



National Gambling Board  
South Africa  
a member of the dxi group

# AUDITED

# National Gambling Statistics

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

2015/2016 Financial Year (FY16)

**1 April 2015 – 31 March 2016**

Quarter 1 = 1 April 2015 – 30 June 2015

Quarter 2 = 1 July 2015 – 30 September 2015

Quarter 3 = 1 October 2015 – 31 December 2015

Quarter 4 = 1 January 2016 – 31 March 2016

# Introduction

- The National Gambling Board (NGB) is mandated by the National Gambling Act (NGA), Act no 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 NGB website is updated with a detailed Power Point presentation annually, which is based on audited information representative of that financial year.
- The scope of this report covers information (national gambling statistics) related to the following legalised gambling modes in South Africa (as regulated by the NGB) for quarters 1, 2, 3 & 4 of the Financial Year (FY) 2016:
  - Casinos (tables and slots);
  - Betting on horse racing and sport (offered by bookmakers and totalisators, on and off course);
  - Limited Payout Machines (LPMs); and
  - Bingo (traditional and Electronic Bingo Terminals (EBTs)).

# Introduction

- Quarterly statistics are sourced from Provincial Licensing Authorities (PLAs). FY16 information in this report is based on audited data.
- The board cannot be held responsible for the correctness of information (refer to the disclaimer).
- The information in this report is applicable to the period of 1 April 2015 to 31 March 2016 (referred to as FY2016), whereas quarters are representative of the following specific periods:
  - Quarter 1: 1 April 2015 – 30 June 2015;
  - Quarter 2: 1 July 2015 – 30 September 2015;
  - Quarter 3: 1 October 2015 – 31 December 2015; and
  - Quarter 4: 1 January 2016 – 31 March 2016.
- The purpose of this report is to provide an overview regarding the status and performance of the South African gambling sector (excluding the National Lottery) in terms of national gambling statistics pertaining to FY16, as well as trends over time.

# 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 audited data received from all the Provincial Licensing Authorities quarterly:

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

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# EXECUTIVE SUMMARY

GGR generated in the casino industry increased by 4.5% from FY14 to FY15 and by 7.4% from FY15 to FY16. Two new casinos became operational during FY15 (Northern Cape) and FY16 (Limpopo). During FY16 casinos accounted for the highest GGR generated, being 70.5% as compared to other gambling modes. Compared to all other provinces, Gauteng at a 40.0% share, accounted for the highest amount of GGR generated during FY16.

GGR generated in the betting on horse racing and sport sector represents 16.9% of the total amount of GGR generated during FY16. GGR generated in the betting industry increased by 22.2% from FY14 to FY15, and by 28.5% from FY15 to FY16. This is mainly as a result of major increases in the generation of GGR by bookmakers offering betting on sport. However, during FY2016 and in monetary value, the highest amounts of taxes/levies were collected from bookmakers offering betting on horse racing. These trends continued in FY16.

GGR generated in the LPM sector during FY16 represents 9.0% of the total amount of GGR generated by all licensed gambling modes. Significant increases in GGR generated have been recorded in the LPM industry - an increase of 19.6% from FY14 to FY15, and by 13.7% from FY15 to FY16.

GGR generated in the bingo sector during FY16 represents 3.6% of the total amount of GGR generated by all licensed gambling modes. Although significant increases in GGR generated were recorded in the bingo industry - an increase of 67.7% from FY13 to FY14 and by 52.5% from FY14 to FY15, a decrease by 16.1% was recorded from FY15 to FY16. This is mainly as a result of decreases in the generation of GGR in the bingo industry in Gauteng.

# **EXECUTIVE SUMMARY**

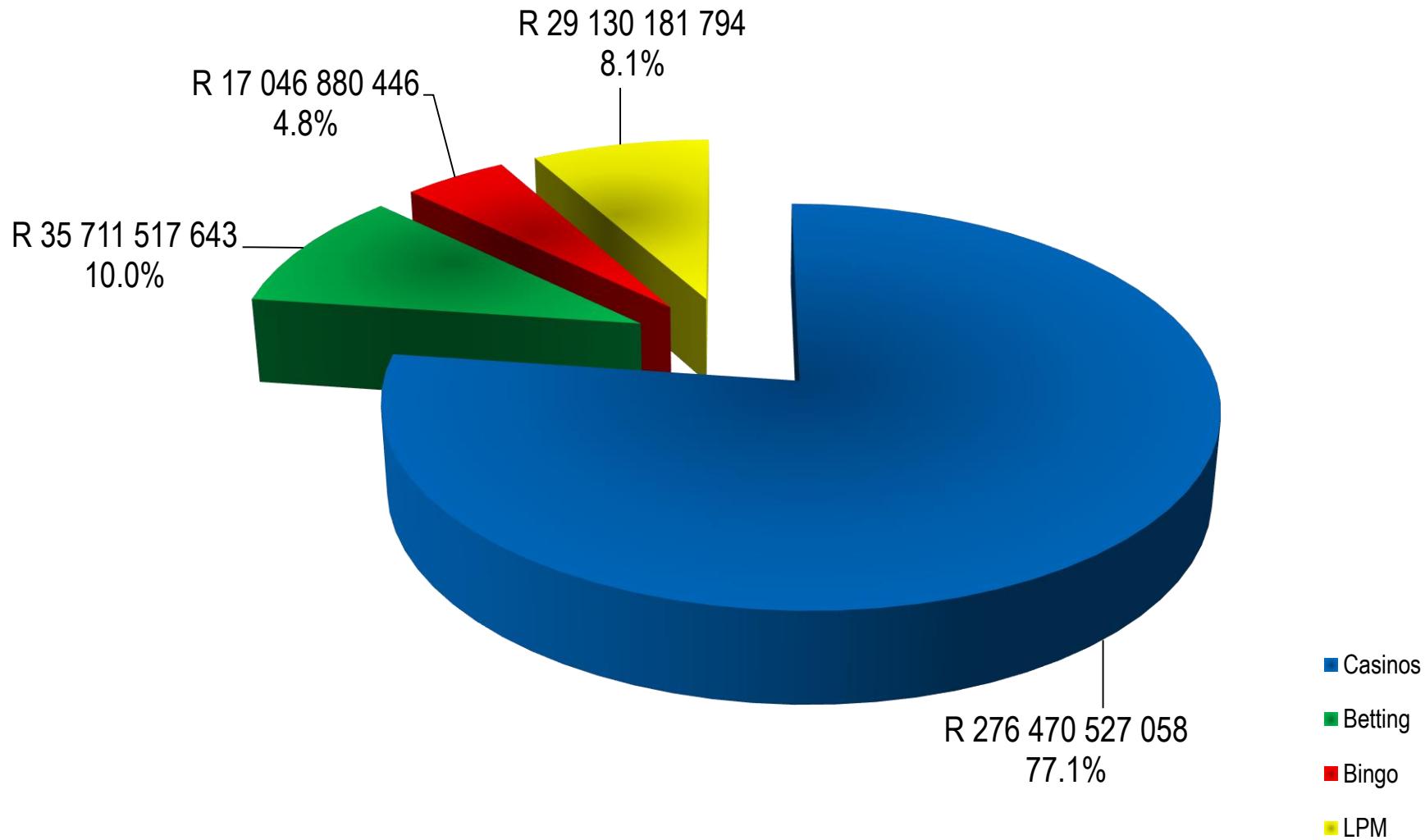
(continued ....)

The generation of GGR increased by 4.3% from R20,9 billion in FY13 to R 21,8 billion in FY14, by 9.6% to R 23,9 billion in FY15 and by 9,9% to R26.3 billion in FY16. A total amount of R 26 265 474 796 in GGR was generated during FY16. During FY16 casinos accounted for the highest GGR generated, being 70.5% as compared to other gambling modes. Compared to all other provinces, Gauteng at a 40.0% share, accounted for the highest amount of GGR generated.

The collection of taxes/levies increased by 6.6% from R2,1 billion in FY13 to R2,2 billion in FY14, by 10.7% to R2,5 billion in FY15, and by 11.9% to R2,8 billion in FY16. A total amount of R 2 770 743 912 was collected during FY16, Quarters 1, 2, 3 & 4. During FY16 (Quarters 1, 2, 3 & 4), at 71.1%, casinos contributed the highest amount of taxes/levies paid by comparison with other gambling modes. At 36.1% Gauteng accounts for the highest amount of taxes/levies paid compared to all other provinces.

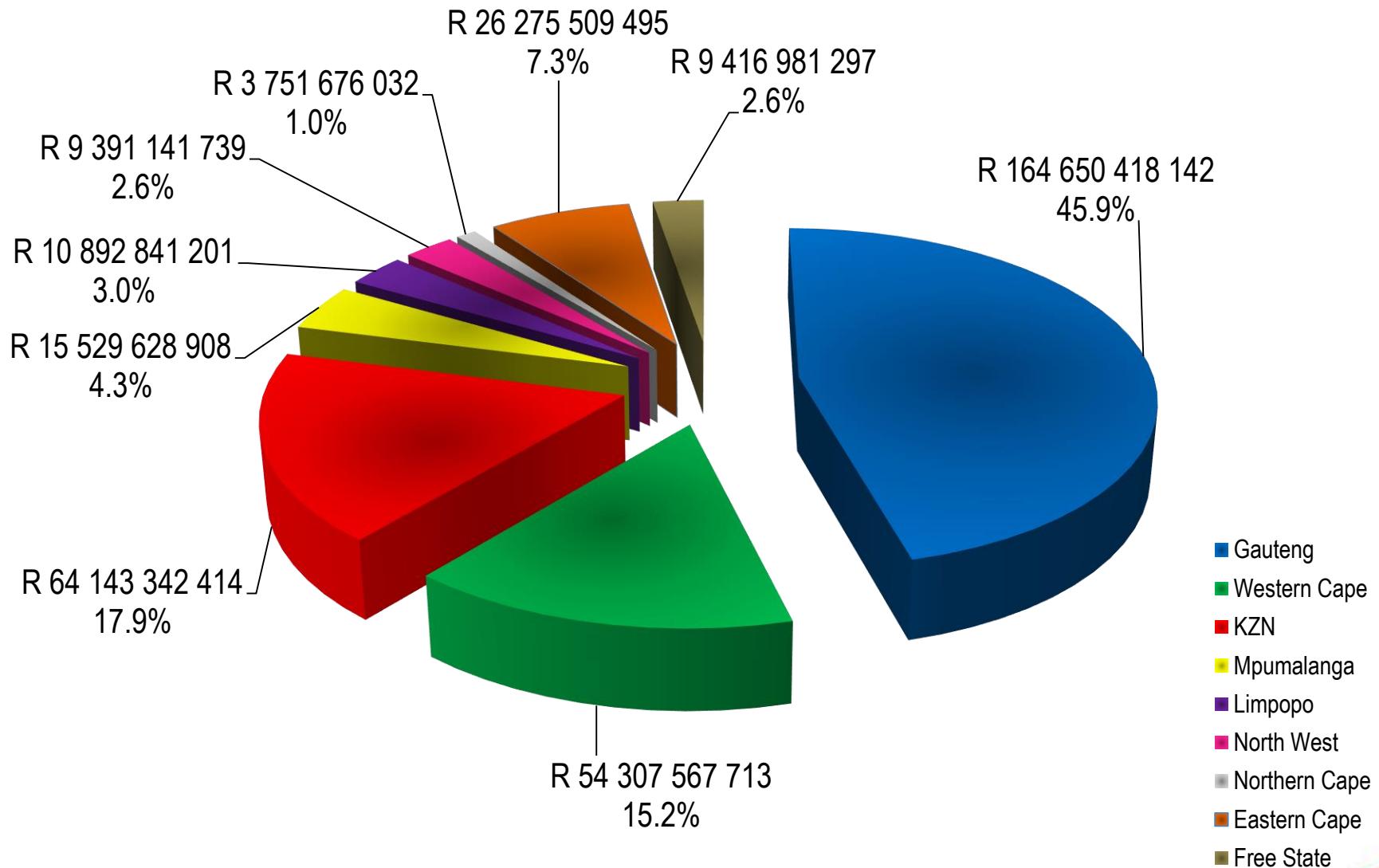
# Turnover per gambling mode – FY2016, Qrt 1, 2, 3 & 4

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



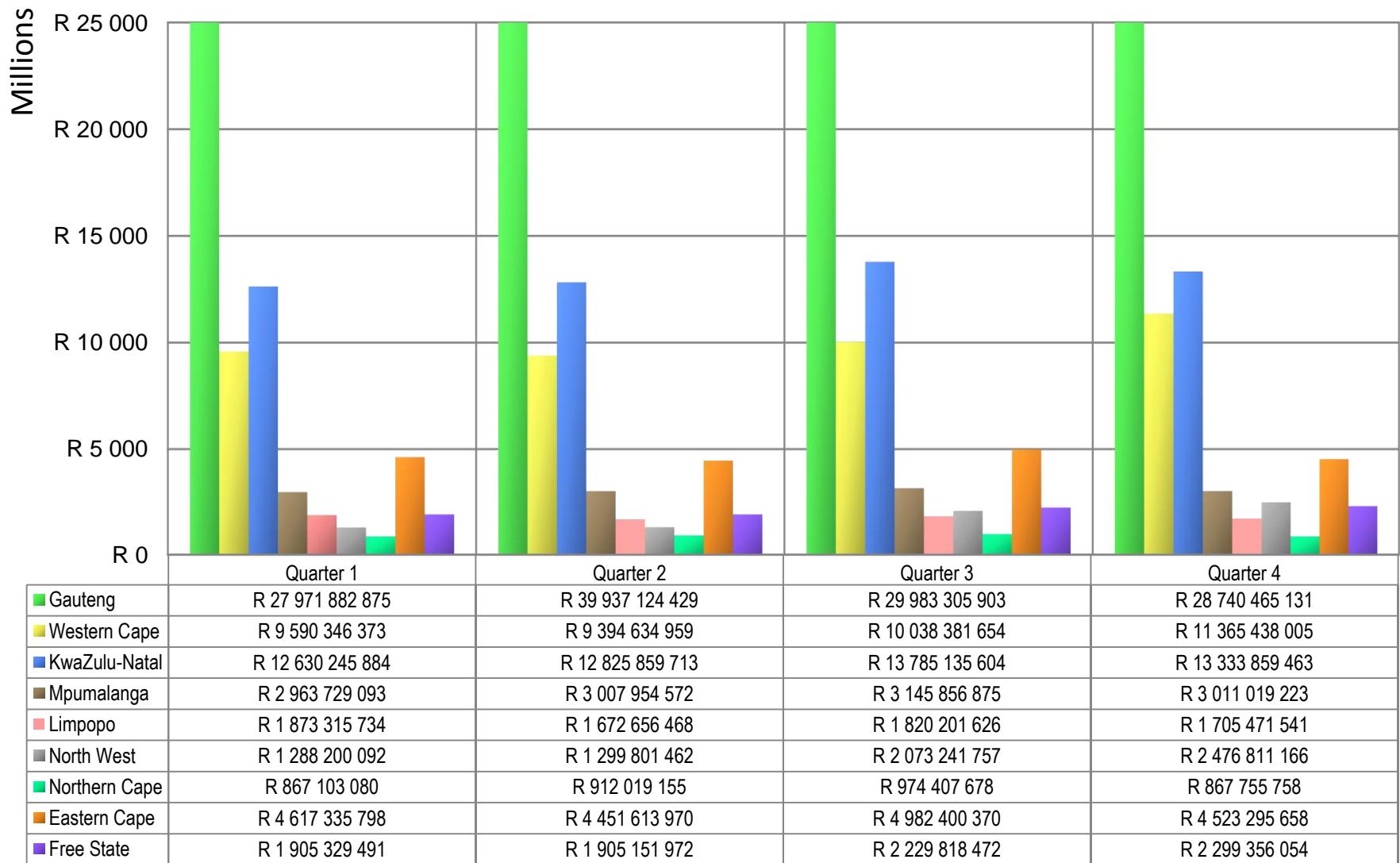
# Turnover per province – FY2016, Qrt 1, 2, 3 & 4

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



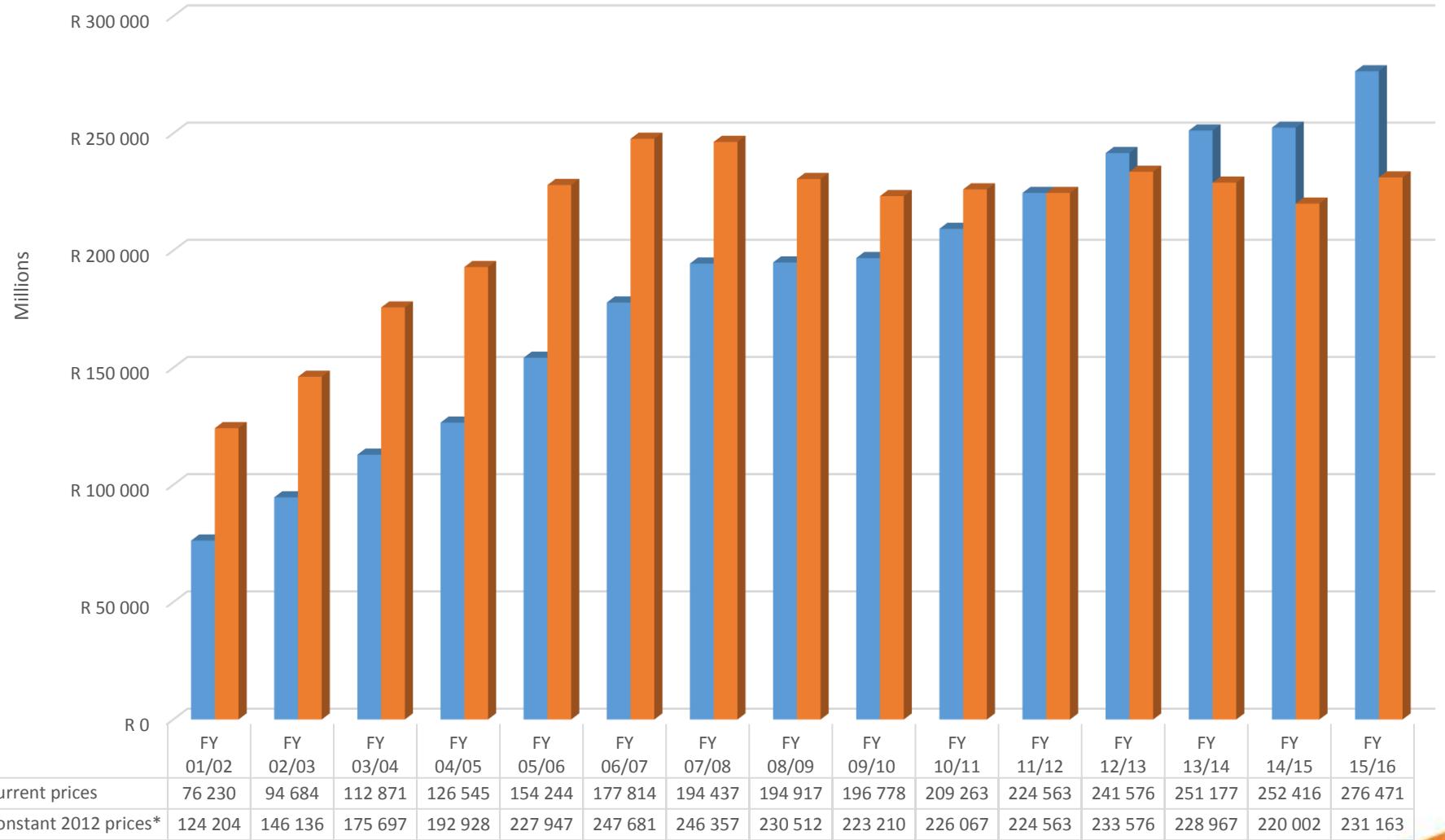
# Quarterly casino turnover - FY2016, Qrt 1, 2, 3 & 4

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



# Trend in turnover casinos – FY2001/02 to FY2015/16

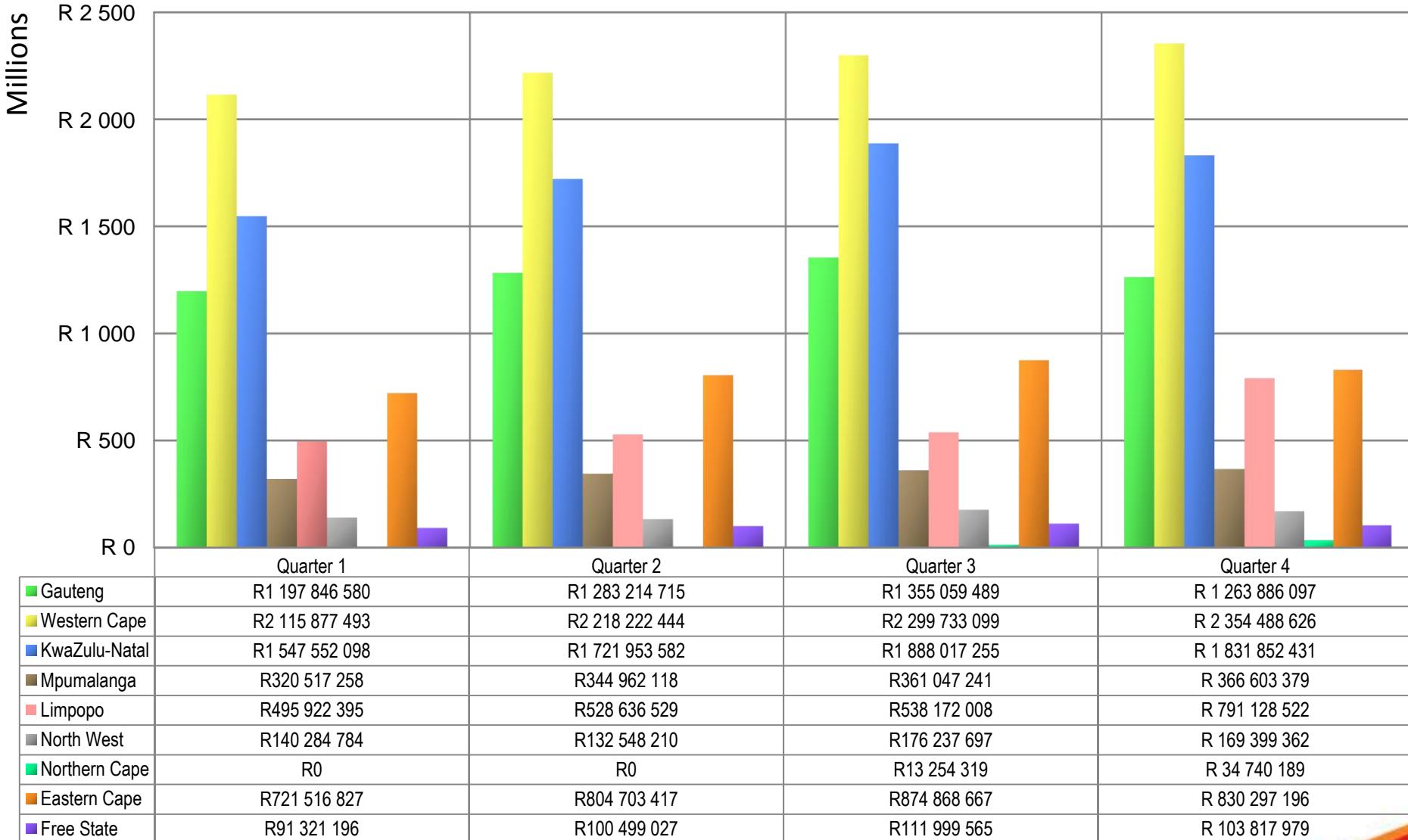
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



2012 constant prices, Reserve Bank

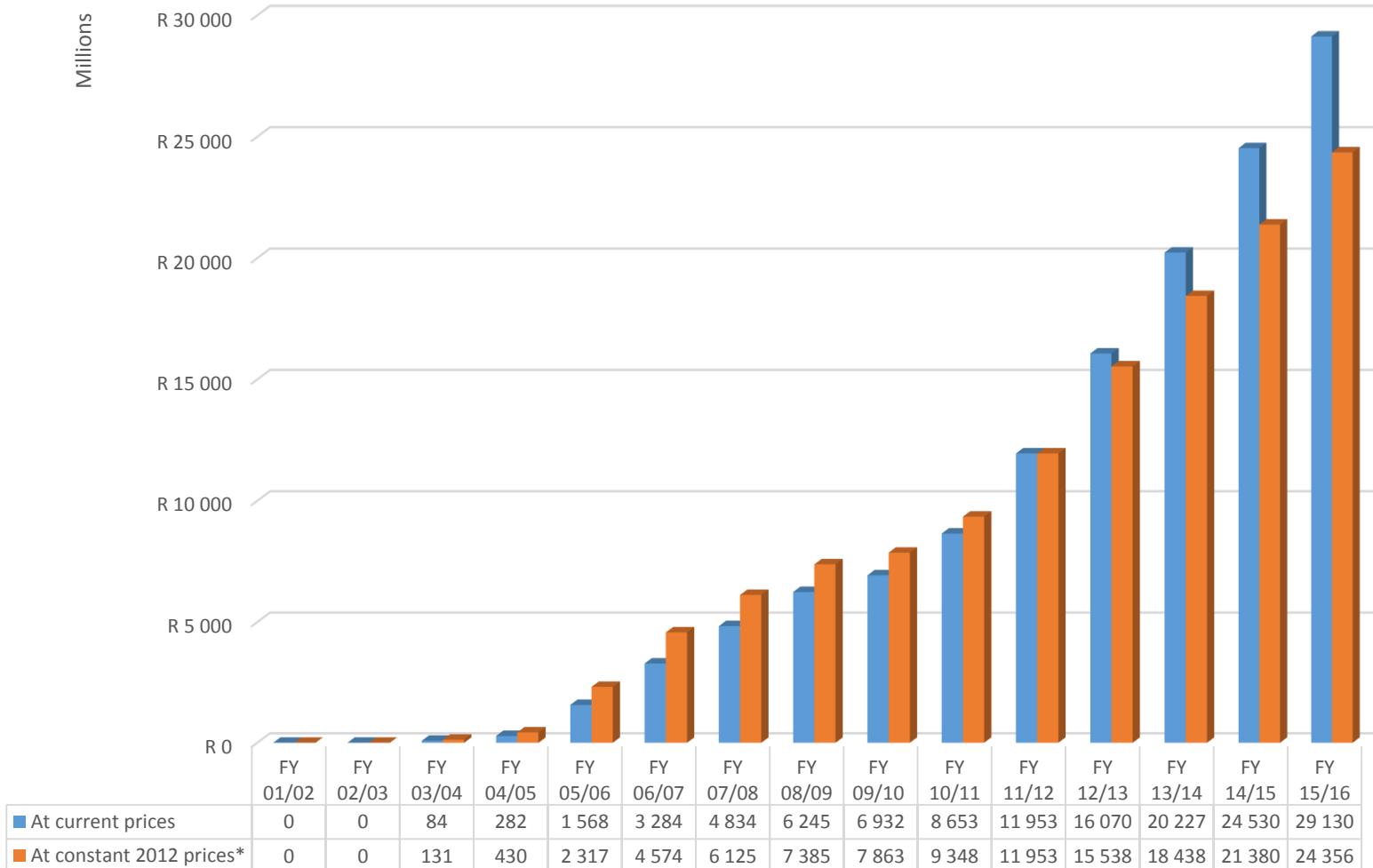
# Quarterly LPM turnover - FY2016, Qrt 1, 2, 3 & 4

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



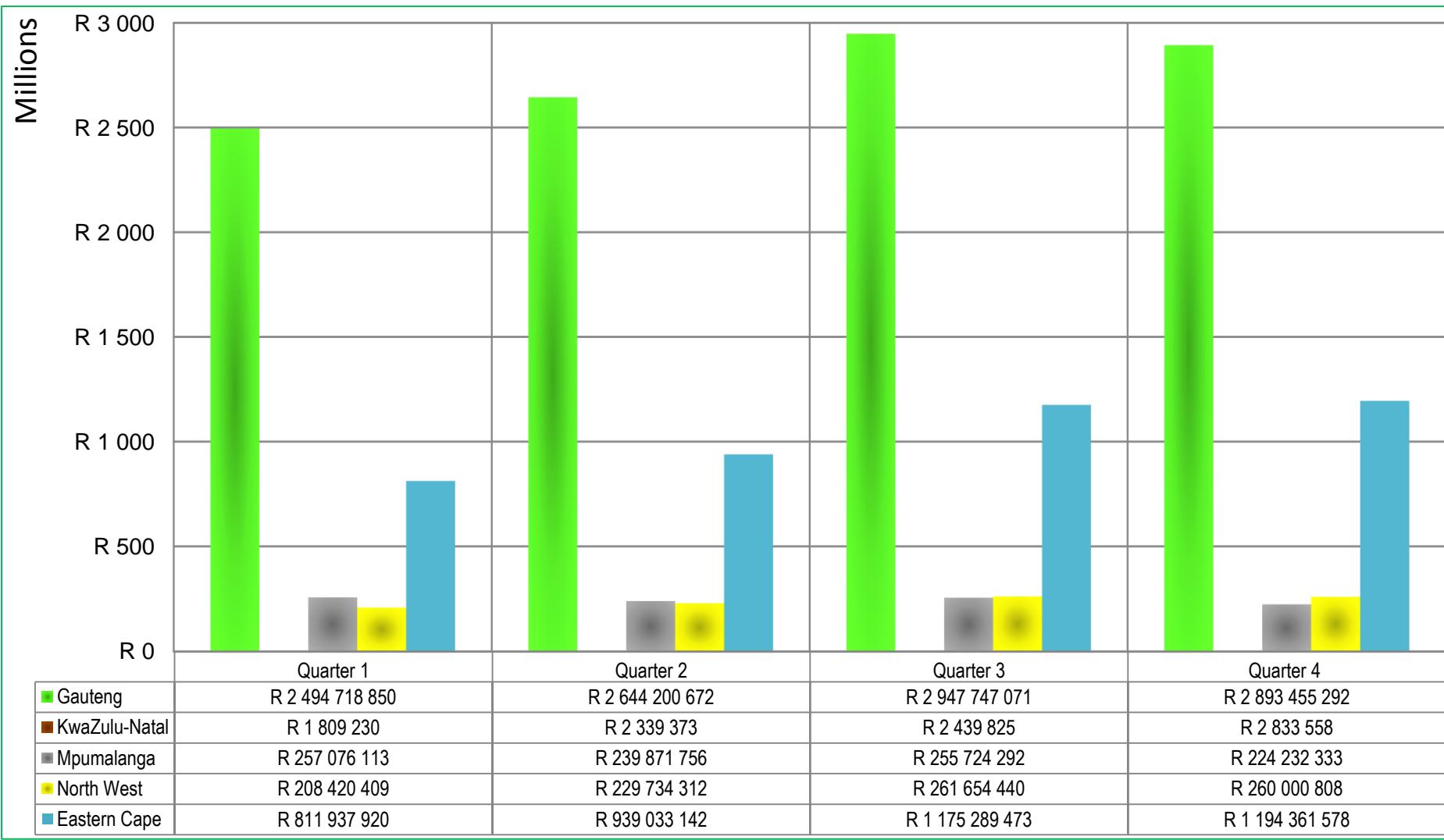
# Trend in turnover LPMs – FY2001/02 to FY2015/16

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



# Quarterly bingo turnover - FY2016, Qrt 1, 2, 3 & 4\*

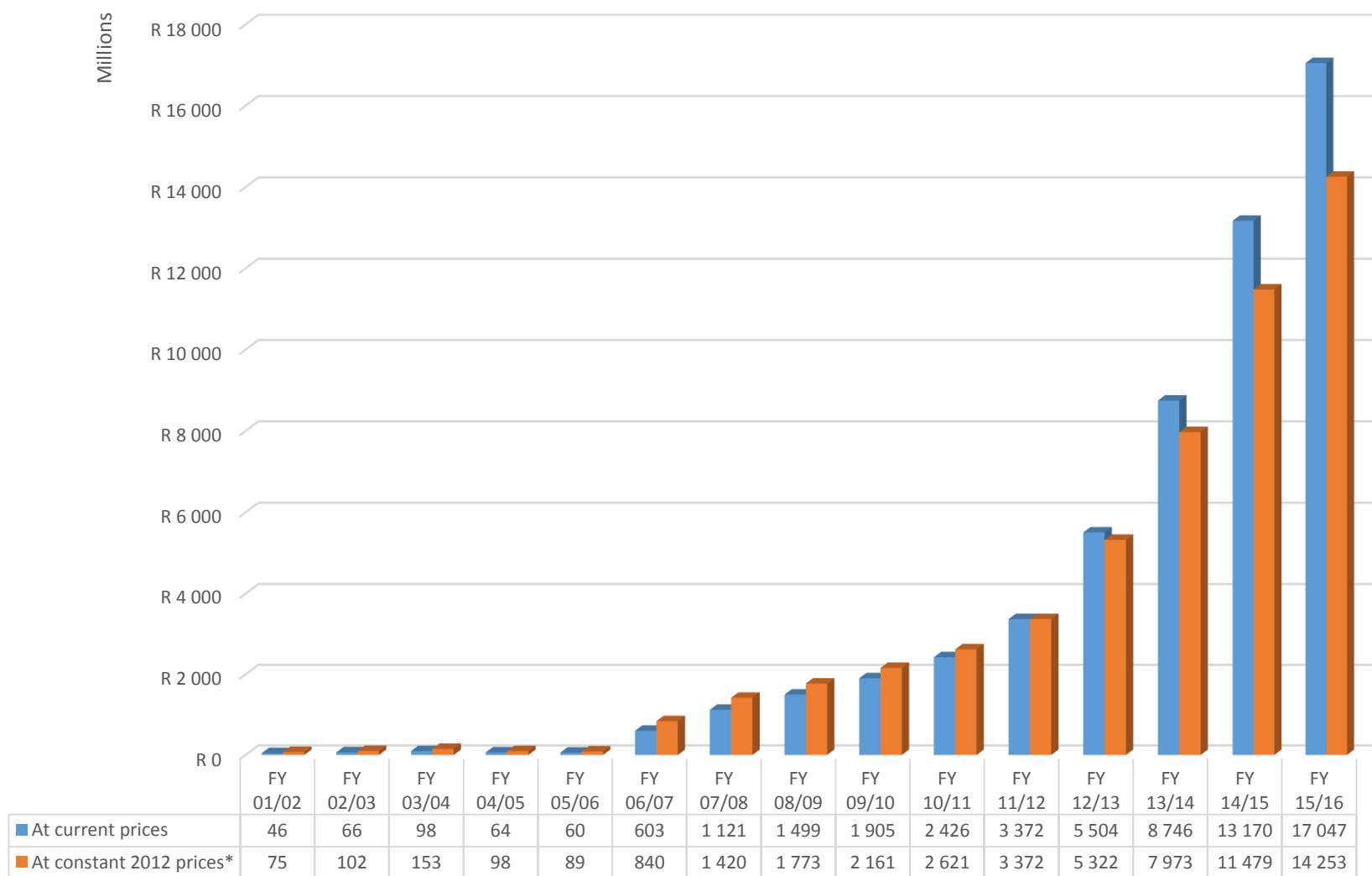
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



- Bingo offered for play in Gauteng, Mpumalanga, North West, KwaZulu-Natal and Eastern Cape only
- Figures for KZN too low to be visible on the graph

# Trend in turnover bingo – FY2001/02 to FY2015/16

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



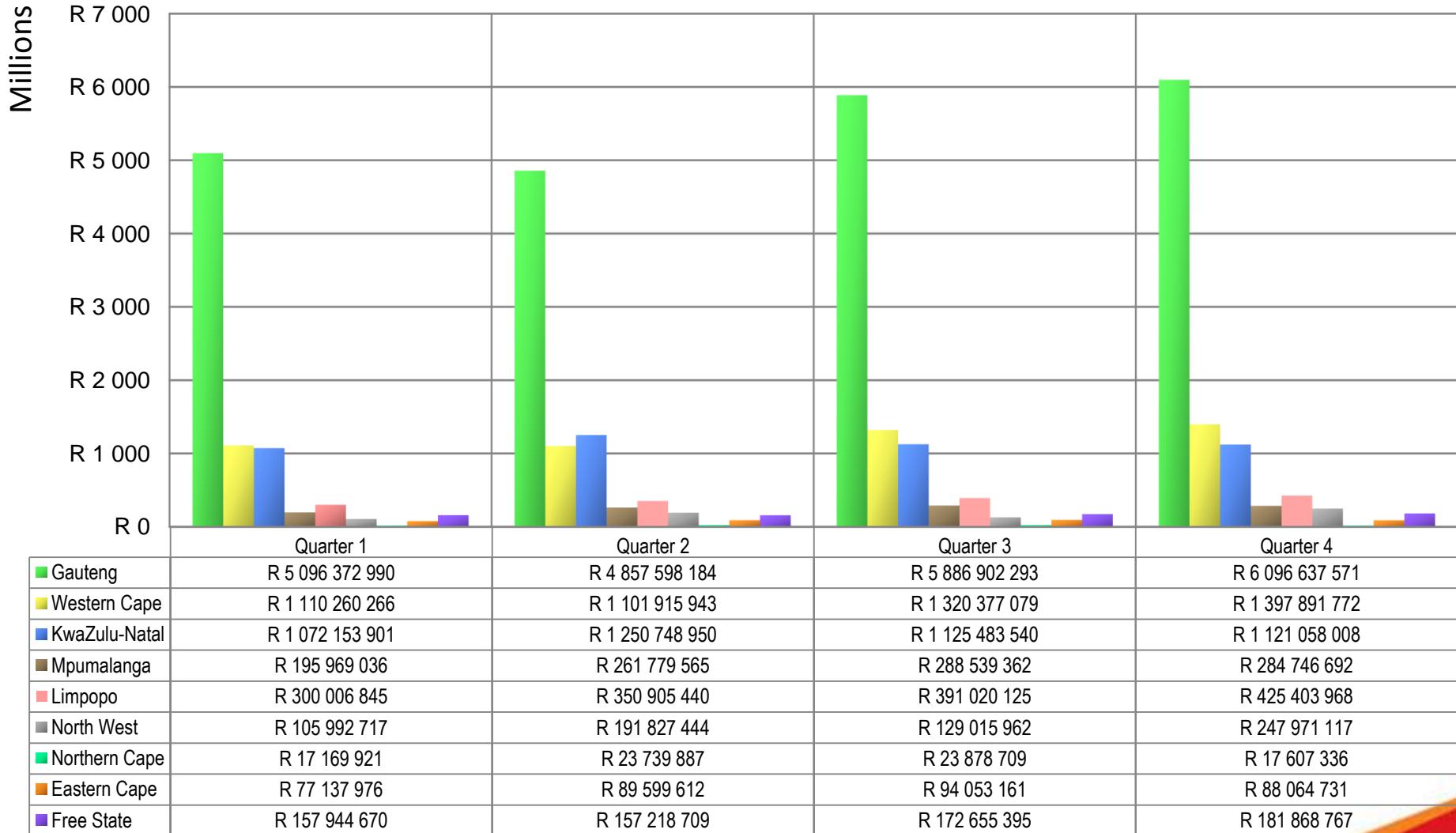
2012 constant prices, Reserve Bank

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

# Quarterly betting turnover – FY2016, Qrt 1, 2, 3 & 4

## Bookmakers & Totalisators

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

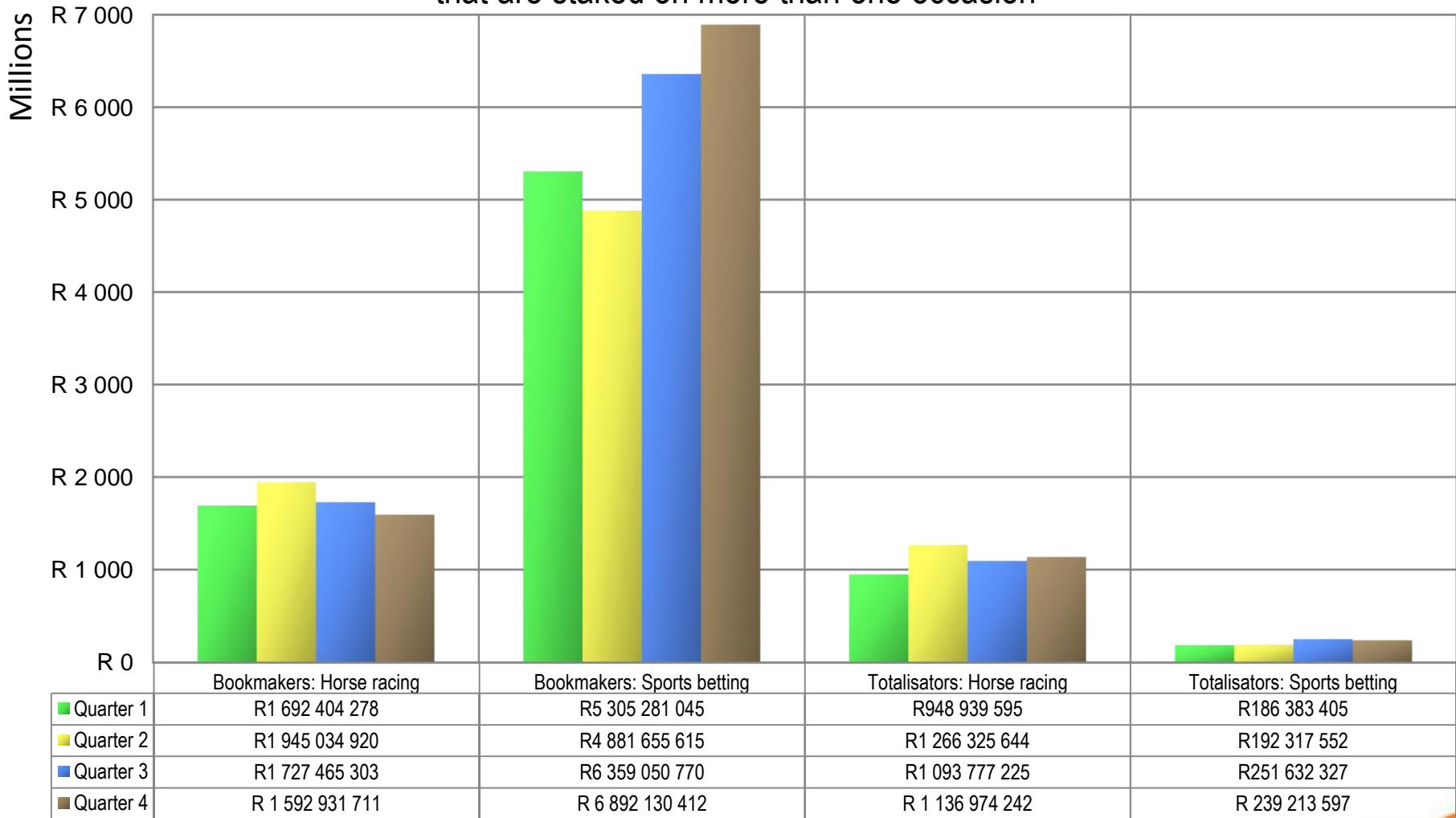


# Quarterly betting turnover – FY2016, Qrt 1, 2, 3 & 4

## Split between Bookmakers & Totalisators

### Betting on horse racing & sport

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

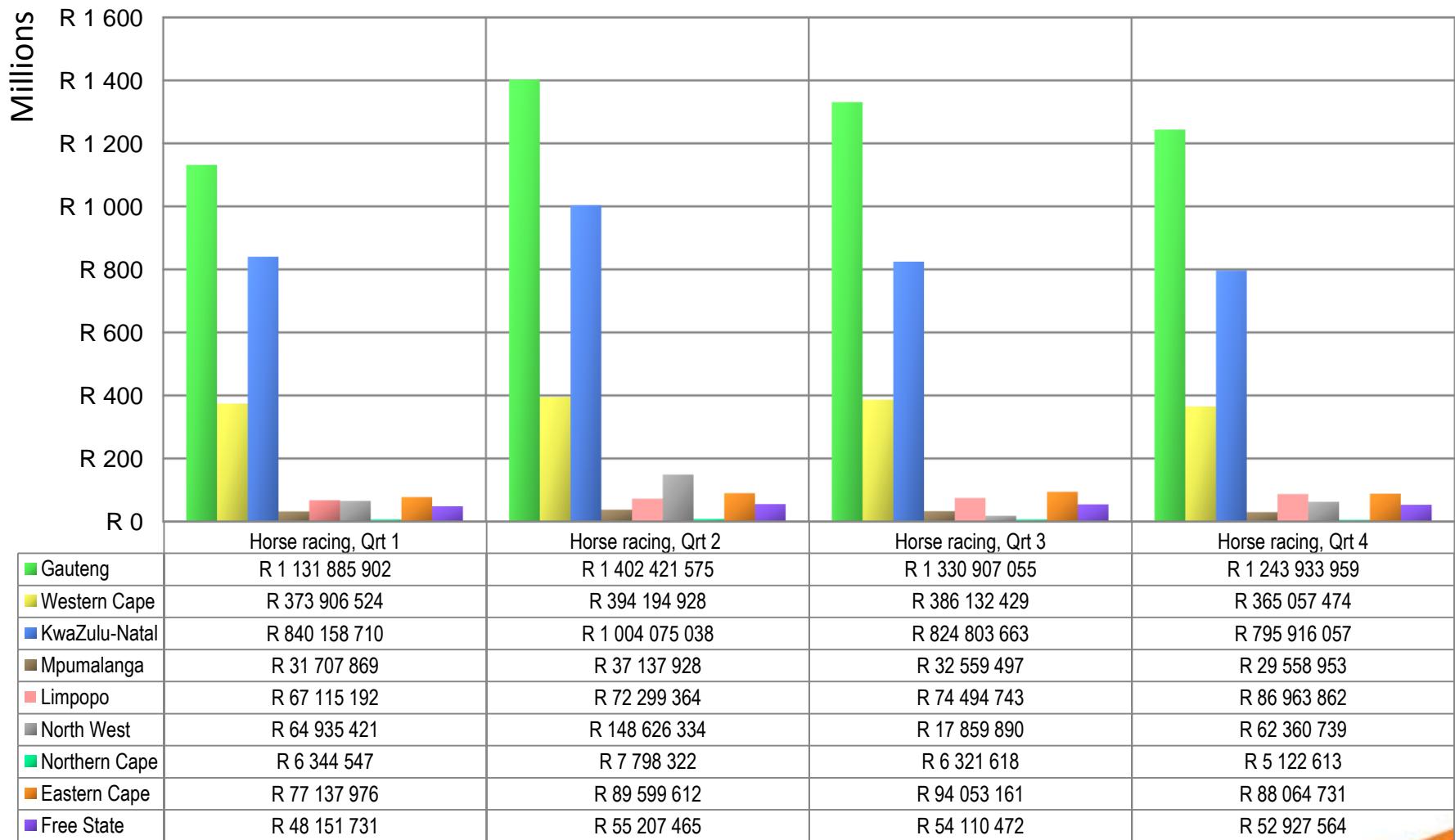


\* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

# Quarterly betting turnover – FY2016, Qrt 1, 2, 3 & 4

## Betting on horse racing\*

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

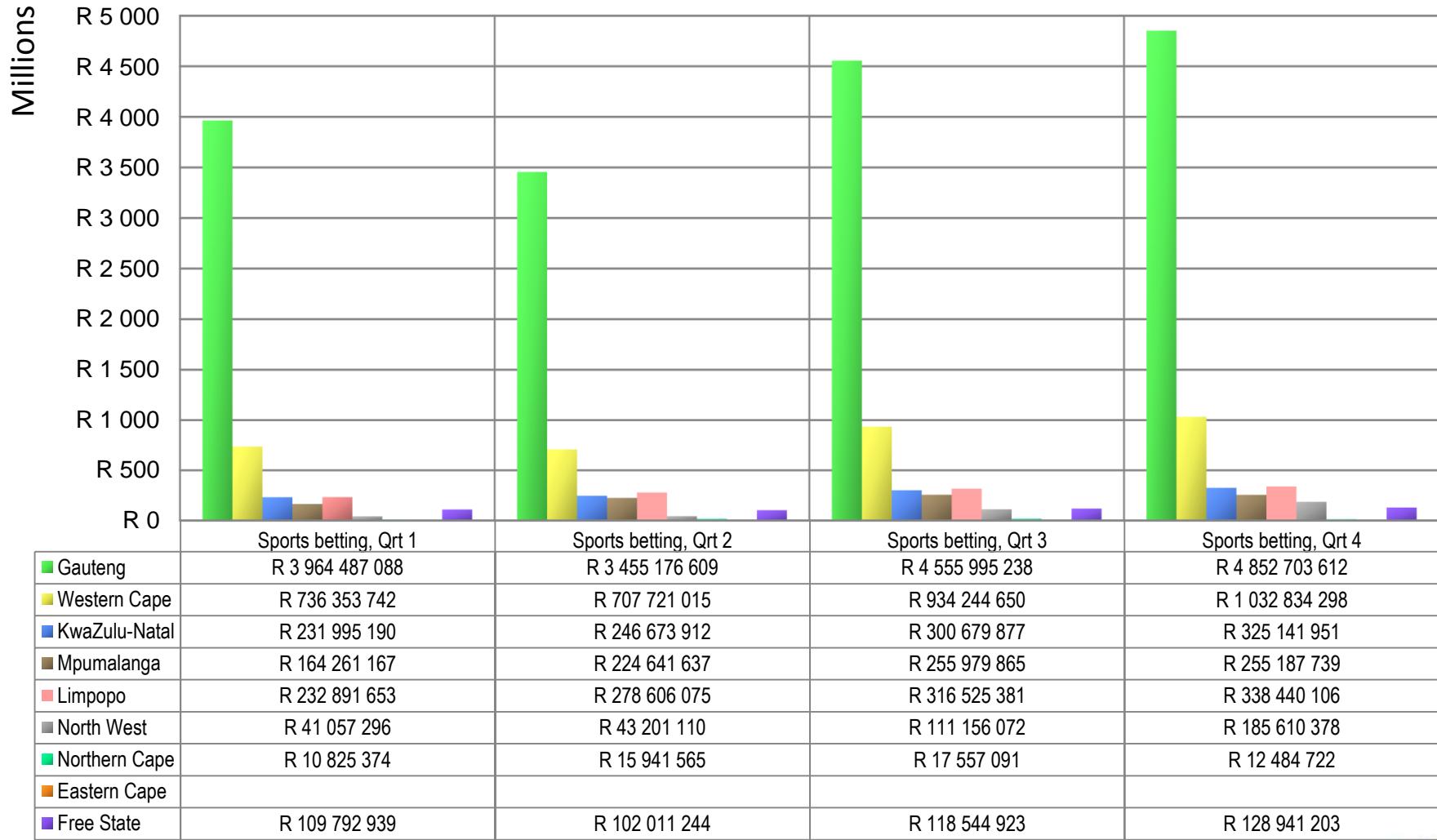


\* Eastern Cape: Statistics includes sports betting

# Quarterly betting turnover – FY2016, Qrt 1, 2, 3 & 4

## Betting on sport\*

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

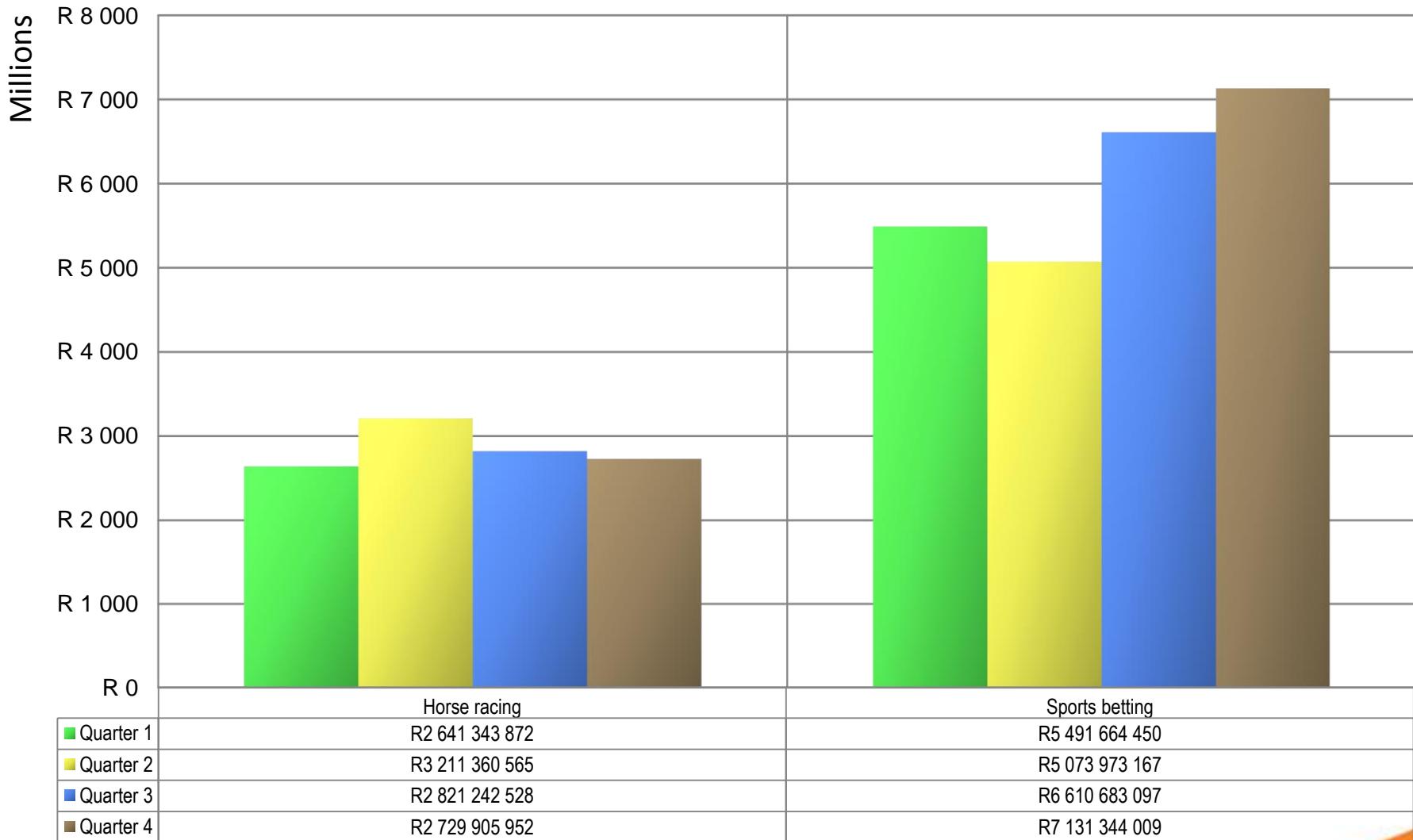


\* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

# Quarterly betting turnover – FY2016, Qrt 1, 2, 3 & 4

## Split between betting on horse racing & sport

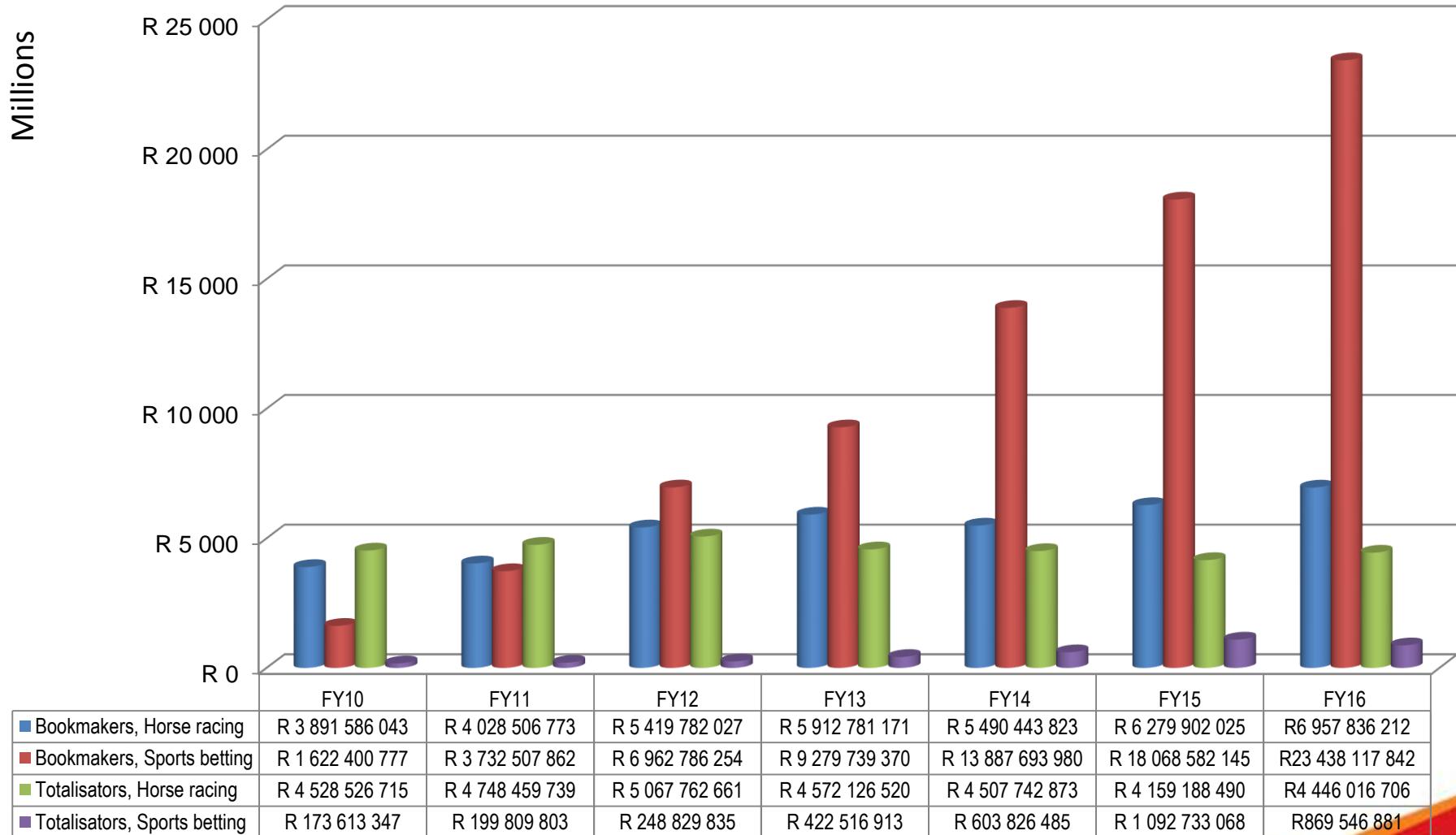
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



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

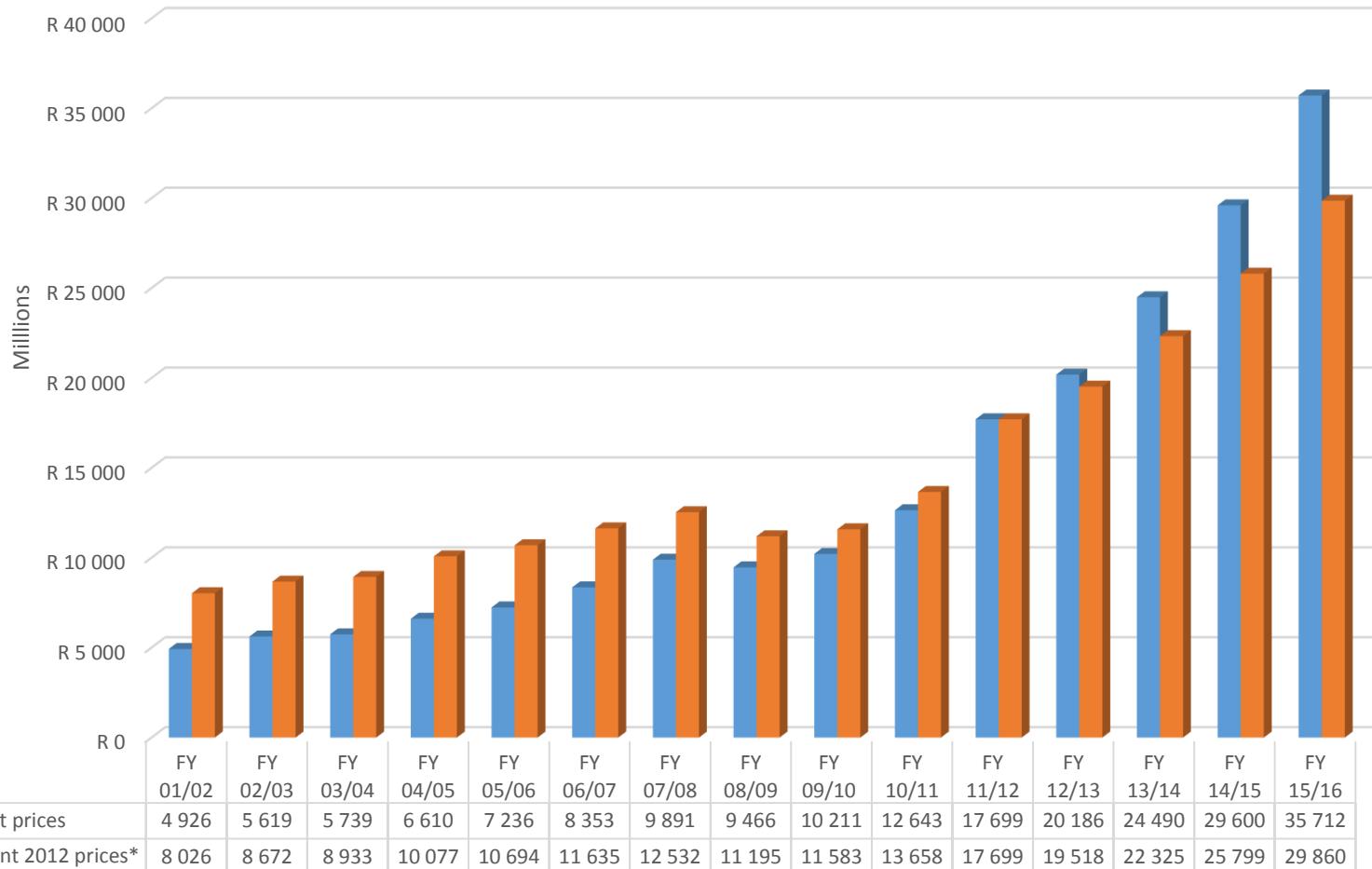
# Trend in turnover, bookmakers & totalisators, FY2010 to FY2016

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



# Trend in turnover, betting – FY2001/02 to FY2015/16

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



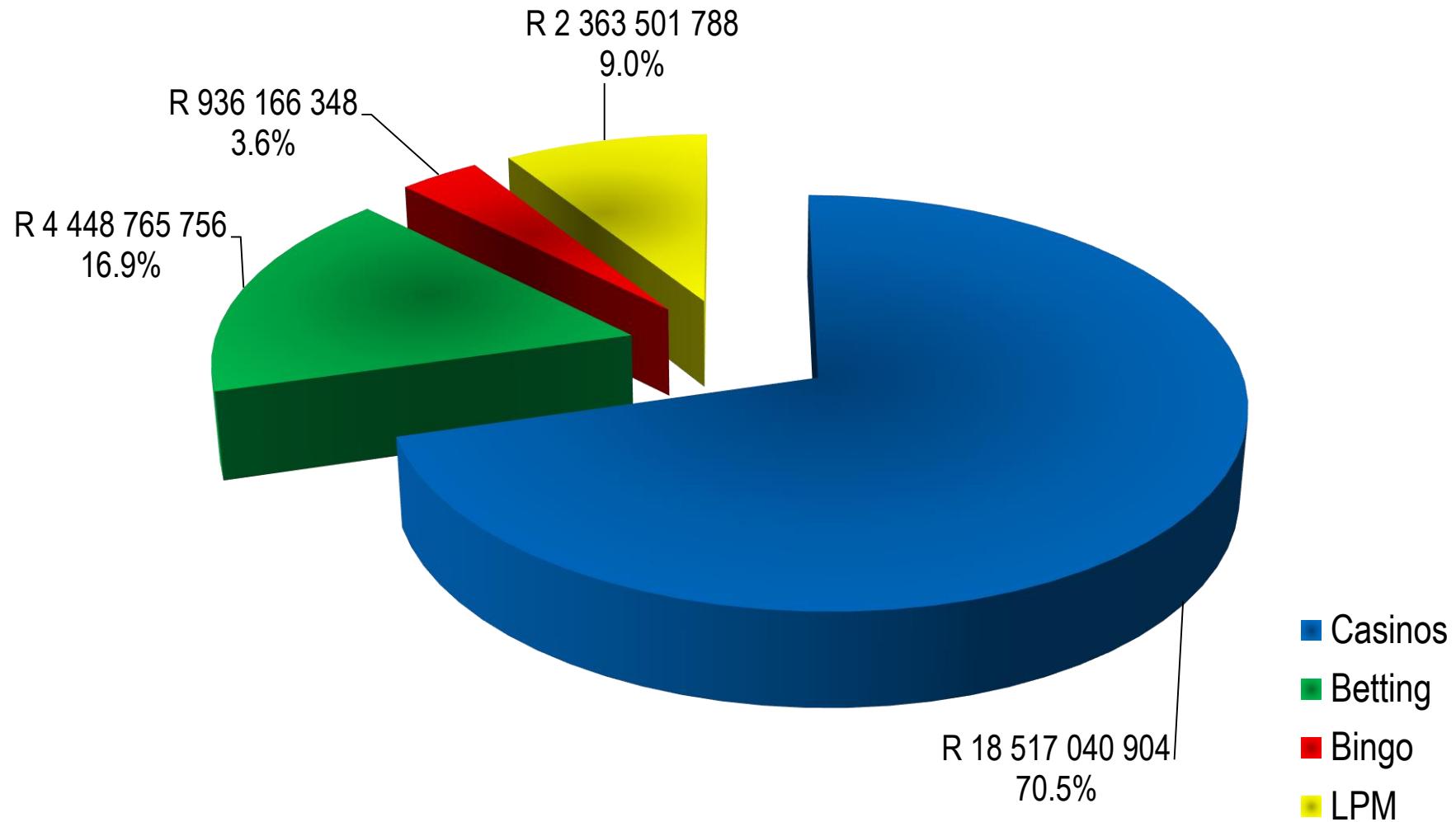
2012 constant prices, Reserve Bank

# Summary : Turnover

- A total amount of R 358 359 106 940 was wagered in FY16 (Quarters 1, 2, 3 & 4).
- Casinos accounted for the highest TO at 77.1% by comparison with all other gambling modes.
- Gauteng accounted for the highest amount of TO in respect of all gambling modes, the total percentage being 45.9% as compared to other provinces.
- Although Gauteng represented the highest amount of turnover relative to casinos (45.8%), betting on horse racing and sport (61.4%), and bingo (64.4%), the highest amount of money in the LPM sector was wagered in Western Cape (30.9%).

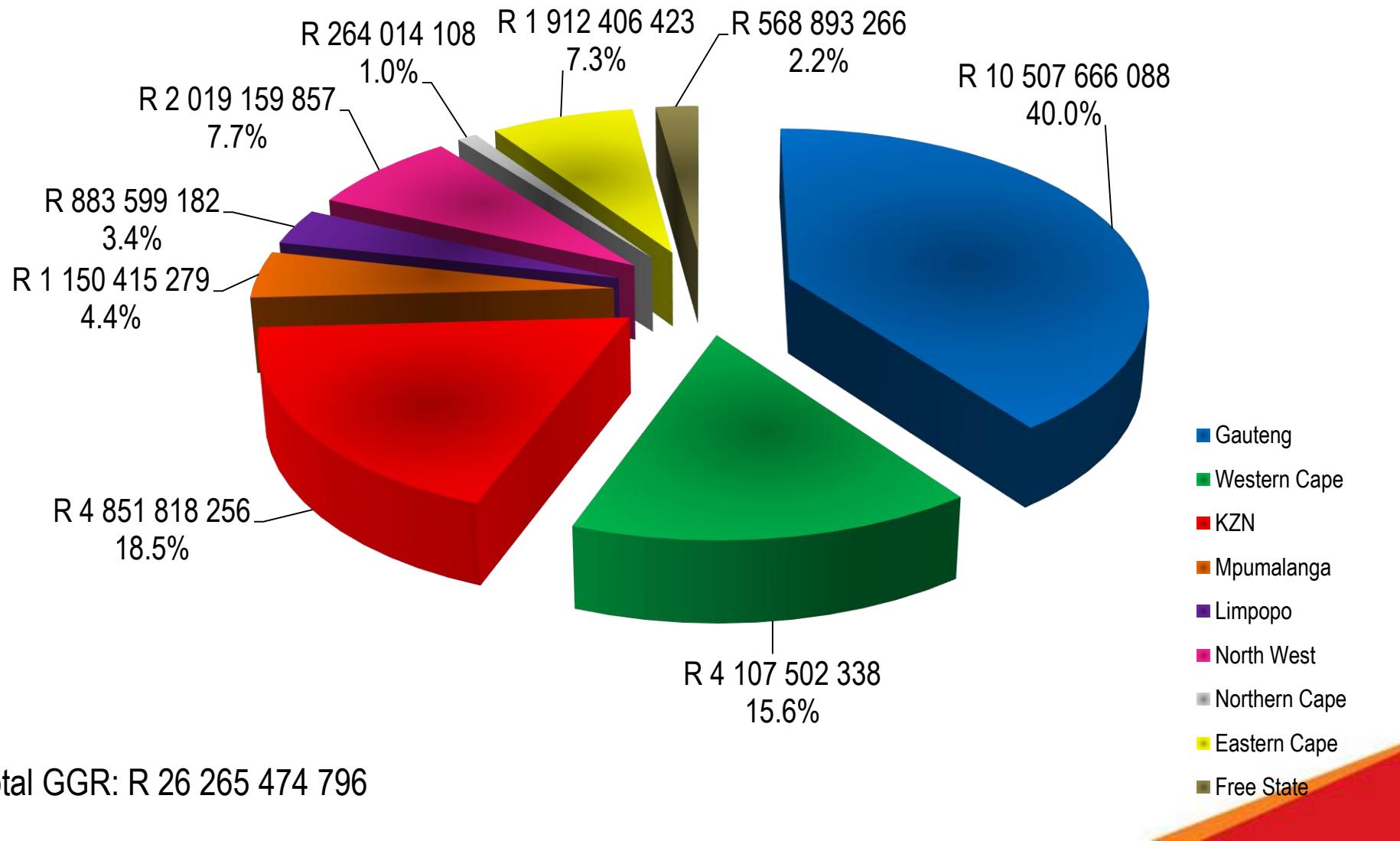
# GGR per gambling mode – FY2016, Qrt 1, 2, 3 & 4

Rand value of the gross revenue of an operator



# GGR per province - FY2016, Qrt 1, 2, 3 & 4

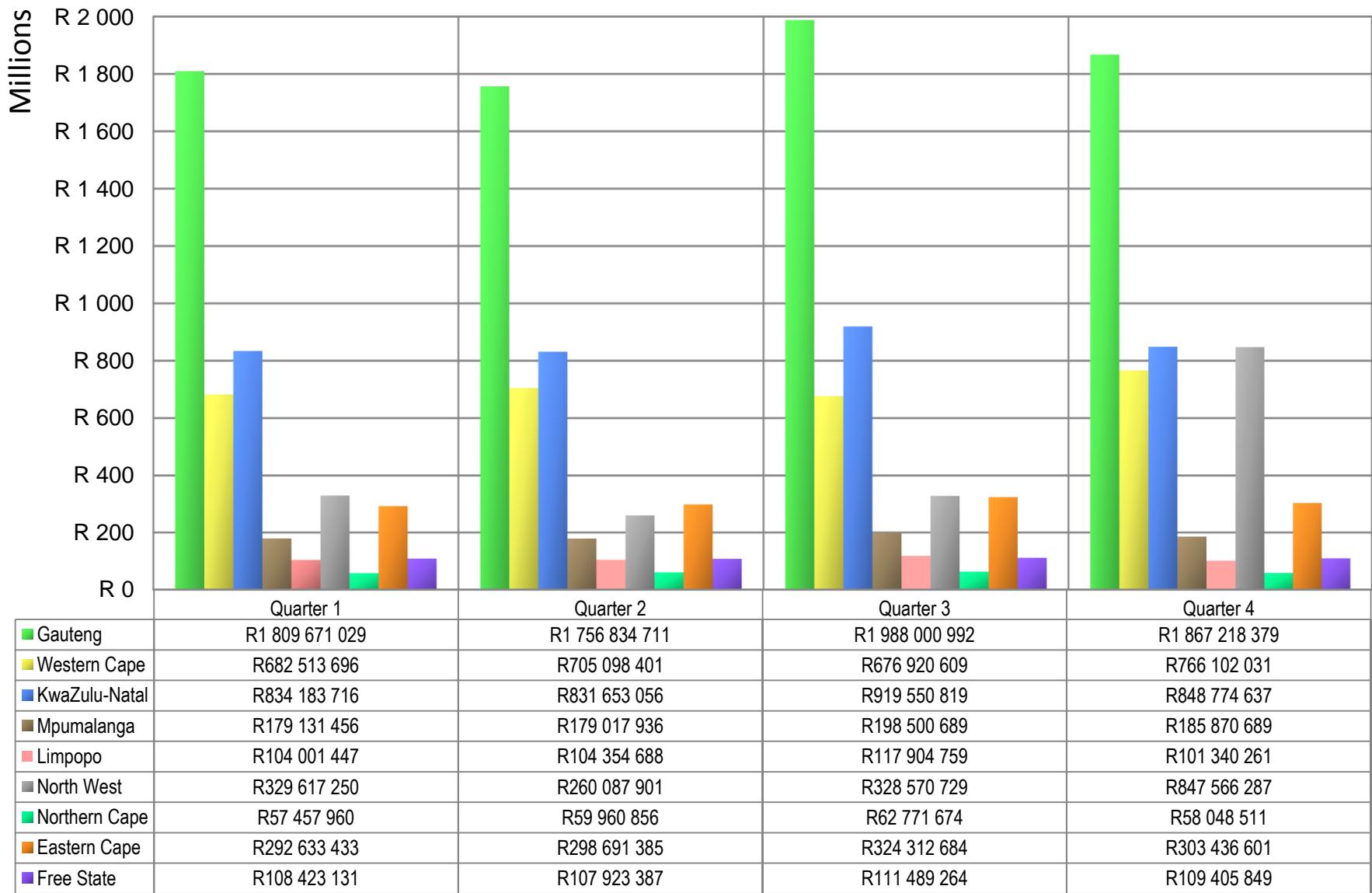
Rand value of the gross revenue of an operator



Total GGR: R 26 265 474 796

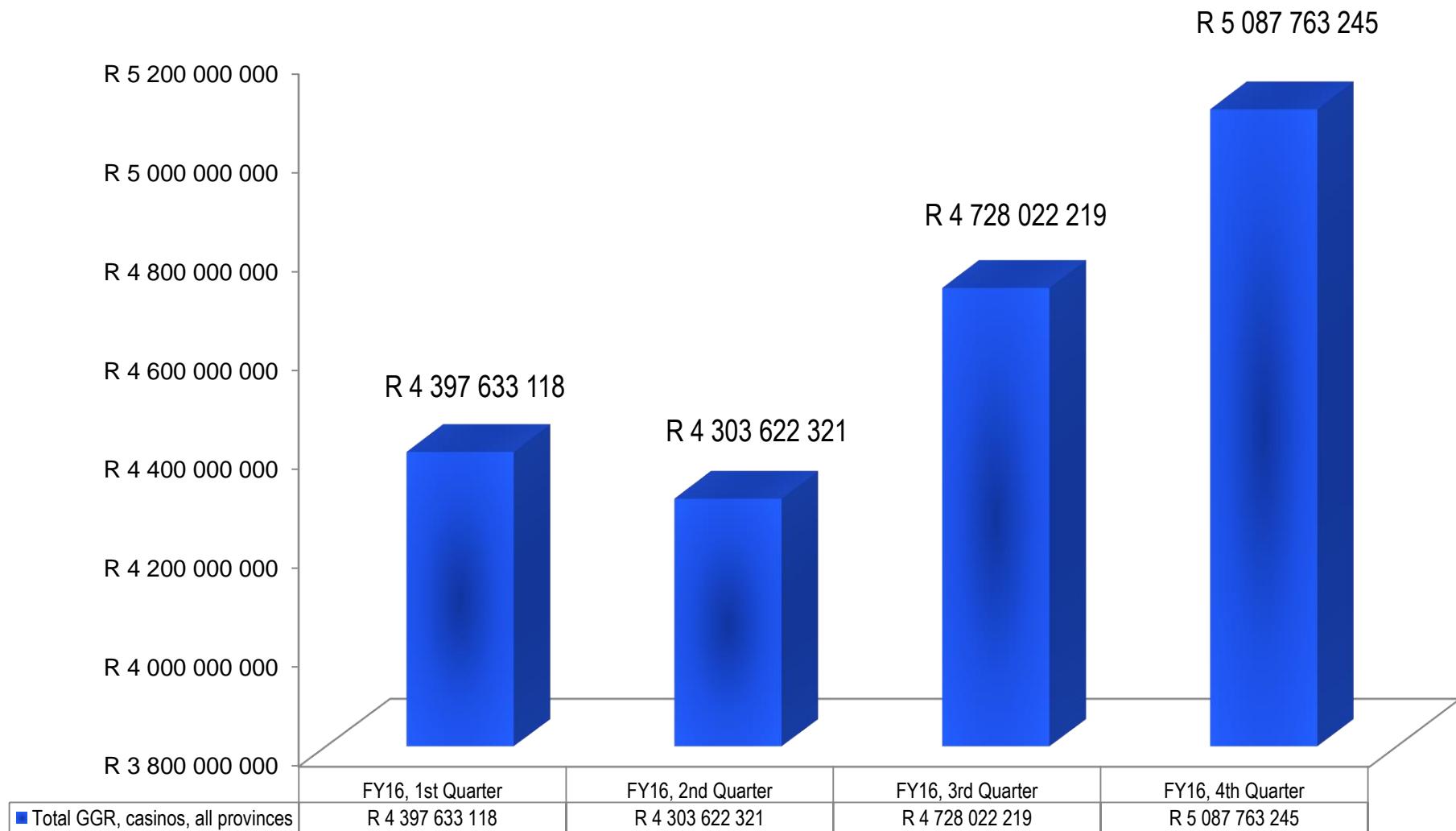
# Quarterly casino GGR - FY2016, Qrt 1, 2, 3 & 4

Rand value of the gross revenue of an operator



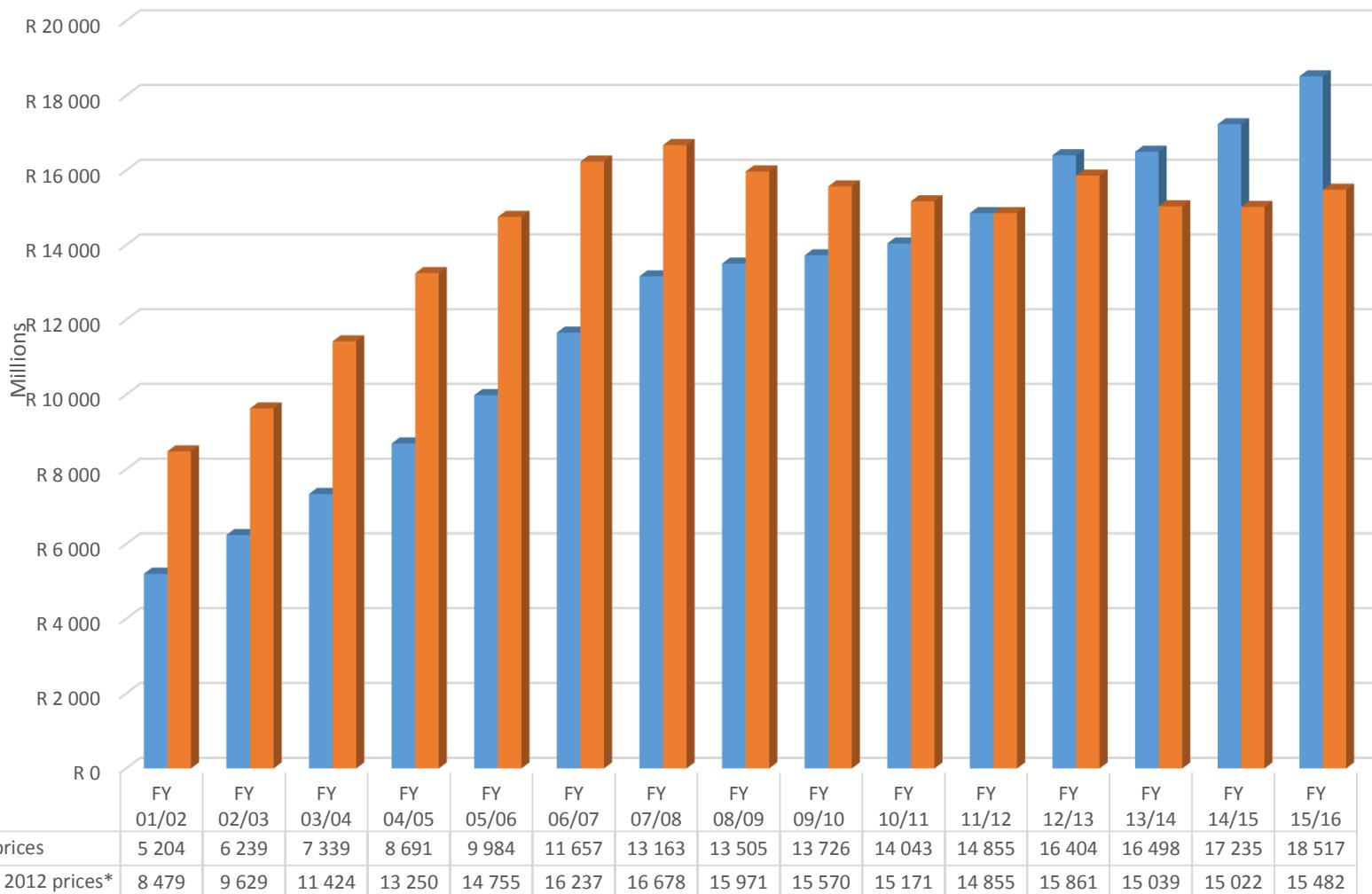
# Trend in GGR casinos – FY16, Qrt 1, 2, 3 & 4

Rand value of the gross revenue of an operator



# Trend in GGR casinos – FY2001/02 to FY2015/16

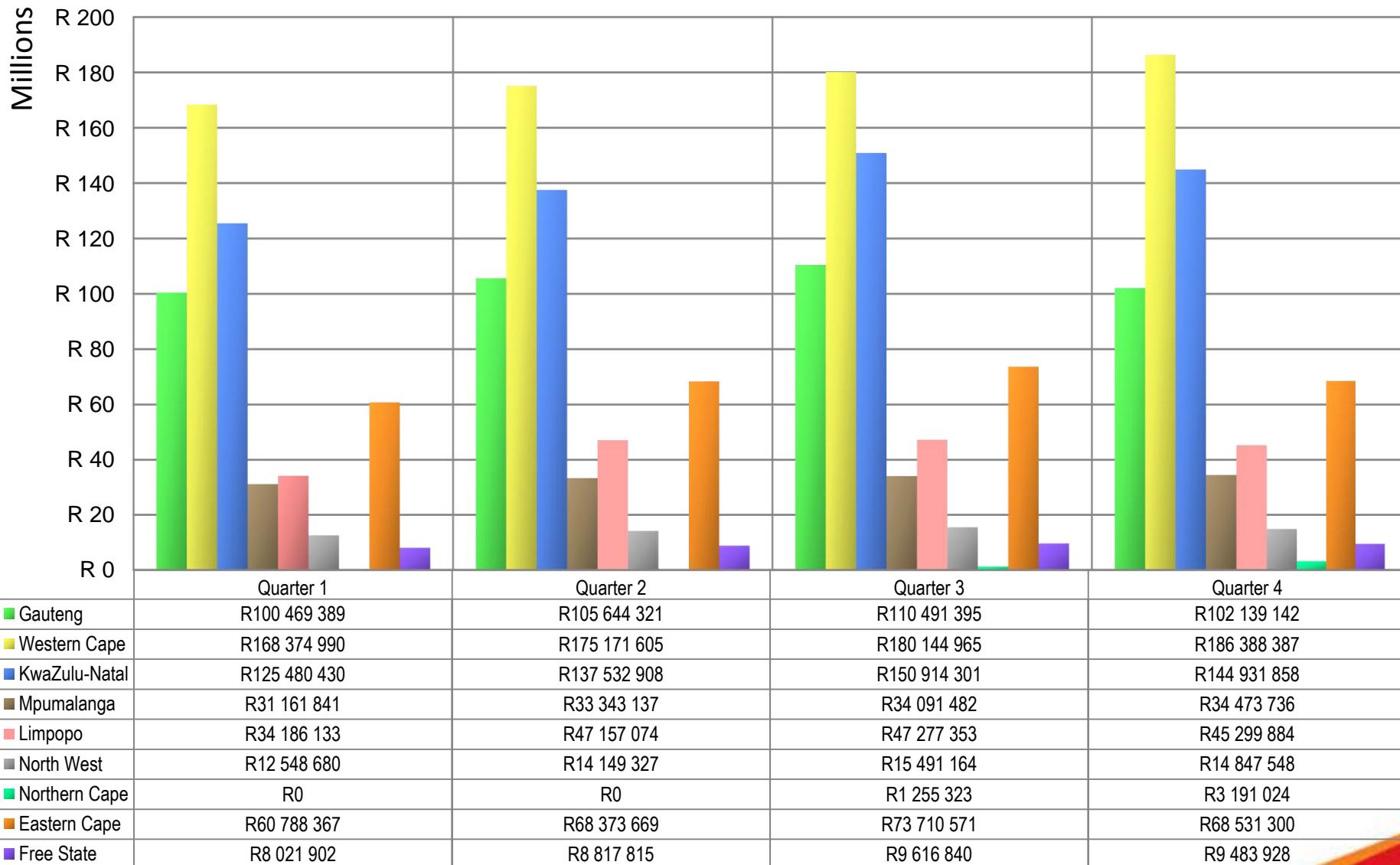
Rand value of the gross revenue of an operator



2012 constant prices, Reserve Bank

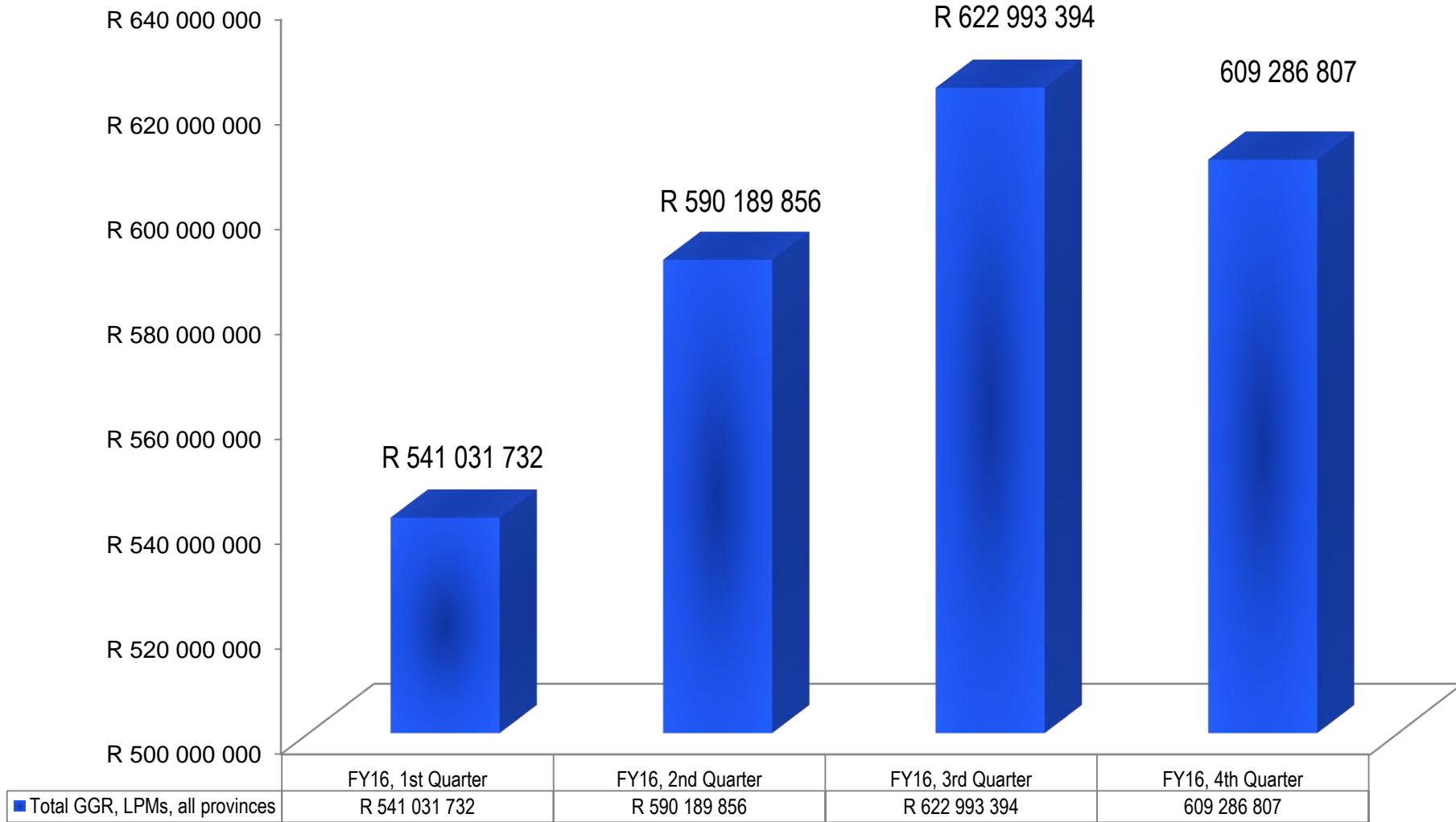
# Quarterly LPM GGR - FY2016, Qrt 1, 2, 3 & 4

Rand value of the gross revenue of an operator



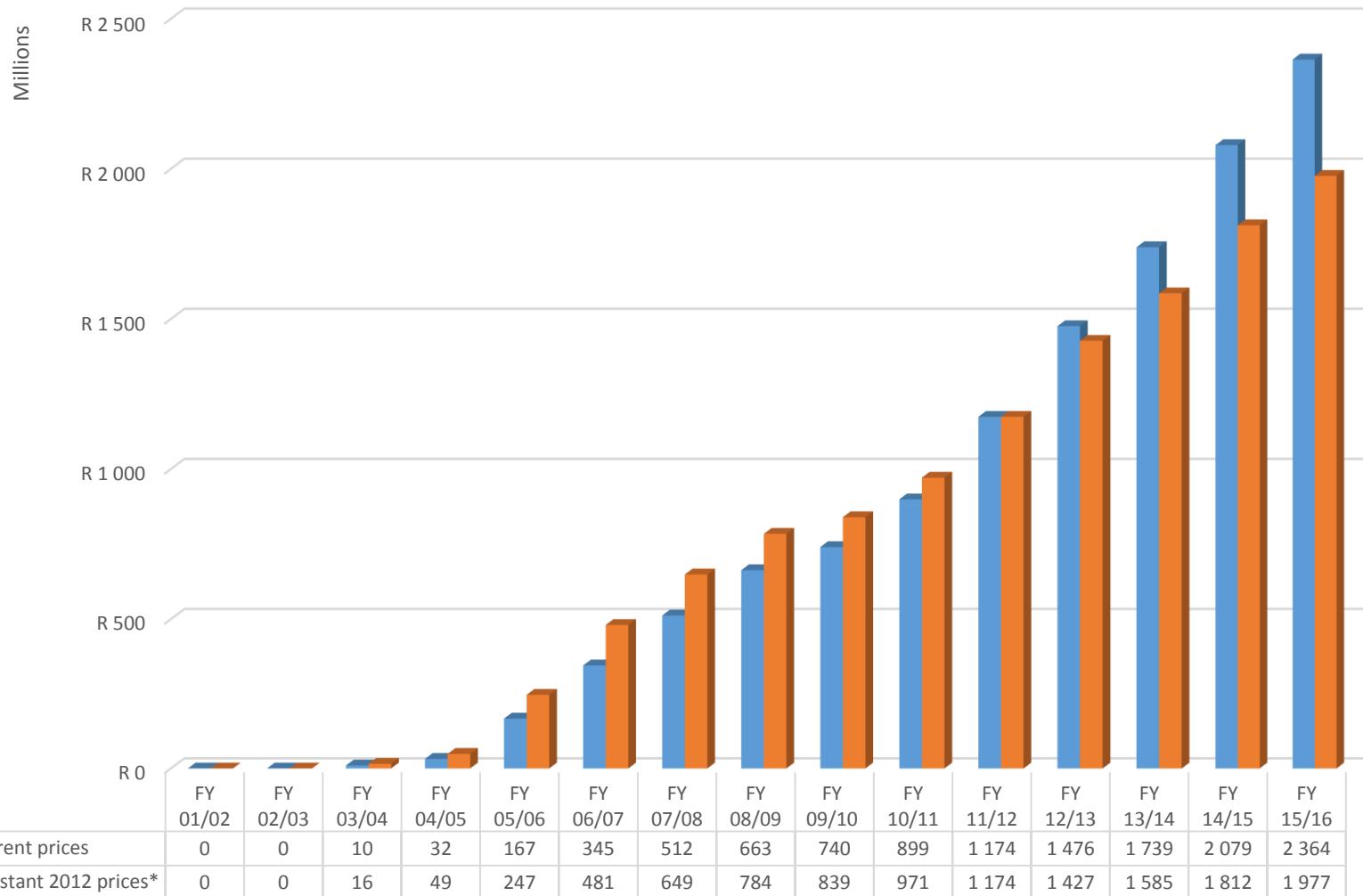
# Trend in GGR LPMs – FY2016, Qrt 1, 2, 3 & 4

Rand value of the gross revenue of an operator



# Trend in GGR LPMs – FY2001/02 to FY2015/16

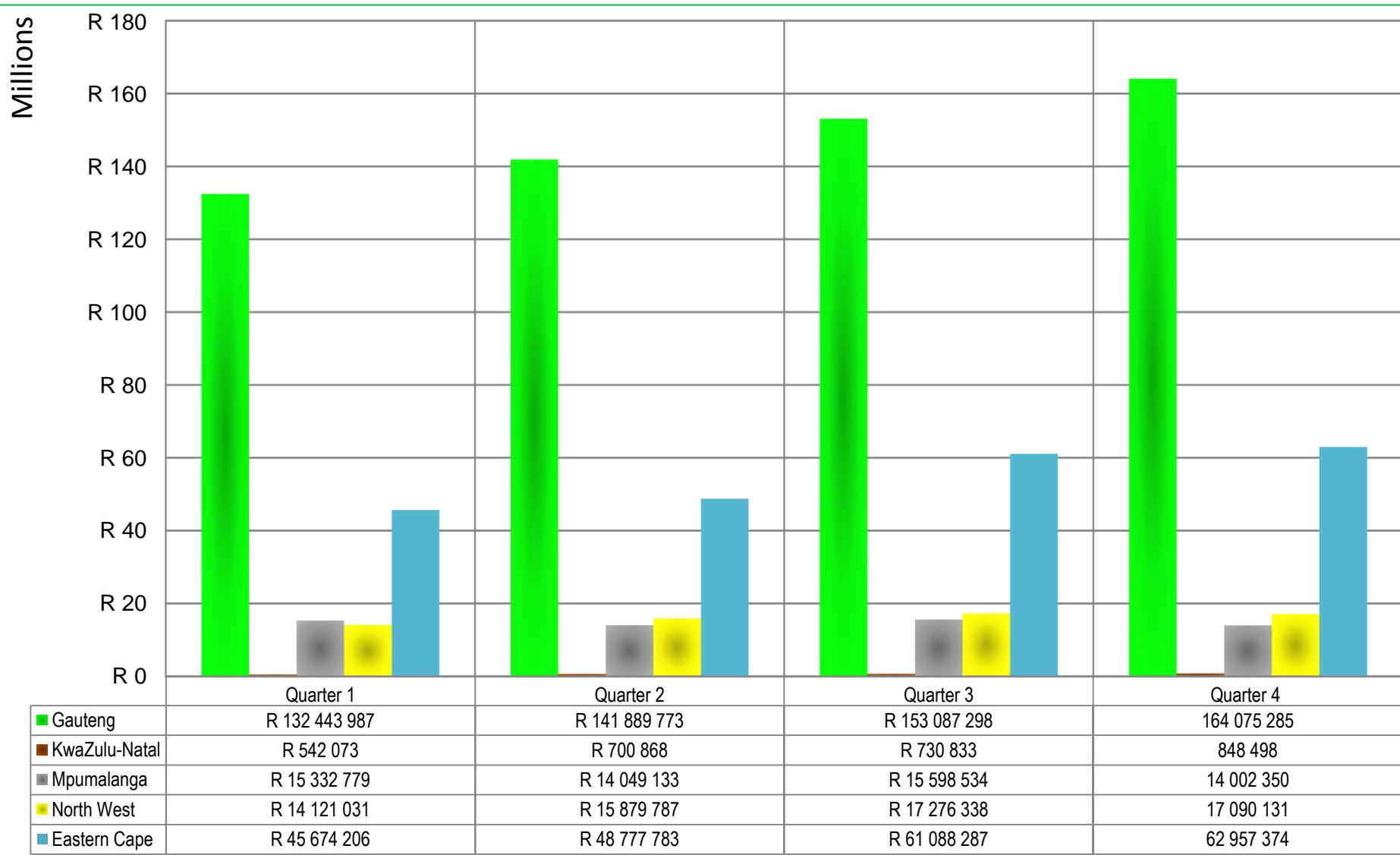
Rand value of the gross revenue of an operator



2012 constant prices, Reserve Bank

# Quarterly bingo GGR - FY2016, Qrt 1, 2, 3 & 4\*

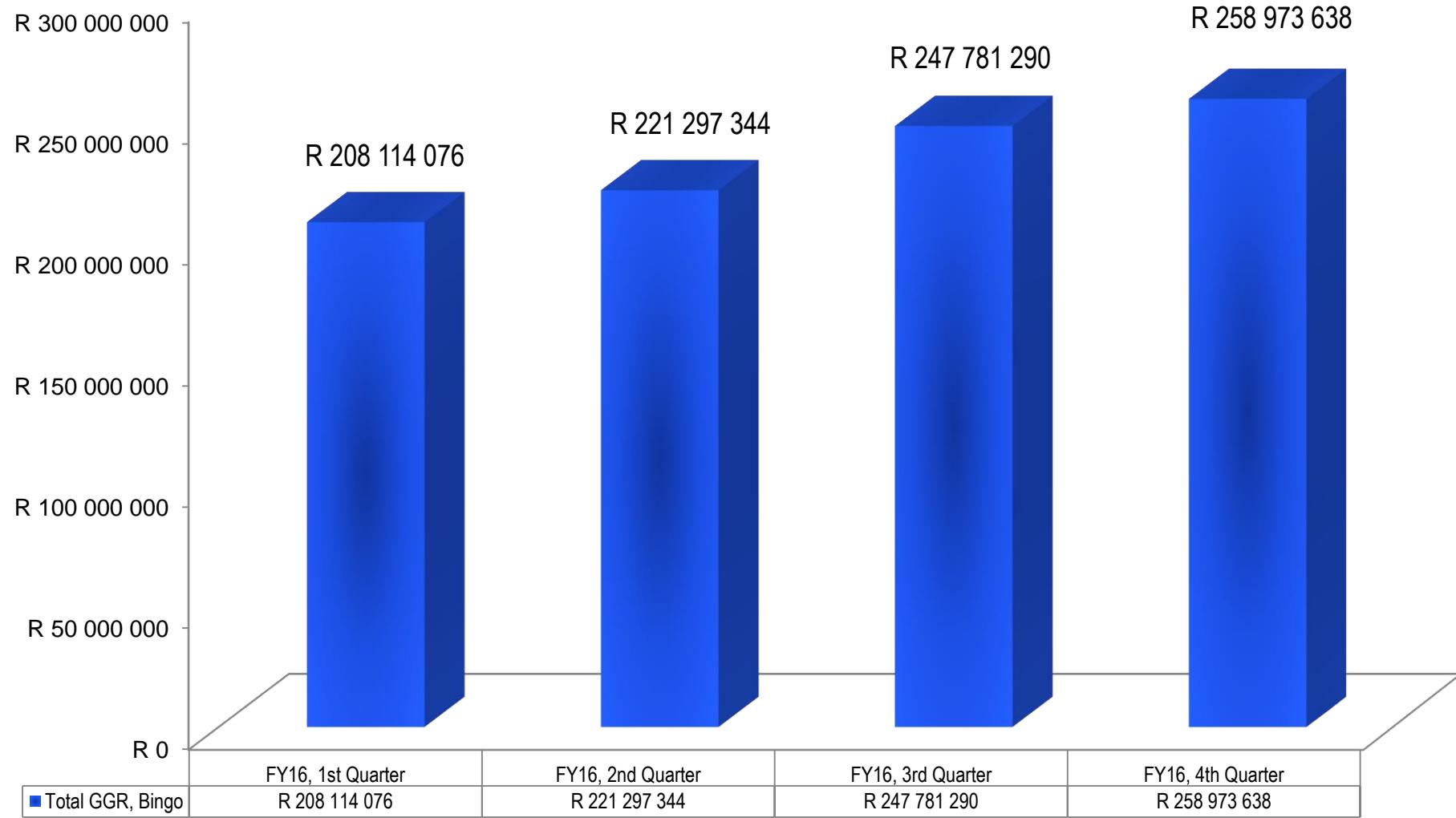
Rand value of the gross revenue of an operator



- Bingo offered for play in Gauteng, Mpumalanga, North West, KwaZulu-Natal and Eastern Cape only
- KZN statistics too low to be visible in graph

# Trend in GGR Bingo – FY2016, Qrt 1, 2, 3 & 4\*

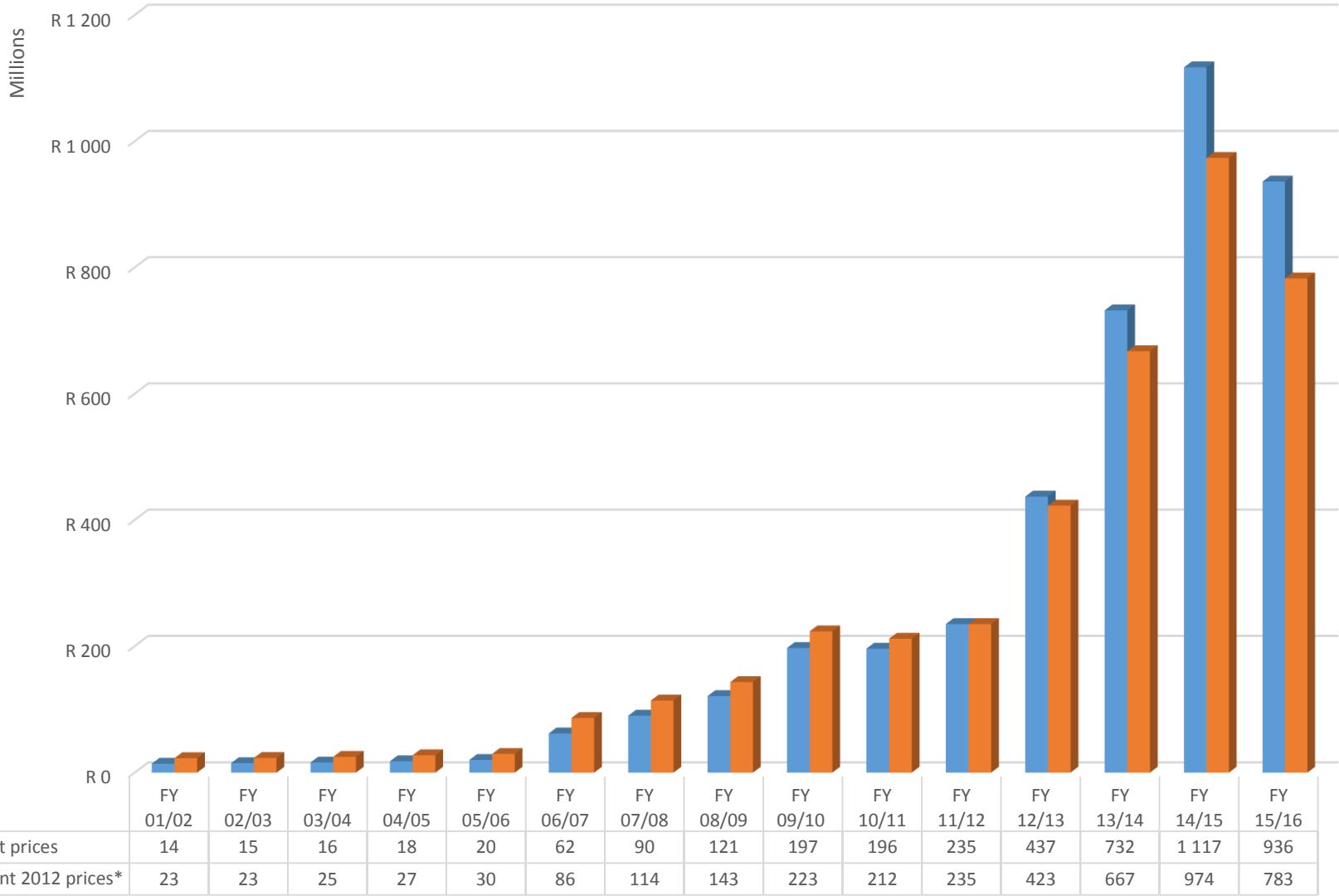
Rand value of the gross revenue of an operator



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

# Trend in GGR bingo – FY2001/02 to FY2015/16

Rand value of the gross revenue of an operator



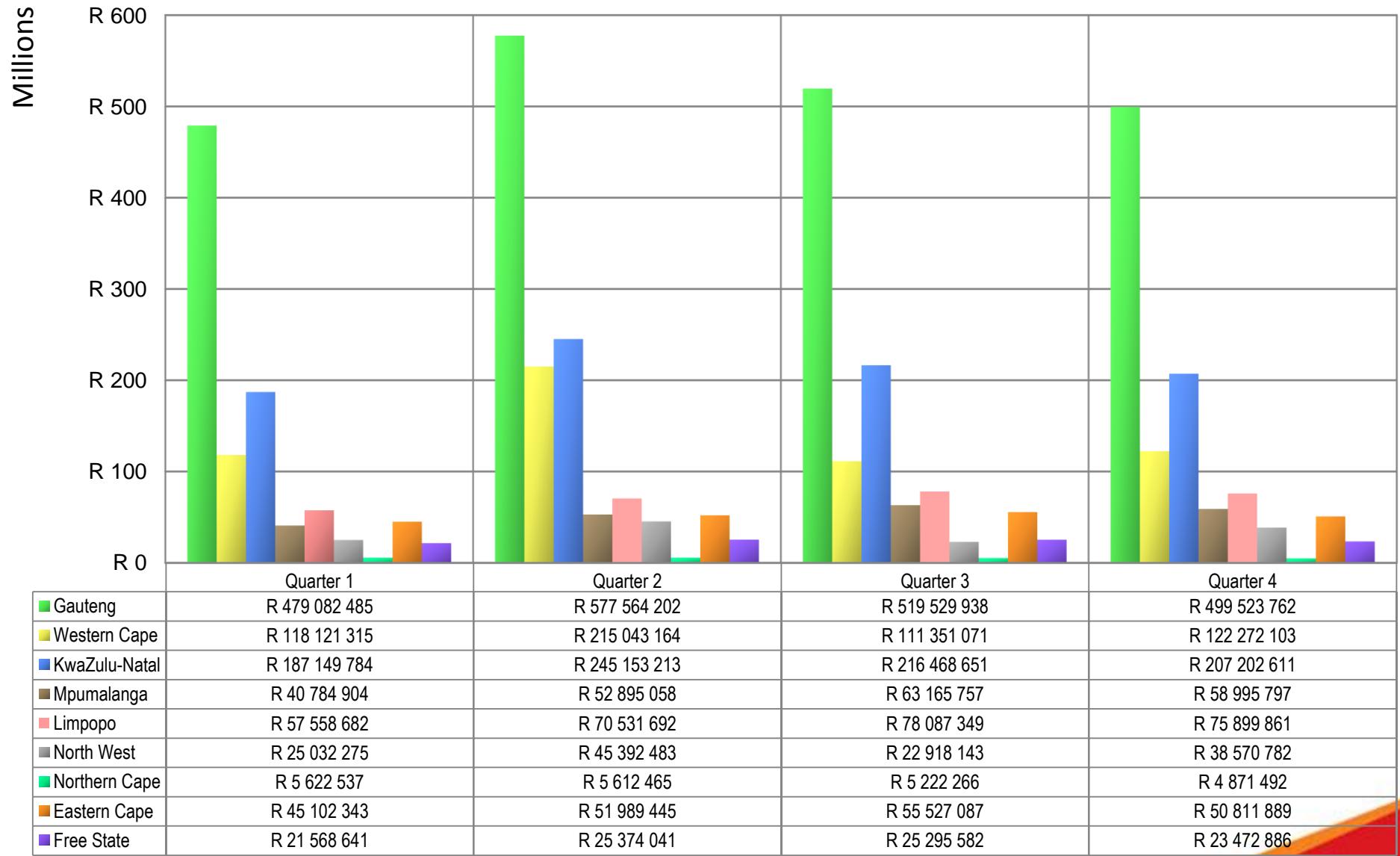
2012 constant prices, Reserve Bank

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

# Quarterly betting GGR – FY2016, Qrt 1, 2, 3 & 4

## Bookmakers & Totalisators

Rand value of the gross revenue of an operator

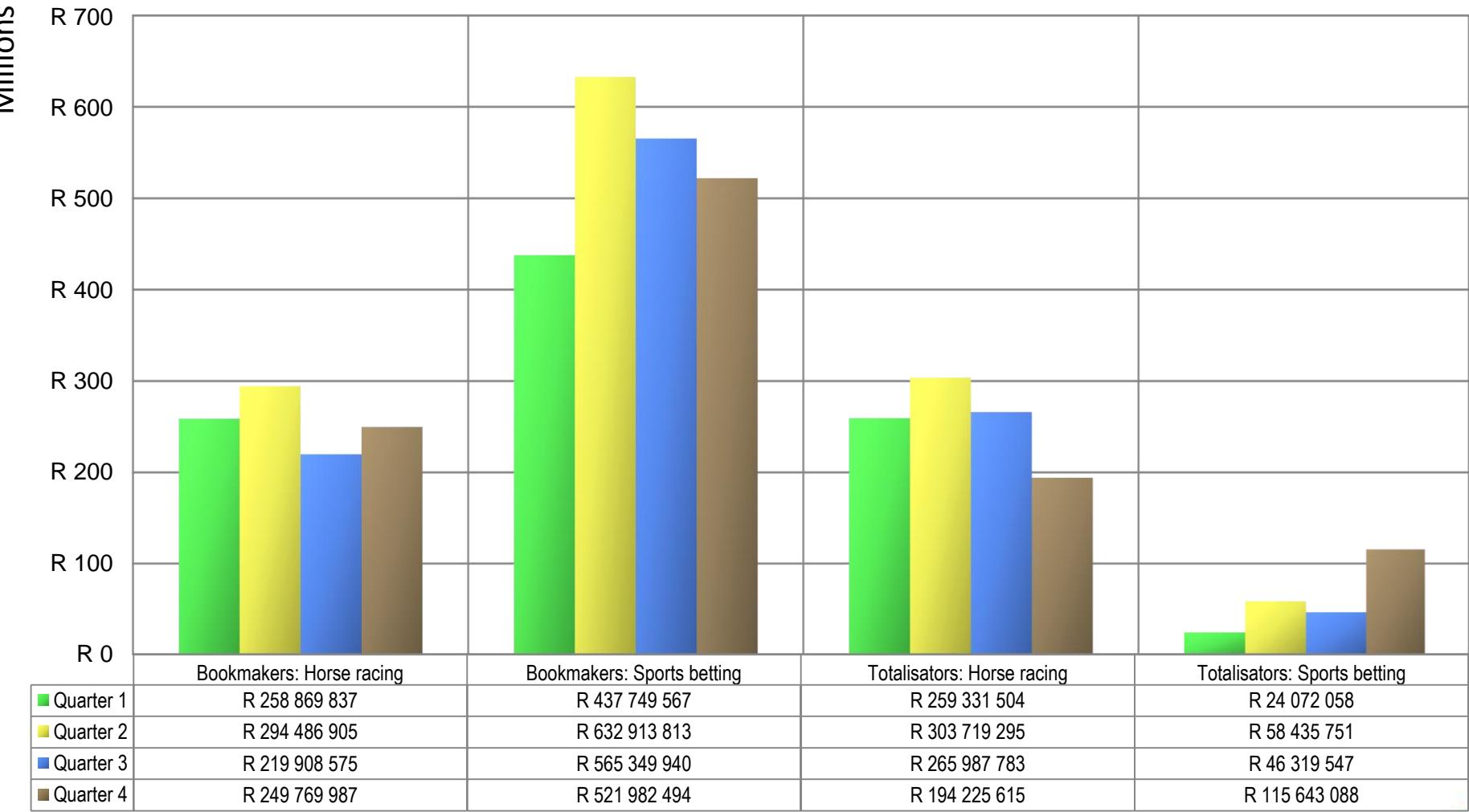


# Quarterly betting GGR – FY2016, Qrt 1, 2, 3 & 4

## Split between Bookmakers & Totalisators

### Betting on horse racing & sport

Rand value of the gross revenue of an operator

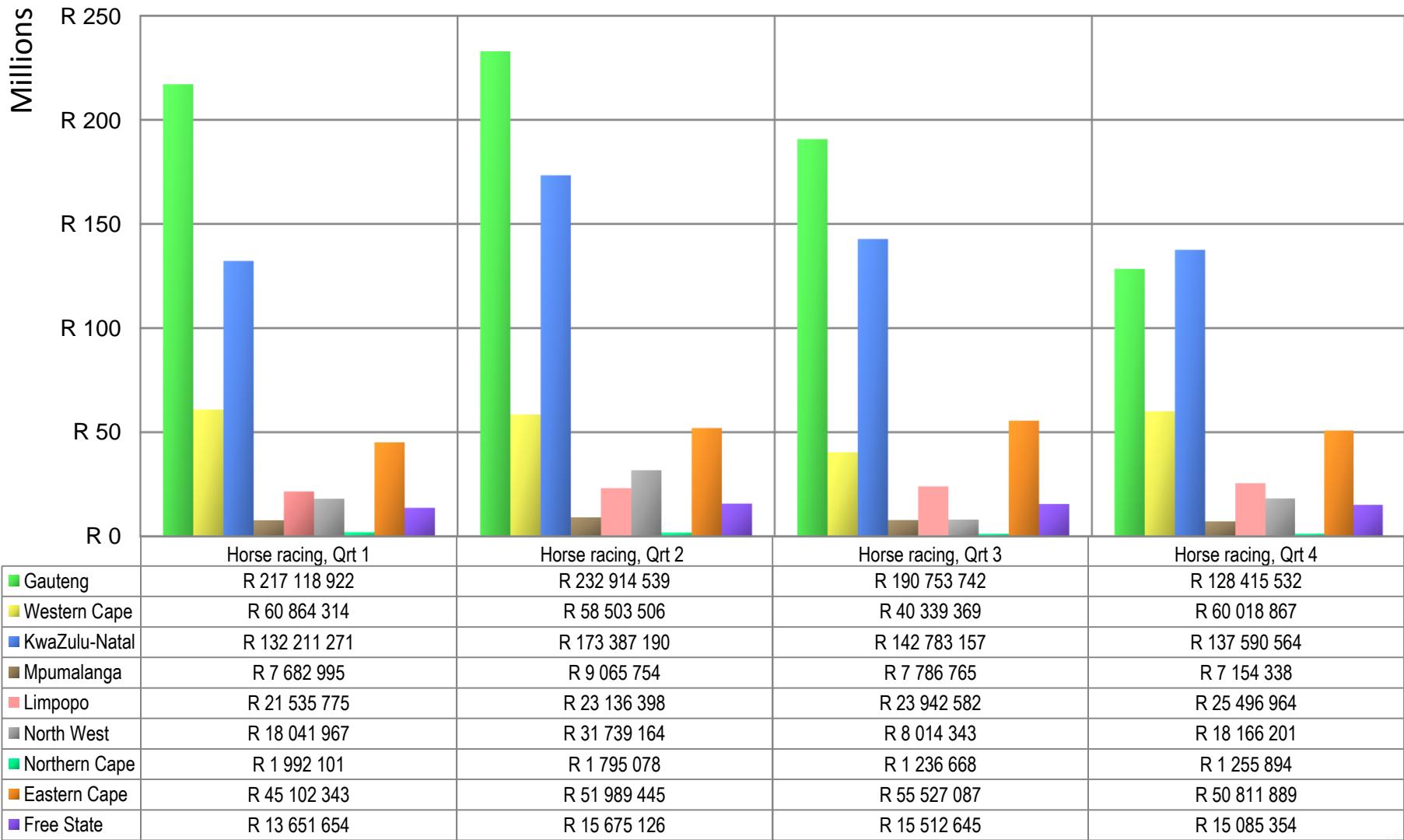


\* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

# Quarterly betting GGR – FY2016, Qrt 1, 2, 3 & 4

## Betting on horse racing\*

Rand value of the gross revenue by an operator

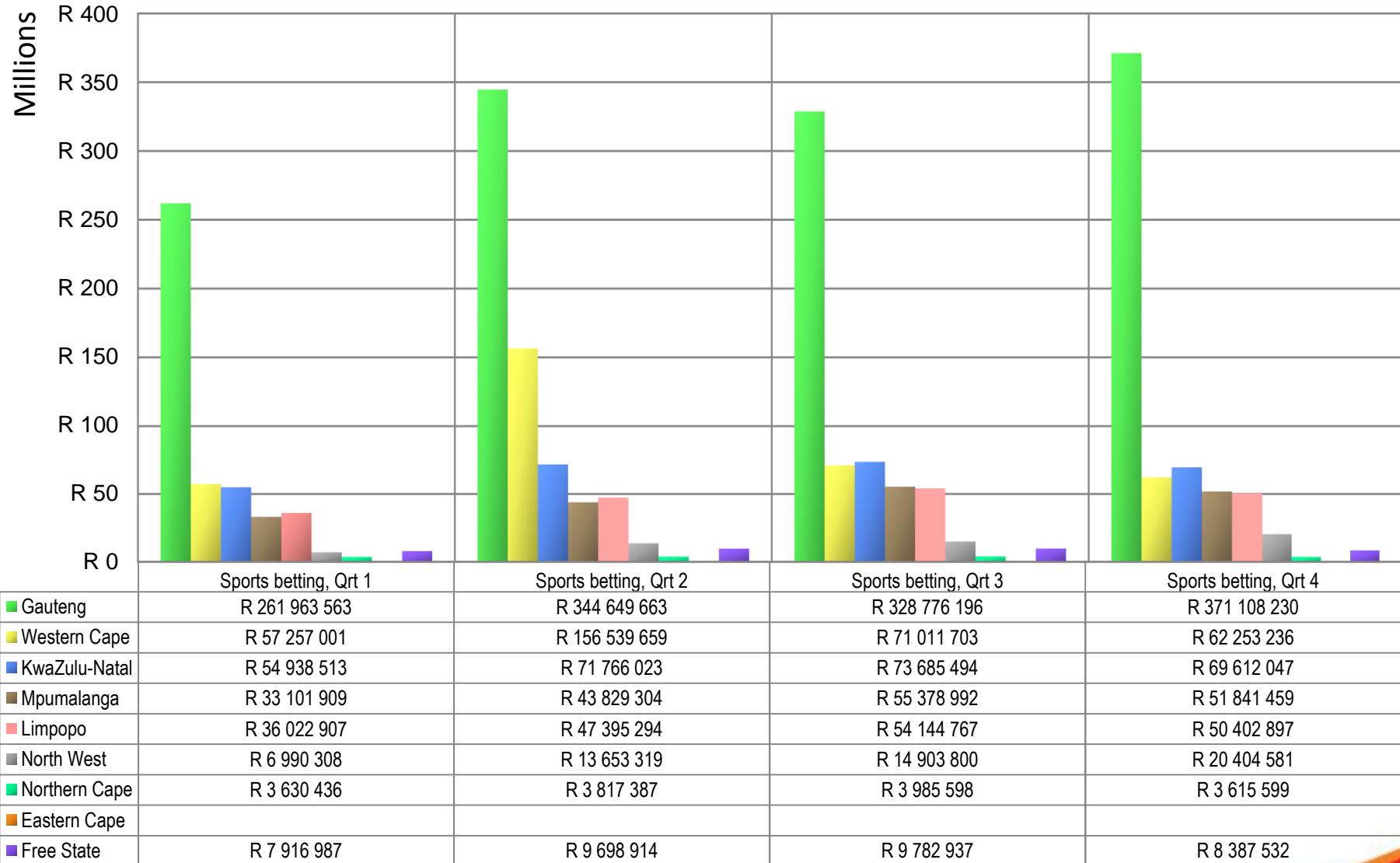


\* Eastern Cape: Statistics includes sports betting

# Quarterly betting GGR – FY2016, Qrt 1, 2, 3 & 4

## Betting on sport\*

Rand value of the gross revenue by an operator

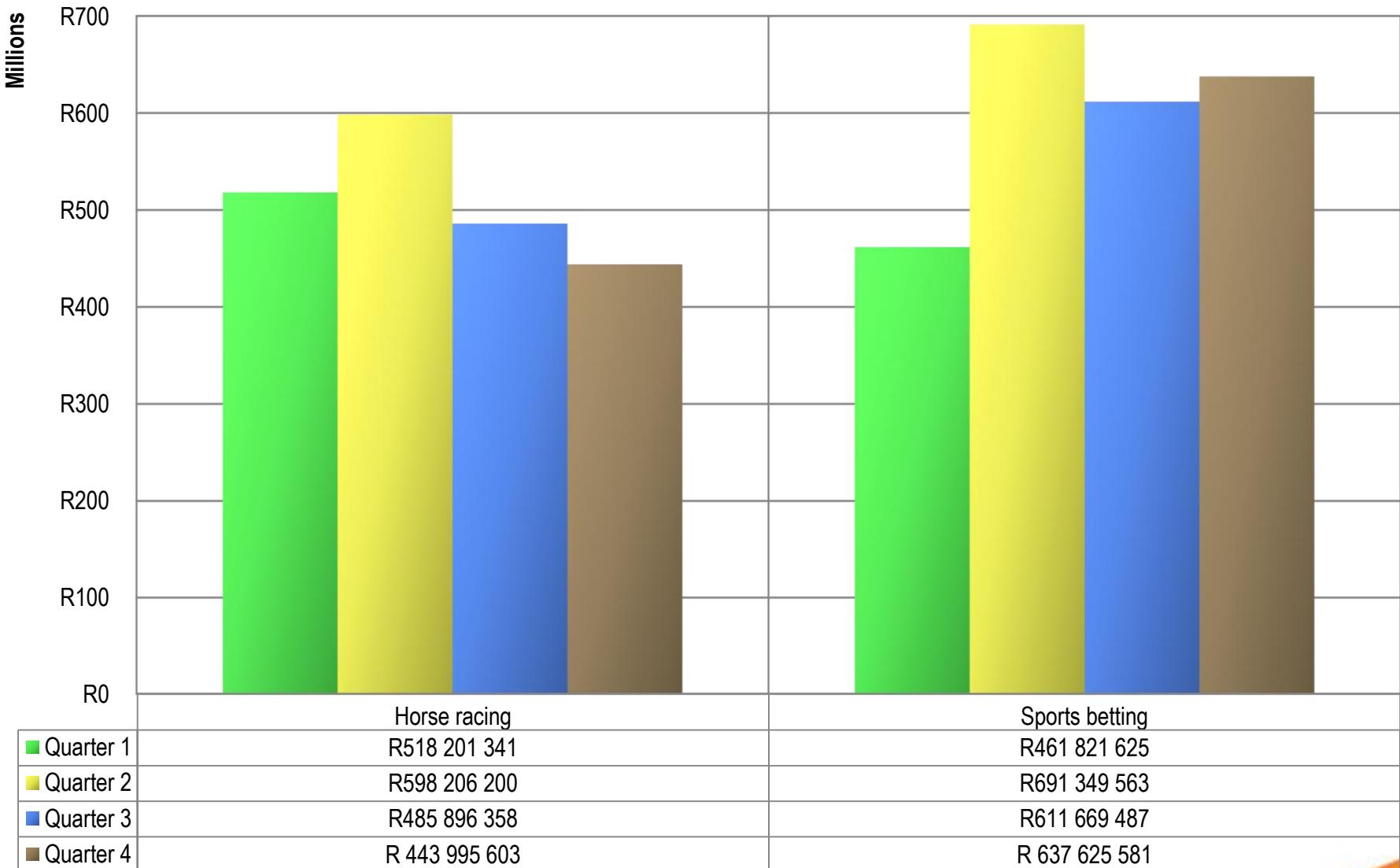


\* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

# Quarterly betting GGR – FY2016, Qrt 1, 2, 3 & 4

## Split between betting on horse racing & sport\*

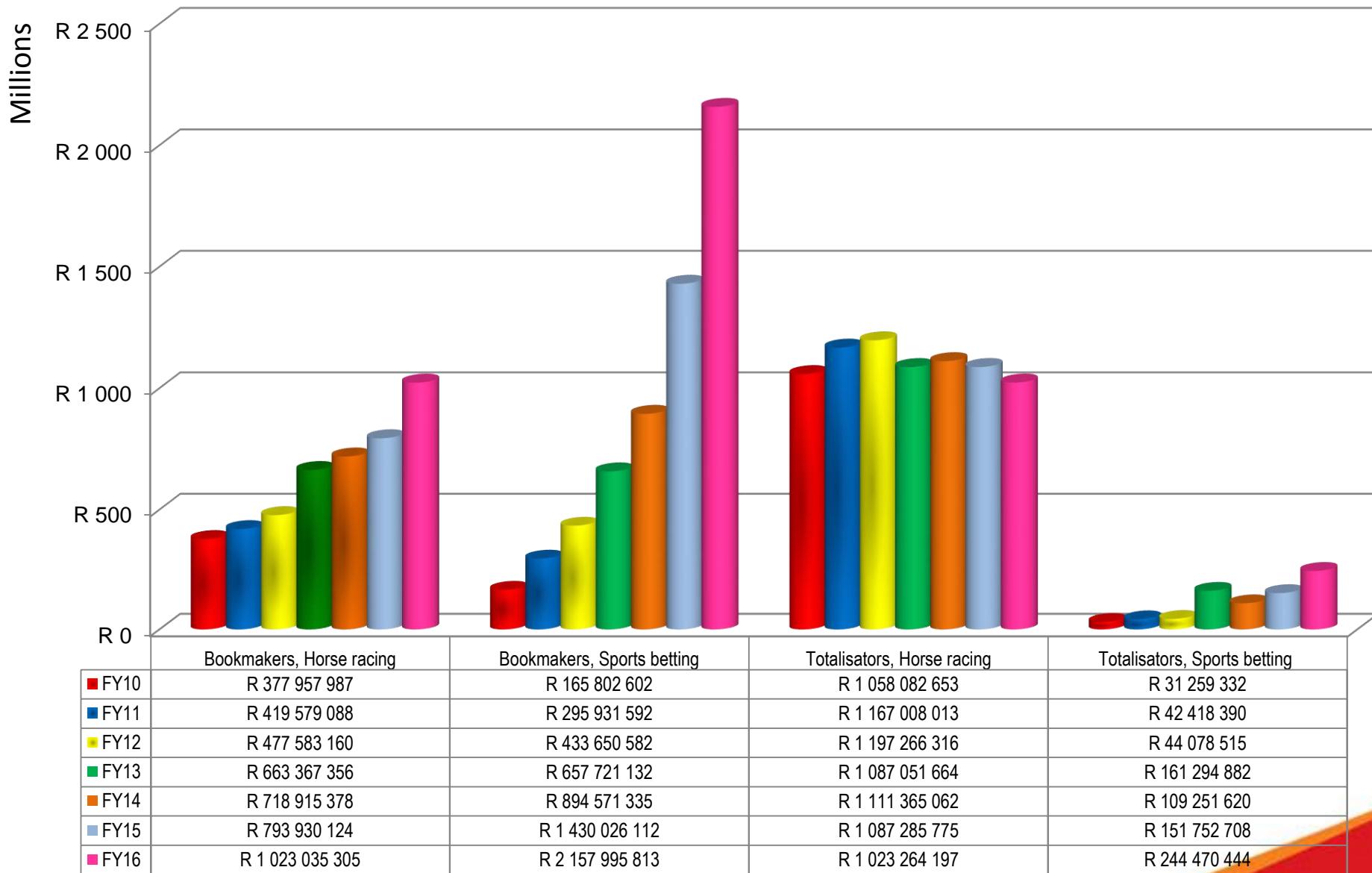
Rand value of the gross revenue by an operator



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

# Trend in GGR, bookmakers & totalisators – FY2010 to FY2016

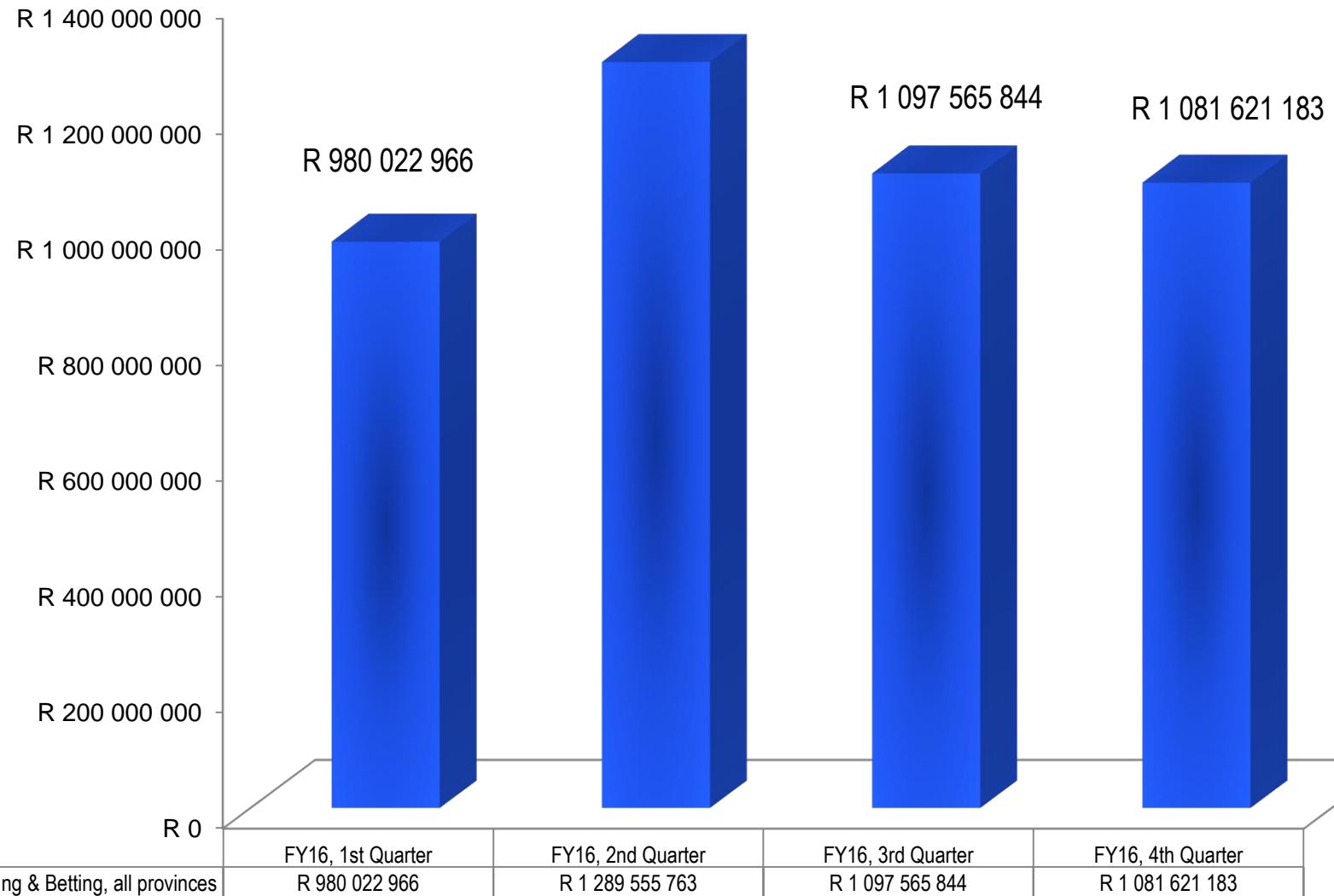
Rand value of the gross revenue by an operator



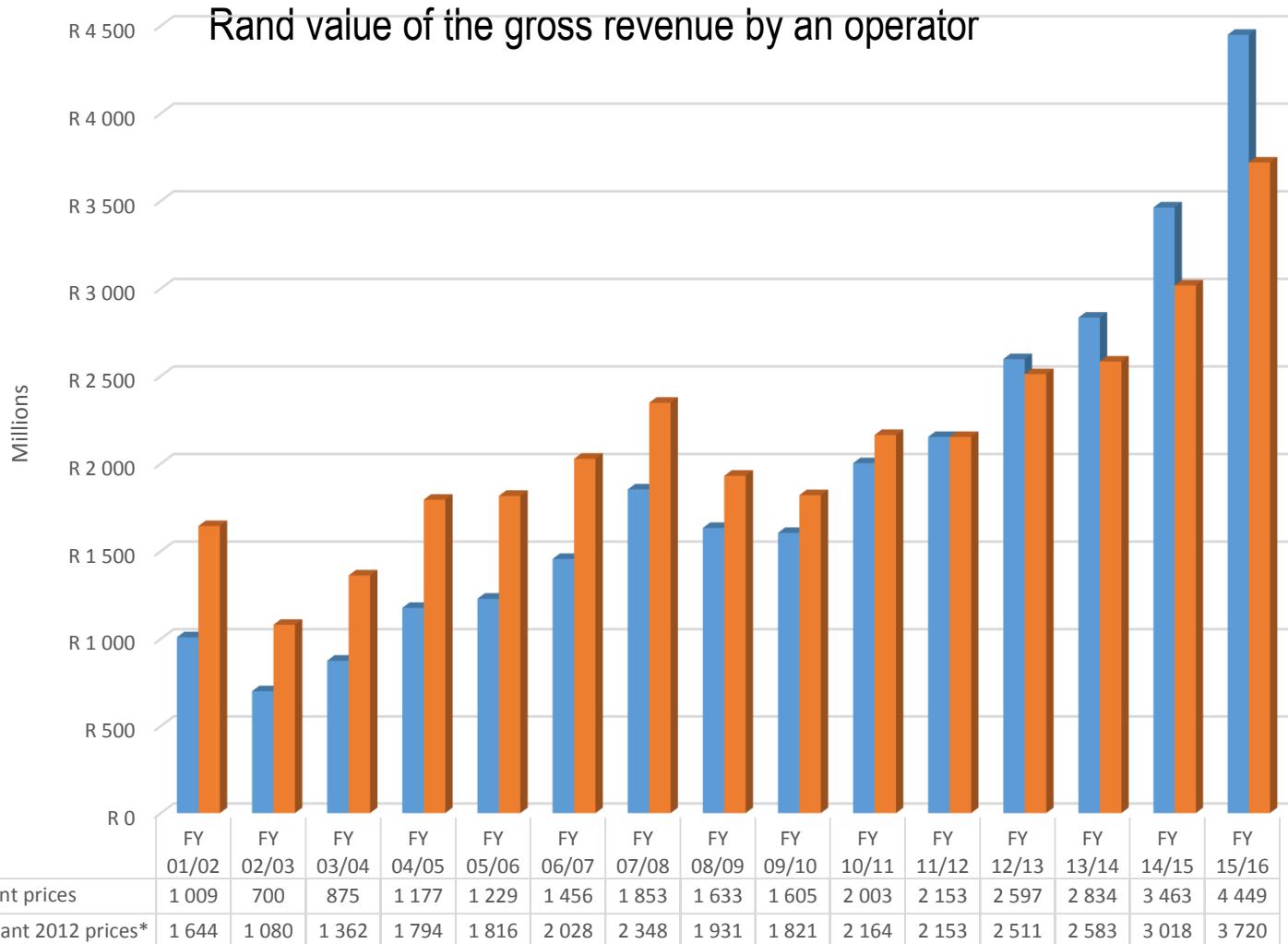
# Trend in GGR betting on horse racing & sport – FY2016, Qrt 1, 2, 3 & 4

Rand value of the gross revenue of an operator

R 1 289 555 763



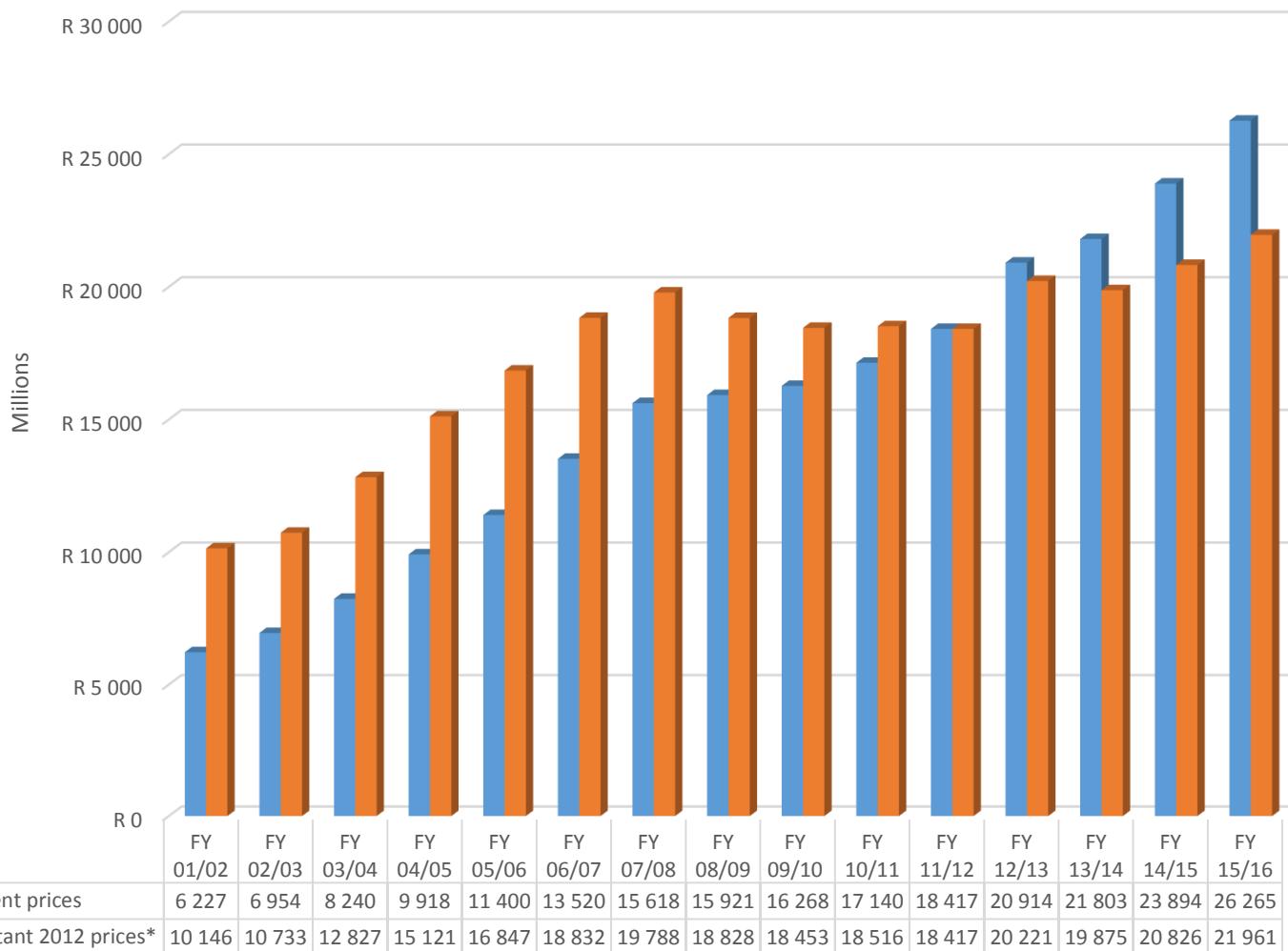
# Trend in GGR betting on horse racing & sport – FY2001/02 to FY2015/16



2012 constant prices, Reserve Bank

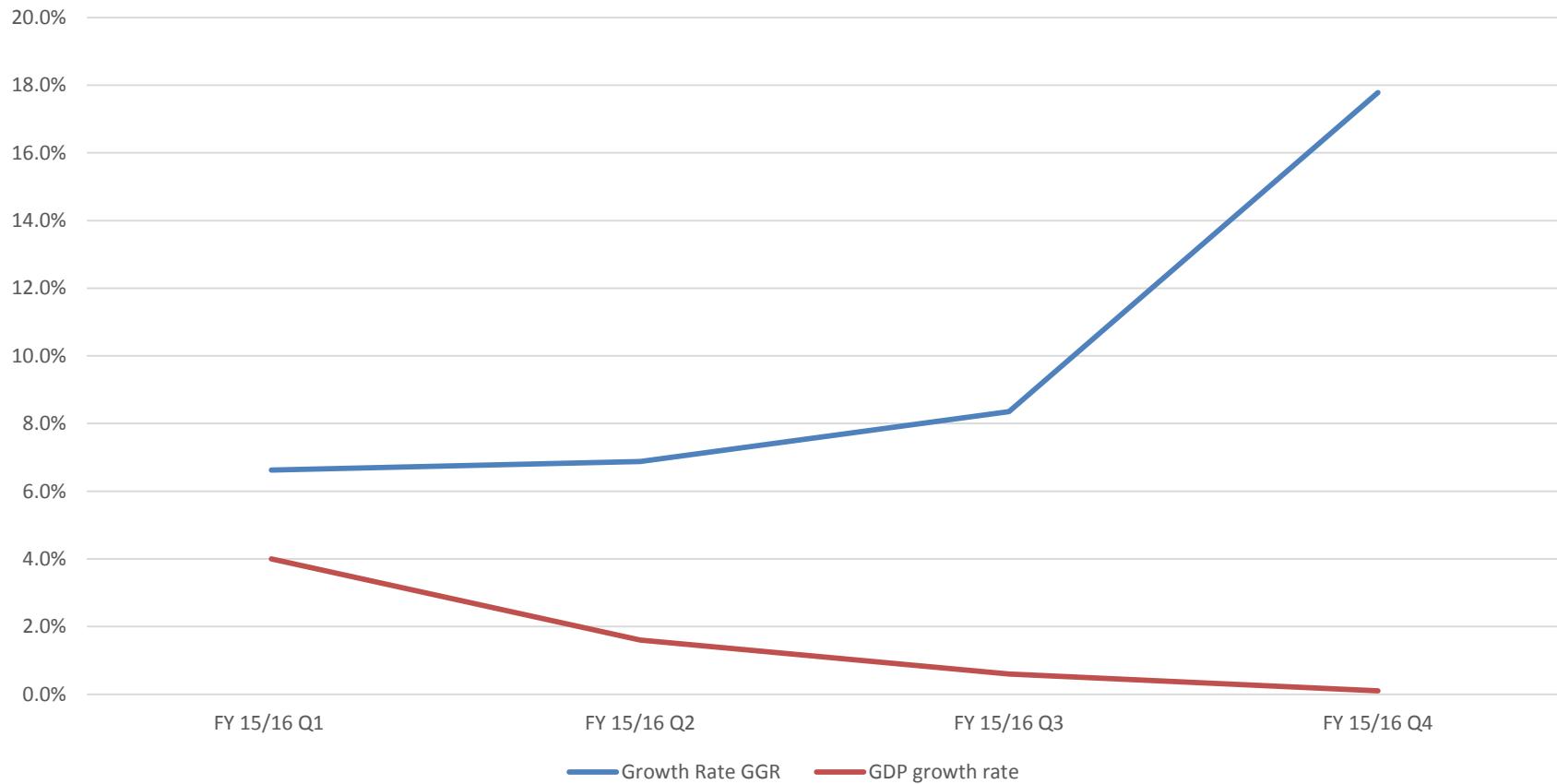
# Trend in GGR – FY2001/02 to FY2015/16 (all modes and provinces)

Rand value of the gross revenue by an operator



2012 constant prices, Reserve Bank

# Growth rate of GGR and real GDP FY16 (all modes and provinces)



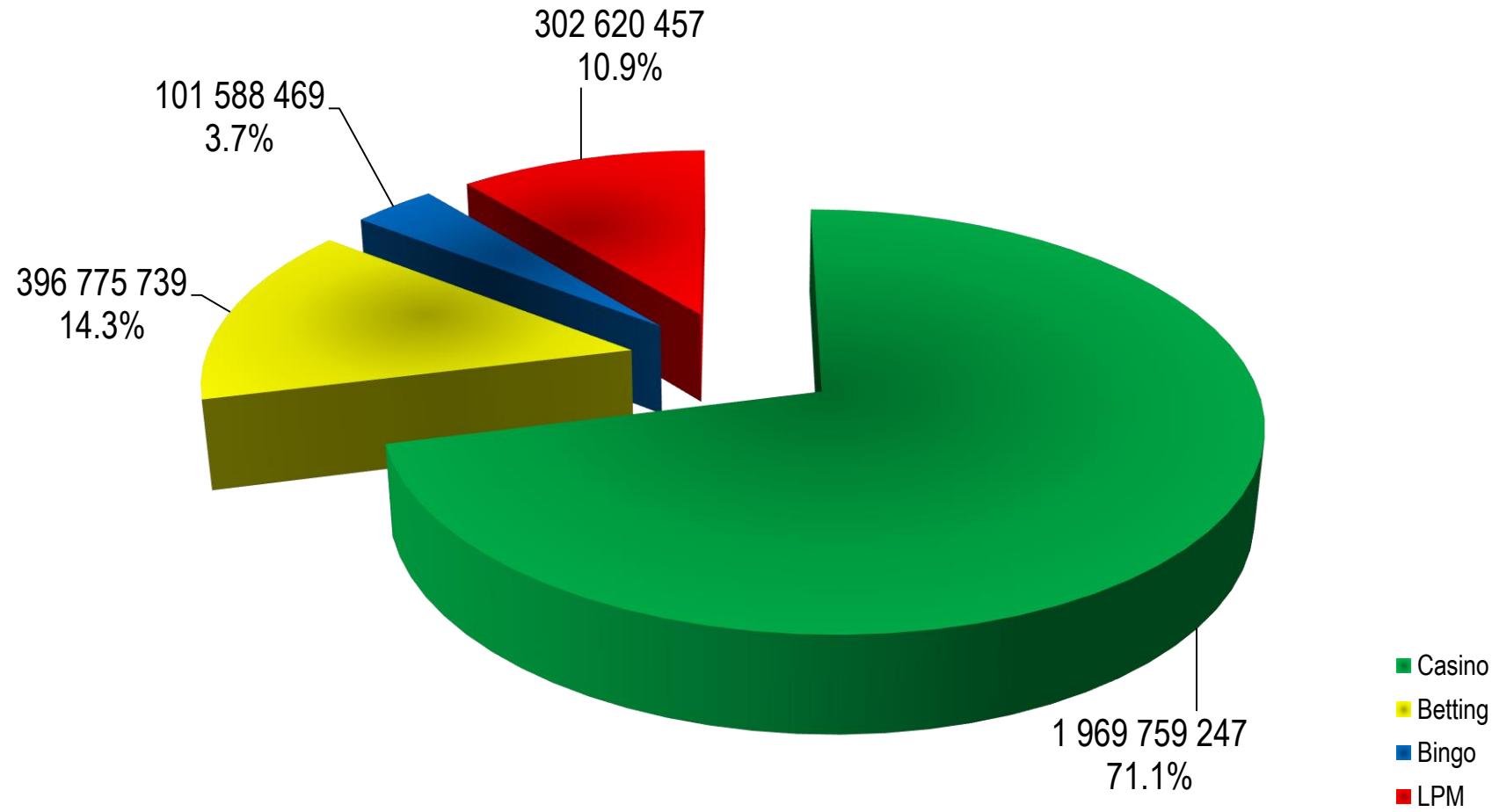
# Summary : GGR

- GGR increased by 9.6% from R 21,8 billion in FY14 to R 23,9 billion in FY15, and by 9.9% to R26,3 billion in FY16. A total amount of R 26 265 474 796 referred to as GGR was generated during FY16, Quarters 1, 2, 3 & 4.
- In real terms however, the GGR increased by 4.8% in FY15 from slow negative growth in FY14 of -1.7%, and by 5.5% in FY16.
- During FY16, as at 31 March 2016, casinos accounted for the highest GGR being 70.5% as compared to other gambling modes.
- Compared to all other provinces, Gauteng at a 40.0% share, accounted for the highest amount of GGR generated.
- Although Gauteng generated the highest amount of GGR relative to casinos (40.1%), betting on horse racing and sport (46.7%), and bingo (63.2%), the highest amount of GGR was generated in the LPM sector in Western Cape (30.0%).

# Taxes/levies contribution per gambling mode – FY2016

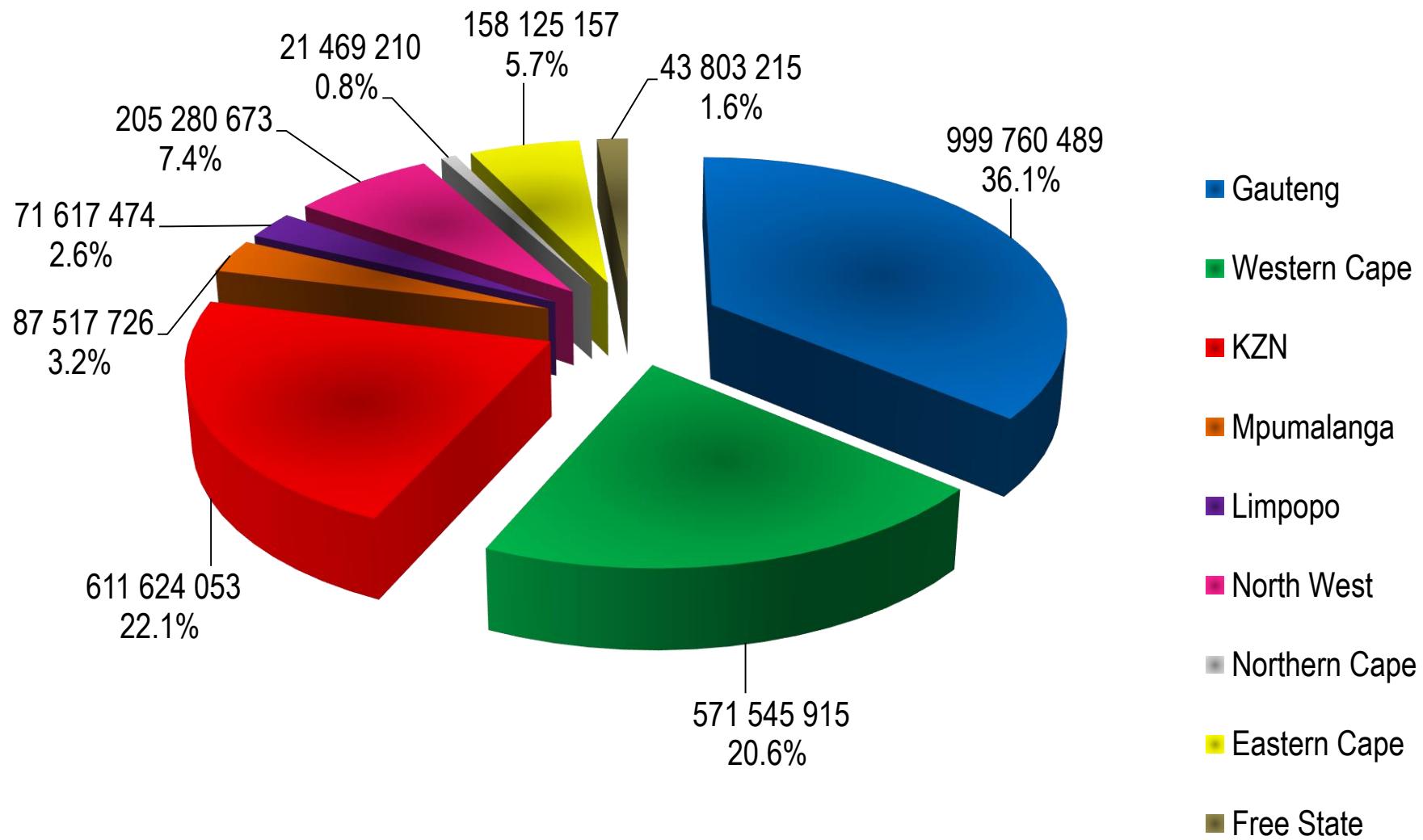
## Qrt 1, 2, 3 & 4

Gambling tax levied and collected by PLAs



# Taxes/levies contribution per province – FY2016, Qrt 1, 2, 3 & 4

Gambling tax levied and collected by PLAs

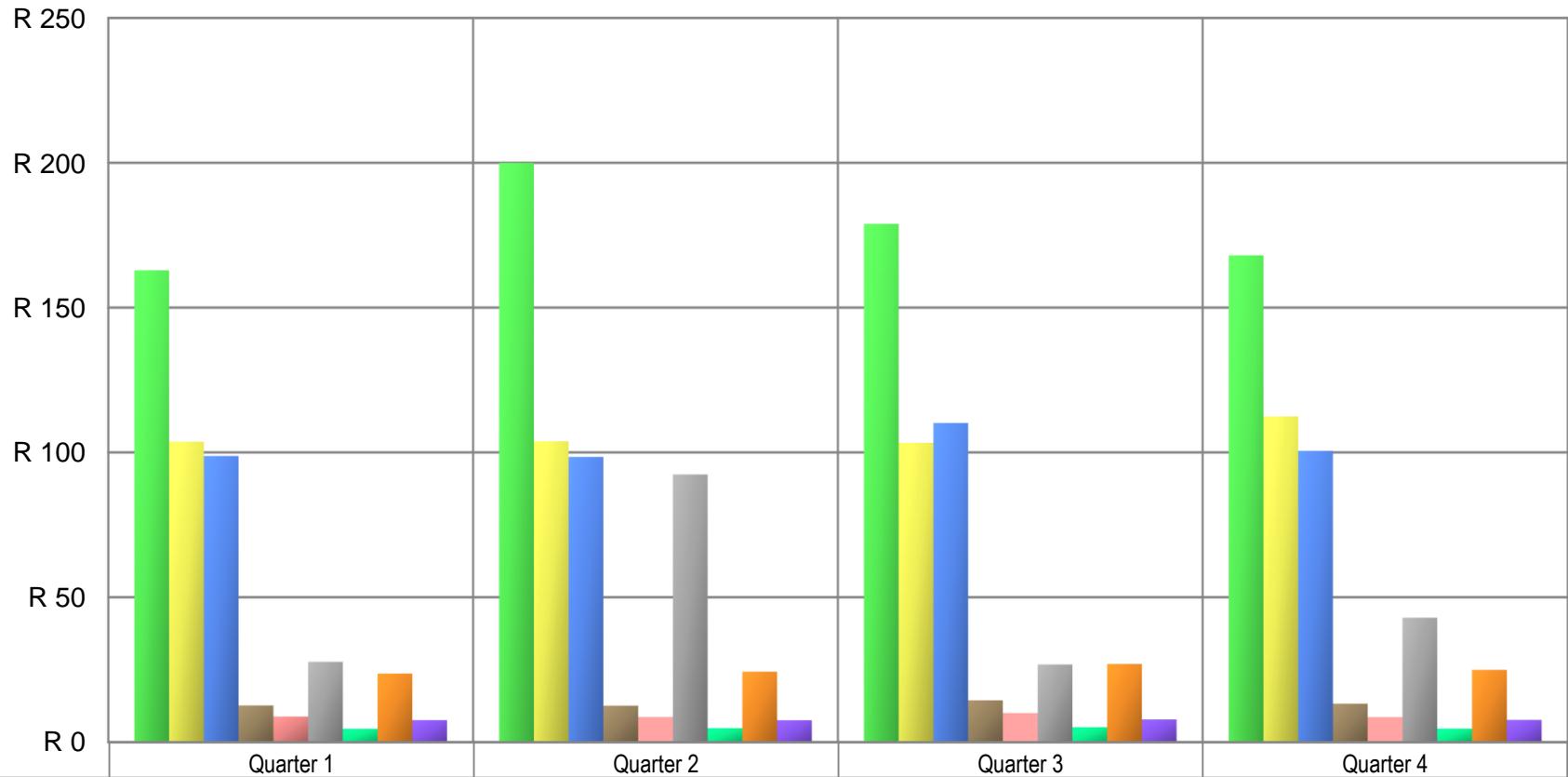


Total taxes/levies: R 2 770 743 912

# Quarterly casino taxes/levies - FY2016, Qrt 1, 2, 3 & 4

Gambling tax levied and collected by PLAs

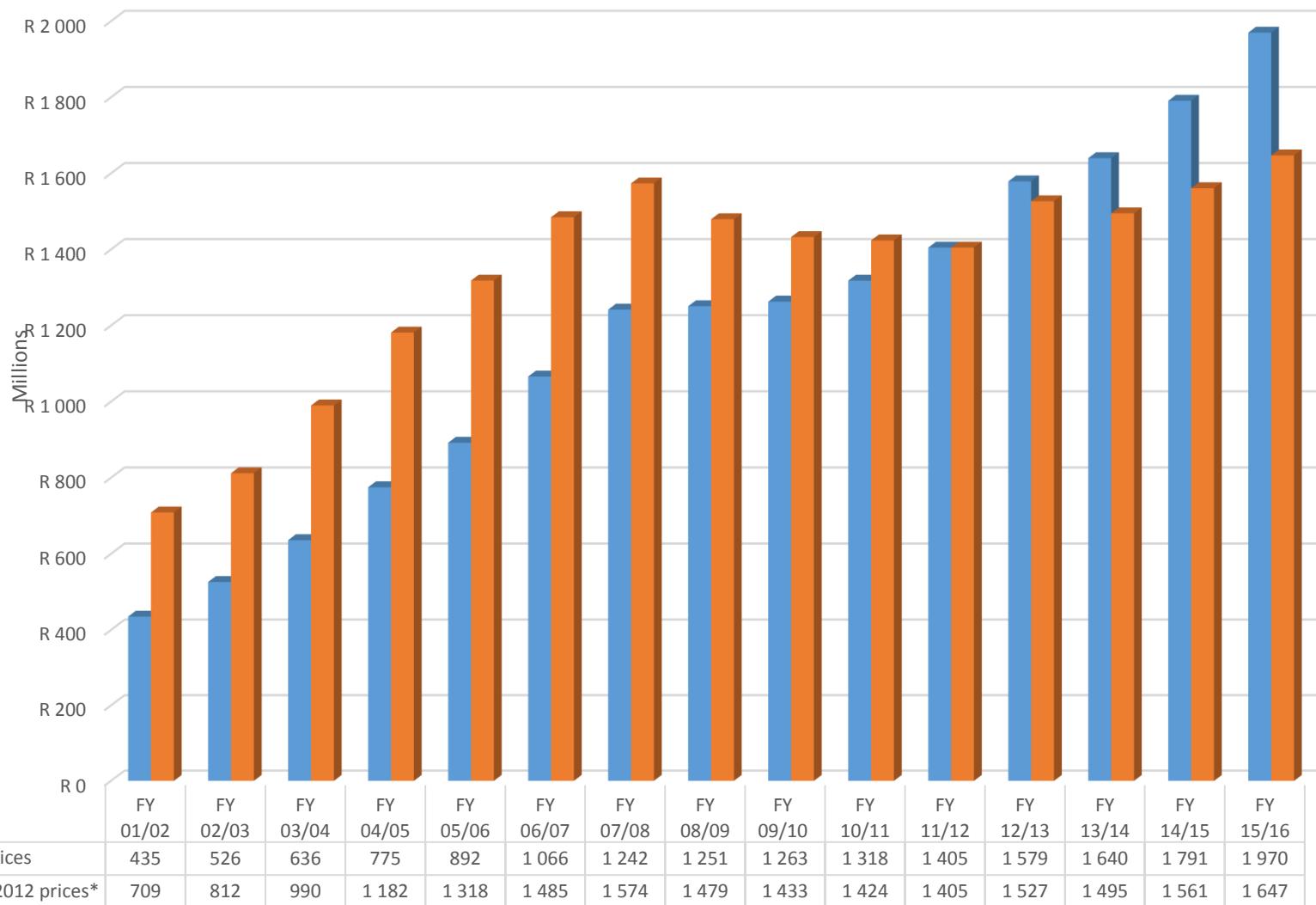
Millions



Province	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Gauteng	R 162 870 392	R 200 012 892	R 178 919 191	R 168 049 656
Western Cape	R 103 717 635	R 103 884 268	R 103 332 340	R 112 432 118
KwaZulu-Natal	R 98 759 328	R 98 473 533	R 110 167 827	R 100 548 735
Mpumalanga	R 12 651 033	R 12 578 528	R 14 422 206	R 13 248 301
Limpopo	R 8 840 122	R 8 664 409	R 10 021 904	R 8 613 919
North West	R 27 699 253	R 92 404 289	R 26 778 285	R 42 938 635
Northern Cape	R 4 596 634	R 4 798 416	R 5 149 509	R 4 643 882
Eastern Cape	R 23 676 138	R 24 325 768	R 26 995 515	R 24 937 671
Free State	R 7 589 619	R 7 554 637	R 7 804 248	R 7 658 410

# Trend in casino, taxes/levies – FY2001/02 to FY2015/16

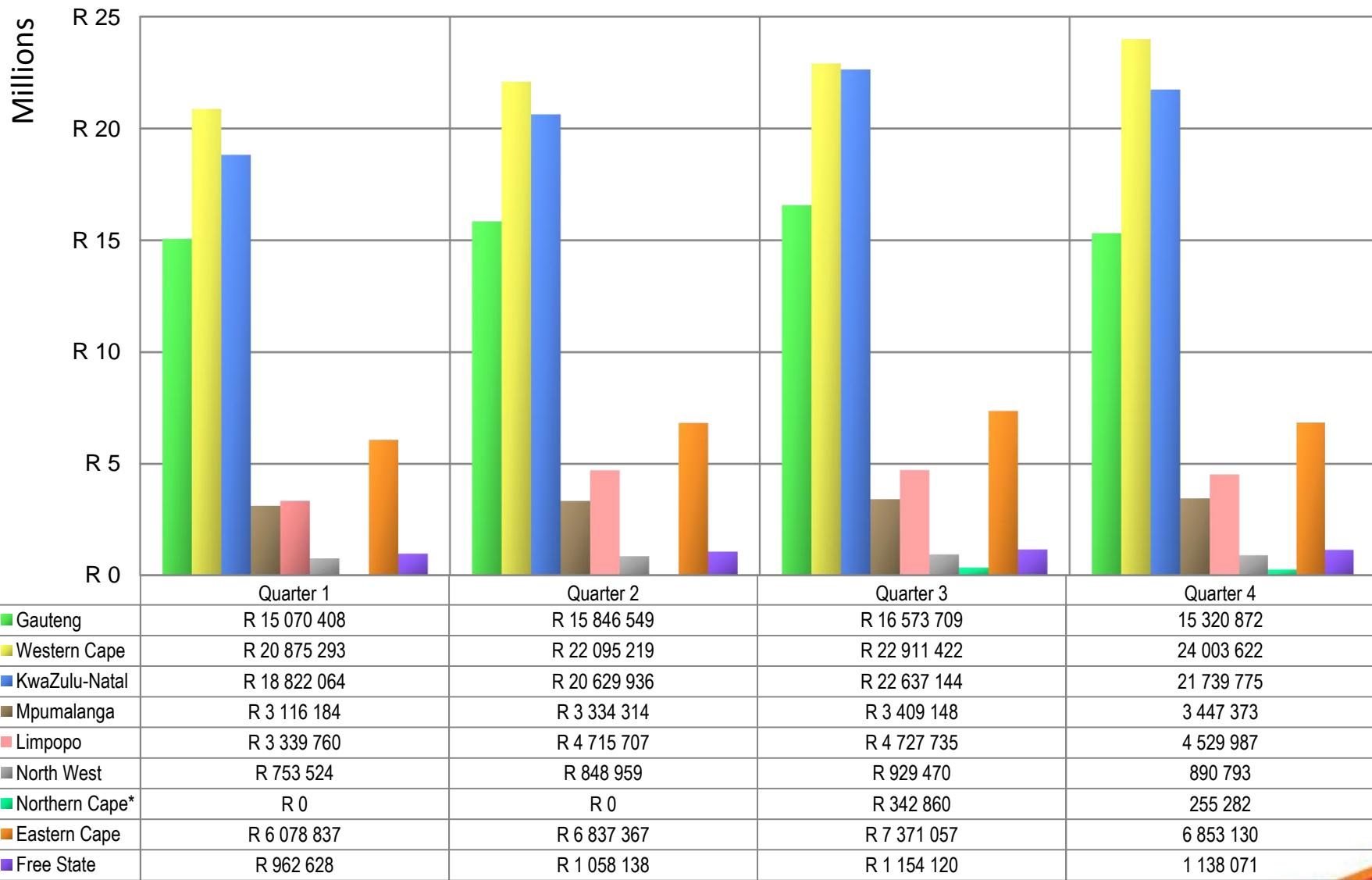
Gambling tax levied and collected by PLAs



2012 constant prices, Reserve Bank

# Quarterly LPM taxes/levies - FY2016, Qrt 1, 2, 3 & 4

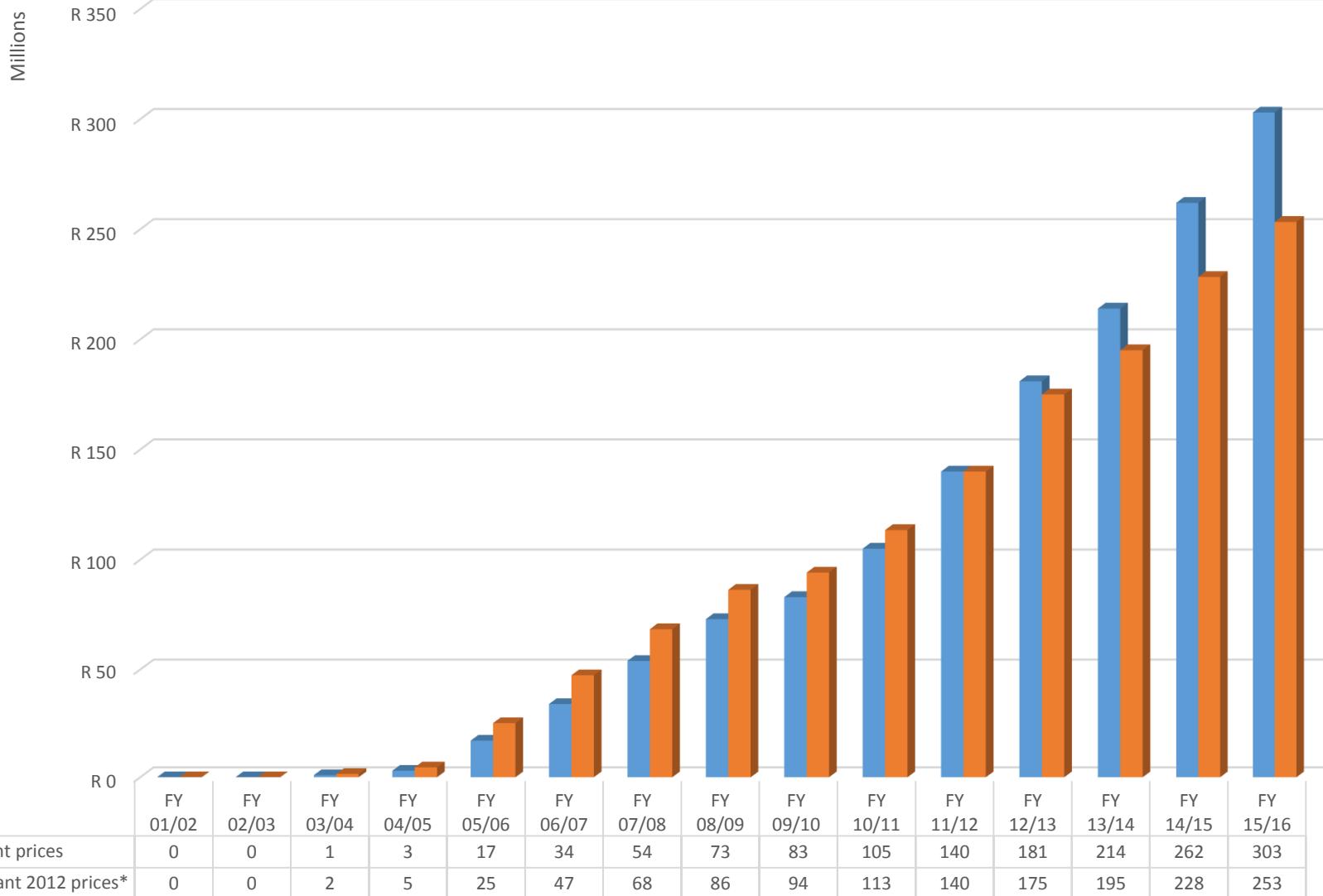
Gambling tax levied and collected by PLAs



\* LPMs not yet rolled out in Northern Cape

# Trend in LPM taxes/levies – FY2001/02 to FY2015/16

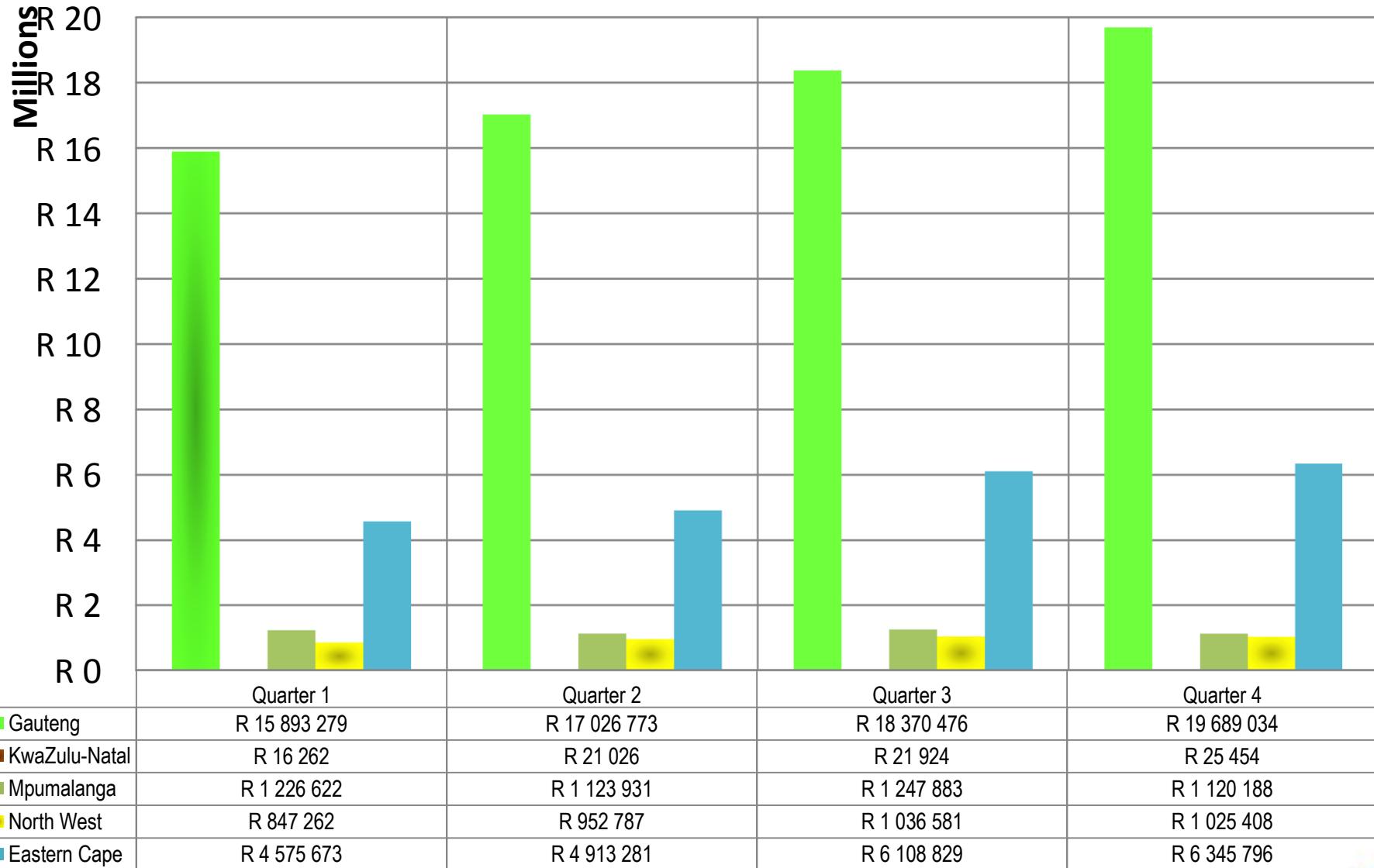
Gambling tax levied and collected by PLAs



2012 constant prices, Reserve Bank

# Quarterly bingo taxes/levies - FY2016, Qrt 1, 2, 3 & 4\*

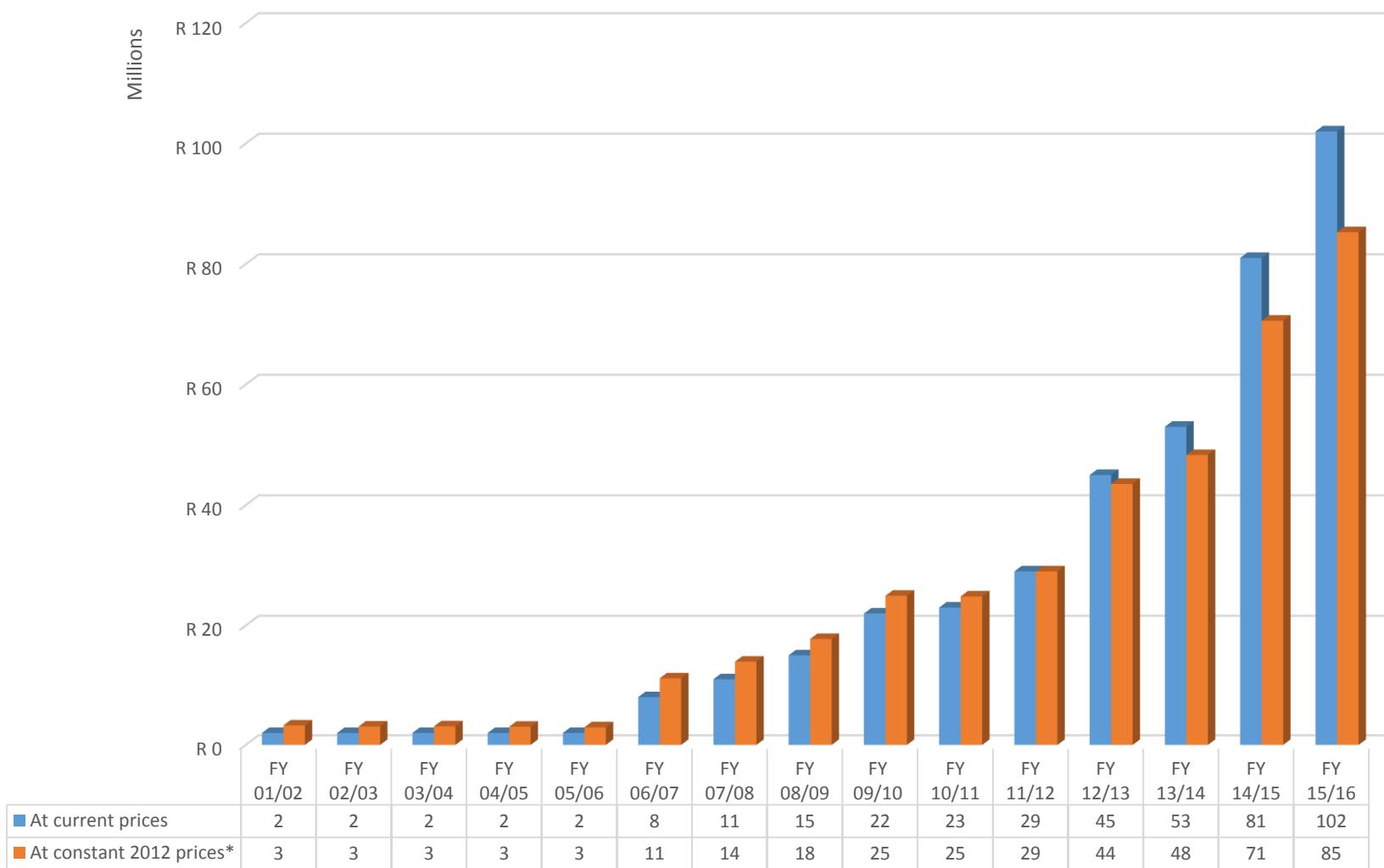
Gambling tax levied by and collected by PLAs



- Bingo offered for play in Gauteng, Mpumalanga, North West, Eastern Cape and KwaZulu-Natal only
- KZN statistics too low to be visible in graph

# Trend in bingo taxes/levies – FY2001/02 to FY2015/16

Gambling tax levied by and collected by PLAs



2012 constant prices, Reserve Bank

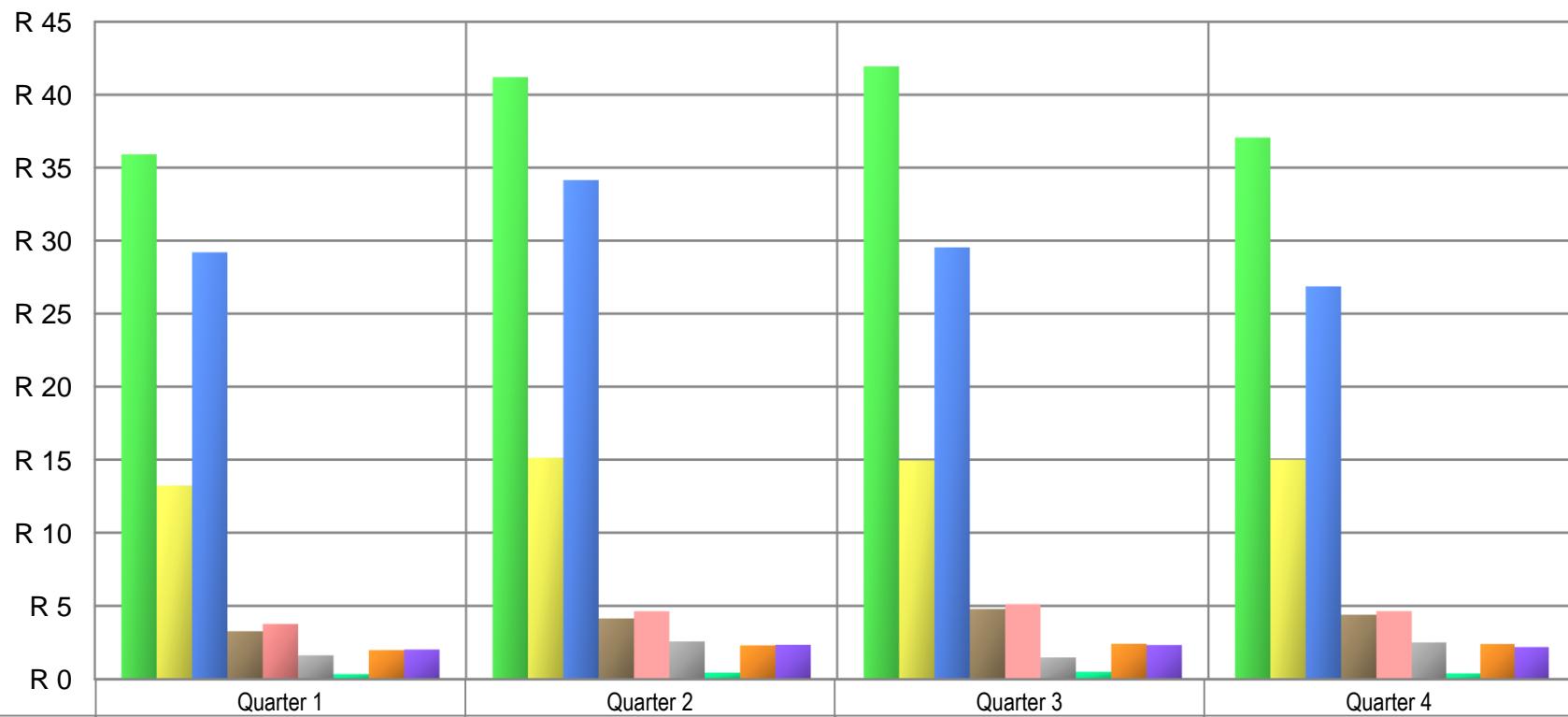
\* Bingo statistics represents bingo offered for play in Gauteng, Mpumalanga, North West, KwaZulu-Natal and Eastern Cape only

# Quarterly betting taxes/levies – FY2016 Qrt 1, 2, 3 & 4

## Bookmakers & Totalisators

Gambling tax levied and collected by PLAs

Millions



Gauteng

Western Cape

KwaZulu-Natal

Mpumalanga

Limpopo

North West

Northern Cape

Eastern Cape

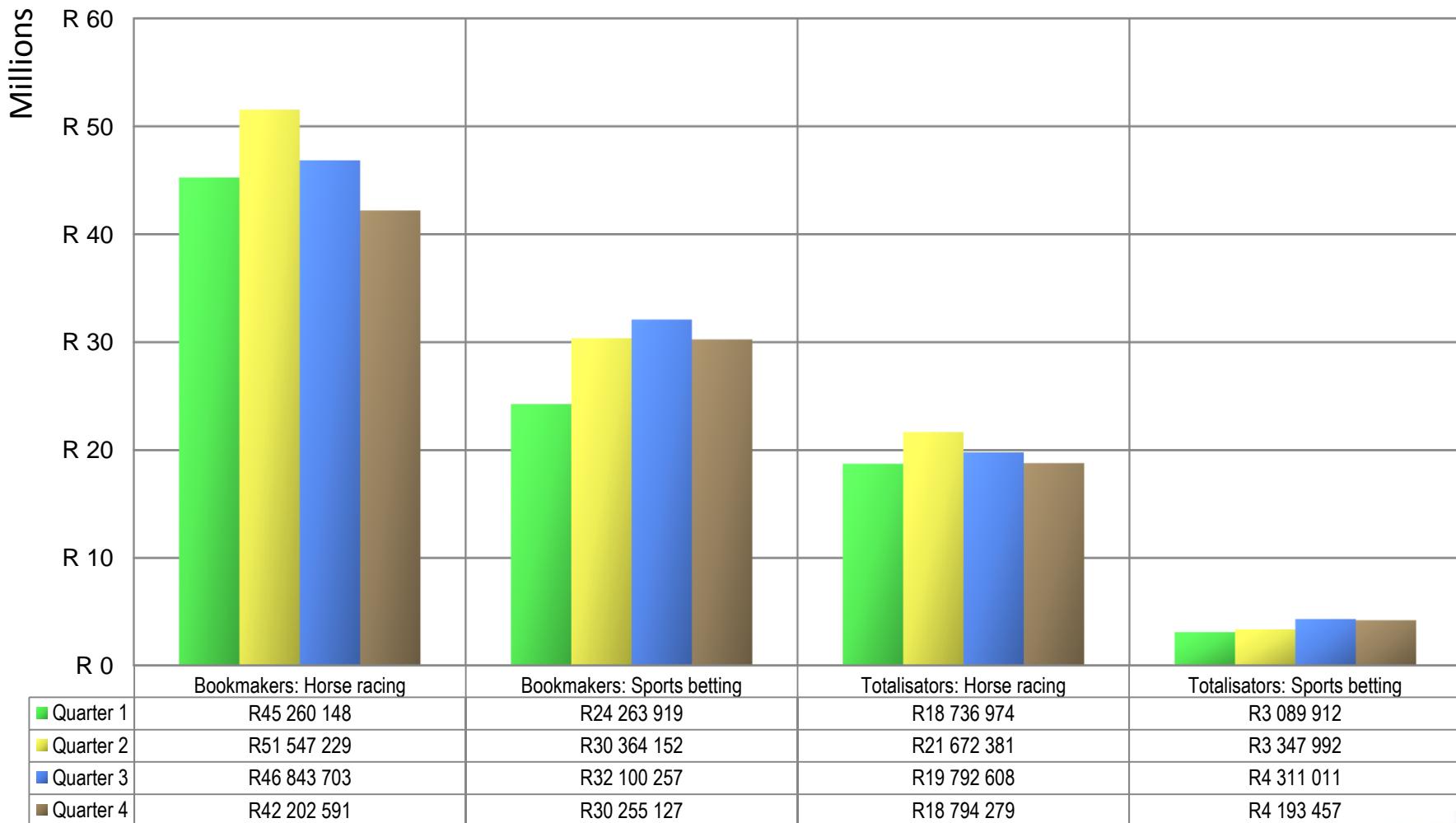
Free State

# Quarterly betting taxes/levies – FY2016, Qrt 1, 2, 3 & 4

## Split between Bookmakers & Totalisators

### Betting on horse racing & sport

Gambling tax levied and collected by PLAs

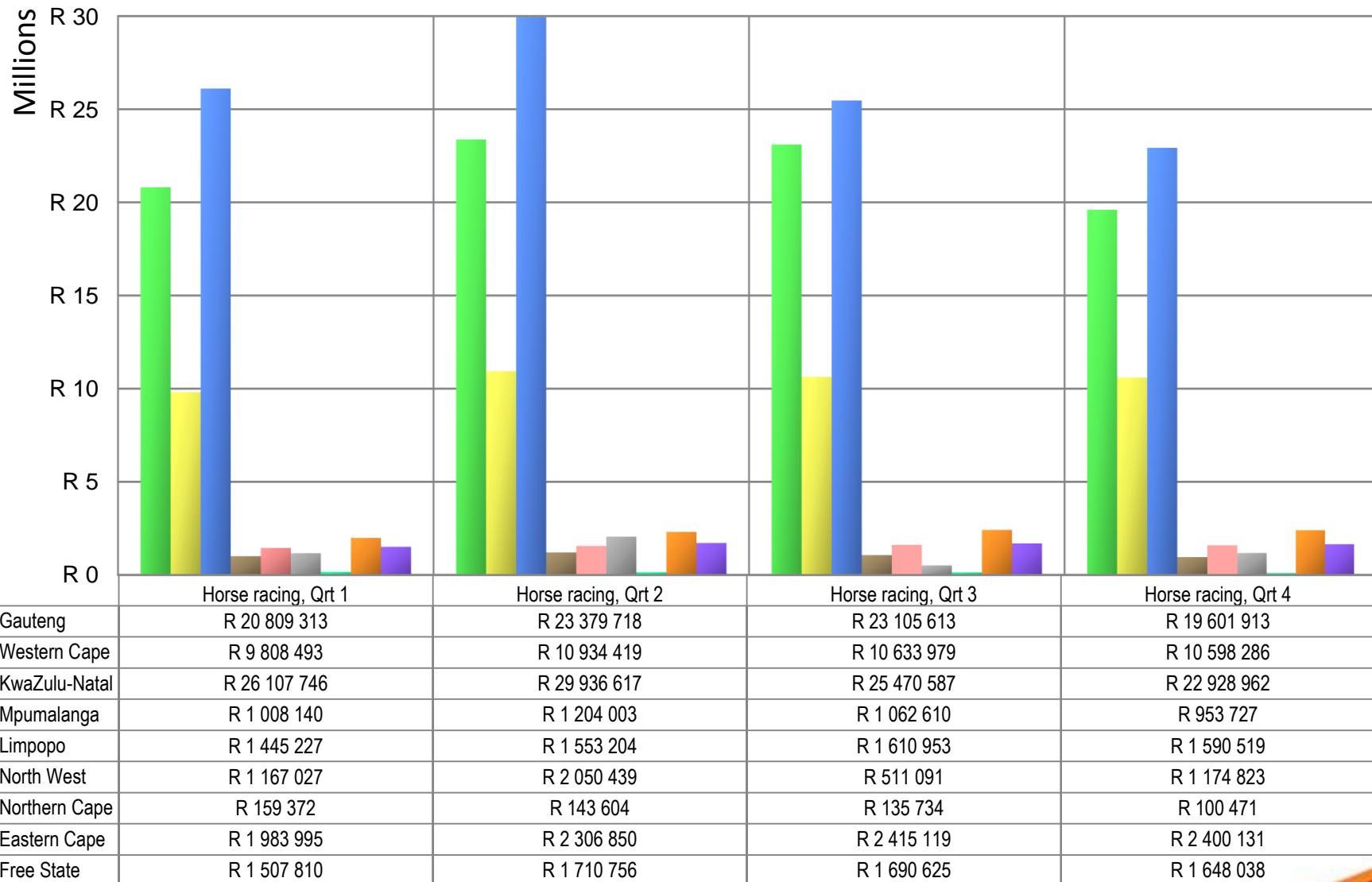


\* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

# Quarterly betting taxes/levies – FY2016, Qrt 1, 2, 3 & 4

## Betting on horse racing\*

Gambling tax levied by and collected by PLAs

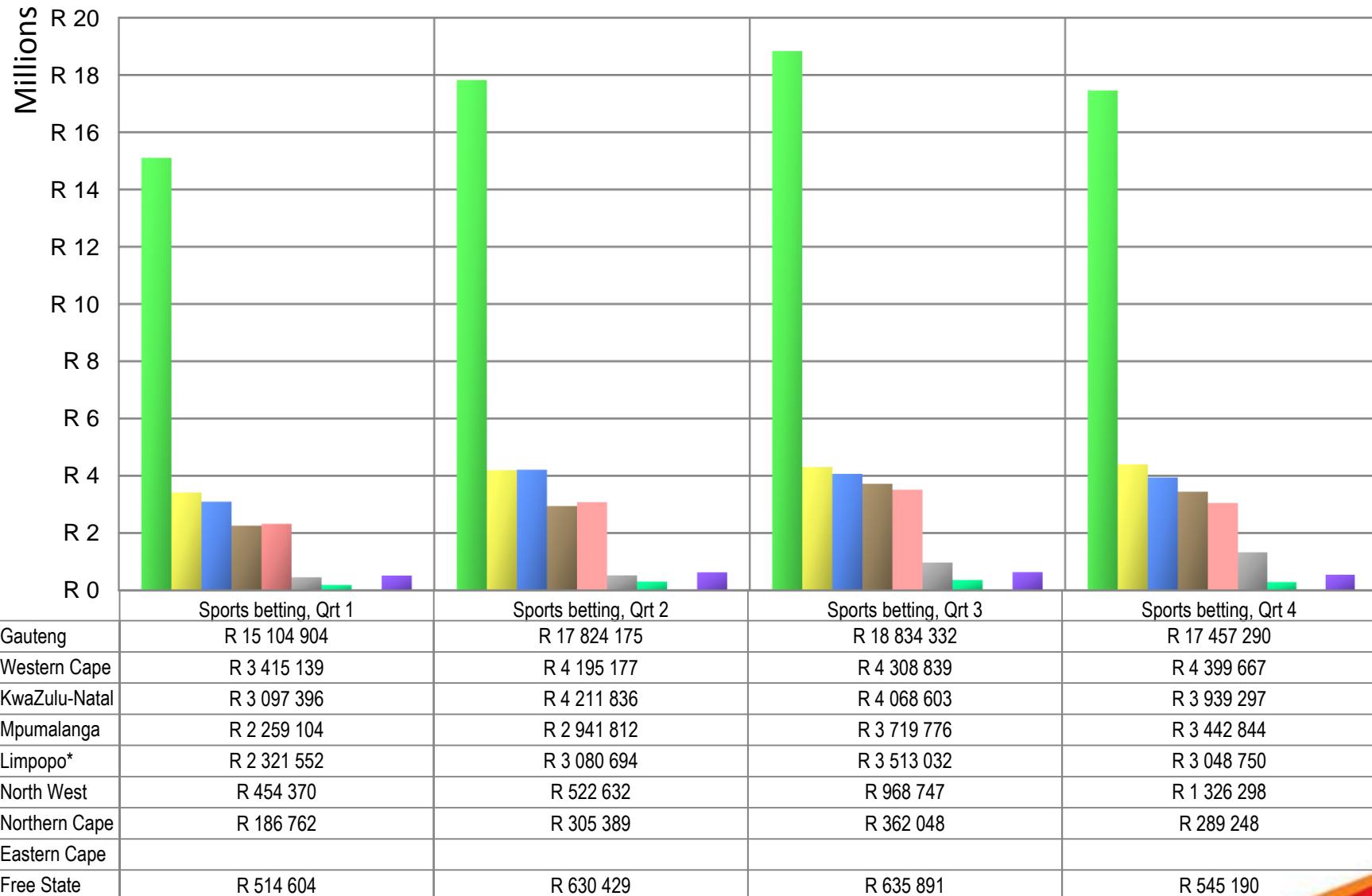


\* Eastern Cape: Statistics includes sports betting

# Quarterly betting taxes/levies – FY2016, Qrt 1, 2, 3 & 4

## Betting on sport\*

Gambling tax levied and collected by PLAs



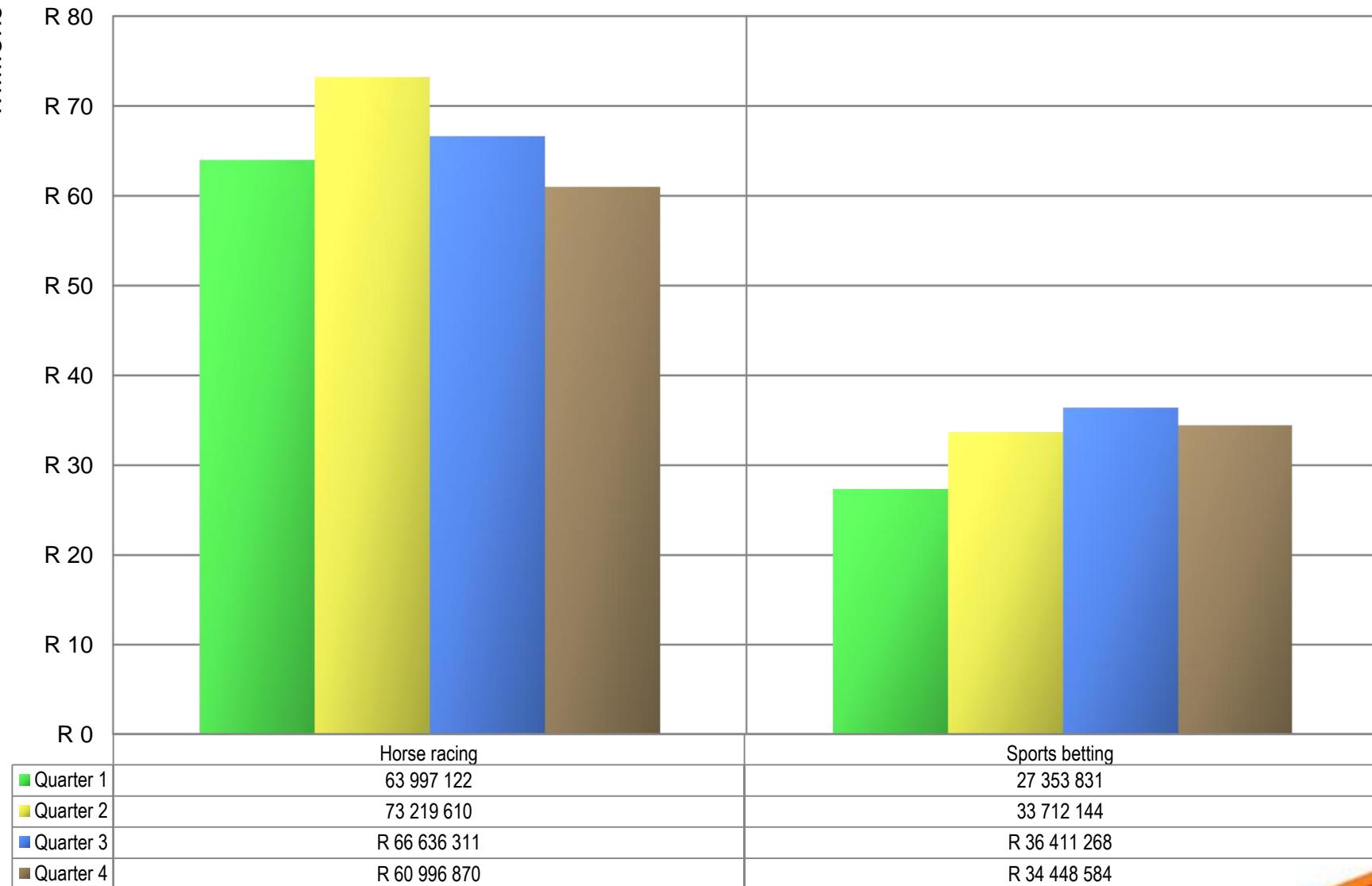
\* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

# Quarterly betting taxes/levies – FY2016, Qrt 1, 2, 3 & 4

## Split between betting on horse racing & sport

Gambling tax levied and collected by PLAs

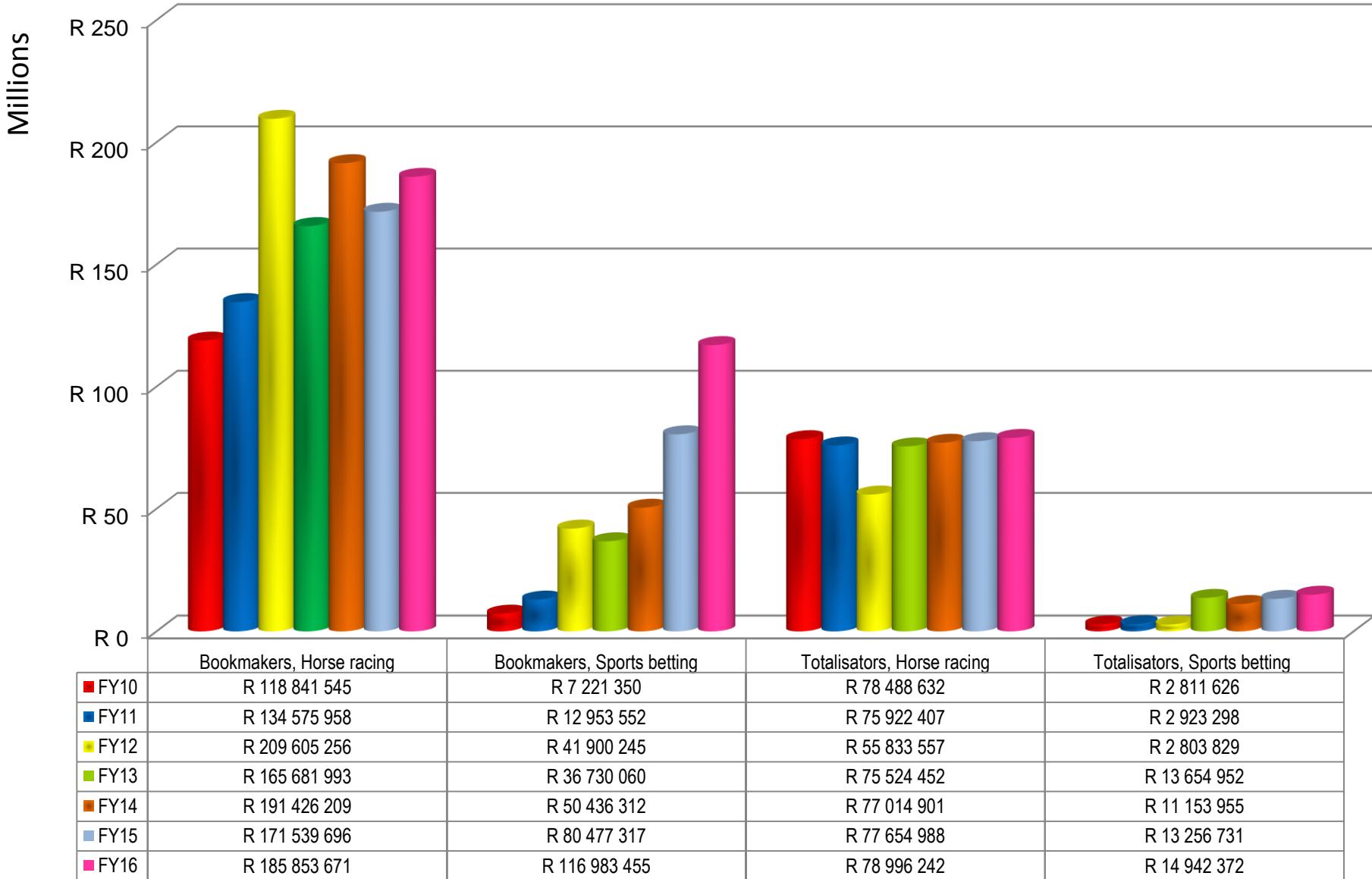
Millions



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

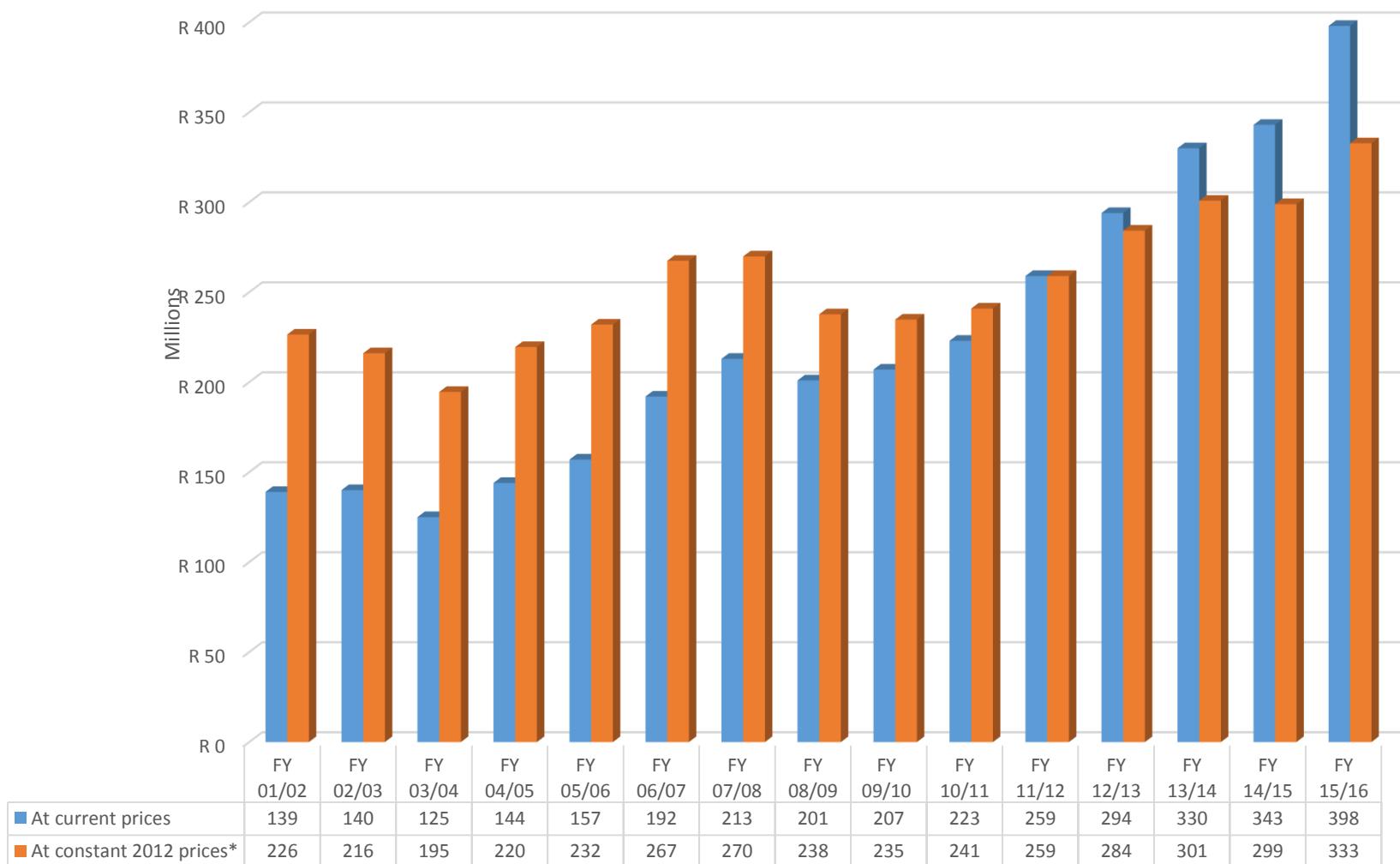
# Trend in taxes/levies, bookmakers & totalisators, FY2010 to FY2016

Gambling tax levied and collected by PLAs



# Trend in betting taxes/levies – FY2001/02 to FY2015/16

Gambling tax levied and collected by PLAs

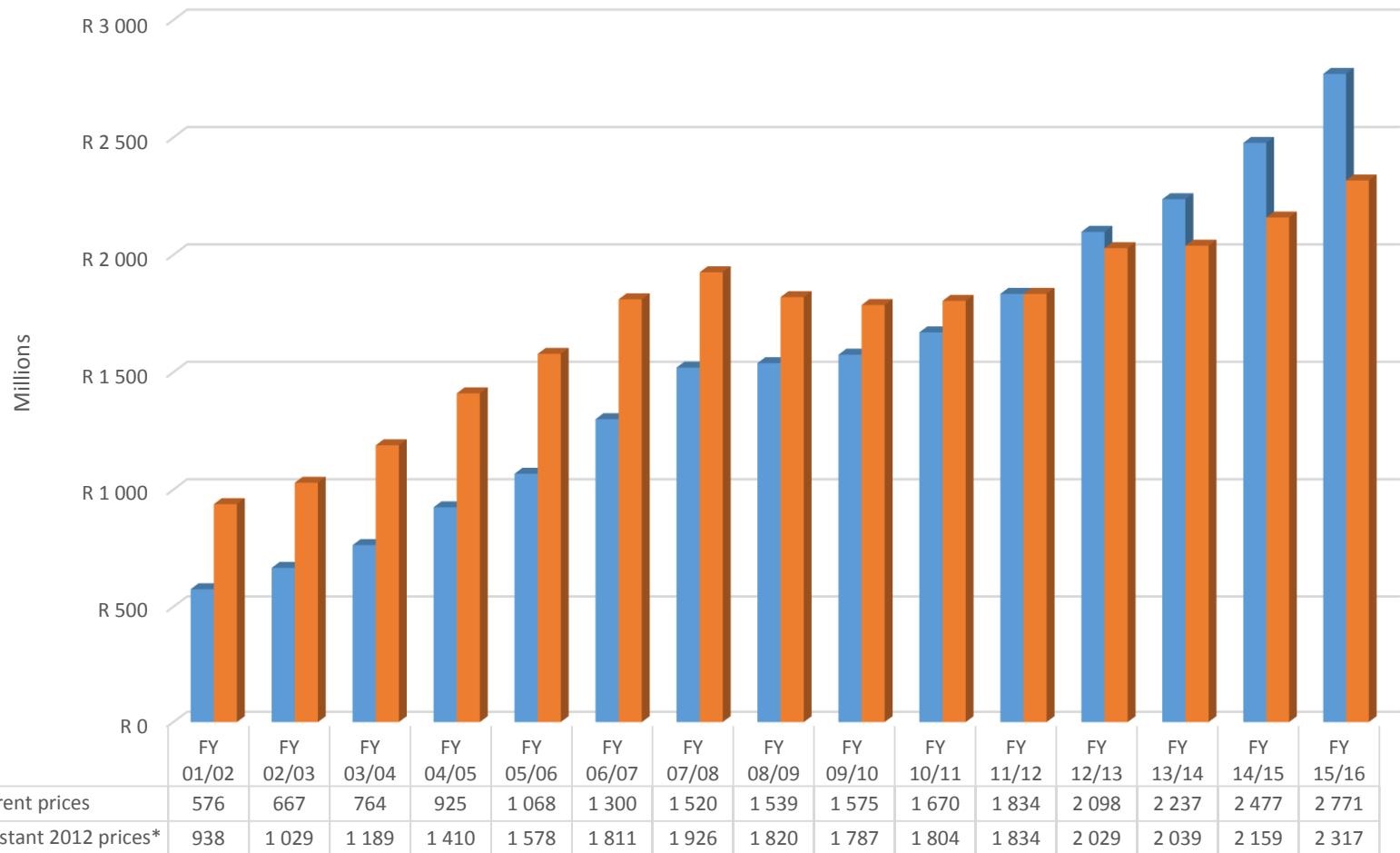


2012 constant prices, Reserve Bank

# Trend in taxes/levies – FY2001/02 to FY2015/16

## (all modes and provinces)

Gambling tax levied and collected by PLAs



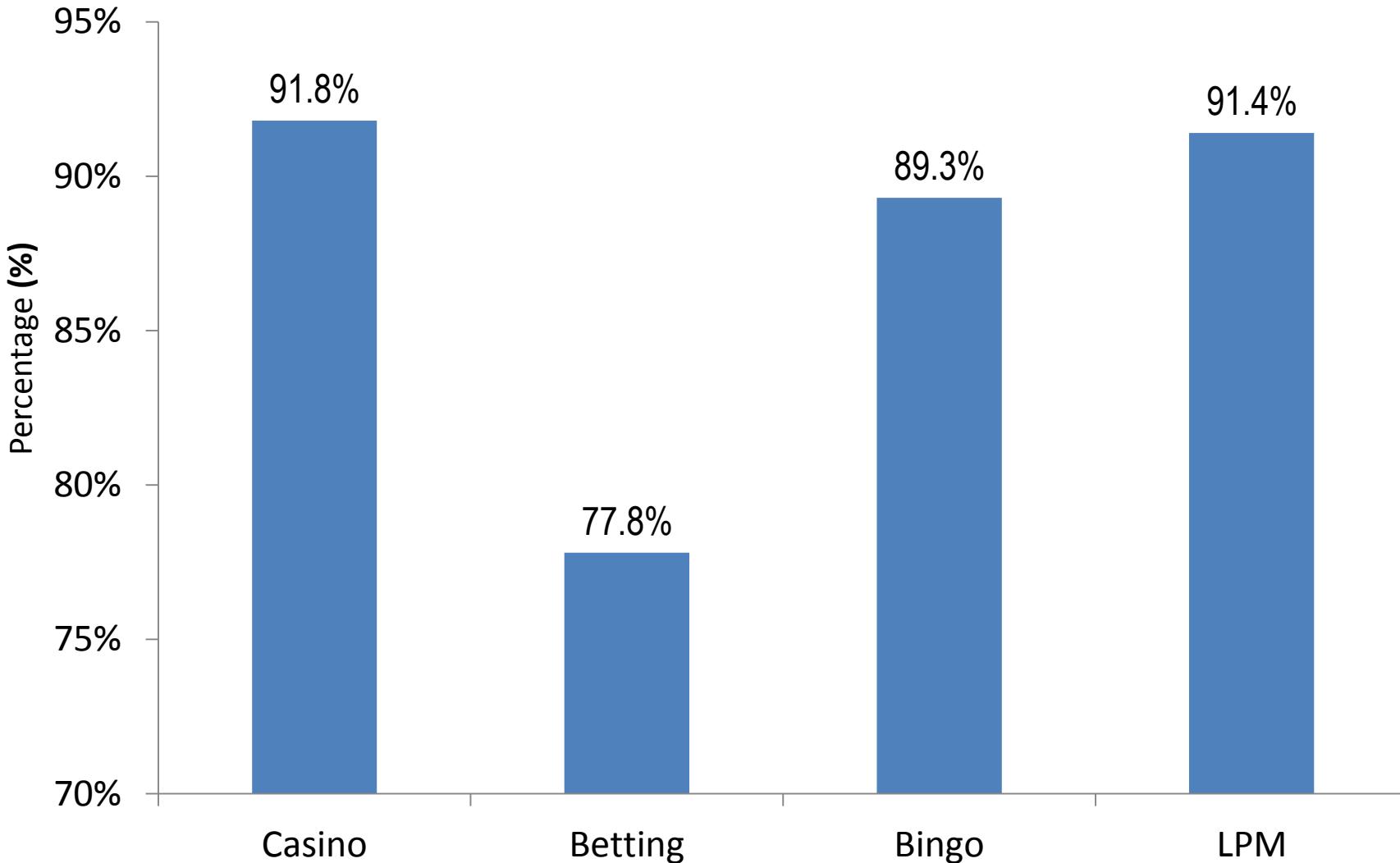
2012 constant prices, Reserve Bank

# **Summary : Taxes/Levies**

- Taxes/levies increased by 6.6% from R2,1 billion in FY13 to R2,2 billion in FY14, by 10.7% to R2,5 billion in FY15, and by 11.9% to R2,8 billion in FY16.
- A total amount of R 2 770 743 912 was collected during FY16, Quarters 1, 2, 3 & 4.
- During FY16 (Quarters 1, 2, 3 & 4), at 71.1%, casinos contributed the highest amount of taxes/levies paid by comparison with other gambling modes.
- At 36.1% Gauteng accounts for the highest amount of taxes/levies paid compared to all other provinces.

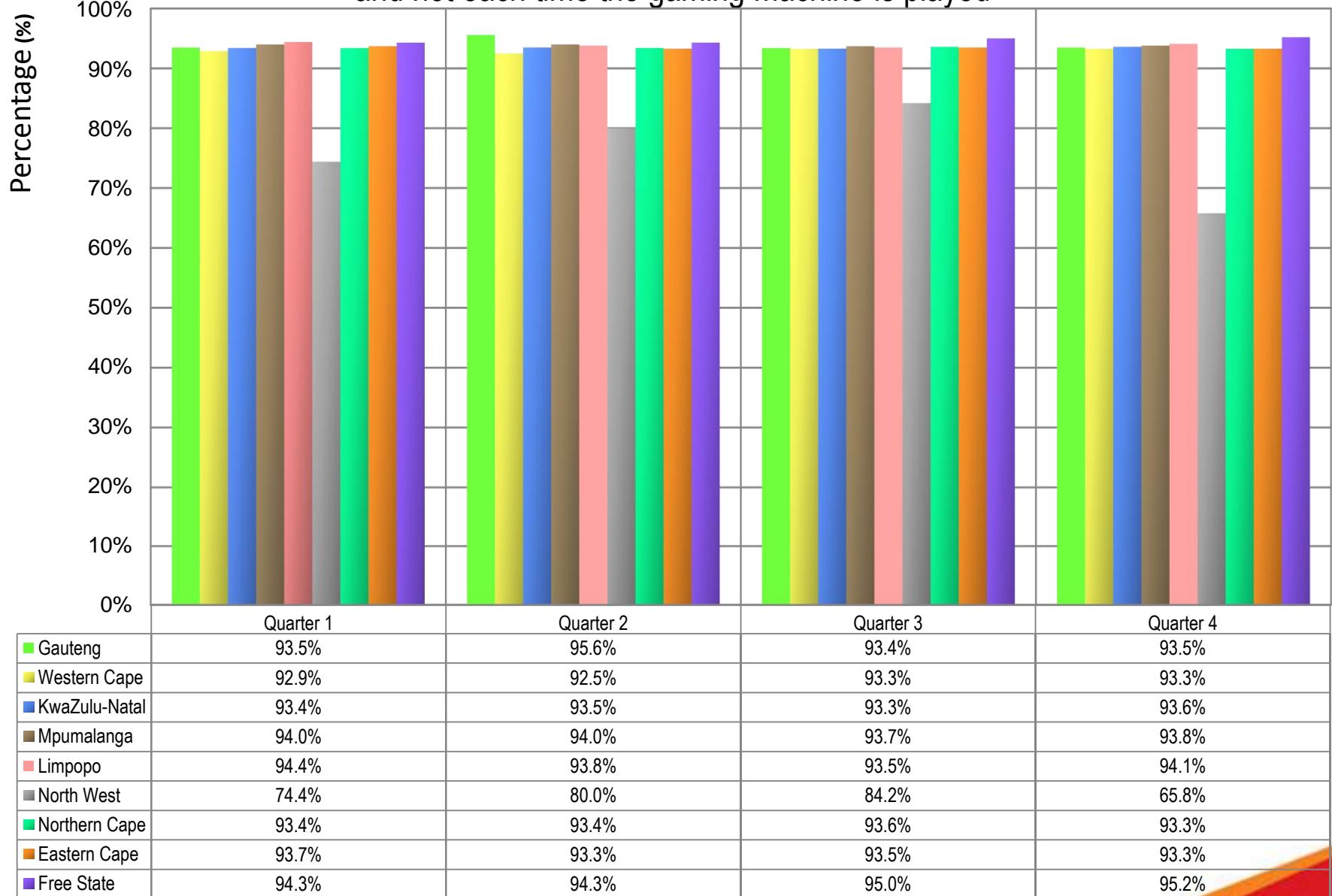
# Average RTP % per gambling mode – FY2016

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 % - FY2016

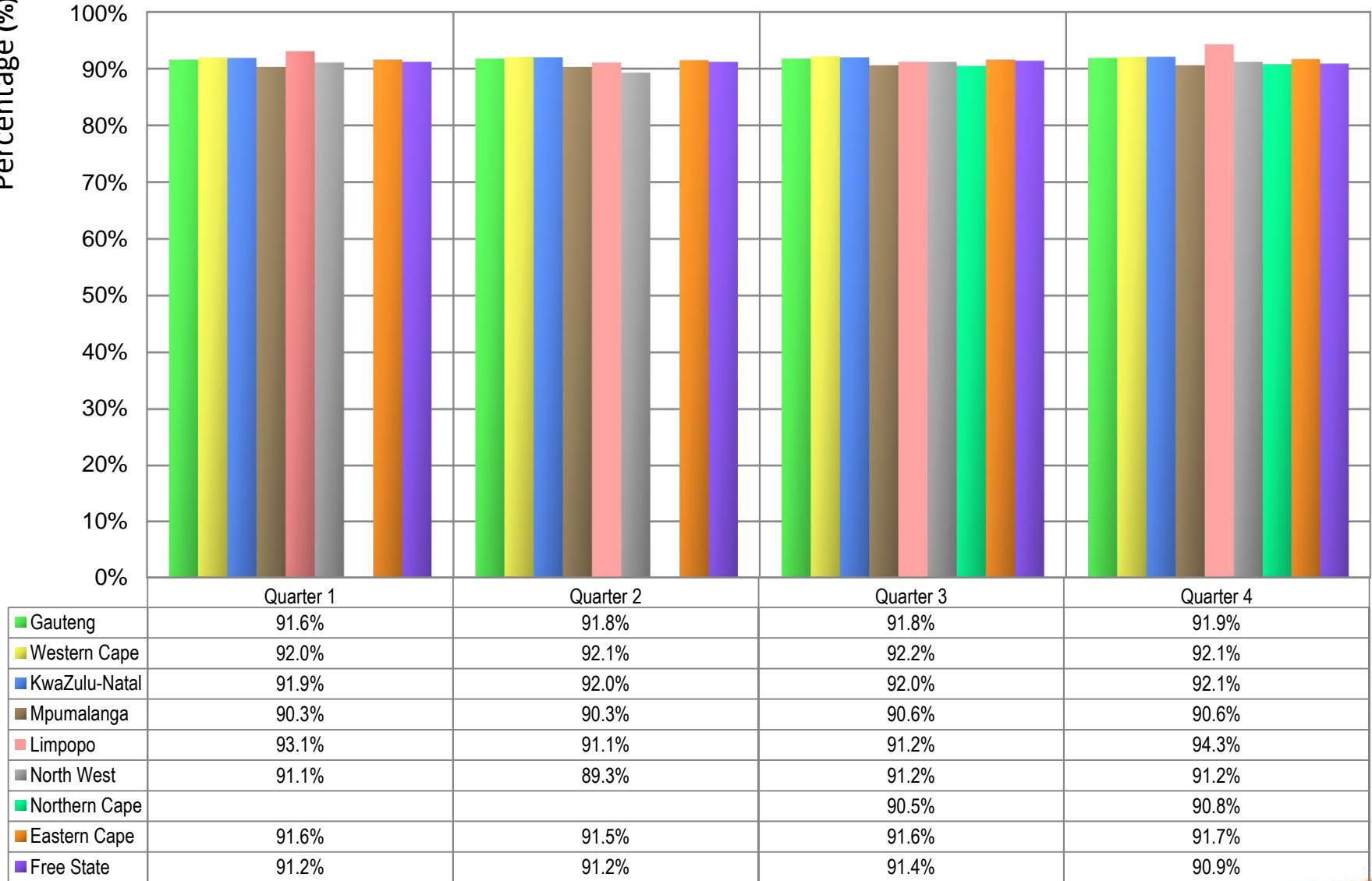
Return to Player is an average achieved over a significant number of game plays\*  
and not each time the gaming machine is played



# Quarterly LPM RTP % - FY2016

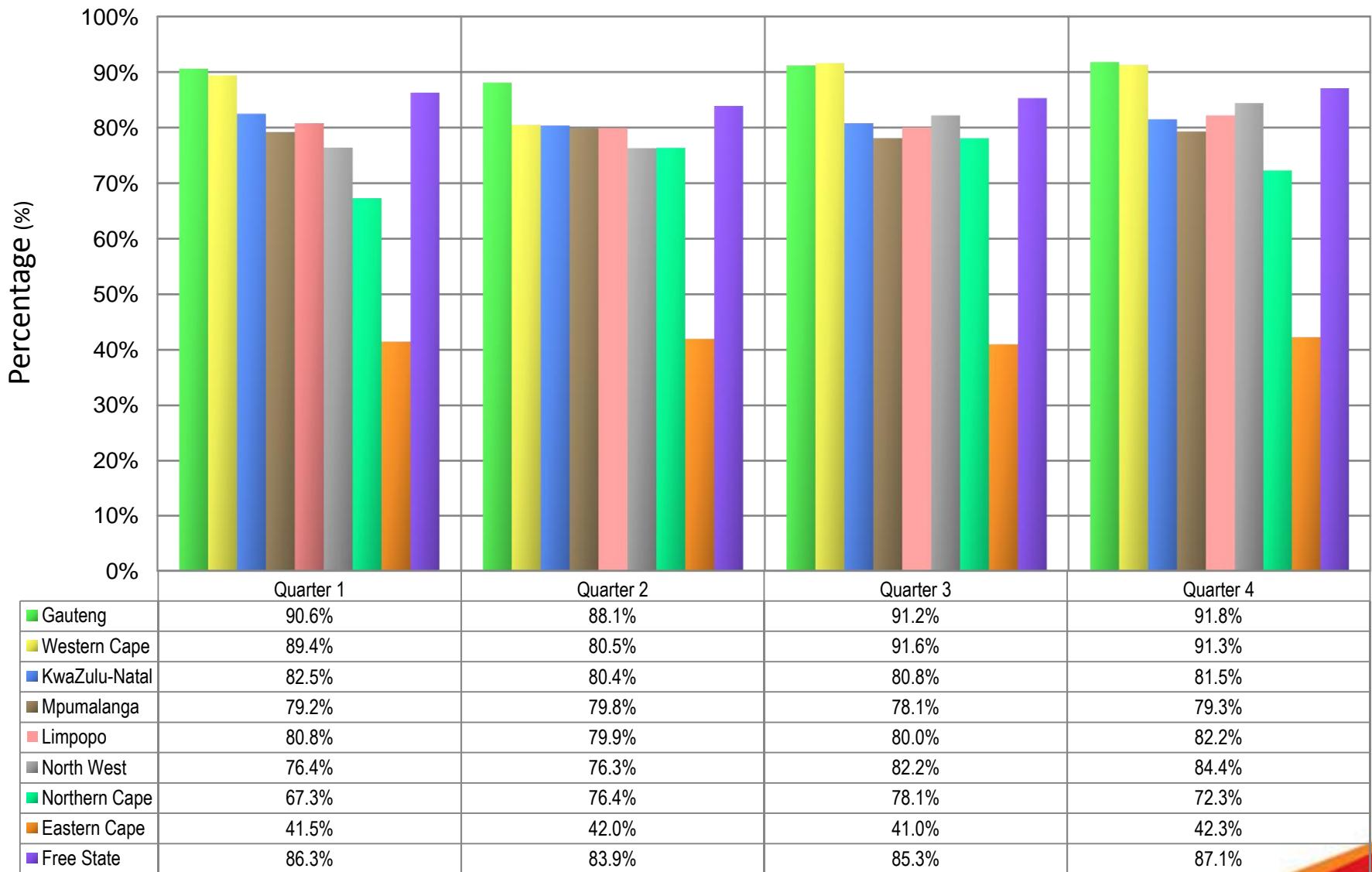
Return to Player is an average achieved over a significant number of game plays\*  
and not each time the gaming machine is played

Percentage (%)



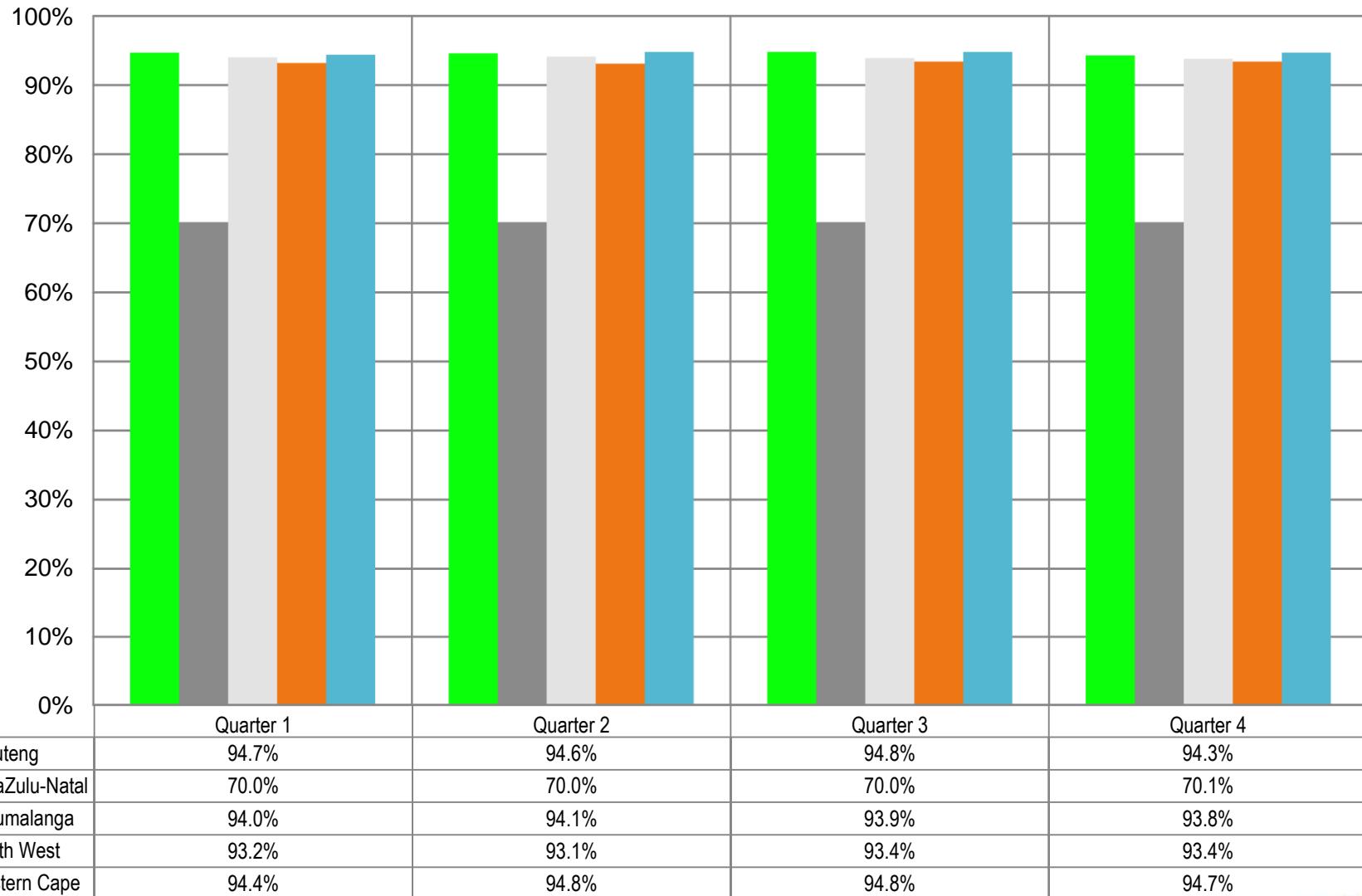
# Quarterly betting RTP % - FY2016

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 % - FY2016\*

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, North West, Eastern Cape and KwaZulu-Natal only

# Conclusion

The trend in real GGR for all modes of gambling, accounting for changes in inflation, grew faster than inflation between FY02 and FY08. However, between FY08 and FY10, gambling revenues from casino's decreased. This coincides with the Global Financial Crises which had ripple effects on the South African economy and resulted in negative growth and loss of jobs and resultantly a cut in consumption expenditure. From FY10 however, the trend in GGR has increased at a slow grow rate by 5.5% in FY16.

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National Gambling Board

*South Africa*

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