



# Media Briefing

## Survey of Casino Entertainment in South Africa 2016

Adv. Themba Ngobese

**casa**

Casino Association  
of South Africa

# Who is CASA?

- CASA represents the interests of the **R18,2 billion** casino industry in South Africa
- **36** out of 38 legal casino operations
- We champion good governance and play a positive, constructive role in the development of good public policy



# Why do we conduct this survey?

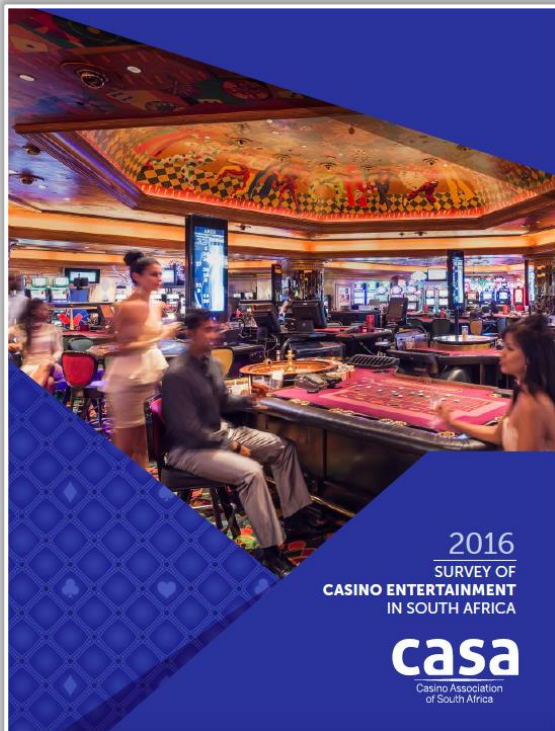


To provide insight and understanding about the vital role our members play in the SA economy



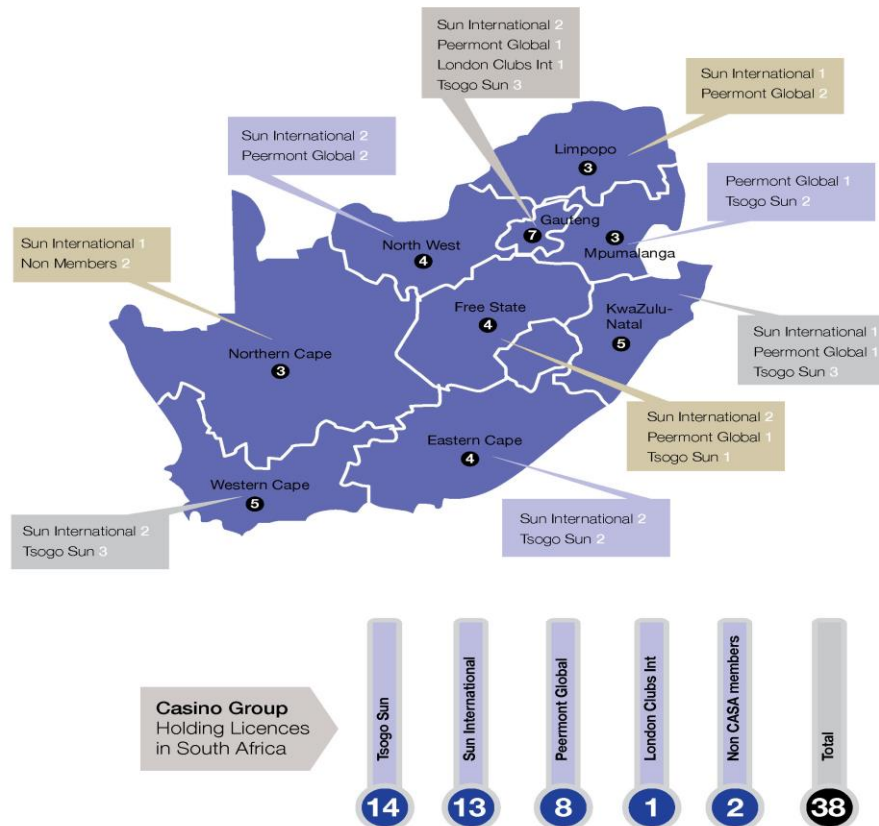
To provide research based data to inform public policy about the industry

# The Survey of Casino Entertainment in South Africa 2016



11<sup>th</sup> year of this survey

# Location of legal casinos in SA





# National Gambling Revenue: Members

## Survey Findings



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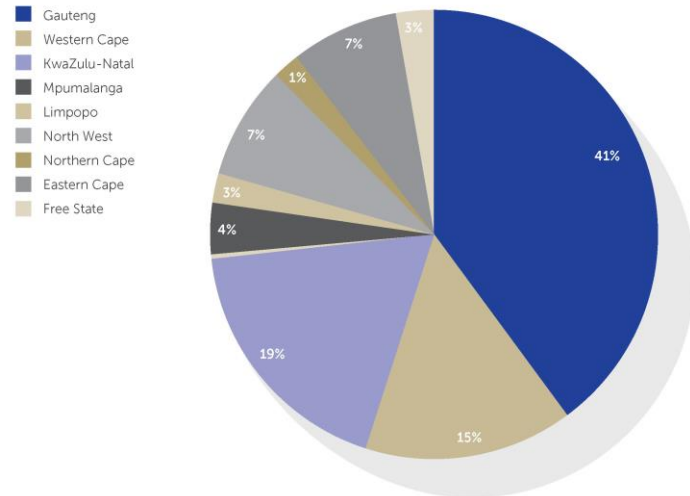
# Gross Gambling Revenue Statistics

6,7%

Member National GGR in 2015/16 **R18,2 billion**

- Gauteng has seven legal operating casinos and is the biggest contributor towards GGR
- Growth of 5,5% in Gauteng, compared to 2,4% in 2014/15
- Biggest growth experienced in Limpopo (28,6%) and North West (25,1%)
- Free State back in positive growth figures 8,4% after recording -2,5% growth in 2014/15

Provincial split of GGR



# CASA Member Tax Contribution

Survey Findings



# Total tax contribution – R5,9 billion in 2015/16



3,3%

CASA members contributed **R5,9 billion** in various taxes/levies

**36%**

Of the value generated by CASA members goes towards taxes



**R1,8 billion** to provincial gambling regulators  
**R2 billion + R1,1 billion** to national treasury +  
**R1 billion split between local municipalities & national treasury**

# Gauteng casinos pay the most gambling taxes/levies & VAT – R1.5 billion

- KZN contributes **R767 million**
- Western Cape contributes **R711 million**
- North West contributes **R267 million**
- Eastern Cape contributes **R232 million**

# Who wins?

## Survey Findings



# Up 7,6% in value add from 2014/15

**R16,4  
billion**

value generated by  
CASA members

**20%**

distributed to  
employees

**36%**

distributed to  
government

**56%**



# Capital expenditure has also increased

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**R2,4 billion**  
in capital expenditure

**13,2% of GGR**

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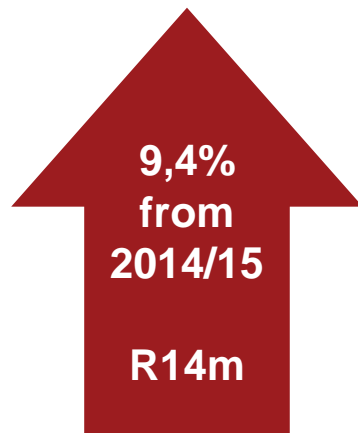
## **Compliance costs have also increased**

**Compliance costs increased by 6.6%  
to R74,5 million from R69,9 million  
in 2014/15**

**0,41% of GGR**

# Spend in education has increased by 26%

**R165  
million  
contributed  
towards CSI**



Education increased by 26% to over  
**R70 million**

**R35 million**  
towards community development

**R23 million**  
towards health and welfare

**R11 million**  
towards sports, arts & culture

**R17,1 million**  
towards the SARGF



**R8 million**  
towards other CSI projects

# B-BBEE

## Survey Findings



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# Clarity around B-BBEE is welcomed by the industry

**25%**

of member casinos  
are Level 1

**30%**

of member casinos  
are Level 2

**2,73**

is the average  
B-BBEE rating

# Regulatory environment could be a roadblock to the industry's success

**We advocate for fair policy to support the industry's growth.**

- **Regulatory concerns:**
  - 41 casino licence
  - Top heavy regulation = high costs are borne by the industry
  - Rapid rollout of Electronic Bingo Terminals (“EBTs”) without a national regulatory framework
    - Unlimited Bingo licenses
    - Unlimited number of EBTs etc.
  - Flourishing illegal gambling especially online gambling
  - Further regulatory intervention in the context of:
    - Advertising relating to gambling
    - Additional liquor regulations

# THANK YOU

To download the  
survey please visit:  
[www.casasa.org.za](http://www.casasa.org.za)



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**QUESTIONS**



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