 872 922	R65 180 019	R59 941 664
■ Northern Cape	R13 638 669	R13 811 476	R13 627 667	R11 701 460
■ Eastern Cape	R102 565 678	R107 758 480	R106 246 442	R95 603 081
■ Free State	R38 353 479	R39 288 606	R39 801 956	R35 288 288

# Trend in GGR LPMs – FY2021/22 - FY2022/23

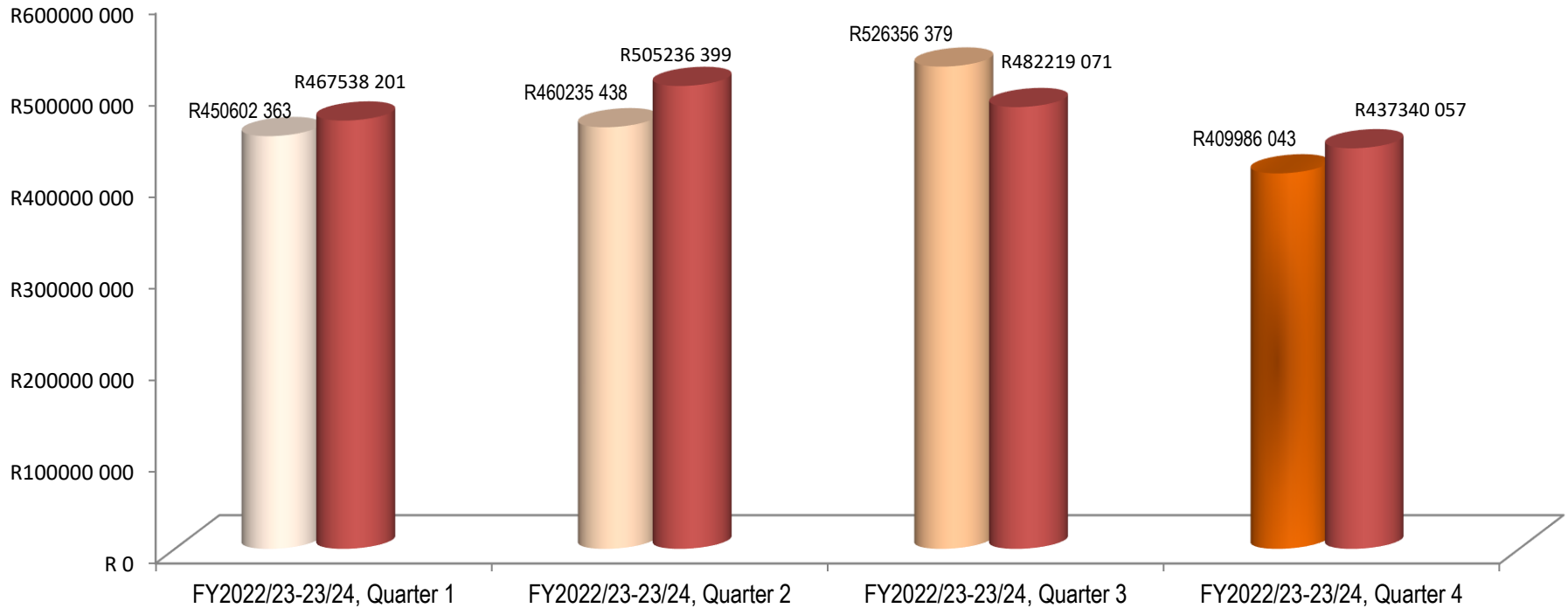


# Quarterly bingo GGR - FY2023/24\*



- Bingo offered for play in Gauteng, Mpumalanga, Limpopo, North West, KwaZulu-Natal and Eastern Cape only

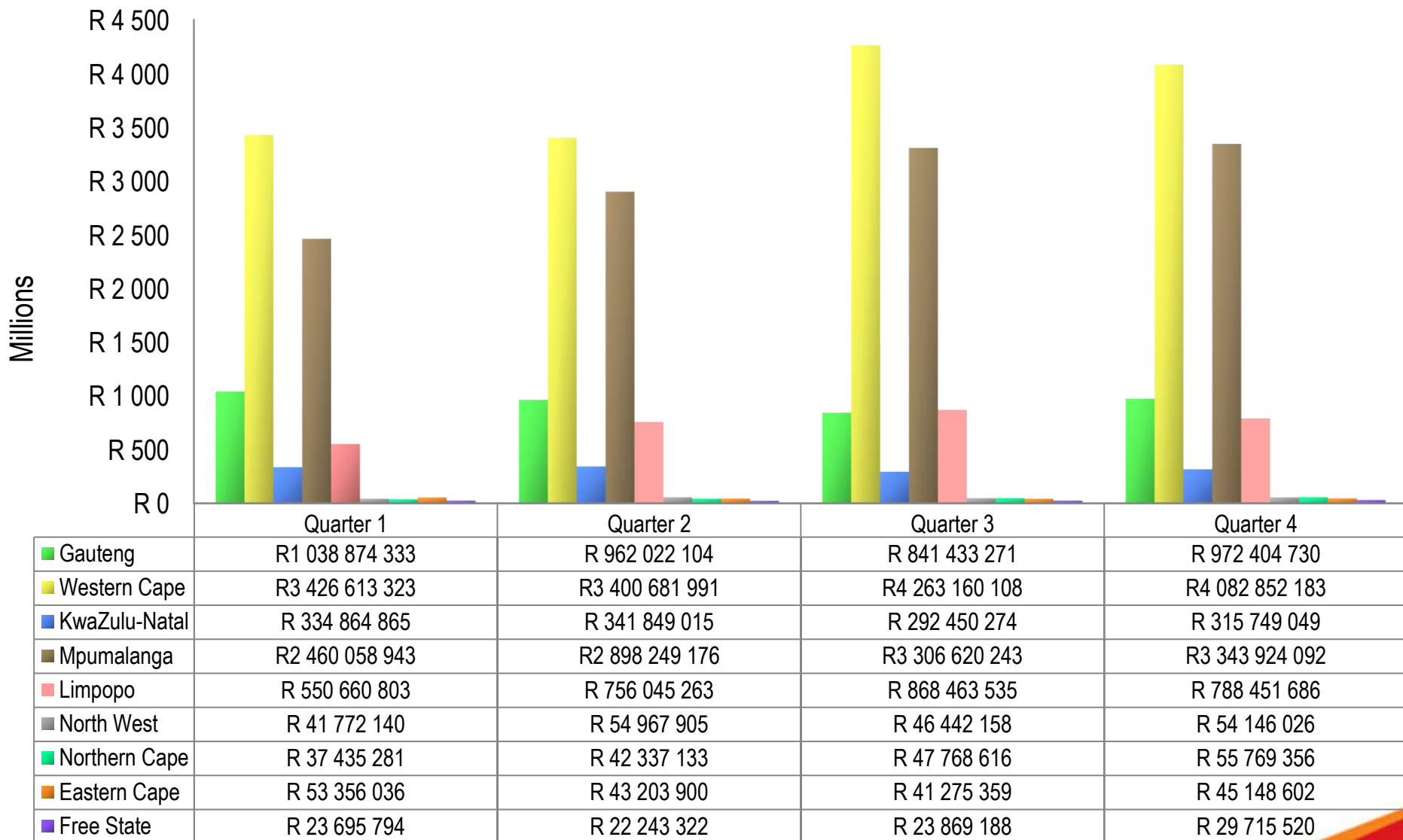
# Trend in GGR Bingo – FY2022/23 – FY2023/24



\* Bingo offered for play in Gauteng, Mpumalanga, Limpopo, North West, Eastern Cape and KwaZulu-Natal only

# Quarterly betting GGR – FY2023/24

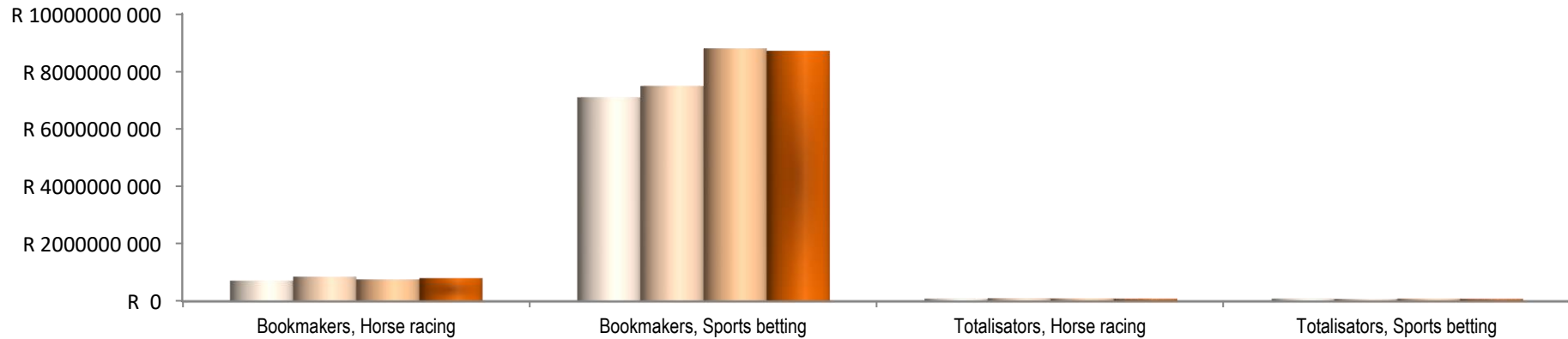
## Bookmakers & Totalisators



# Quarterly betting GGR – FY2023/24

## Split between Bookmakers & Totalisators

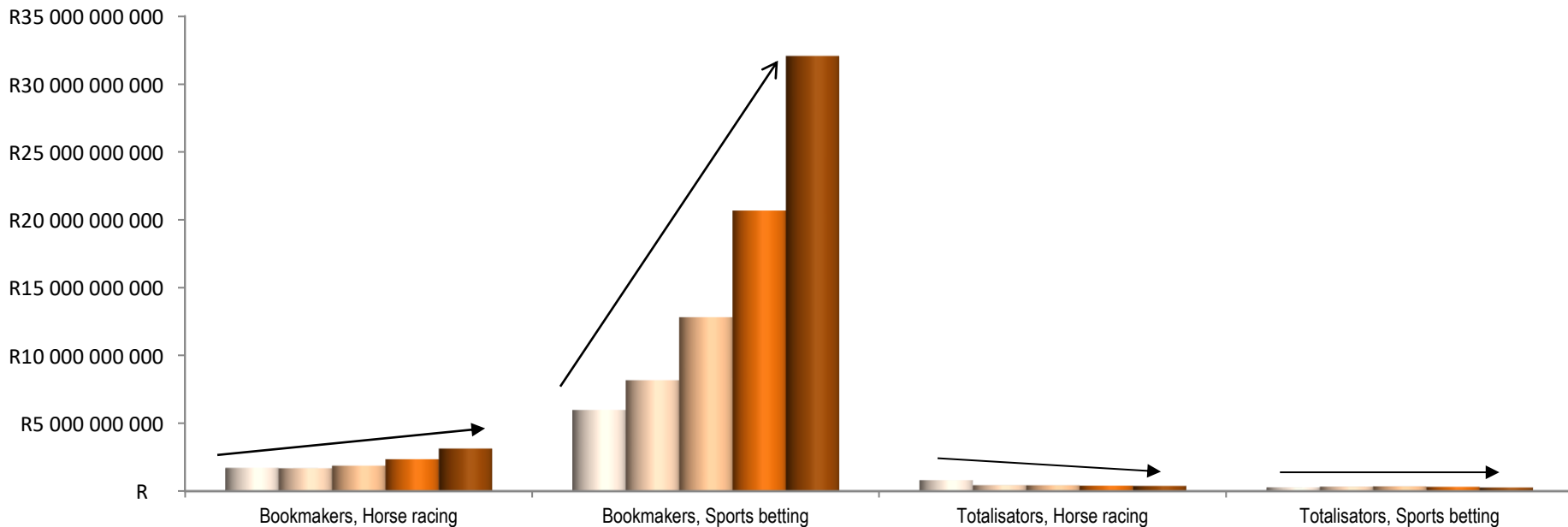
### Betting on horse racing & sport GGR



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
FY2023/24 (Qrt 1)	R 714481 692	R 7091041 786	R 88198 651	R 88553 831
FY2023/24 (Qrt 2)	R 853577 113	R 7485150 498	R 103632 858	R 79239 342
FY2023/24 (Qrt 3)	R 760064 261	R 8790905 545	R 93742 626	R 86770 319
FY2023/24 (Qrt 4)	R 804297 150	R 8706479 259	R 91609 032	R 85775 801



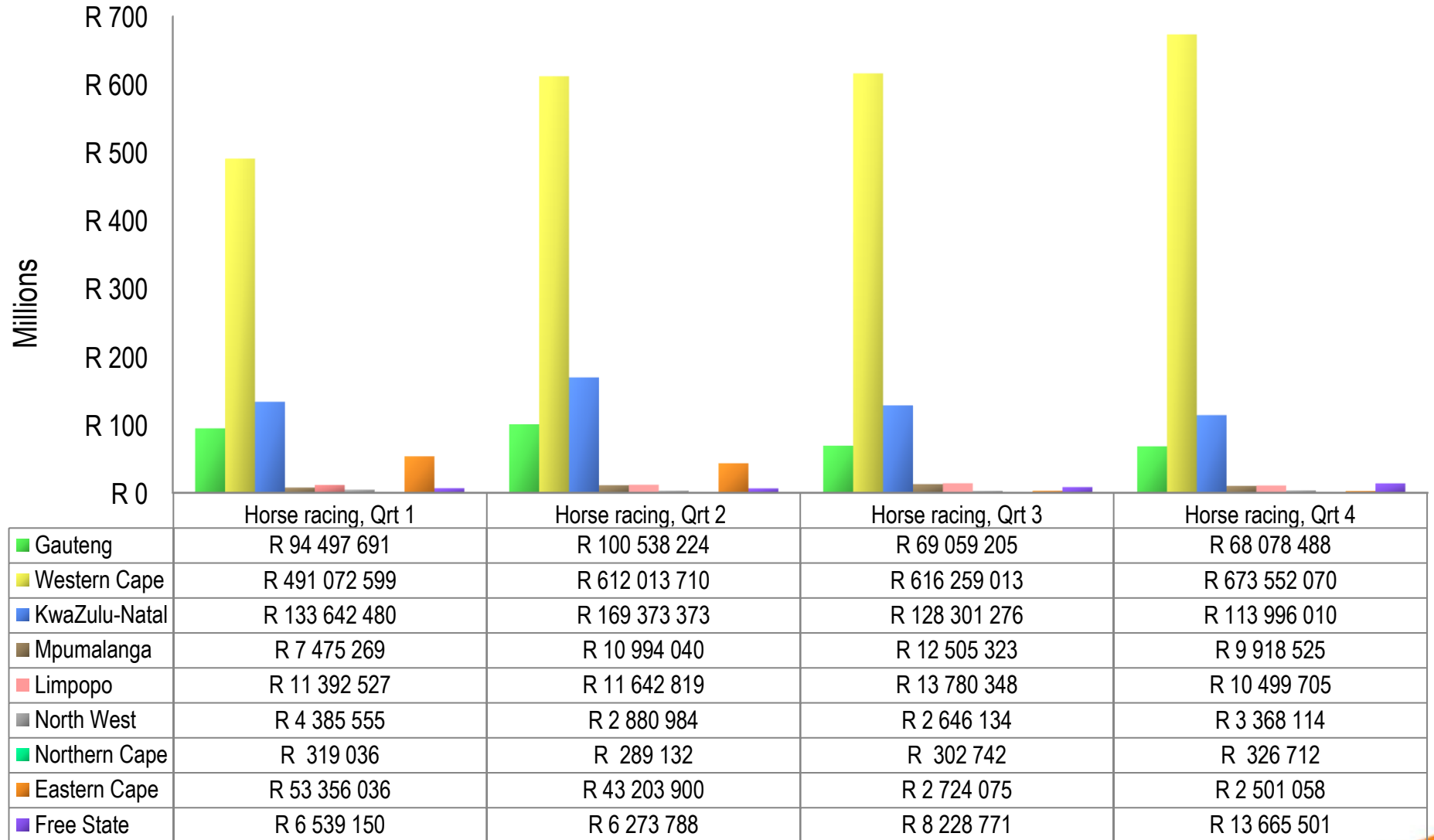
# Trend in GGR - betting (totalisators and bookmakers), FY2019/20 - FY2023/24



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
FY2019/20	R1 709 594 514	R5 981 461 167	R 803 813 609	R 269 158 347
FY2020/21	R1 683 065 295	R8 178 285 690	R 426 477 279	R 321 792 680
FY2021/22	R1 872 054 678	R12 832 845 899	R 419 575 899	R 343 876 171
FY2022/23	R2 349 467 556	R20 694 447 979	R 392 804 287	R 309 147 397
FY2023/24	R3 132 420 216	R32 073 577 088	R 377 183 168	R 254 563 491

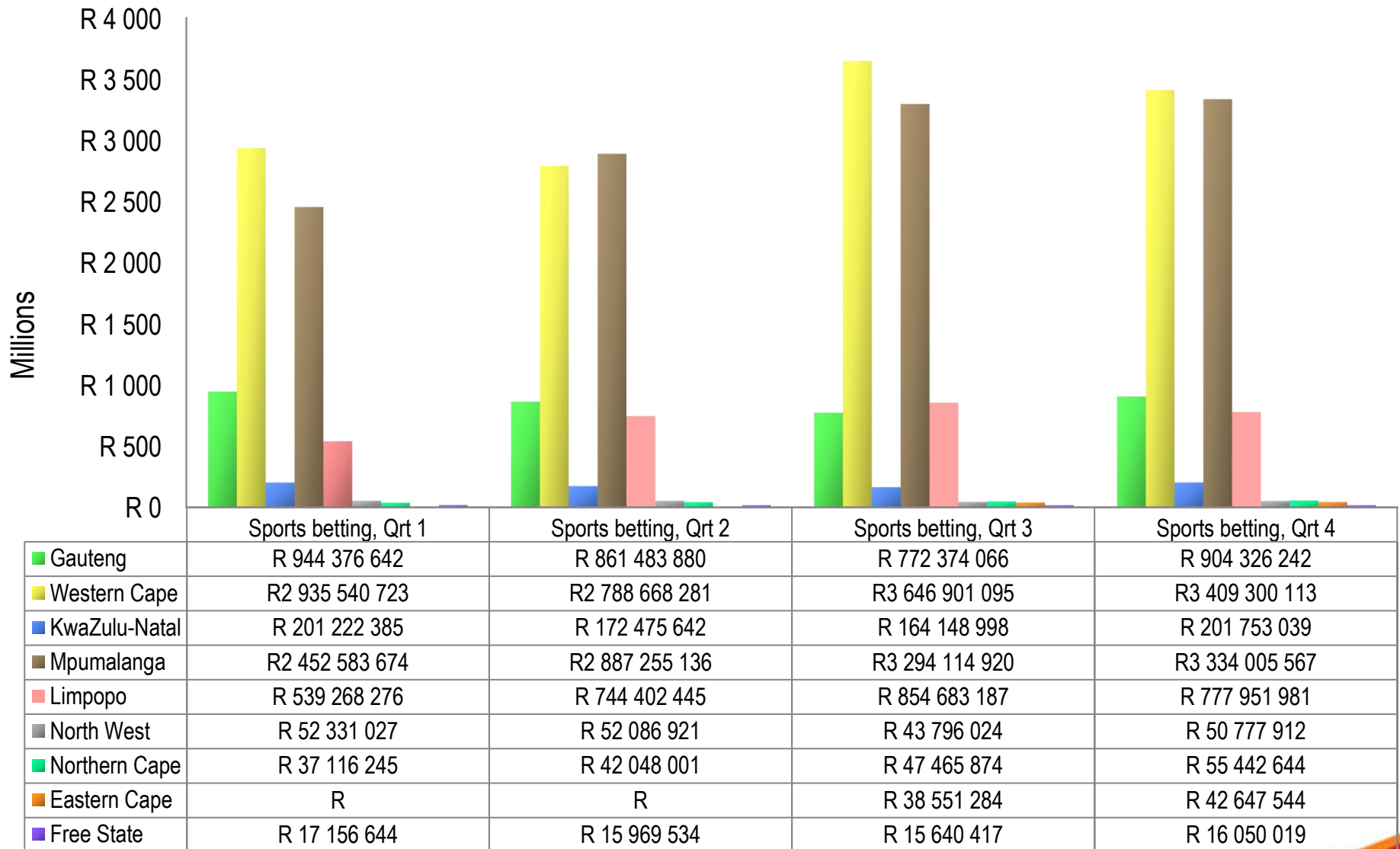
# Quarterly betting GGR – FY2023/24

## Betting on horse racing



# Quarterly betting GGR – FY2023/24

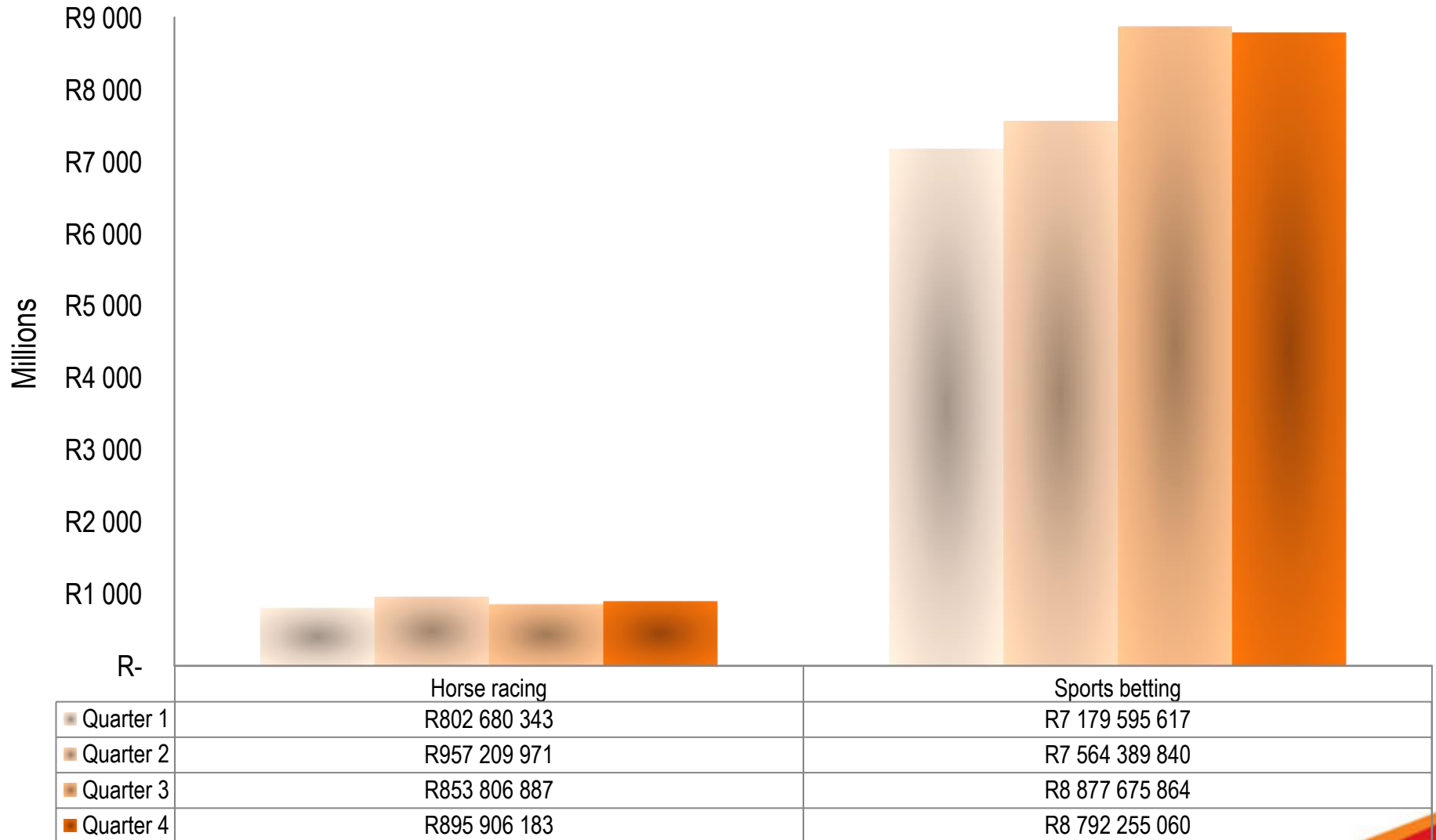
## Betting on sport and other contingencies



\* Eastern Cape Q1 & 2 Statistics for sports betting are included in the horse racing statistics

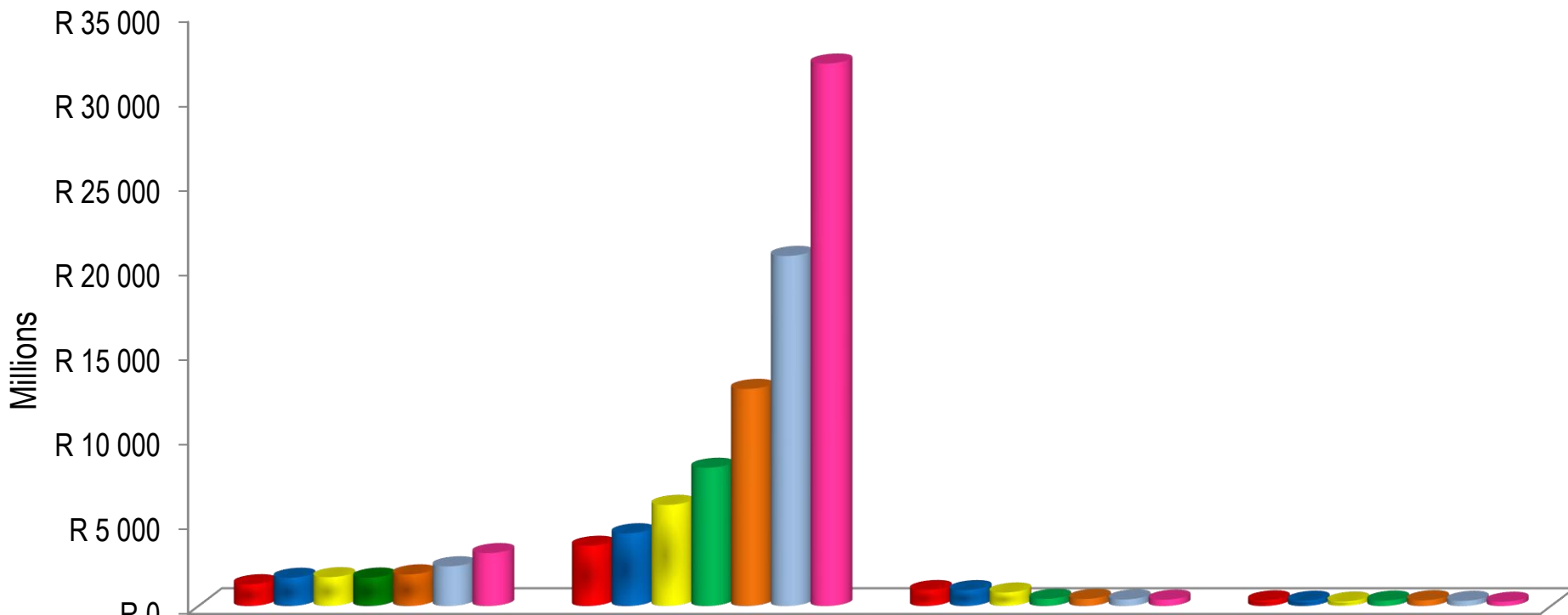
# Quarterly betting GGR – FY2023/24

## Horse racing v sport and other contingencies



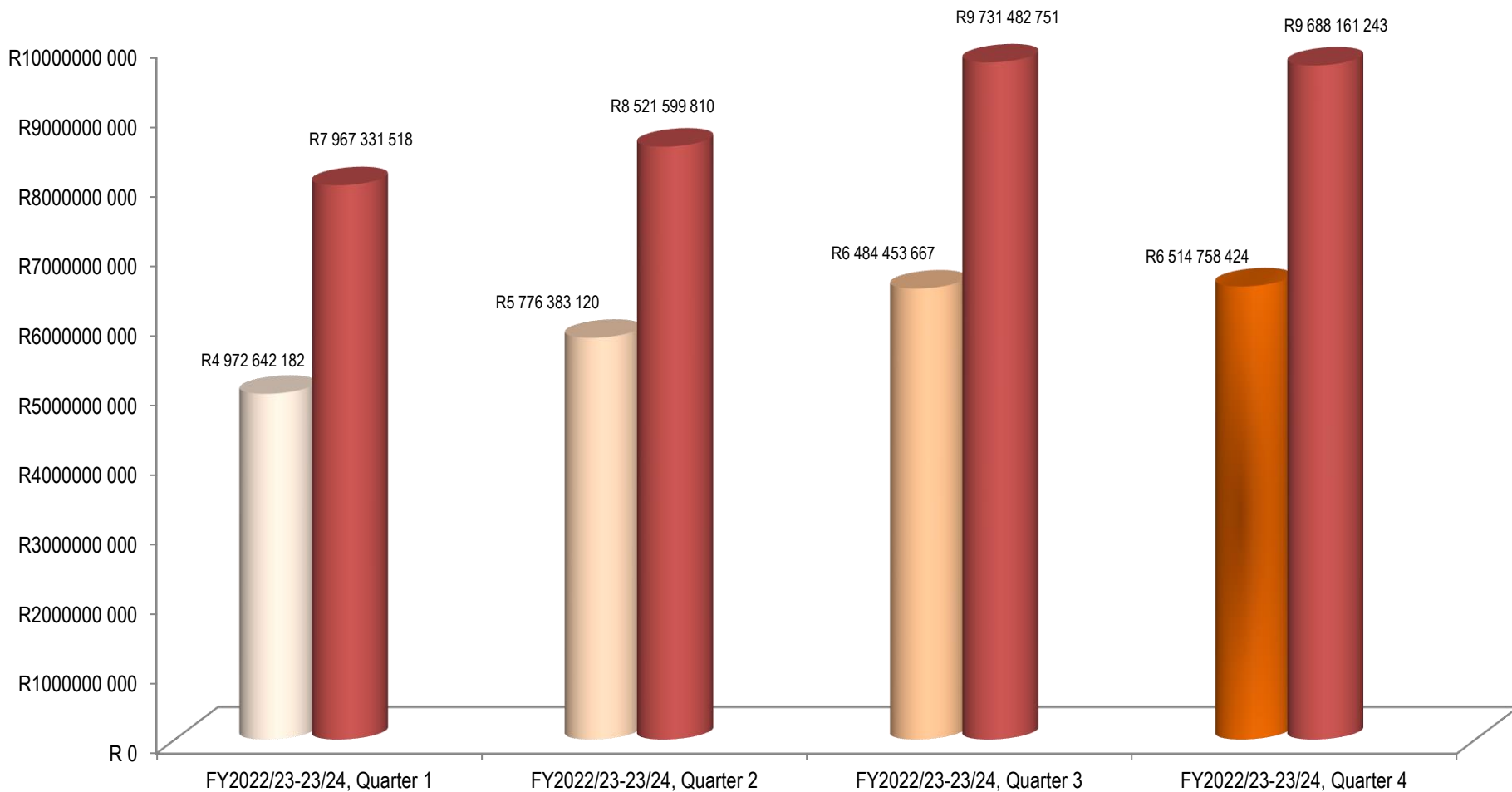
Eastern Cape Q1 and Q1 Statistics for sports betting are included in the horse racing

# Trend in GGR, bookmakers & totalisators FY2017/18 to FY2023/24



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
■ FY2017/18	R1 289 865 606	R3 563 907 799	R 947 674 300	R 335 385 203
■ FY2018/19	R1 670 139 602	R4 301 437 444	R 941 913 021	R 313 592 486
■ FY2019/20	R1 709 552 821	R5 982 739 609	R 803 813 609	R 269 158 347
■ FY2020/21	R1 682 465 082	R8 174 191 238	R 426 303 791	R 321 792 680
■ FY2021/22	R1 872 054 678	R12 832 845 899	R 423 413 731	R 343 876 171
■ FY2022/23	R2 349 467 556	R20 694 447 979	R 392 804 287	R 309 147 397
■ FY2023/24	R3 132 420 216	R32 073 577 088	R 377 183 168	R 254 563 491

# Trend in GGR betting on horse racing & sport – FY2022/23- FY2023/24



# Summary: GGR

- ❑ GGR generated in the gambling industry during FY2023/24 amounted to R59.3 billion. This represents a 25.7% increase from the previous year's GGR of R47.1 billion.
- ❑ The largest share of GGR was generated by the betting industry, amounting to over half (60.5%) of industry GGR, with casinos now standing at 29.3% market share.
- ❑ Gauteng has been overtaken by the Western Cape as the largest gambling market, with the Western Cape sitting at 31.7% market share at the end of FY2023/24. Gauteng (22.1%) and Mpumalanga (21.9%) hold roughly equal market shares.
- ❑ The betting industry's market shares continued to expand from 50.3% in FY2022/23 to 60.5% in FY2023/24.
- ❑ GGR growth was high for the Western Cape and Mpumalanga at 53.6% and 49.3% respectively. Limpopo and the Northern Cape also experienced high growth at 42.1% and 29.3% respectively. The remaining provinces saw low or declining growth figures. Gauteng and Free State's GGR grew by 2.5% and 4.0% respectively. KZN, North West and Eastern Cape saw declining revenues at -0.8%, -2.5% and -7.7% each.



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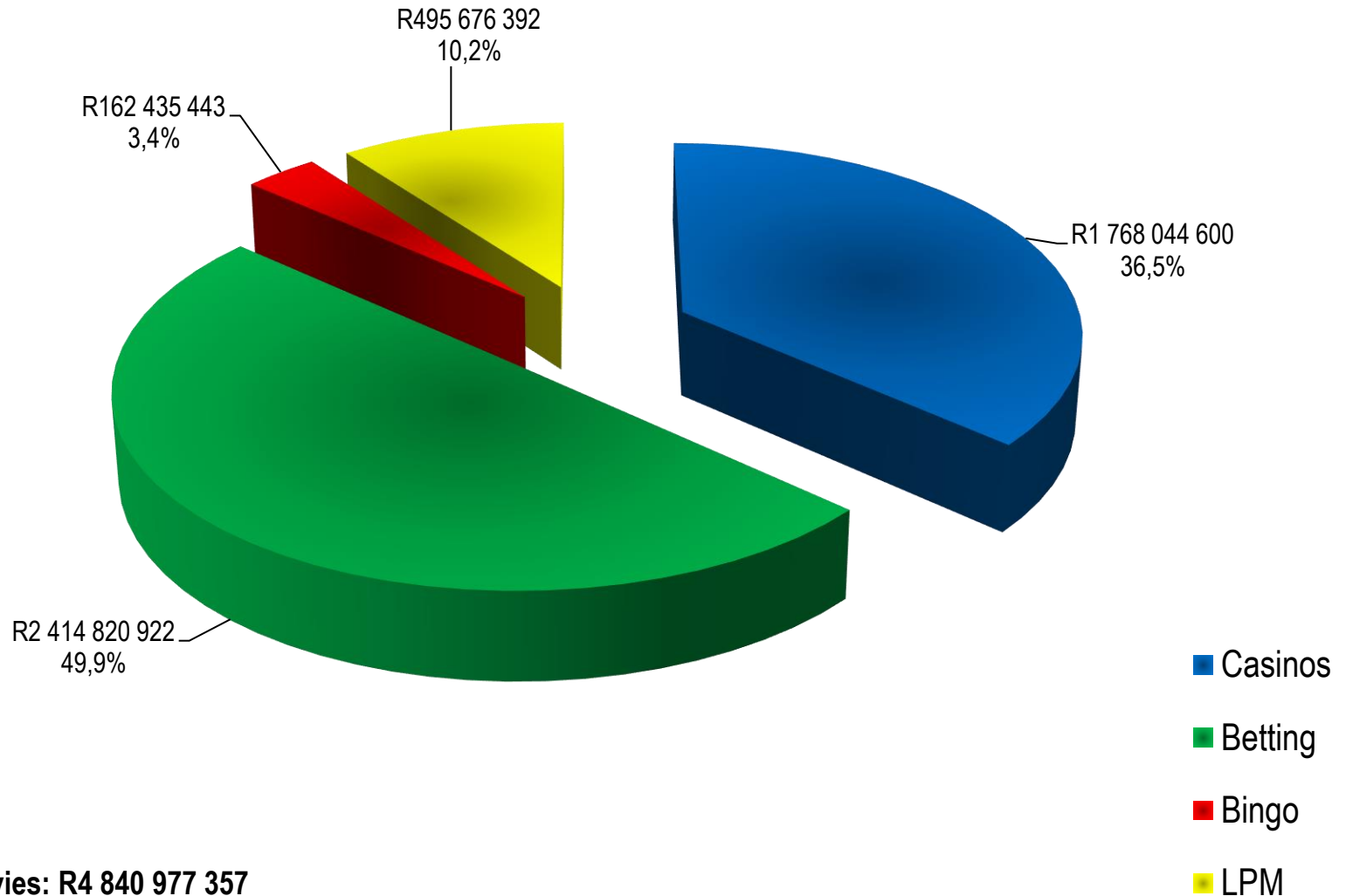
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# TAXES/LEVIES FROM GAMBLING



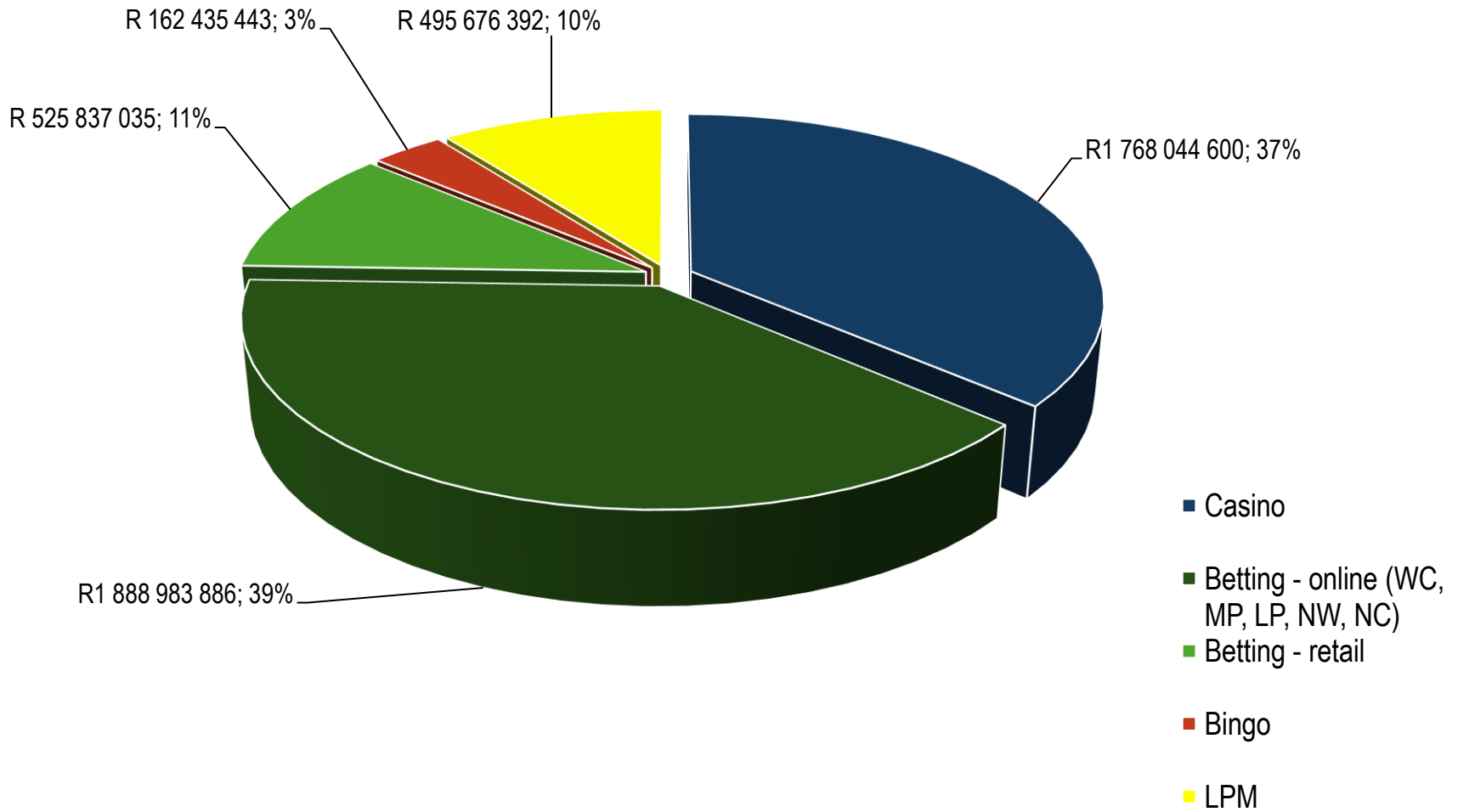


# Taxes/levies per gambling mode, all provinces, FY2023/24



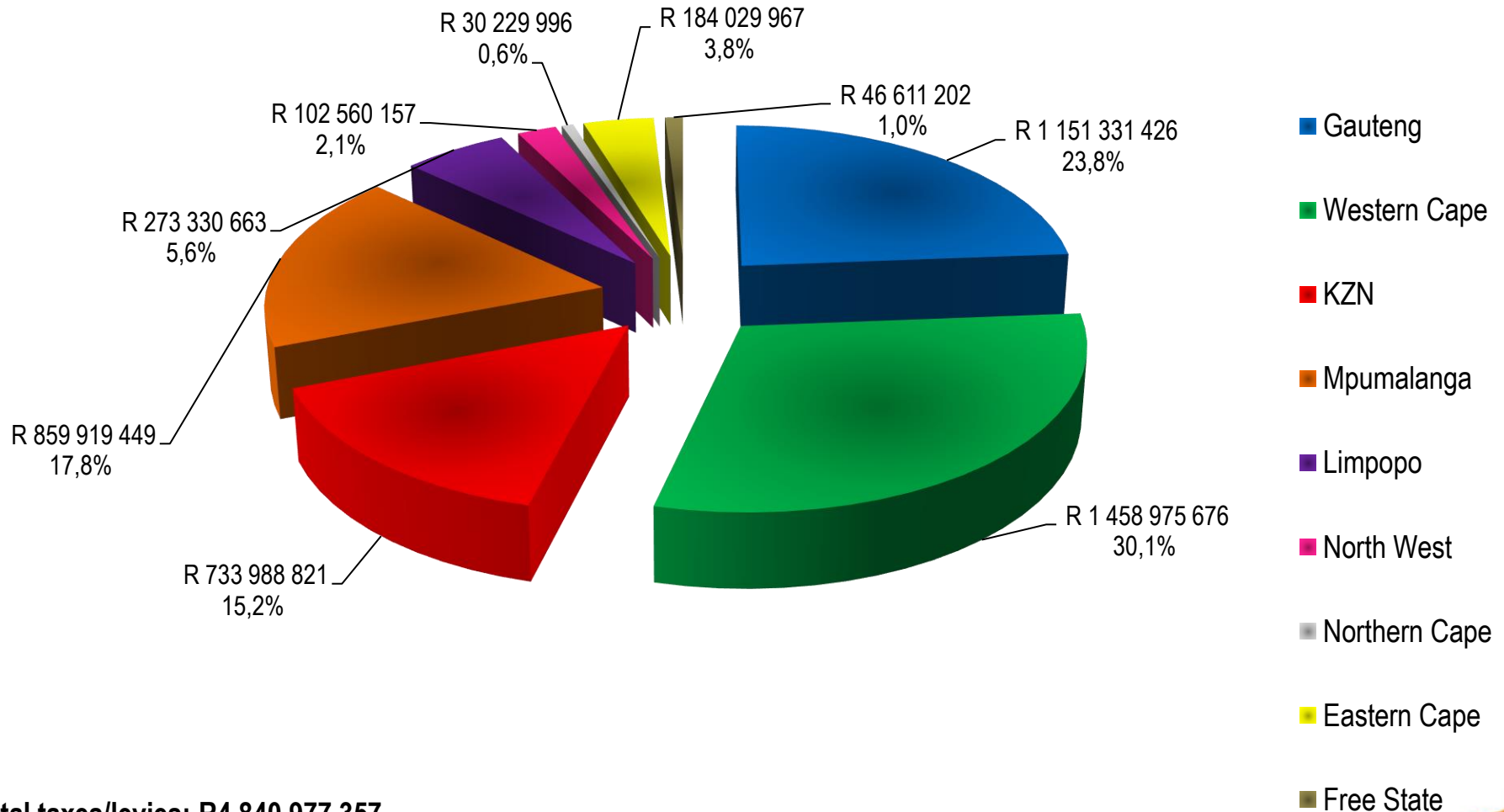
Total taxes/levies: R4 840 977 357

# Taxes/levies per gambling mode, all provinces, FY2023/24



Total taxes/levies: R4 840 977 357

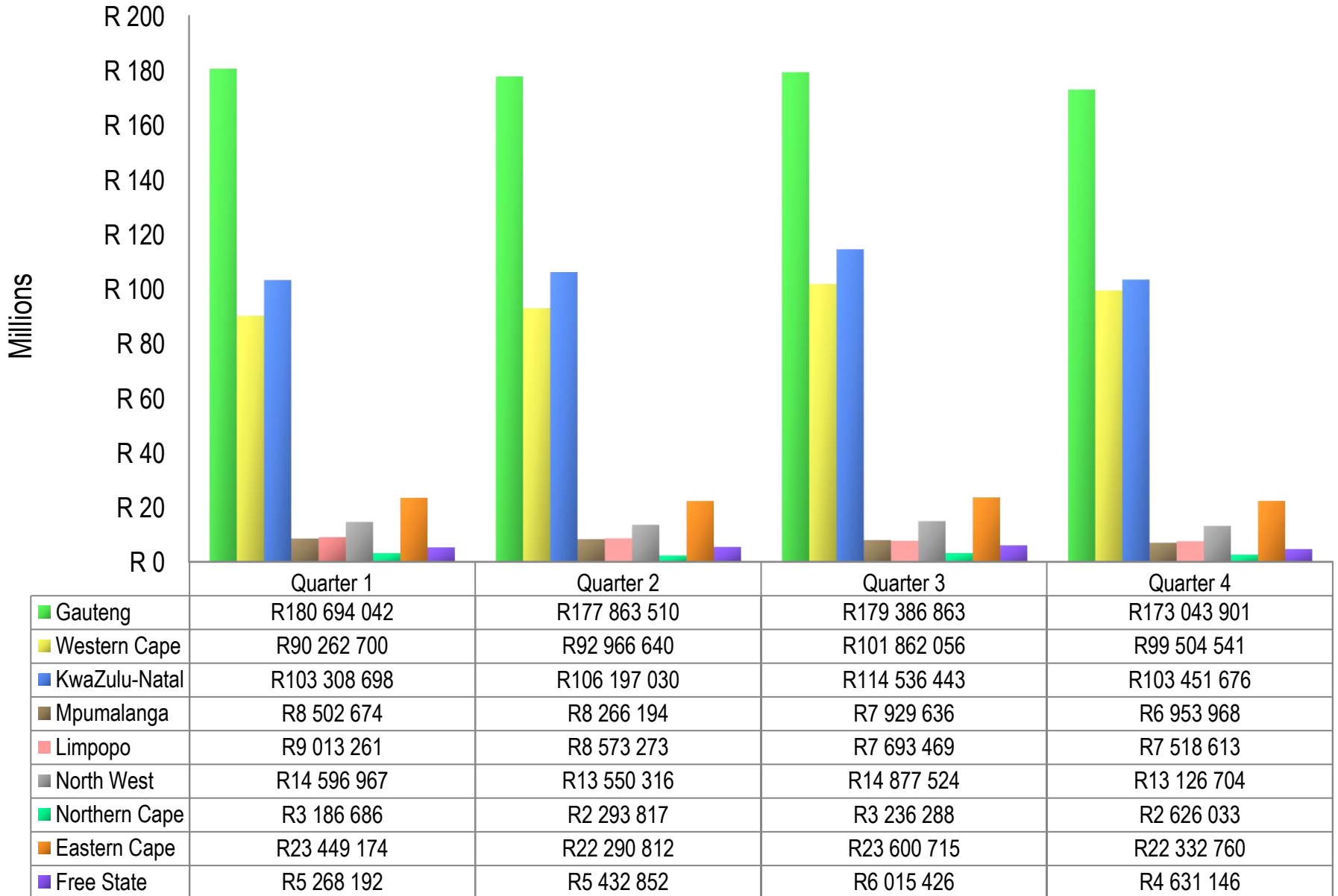
# Taxes per province, all modes, FY2023/24



Total taxes/levies: R4 840 977 357

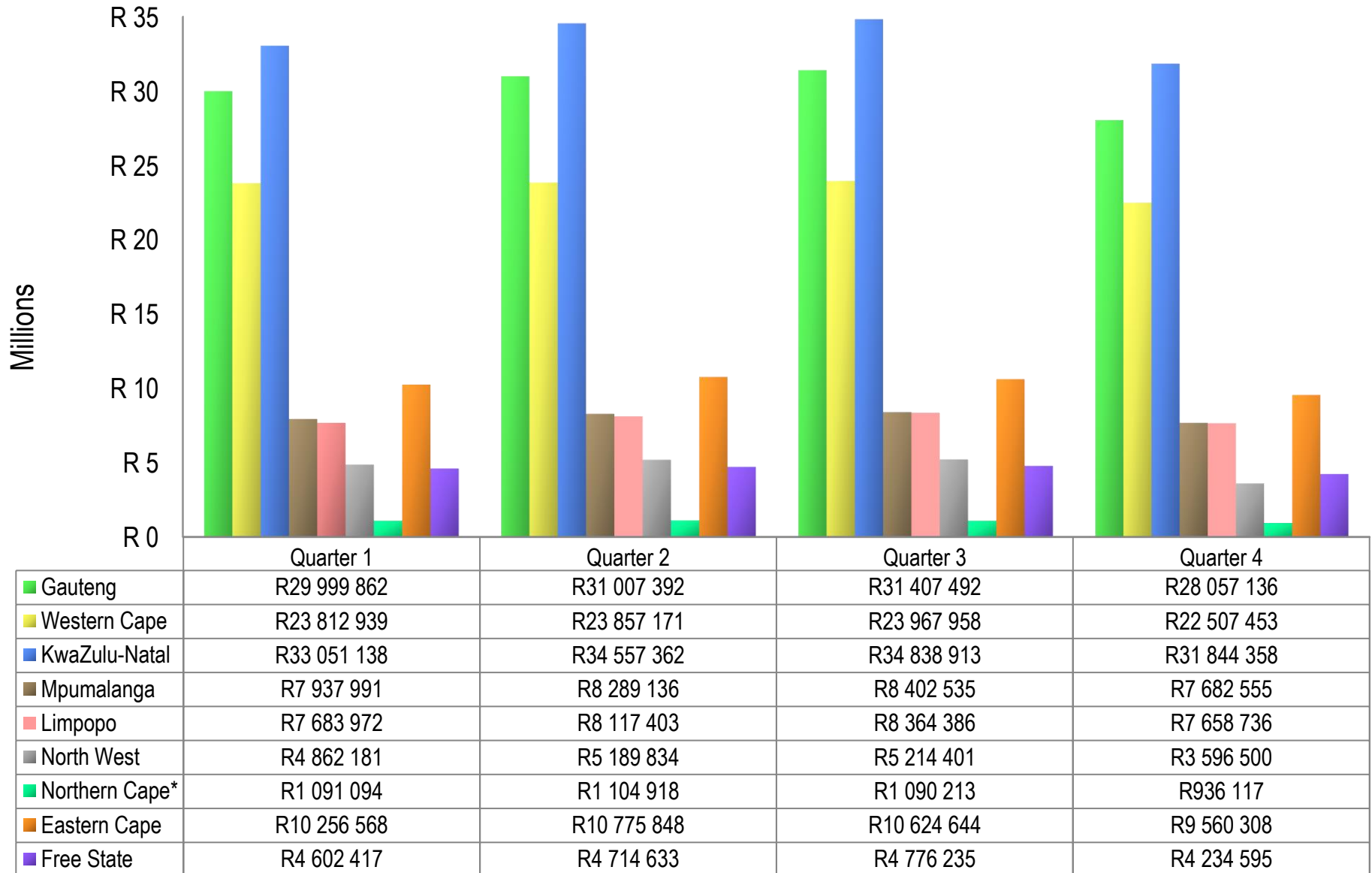
# Quarterly casino taxes/levies - FY2023/24

Gambling tax levied and collected by PLAs



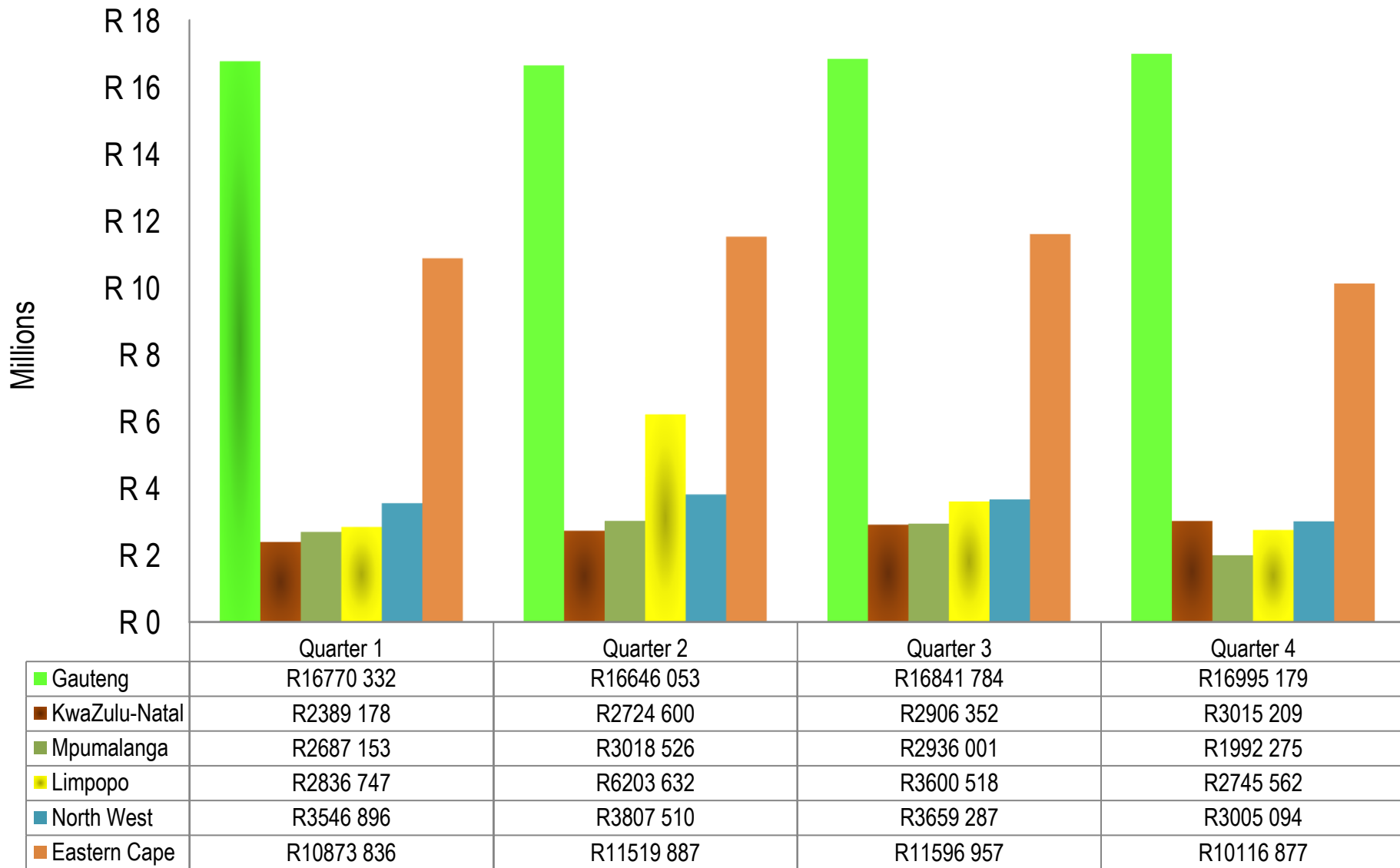
# Quarterly LPM taxes/levies - FY2023/24

Gambling tax levied and collected by PLAs



# Quarterly bingo taxes/levies - FY2023/24\*

Gambling tax levied by and collected by PLAs

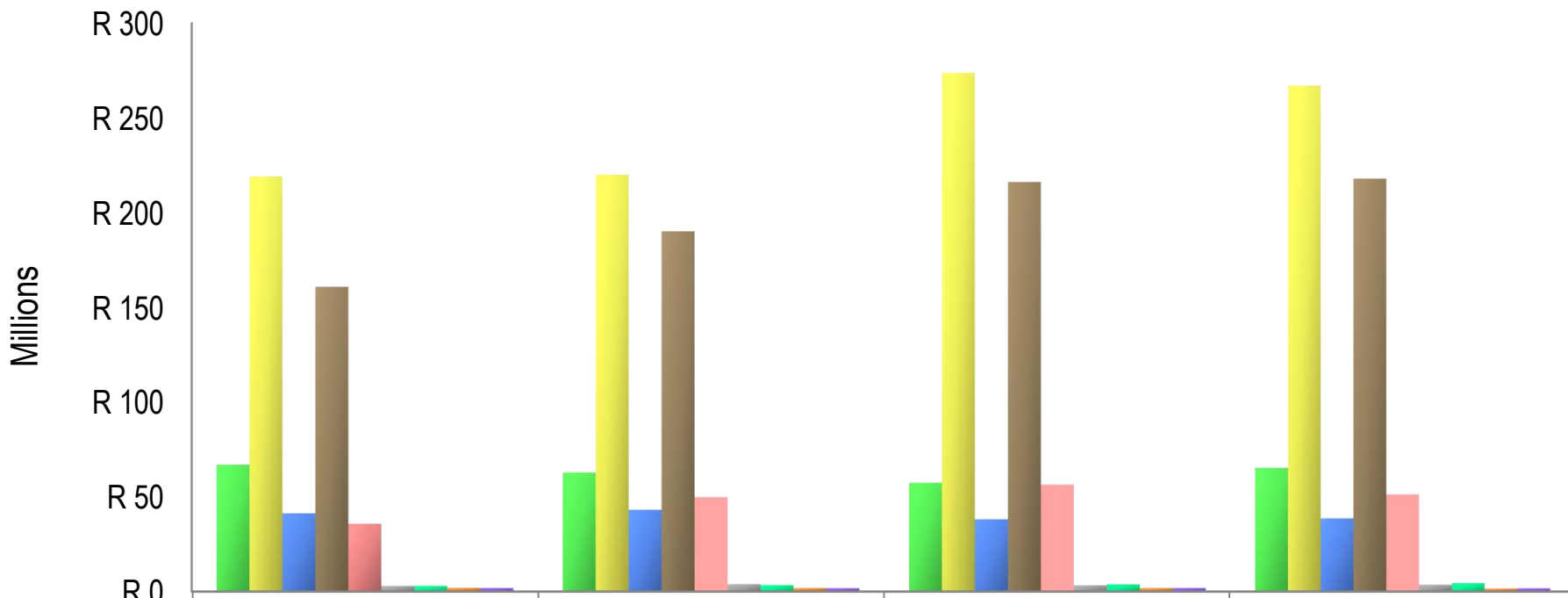


- Bingo offered for play in Gauteng, Mpumalanga, North West, Eastern Cape and KwaZulu-Natal only

# Quarterly betting taxes/levies – FY2023/24

## Bookmakers & Totalisators

Gambling tax levied and collected by PLAs



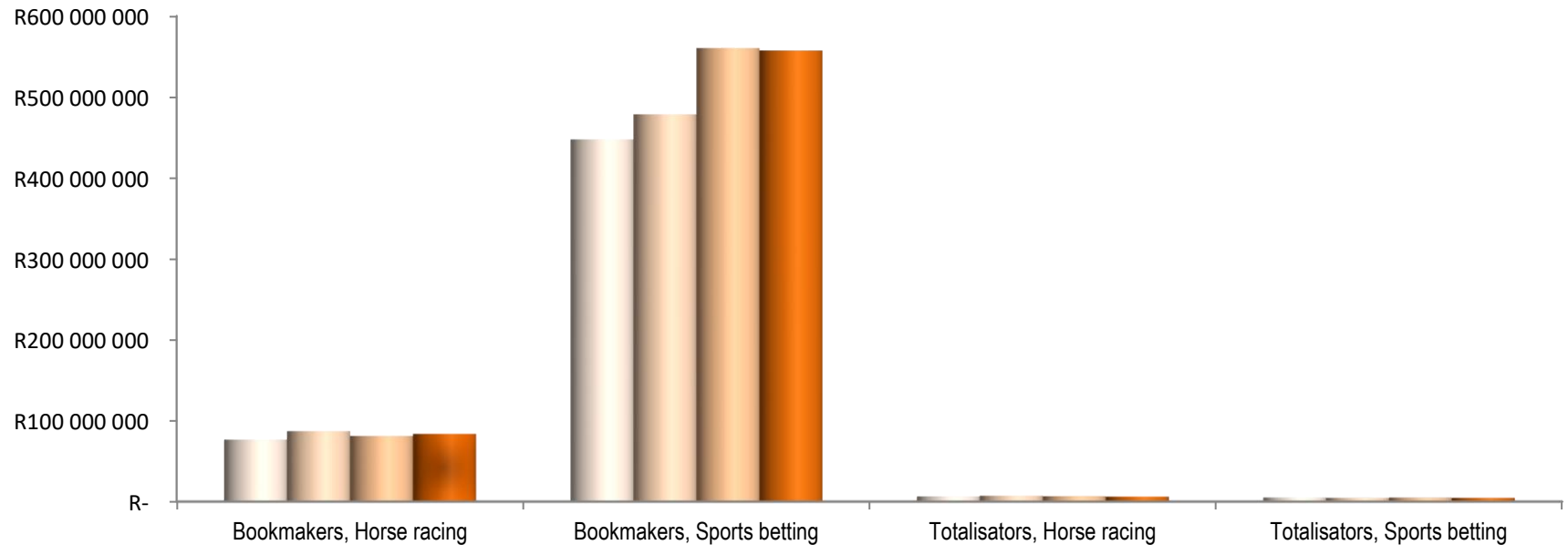
	Quarter 1	Quarter 2	Quarter 3	Quarter 4
■ Gauteng	R67 036 146	R62 846 997	R57 433 561	R65 301 177
■ Western Cape	R219 268 894	R220 139 906	R273 752 776	R267 072 641
■ KwaZulu-Natal	R41 303 175	R43 157 586	R38 102 351	R38 604 753
■ Mpumalanga	R160 931 576	R190 186 996	R216 201 756	R218 000 476
■ Limpopo	R 35790 935	R 49825 336	R 56455 209	R 51249 613
■ North West	R2 922 925	R3 844 453	R3 246 256	R3 513 308
■ Northern Cape	R2 994 822	R3 386 971	R3 821 489	R4 461 548
■ Eastern Cape	R1 921 300	R1 818 284	R1 780 718	R1 511 279
■ Free State	R1 784 926	R1 698 244	R1 821 876	R1 630 662

# Quarterly betting taxes/levies – FY2023/24

## Split between Bookmakers & Totalisators

### Horse racing v sport and other contingencies

Gambling tax levied and collected by PLAs



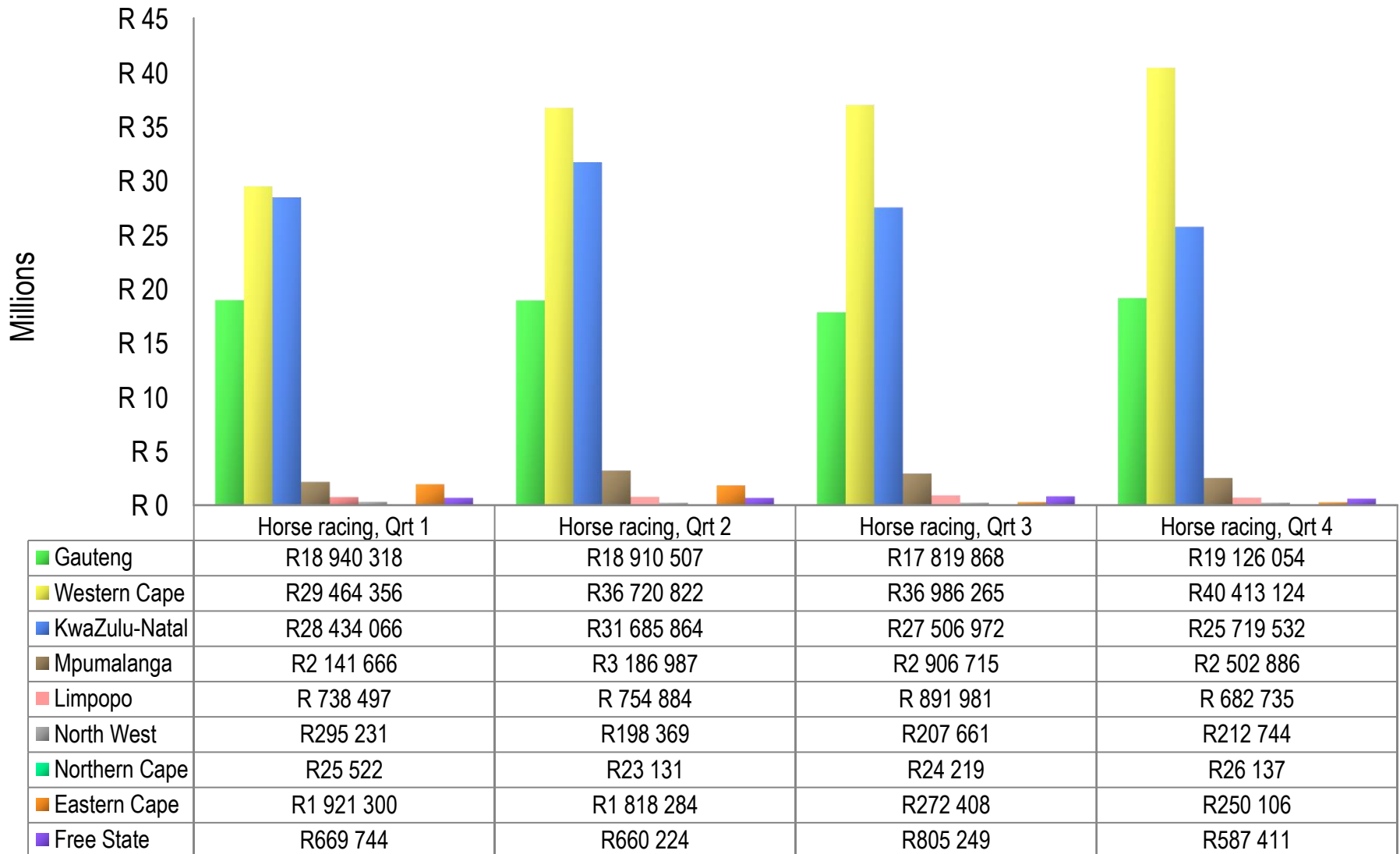
	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
FY2023/24 (Qrt 1)	R76 372 515	R447 459 284	R6 258 186	R4 900 192
FY2023/24 (Qrt 2)	R86 910 898	R478 496 133	R7 048 175	R4 449 568
FY2023/24 (Qrt 3)	R80 980 697	R560 375 113	R6 440 640	R4 819 541
FY2023/24 (Qrt 4)	R83 556 461	R557 403 743	R5 964 267	R4 420 987



# Quarterly betting taxes/levies – FY2023/24

## Betting on horse racing\*

Gambling tax levied by and collected by PLAs

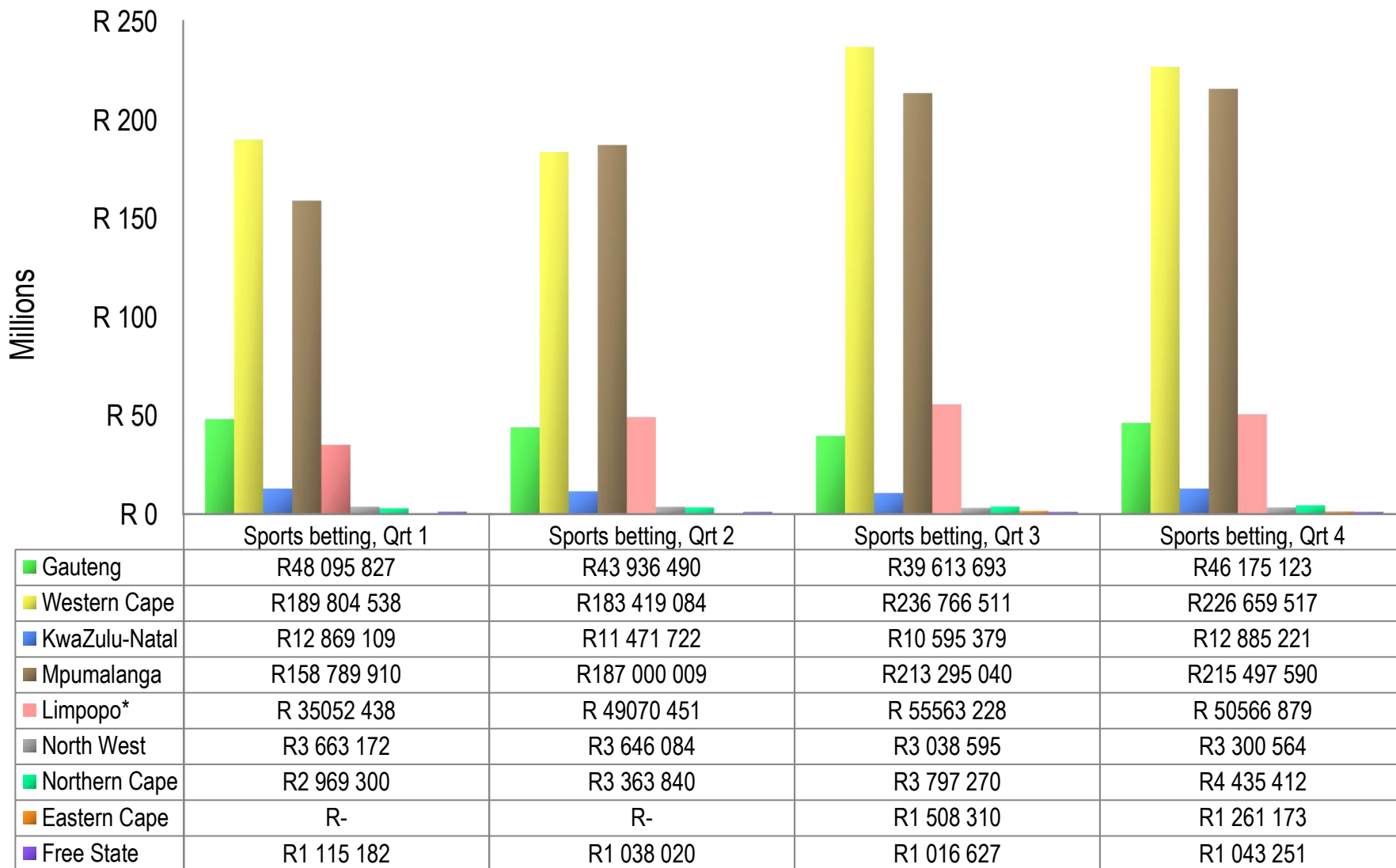


\* Eastern Cape: Statistics includes sports betting

# Quarterly betting taxes/levies – FY2023/24

## Betting on sport and other contingencies

Gambling tax levied and collected by PLAs

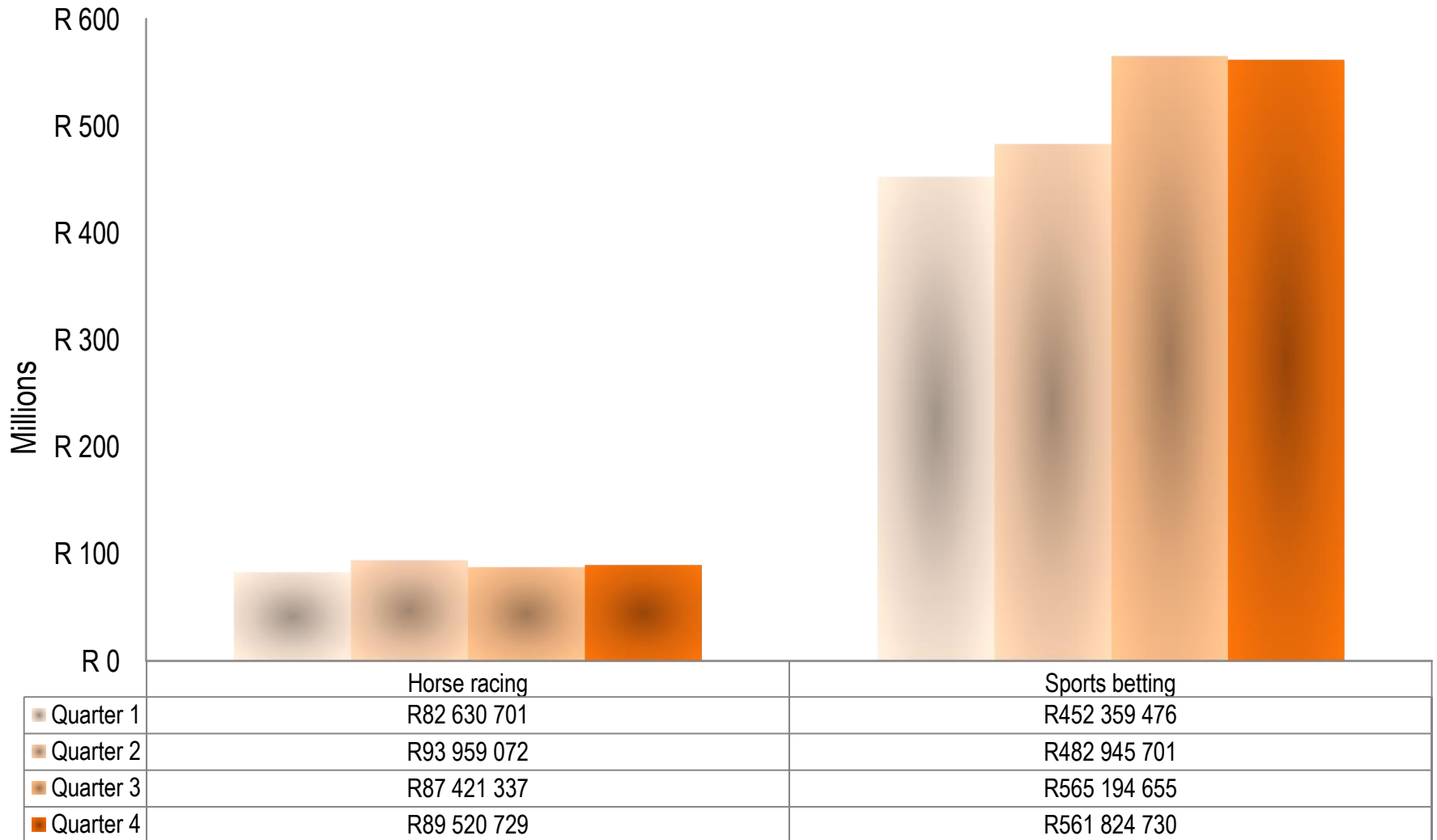


\* Eastern Cape Q1&2 Statistics for sports betting are included in the horse racing statistics

# Quarterly betting taxes/levies – FY2023/24

## Horse racing v sport and other contingencies

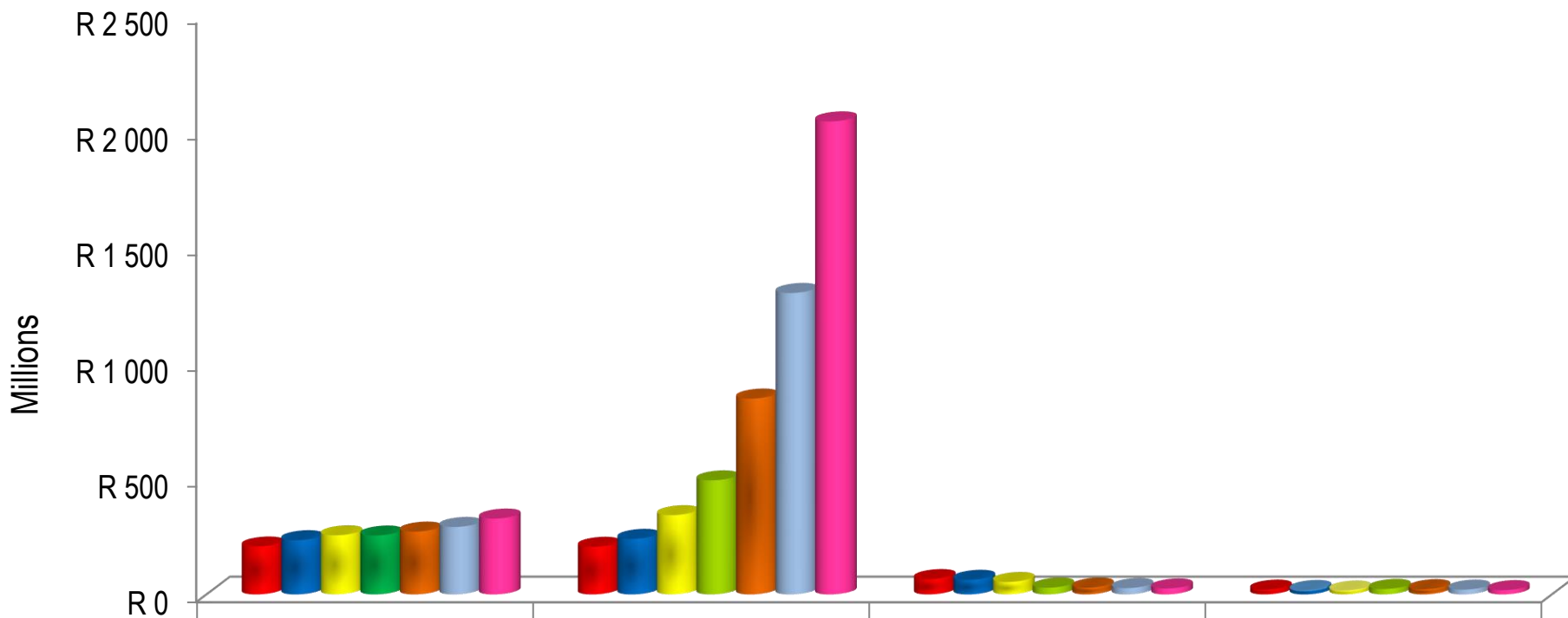
Gambling tax levied and collected by PLAs



\* Eastern Cape Q1&2 Statistics for sports betting are included in the horse racing statistics

# Trend in taxes/levies, bookmakers & totalisators, FY2017/18 to FY2023/24

Gambling tax levied and collected by PLAs



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
■ FY2017/18	R207 019 752	R205 840 847	R66 260 932	R20 695 820
■ FY2018/19	R234 294 564	R240 137 770	R63 114 440	R19 163 213
■ FY2019/20	R255 725 137	R342 839 295	R54 125 488	R17 218 199
■ FY2020/21	R254 604 053	R493 087 476	R29 106 630	R23 708 890
■ FY2021/22	R271 481 798	R846 678 613	R29 315 067	R22 596 620
■ FY2022/23	R291 734 219	R1 303 167 873	R27 581 589	R20 666 775
■ FY2023/24	R327 820 571	R2 043 734 273	R25 711 268	R18 590 288

# Trend in taxes/levies – FY2003/04 to FY2023/24

(all modes and provinces)

## Gambling tax levied and collected by PLAs

Trend in taxes/levies, all modes, from FY2003/04 – FY2023/24



# Summary : Taxes/Levies

- ❑ A total amount of R4.8 billion was collected during FY2023/24, which is 19.2% higher than the taxes/levies in the previous financial year.
- ❑ At 49.9%, betting contributed the highest amount of taxes/levies relative to other gambling modes followed by casinos at 36.5%.
- ❑ The Western Cape (30.7%) accounts for the largest share of taxes/levies generated across provinces, with Gauteng (23.8%) and Mpumalanga (17.8%) also generating sizable shares.



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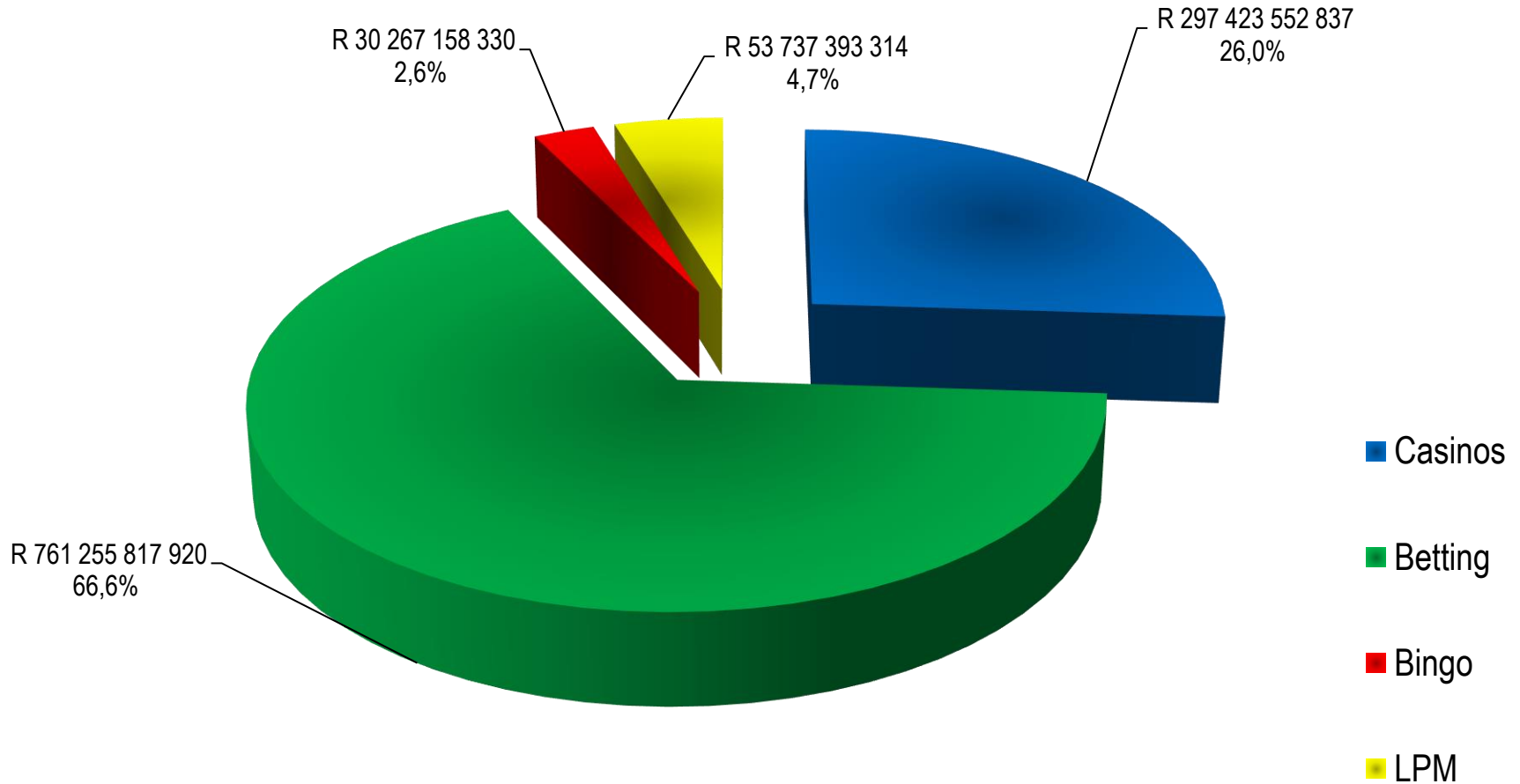
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# TURNOVER



# Turnover per gambling mode, all provinces, FY2023/24

The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion.

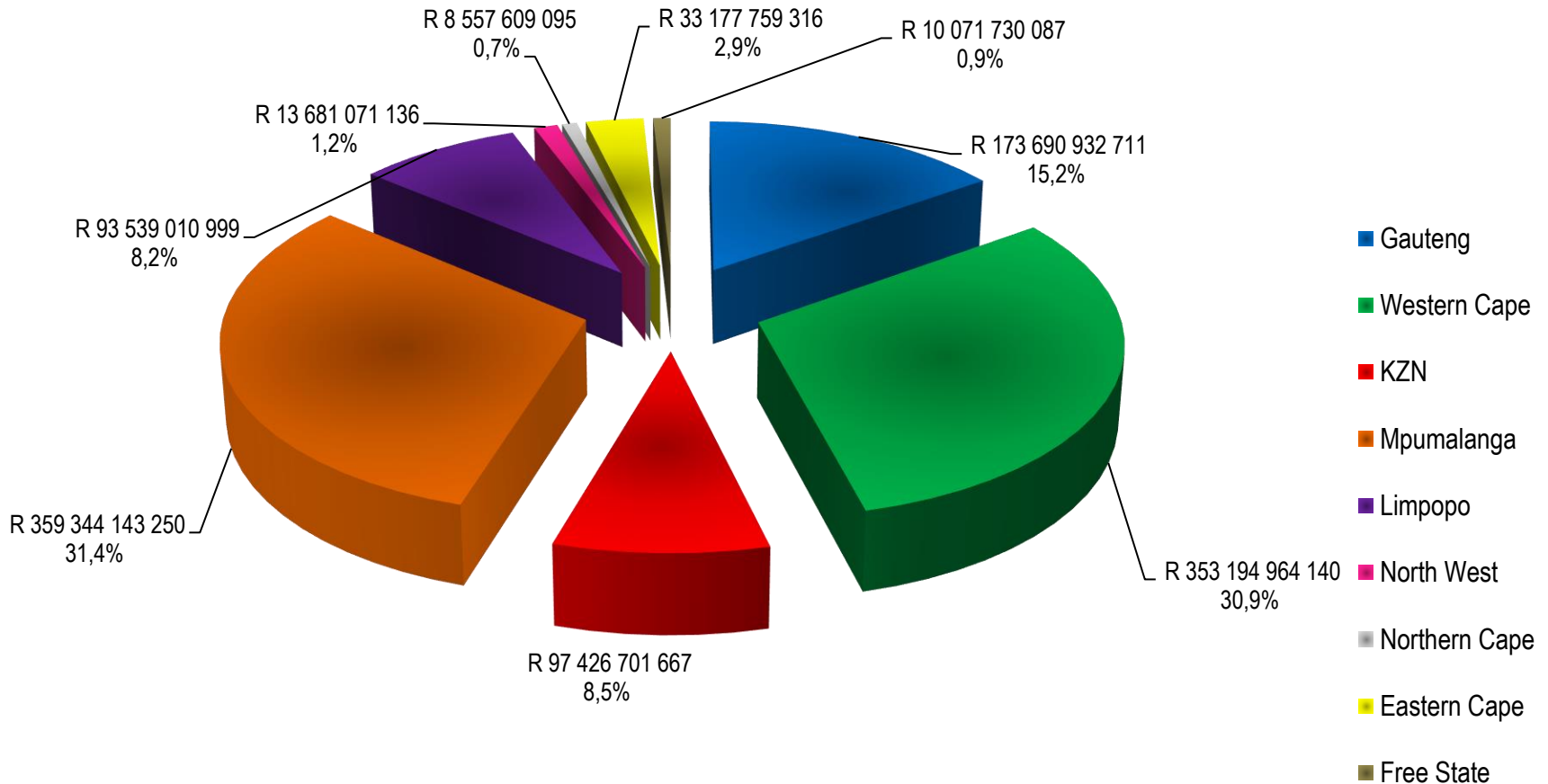


**Total turnover: R1 142 683 922 400**



# Turnover per province, all modes, FY2023/24

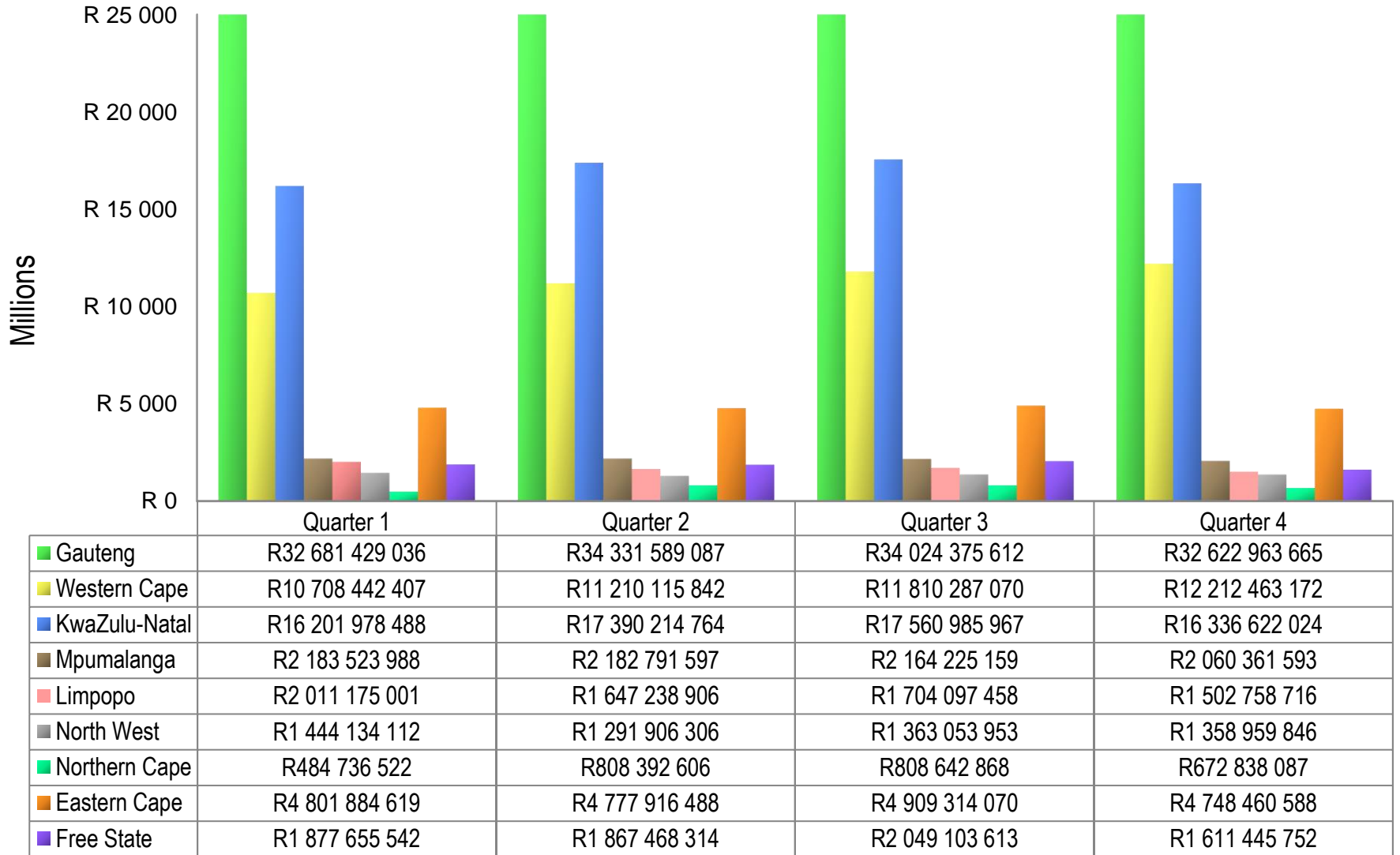
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion.



**Total turnover: R1 142 683 922 400**

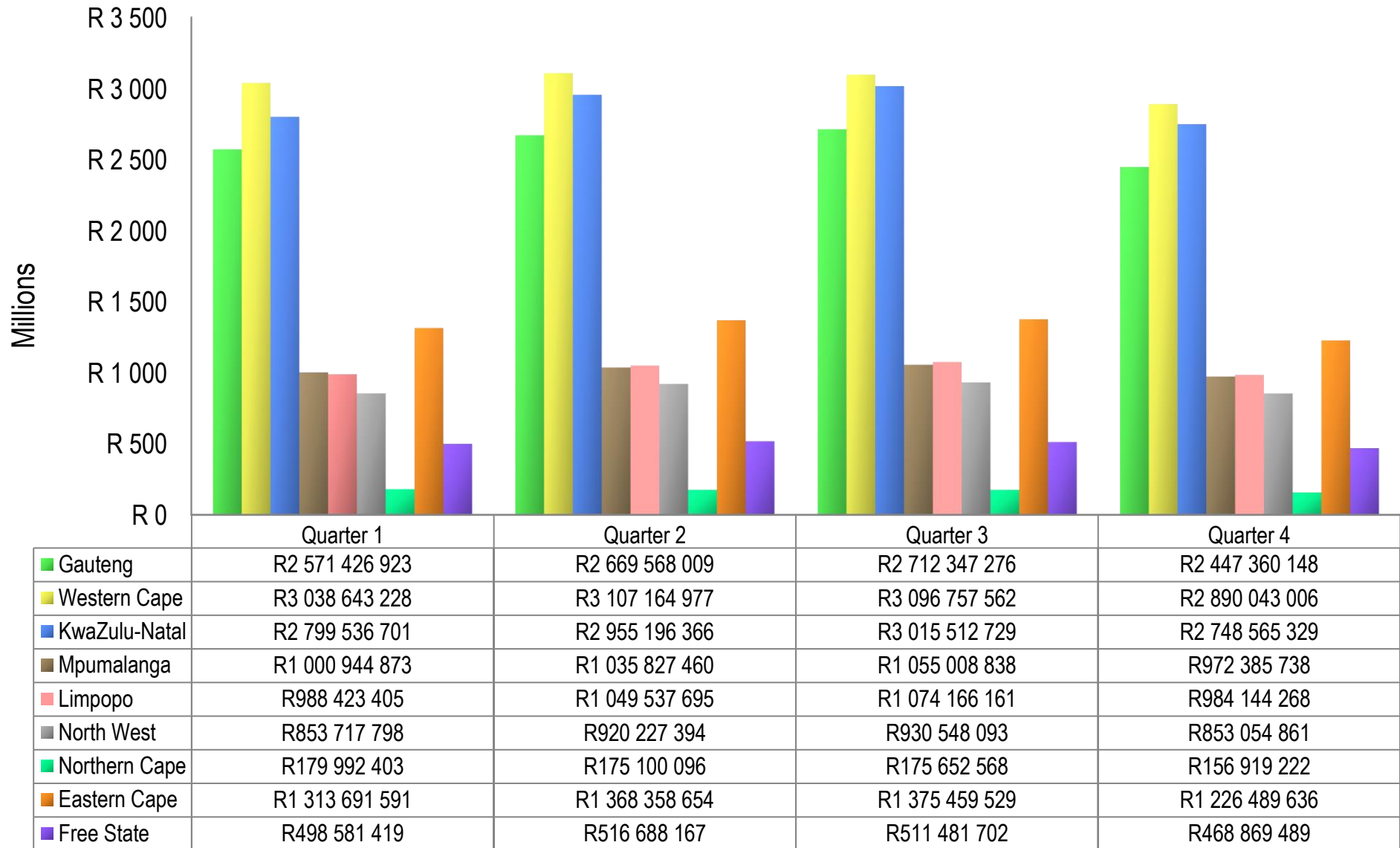
# Quarterly casino turnover - FY2023/24

The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



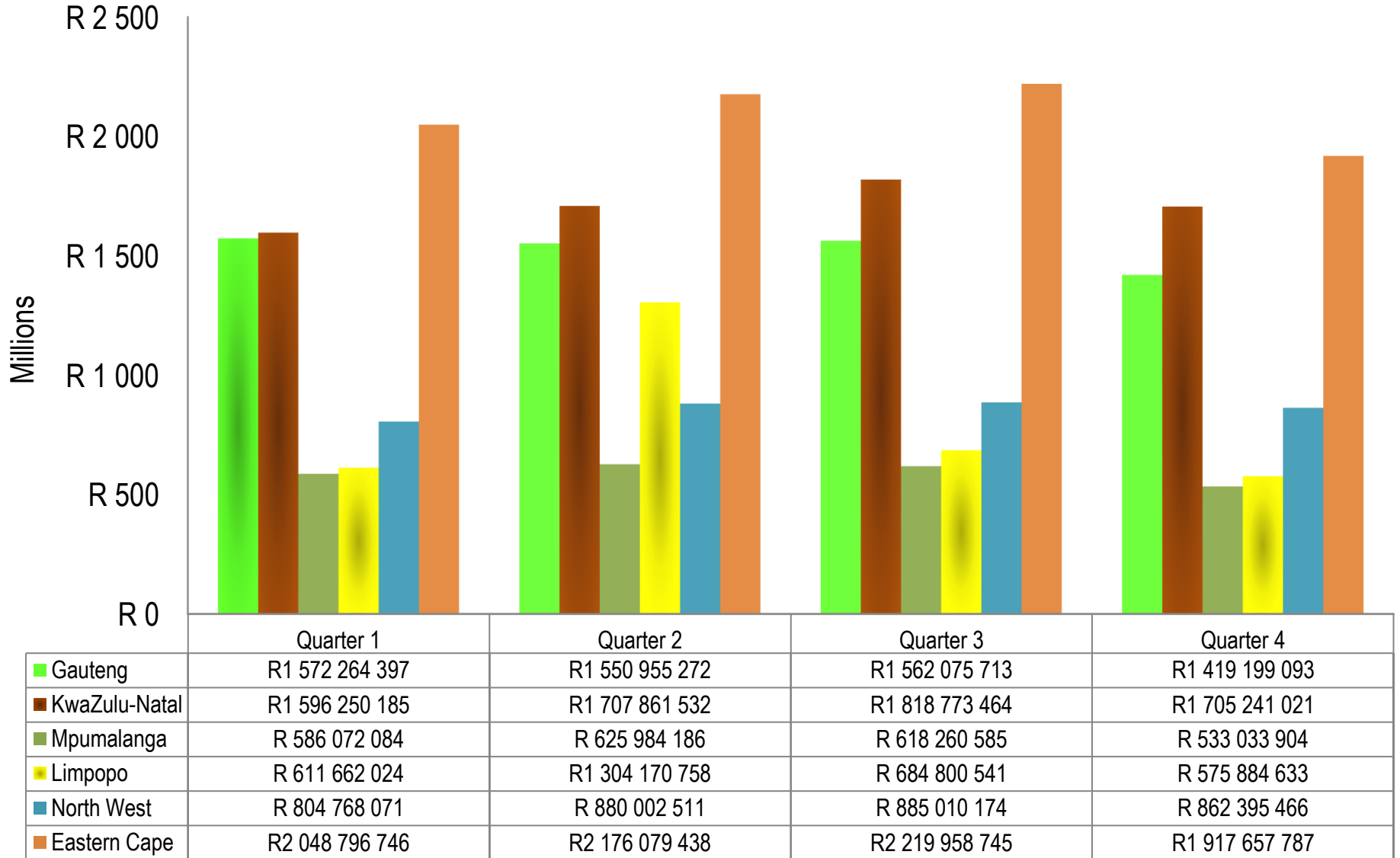
# Quarterly LPM turnover - FY2023/24

The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



# Quarterly bingo turnover - FY2023/24\*

The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion

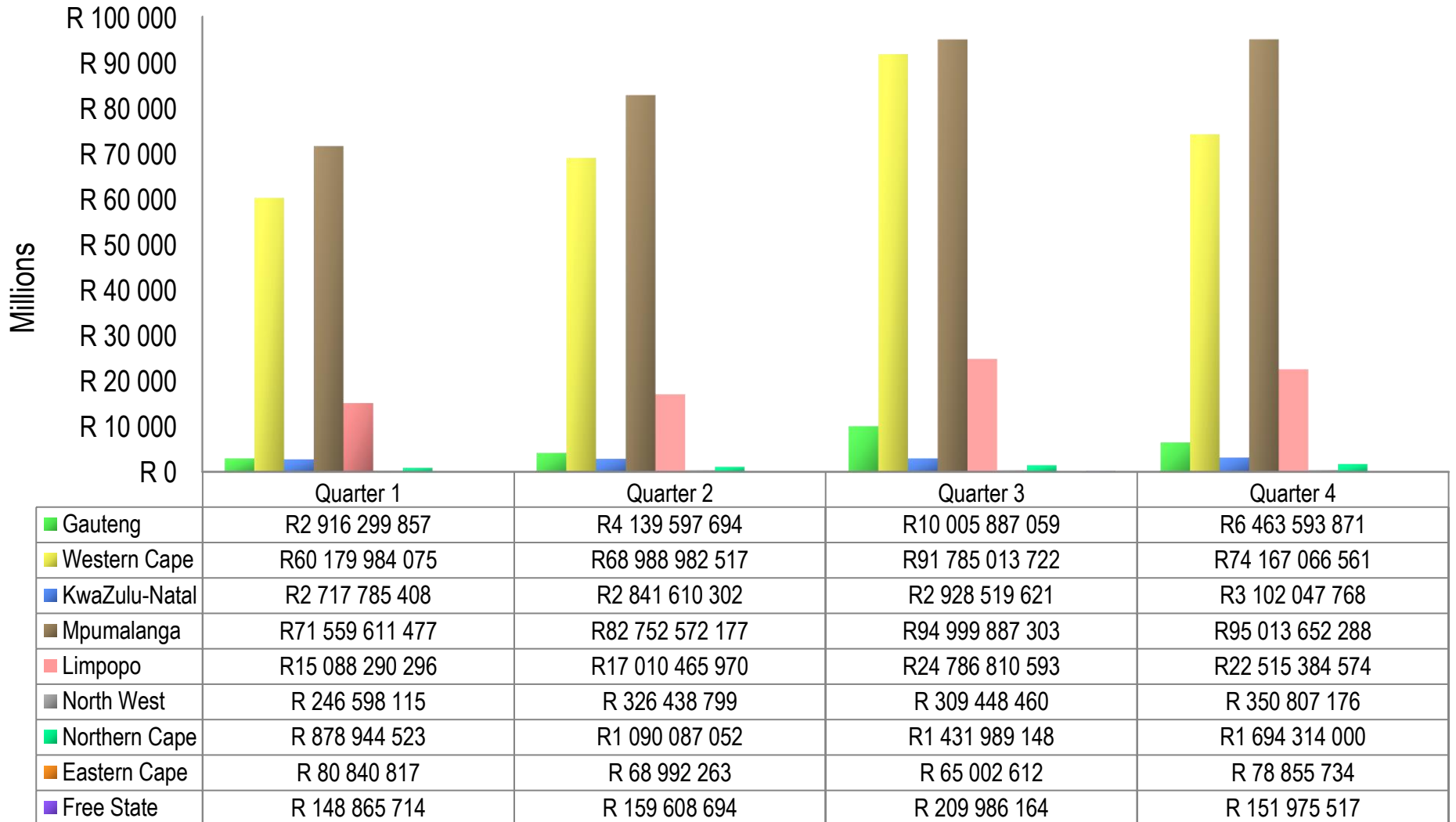


Bingo offered for play in Gauteng, Mpumalanga, North West, Limpopo, KwaZulu-Natal and Eastern Cape only

# Quarterly betting turnover – FY2023/24

## Bookmakers & Totalisators

The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion

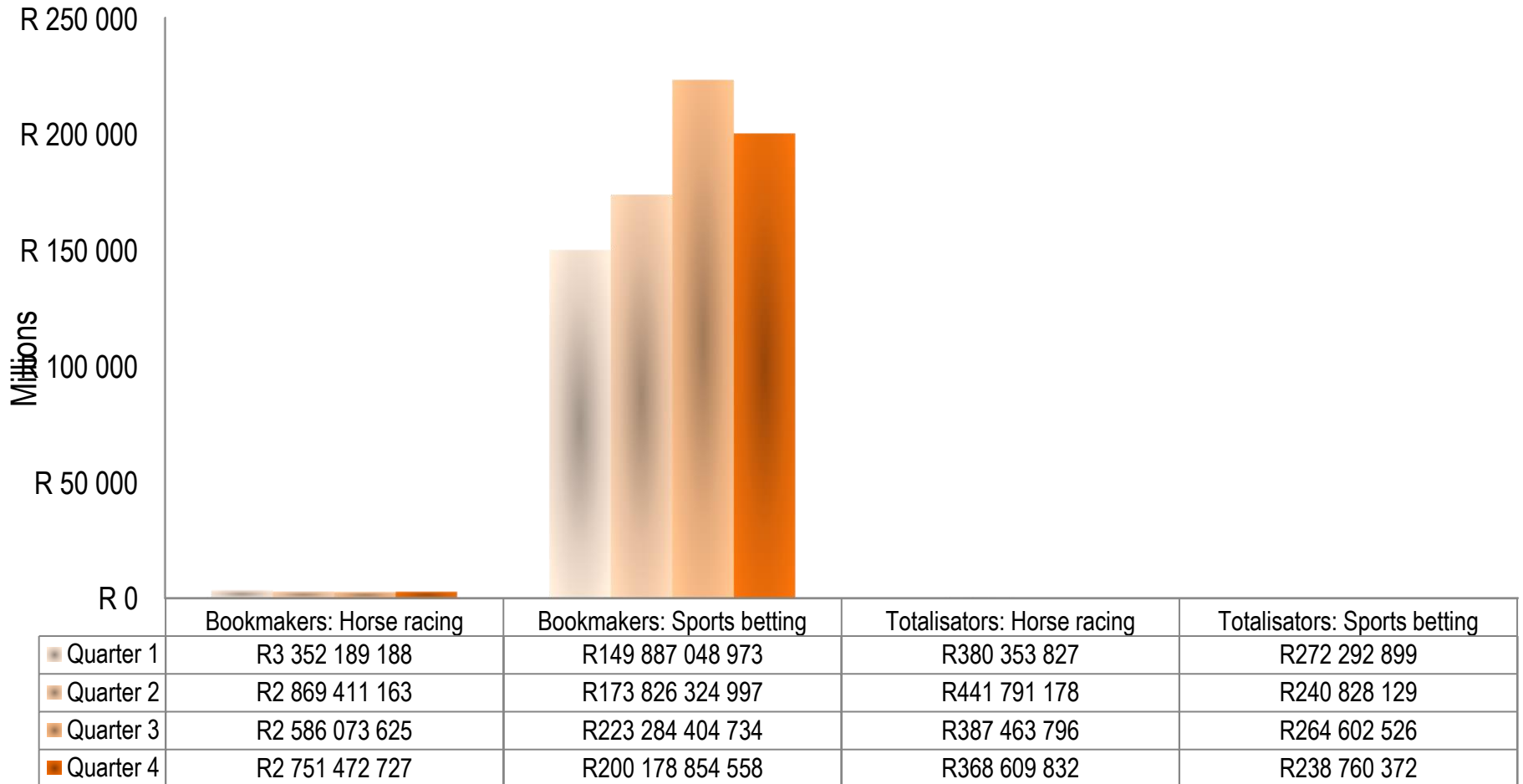


# Quarterly betting turnover – FY2023/24

## Split between Bookmakers & Totalisators

### Horse racing v sport and other contingencies

The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion

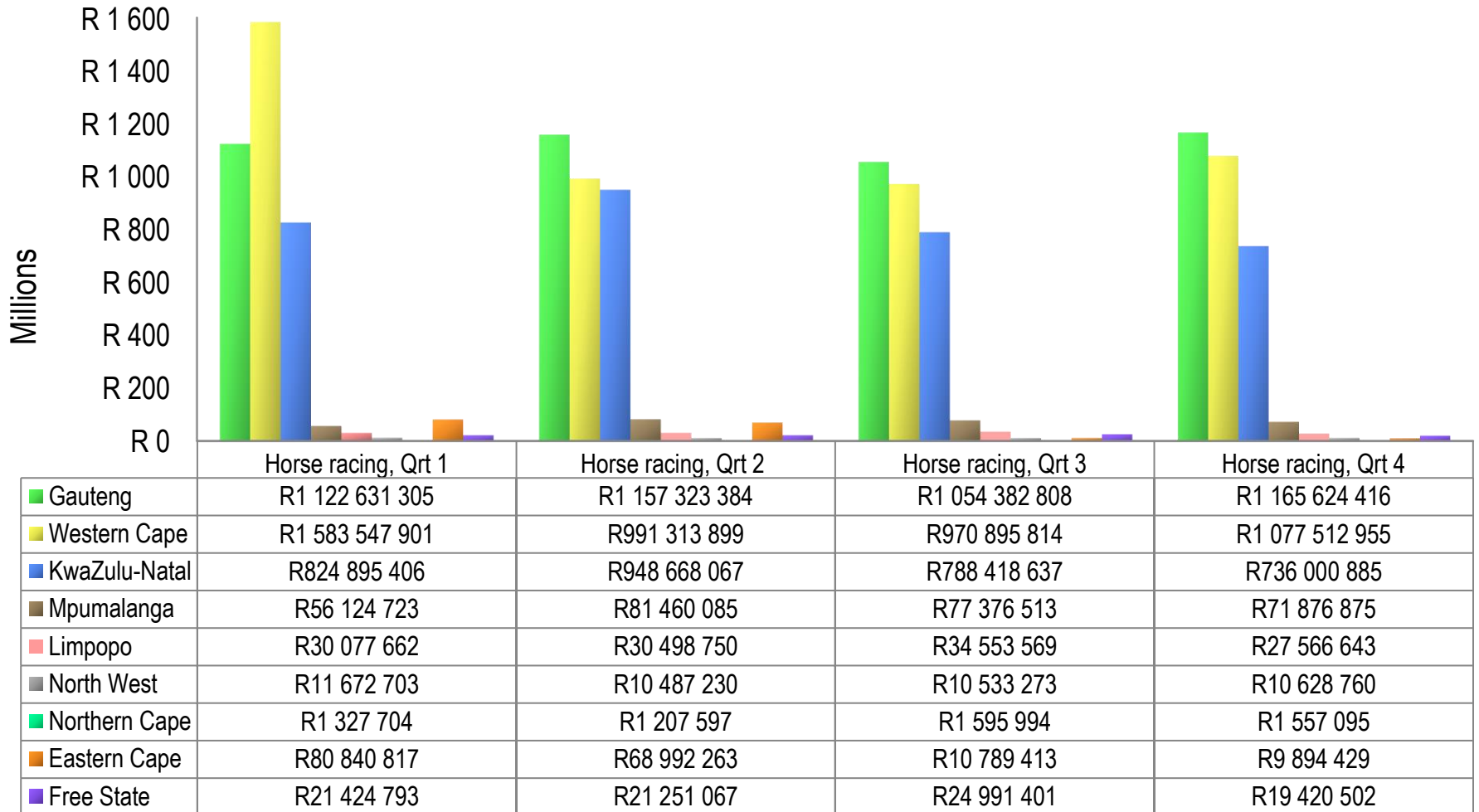


\* Eastern Cape Q1&2 horse racing statistics includes sports betting

# Quarterly betting turnover – FY2023/24

## Betting on horse racing\*

The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion

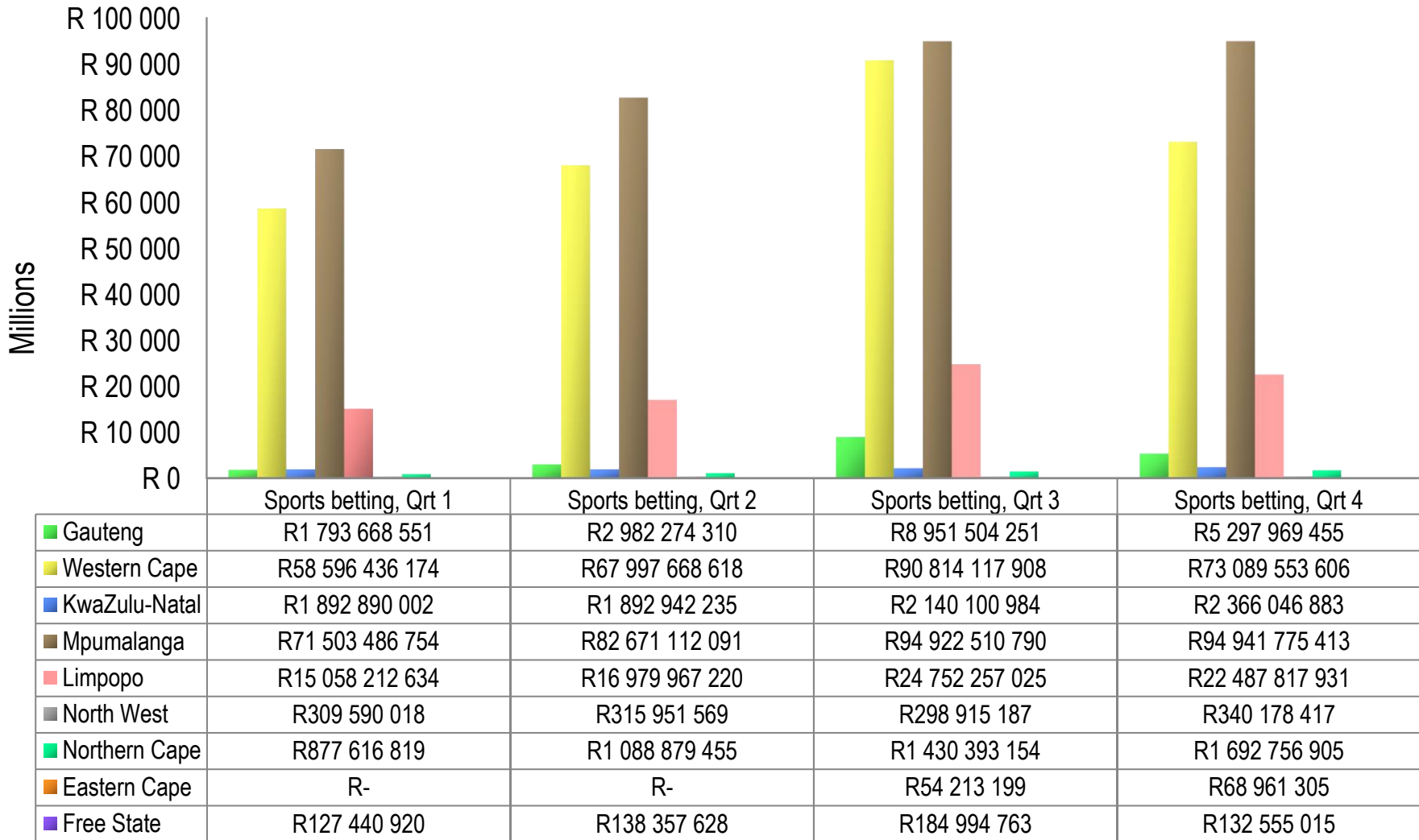


\* Eastern Cape Q1&2 Statistics includes sports betting

# Quarterly betting turnover – FY2023/24

## Betting on sport and other contingencies

The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



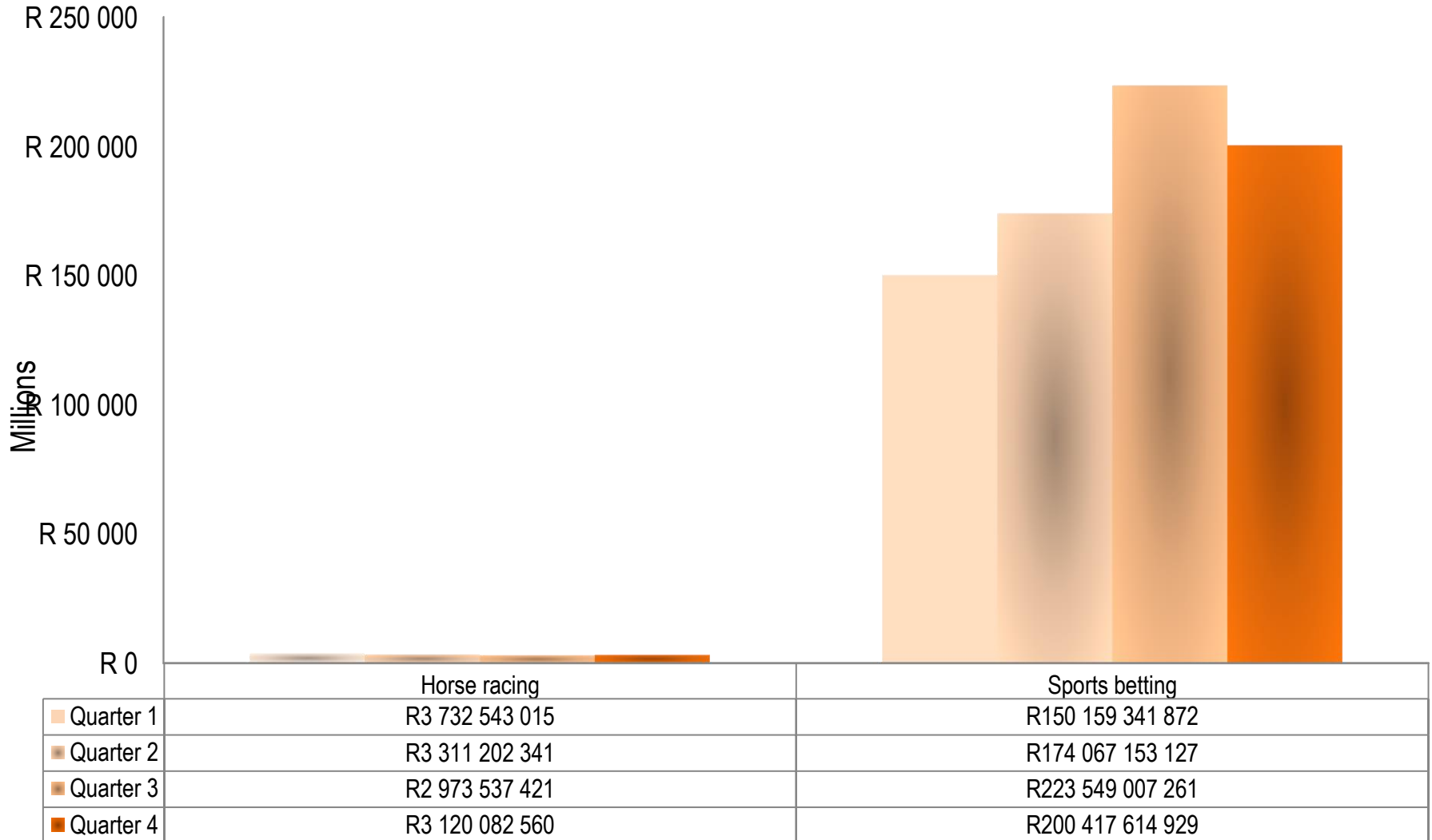
\* Eastern Cape Q1&2 Statistics for sports betting is included in the horse racing statistics



# Quarterly betting turnover – FY2023/24

## Horse racing v sport and other contingencies

The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion

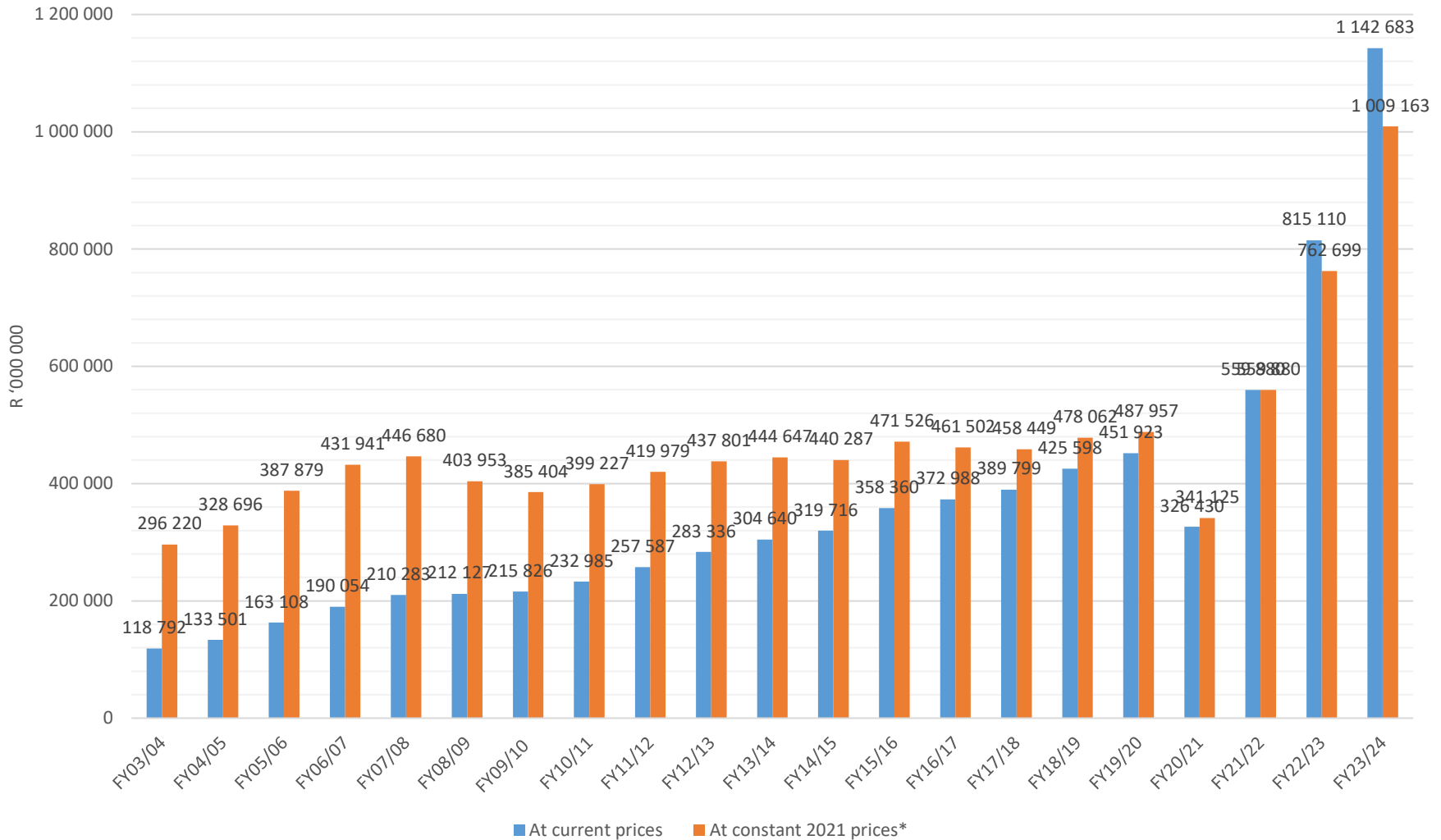


\* Eastern Cape: Statistics for sports betting is included in the horse racing statistics



# Trend in turnover– FY2003/04 to FY2023/24

The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion

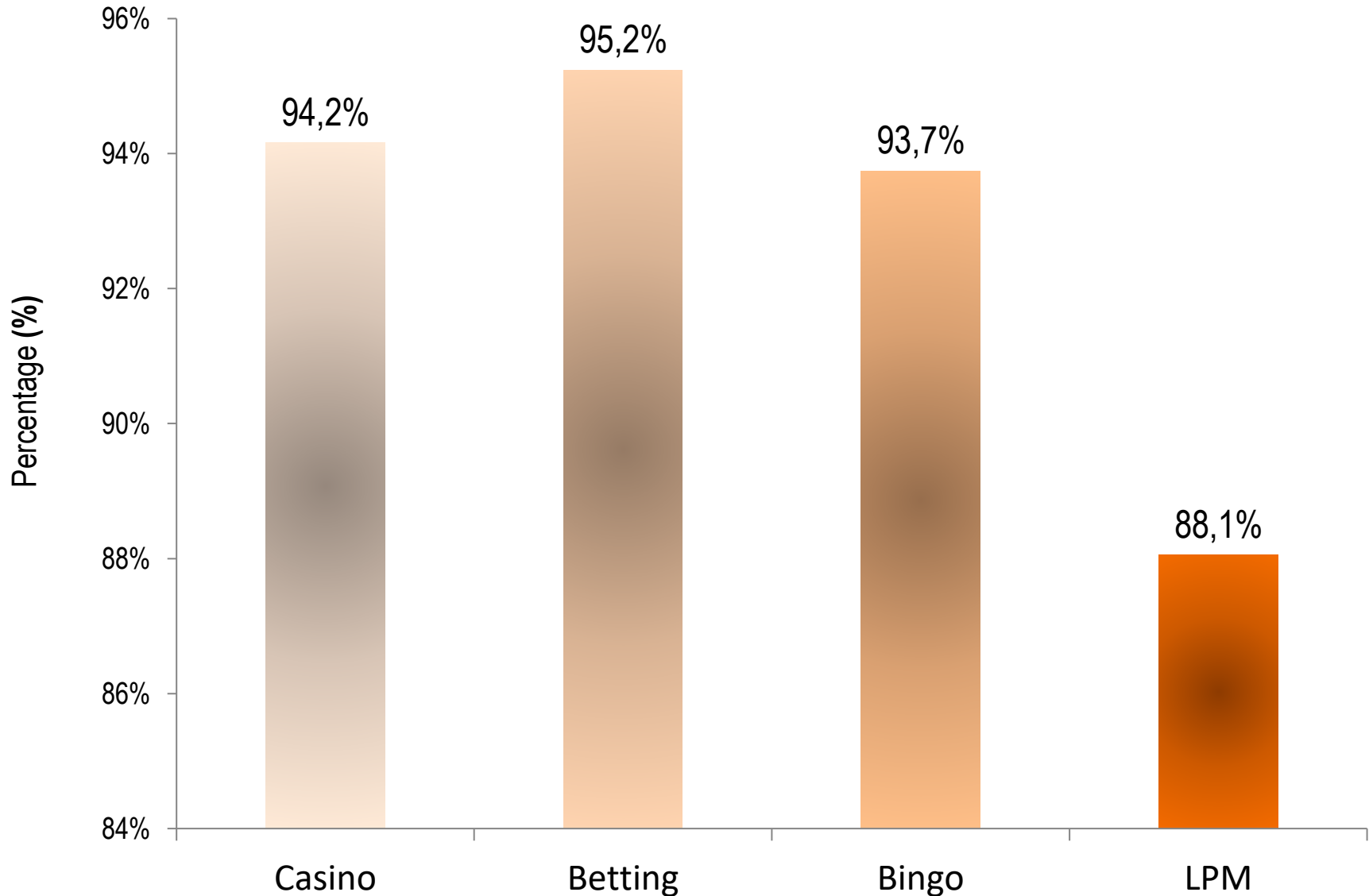


# Summary: Turnover

- ❑ A total amount of R1.14 trillion was wagered in FY2023/24. This is a 40.2% increase from the previous year's turnover of R814.0 billion.
- ❑ The betting sector generated more than two-thirds of industry turnover at 66.6%. Casinos accounted for 26.0% while LPMs and bingo made up 4.7% and 2.6% of the market respectively.
- ❑ Mpumalanga and the Western Cape were the dominant provinces, generating roughly equal shares of turnover at 31.4% and 30.9% respectively.

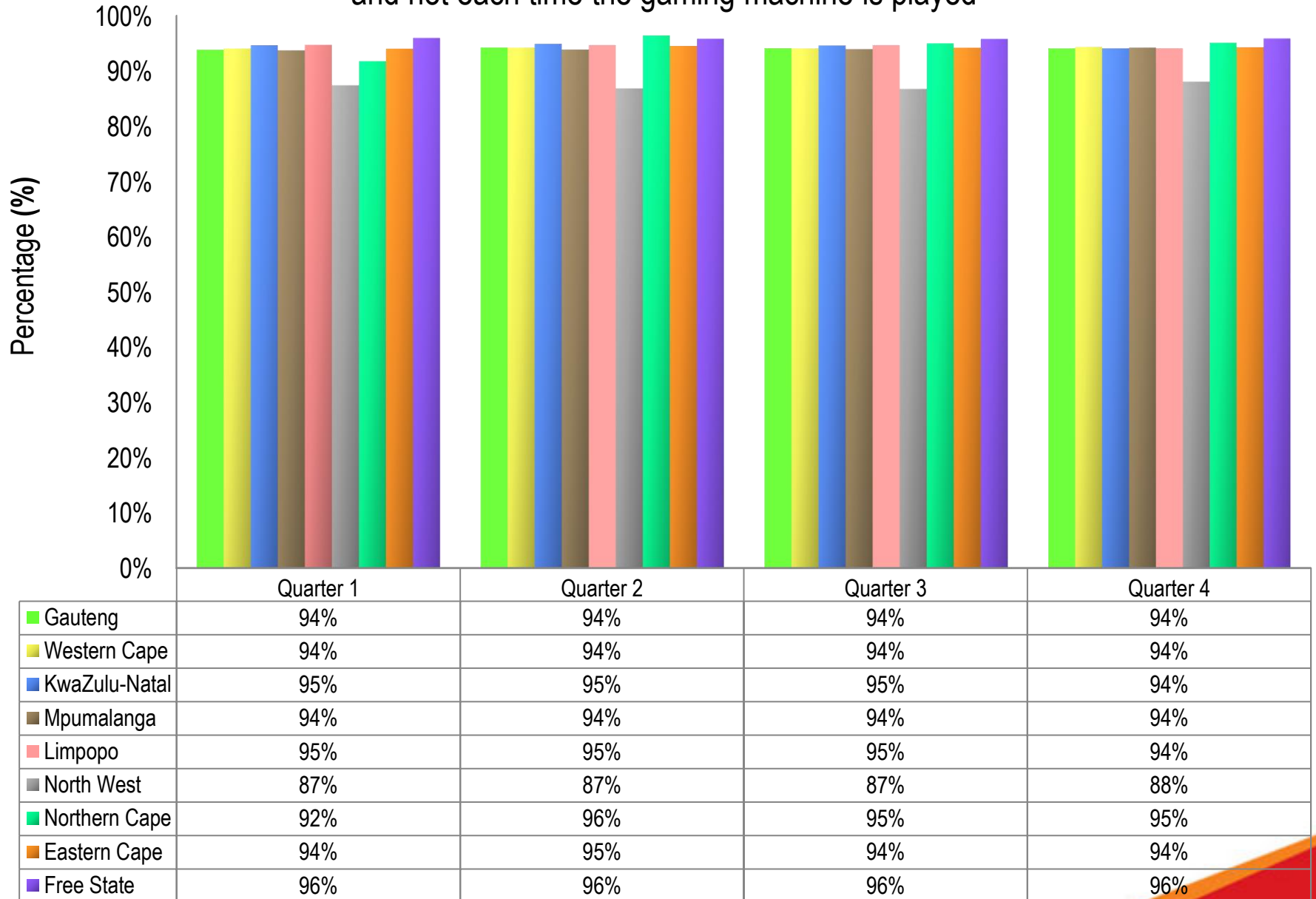
# Average RTP % per gambling mode – FY2023/24

Return to Player is an average achieved over a significant number of game plays\* and not each time the gaming machine is played



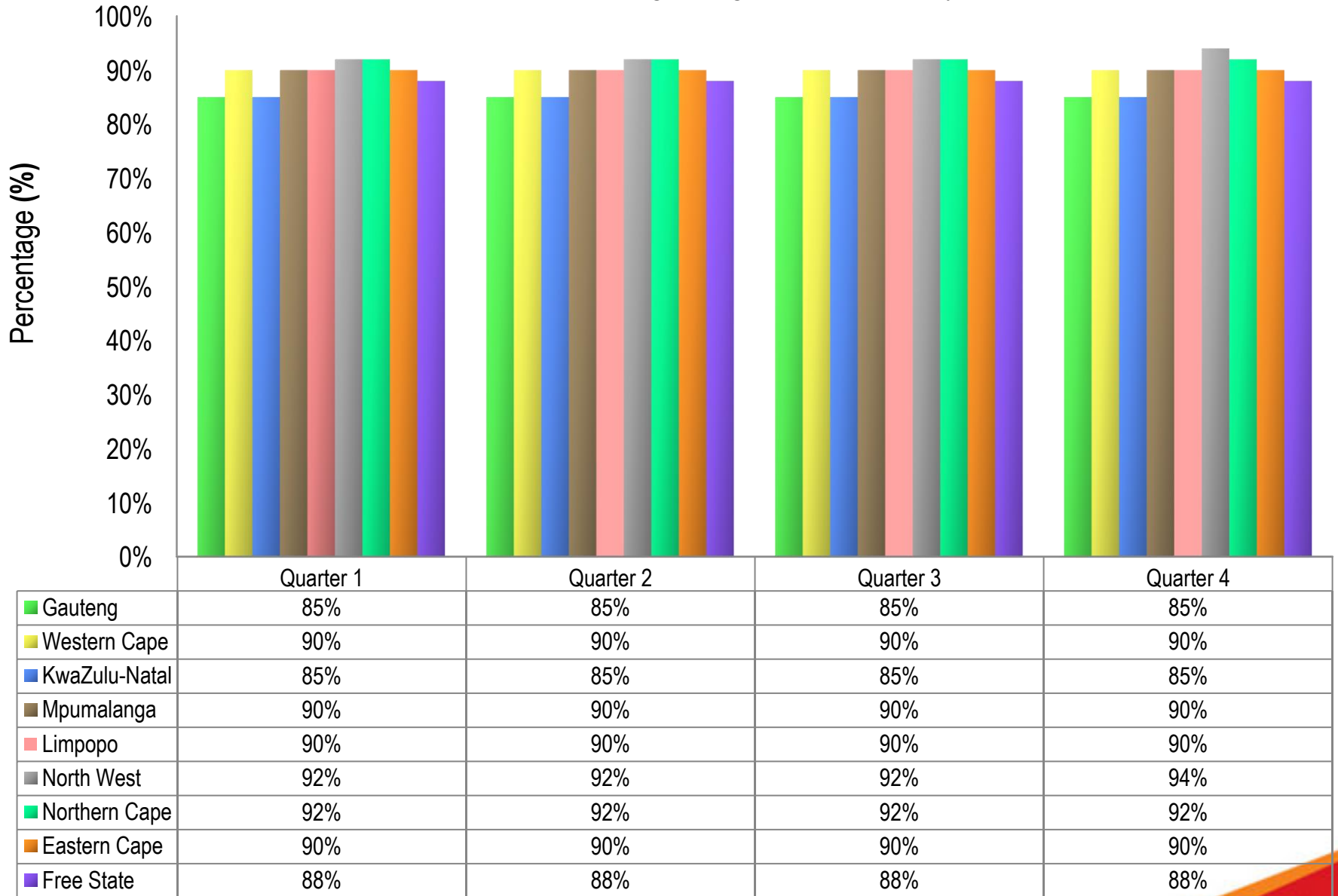
# Quarterly casino RTP % - FY2023/24

Return to Player is an average achieved over a significant number of game plays\*  
and not each time the gaming machine is played



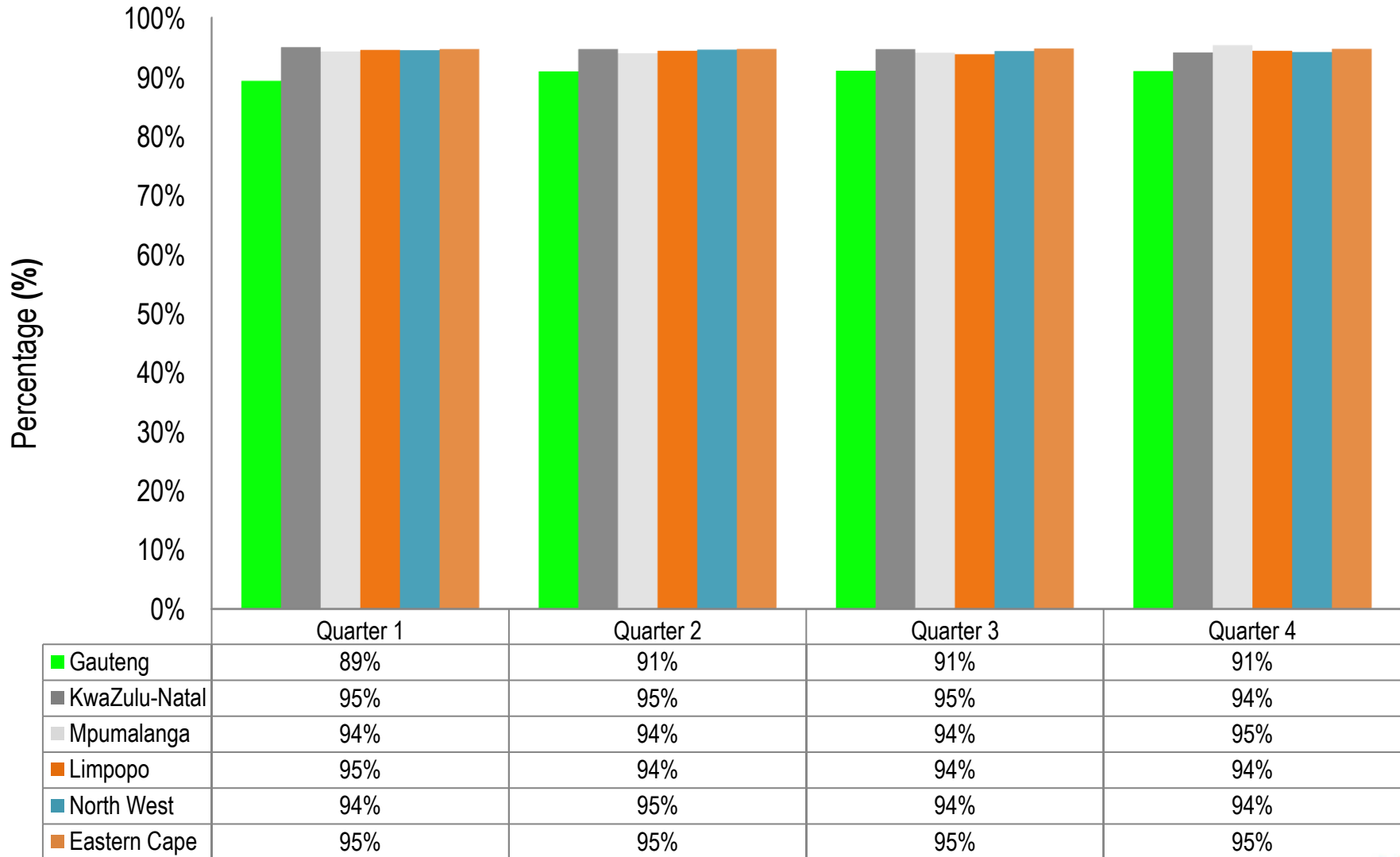
# Quarterly LPM RTP % - FY2023/24

Return to Player is an average achieved over a significant number of game plays\*  
and not each time the gaming machine is played



# Quarterly bingo RTP % - FY2023/24\*

Return to Player is an average achieved over a significant number of game plays\*  
and not each time the gaming machine is played

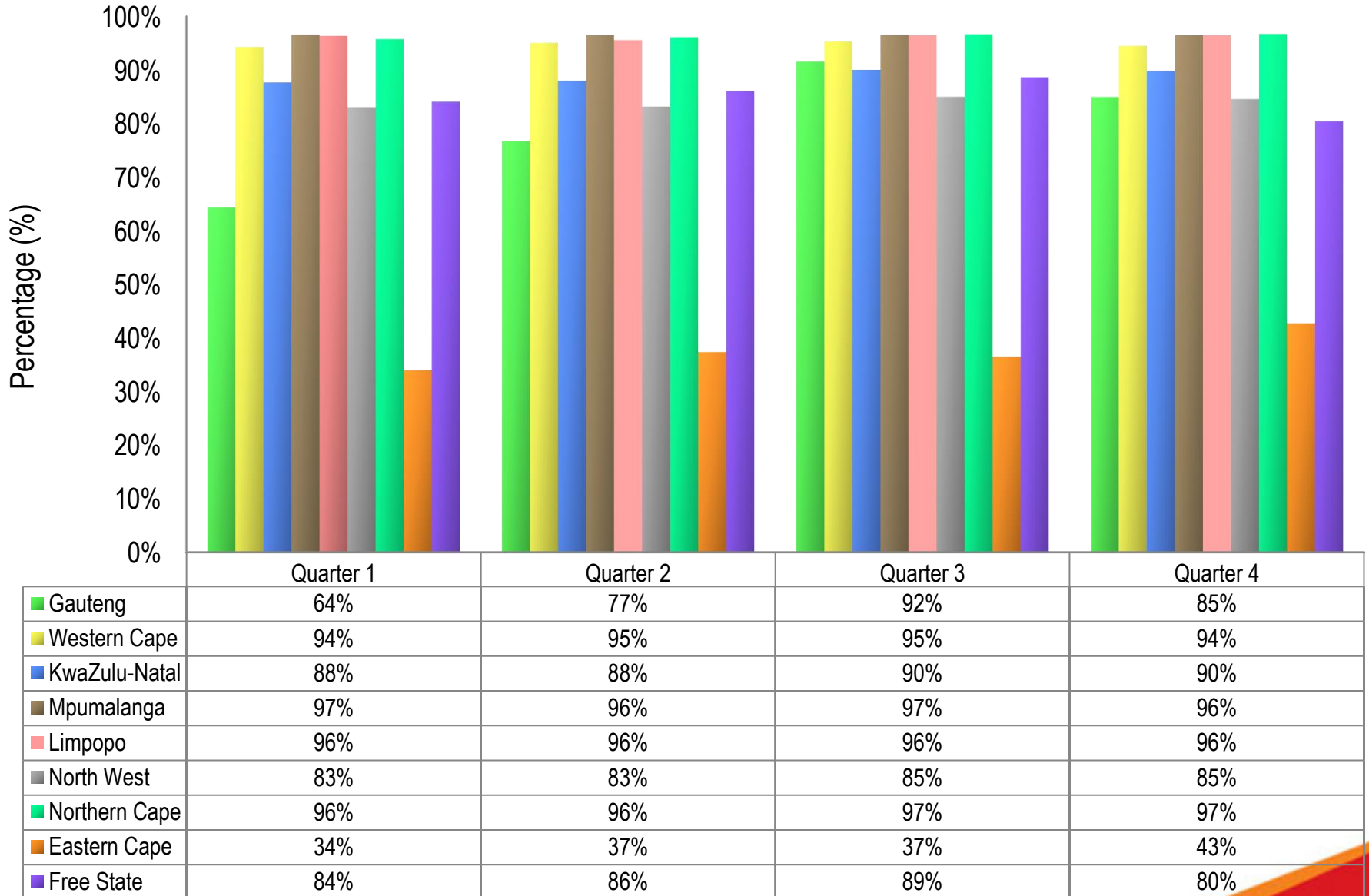


\* Bingo offered for play in Gauteng, Mpumalanga, Limpopo, North West, Eastern Cape and KwaZulu-Natal only



# Quarterly betting RTP % - FY2023/24

Return to Player is an average achieved over a significant number of game plays\*  
and not each time the gaming machine is played



# Conclusion

- ▶ The gambling industry grew by 25.7% between FY2022/23 and FY2023/24, however this growth was unbalanced between the modes of gambling. Growth is now entirely driven by betting on sport and other contingencies.
- ▶ Apart from its high growth figures, the betting segment also expanded its market share to make up 60.5% of gross gambling revenue (GGR). Casinos shrank to 29.3%, while LPMs formed 7.0% and bingo 3.2% of GGR. The make-up of the gambling industry shifted in FY2020/21 when casinos lost their dominance and has continued to see the betting segment gain momentum.
- ▶ What the low-growth modes have in common is that they are all land-based forms of gambling. Betting is available both in retail outlets and online, however our conservative estimates show that over 80% of betting revenue emanates from online sources.

Contact details:

National Gambling Board

Direct switchboard: 0100033475

Website: [www.ngb.org.za](http://www.ngb.org.za)

E-mail: [info@ngb.org.za](mailto:info@ngb.org.za)

Address: 1085 Francis Baard St, Hatfield, Pretoria, 0028



National Gambling Board

*South Africa*

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a member of **the dtic** group