



National Gambling Board
South Africa
a member of the sbsi group

National Gambling Statistics

**Casinos, Bingo, Limited Pay-out Machines and Betting on Horse Racing and Sport
offered by Bookmakers and Totalisators
[Based on audited data]**

**2016/2017 Financial Year (FY17) [Quarters 1, 2, 3 & 4]
1 April 2016 – 31 March 2017**

Quarter 1 = 1 April 2016 – 30 June 2016

Quarter 2 = 1 July 2016 – 30 September 2016

Quarter 3 = 1 October 2016 – 31 December 2016

Quarter 4 = 1 January 2017 – 31 March 2017

Introduction

- ❑ The National Gambling Board (NGB) is mandated by the National Gambling Act (NGA), 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 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 audited 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) 2017:
 - 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).
- ❑ FY2017 information in this report is based on audited data.
- ❑ The information in this report is applicable to the period of 1 April 2016 to 31 March 2017 (referred to as FY2017), whereas quarters are representative of the following specific periods:
 - Quarter 1: 1 April 2016 – 30 June 2016;
 - Quarter 2: 1 July 2016 – 30 September 2016;
 - Quarter 3: 1 October 2016 – 31 December 2016; and
 - Quarter 4: 1 January 2017 – 31 March 2017.
- ❑ 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 FY2017, as well as trends over time, based on audited data.

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 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

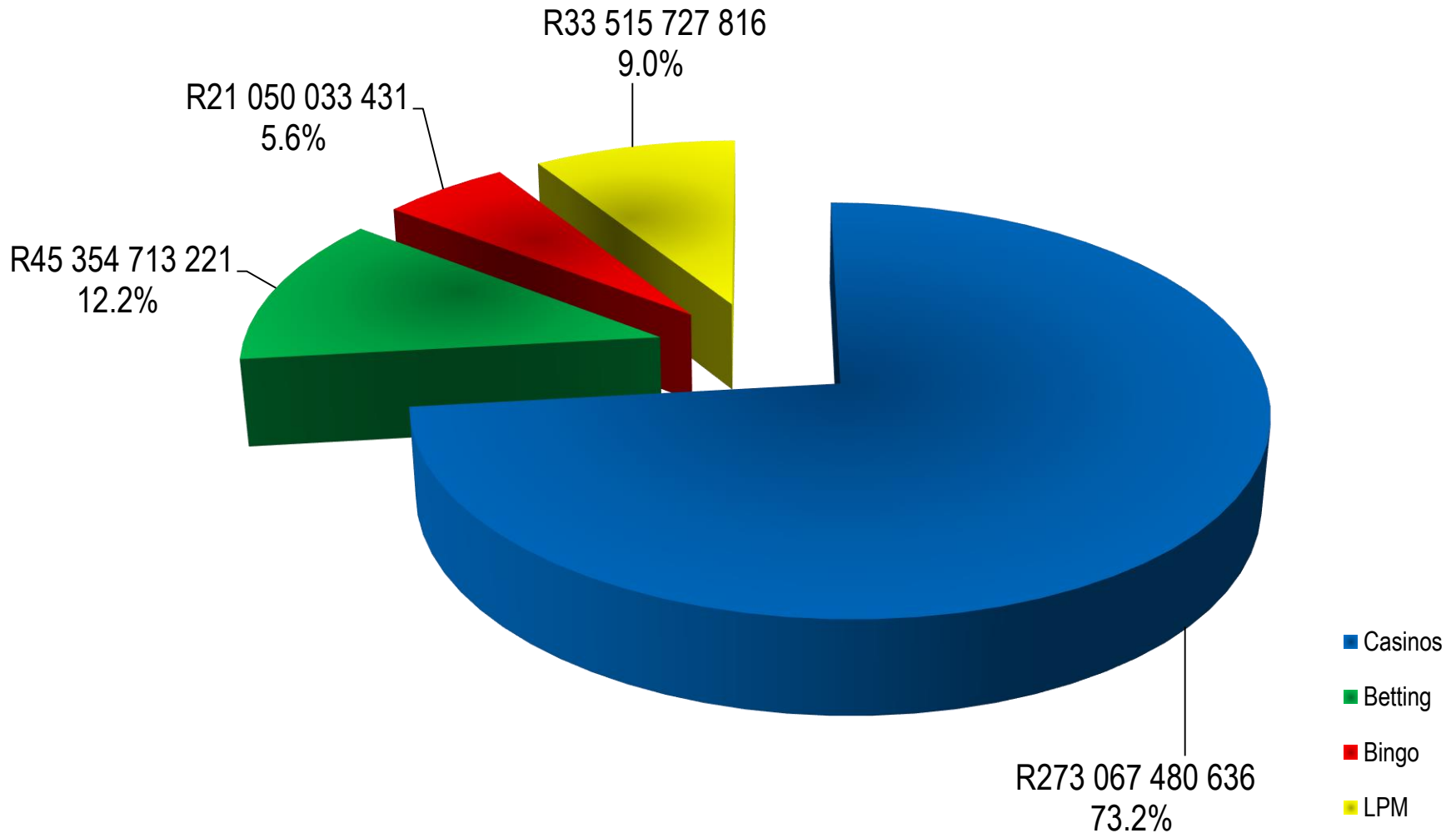
- ✓ GGR generated in the casino sector represented 66.4% of the total amount of GGR generated in FY2017 compared to the other legalised gambling sectors (betting on sport and horse racing, LPM & bingo). A 4.5% increase in GGR generated by the casino sector has been recorded for the period between FY2014 (R 16 497 594 915) to FY2015 (R 17 234 928 081), by 5.8% to FY2016 (R18 236 685 695), however, decreased by 1.8% to FY2017 (R 17 900 747 071) (*based on current prices*). The slight decrease in the generation of GGR from FY2016 to FY2017 can, amongst others, be attributed to the decrease of operational positions in Gauteng, Western Cape, Mpumalanga, Northern Cape, Eastern Cape and Free State.
- ✓ GGR generated in the betting on horse racing and sport sector represents 18.9% of the total amount of GGR generated in FY2017 compared to the other legalised gambling sectors (casino, LPM & bingo). Noticeable increases in GGR generated in the betting industry have been recorded i.e. an increase of 22.2% from FY2014 to FY2015, by 28.5% from FY2015 to FY2016, and by 14.3% from FY2016 to FY2017. This is mainly as a result of increases in the generation of GGR by bookmakers offering betting on sport. GGR generated by bookmakers offering betting on sport increased by 36.0% from FY2013 to FY2014, by 59.9% to FY2015, by 50.9% to FY2016, and by 22.0% to FY2017.
- ✓ GGR generated in the LPM sector represented 10.0% of the total amount of GGR generated by all licensed gambling modes in FY2017. Significant increases in GGR generated have been recorded in the LPM industry - by 19.6% from R1 738 648 662 in FY2014 to R 2 079 338 389 in FY2015, by 13.7% from FY2015 to FY2016 (R 2 363 501 788) and by 14.1% to R2 696 846 443 in FY2017. The increase in GGR can be attributed to the increase of active LPMs in all provinces.

EXECUTIVE SUMMARY (continued)

- ✓ GGR generated in the bingo sector represents 4.7% of the total amount of GGR generated by all licensed gambling modes during FY2017. GGR increased by 67.7% from R 436 770 125 in FY2013 to R 732 321 861 in FY2014 mainly as a result of the roll-out of bingo in North West and Eastern Cape provinces during FY2014. An increase by 52.5% was recorded in the generation of GGR from FY2014 to FY2015 (R1 116 673 081) mainly as a result of the roll-out of bingo in KwaZulu-Natal. By comparison, a decrease of 16.1% in GGR generated in the bingo industry was recorded from FY2015 to FY2016 (R 936 166 348). This is mainly as a result of less GGR generated in Gauteng during FY2016 compared to FY2015. In contrast, an increase by 36.6% was recorded in the generation of GGR from FY2016 to FY2017 (R 1 278 664 383). The increase in operational bingo positions in North West and Eastern Cape may be linked to the high increase in GGR.
- ✓ Overall, GGR increased by 9.6% from R21,8 billion in FY2014 to R 23,9 billion in FY2015, by 8.8% to R26,0 billion in FY2016, and by 3.8% to R27,0 billion in FY2017. A total amount of R 26 961 888 560 in GGR was generated during FY2017. During FY2017 casinos accounted for the highest GGR generated, being 66.4% as compared to other gambling modes. Compared to all other provinces, Gauteng at a 41.1% share, accounted for the highest amount of GGR generated.
- ✓ In general, the collection of taxes/levies increased by 10.7% from R2,2 billion to R2,5 billion in FY2015, by 11.9% to R2,8 billion in FY2016, however decreased by 1,0% to R2,7 billion in FY2017. A total amount of R 2 743 112 930 in taxes/levies was collected during FY2017. During FY2017, at 66.5%, casinos contributed the highest amount of taxes/levies paid by comparison with other gambling modes. At 36.6 Gauteng accounted for the highest amount of taxes/levies paid compared to all other provinces.

Turnover per gambling mode – FY2017

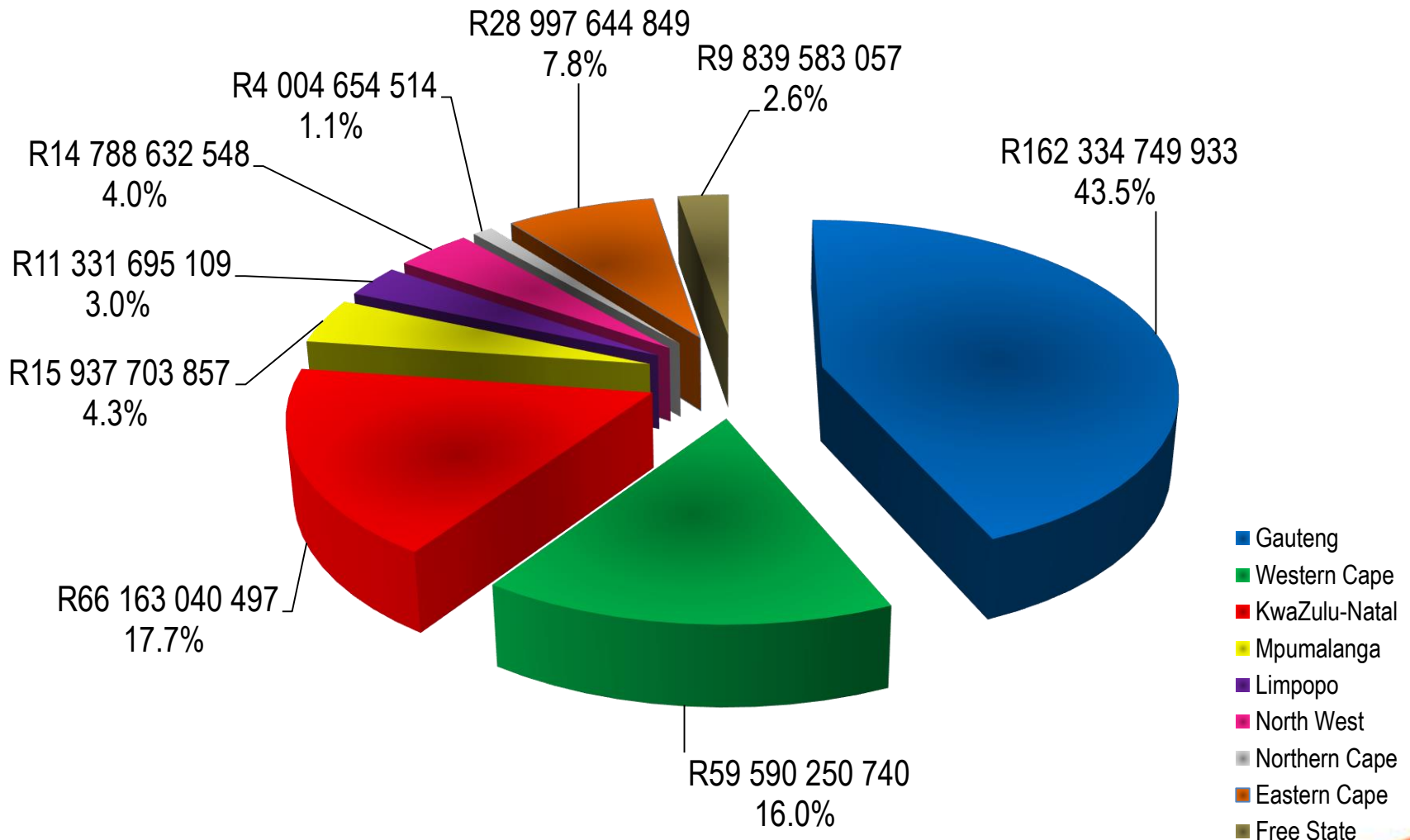
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion.



Total turnover: R 372 987 955 104

Turnover per province – FY2017

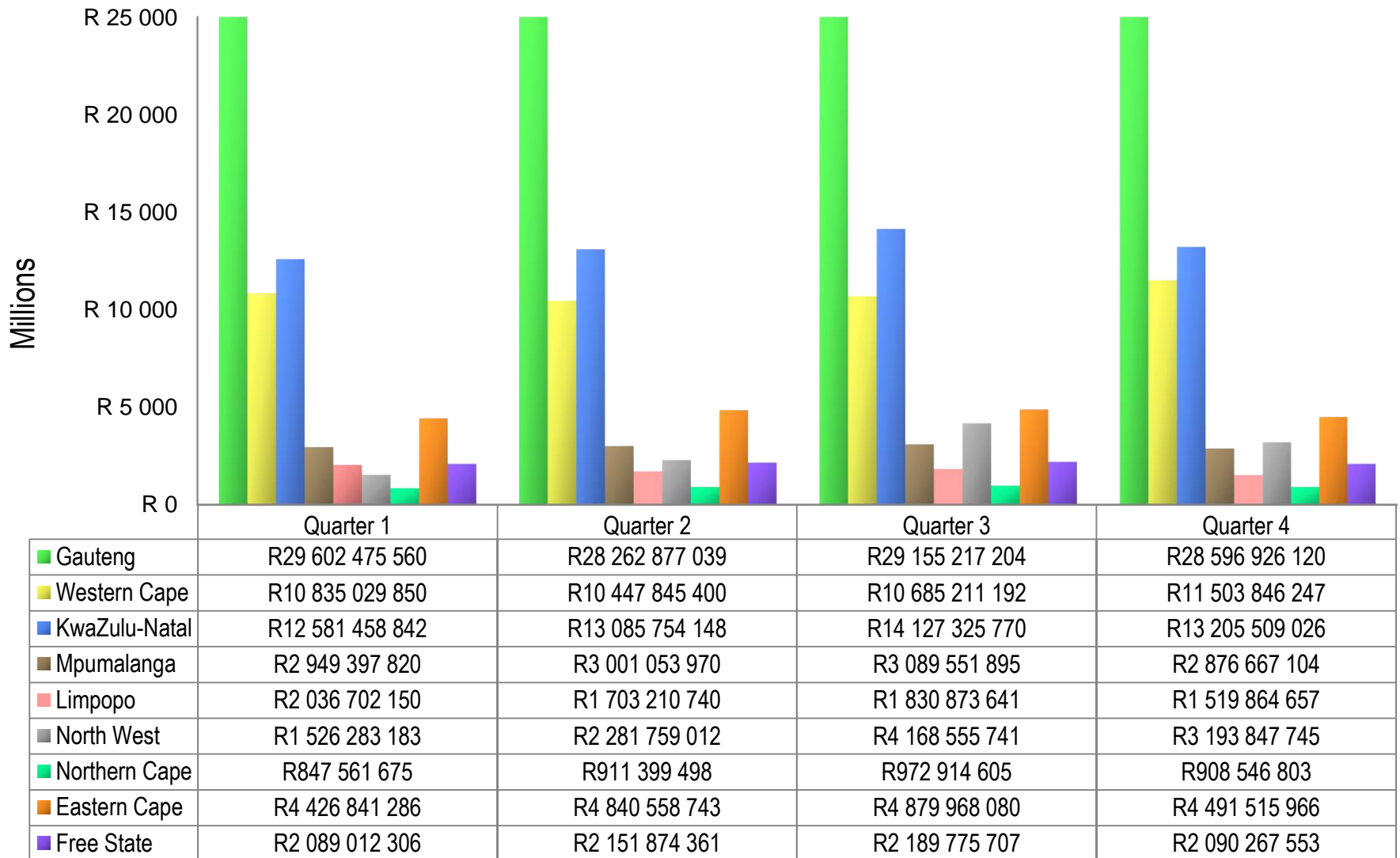
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion.



Total turnover: R 372 987 955 104

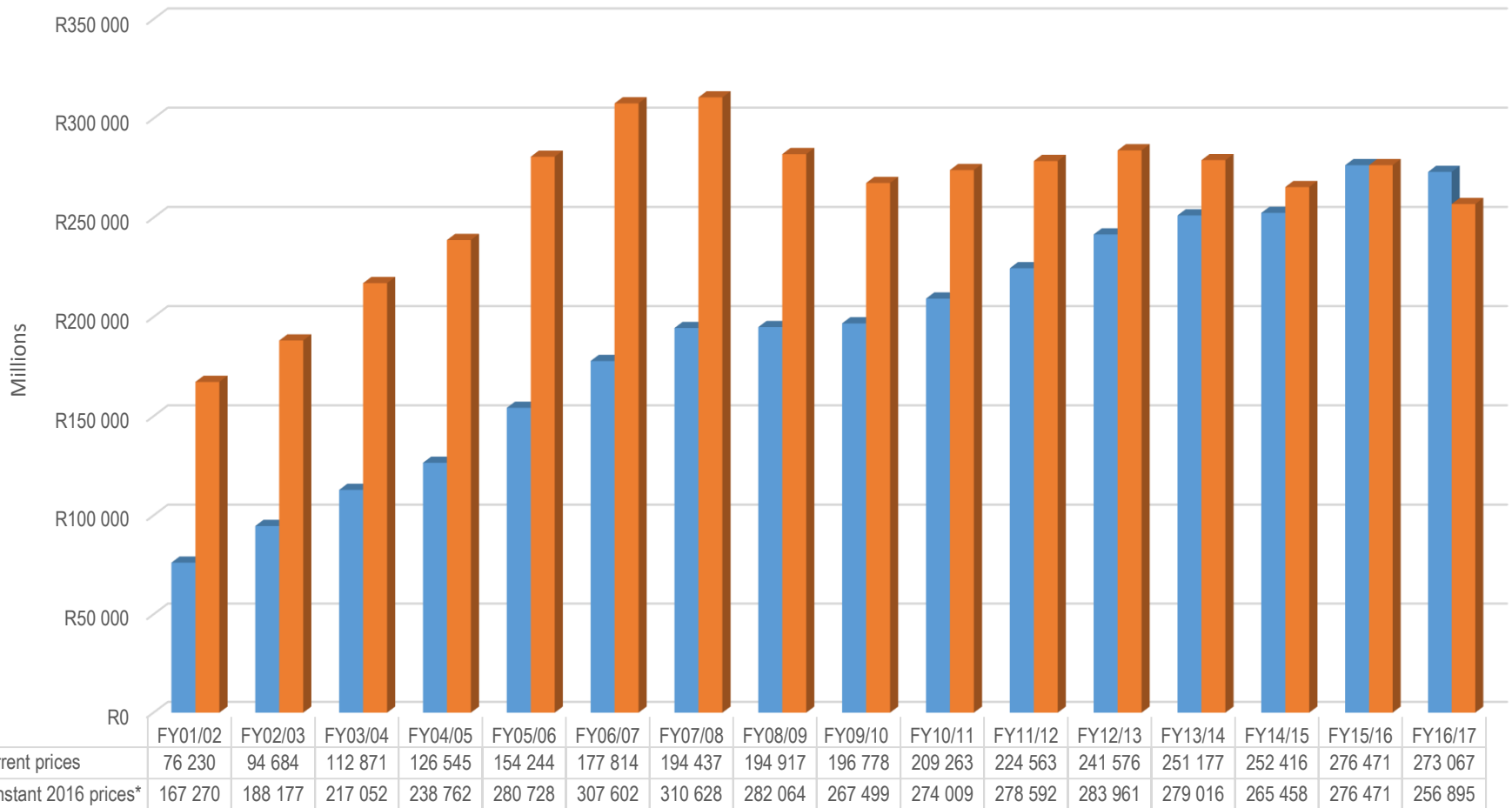
Quarterly casino turnover - FY2017

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



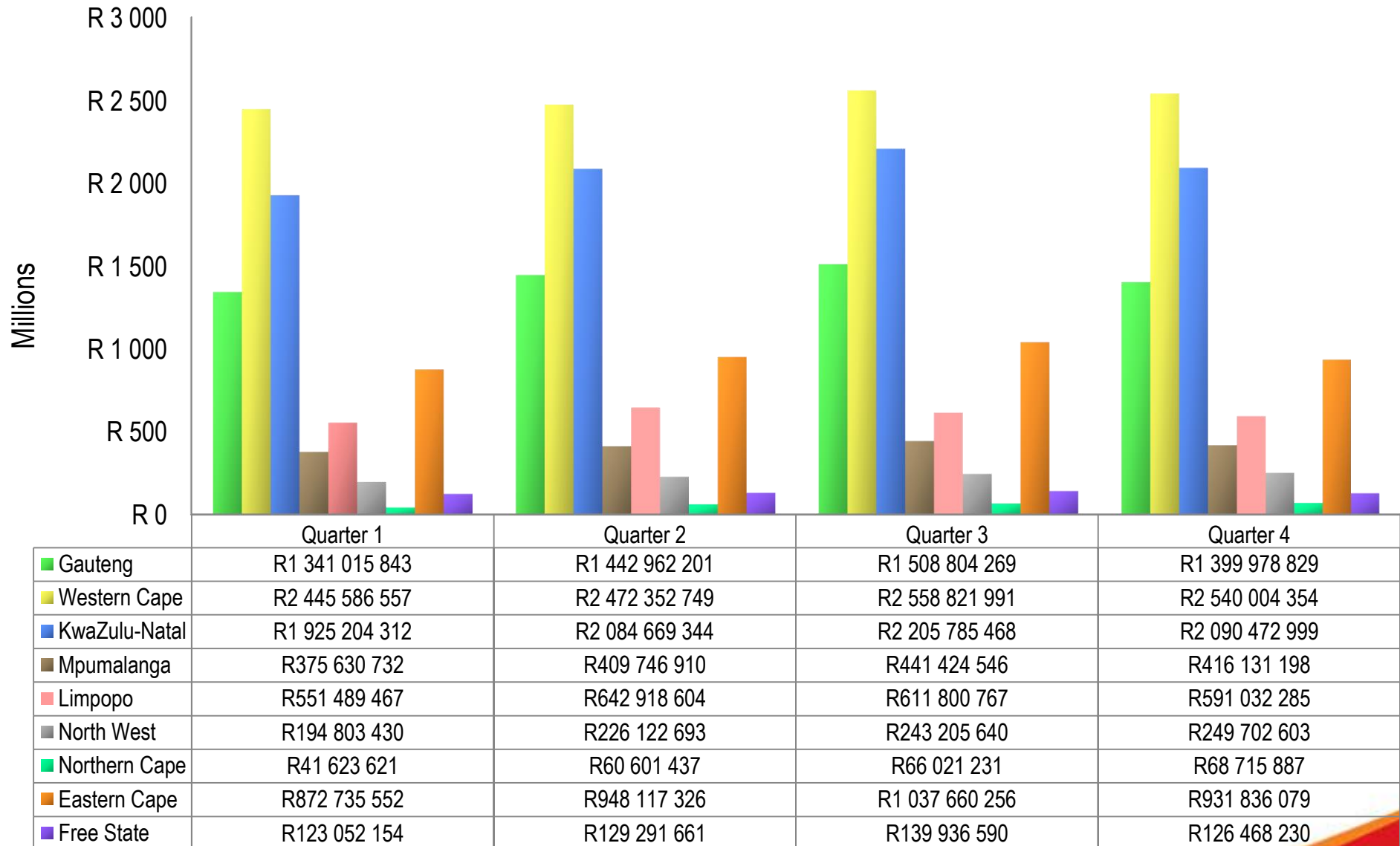
Trend in turnover casinos – FY2001/02 to FY2016/17

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



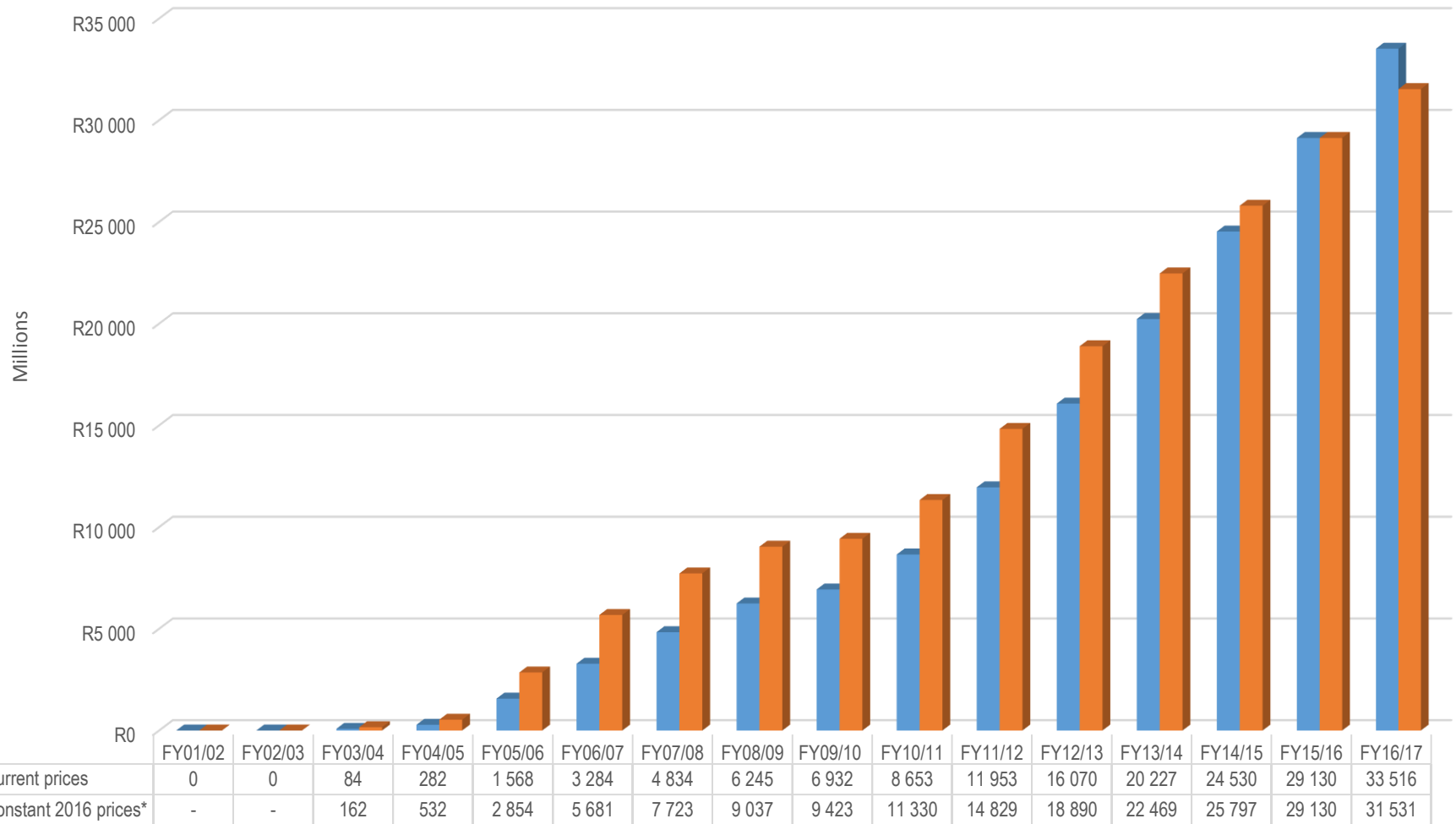
Quarterly LPM turnover - FY2017

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



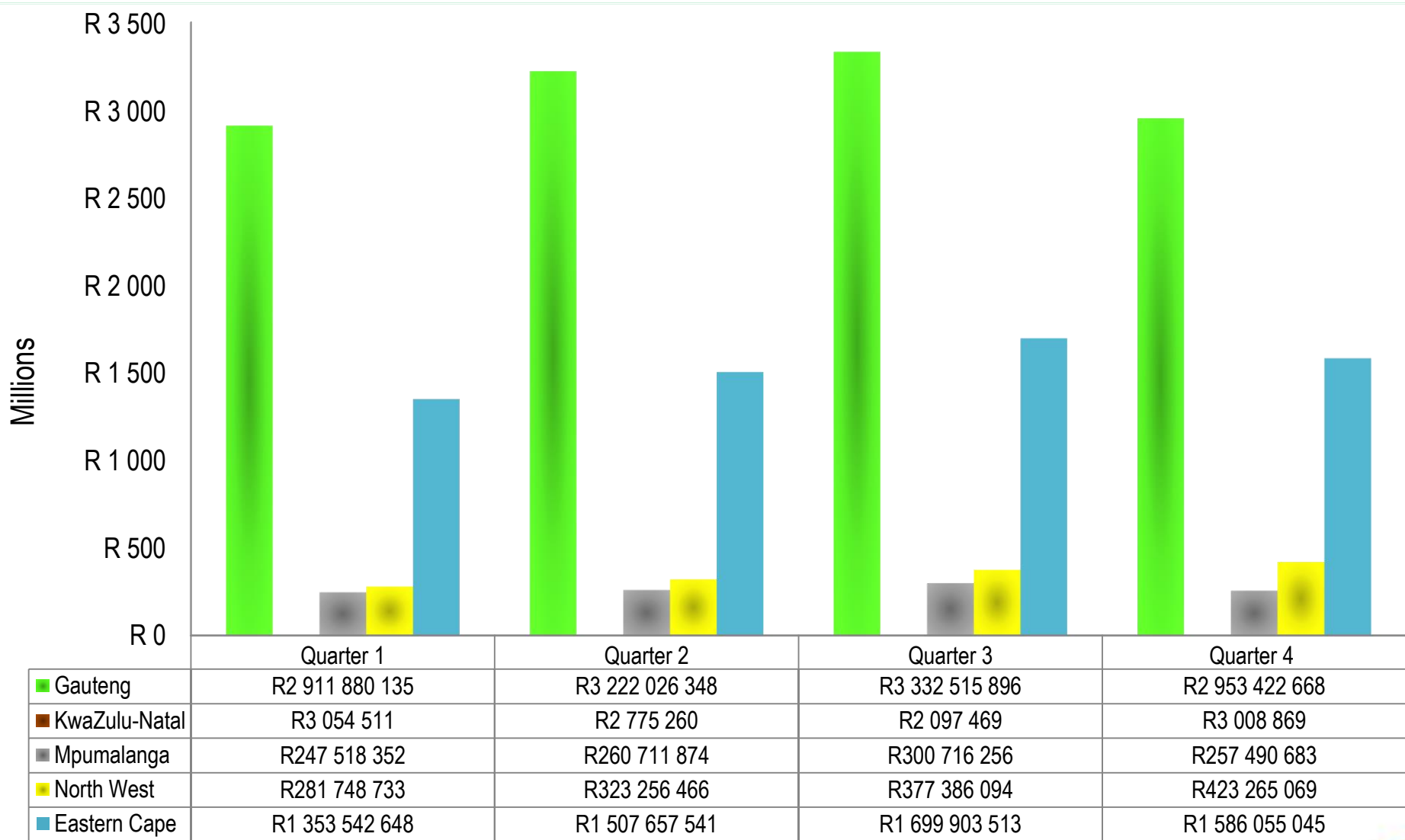
Trend in turnover LPMs – FY2001/02 to FY2016/17

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



Quarterly bingo turnover - FY2017*

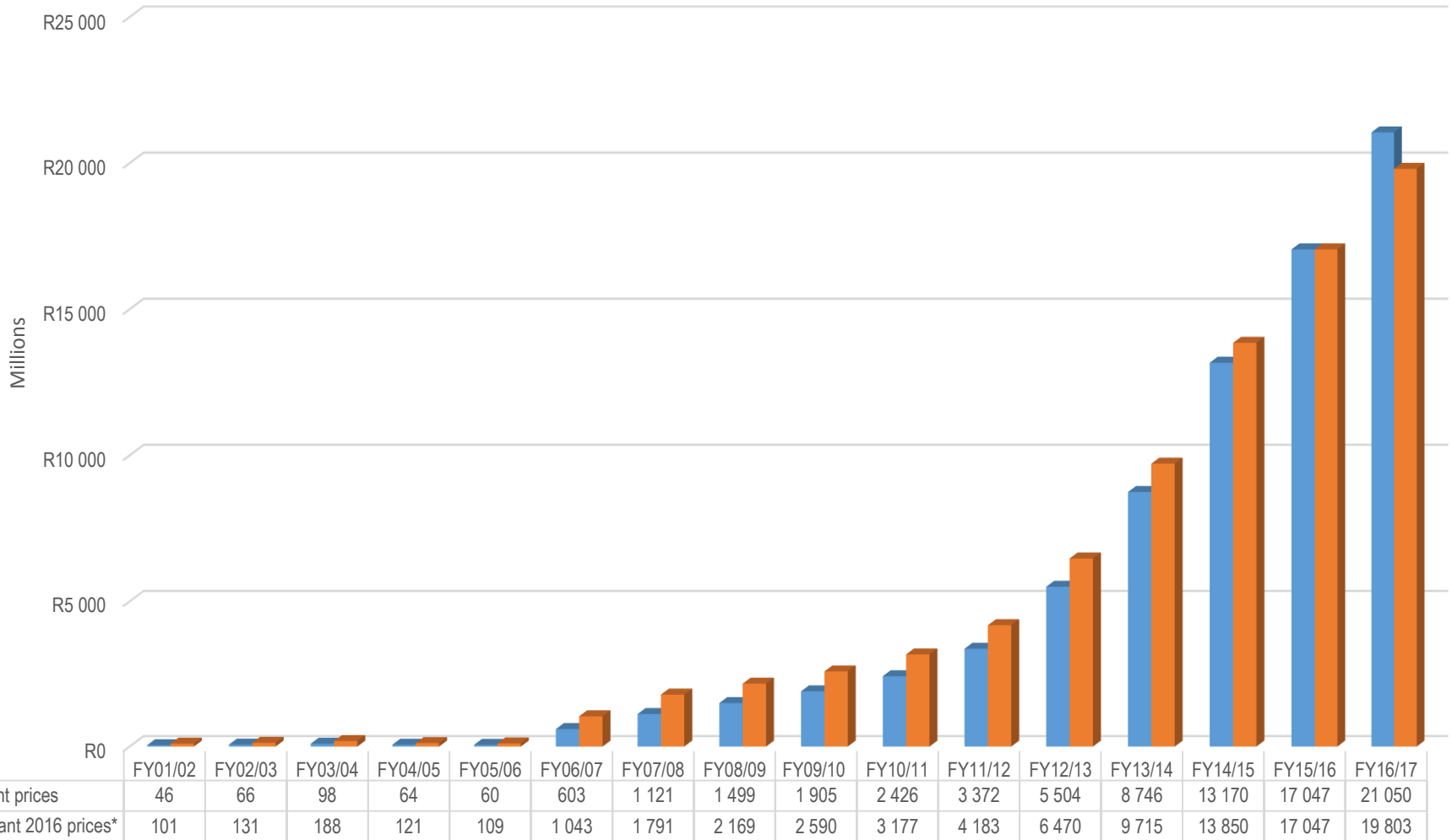
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



- 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 FY2016/17

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



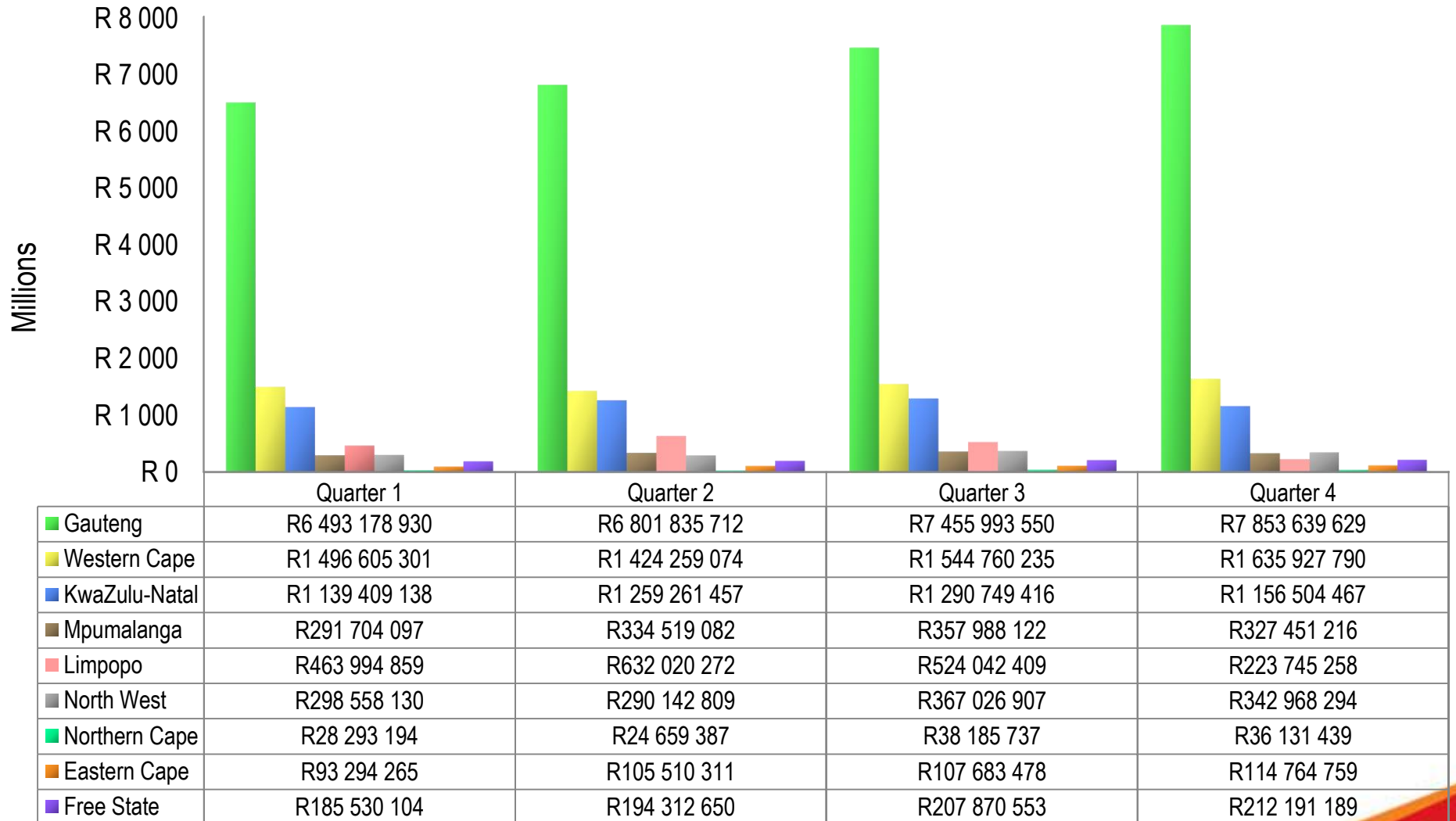
2016 constant prices, Reserve Bank

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

Quarterly betting turnover – FY2017

Bookmakers & Totalisators

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

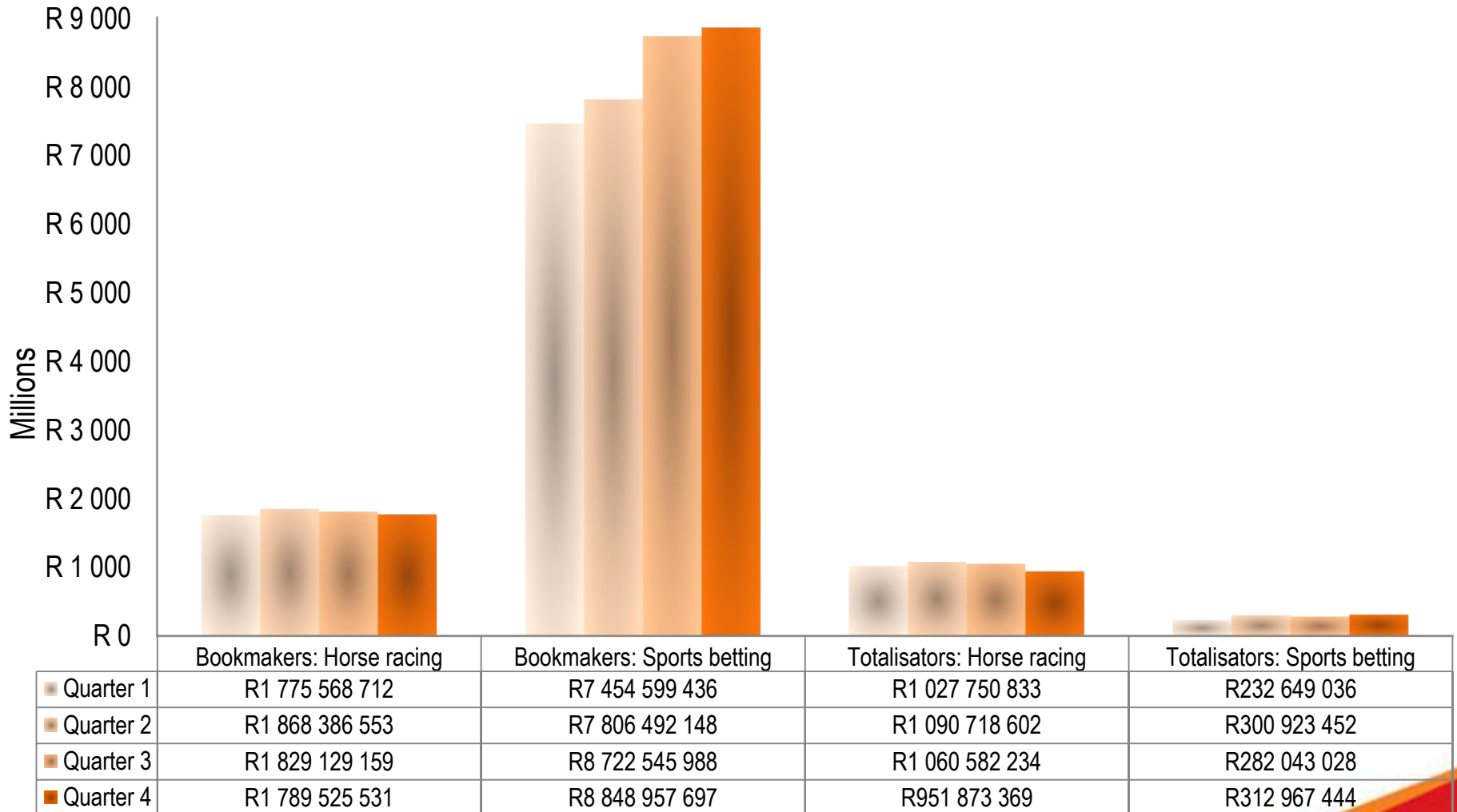


Quarterly betting turnover – FY2017

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

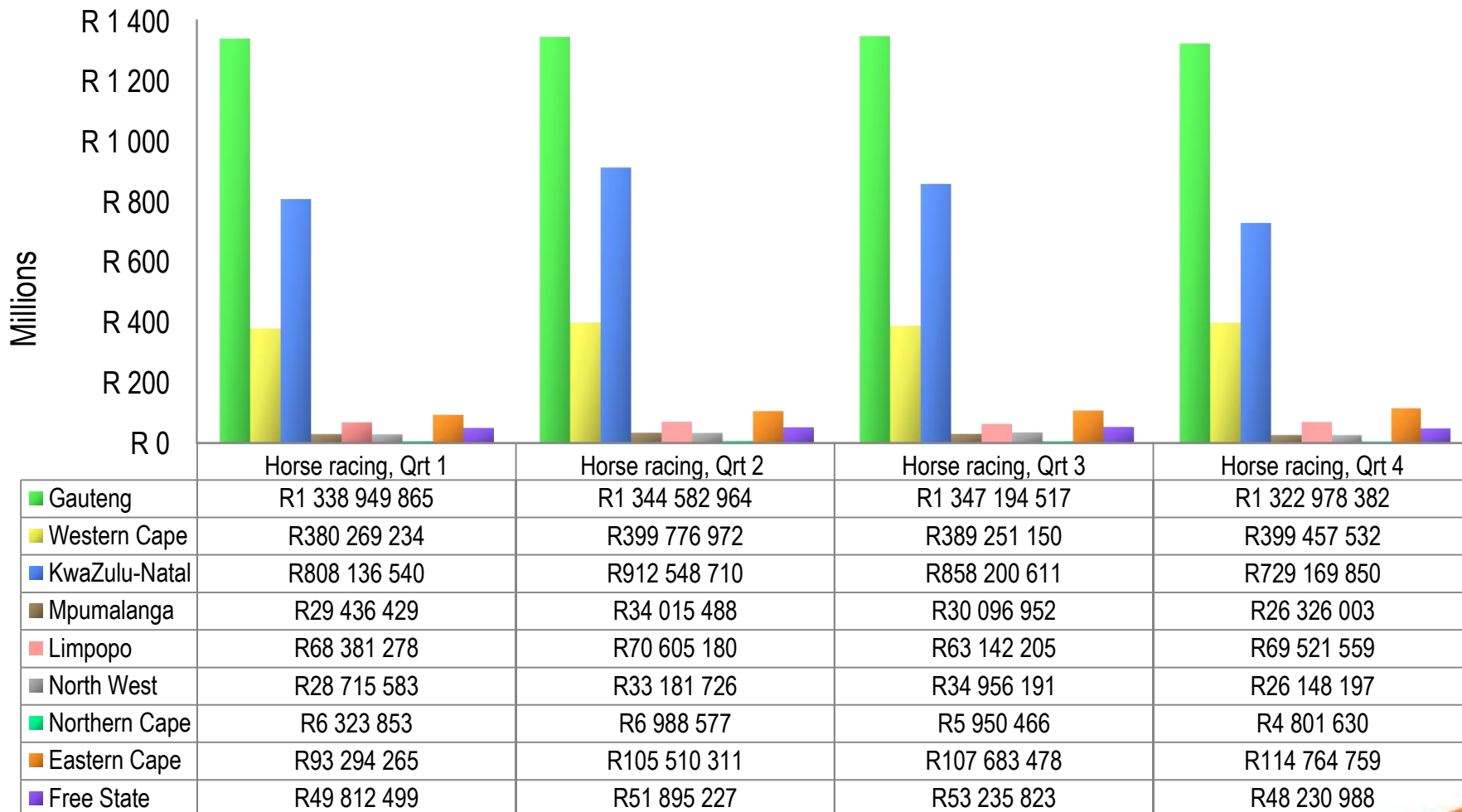


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting turnover – FY2017

Betting on horse racing*

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

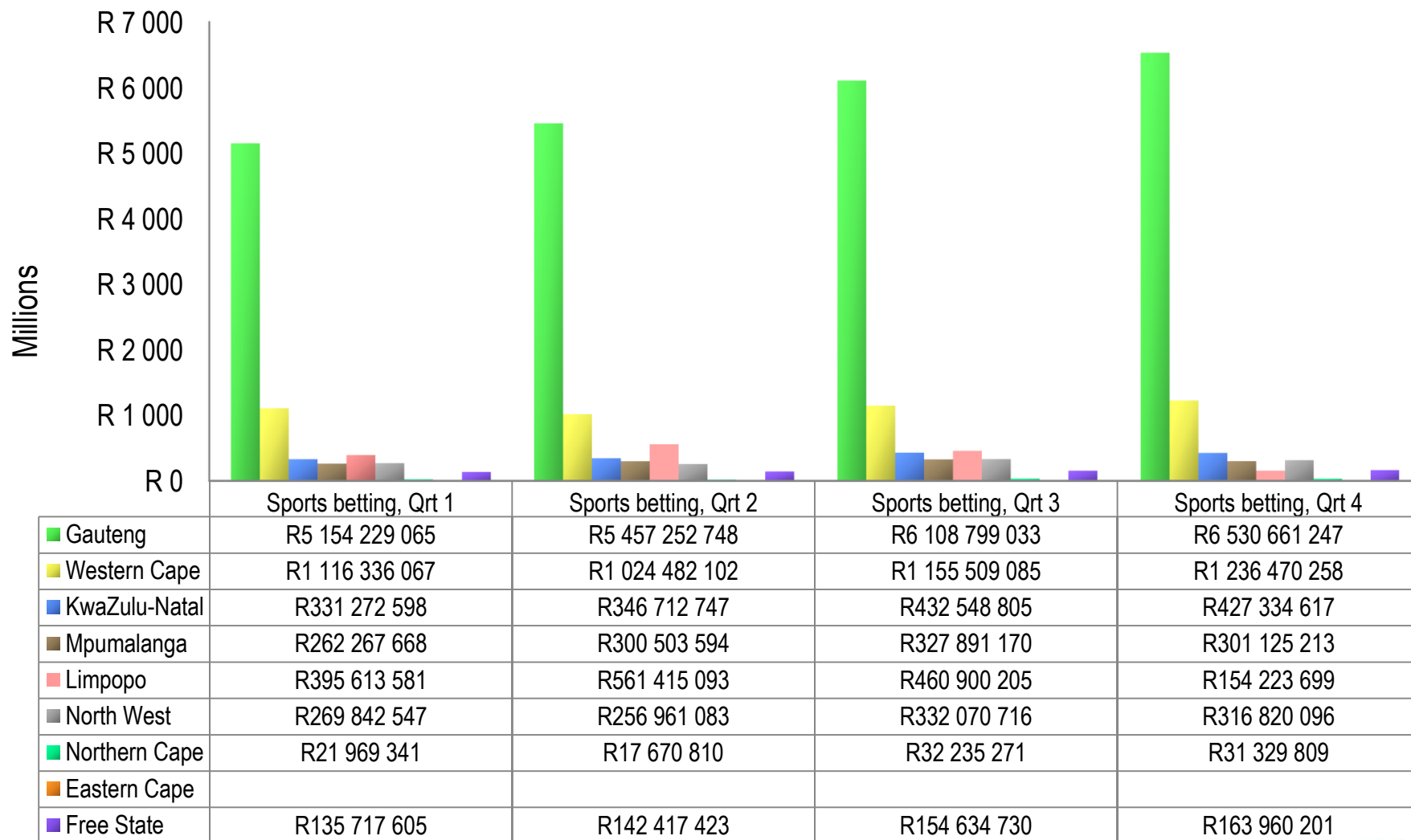


* Eastern Cape: Statistics includes sports betting

Quarterly betting turnover – FY2017

Betting on sport*

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

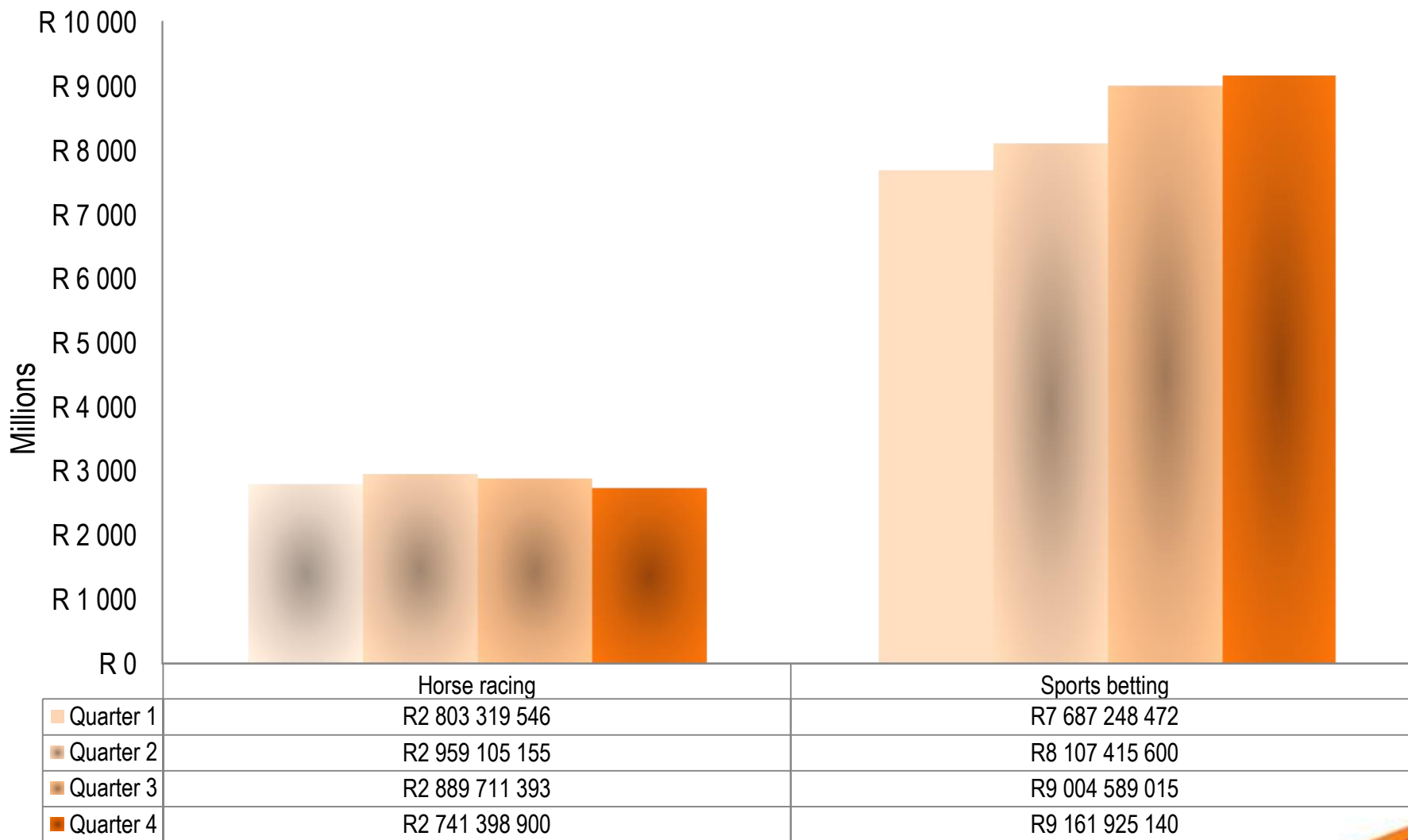


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting turnover – FY2017

Split between betting on horse racing & sport

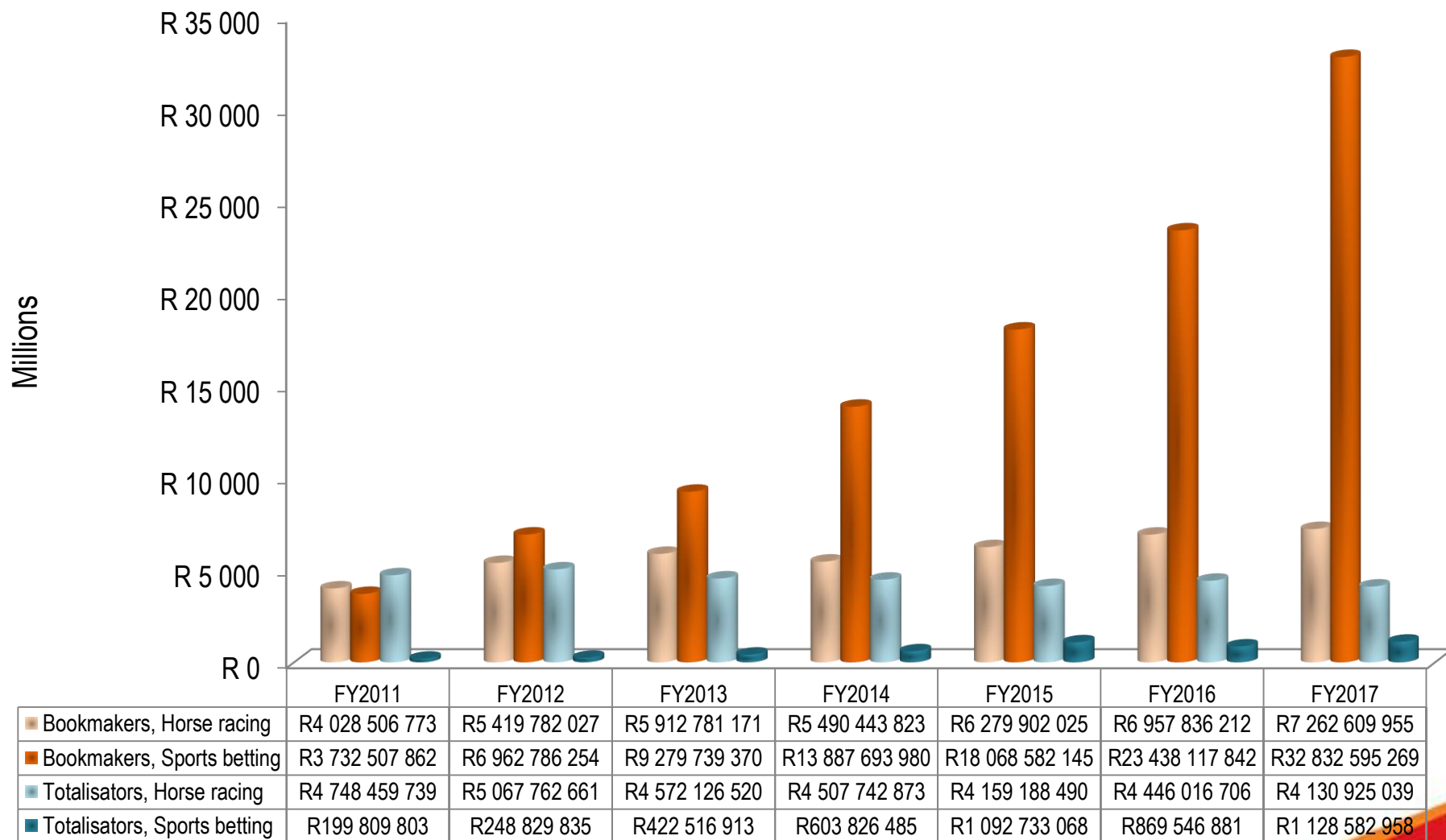
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



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

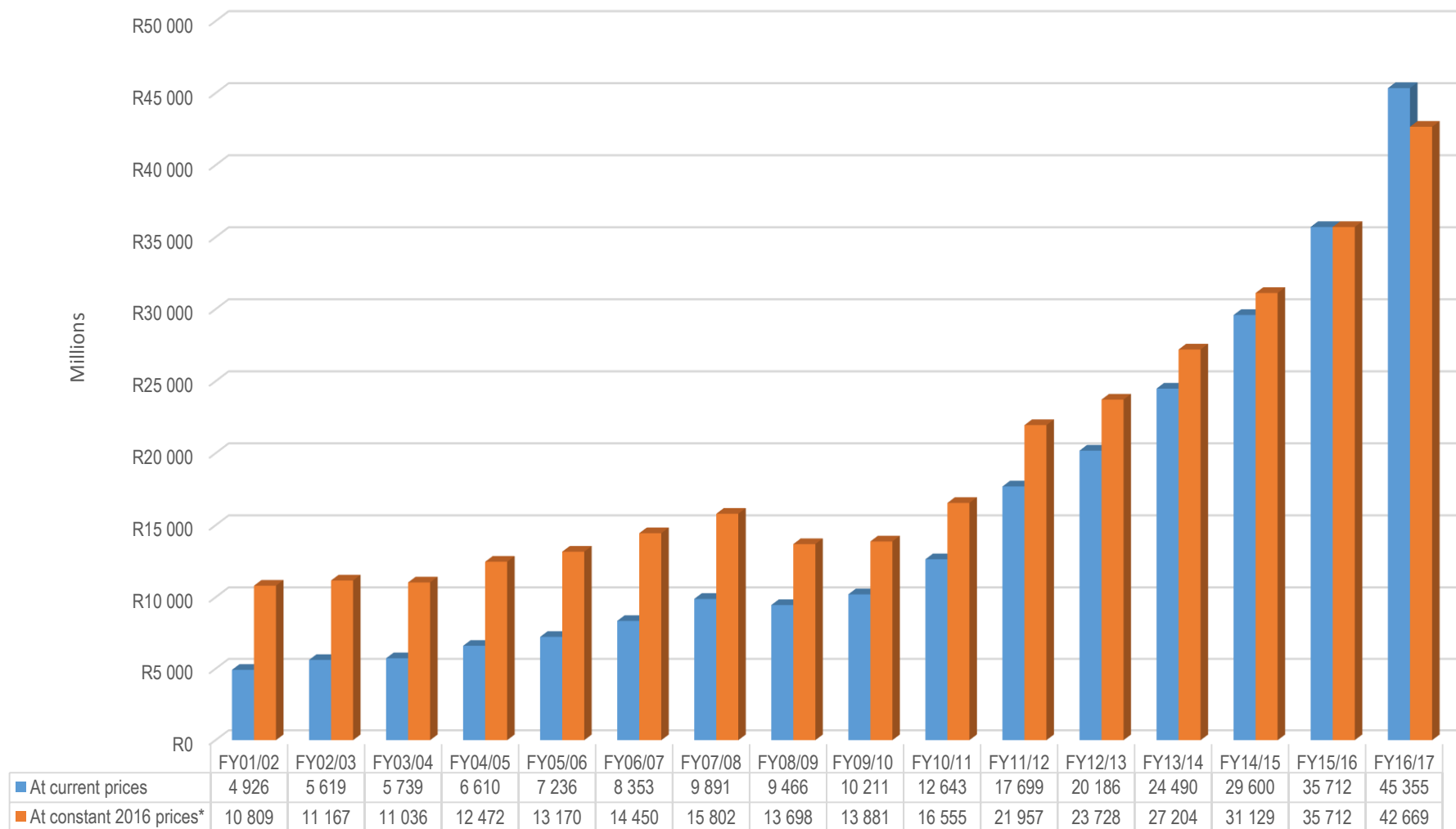
Trend in turnover, bookmakers & totalisators, FY2011 to FY2017

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 FY2016/17

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

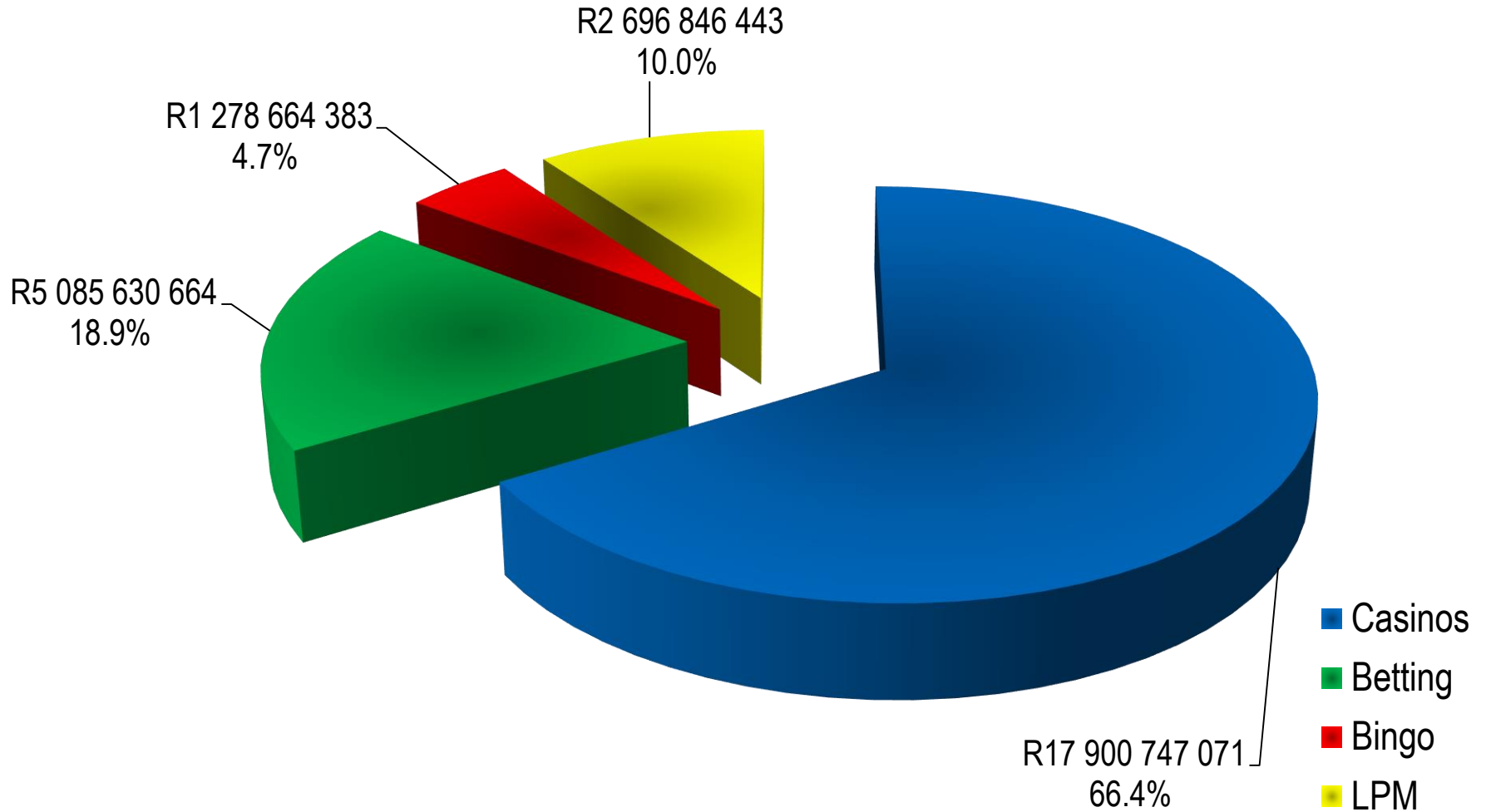


Summary : Turnover

- ❑ A total amount of R 372 987 955 104 was wagered in FY2017.
- ❑ Casinos accounted for the highest TO at 73.2% by comparison with all other gambling modes in FY2017.
- ❑ Gauteng accounted for the highest amount of TO in respect of all gambling modes, the total percentage being 43.5% as compared to other provinces in FY2017.
- ❑ Although Gauteng represented the highest amount of turnover relative to casinos (42.3%), betting on horse racing and sport (63.1%), and bingo (59.0%), the highest amount of money in the LPM sector was wagered in Western Cape (29.9%) in FY2017.

GGR per gambling mode – FY2017

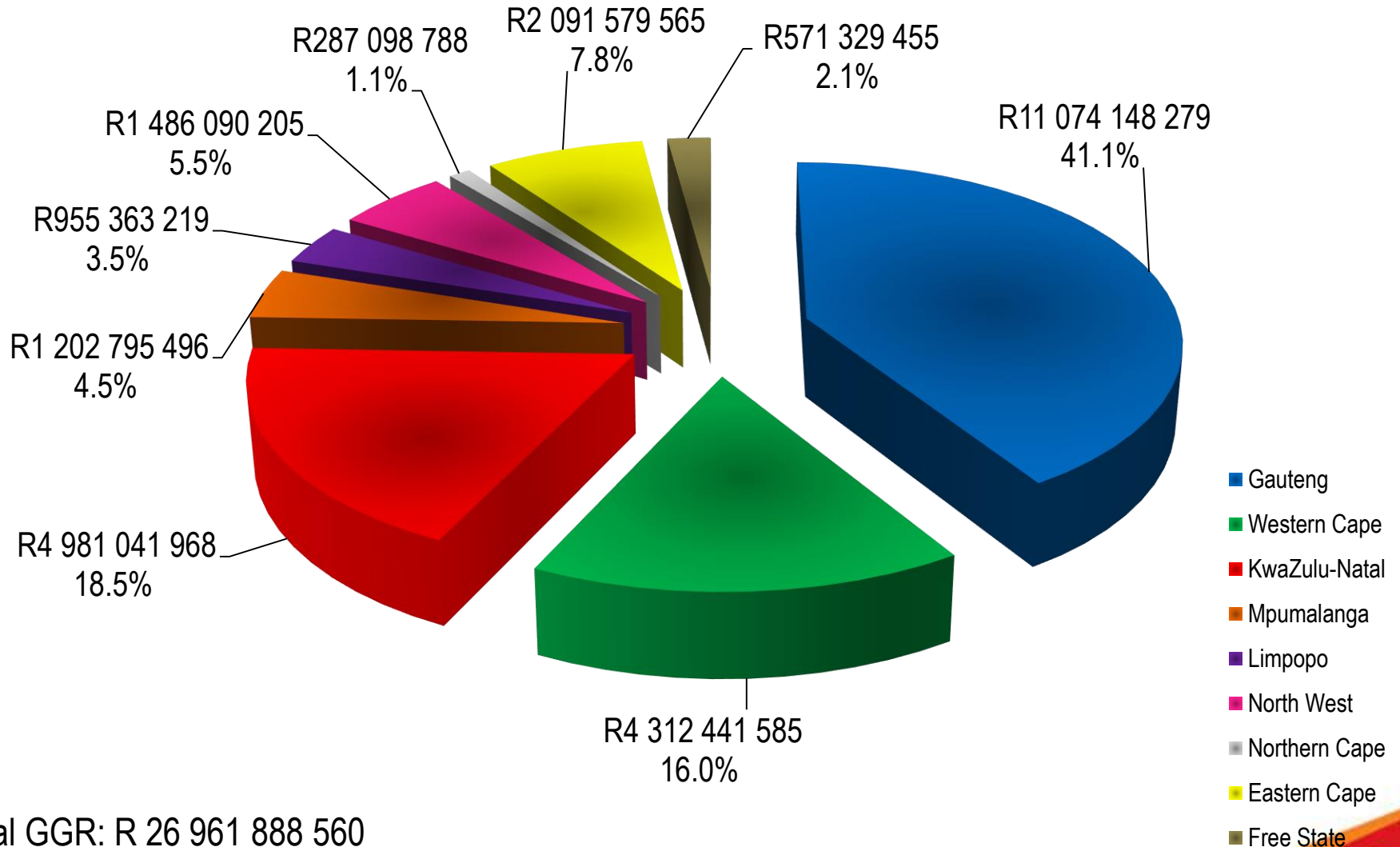
Rand value of the gross revenue of an operator



Total GGR: R 26 961 888 560

GGR per province - FY2017

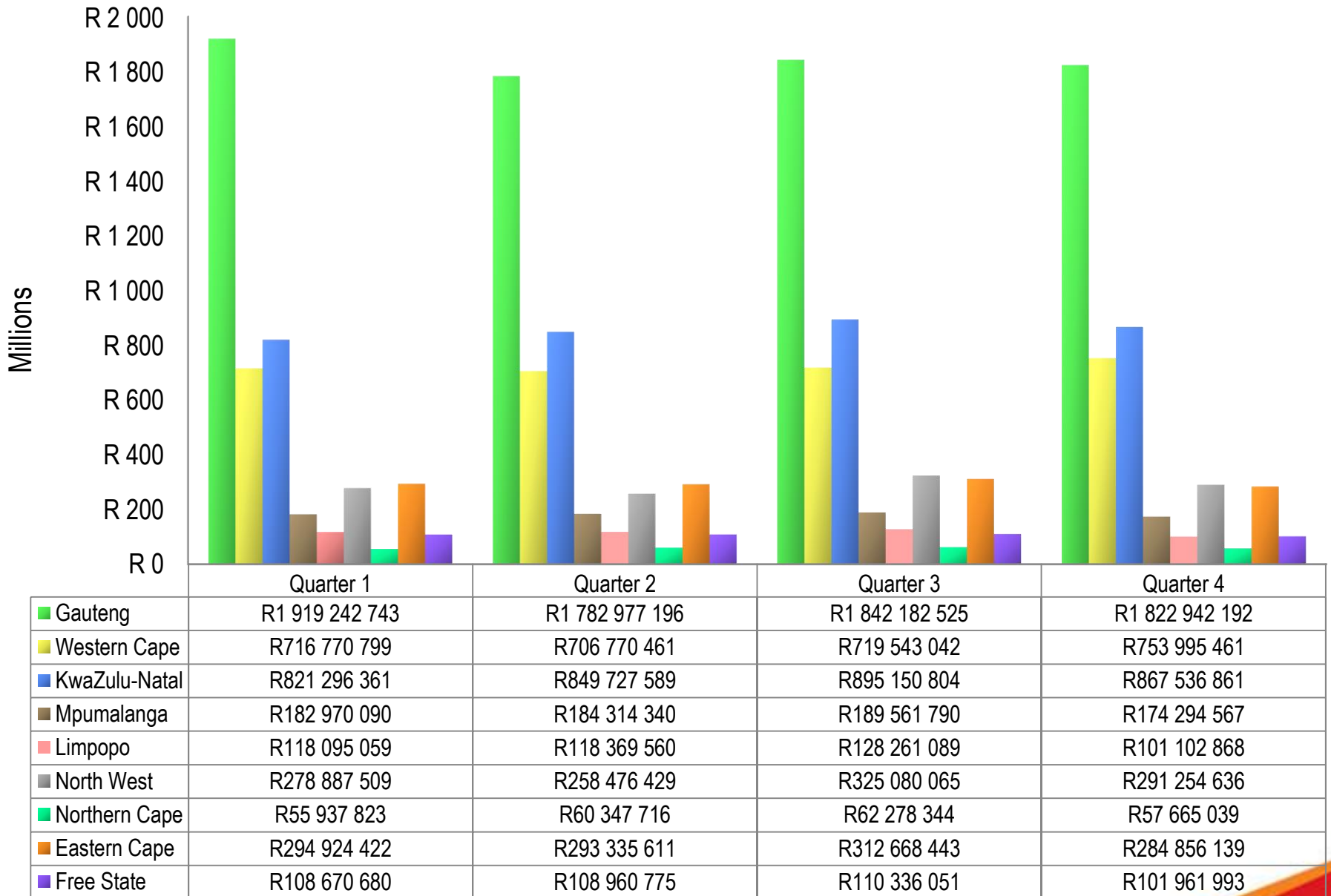
Rand value of the gross revenue of an operator



Total GGR: R 26 961 888 560

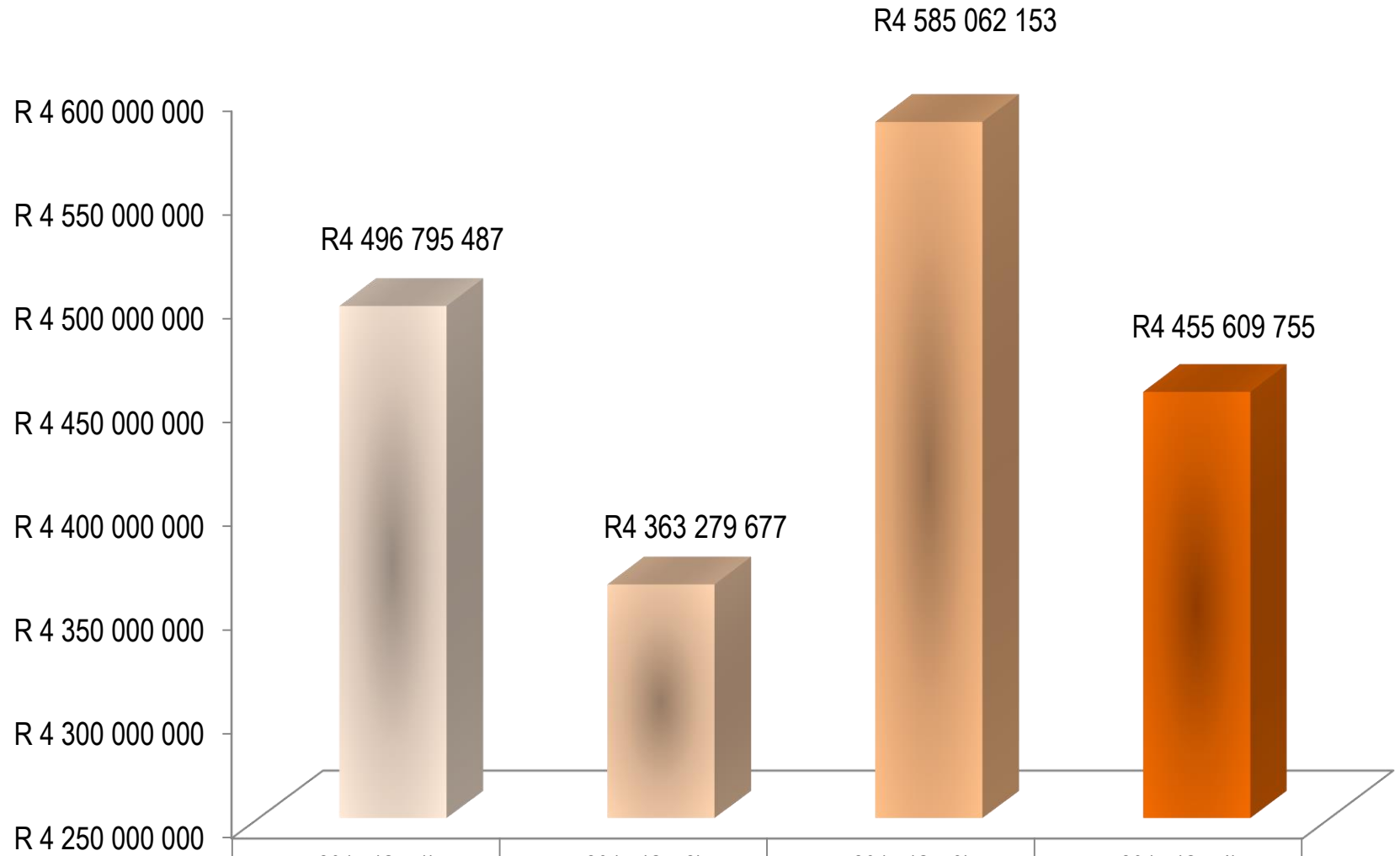
Quarterly casino GGR - FY2017

Rand value of the gross revenue of an operator



Trend in GGR casinos – FY2017

Rand value of the gross revenue of an operator



■ Total GGR, casinos, all provinces

FY2017 (Qrt 1)

R4 496 795 487

FY2017 (Qrt 2)

R4 363 279 677

FY2017 (Qrt 3)

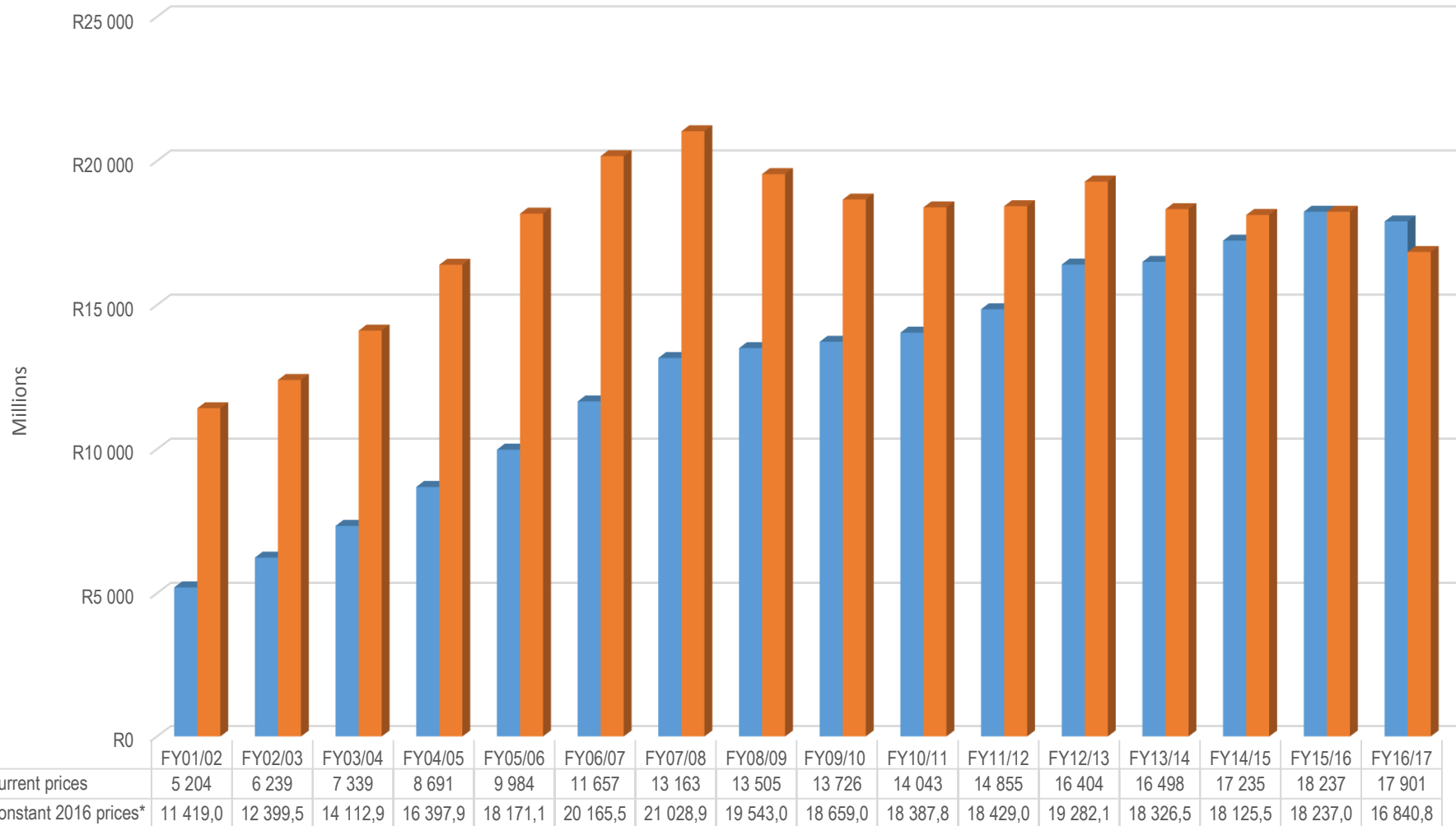
R4 585 062 153

FY2017 (Qrt 4)

R4 455 609 755

Trend in GGR casinos – FY2001/02 to FY2016/17

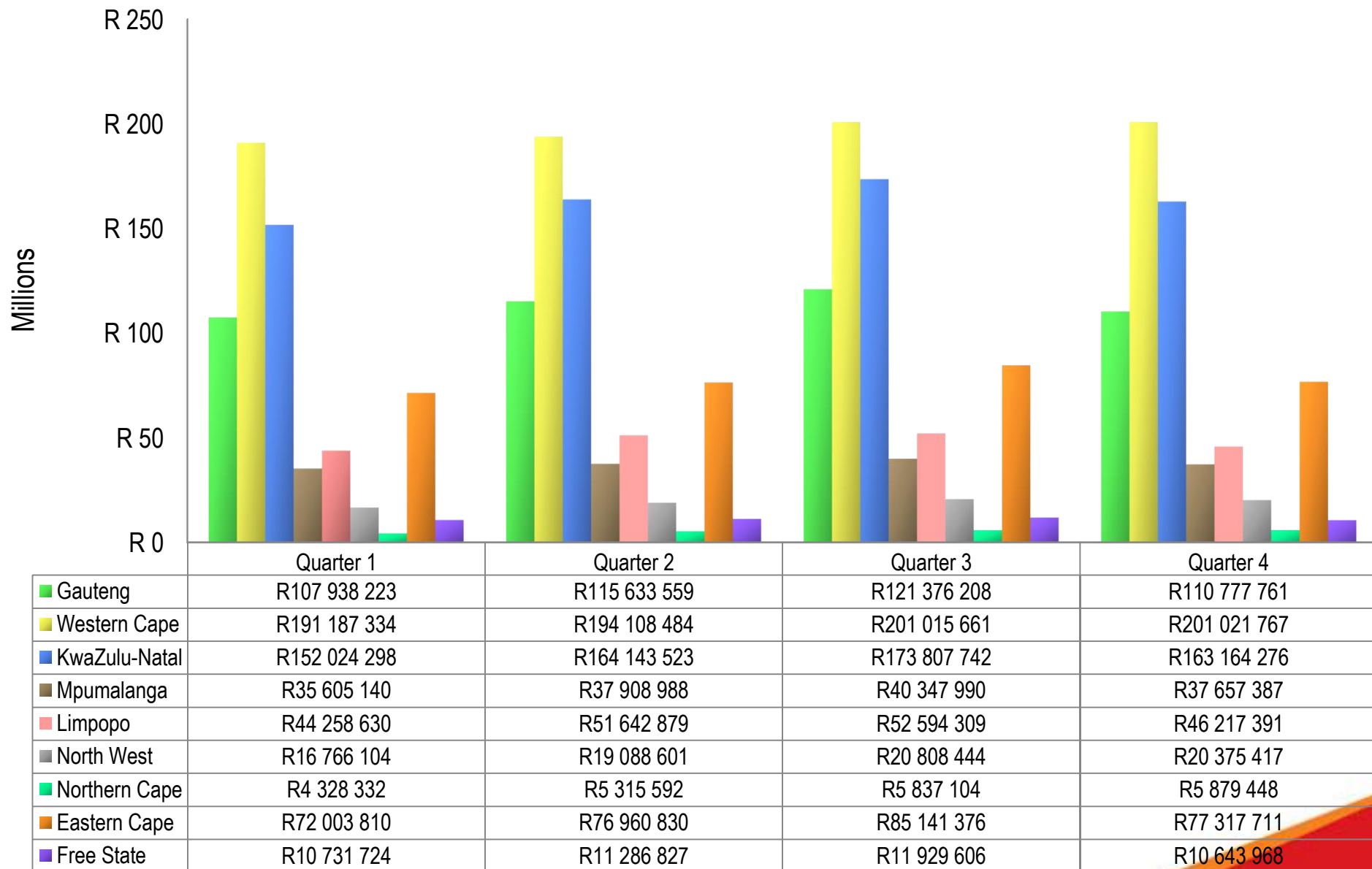
Rand value of the gross revenue of an operator



2016 constant prices, Reserve Bank

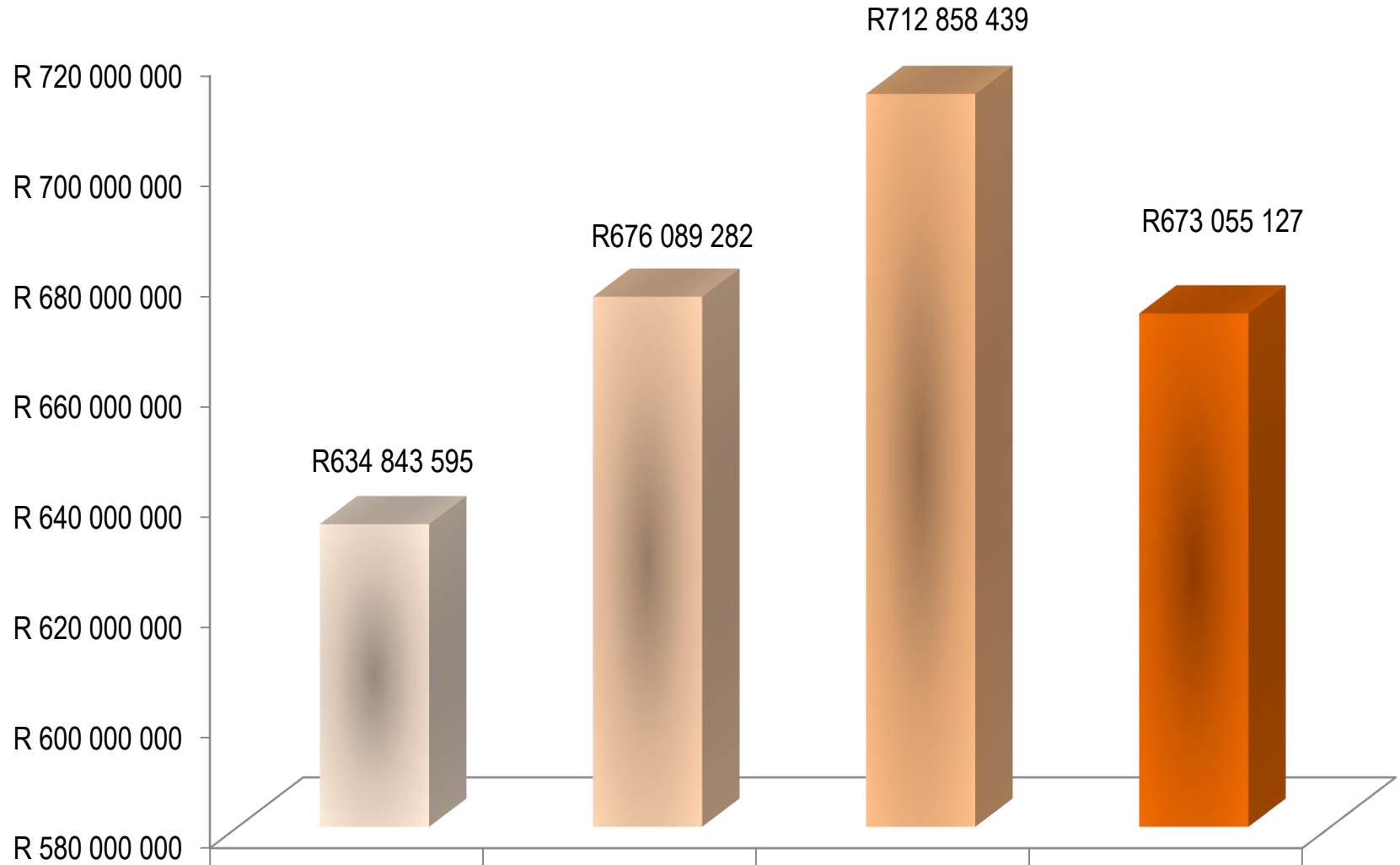
Quarterly LPM GGR - FY2017

Rand value of the gross revenue of an operator



Trend in GGR LPMs – FY2017

Rand value of the gross revenue of an operator



■ Total GGR, LPMs, all provinces

FY2017 (Qrt 1)

R634 843 595

FY2017 (Qrt 2)

R676 089 282

FY2017 (Qrt 3)

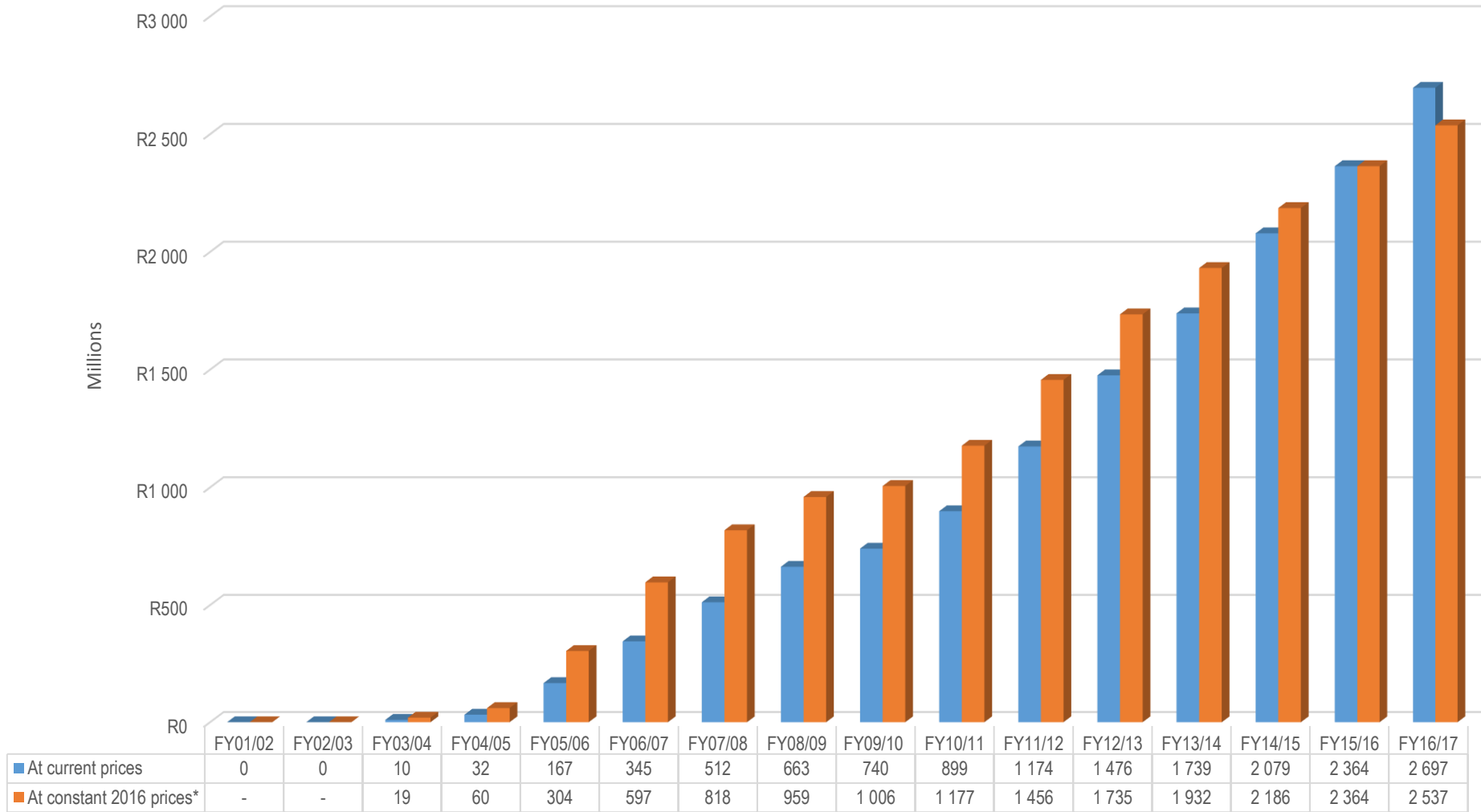
R712 858 439

FY2017 (Qrt 4)

R673 055 127

Trend in GGR LPMs – FY2001/02 to FY2016/17

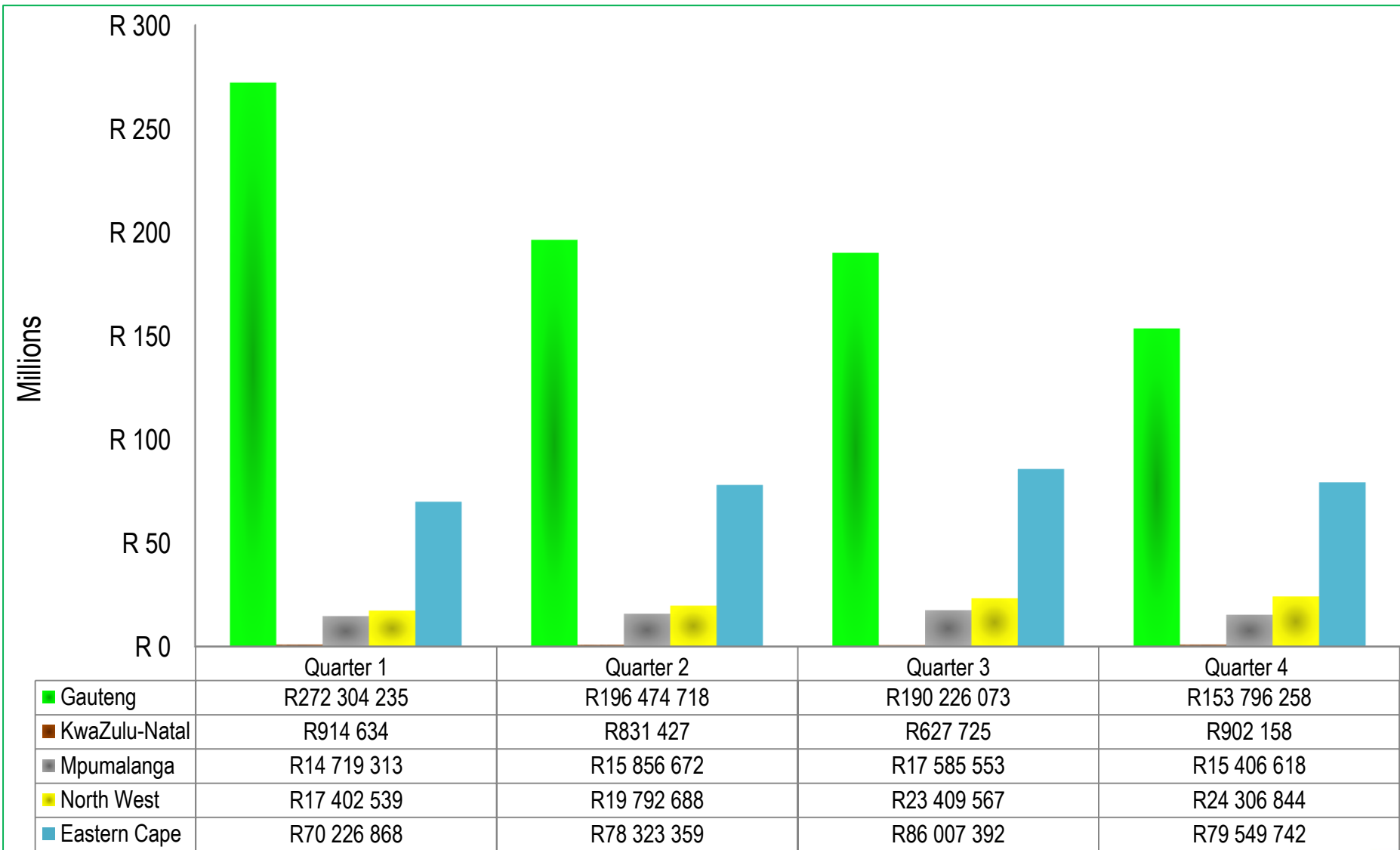
Rand value of the gross revenue of an operator



2016 constant prices, Reserve Bank

Quarterly bingo GGR - FY2017*

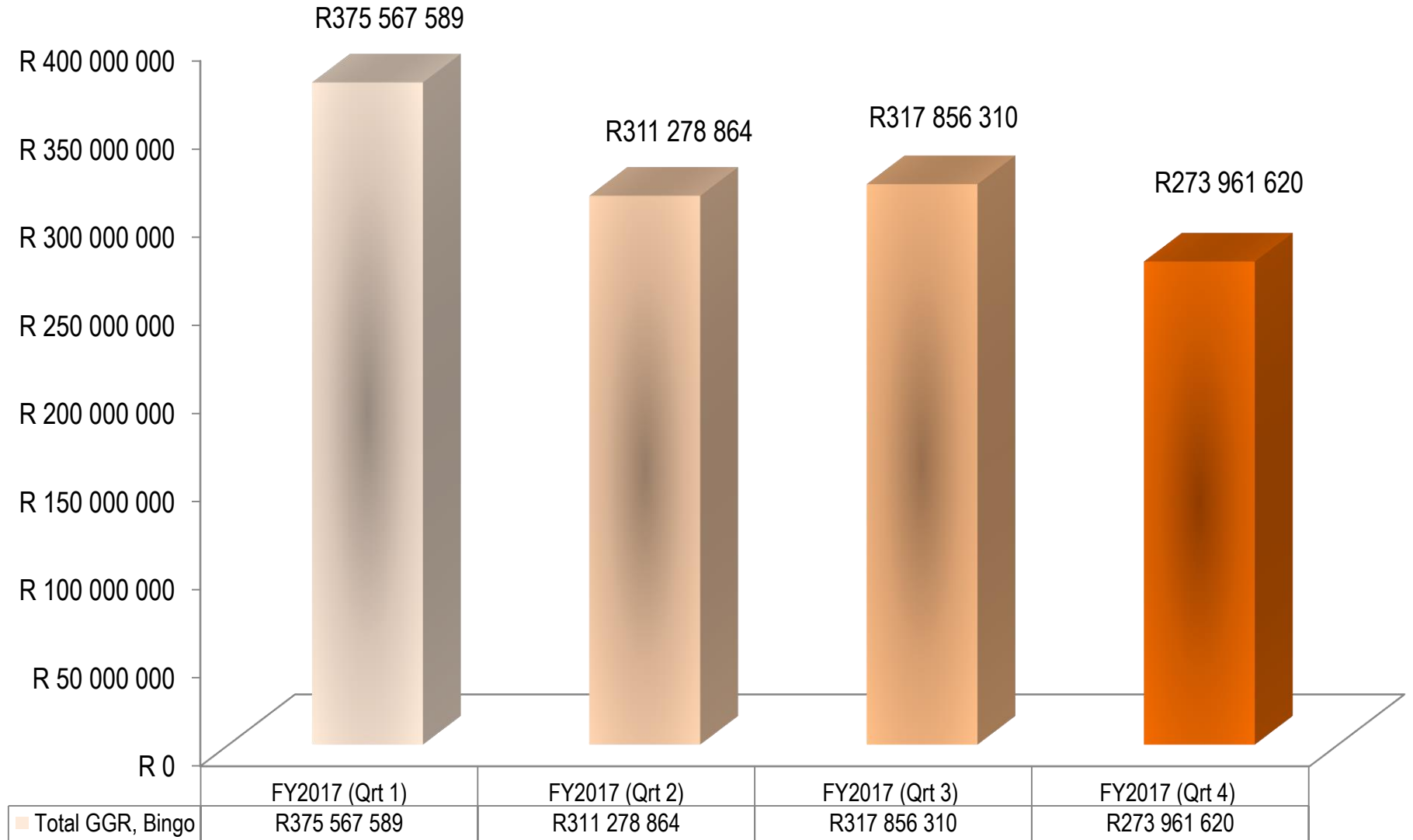
Rand value of the gross revenue of an operator



- 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 – FY2017*

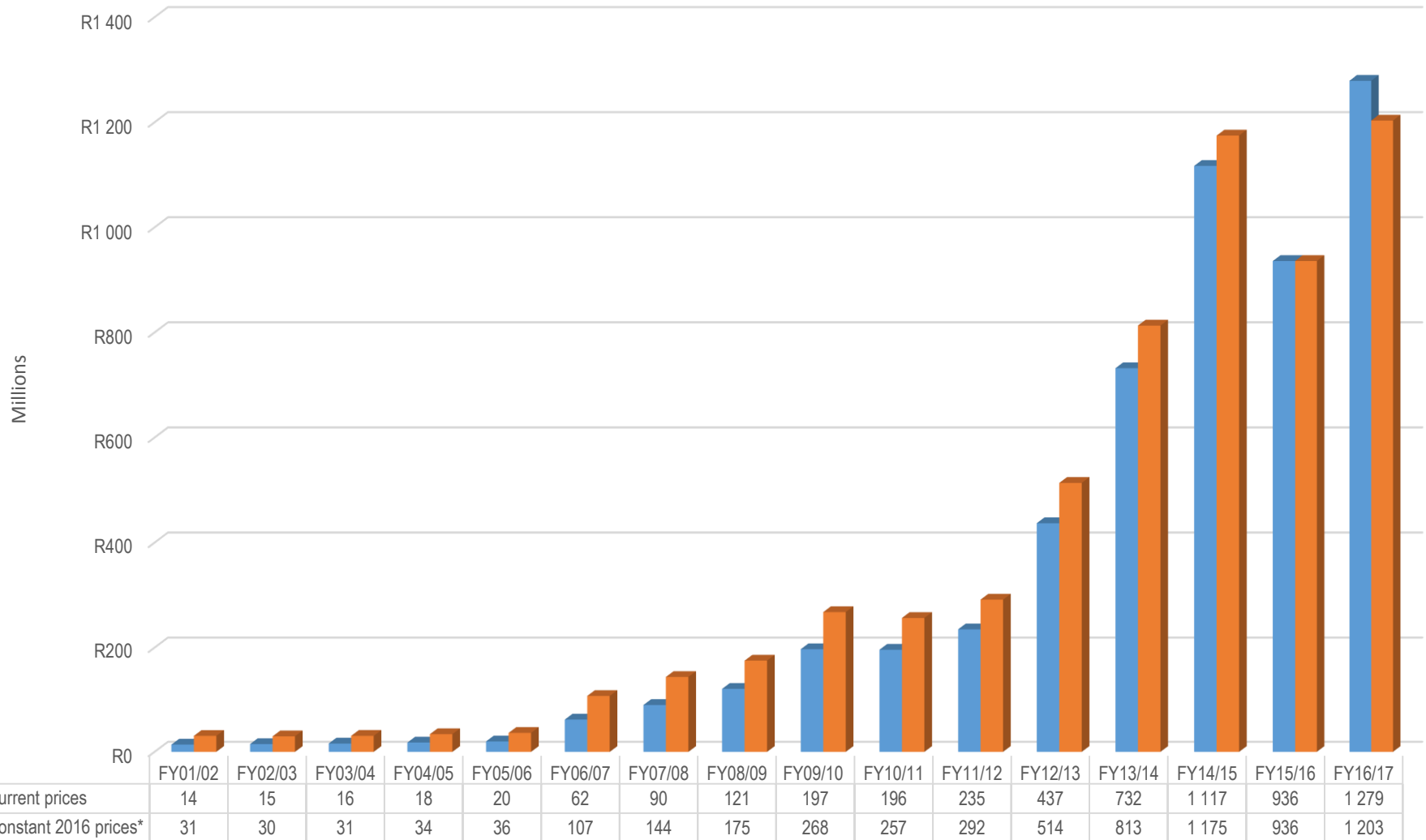
Rand value of the gross revenue of an operator



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

Trend in GGR bingo – FY2001/02 to FY2016/17

Rand value of the gross revenue of an operator



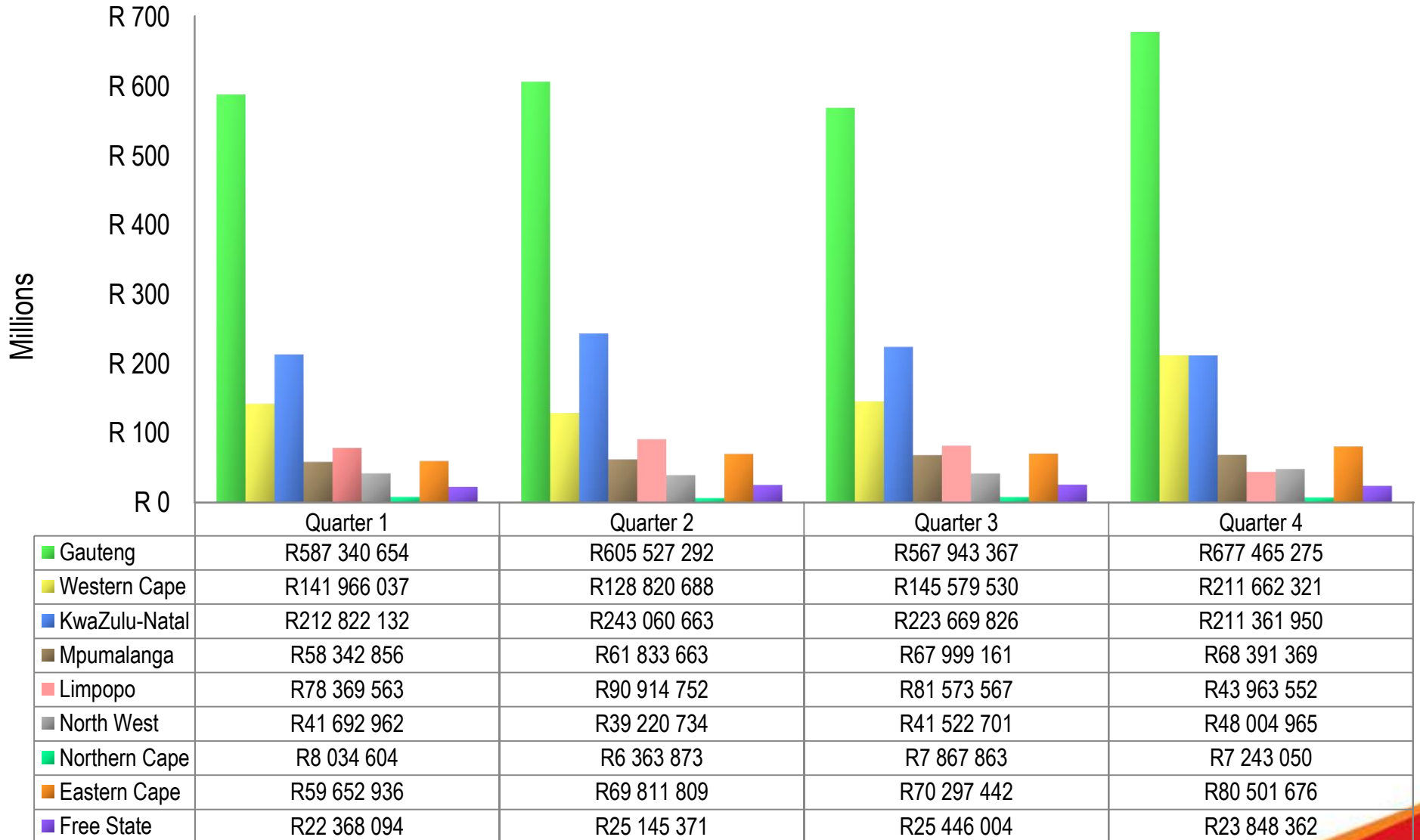
2016 constant prices, Reserve Bank

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

Quarterly betting GGR – FY2017

Bookmakers & Totalisators

Rand value of the gross revenue of an operator

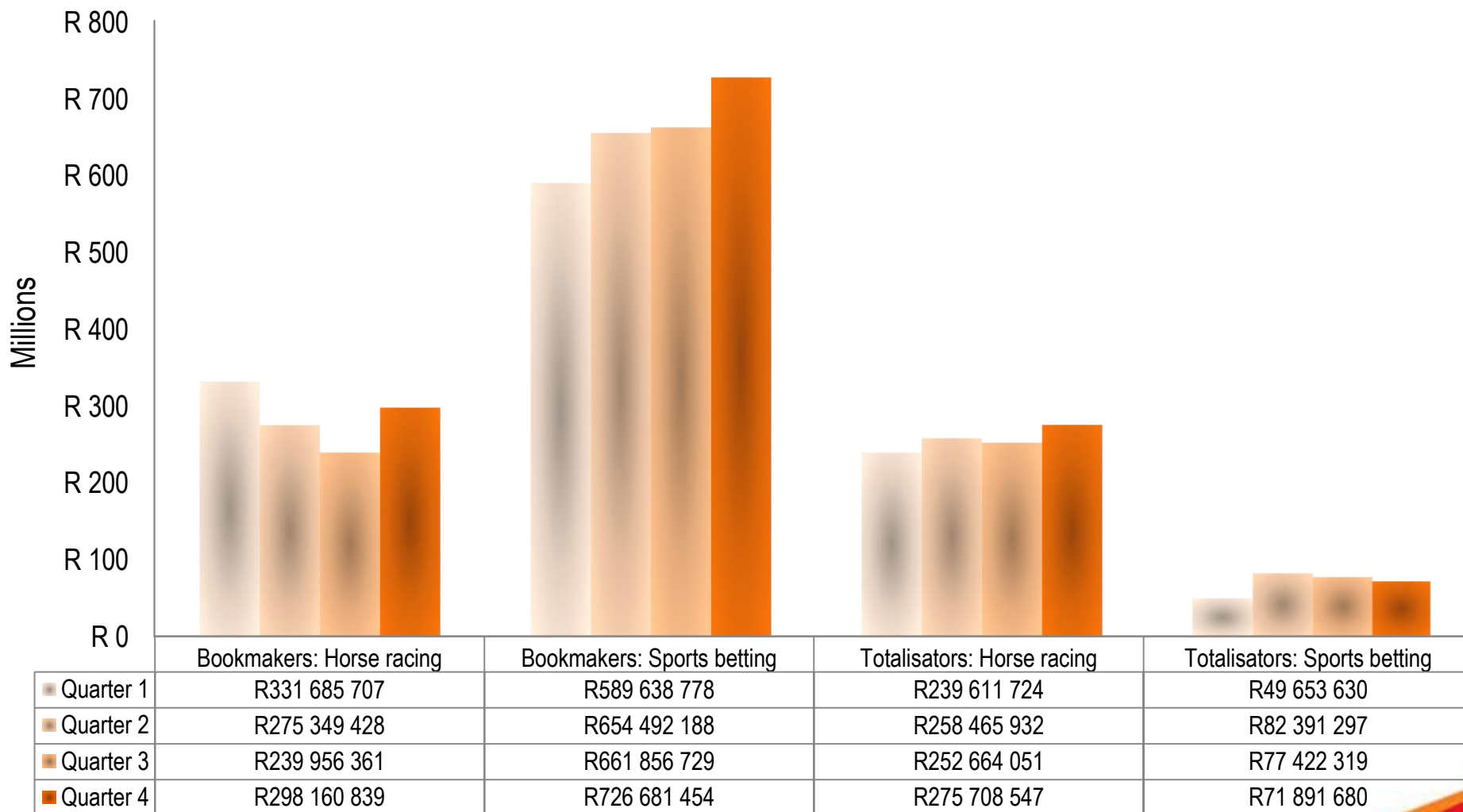


Quarterly betting GGR – FY2017

Split between Bookmakers & Totalisators

Betting on horse racing & sport

Rand value of the gross revenue of an operator

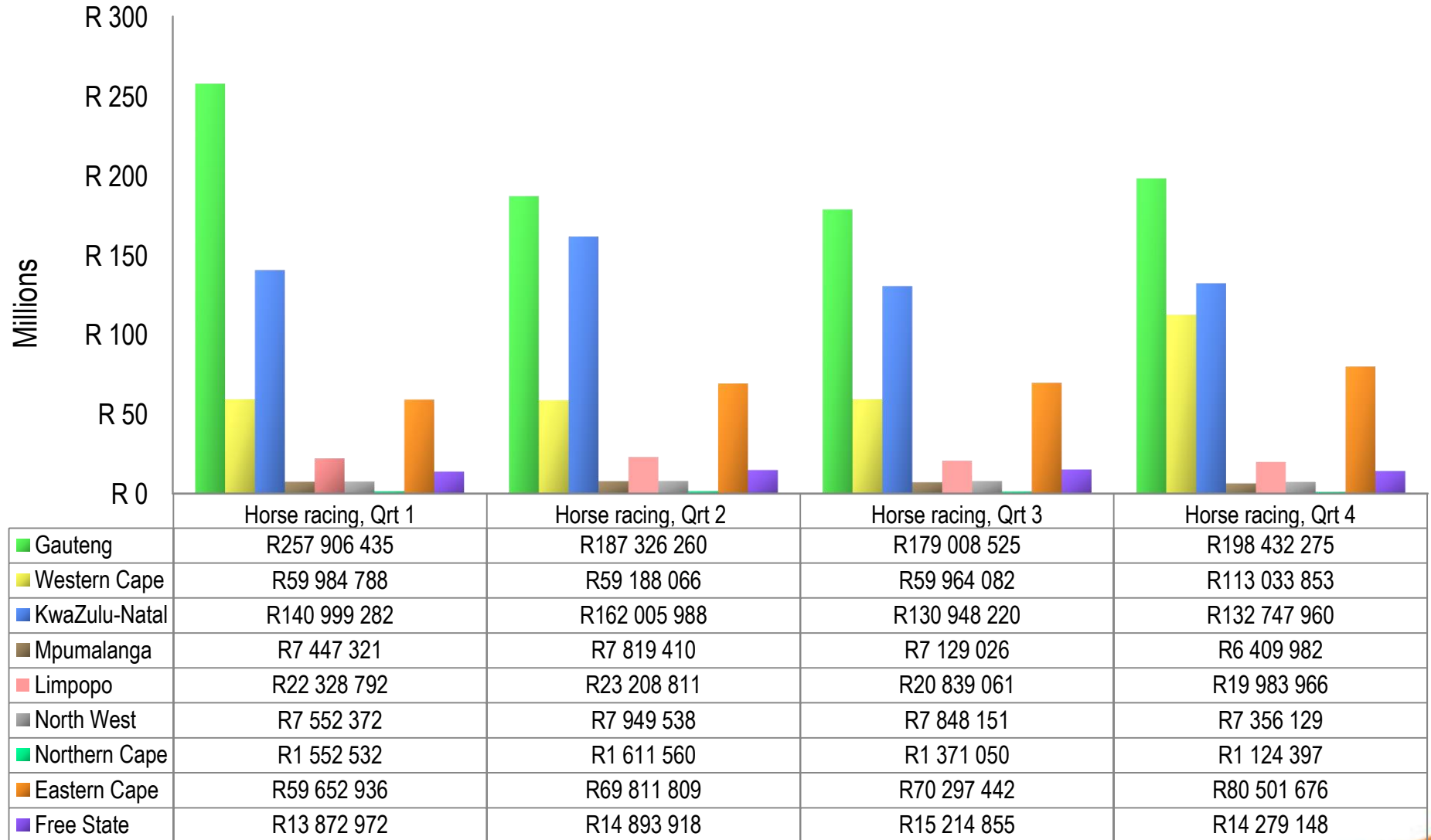


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting GGR – FY2017

Betting on horse racing*

Rand value of the gross revenue by an operator

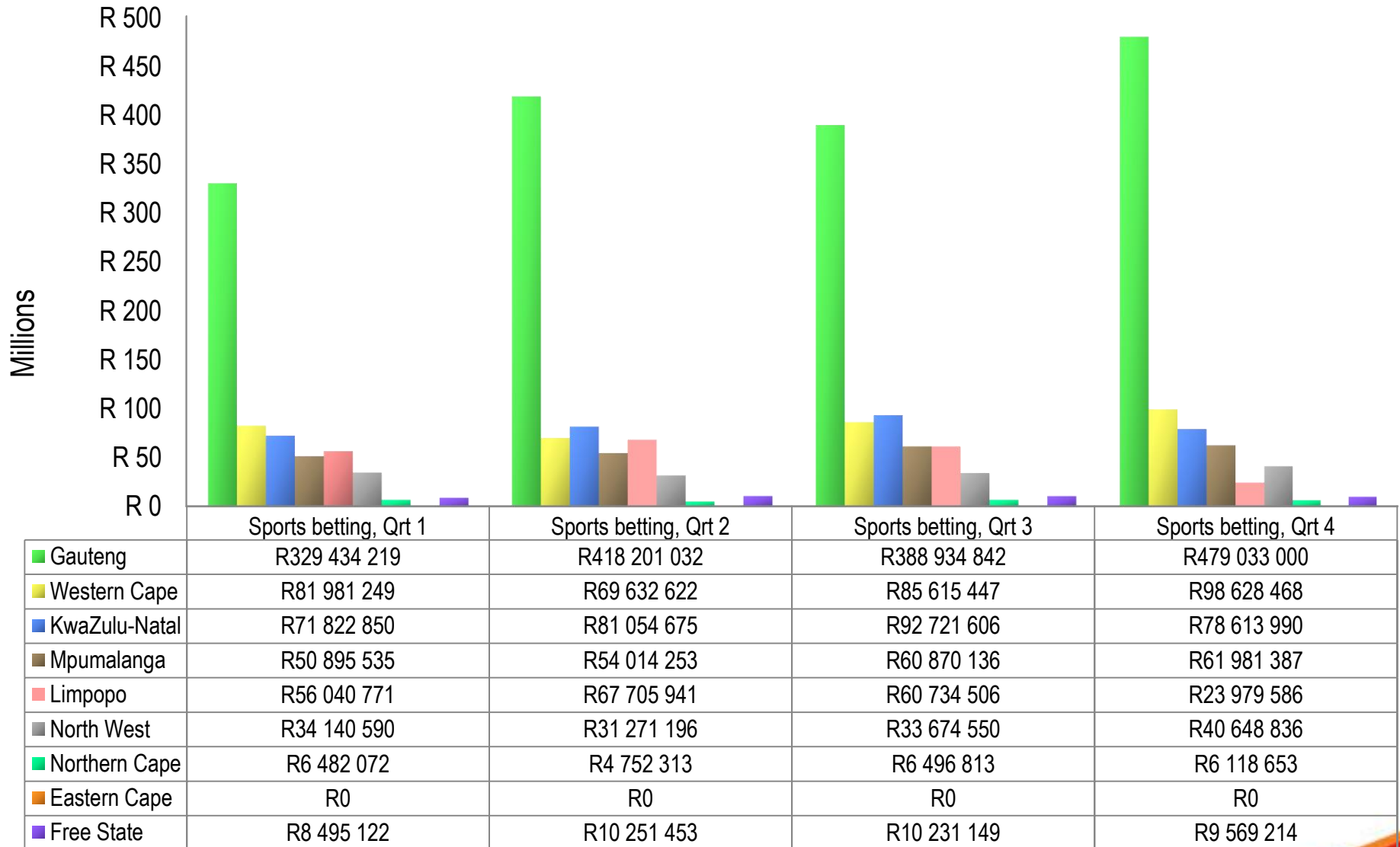


* Eastern Cape: Statistics includes sports betting

Quarterly betting GGR – FY2017*

Betting on sport*

Rand value of the gross revenue by an operator

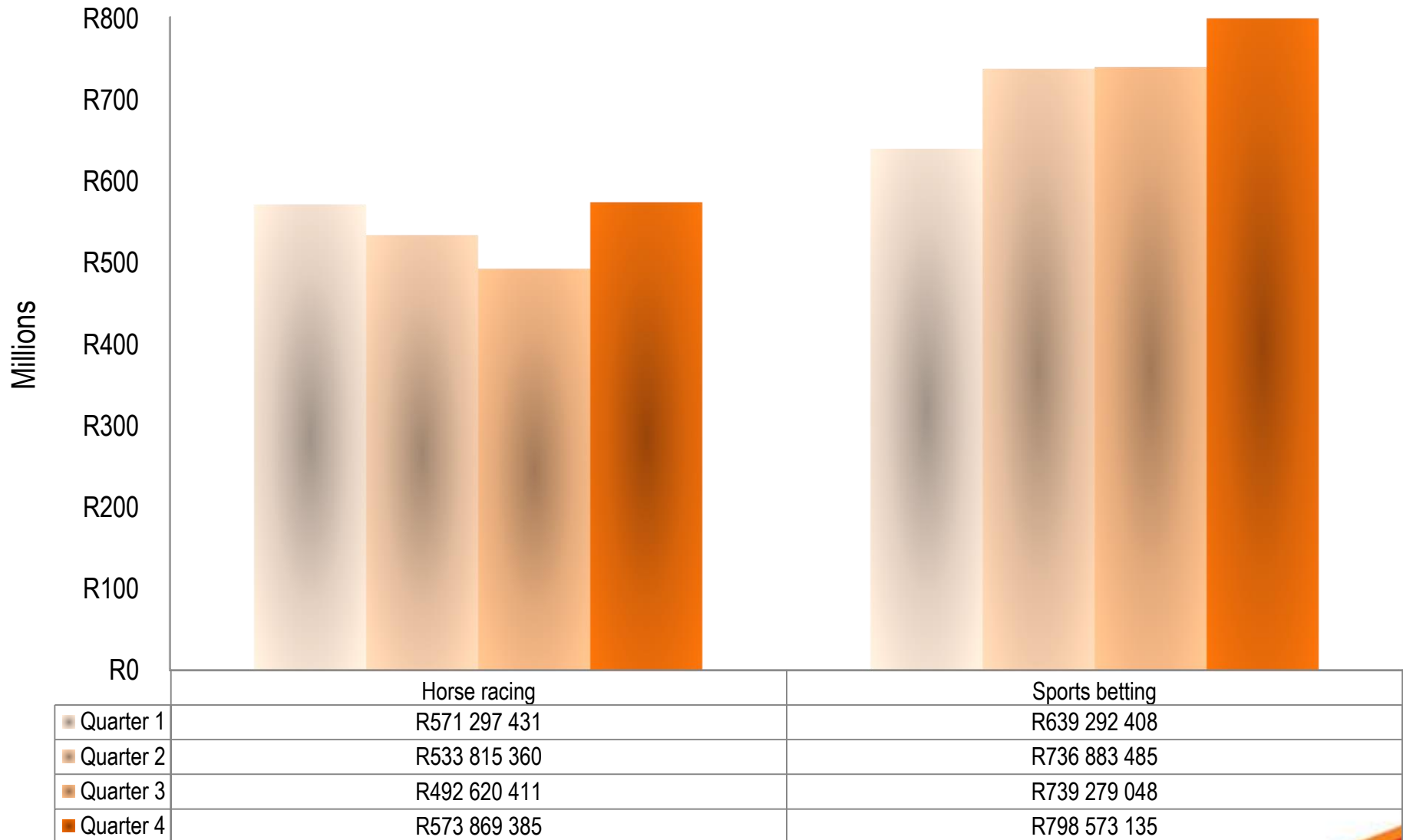


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting GGR – FY2017*

Split between betting on horse racing & sport*

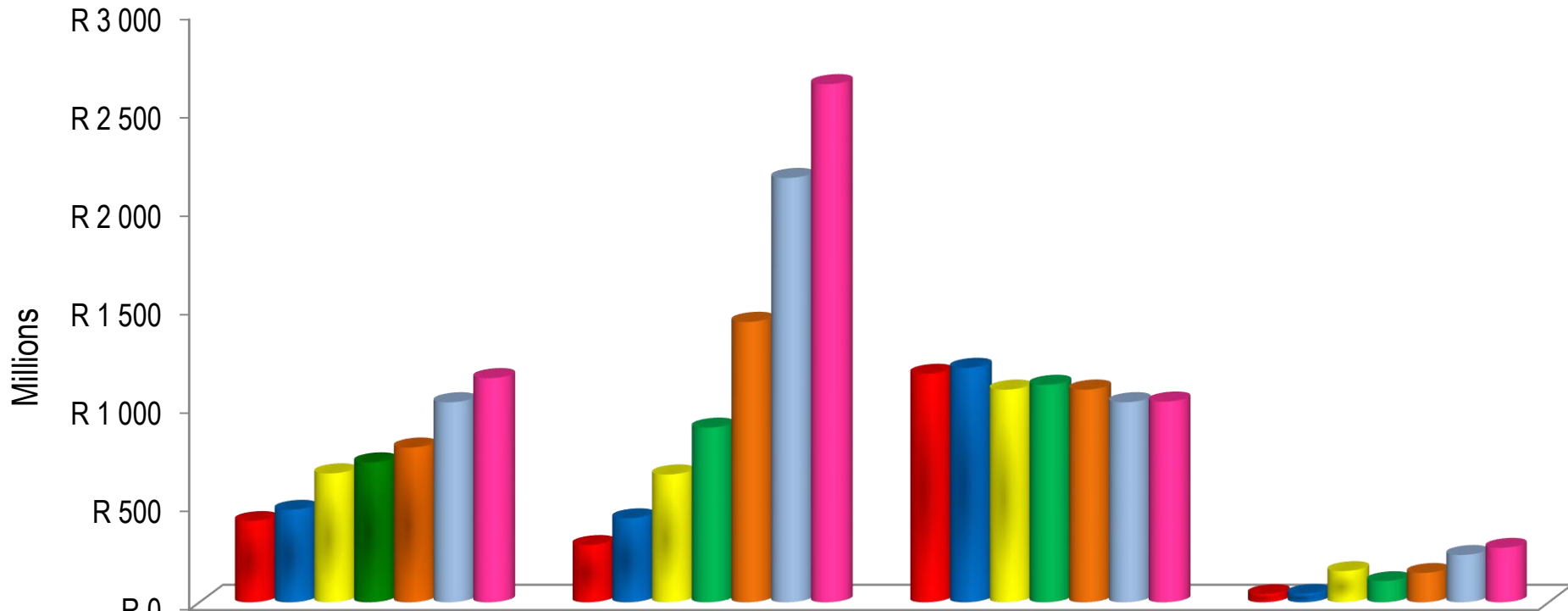
Rand value of the gross revenue by an operator



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

Trend in GGR, bookmakers & totalisators – FY2011 to FY2017

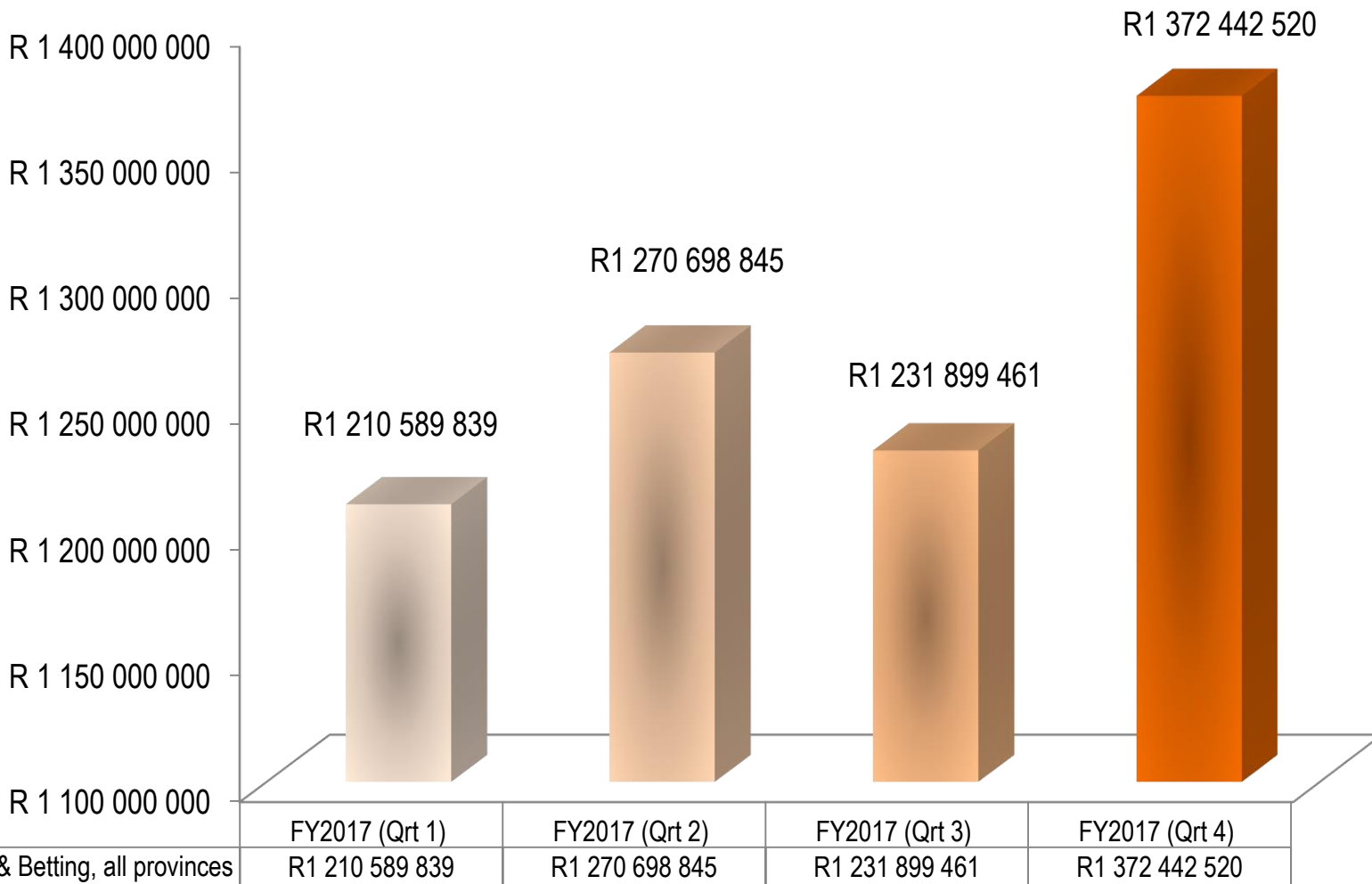
Rand value of the gross revenue by an operator



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
■ FY11	R419 579 088	R295 931 592	R1 167 008 013	R42 418 390
■ FY12	R477 583 160	R433 650 582	R1 197 266 316	R44 078 515
■ FY13	R663 367 356	R657 721 132	R1 087 051 664	R161 294 882
■ FY14	R718 915 378	R894 571 335	R1 111 365 062	R109 251 620
■ FY15	R793 930 124	R1 430 026 112	R1 087 285 775	R151 752 708
■ FY16	R1 023 035 305	R2 157 995 813	R1 023 264 197	R244 470 444
■ FY17	R1 145 152 334	R2 632 669 149	R1 026 450 253	R281 358 927

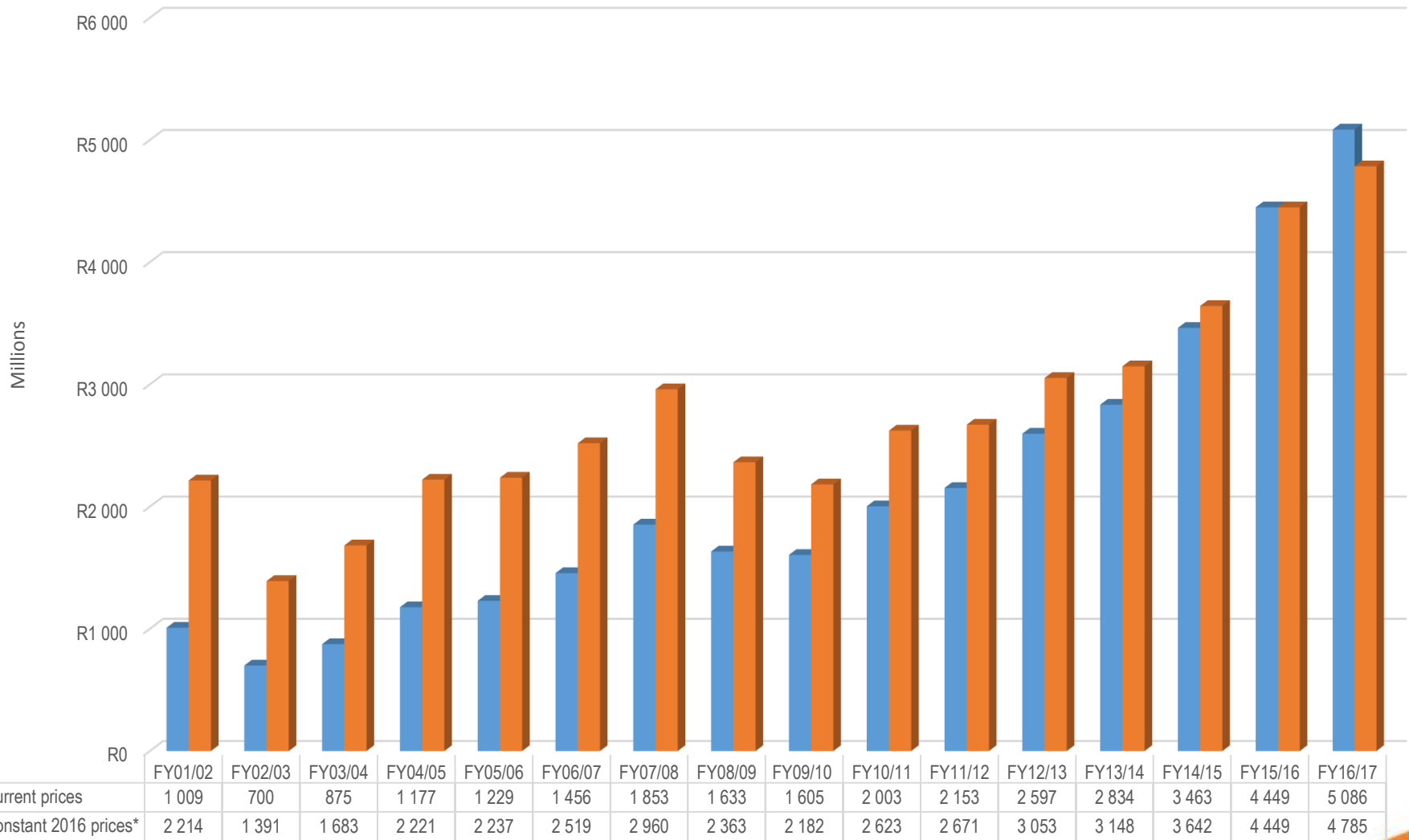
Trend in GGR betting on horse racing & sport – FY2017

Rand value of the gross revenue of an operator



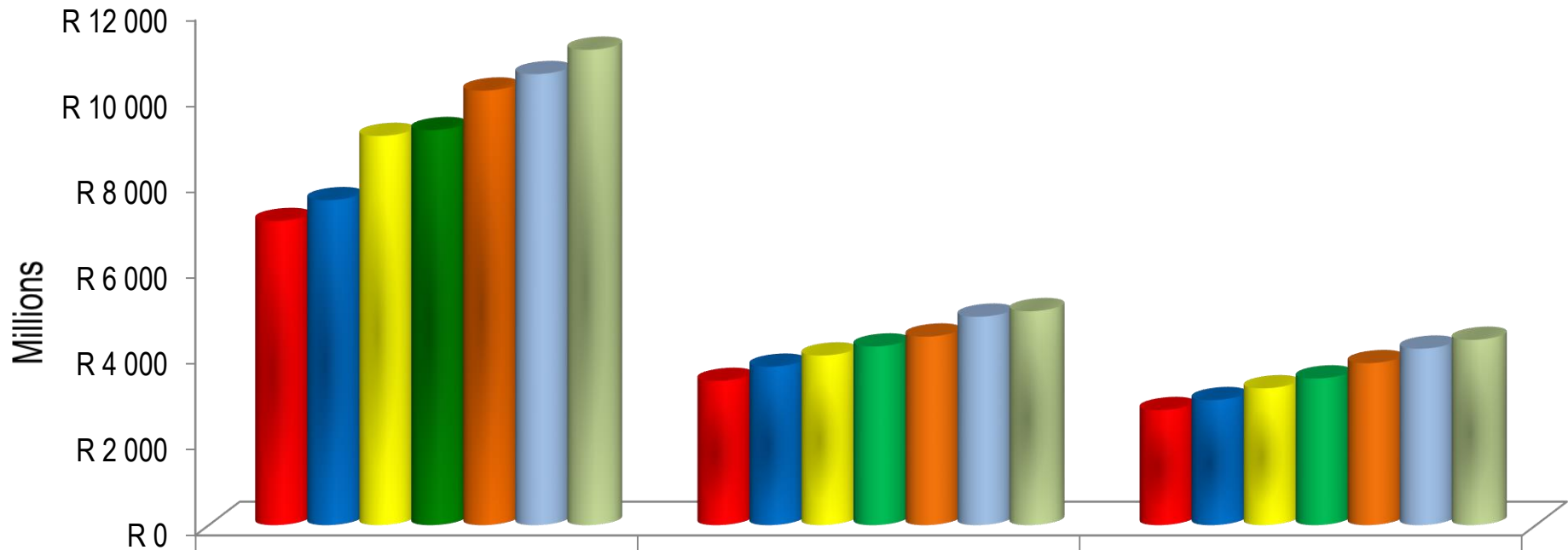
Trend in GGR betting on horse racing & sport – FY2001/02 to FY2016/17

Rand value of the gross revenue by an operator



Trend in GGR, provinces (Gauteng, Western Cape & KwaZulu-Natal) FY2011 to F2017

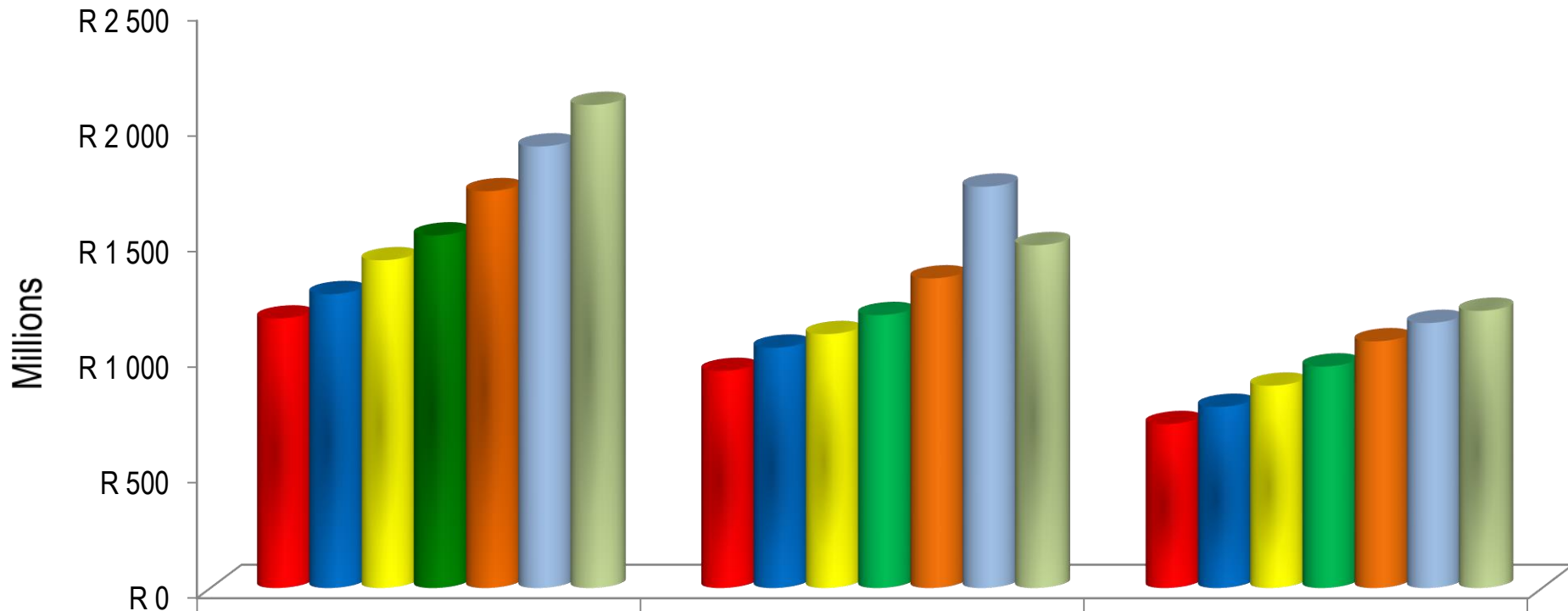
Rand value of the gross revenue by an operator



	Gauteng	KwaZulu-Natal	Western Cape
■ FY2011	R7 082 452 810	R3 355 398 408	R2 675 671 553
■ FY2012	R7 567 711 371	R3 686 097 917	R2 907 215 535
■ FY2013	R9 066 664 048	R3 948 654 707	R3 184 485 271
■ FY2014	R9 202 134 387	R4 157 196 966	R3 412 669 836
■ FY2015	R10 123 160 214	R4 388 844 044	R3 770 074 264
■ FY2016	R10 507 666 088	R4 851 818 256	R4 107 502 338
■ FY2017	R11 074 148 279	R4 981 041 968	R4 312 441 585

Trend in GGR, provinces (Eastern Cape, North West & Mpumalanga) FY2011 to F2017

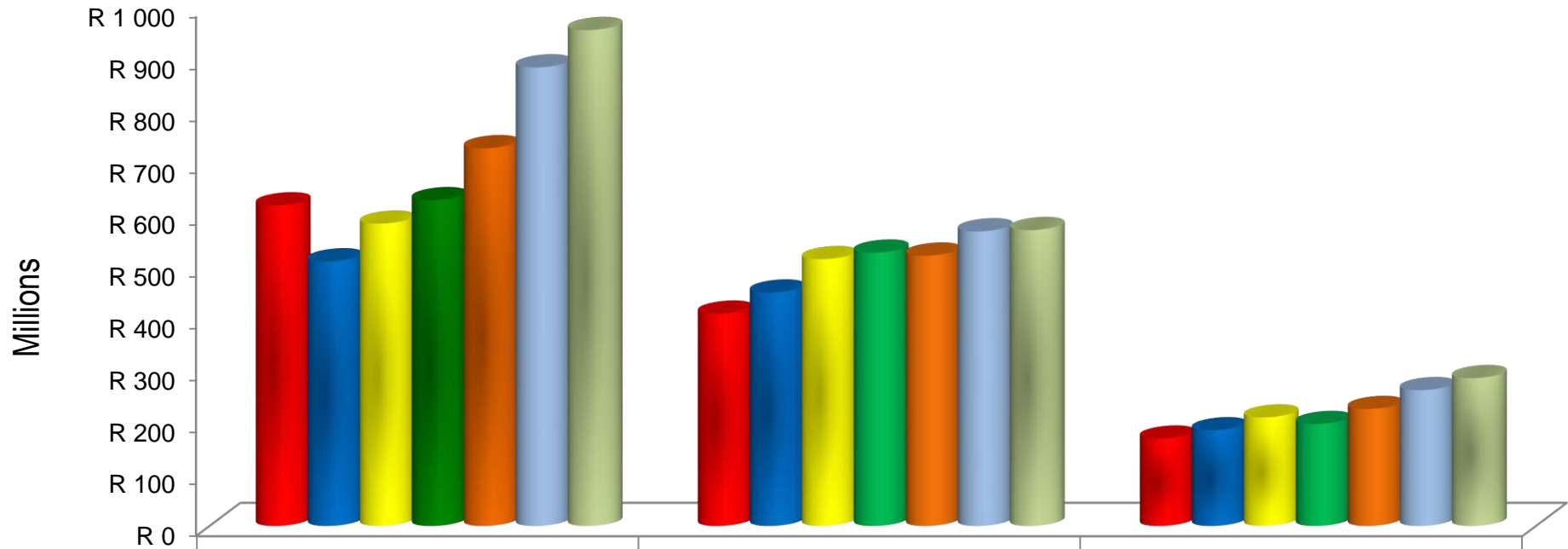
Rand value of the gross revenue by an operator



	Eastern Cape	North West	Mpumalanga
■ FY2011	R1 169 615 841	R943 127 643	R713 976 657
■ FY2012	R1 274 855 763	R1 043 562 540	R788 130 624
■ FY2013	R1 421 297 898	R1 102 412 569	R879 851 038
■ FY2014	R1 528 261 511	R1 184 482 349	R962 527 586
■ FY2015	R1 719 125 892	R1 342 862 301	R1 071 347 869
■ FY2016	R1 912 406 423	R1 738 804 648	R1 150 415 279
■ FY2017	R2 091 579 565	R1 486 090 205	R1 202 795 496

Trend in GGR, provinces (Limpopo, Free State & Northern Cape) FY2011 to F2017

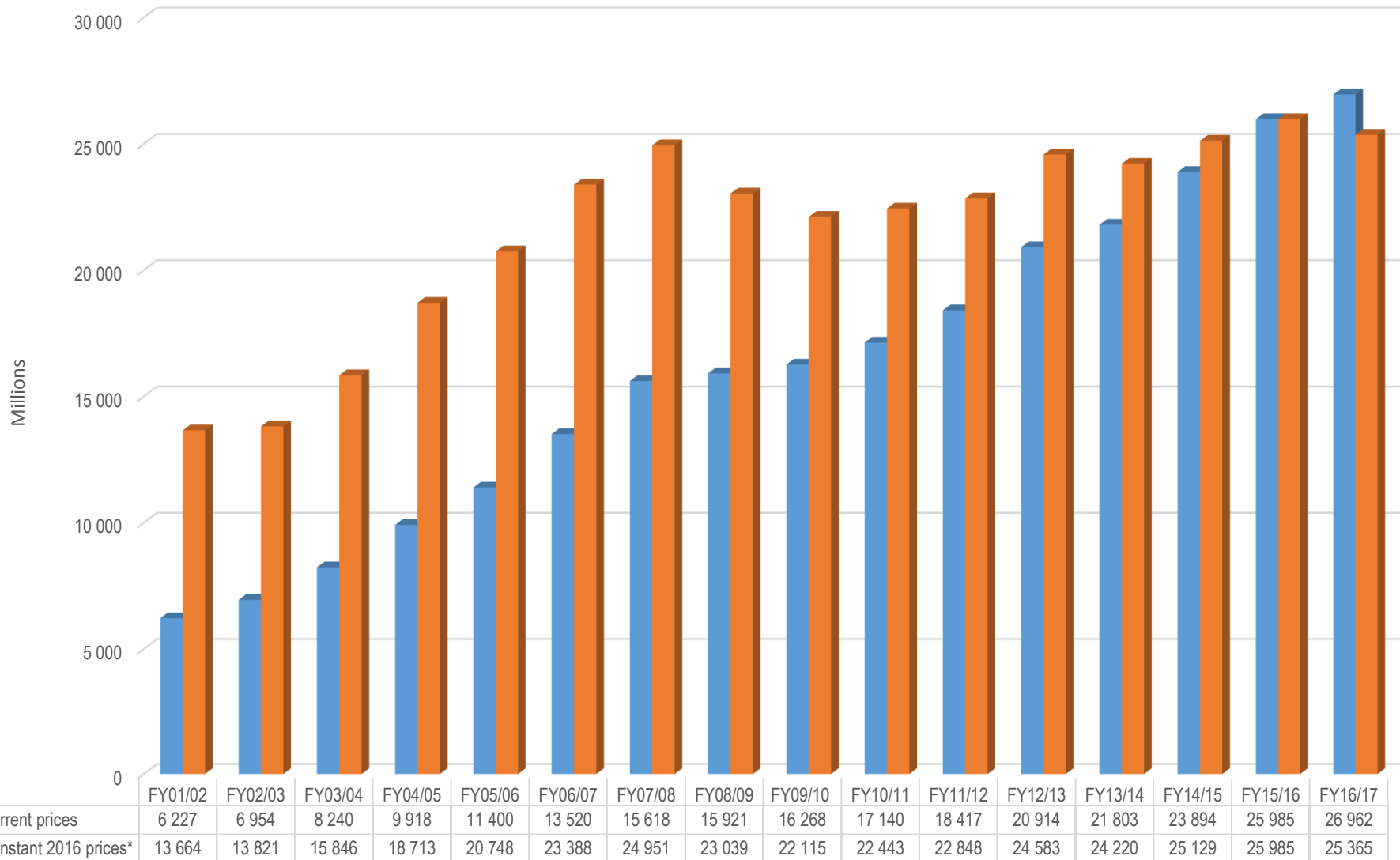
Rand value of the gross revenue by an operator



	Limpopo	Free State	Northern Cape
■ FY2011	R618 720 021	R410 821 389	R170 303 423
■ FY2012	R511 218 432	R451 313 156	R186 473 253
■ FY2013	R583 756 508	R515 560 127	R211 461 155
■ FY2014	R628 657 070	R528 029 708	R198 709 419
■ FY2015	R728 438 960	R522 271 456	R227 809 270
■ FY2016	R883 599 182	R568 893 266	R264 014 108
■ FY2017	R955 363 219	R571 329 455	R287 098 788

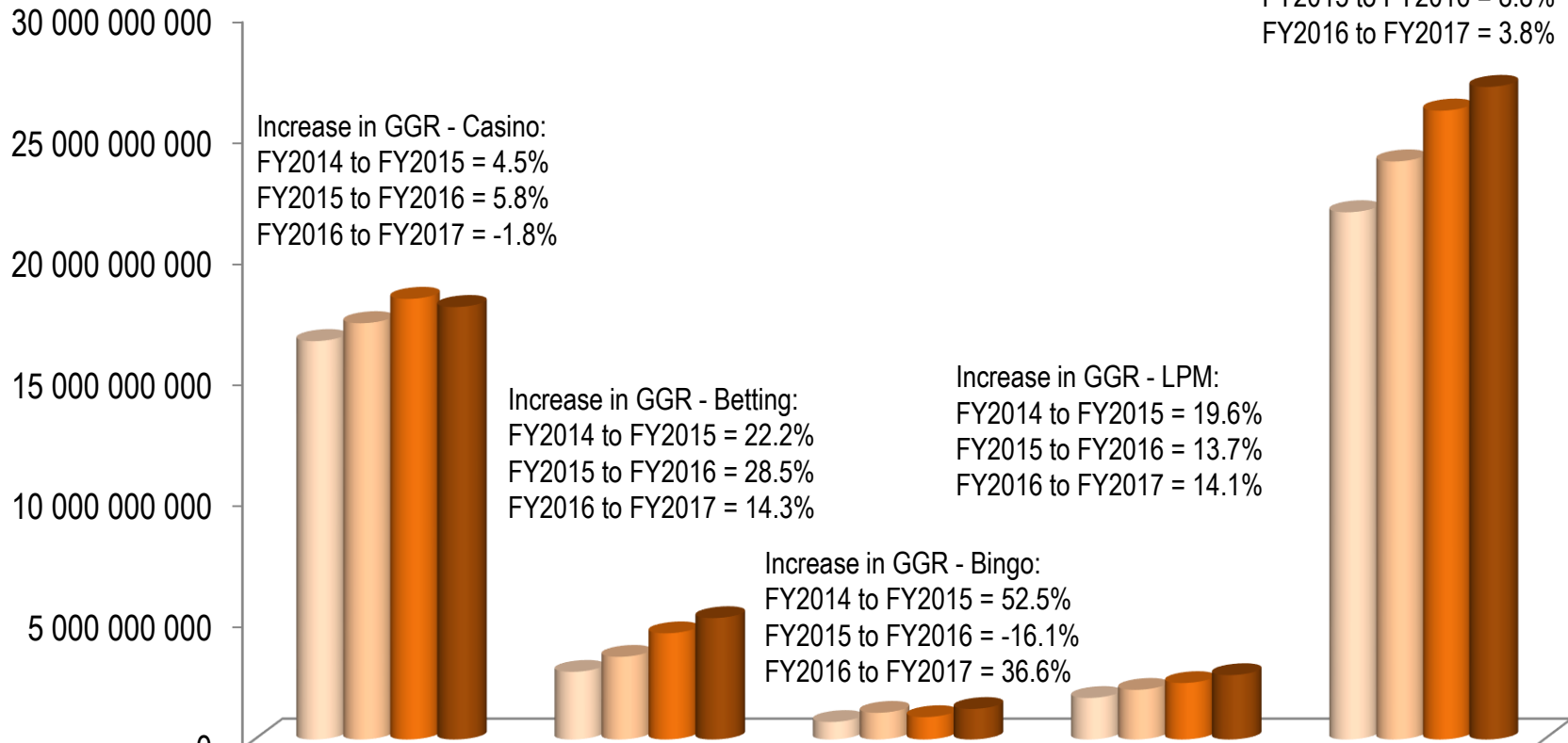
Trend in GGR – FY2001/02 to FY2016/17 (all modes and provinces)

Rand value of the gross revenue by an operator



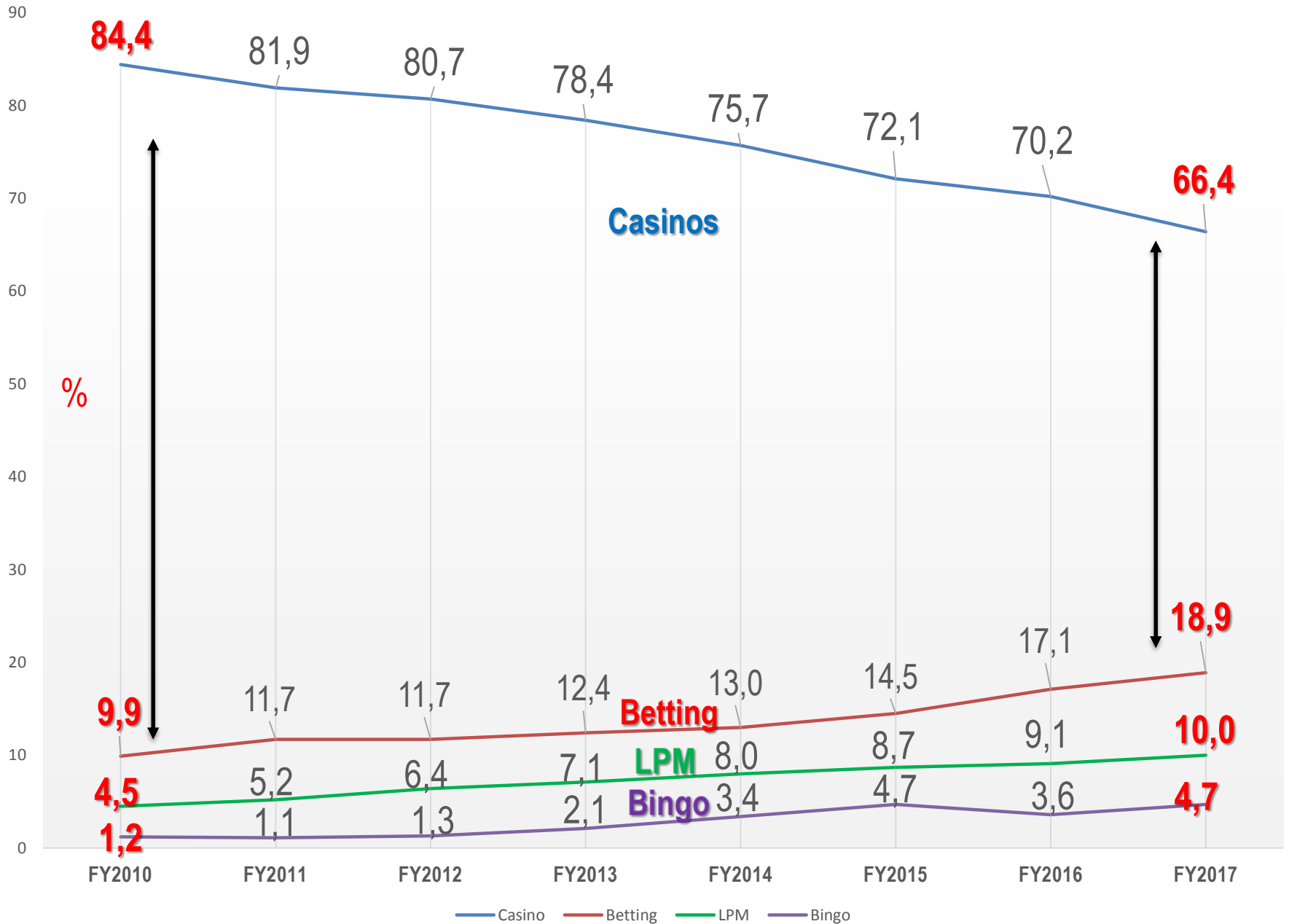
Increase in GGR (all modes): FY2014 – FY2017

Increase in GGR – Total:
 FY2014 to FY2015 = 9.6%
 FY2015 to FY2016 = 8.8%
 FY2016 to FY2017 = 3.8%



	GGR Casino	GGR Betting	GGR Bingo	GGR LPM	TOTAL
■ GGR, FY2014	16 497 594 915	2 834 103 394	732 321 861	1 738 648 662	21 802 668 831
■ GGR, FY2015	17 234 928 081	3 462 994 717	1 116 673 081	2 079 338 389	23 893 934 269
■ GGR, FY2016	18 236 685 695	4 448 765 756	936 166 348	2 363 501 788	25 985 119 588
■ GGR, FY2017	17 900 747 071	5 085 630 664	1 278 664 383	2 696 846 443	26 961 888 560

Trend in GGR, comparison all modes (FY2010-FY2017)



Real GGR growth rate and Real GDP growth rate FY2016 to F20Y17

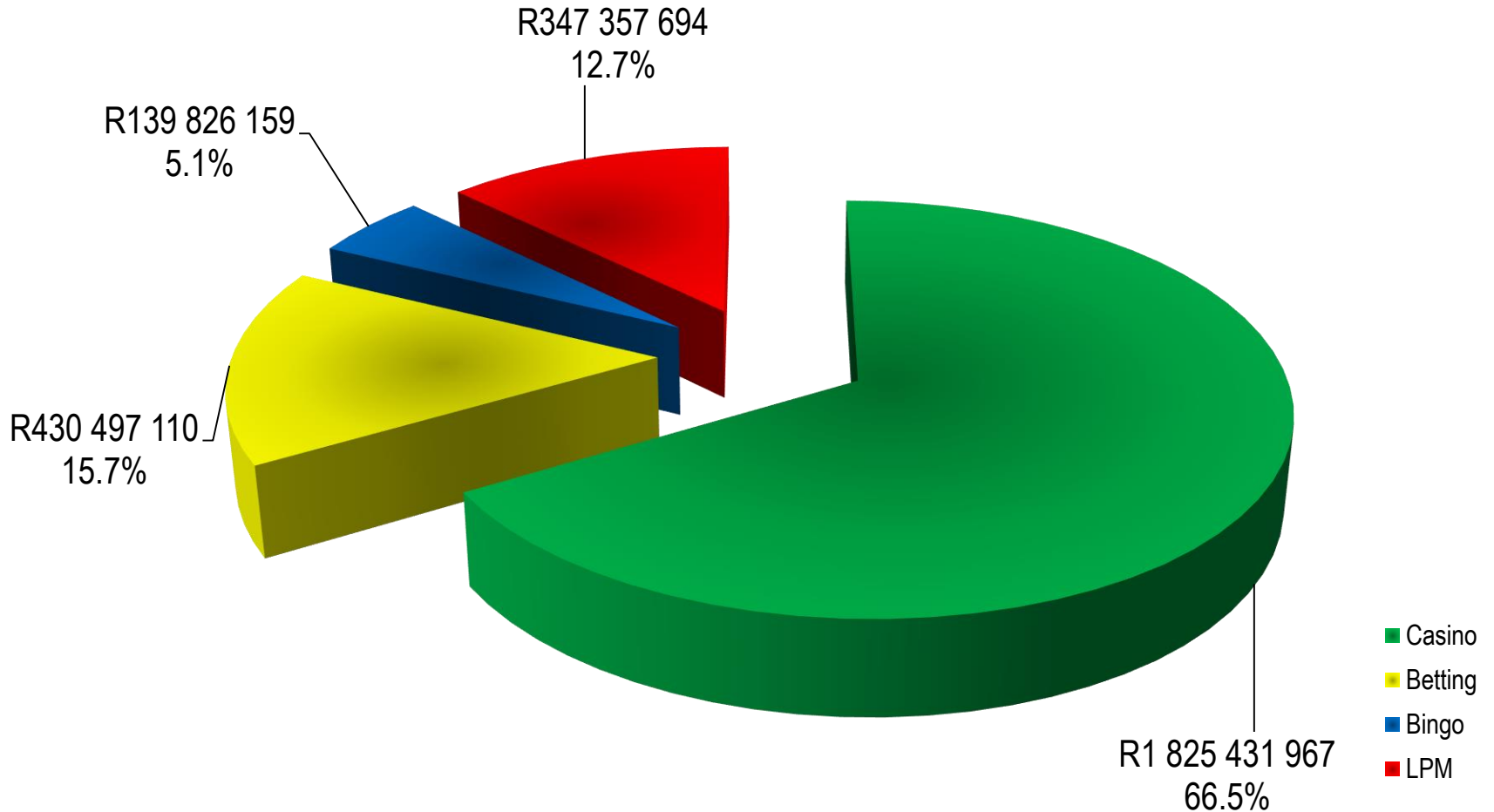


Summary : GGR

- ❑ GGR increased by 9.6% from R 21,8 billion in FY2014 to R 23,9 billion in FY2015, by 8.8% to R26.0 billion in FY2016, and by 3.8% to R27.0 billion in FY2017. A total amount of R 26 961 888 560 referred to as GGR was generated during FY2017.
- ❑ In real terms however, the GGR increased by 3.8% in FY2015, by 3.4% in FY2016 and decreased by 2.4% in FY2017.
- ❑ During FY2017, casinos accounted for the highest GGR being 66.4% as compared to other gambling modes. The percentage GGR generated by casinos (compared to other sectors) showed a declining trend from FY2010 (84.4%) to FY2017 (66.4), as a result of growth in other gambling sectors.
- ❑ Compared to all other provinces, Gauteng at a 41.1% share, accounted for the highest amount of GGR generated in FY2017, compared to KwaZulu-Natal (18.5%) and the Western Cape (16.0%).
- ❑ Although Gauteng generated the highest amount of GGR relative to casinos (41.2%), betting on horse racing and sport (47.9%), and bingo (63.6%), the highest amount of GGR was generated in the LPM sector in Western Cape (29.2%) in FY2017.

Taxes/levies contribution per gambling mode – FY2017

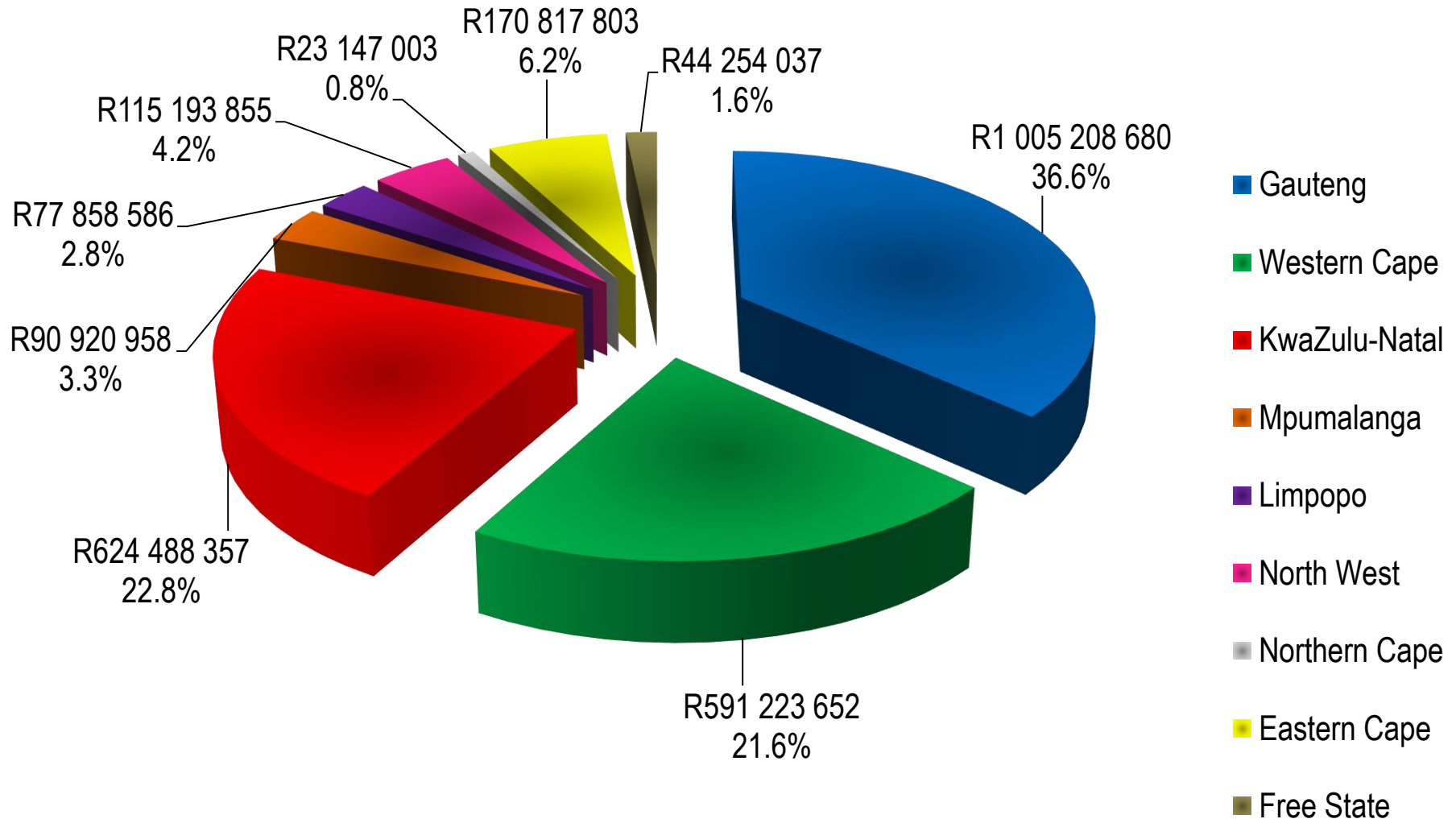
Gambling tax levied and collected by PLAs



Total taxes/levies: R 2 743 112 930

Taxes/levies contribution per province – FY2017

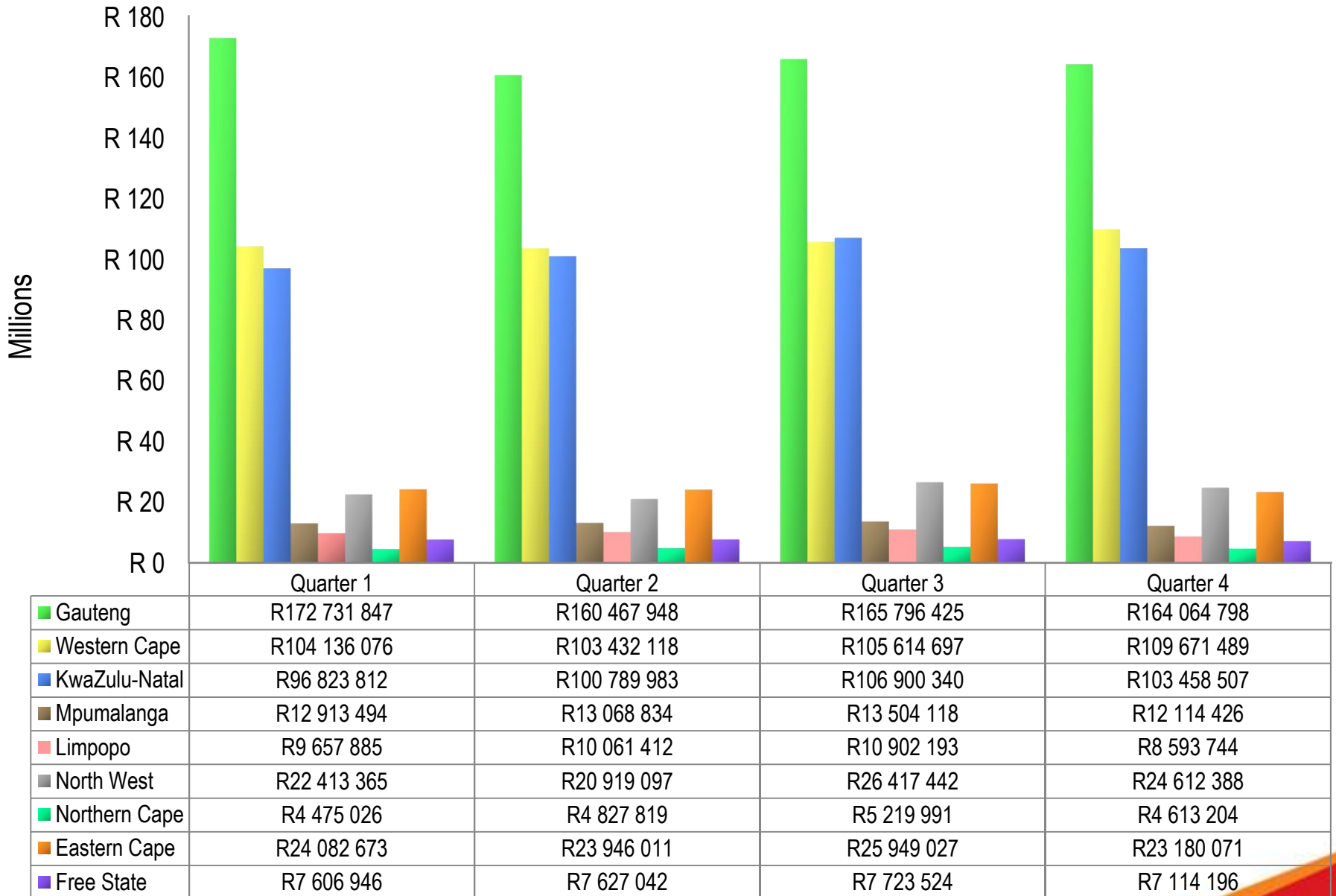
Gambling tax levied and collected by PLAs



Total taxes/levies: R 2 743 112 930

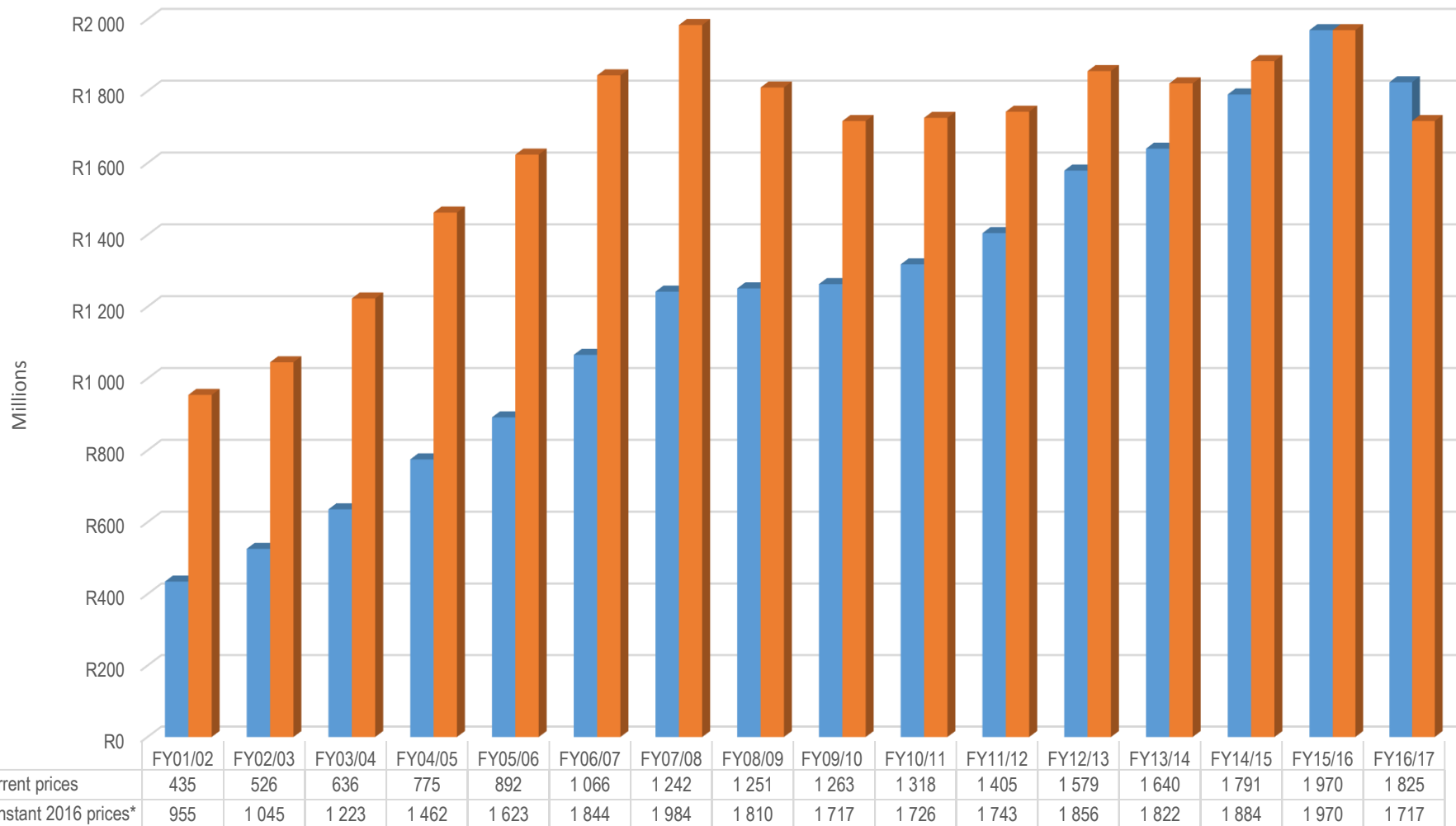
Quarterly casino taxes/levies - FY2017

Gambling tax levied and collected by PLAs



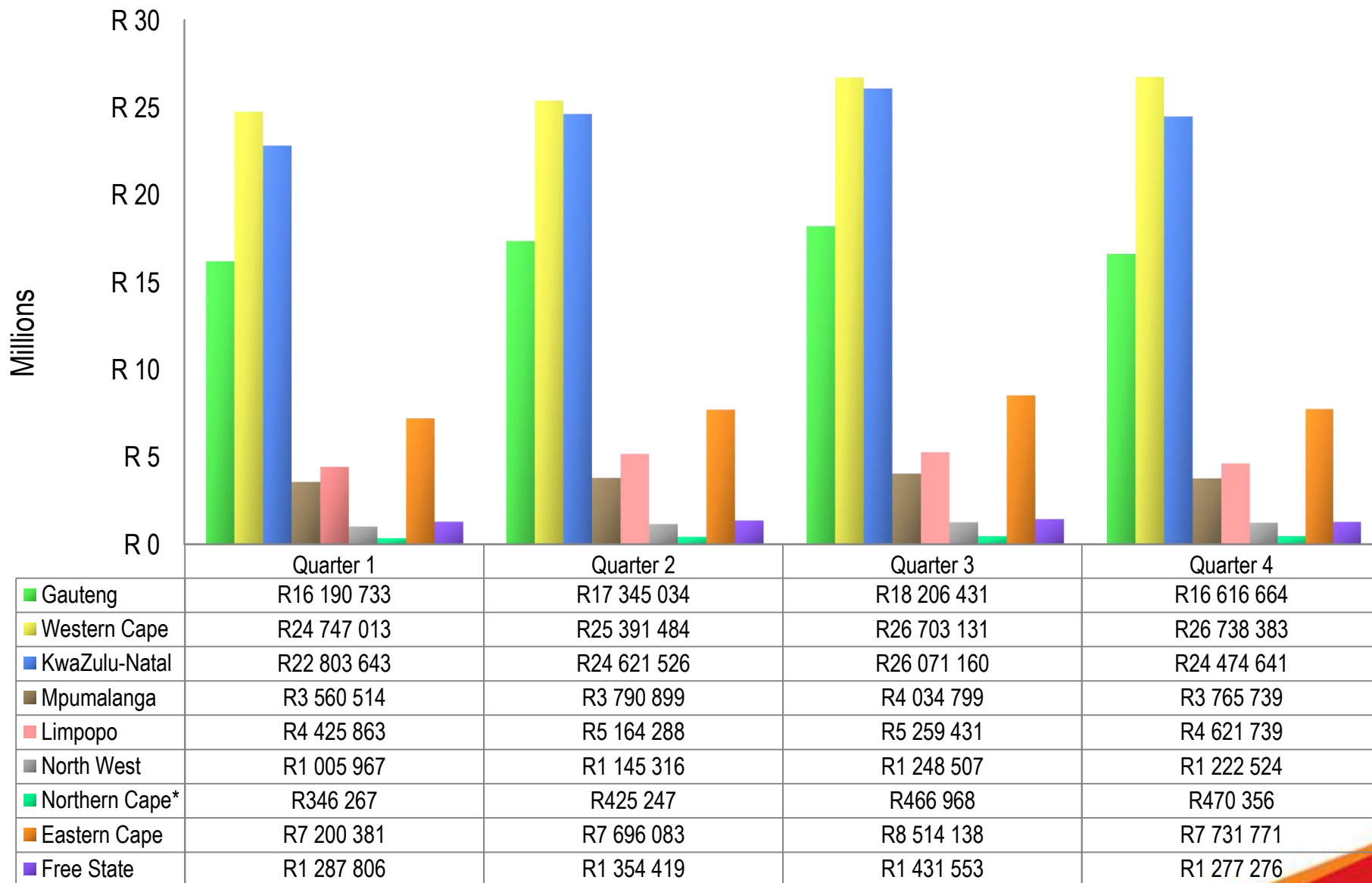
Trend in casino, taxes/levies – FY2001/02 to FY2016/17

Gambling tax levied and collected by PLAs



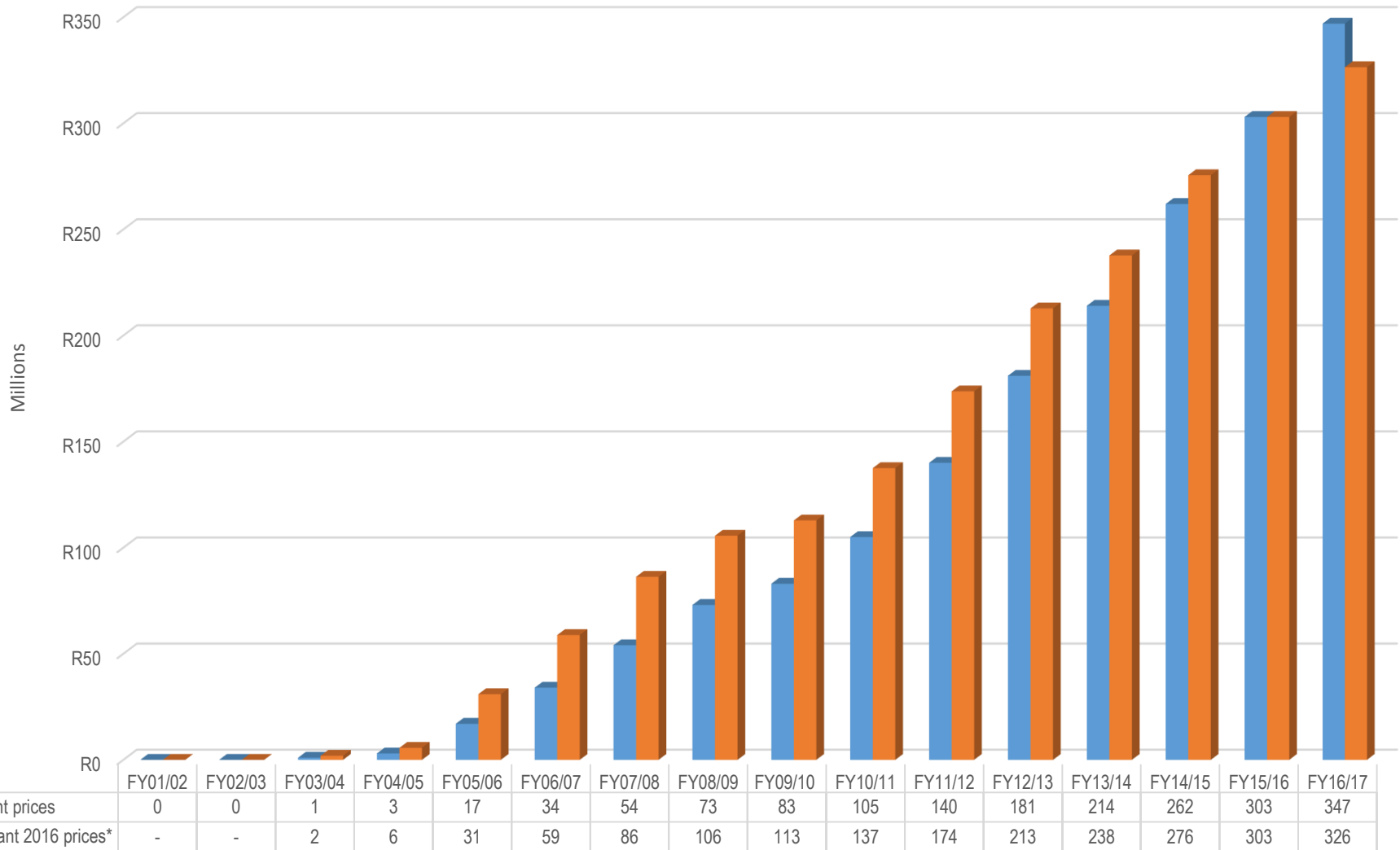
Quarterly LPM taxes/levies - FY2017

Gambling tax levied and collected by PLAs



Trend in LPM taxes/levies – FY2001/02 to FY2016/17

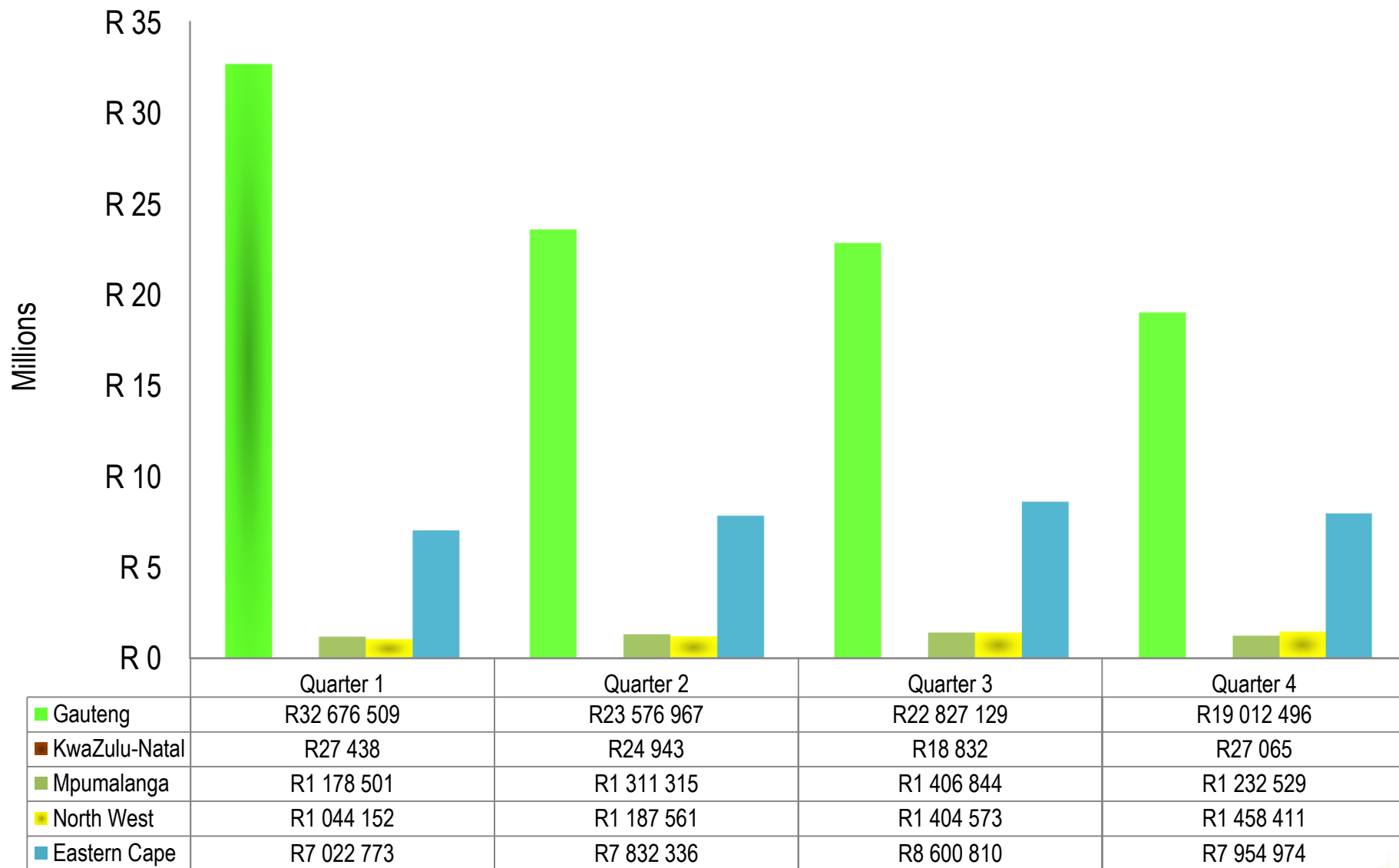
Gambling tax levied and collected by PLAs



2016 constant prices, Reserve Bank

Quarterly bingo taxes/levies - FY2017*

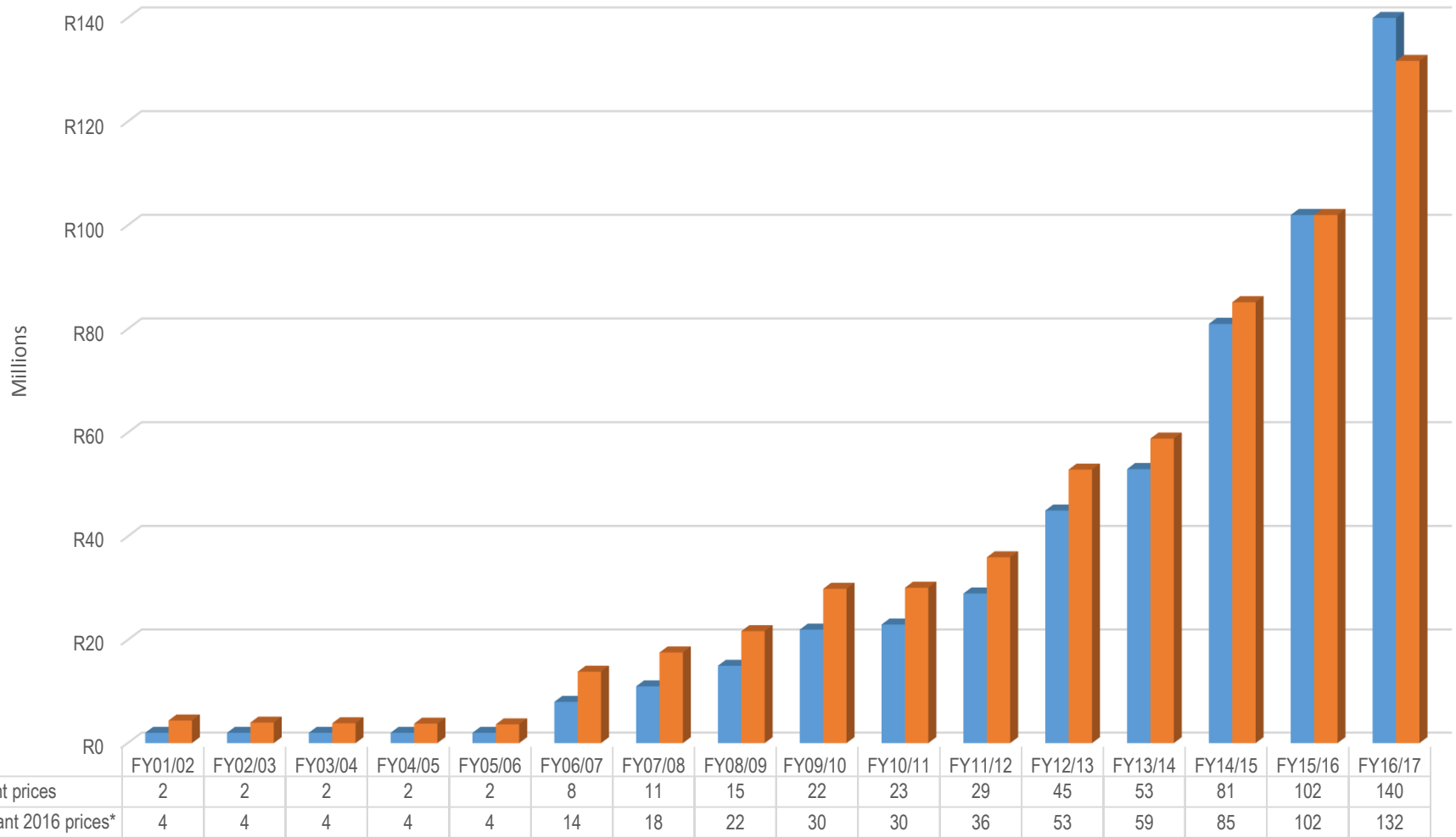
Gambling tax levied by and collected by PLAs



- 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 FY2016/17

Gambling tax levied by and collected by PLAs



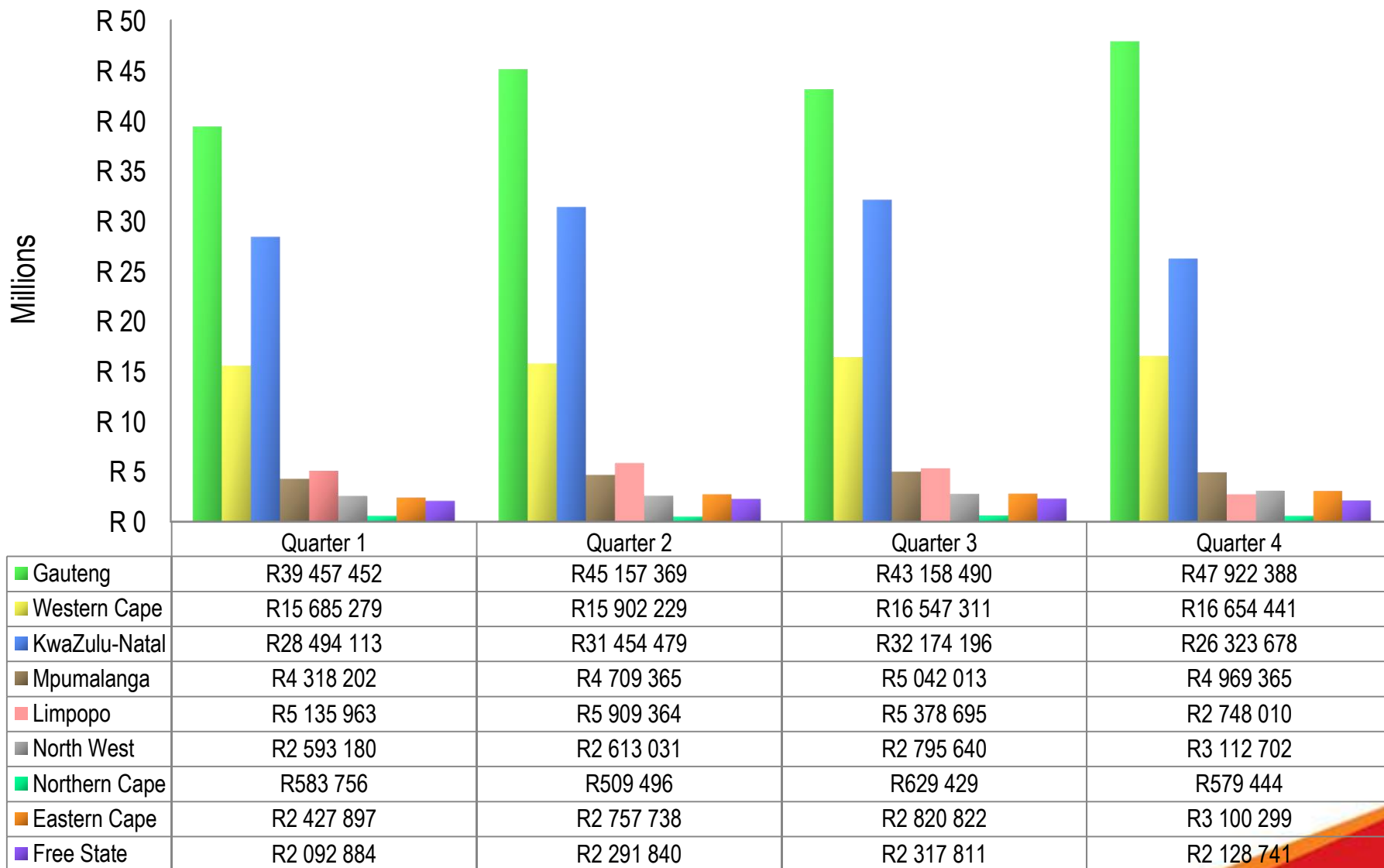
2016 constant prices, Reserve Bank

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

Quarterly betting taxes/levies – FY2017

Bookmakers & Totalisators

Gambling tax levied and collected by PLAs

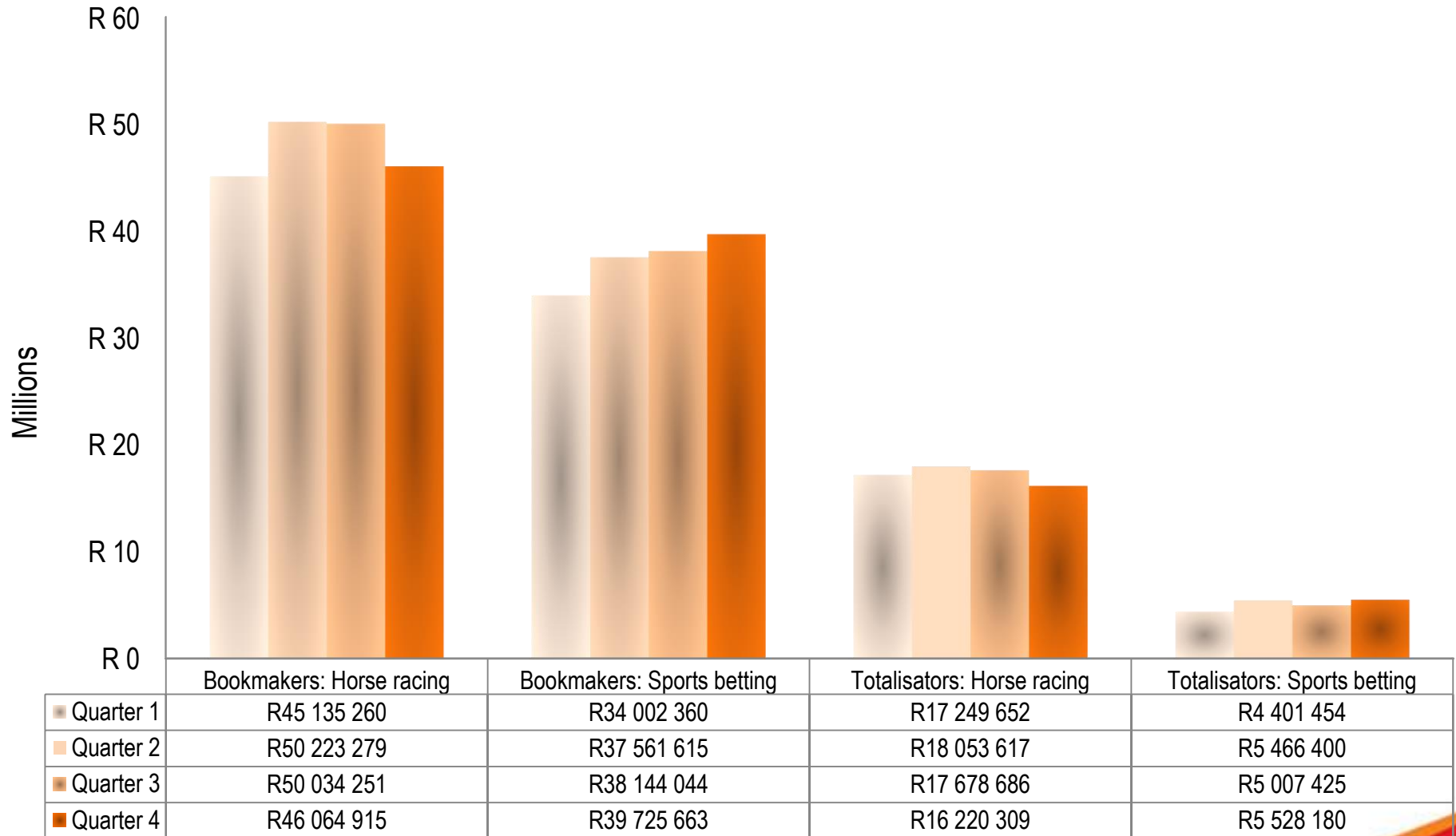


Quarterly betting taxes/levies – FY2017

Split between Bookmakers & Totalisators

Betting on horse racing & sport

Gambling tax levied and collected by PLAs

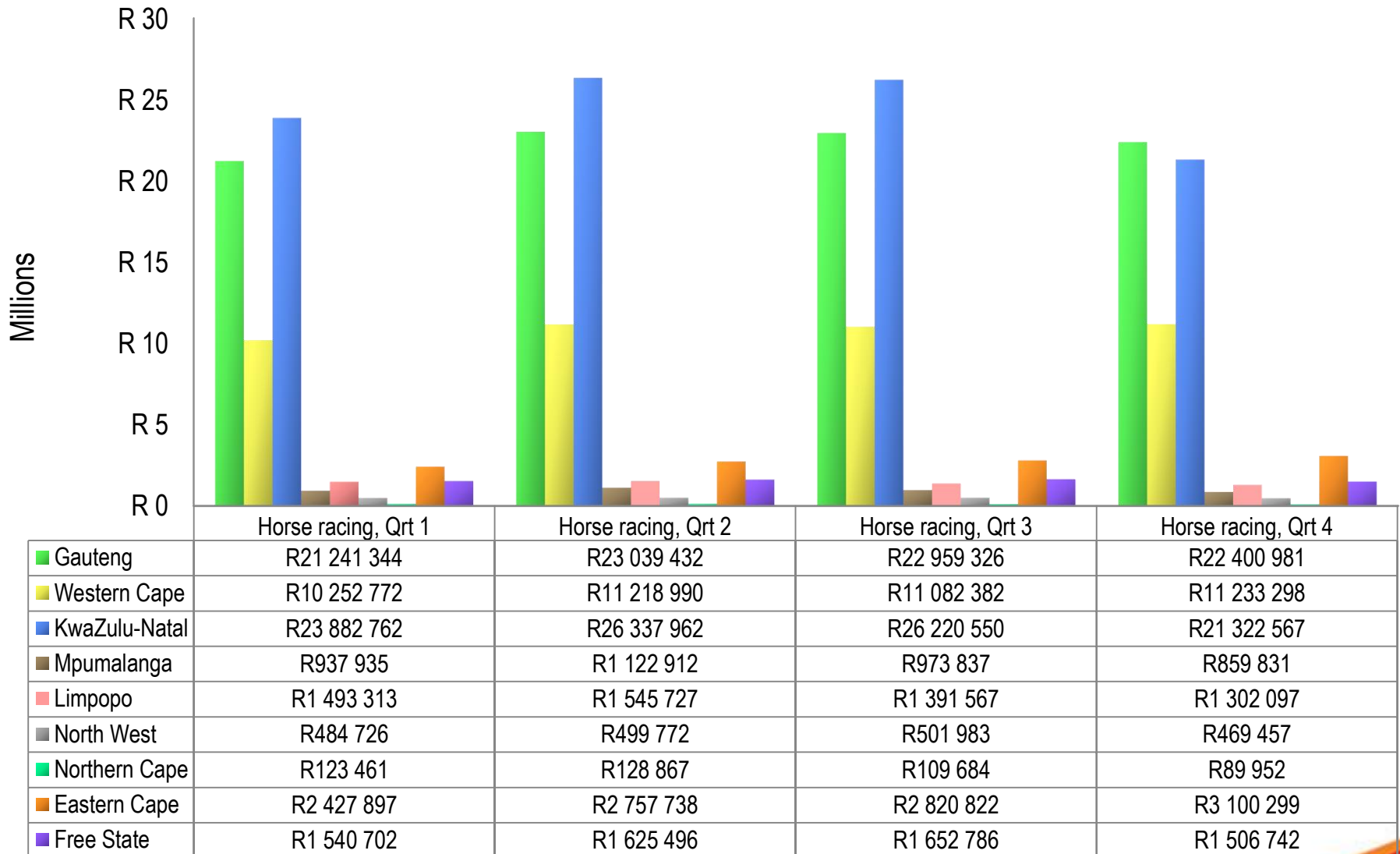


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting taxes/levies – FY2017

Betting on horse racing*

Gambling tax levied by and collected by PLAs

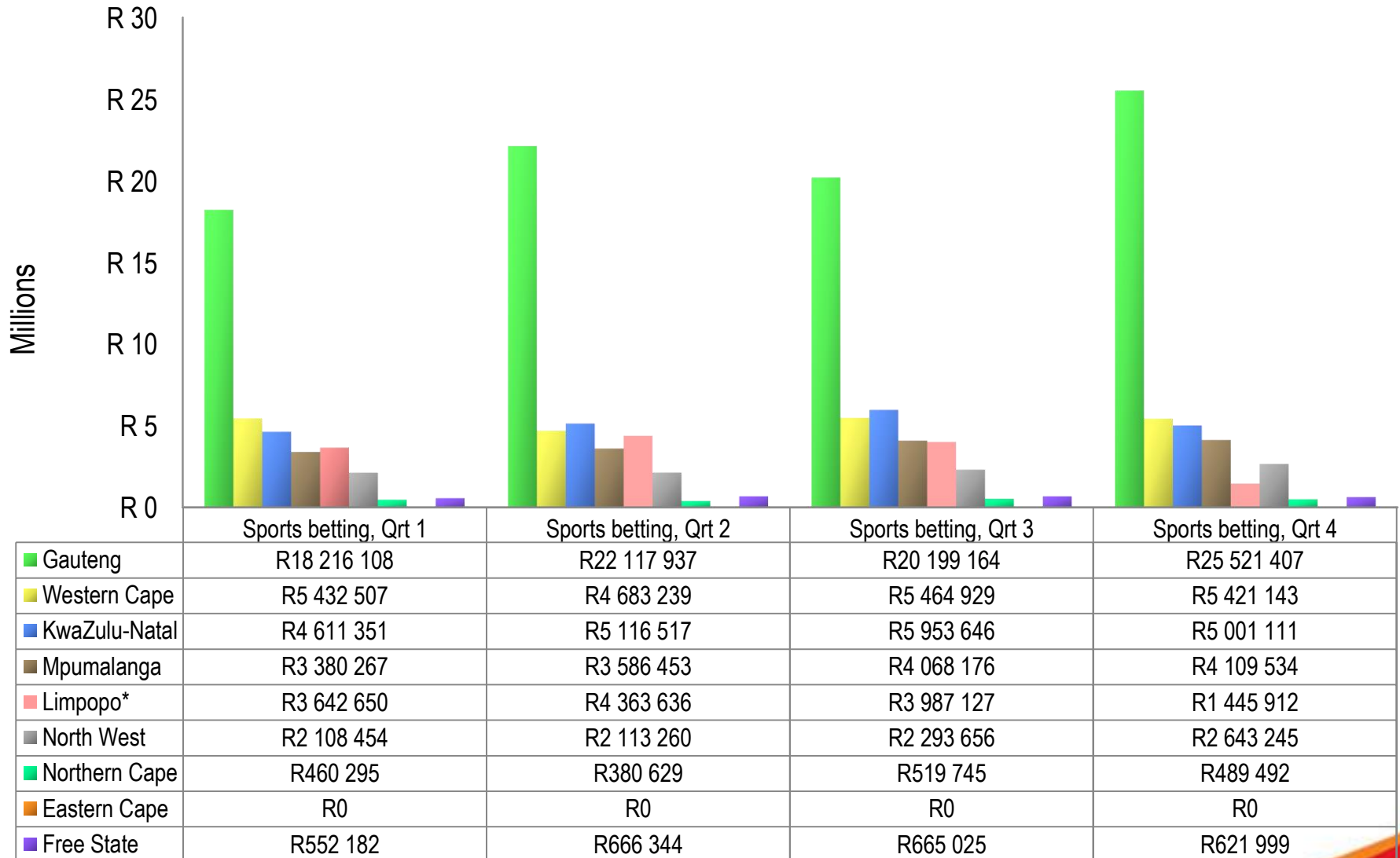


* Eastern Cape: Statistics includes sports betting

Quarterly betting taxes/levies – FY2017

Betting on sport*

Gambling tax levied and collected by PLAs

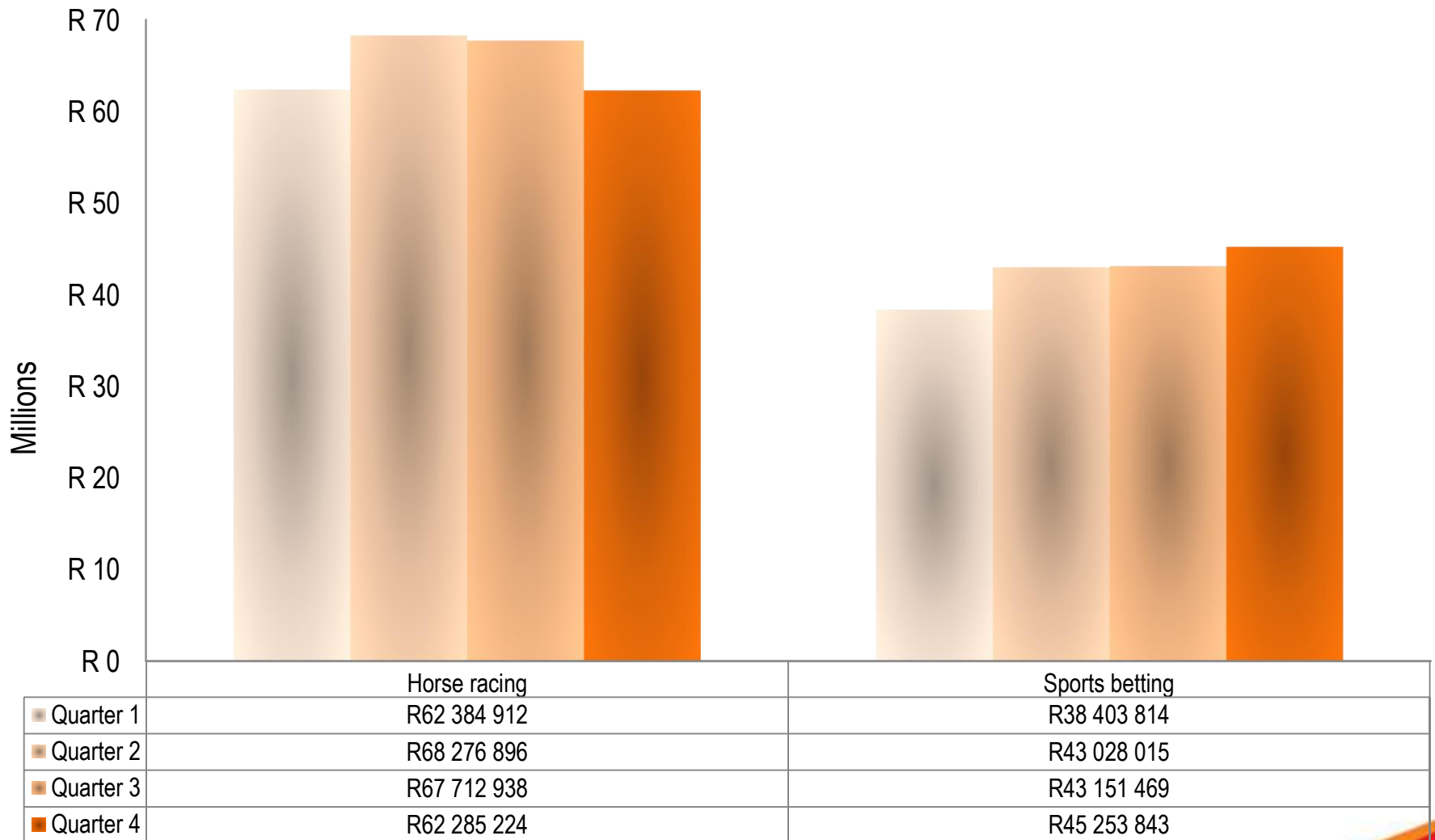


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting taxes/levies – FY2017

Split between betting on horse racing & sport

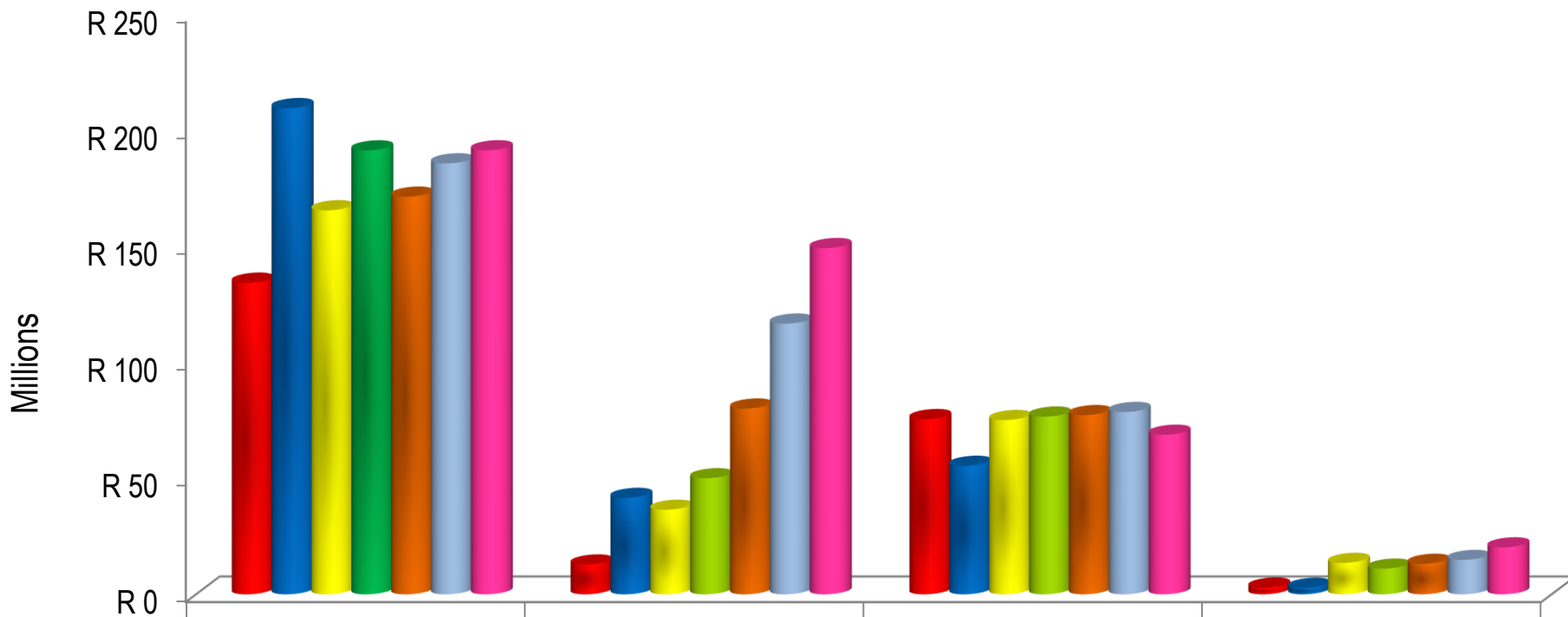
Gambling tax levied and collected by PLAs



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

Trend in taxes/levies, bookmakers & totalisators, FY2011 to FY2017

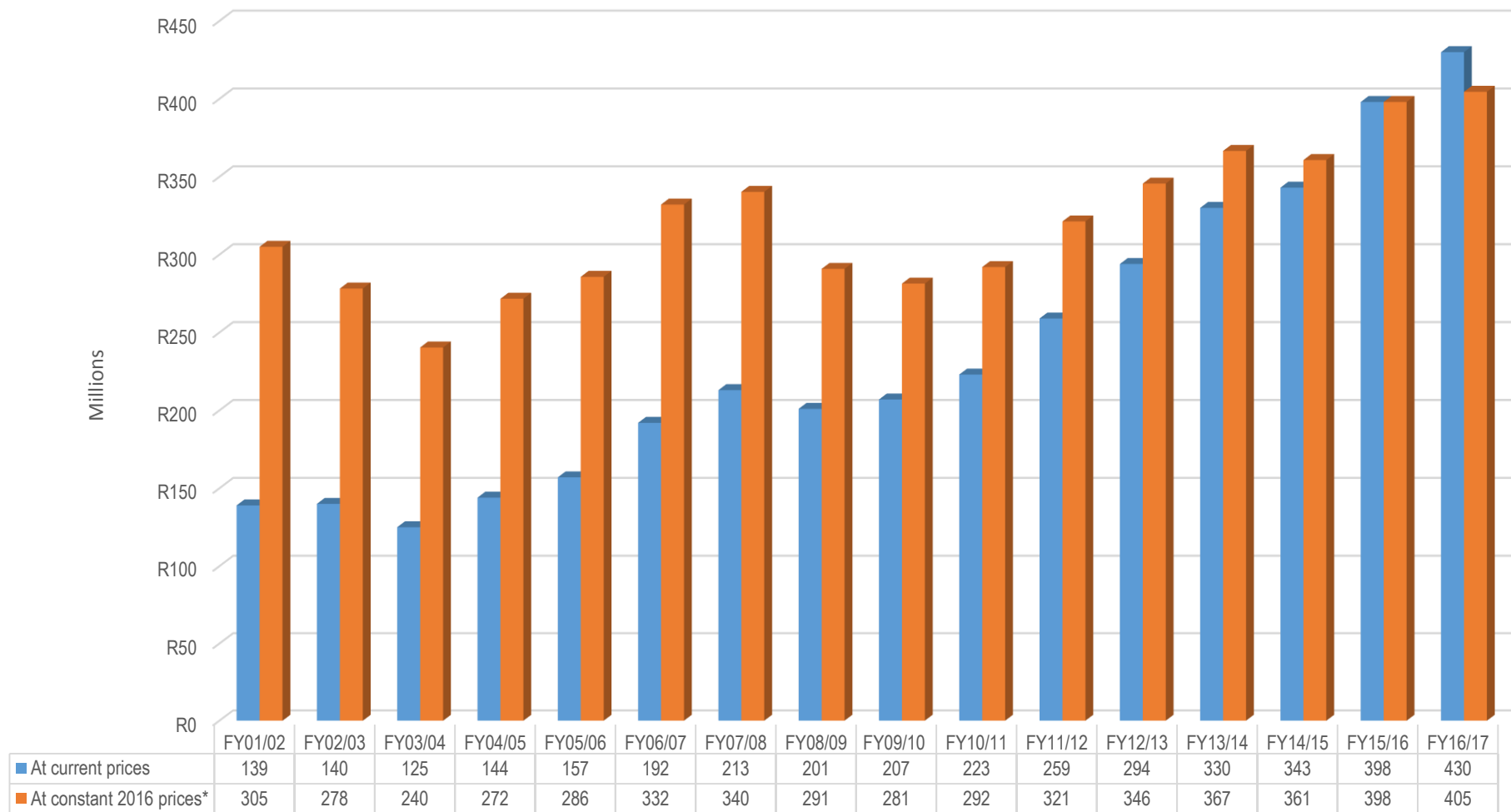
Gambling tax levied and collected by PLAs



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
■ FY2011	R134 575 958	R12 953 552	R75 922 407	R2 923 298
■ FY2012	R209 605 256	R41 900 245	R55 833 557	R2 803 829
■ FY2013	R165 681 993	R36 730 060	R75 524 452	R13 654 952
■ FY2014	R191 426 209	R50 436 312	R77 014 901	R11 153 955
■ FY2015	R171 539 696	R80 477 317	R77 654 988	R13 256 731
■ FY2016	R185 853 671	R116 983 455	R78 996 242	R14 942 372
■ FY2017	R191 457 705	R149 433 682	R69 202 264	R20 403 459

Trend in betting taxes/levies – FY2001/02 to FY2016/17

Gambling tax levied and collected by PLAs

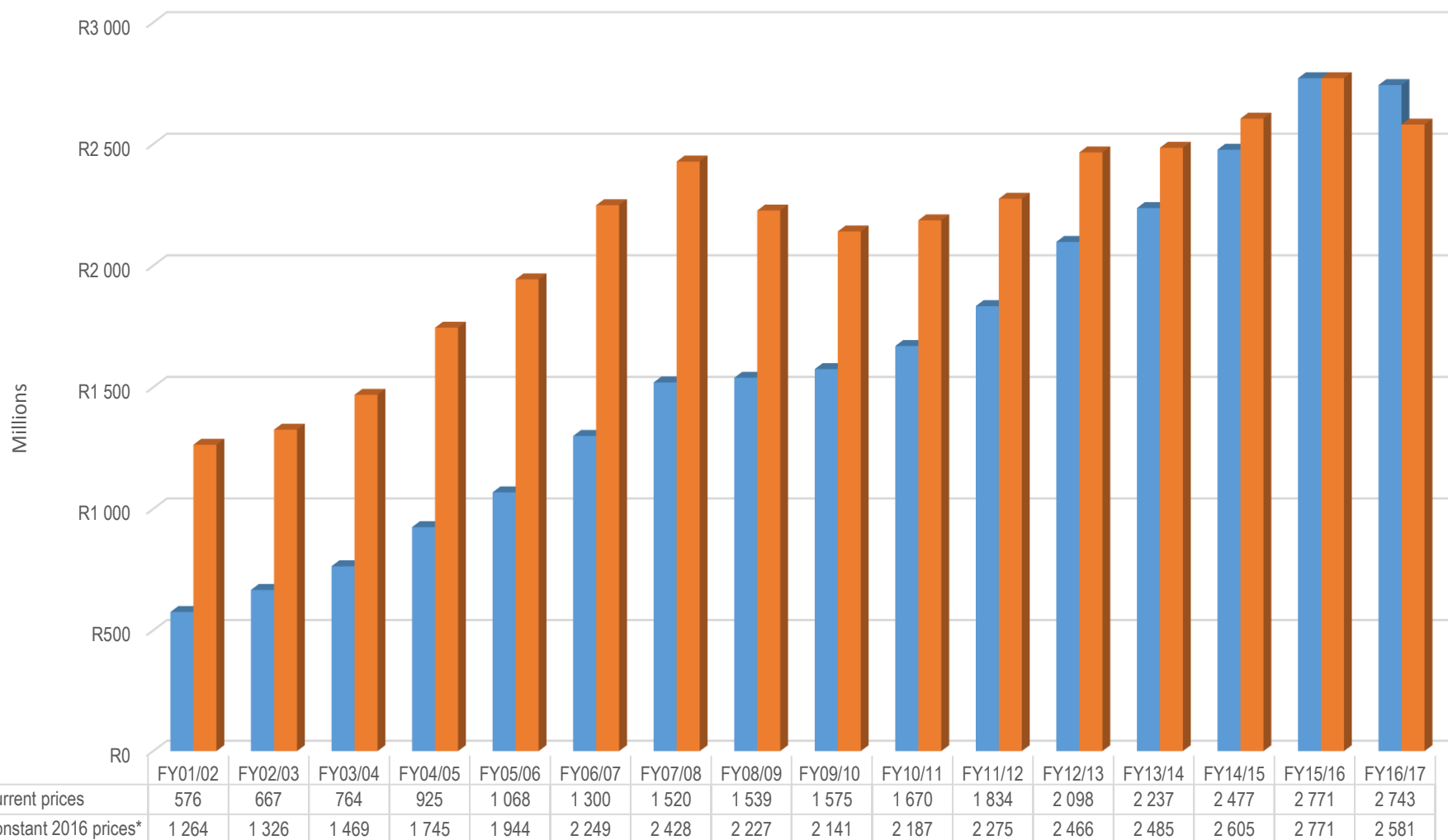


2016 constant prices, Reserve Bank

Trend in taxes/levies – FY2001/02 to FY2016/17

(all modes and provinces)

Gambling tax levied and collected by PLAs

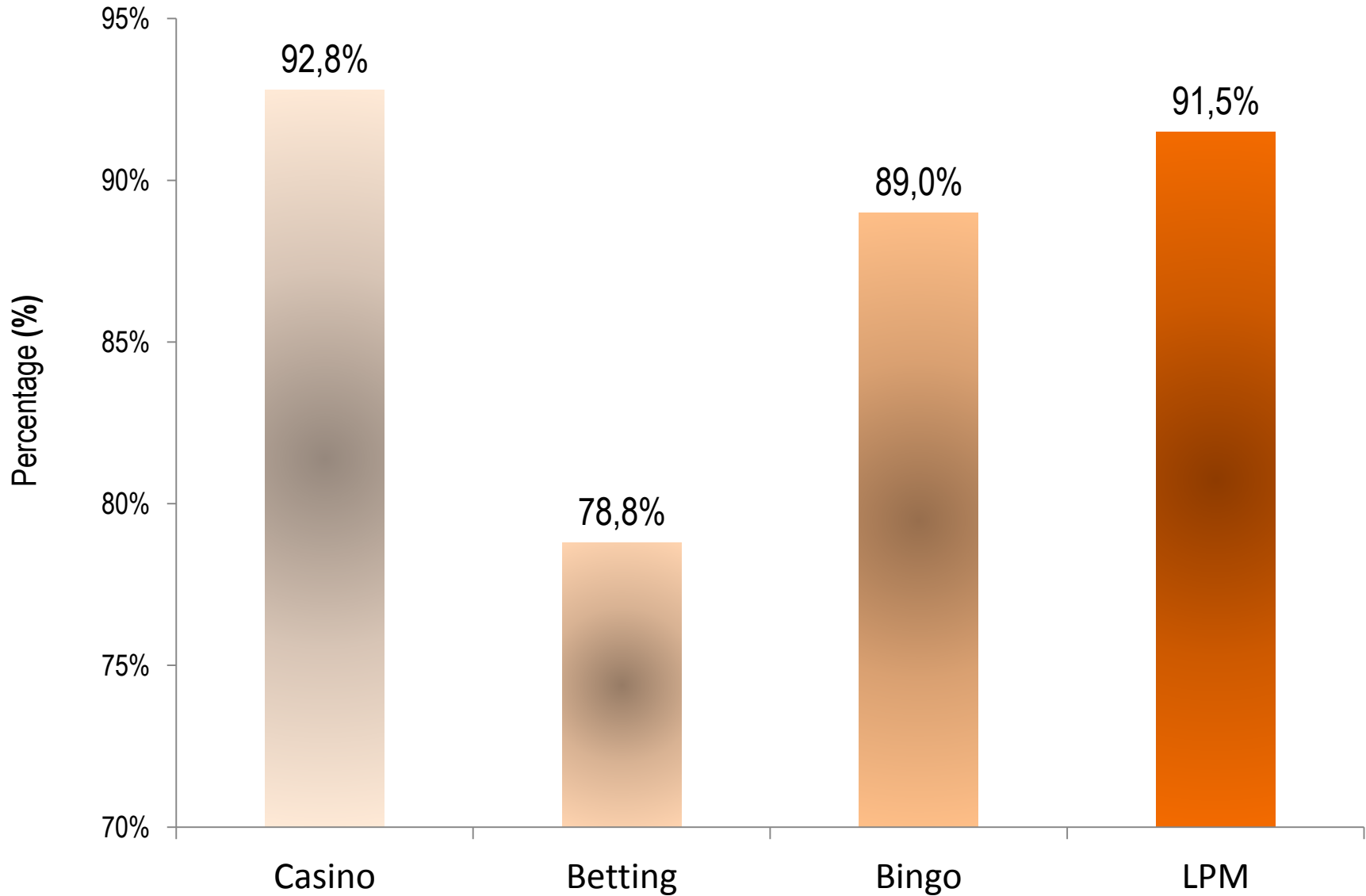


Summary : Taxes/Levies

- ❑ Taxes/levies increased by 6.6% from R2,1 billion in FY2013 to R2,2 billion in FY2014, by 10.7% to R2,5 billion in FY2015, by 11.9% to R2,8 billion in FY2016, and decreased by 1.0% to R2,7 billion in FY2017.
- ❑ A total amount of R 2 743 112 930 was collected during FY2017.
- ❑ During FY2017 at 66.5%, casinos contributed the highest amount of taxes/levies paid by comparison with other gambling modes.
- ❑ Although Gauteng collected the highest amount of taxes/levies relative to casinos (36.3%), betting on horse racing and sport (40.8%), and bingo (70.2%), the highest amount of taxes/levies was collected in Western Cape in the LPM sector (29.8%) during FY2017.

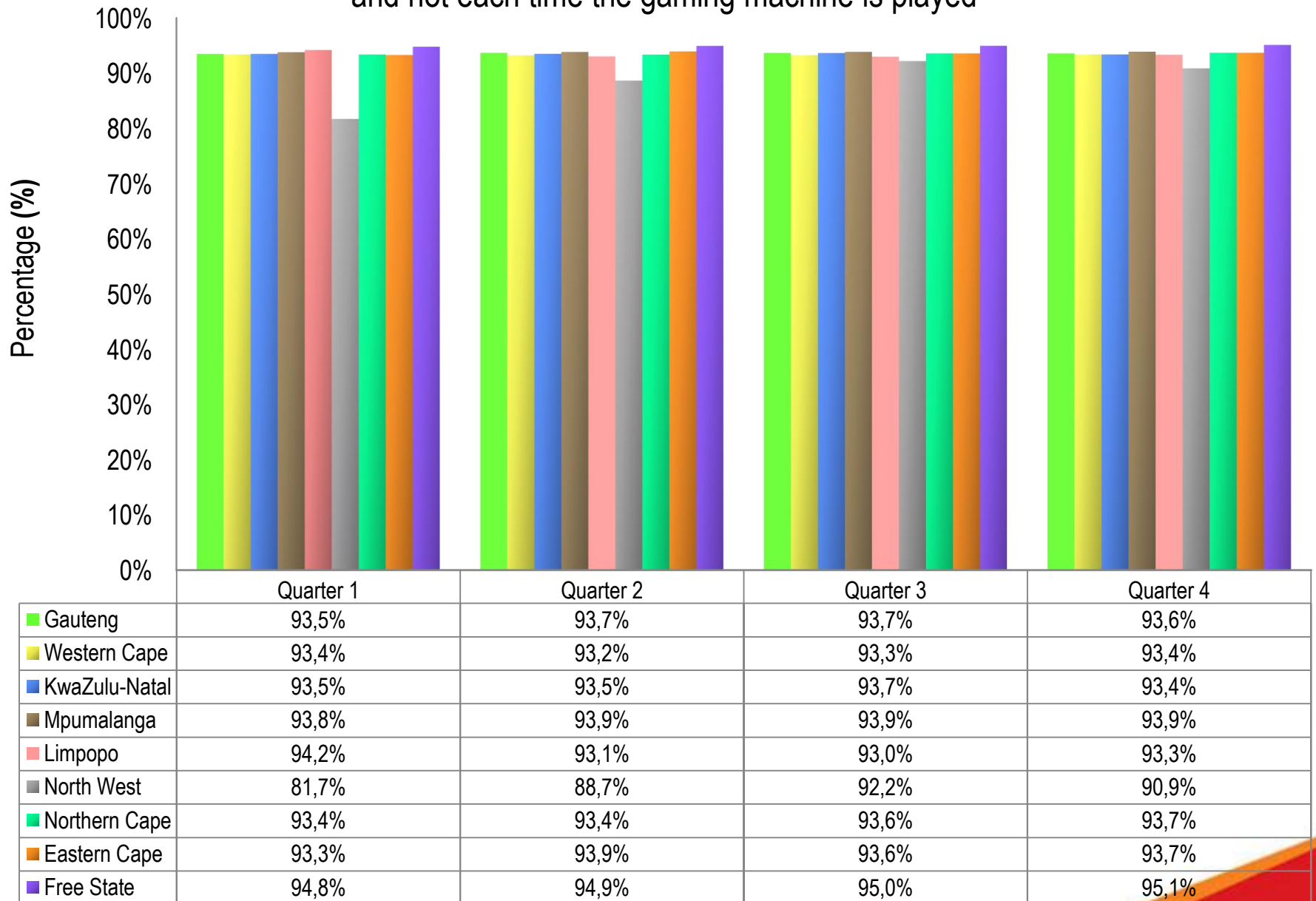
Average RTP % per gambling mode – FY2017

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



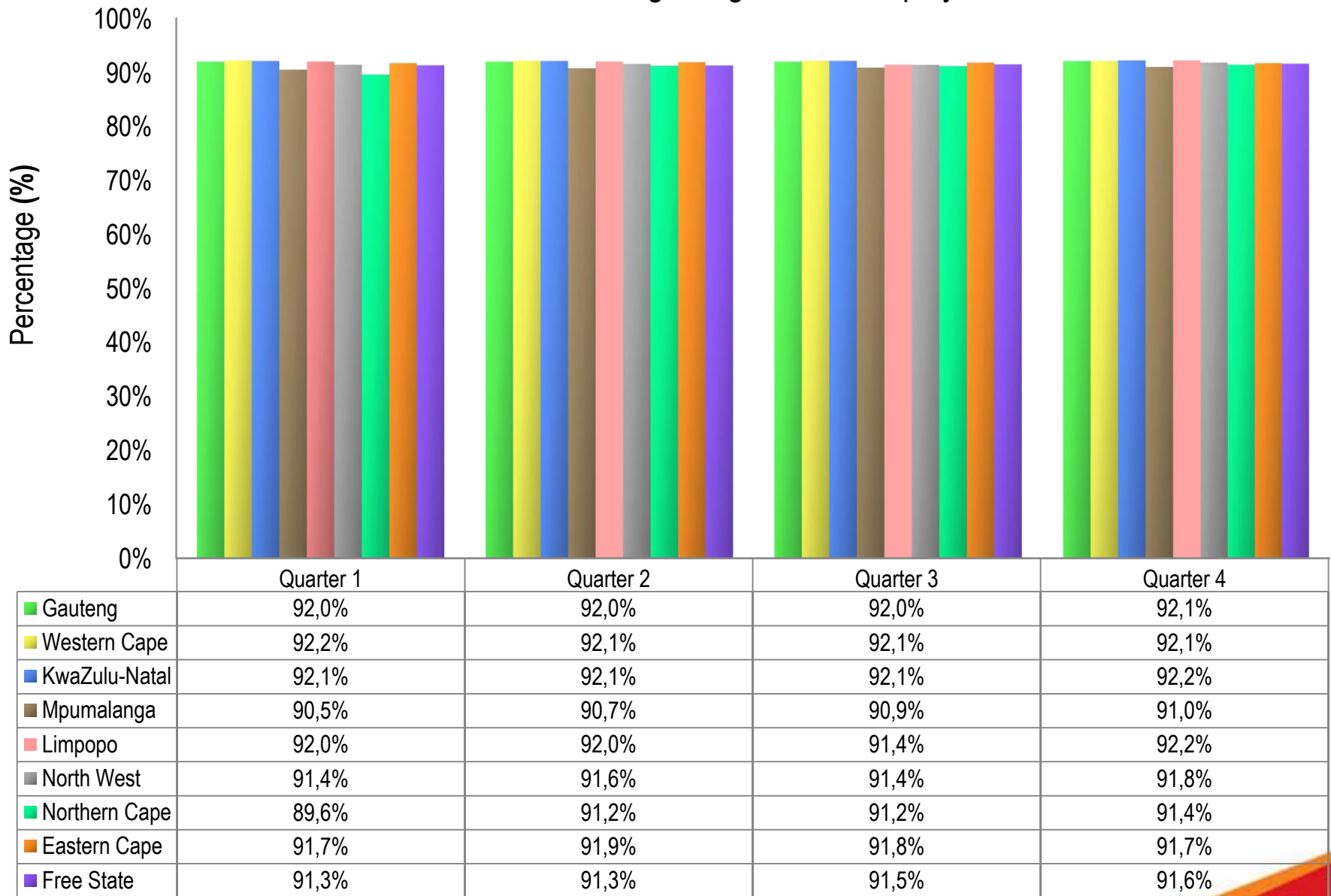
Quarterly casino RTP % - FY2017

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



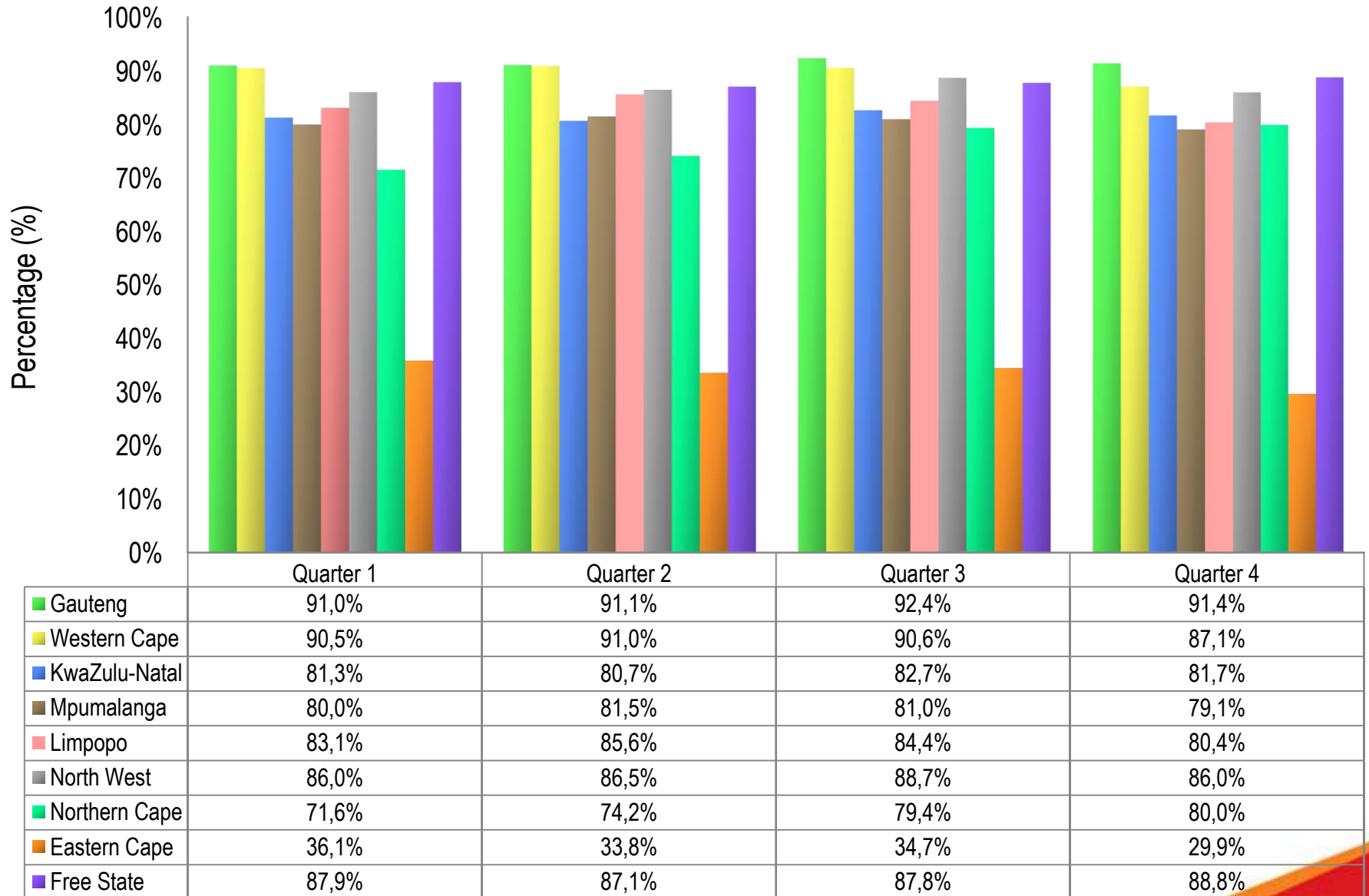
Quarterly LPM RTP % - FY2017

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



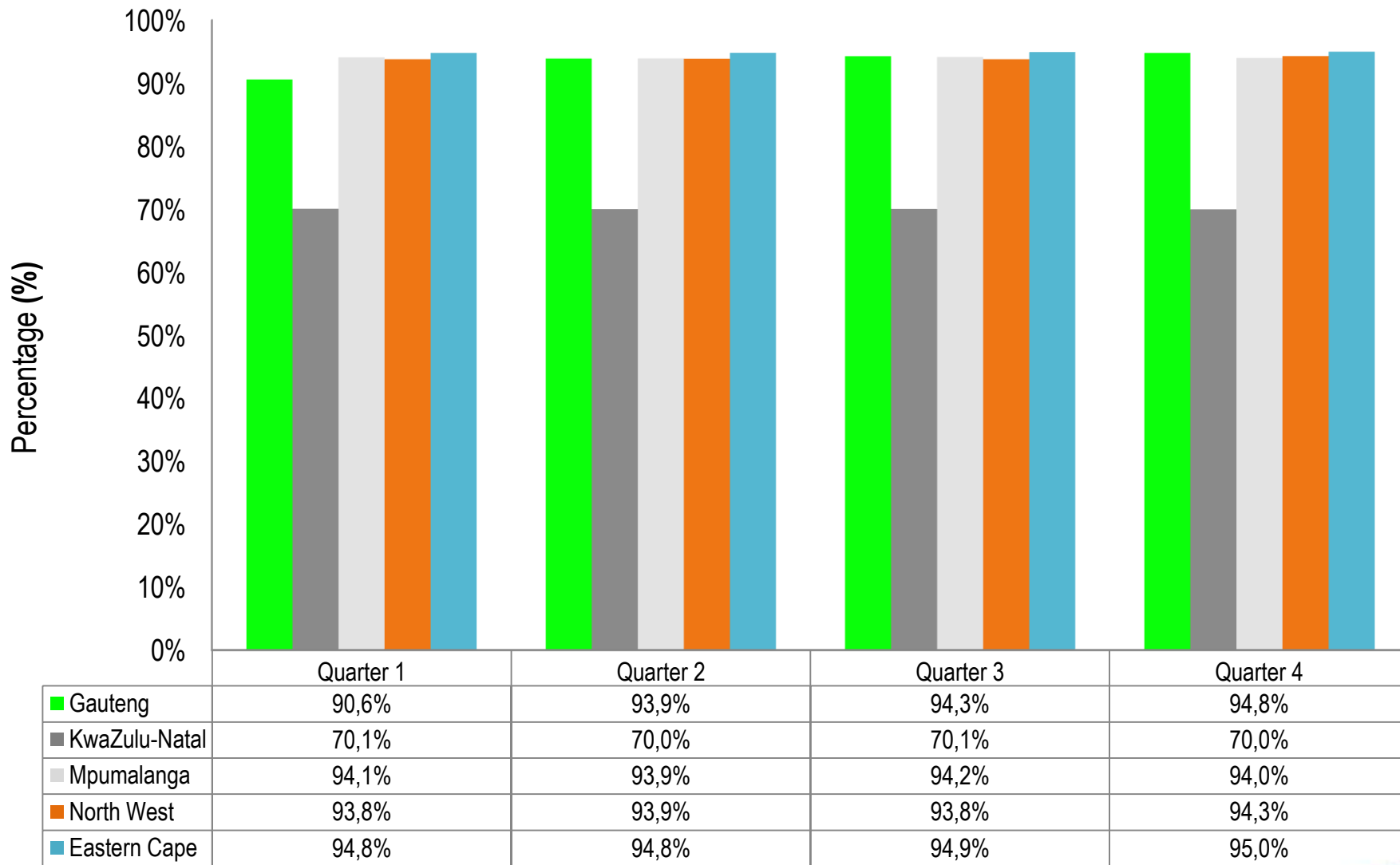
Quarterly betting RTP % - FY2017

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 % - FY2017*

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

- ❑ Overall, growth in terms of GGR declined over the past few years – only 3.8% growth was noted from FY2016 to FY2017, compared to 8.8% (from FY2015 and FY2016) and 9.6% (from FY2014 to FY2015).
- ❑ Less taxes/levies were collected during FY2017 compared to FY2016.
- ❑ No growth was recorded in the casino industry from FY2016 to FY2017.
- ❑ The highest growth in GGR between FY2016 to FY2017 (by 36.6%) was noted in the bingo industry, followed by 14.3% in the betting industry and 14.1% in the LPM industry during the same period.
- ❑ Growth is expected in the bingo, LPM and bookmakers offering betting on sport industries.

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