



National Gambling Board
South Africa
a member of the dti group

National Gambling Statistics

Casinos, Bingo, Limited Pay-out Machines and Fixed Odds and Totalisator Betting

2014/2015 Financial Year (FY15)

1 April 2014 – 31 March 2015

Quarter 1 = 1 April 2014 – 30 June 2014

Quarter 2 = 1 July 2014 – 30 September 2014

Quarter 3 = 1 October 2014 – 31 December 2014

Quarter 4 = 1 January 2015 – 31 March 2015

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 i.e (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) 2014/2015:
 - 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). FY15 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 2014 to 31 March 2015 (referred to as FY 2014/2015), whereas quarters are representative of the following specific periods:
 - Quarter 1: 1 April 2014 – 30 June 2014;
 - Quarter 2: 1 July 2014 – 30 September 2014;
 - Quarter 3: 1 October 2014 – 31 December 2014; and
 - Quarter 4: 1 January 2015 – 31 March 2015.
- ❑ 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 (1 April 2014 to 31 March 2015), 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 (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

The casino sector continues to dominate other gambling modes or sectors in terms of monies wagered, GGR generated and taxes/levies collected.

Limited growth in the casino industry is reflected. GGR generated in the casino industry increased by 0.6% from FY13 to FY14 and by 4.5% from FY14 to FY15.

GGR generated in the betting on horse racing and sport sector represents 14.5% of the total amount of GGR compared to the other legalised gambling sectors (casino, LPMs and bingo sectors). Noticeable increases in GGR generated have been recorded i.e. an increase of 9.1% from FY13 to FY14, and 22.2% from FY14 to FY15. This is mainly as a result of major increases in the generation of GGR by bookmakers offering betting on sport. The biggest increase in the collection of taxes from FY14 to FY15 (by 59.6%) was from bookmakers offering betting on sport. However, in monetary value, the highest amounts of taxes/levies were collected from bookmakers offering betting on horse racing.

GGR generated in the LPM sector represents 8.7% 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 17.8% from FY13 to FY14, and by 19.6% from FY14 to FY15.

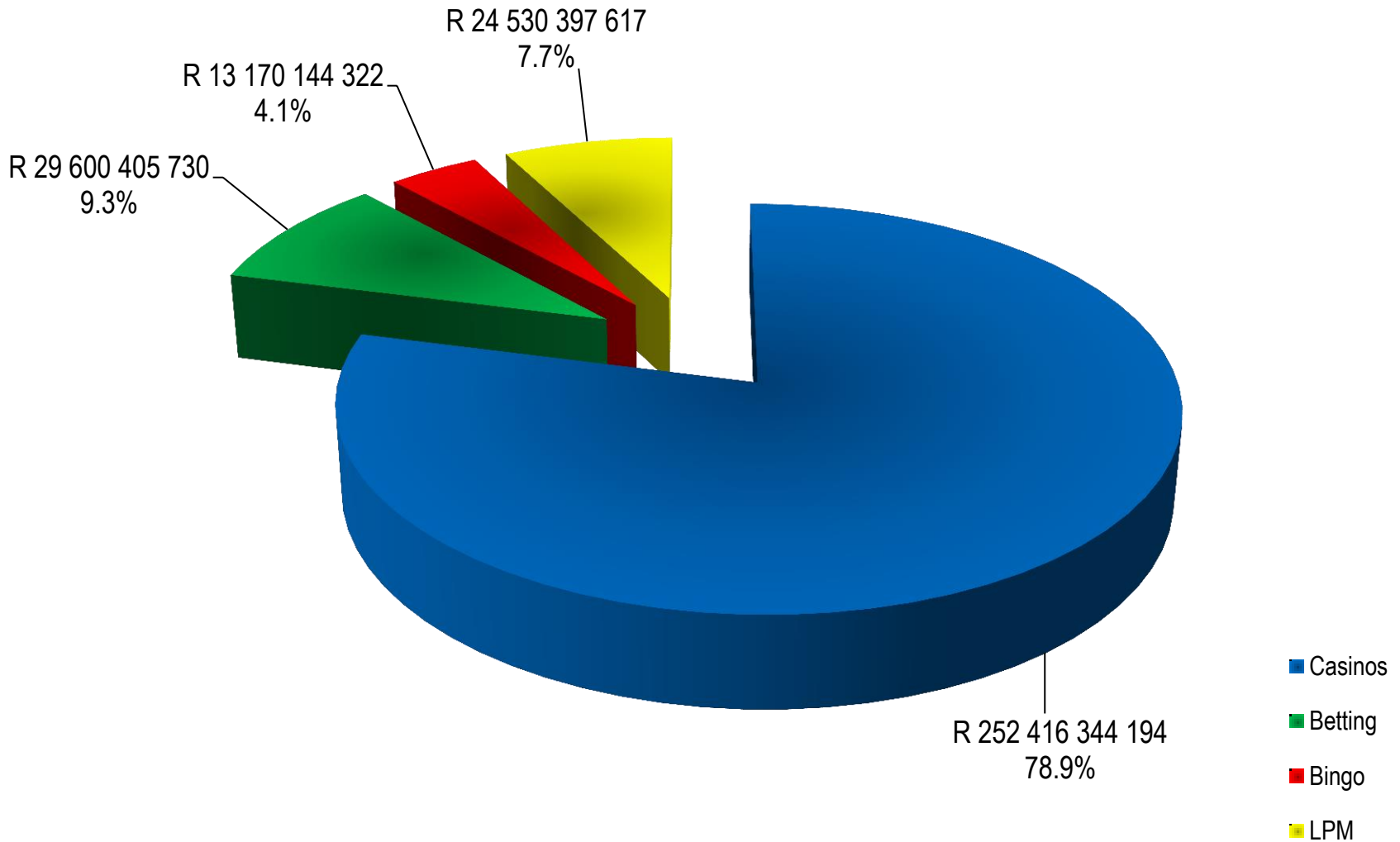
EXECUTIVE SUMMARY (continued)

Overall, GGR increased by 13.6% from R18,4 billion in FY12 to R20,9 billion in FY13, by 4.3% to R 21,8 billion in FY14, and by 9.6% to R 23,9 billion in FY15. During FY15, as at 31 March 2015, casinos accounted for the highest GGR generated, being 72.1% as compared to other gambling modes. Compared to all other provinces, Gauteng at a 42.4% share, accounted for the highest amount of GGR generated.

In general, the collection of taxes/levies increased by 14.4% from R1,8 billion in FY12, to R2,1 billion in FY13, by 6.6% to R2,2 billion in FY14, and by 10.7% to R2,5 billion in FY15. A total amount of R 2 476 683 639 in taxes/levies was collected during FY15. During FY15, at 72.3%, casinos contributed the highest amount of taxes/levies paid by comparison with other gambling modes. At 37.9% Gauteng accounts for the highest amount of taxes/levies paid compared to all other provinces.

Turnover per gambling mode – FY2015, Qrt 1, 2, 3 & 4

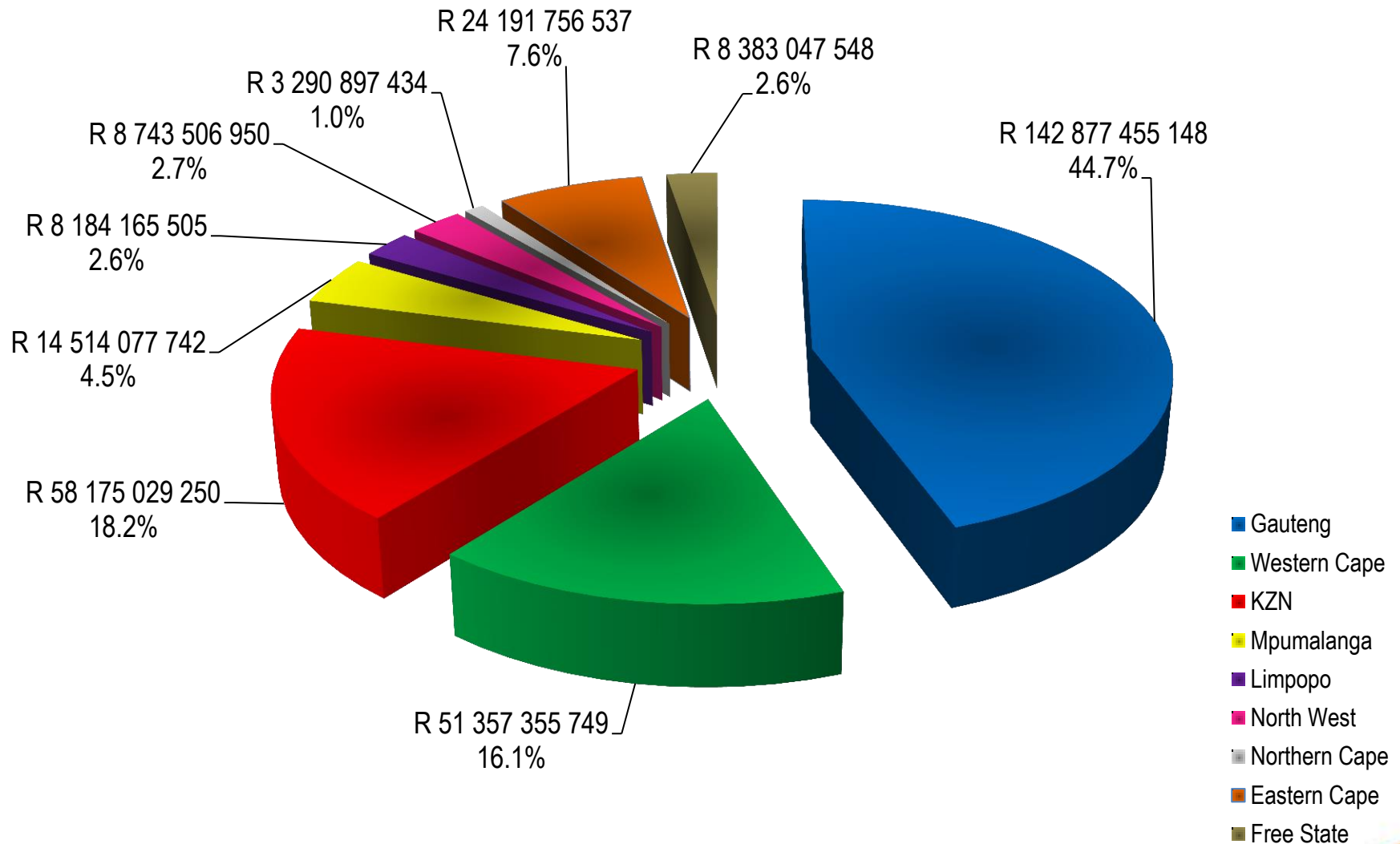
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion.



Total turnover: R 319 717 291 862

Turnover per province – FY2015, Qrt 1, 2, 3 & 4

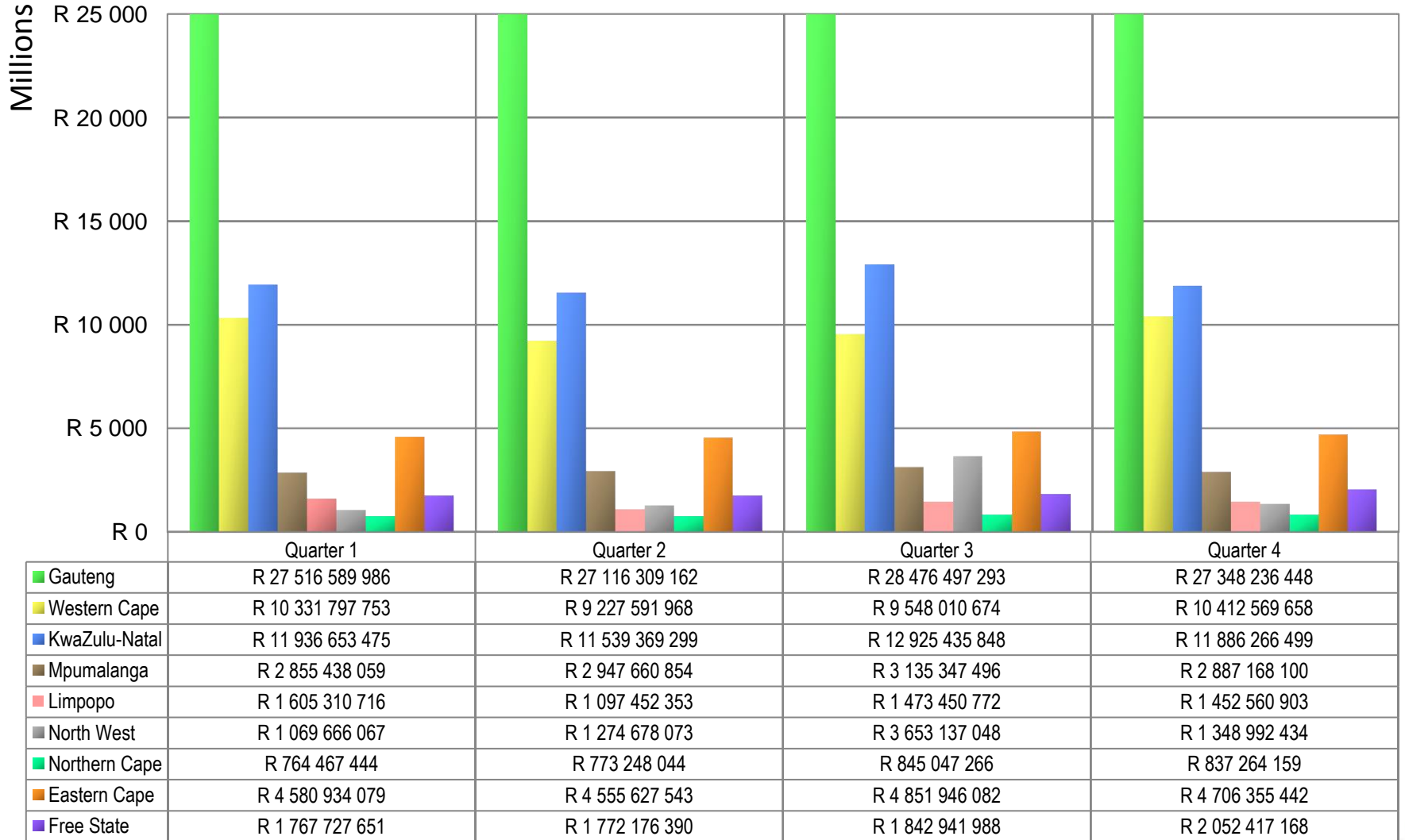
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion.



Total turnover: R 319 717 291 862

Quarterly casino turnover - FY2015, Qrt 1, 2, 3 & 4

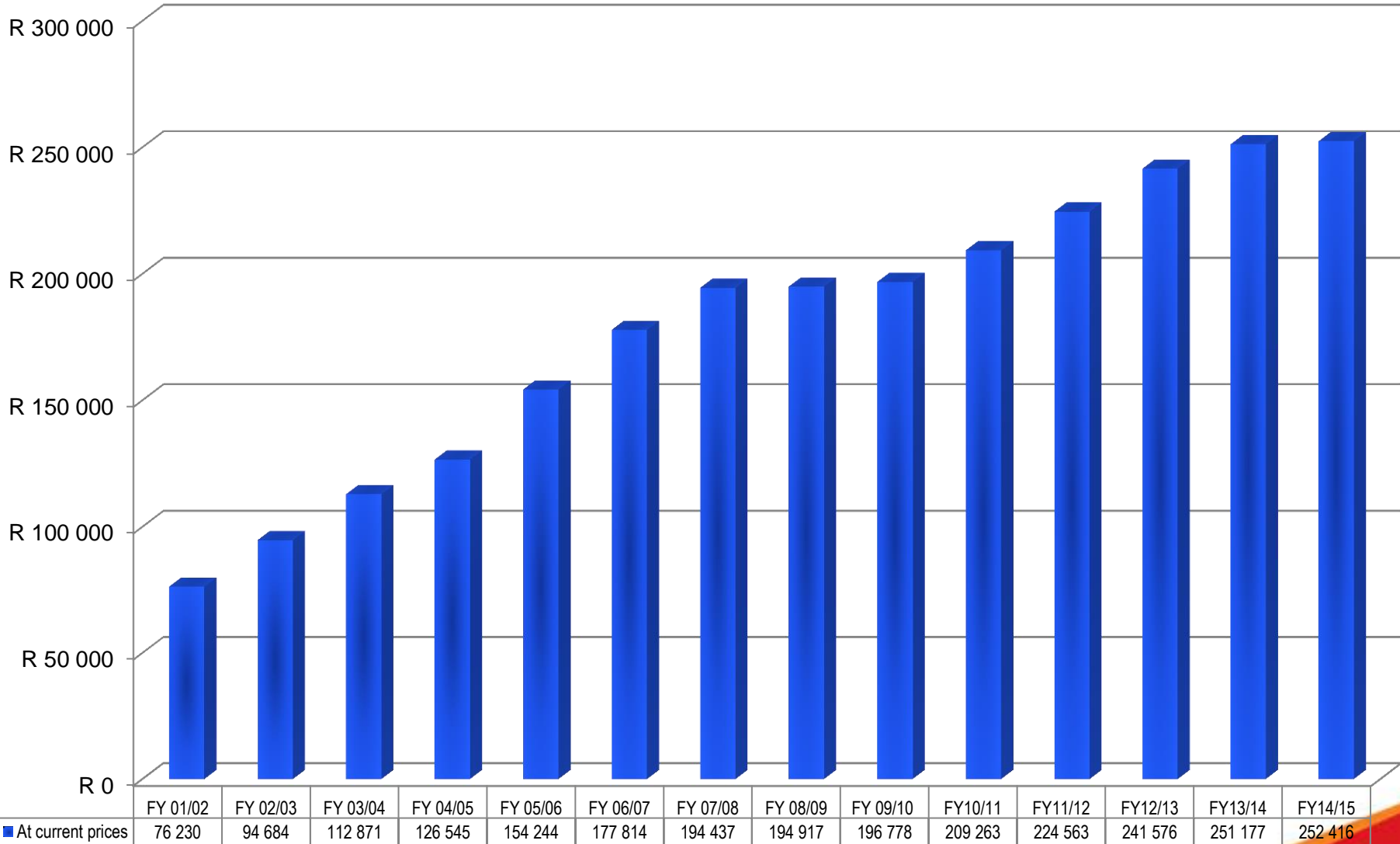
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



Trend in turnover casinos – FY01/02 to FY15

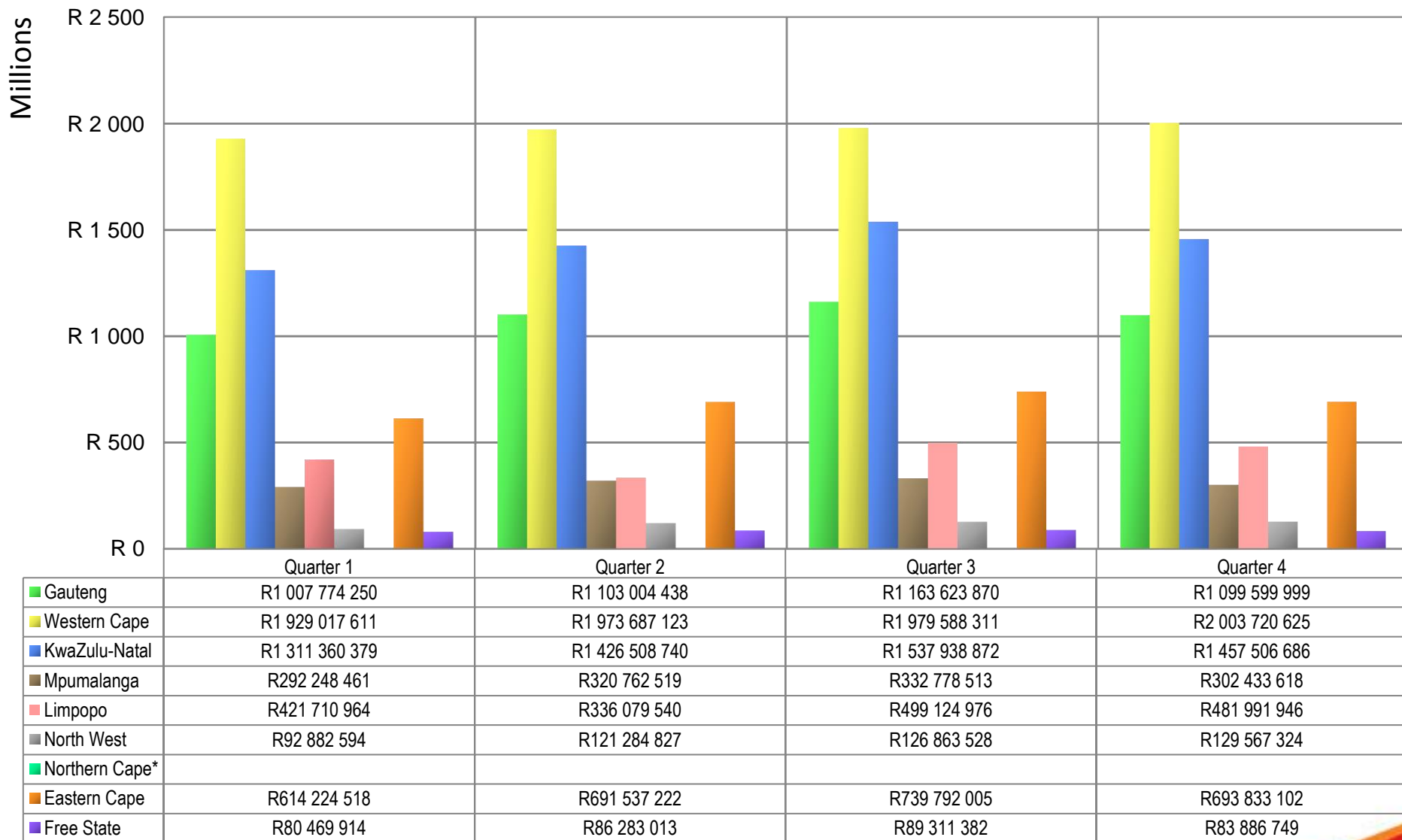
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion

Millions



Quarterly LPM turnover - FY2015, Qrt 1, 2, 3 & 4*

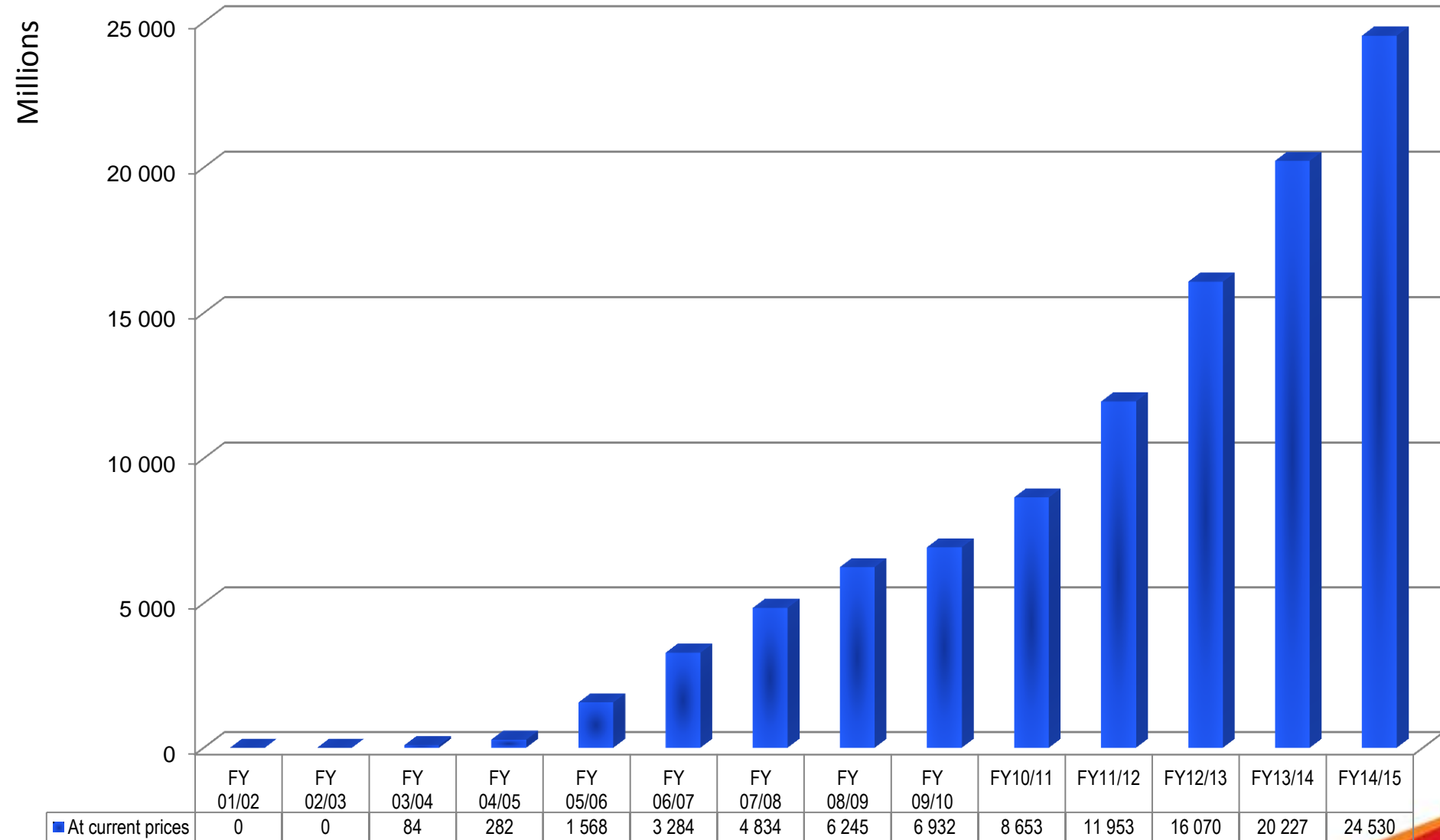
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



* LPMs not yet rolled out in Northern Cape

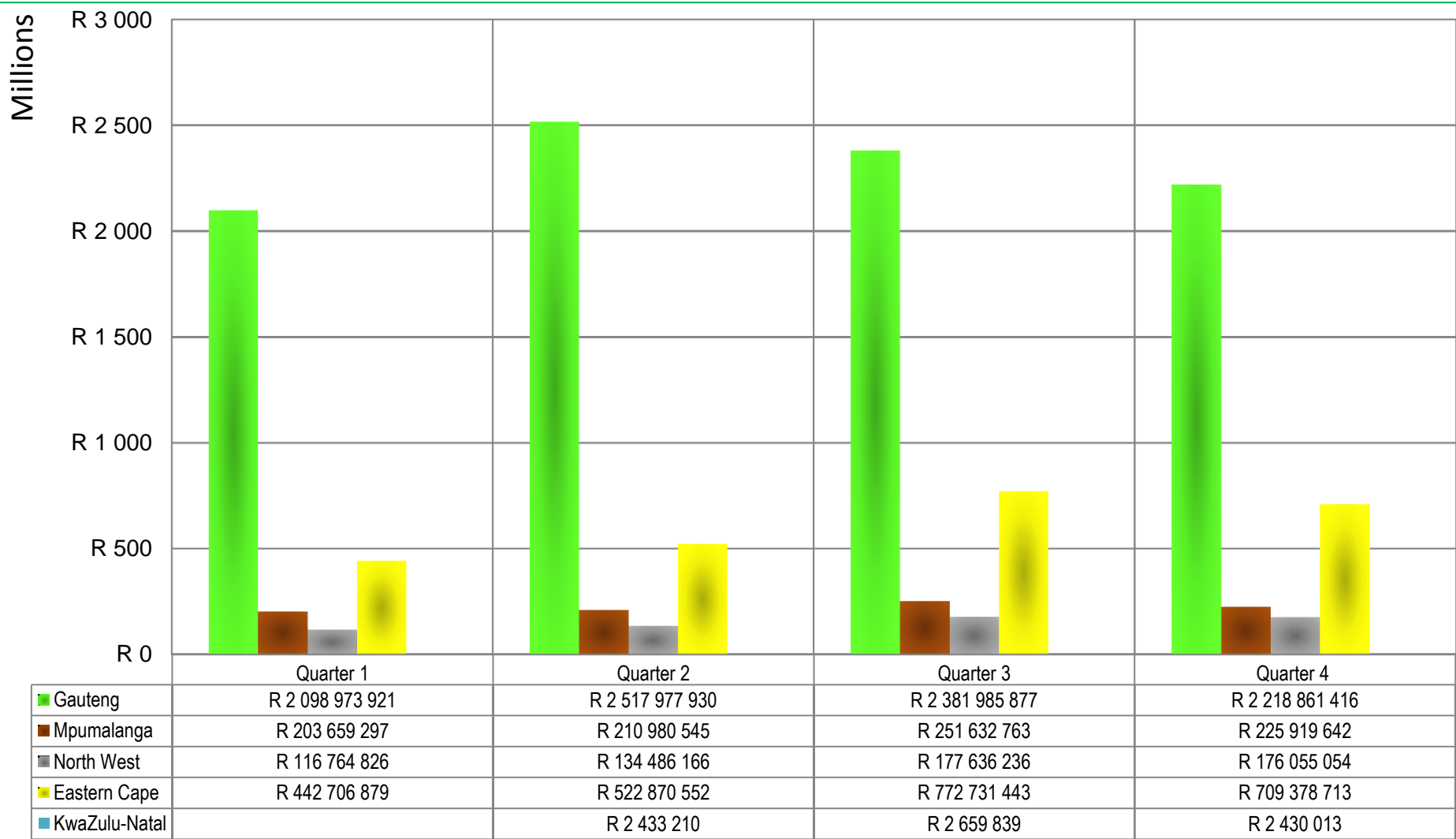
Trend in turnover LPMs – FY01/02 to FY15

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



Quarterly bingo turnover - FY2015, Qrt 1, 2, 3 & 4*

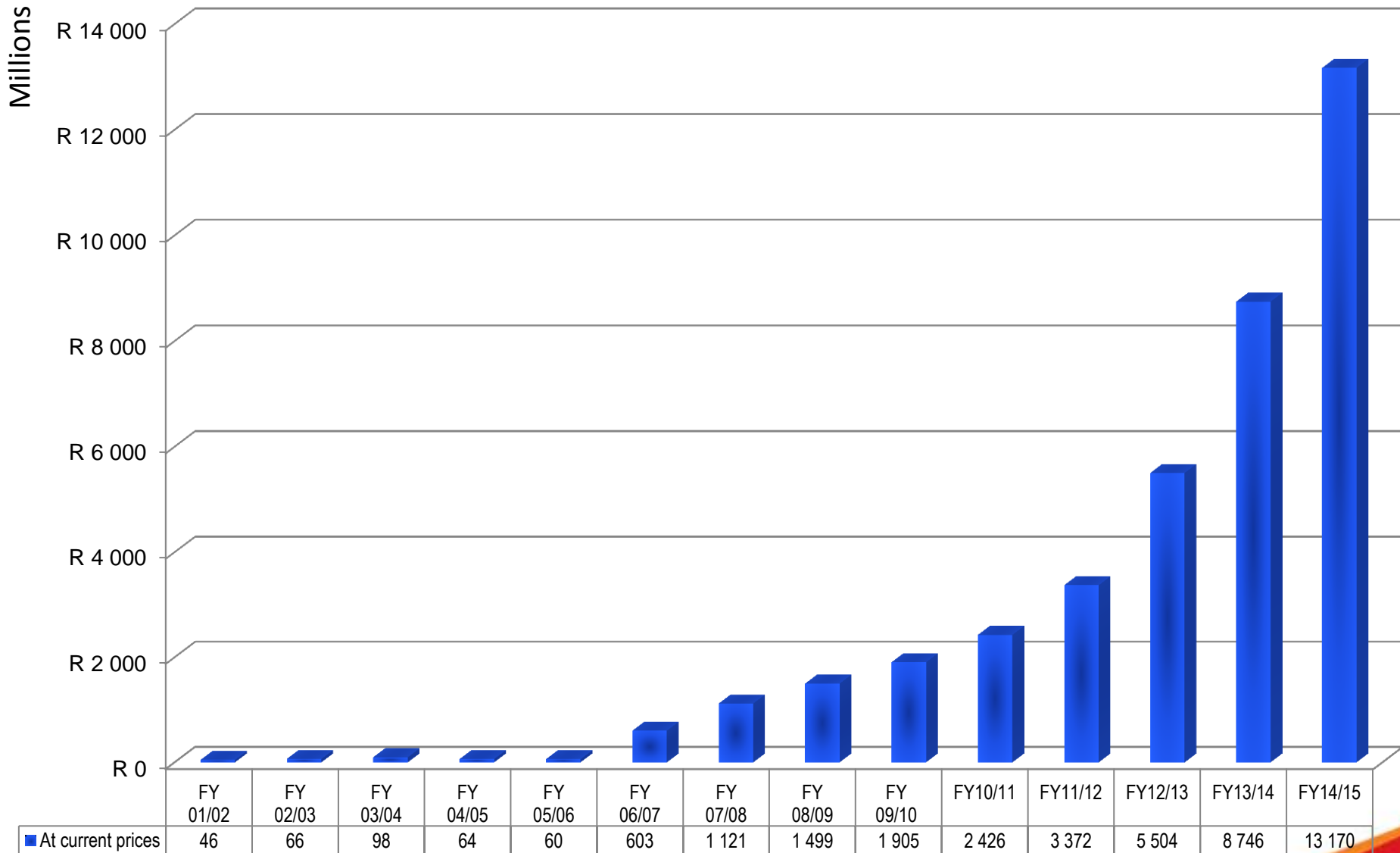
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



- 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 – FY01/02 to FY15

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

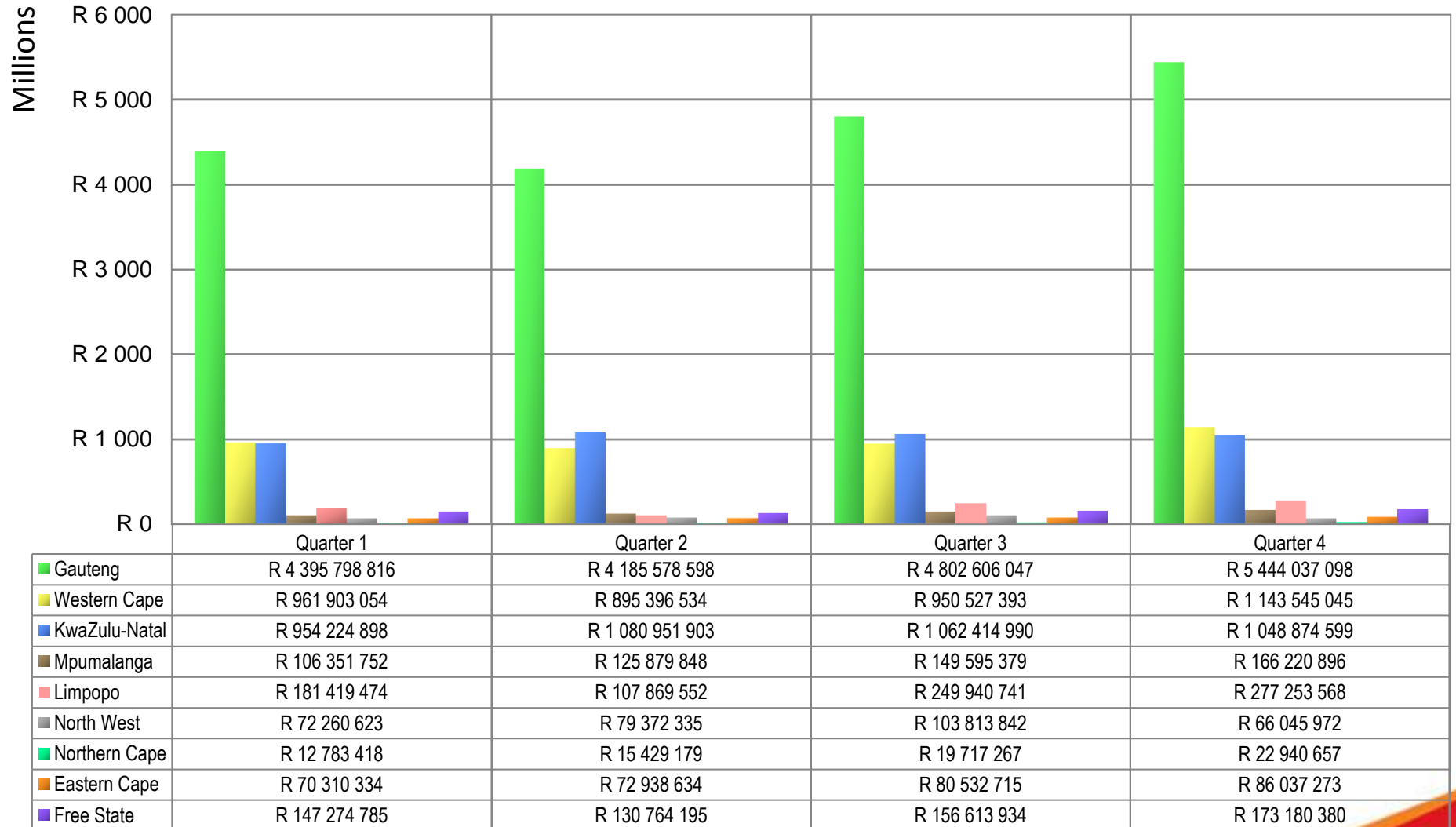


* Bingo statistics represents bingo offered for play in Gauteng, Mpumalanga, North West, KwaZulu-Natal and Eastern Cape only

Quarterly betting turnover – FY2015, 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

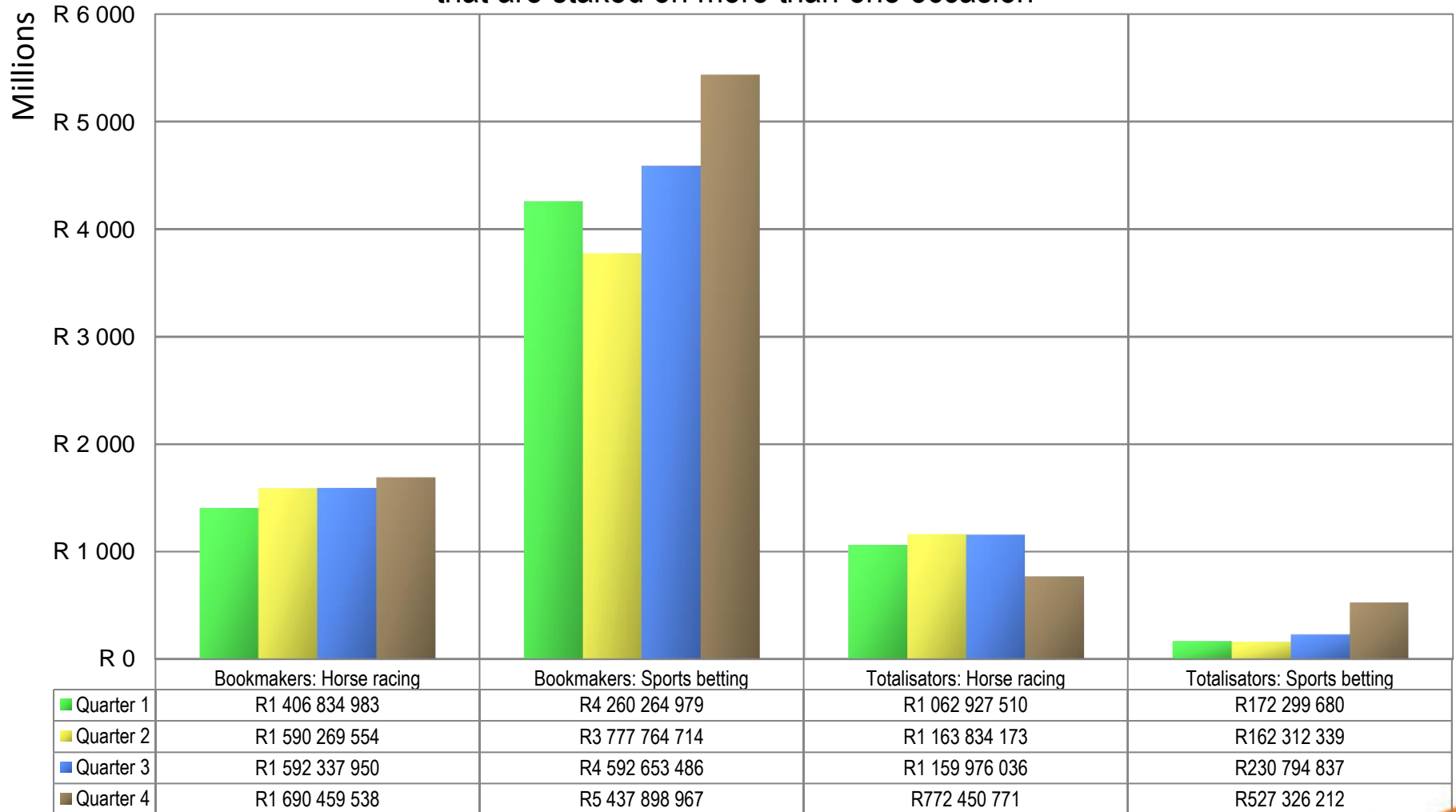


Quarterly betting turnover – FY2015, Qrt 1, 2, 3 & 4

Split between Bookmakers & Totalisators

Horse racing & Sports betting

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

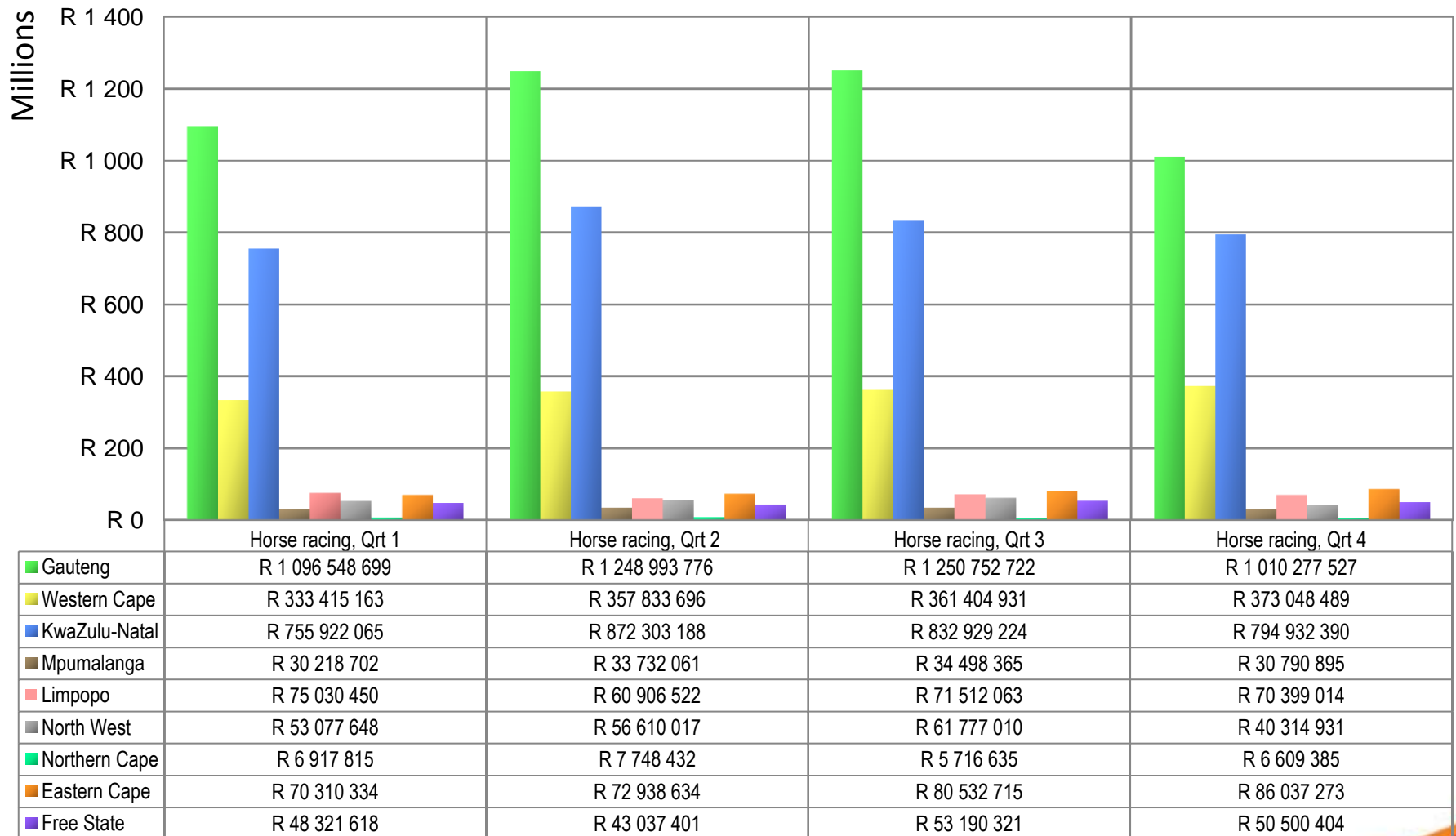


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting turnover – FY2015, Qrt 1, 2, 3 & 4

Horse racing*

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

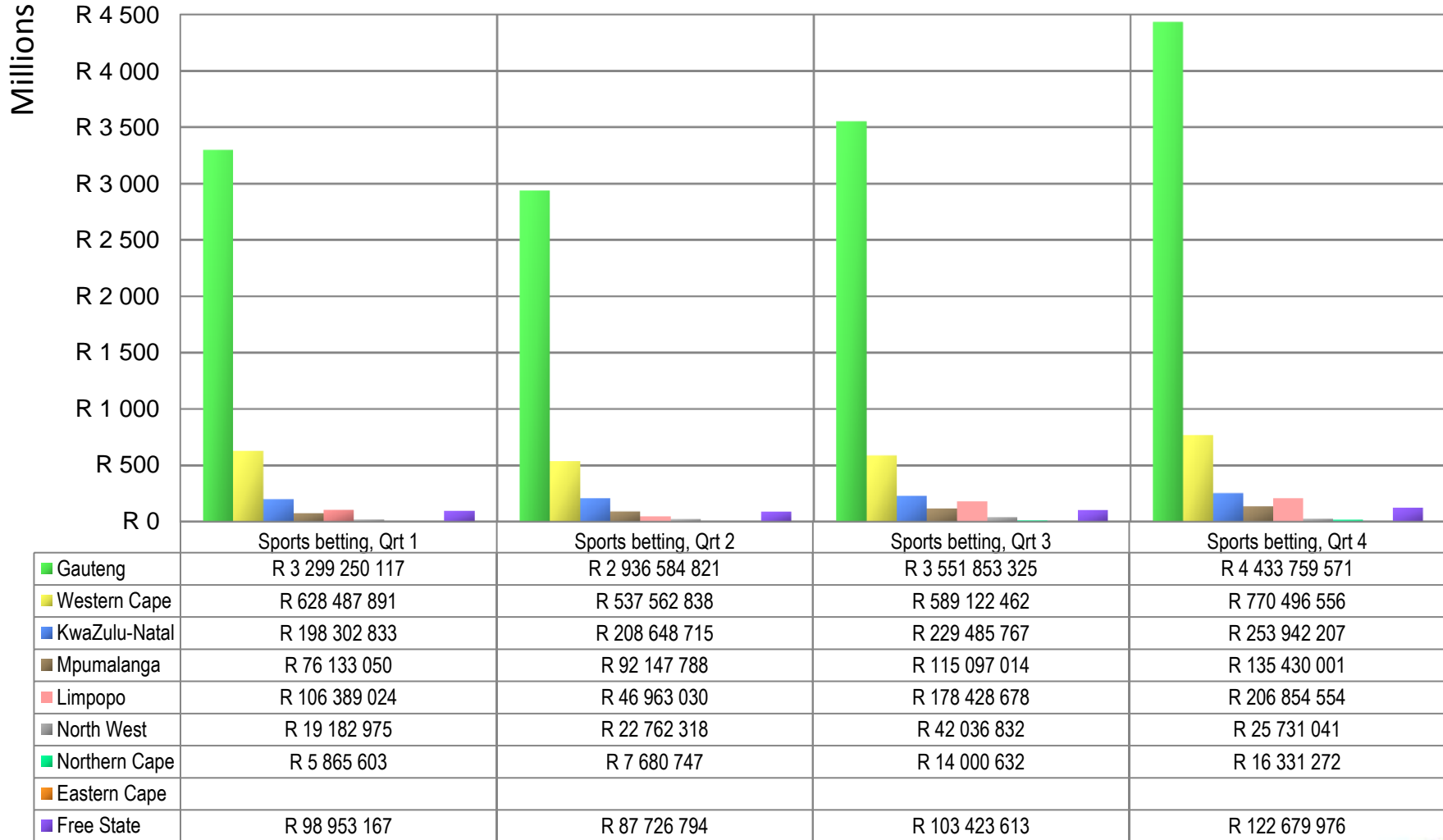


* Eastern Cape: Statistics includes sports betting

Quarterly betting turnover – FY2015, Qrt 1, 2, 3 & 4

Sports betting*

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

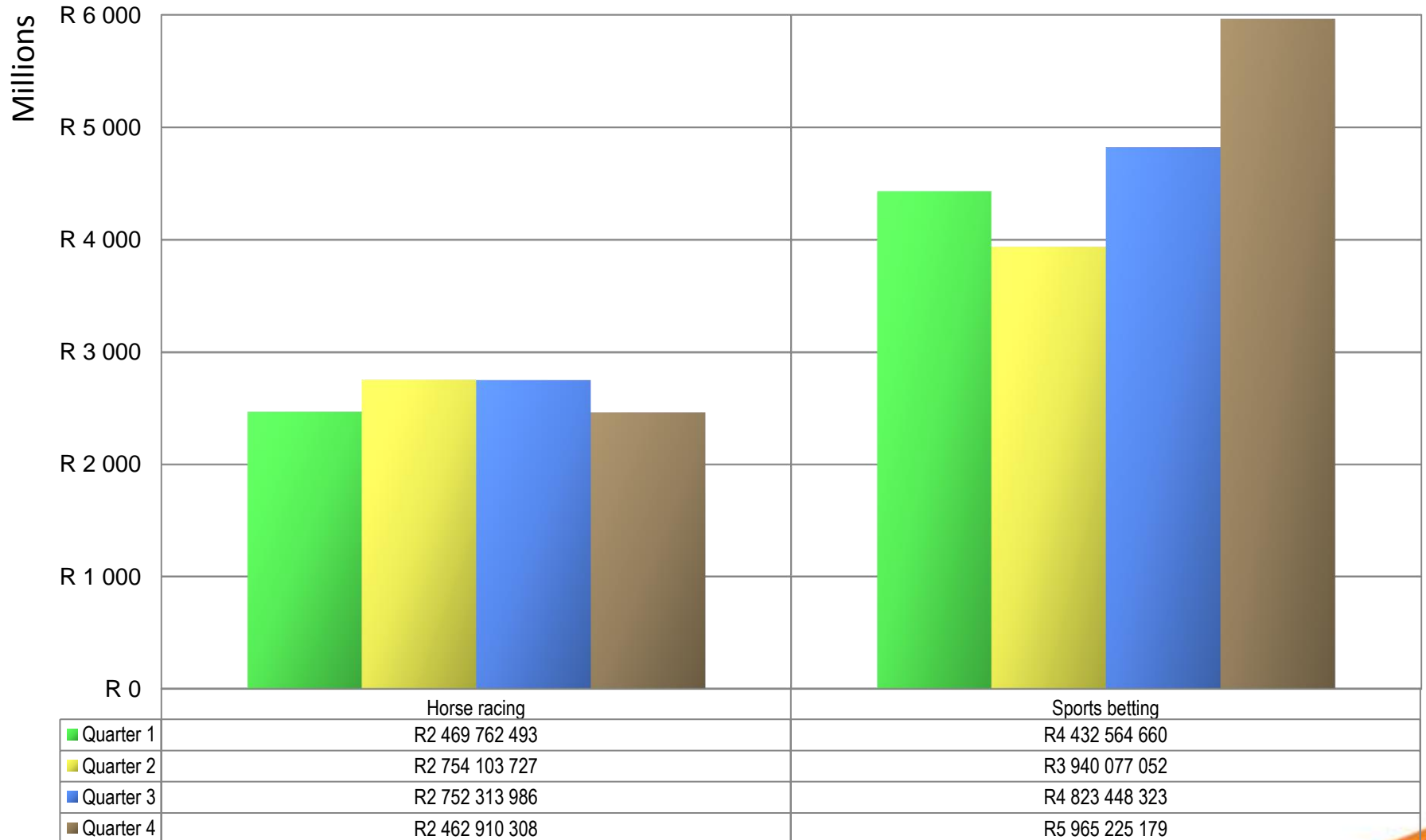


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting turnover – FY2015, Qrt 1, 2, 3 &4

Split between Horse racing & Sports betting

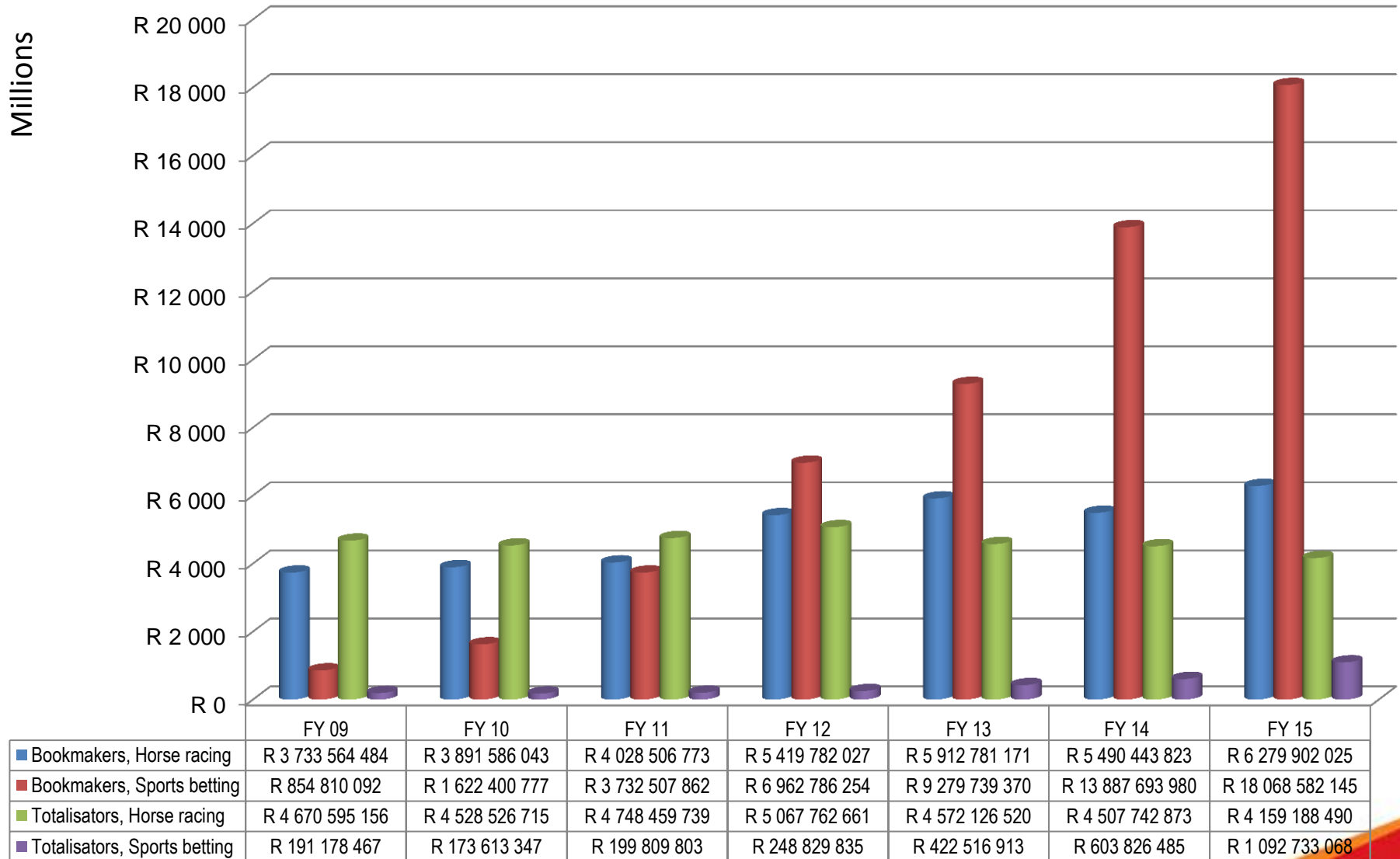
The rand value of money wagered includes "recycling" which refers to amounts that are staked on more than one occasion



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

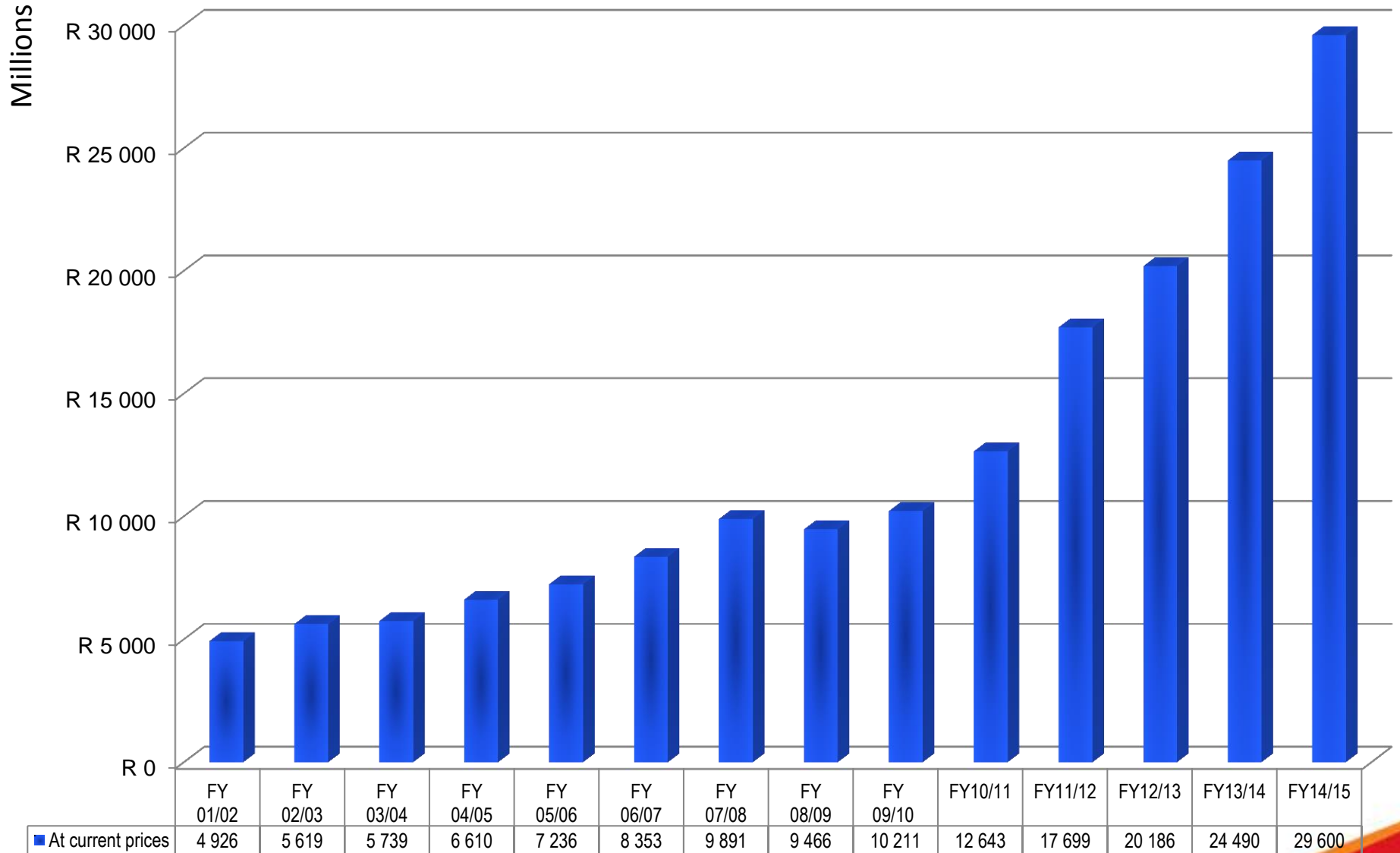
Trend in turnover, bookmakers & totalisators, FY09 to FY15

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



Trend in turnover, betting – FY01/02 to FY14/15

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

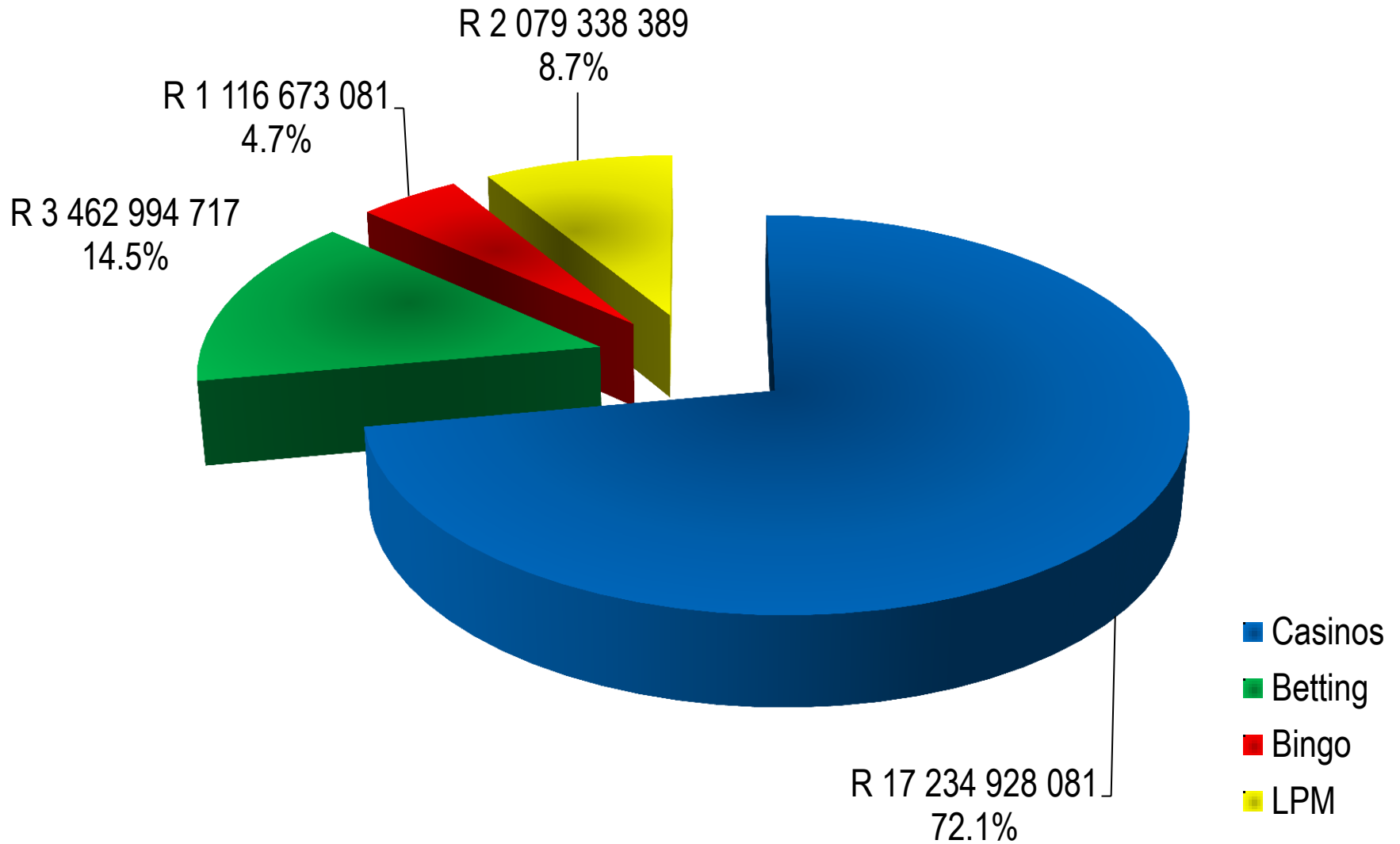


Summary : Turnover

- ❑ Casinos accounted for the highest TO at 78.9% by comparison with all other gambling modes.
- ❑ A total amount of R 319 717 291 862 was wagered in FY15.
- ❑ Gauteng accounted for the highest amount of TO in respect of all gambling modes, the total percentage being 44.7% as compared to other provinces.
- ❑ Although Gauteng represented the highest amount of turnover relative to casinos (43.8%), betting on horse racing and sport (63.6%), and bingo (70.0%), the highest amount of money in the LPM sector was wagered in Western Cape (32.1%).

GGR per gambling mode – FY2015, Qrt 1, 2, 3 & 4

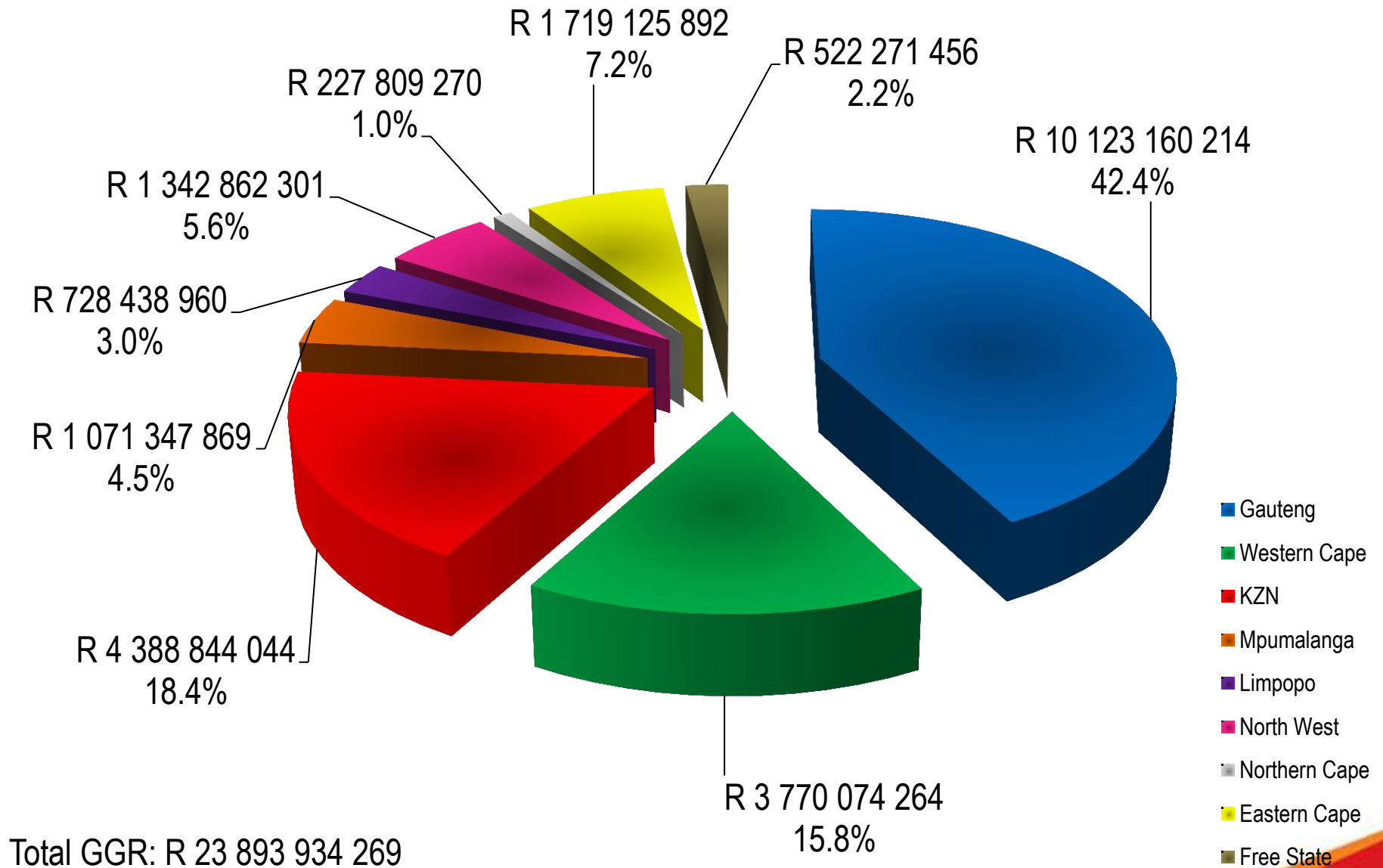
Rand value of the gross revenue of an operator



Total GGR: R 23 893 934 269

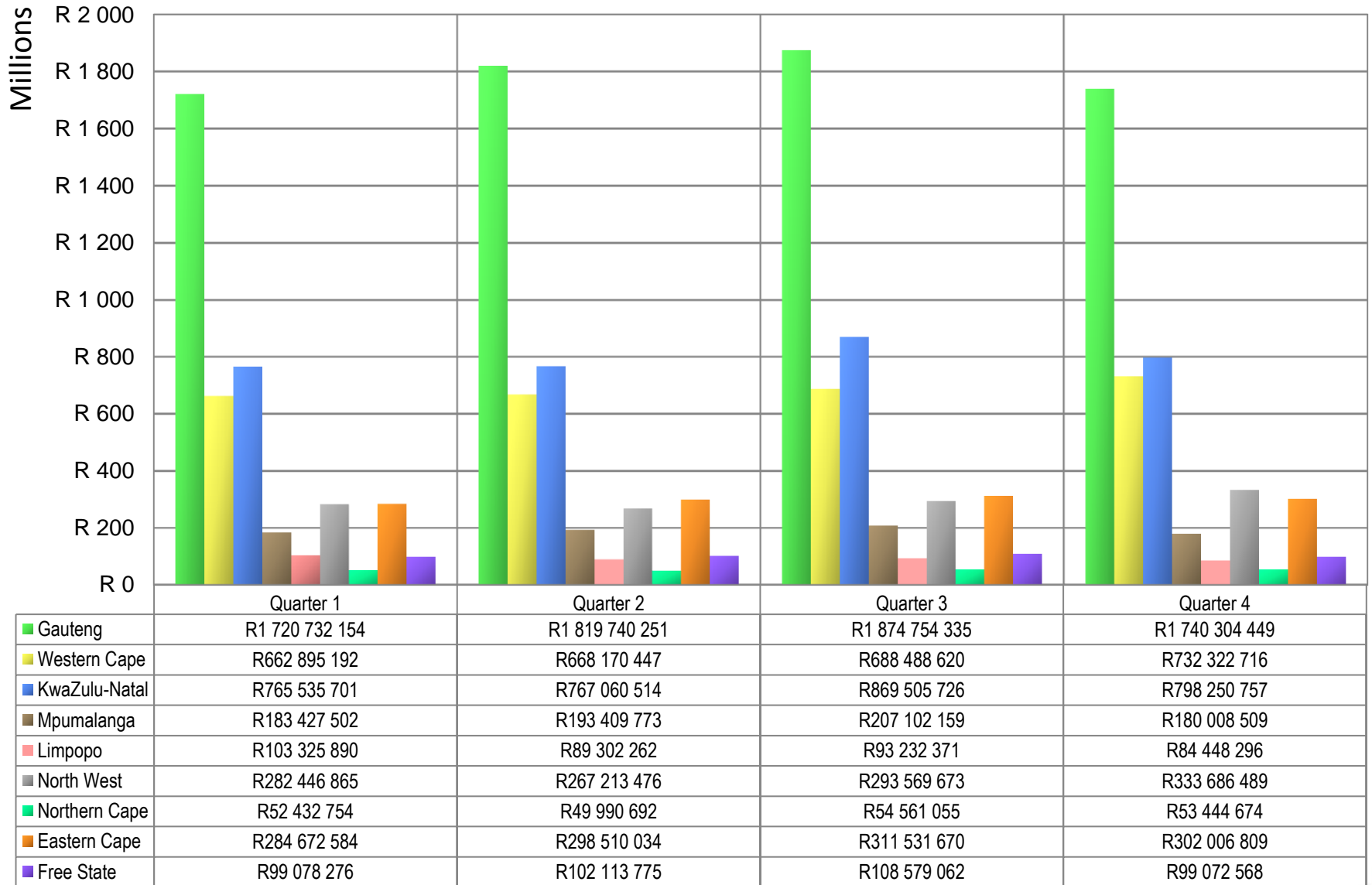
GGR per province - FY2015, Qrt 1, 2, 3 & 4

Rand value of the gross revenue of an operator



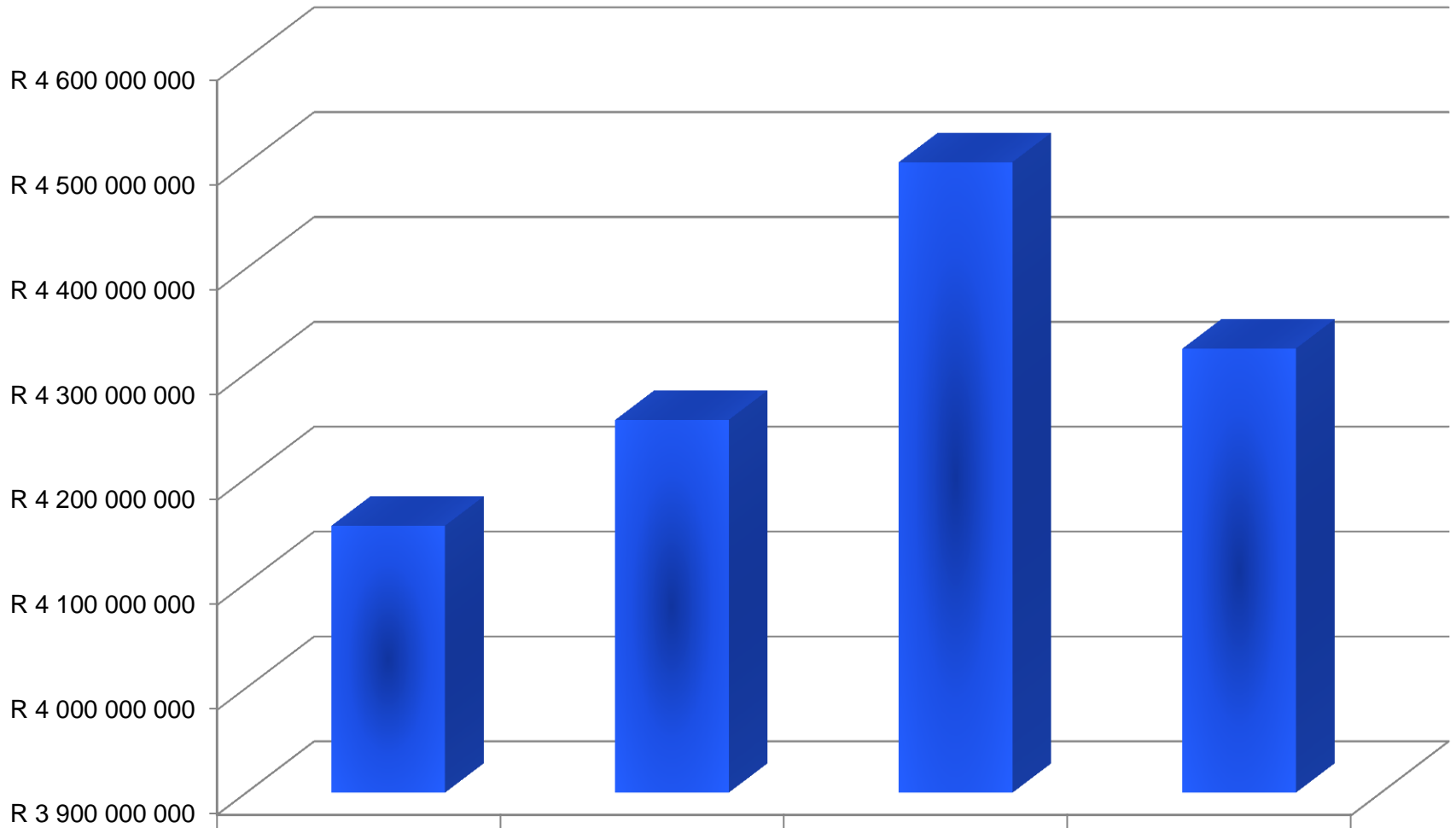
Quarterly casino GGR - FY2015, Qrt 1, 2, 3 & 4

Rand value of the gross revenue of an operator



Trend in GGR casinos – FY15, Qrt 1, 2, 3 & 4

Rand value of the gross revenue of an operator



■ Total GGR, casinos, all provinces

FY15, 1st Quarter

R 4 154 546 918

FY15, 2nd Quarter

R 4 255 511 223

FY15, 3rd Quarter

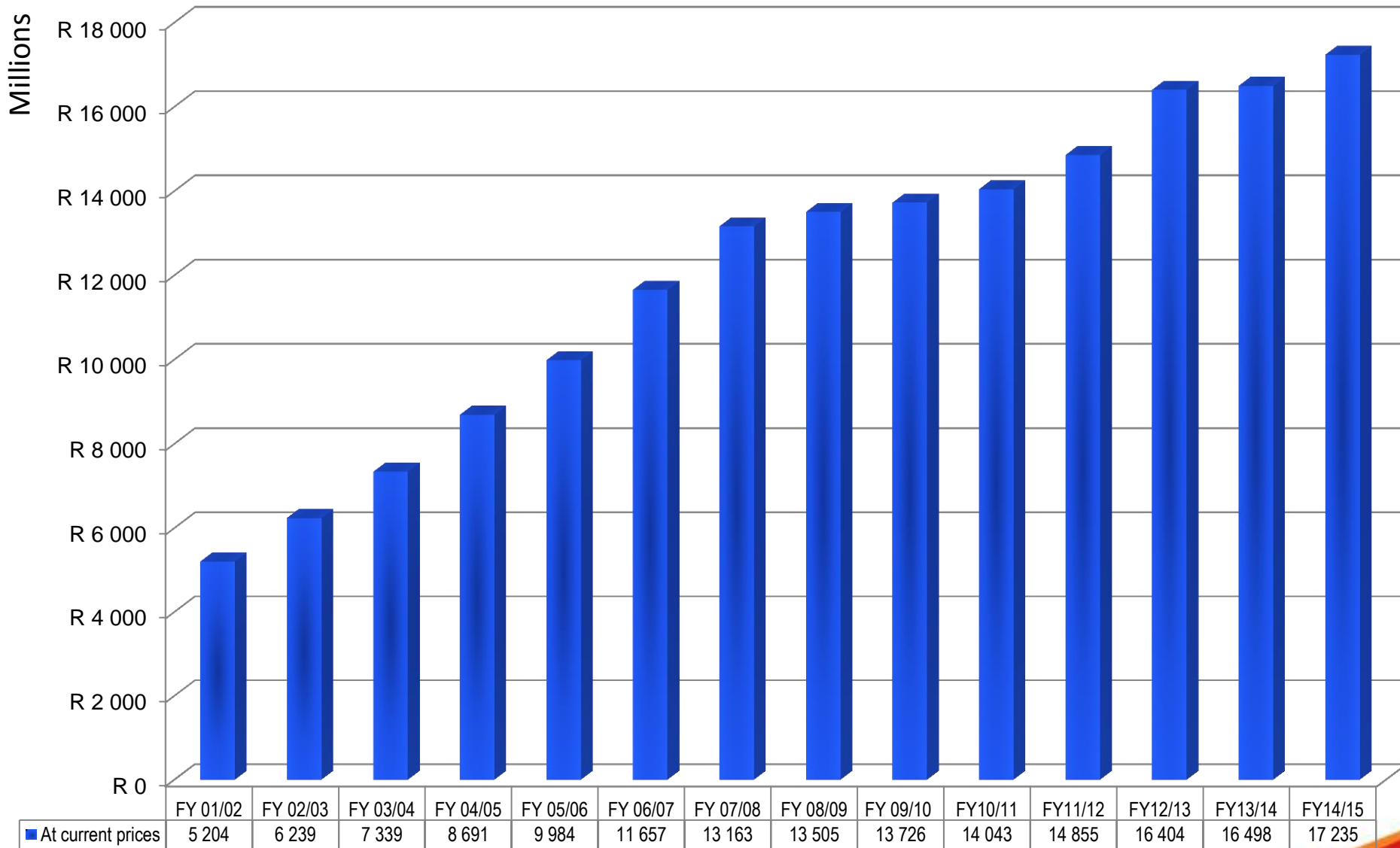
R 4 501 324 673

FY15, 4th Quarter

R 4 323 545 268

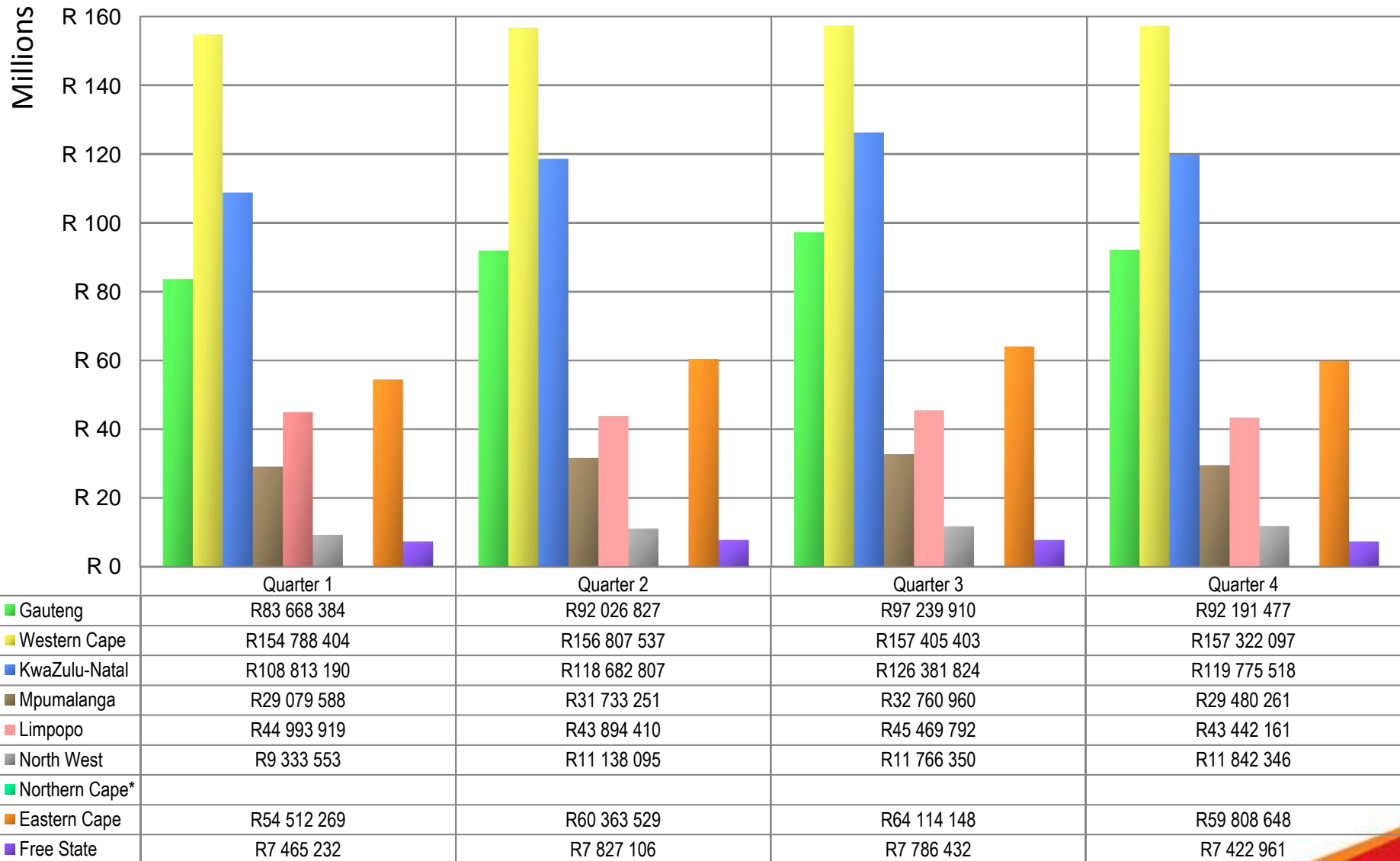
Trend in GGR casinos – FY01/02 to FY15

Rand value of the gross revenue of an operator



Quarterly LPM GGR - FY2015, Qrt 1, 2, 3 & 4*

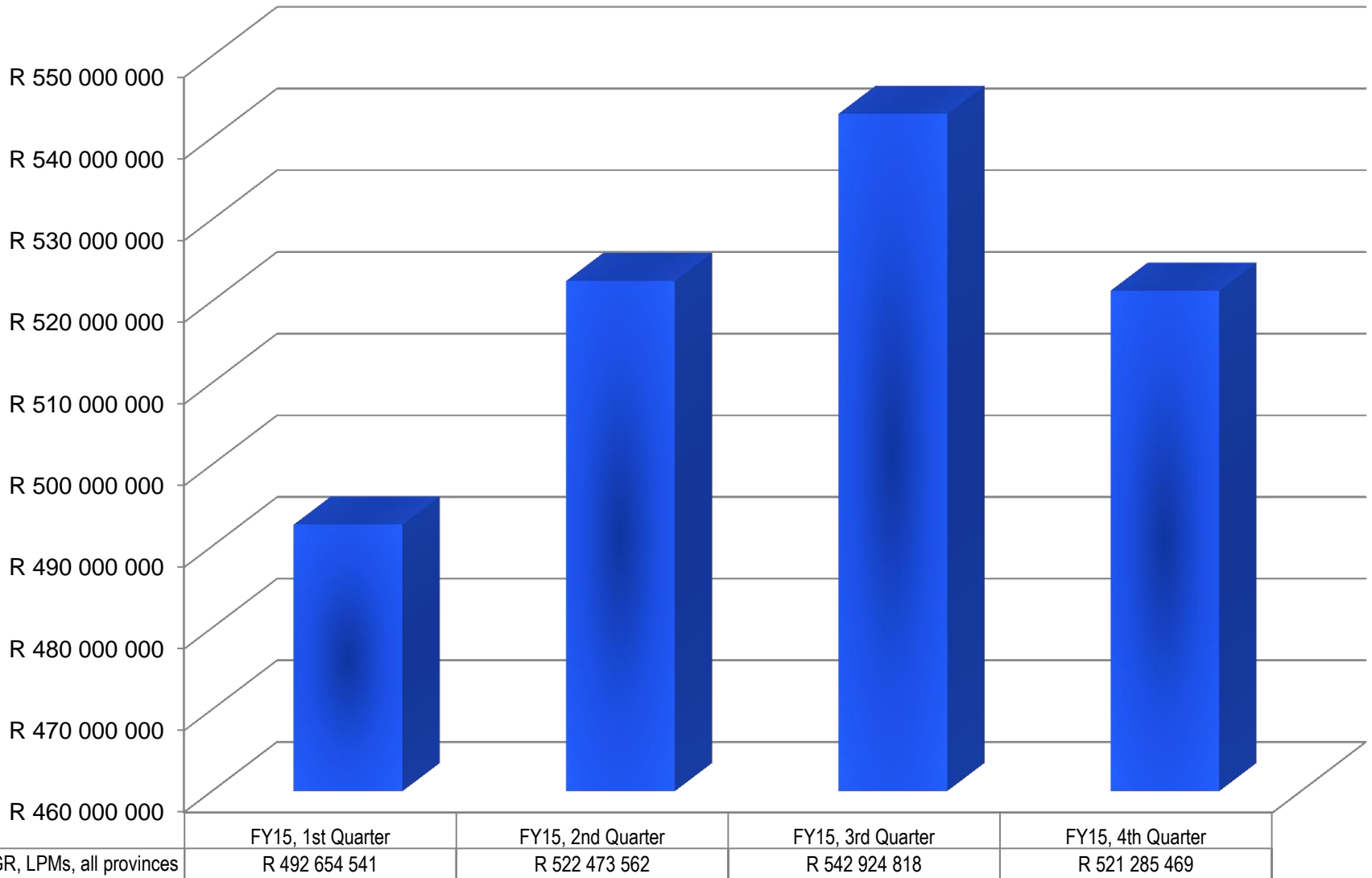
Rand value of the gross revenue of an operator



* LPMs not yet rolled out in Northern Cape

Trend in GGR LPMs – FY15, Qrt 1, 2, 3 & 4*

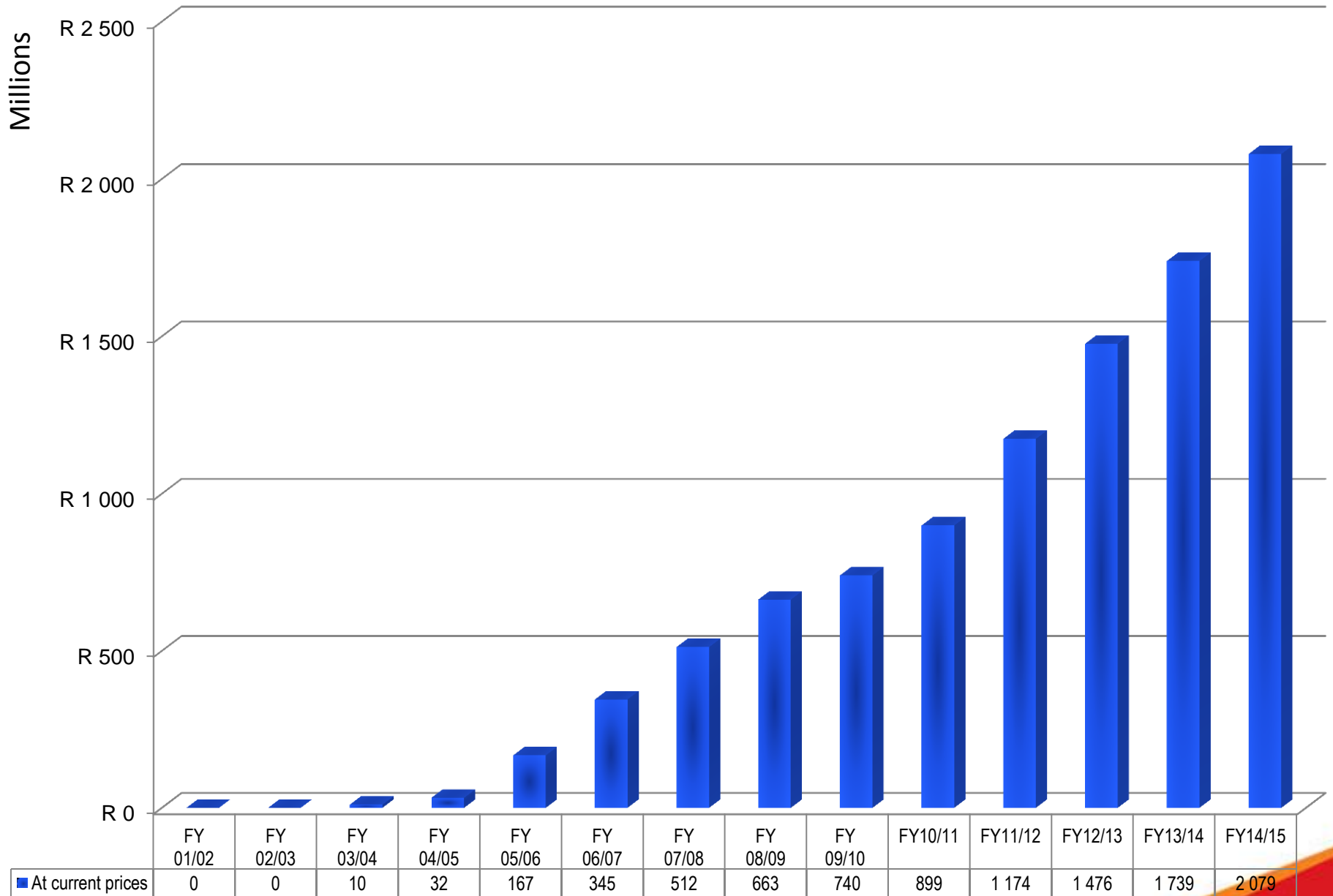
Rand value of the gross revenue of an operator



* LPMs not yet rolled out in Northern Cape

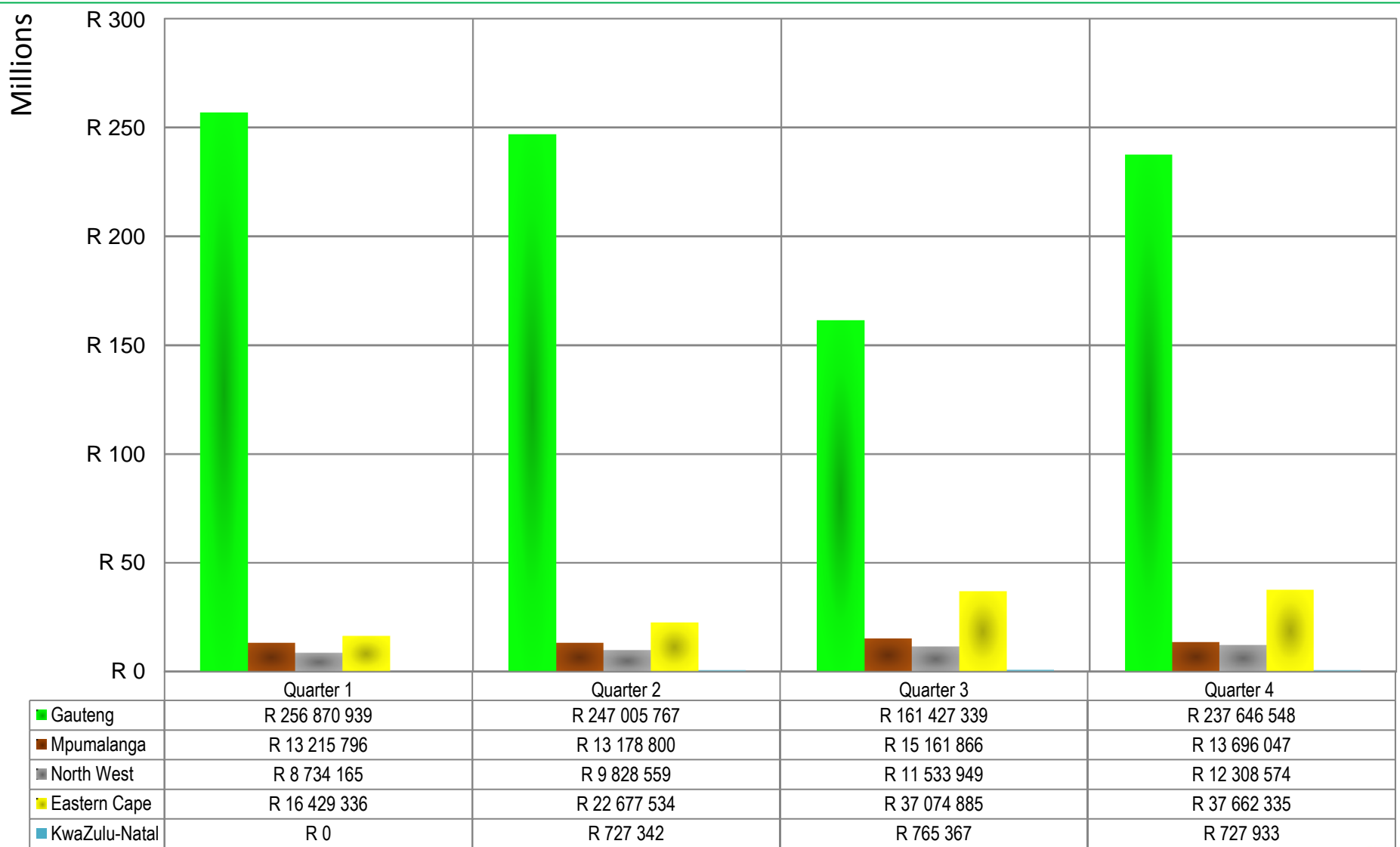
Trend in GGR LPMs – FY01/02 to FY15

Rand value of the gross revenue of an operator



Quarterly bingo GGR - FY2015, Qrt 1, 2, 3 & 4*

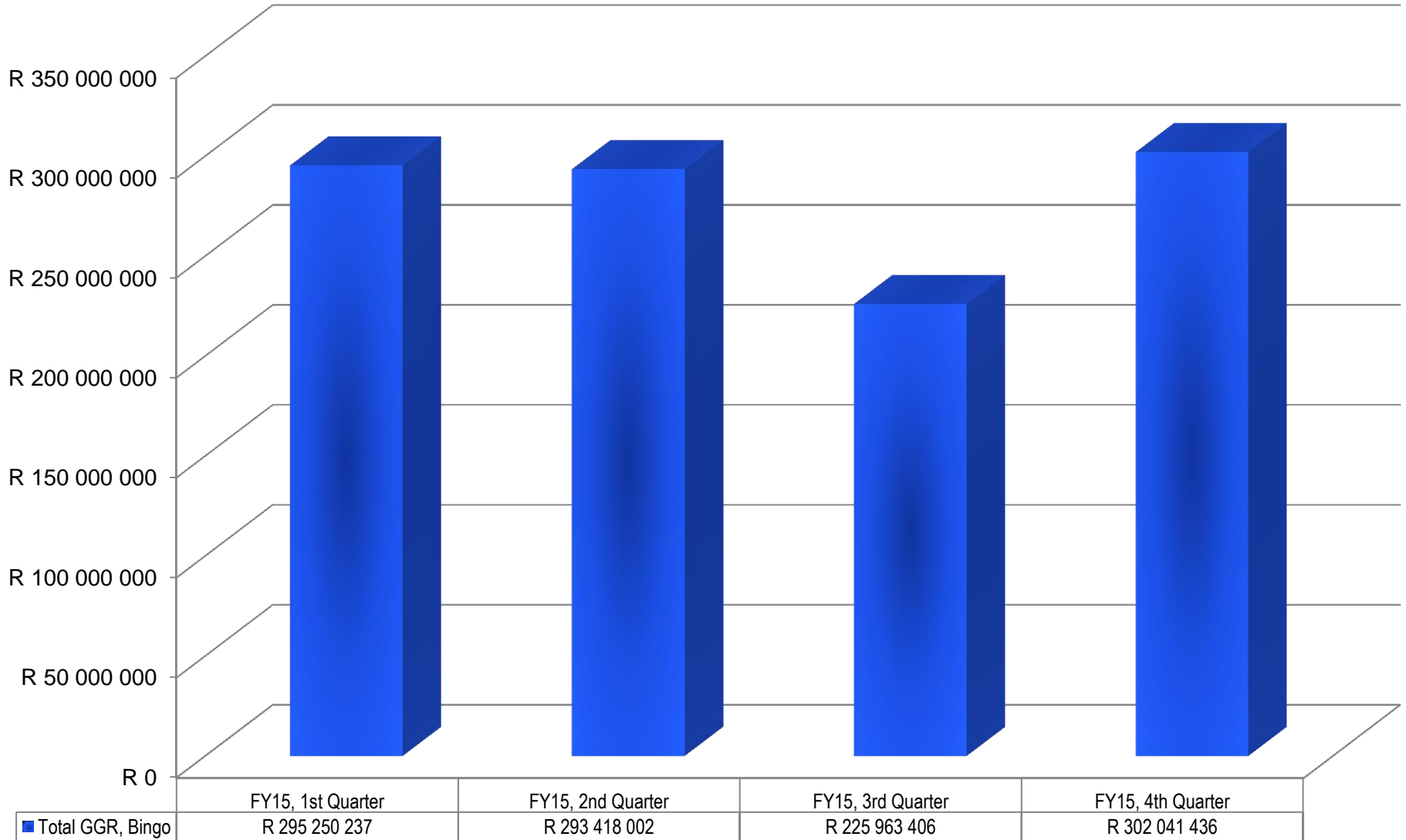
Rand value of the gross revenue of an operator



- 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 – FY15, Qrt 1, 2, 3 & 4*

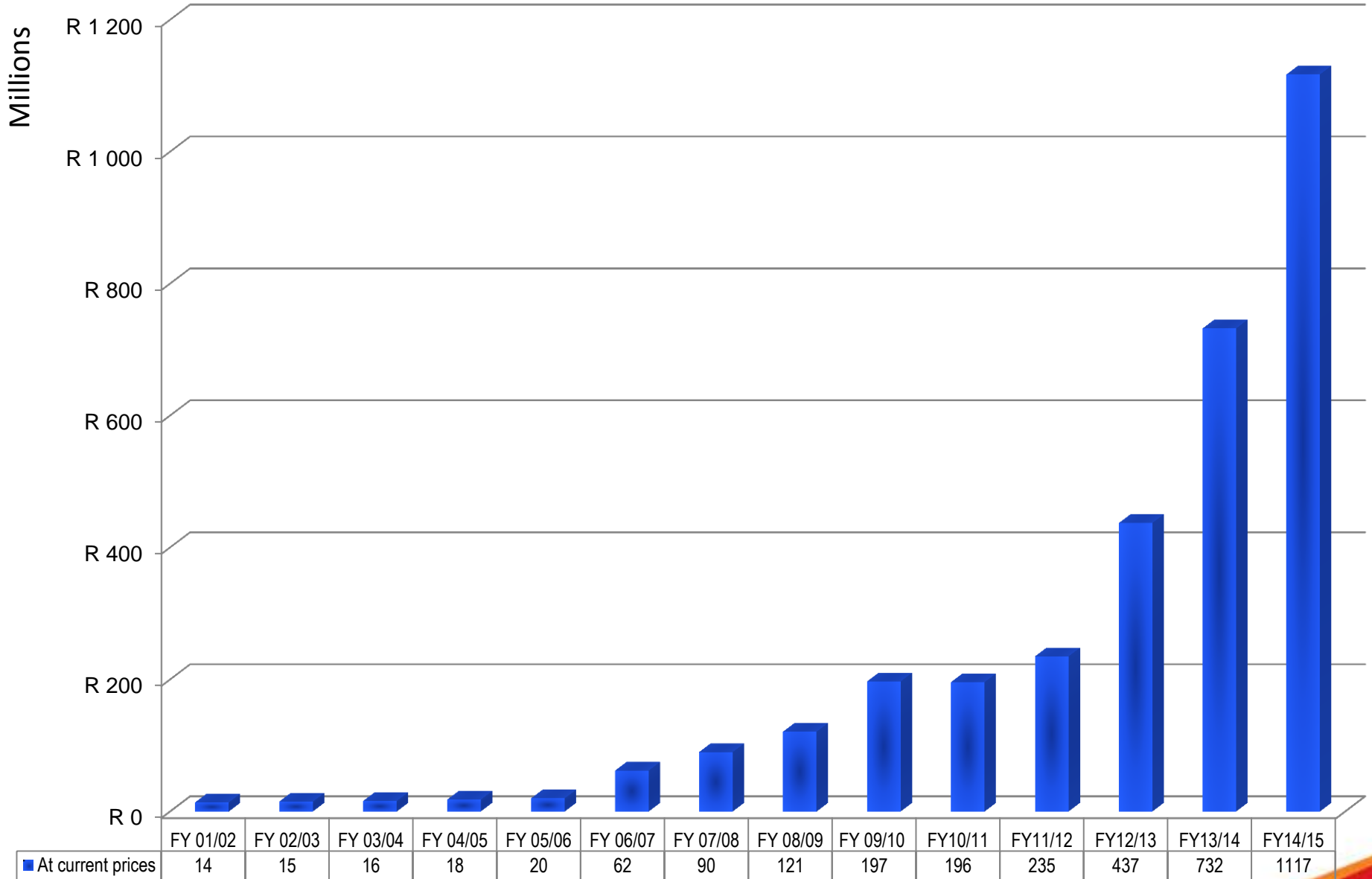
Rand value of the gross revenue of an operator



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

Trend in GGR bingo – FY01/02 to FY15*

Rand value of the gross revenue of an operator

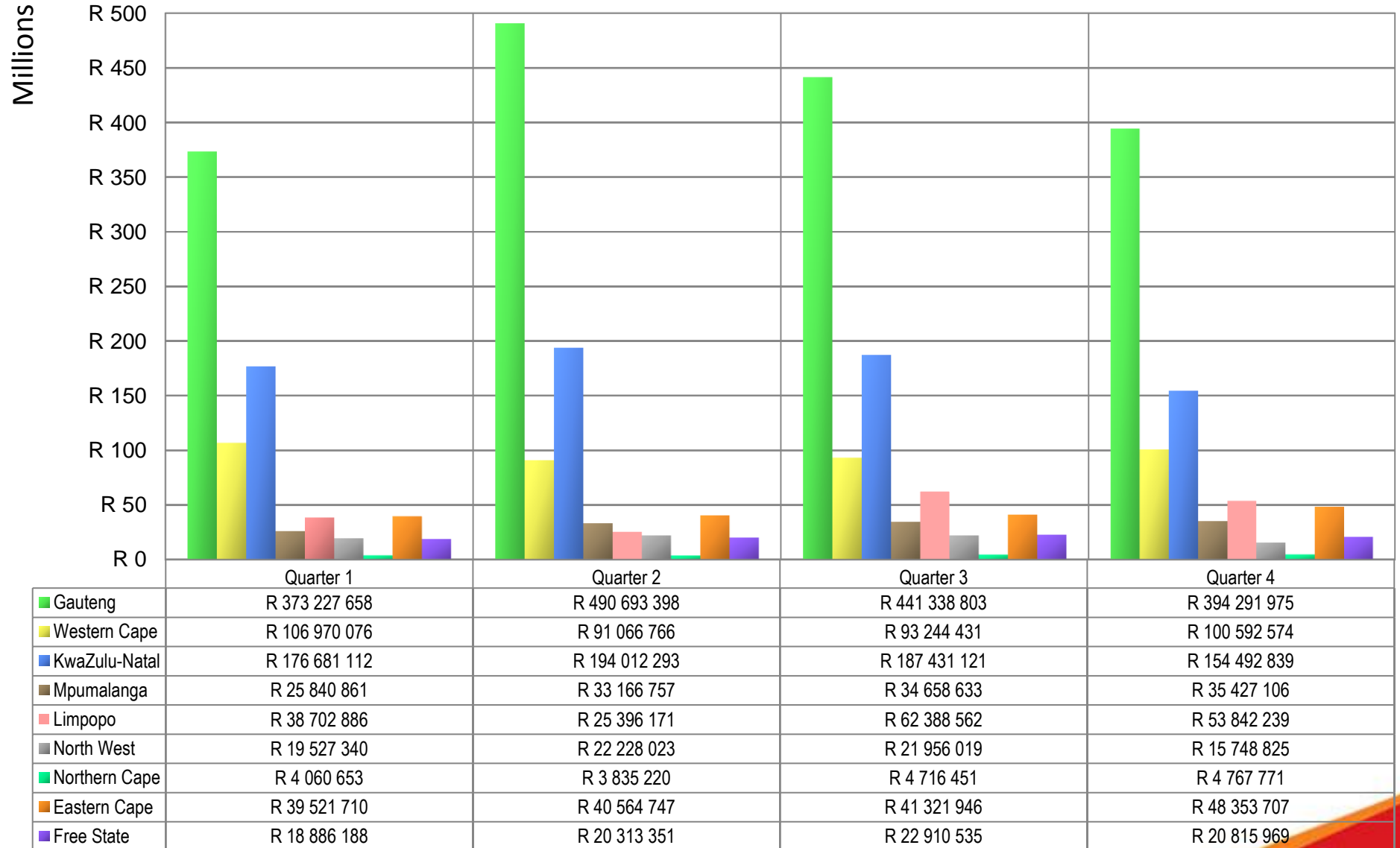


* Bingo statistics represents bingo offered for play in Gauteng, Mpumalanga, North West, Eastern Cape and KwaZulu-Natal only

Quarterly betting GGR – FY2015, Qrt 1, 2, 3 & 4

Bookmakers & Totalisators

Rand value of the gross revenue of an operator

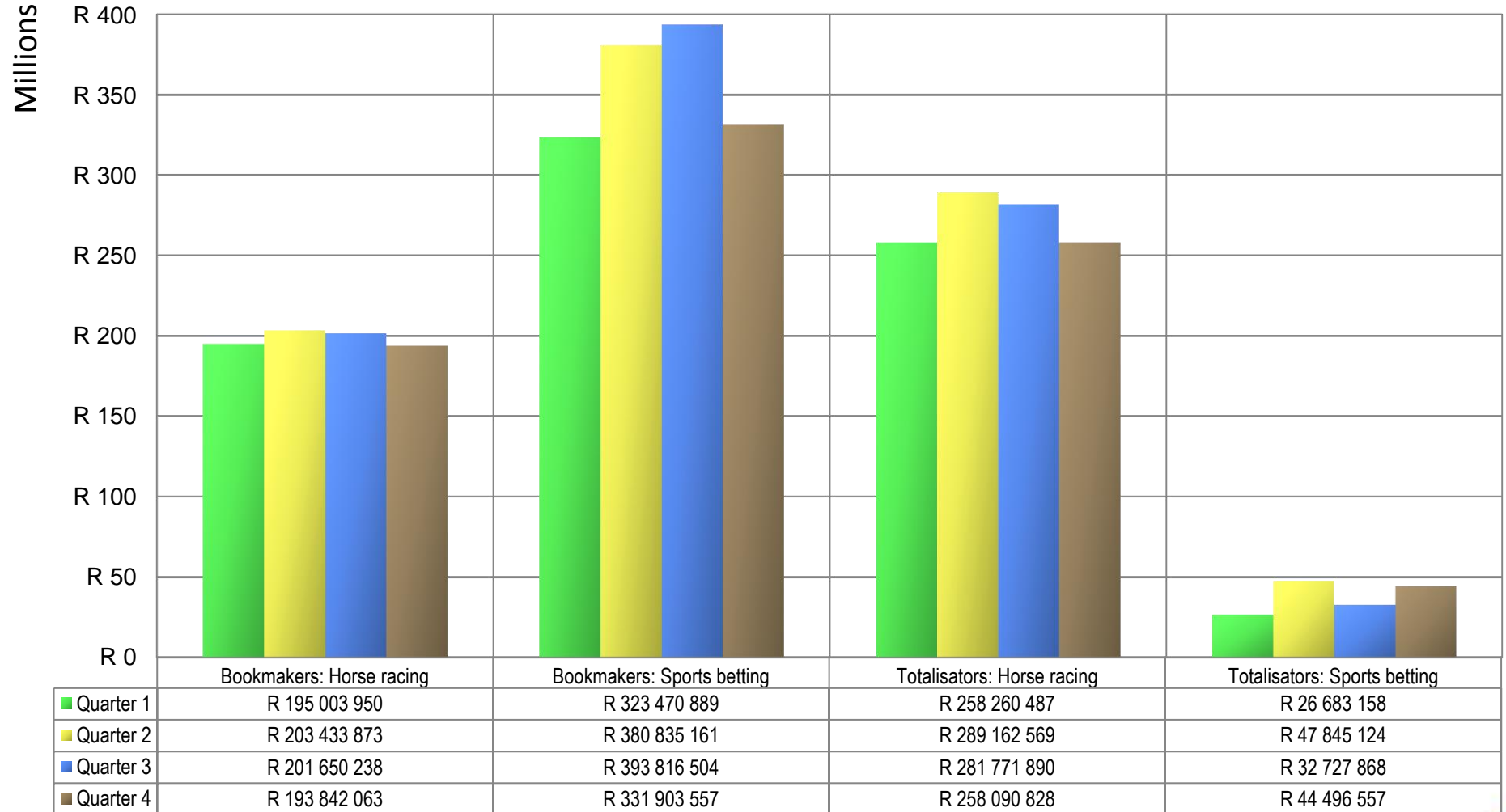


Quarterly betting GGR – FY2015, Qrt 1, 2, 3 & 4

Split between Bookmakers & Totalisators

Horse racing & Sports betting

Rand value of the gross revenue of an operator

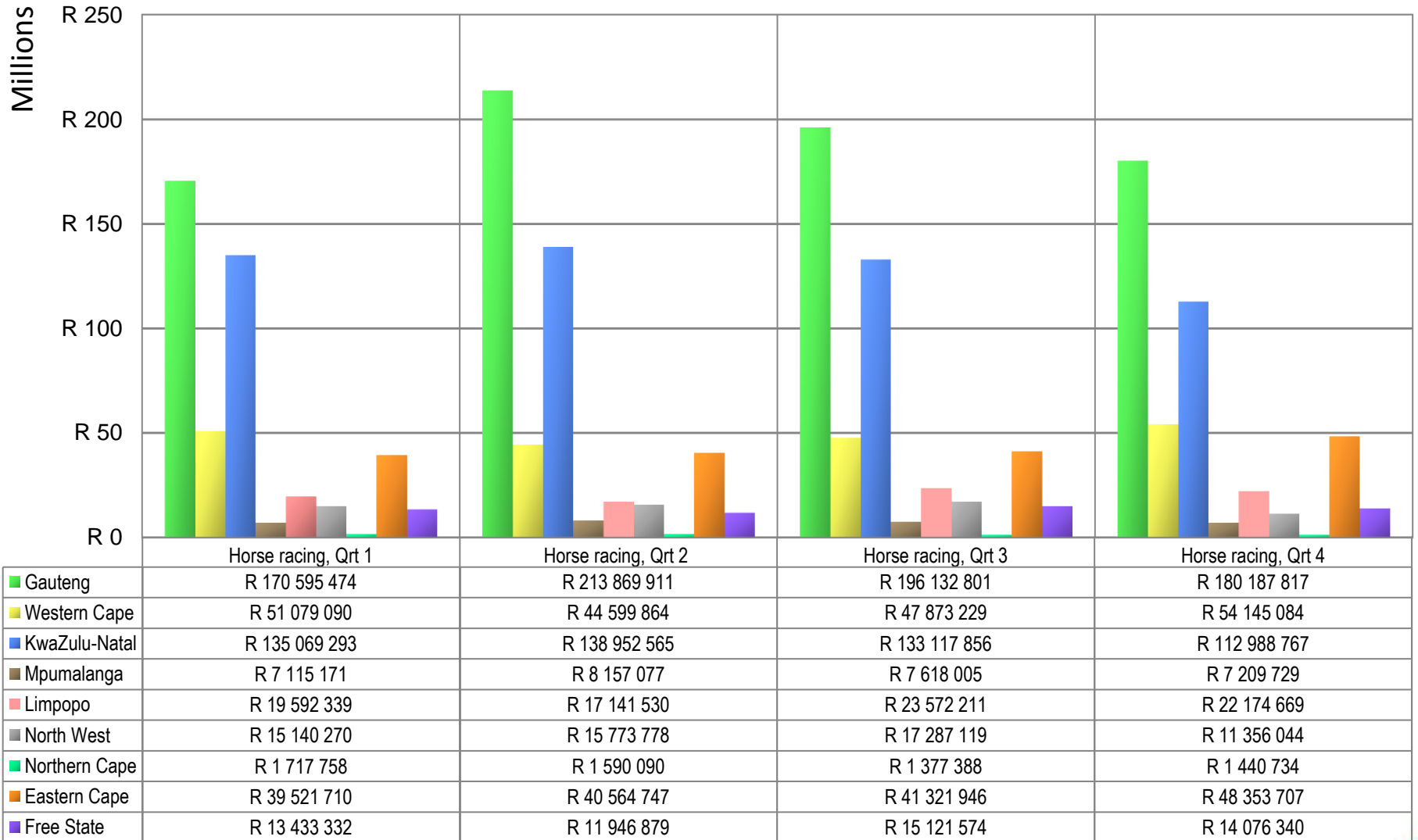


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting GGR – FY2015, Qrt 1, 2, 3 & 4

Horse racing*

Rand value of the gross revenue by an operator

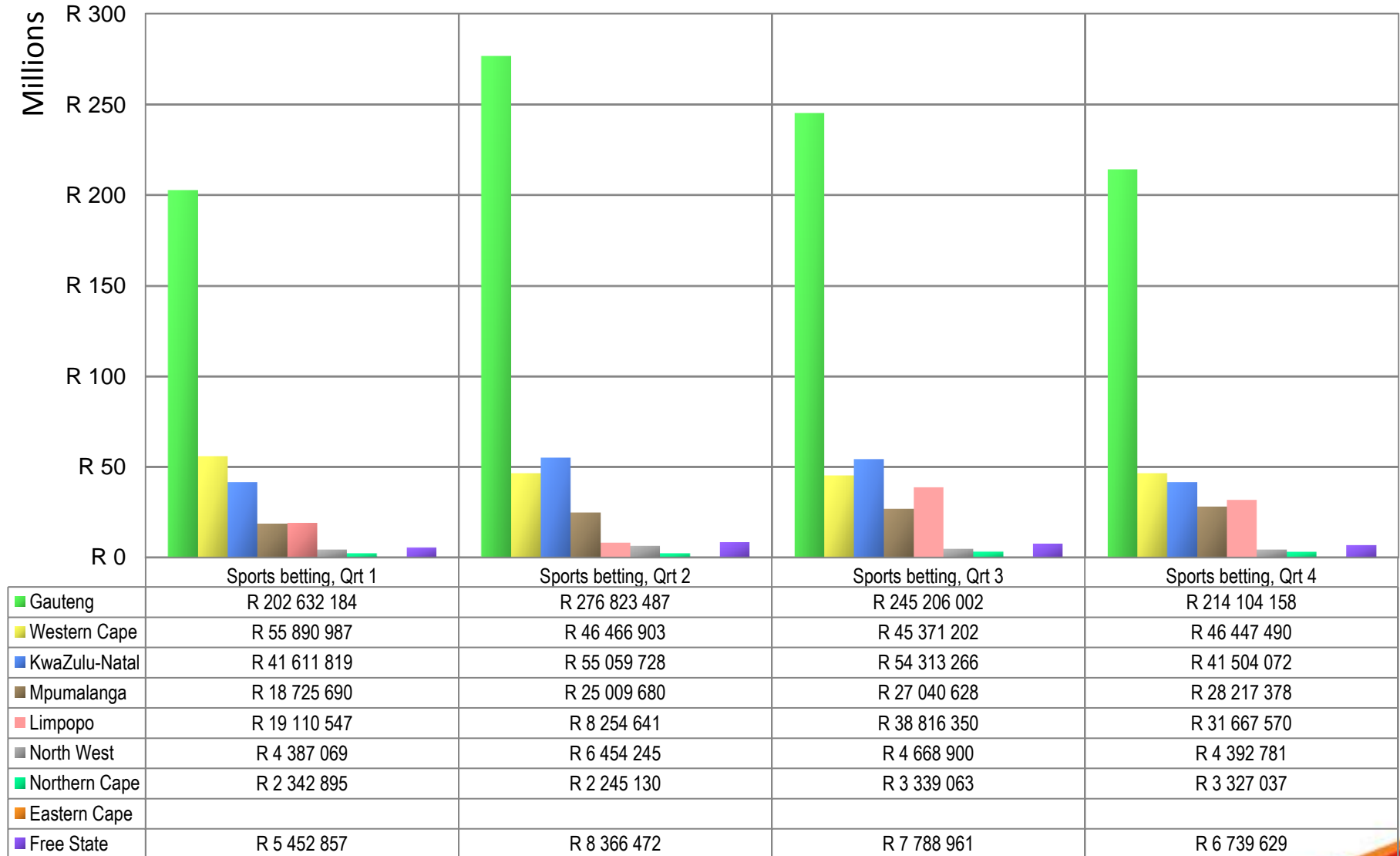


* Eastern Cape: Statistics includes sports betting

Quarterly betting GGR – FY2015, Qrt 1, 2, 3 & 4

Sports betting*

Rand value of the gross revenue by an operator

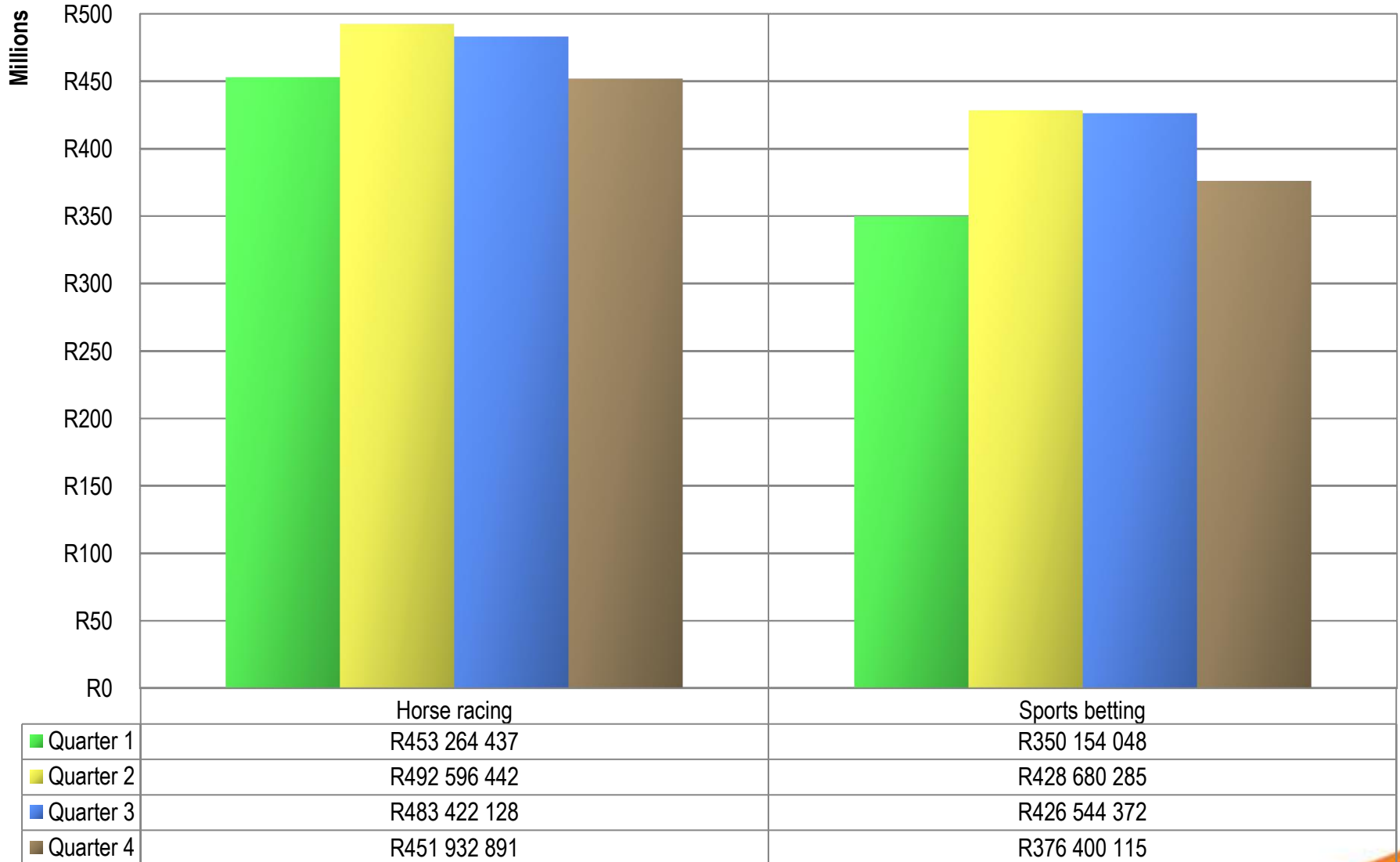


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting GGR – FY2015, Qrt 1, 2, 3 & 4

Split between Horse racing & Sports betting*

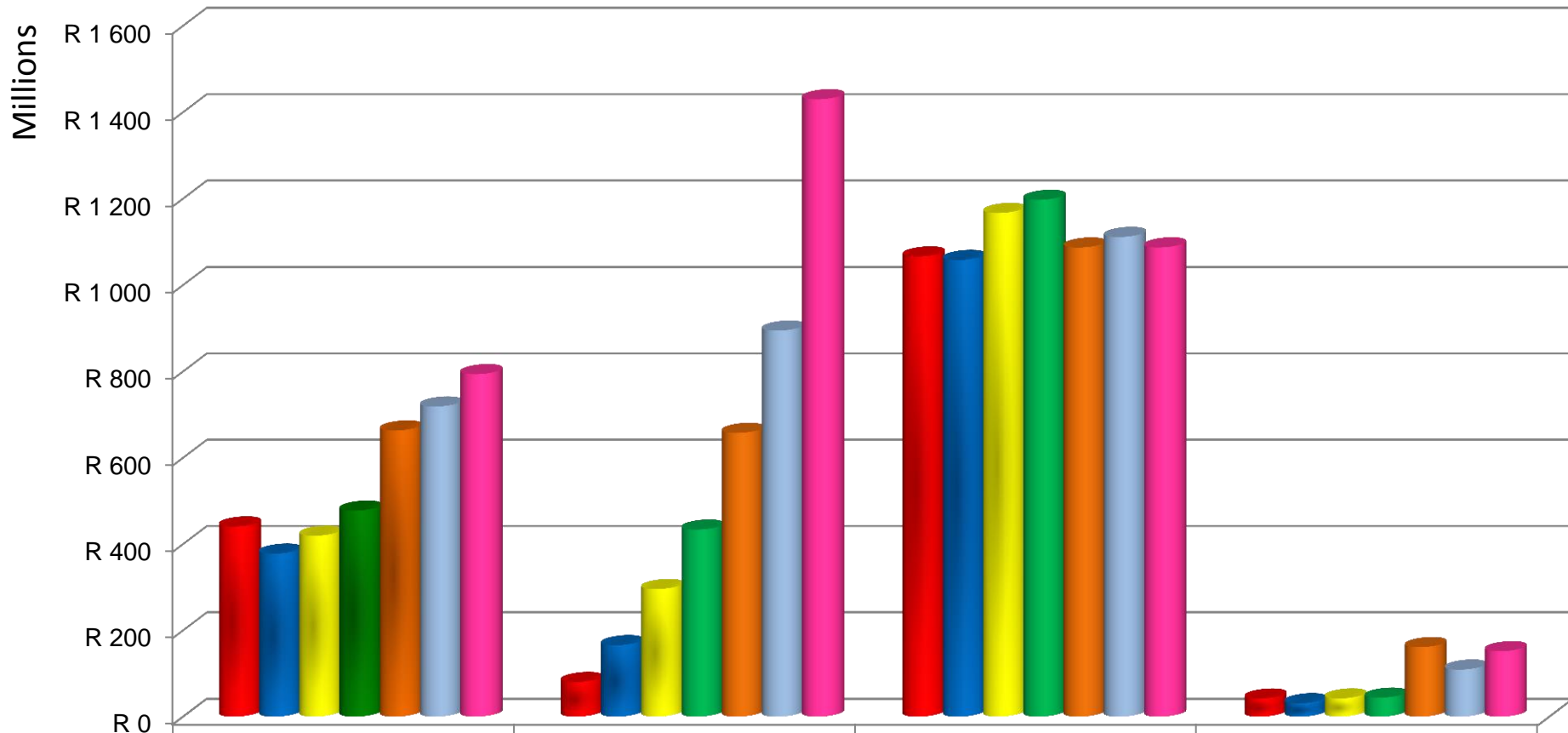
Rand value of the gross revenue by an operator



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Trend in GGR, bookmakers & totalisators - FY09 to FY15

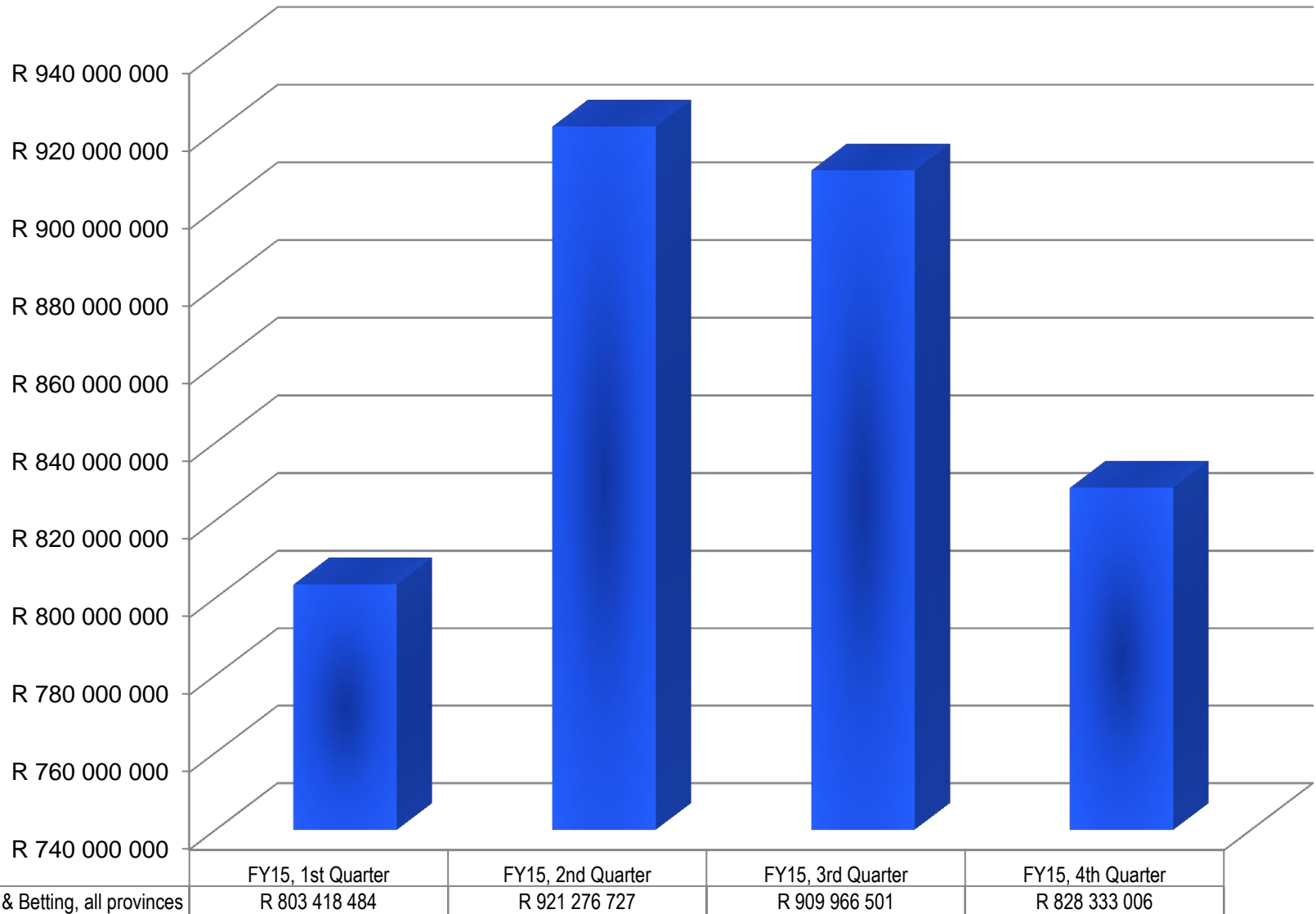
Rand value of the gross revenue by an operator



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
■ FY 09	R 440 988 115	R 80 484 490	R 1 066 258 328	R 42 038 484
■ FY 10	R 377 957 987	R 165 802 602	R 1 058 082 653	R 31 259 332
■ FY 11	R 419 579 088	R 295 931 592	R 1 167 008 013	R 42 418 390
■ FY 12	R 477 583 160	R 433 650 582	R 1 197 266 316	R 44 078 515
■ FY 13	R 663 367 356	R 657 721 132	R 1 087 051 664	R 161 294 882
■ FY 14	R 718 915 378	R 894 571 335	R 1 111 365 062	R 109 251 620
■ FY 15	R 793 930 124	R 1 430 026 112	R 1 087 285 775	R 151 752 708

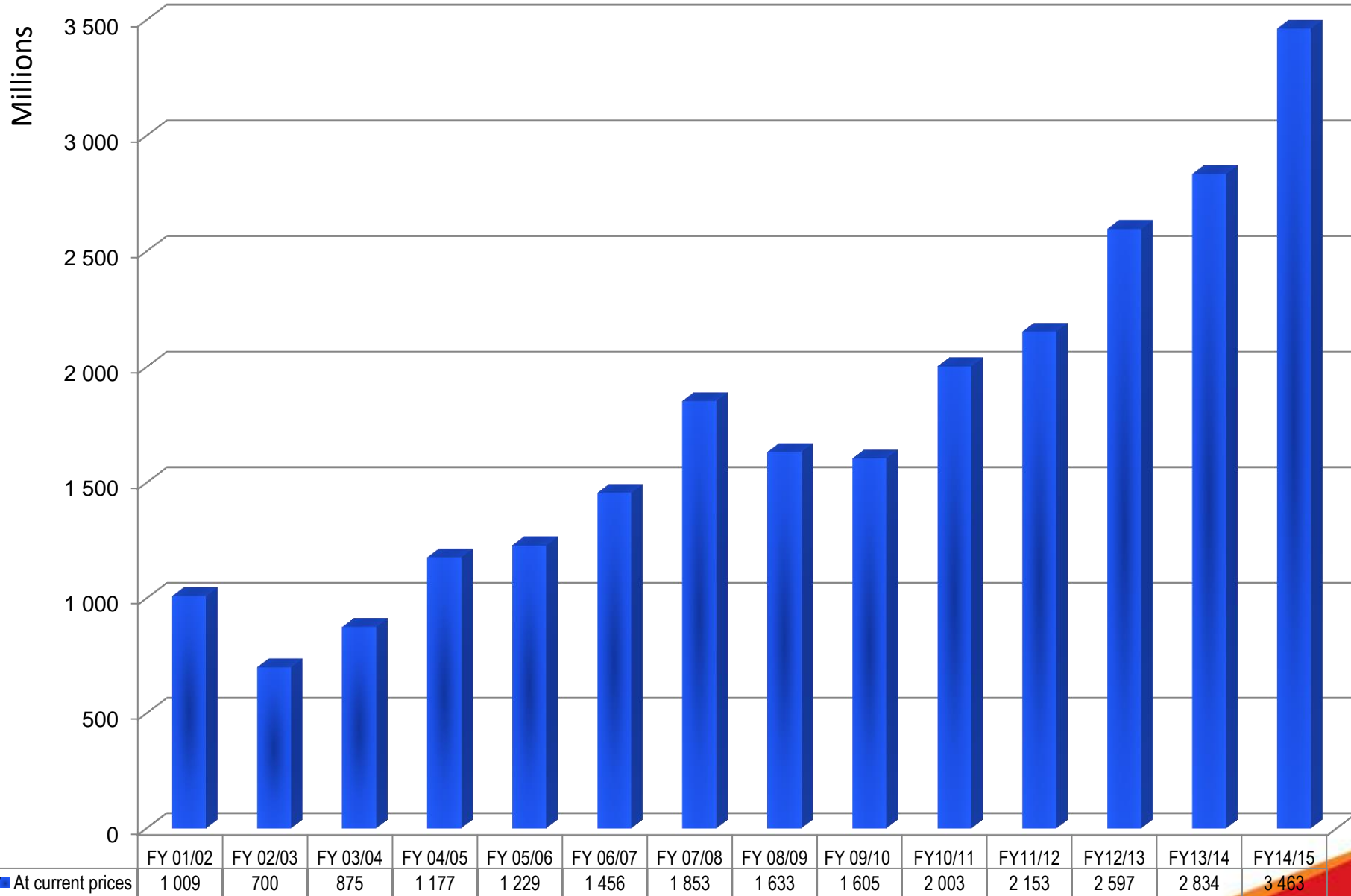
Trend in Racing & Betting – FY15, Qrt 1, 2, 3 & 4

Rand value of the gross revenue of an operator



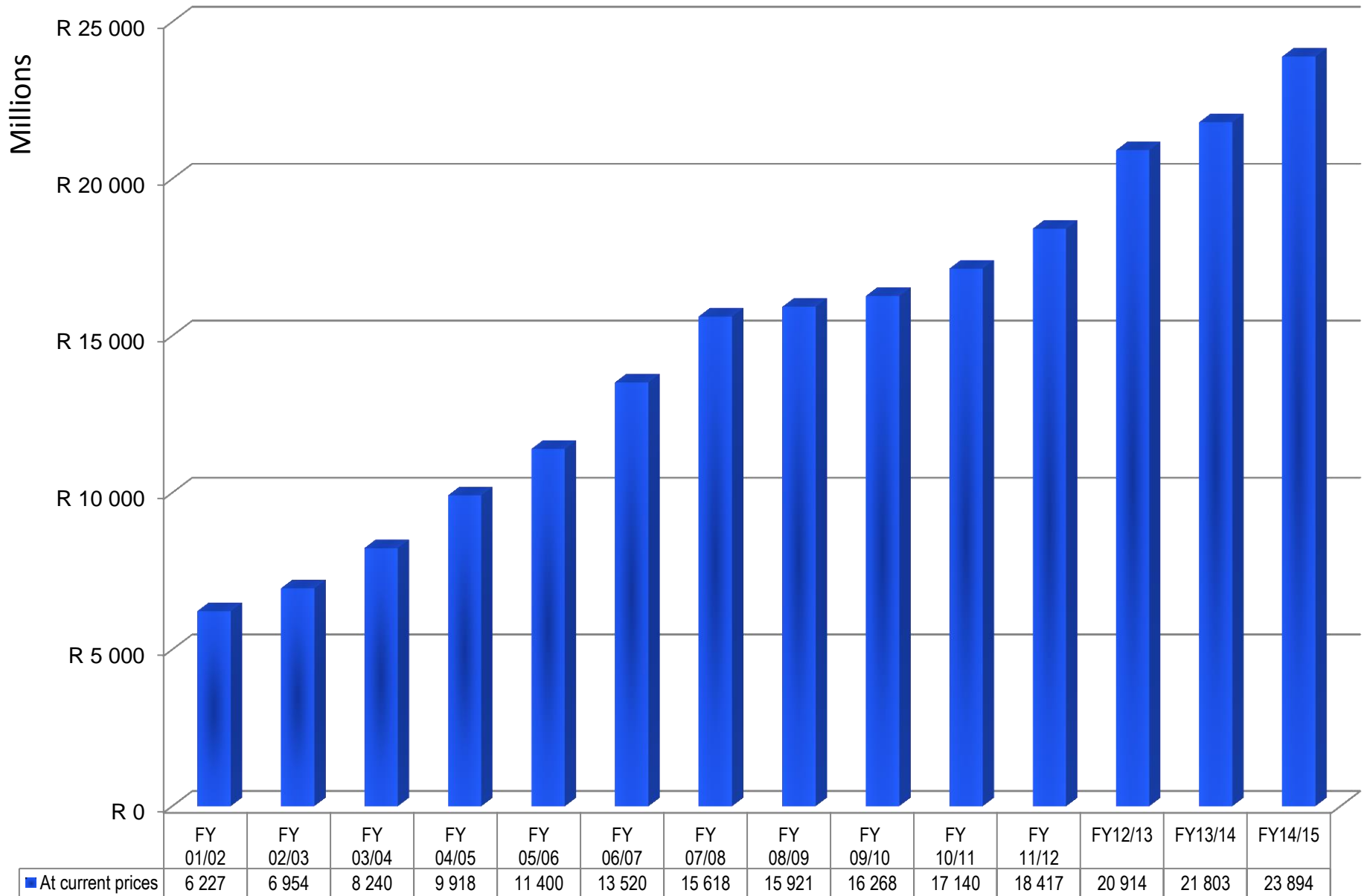
Trend in GGR betting – FY01/02 to FY15

Rand value of the gross revenue by an operator



Trend in GGR – FY01/02 to FY15 (all modes and provinces)

Rand value of the gross revenue by an operator



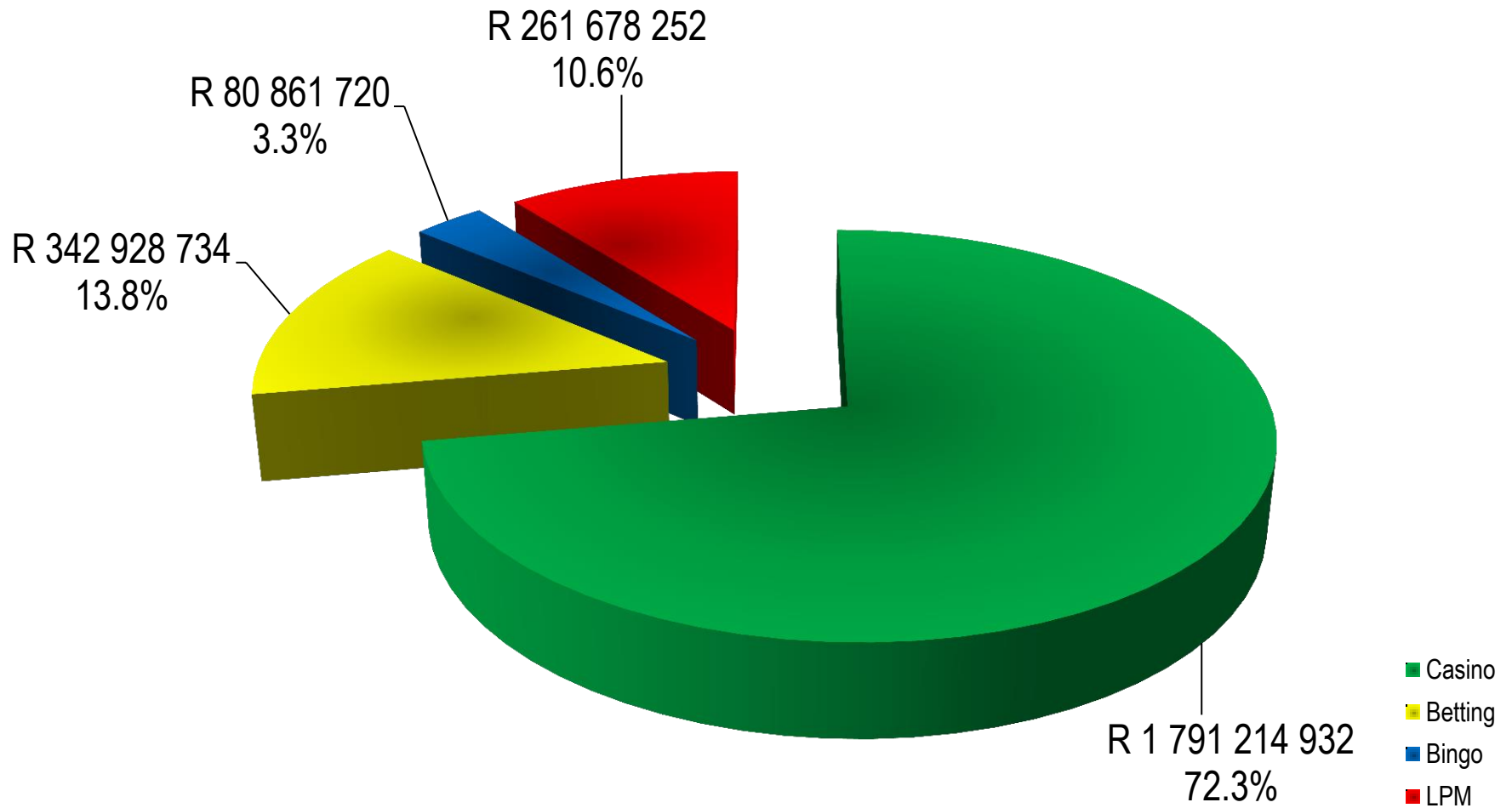
Summary : GGR

- ❑ GGR increased by 13.6% from R18,4 billion in FY12 to R20,9 billion in FY13, by 4.3% to R21,8 billion in FY14, and by 9.6% to R23,9 billion in FY15.
- ❑ During FY15, as at 31 March 2015, casinos accounted for the highest GGR generated being 72.1% as compared to other gambling modes.
- ❑ A sharp increase in GGR generated by bookmakers offering betting on sport is recorded.
- ❑ Compared to all other provinces, Gauteng at a 42.4% share, accounted for the highest amount of GGR generated.

Taxes/levies contribution per gambling mode – FY2015

Qrt 1, 2, 3 & 4

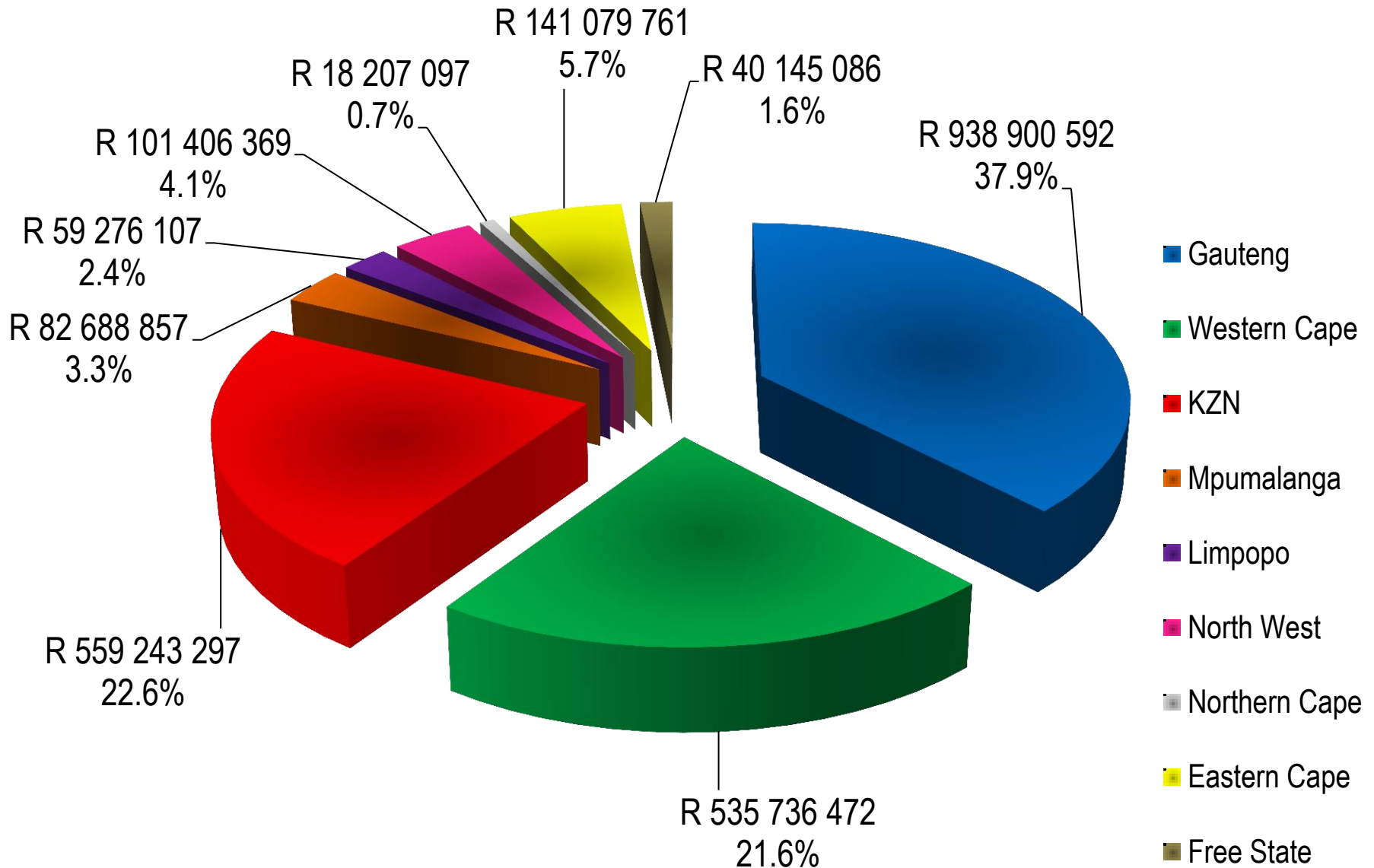
Gambling tax levied and collected by PLAs



Total taxes/levies: R 2 476 683 639

Taxes/levies contribution per province – FY2015, Qrt 1, 2, 3 & 4

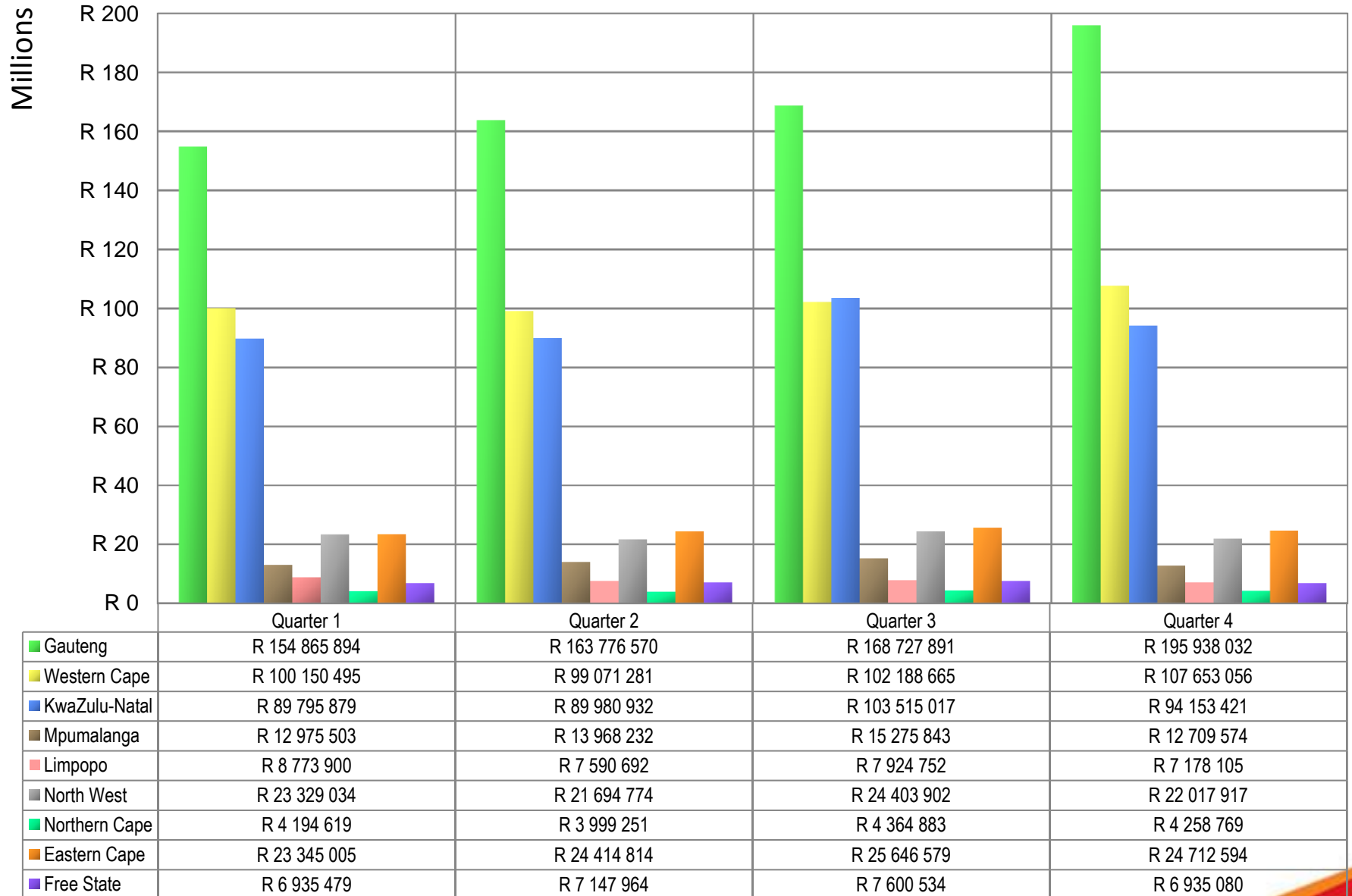
Gambling tax levied and collected by PLAs



Total taxes/levies: R 2 476 683 639

Quarterly casino taxes/levies - FY2015, Qrt 1, 2, 3 & 4

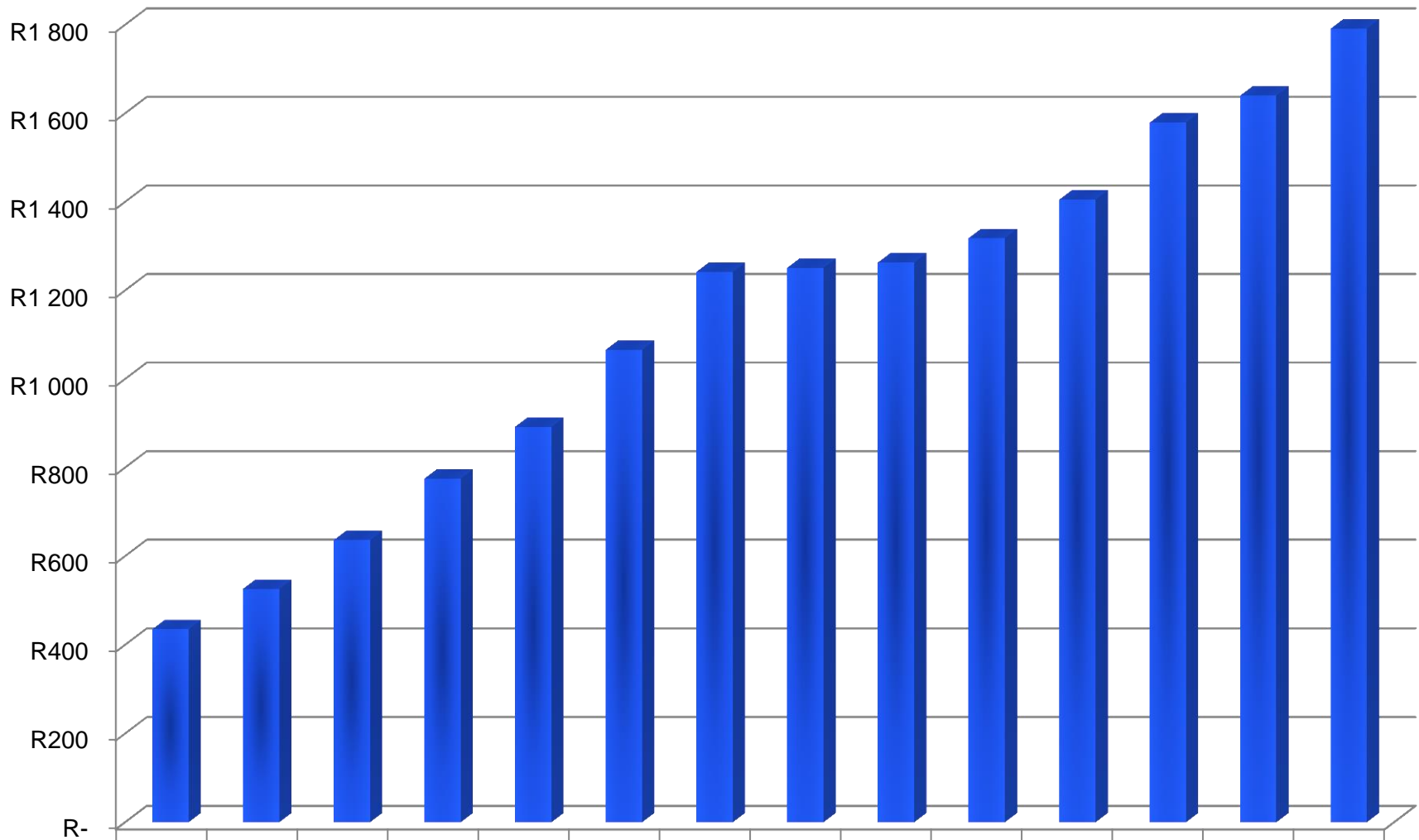
Gambling tax levied and collected by PLAs



Trend in casino, taxes/levies – FY01/02 to FY15

Gambling tax levied and collected by PLAs

Millions

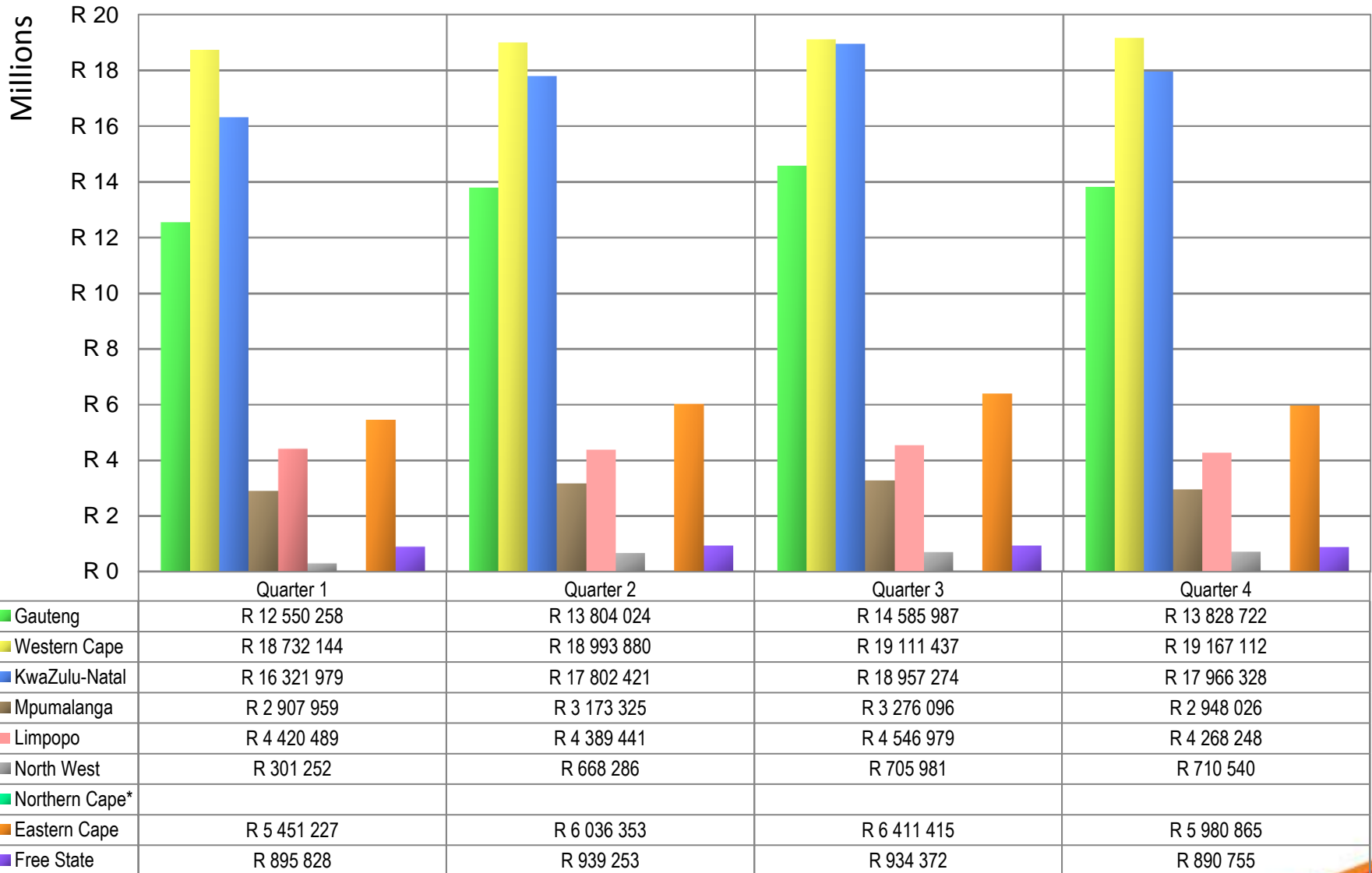


■ At current prices

435	526	636	775	892	1 066	1 242	1 251	1 263	1 318	1 405	1 579	1 640	1 791
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Quarterly LPM taxes/levies - FY2015, Qrt 1, 2, 3 & 4*

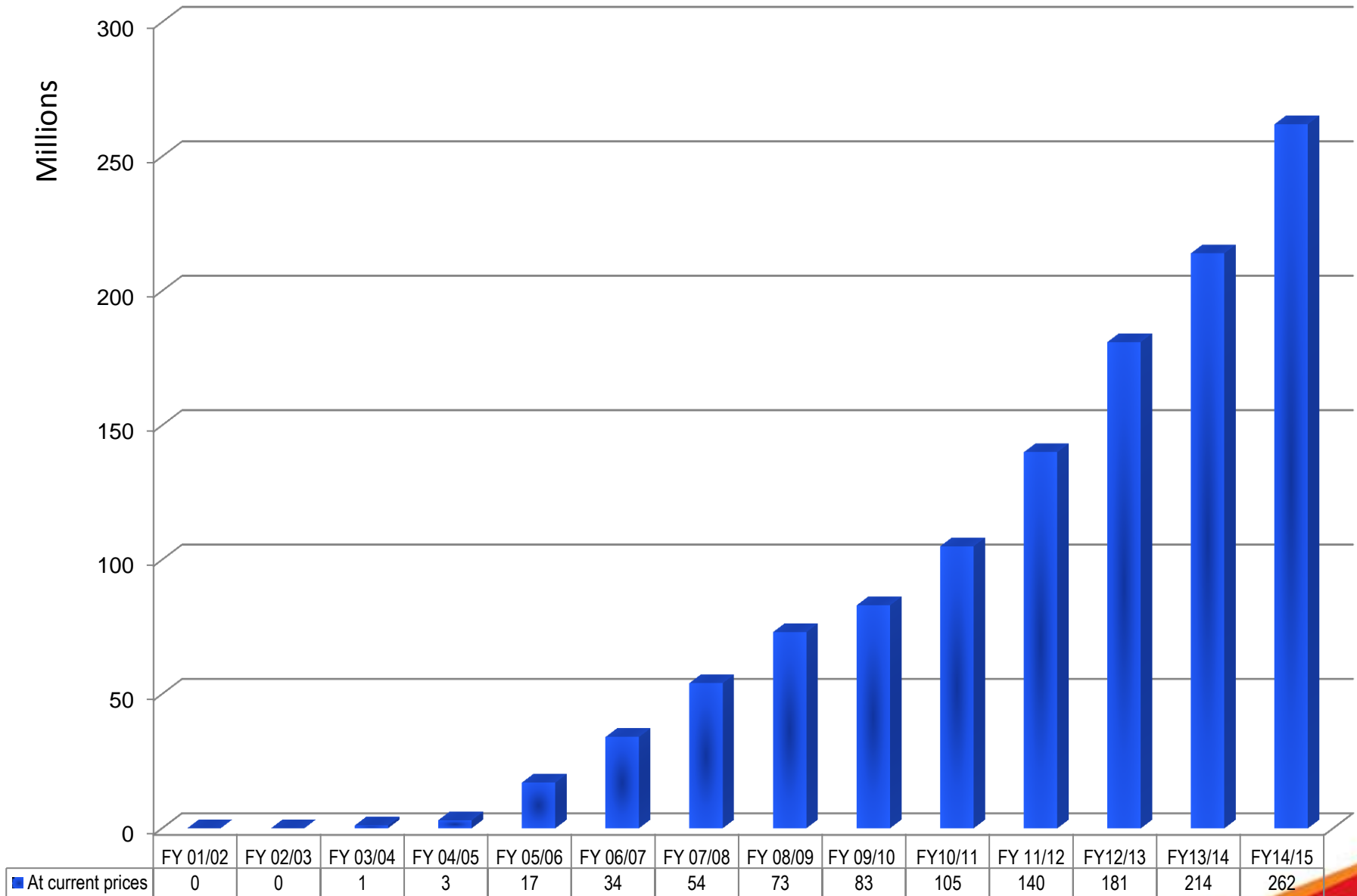
Gambling tax levied and collected by PLAs



* LPMs not yet rolled out in Northern Cape

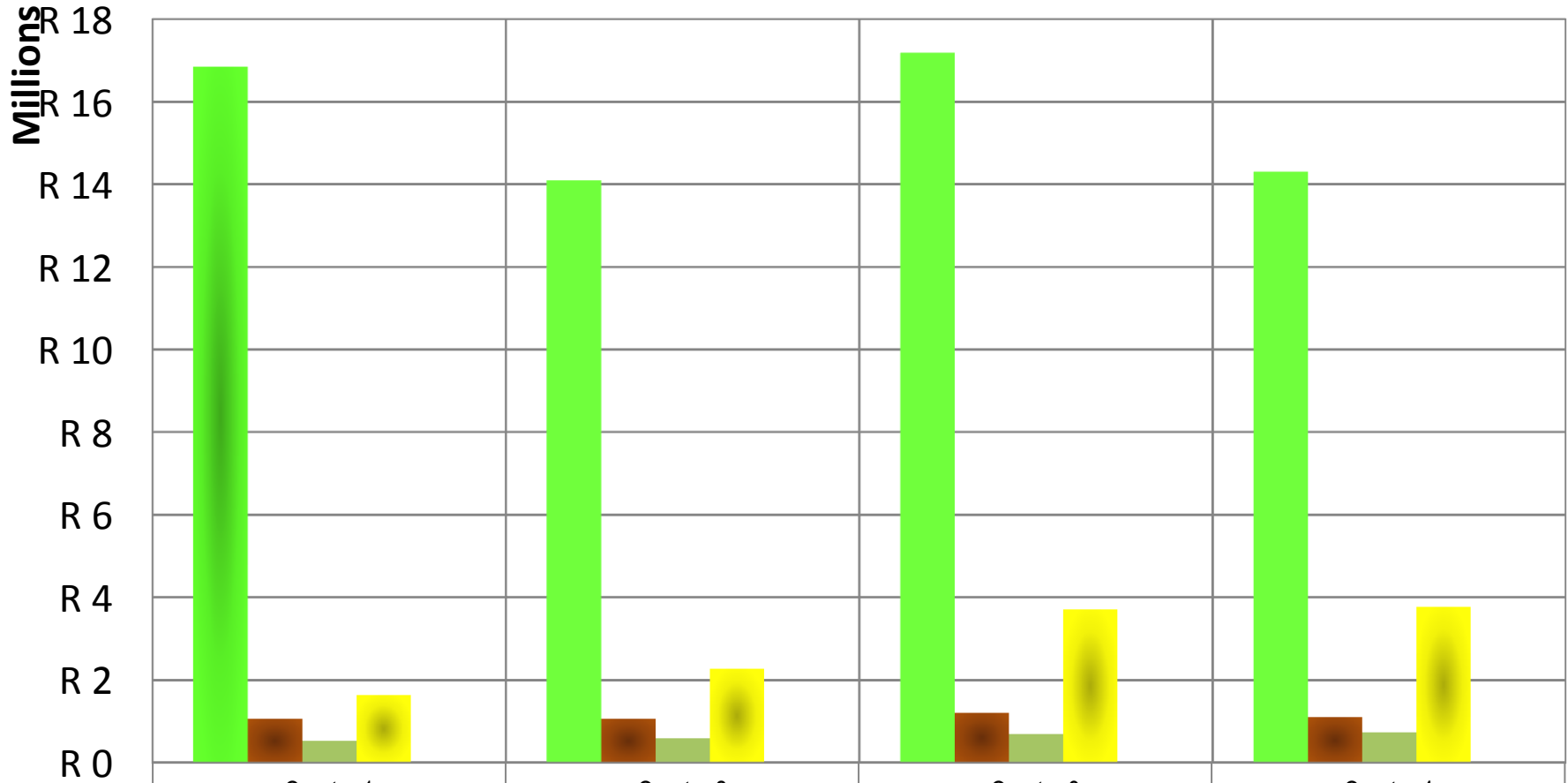
Trend in LPM taxes/levies – FY01/02 to FY14/15

Gambling tax levied and collected by PLAs



Quarterly bingo taxes/levies - FY2015, Qrt 1, 2, 3 & 4*

Gambling tax levied by and collected by PLAs

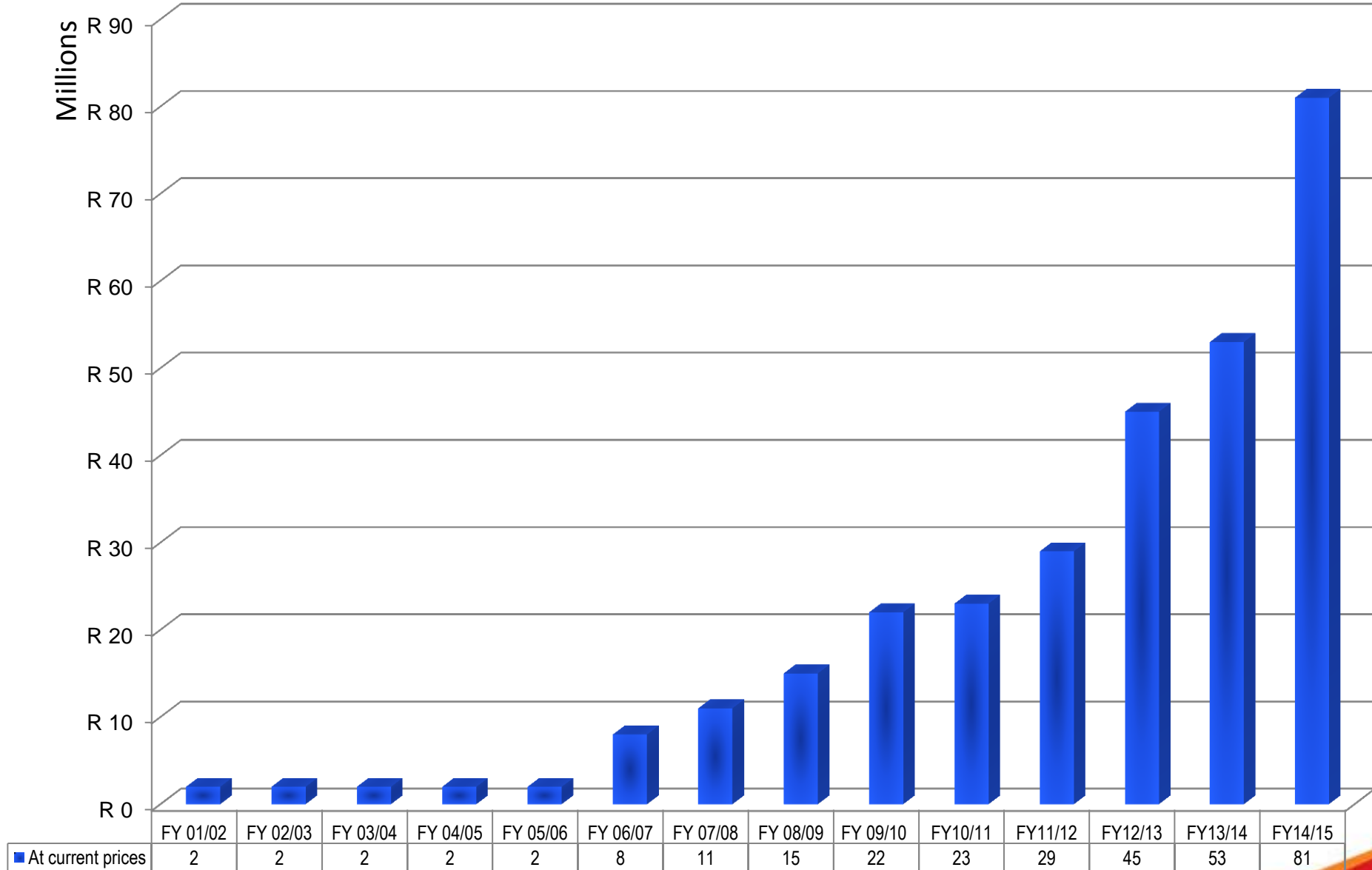


	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Gauteng	R 16 846 026	R 14 091 212	R 17 187 806	R 14 311 010
Mpumalanga	R 1 057 264	R 1 054 304	R 1 212 949	R 1 095 684
North West	R 524 050	R 589 714	R 691 946	R 738 514
Eastern Cape	R 1 642 934	R 2 269 327	R 3 710 779	R 3 771 582
KwaZulu-Natal	R 0	R 21 820	R 22 961	R 21 838

- 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 – FY01/02 to FY14/15

Gambling tax levied by and collected by PLAs

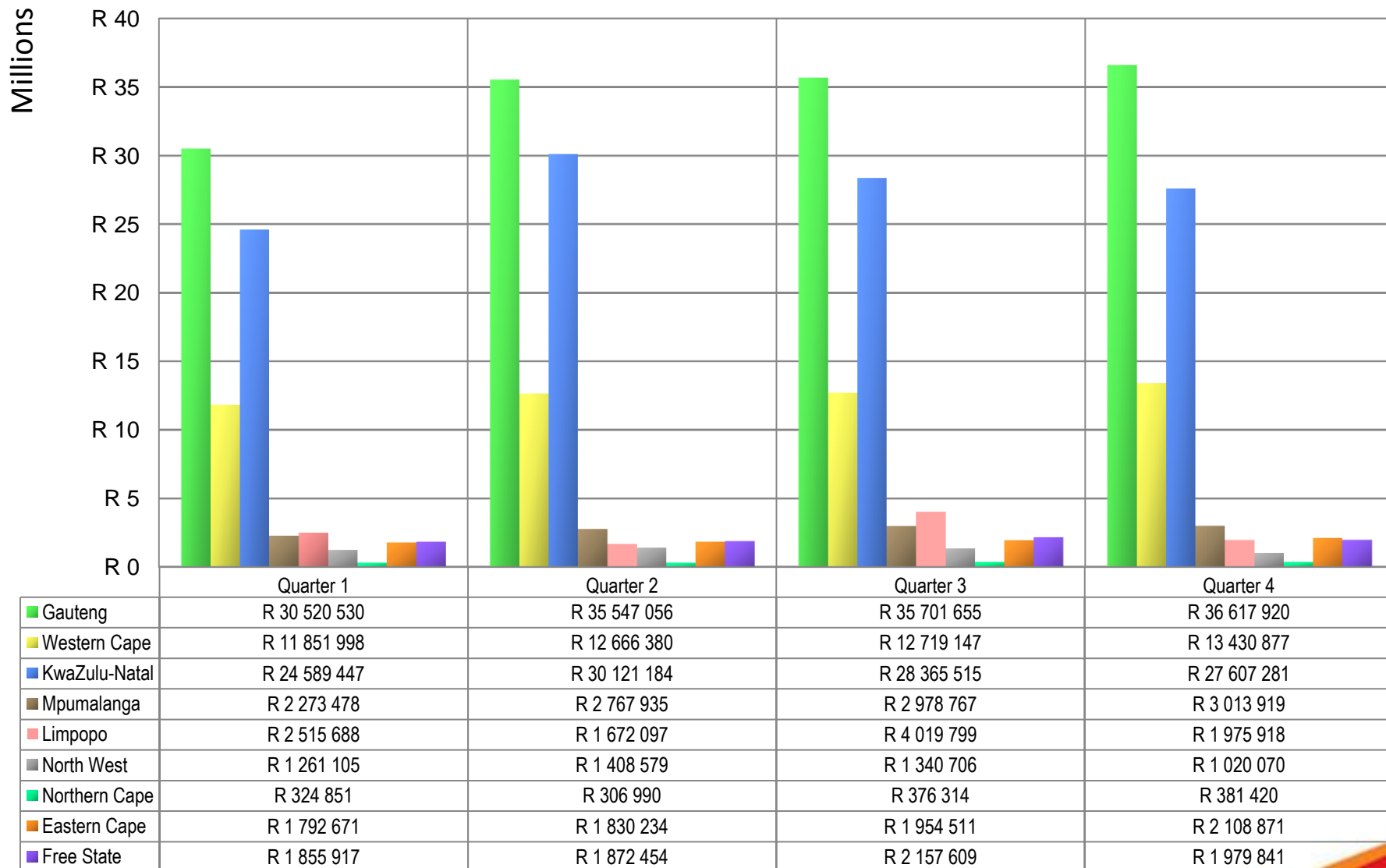


* Bingo statistics represents bingo offered for play in Gauteng, Mpumalanga, North West, KwaZulu-Natal and Eastern Cape only

Quarterly betting taxes/levies – FY2015 Qrt 1, 2, 3 & 4

Bookmakers & Totalisators

Gambling tax levied and collected by PLAs

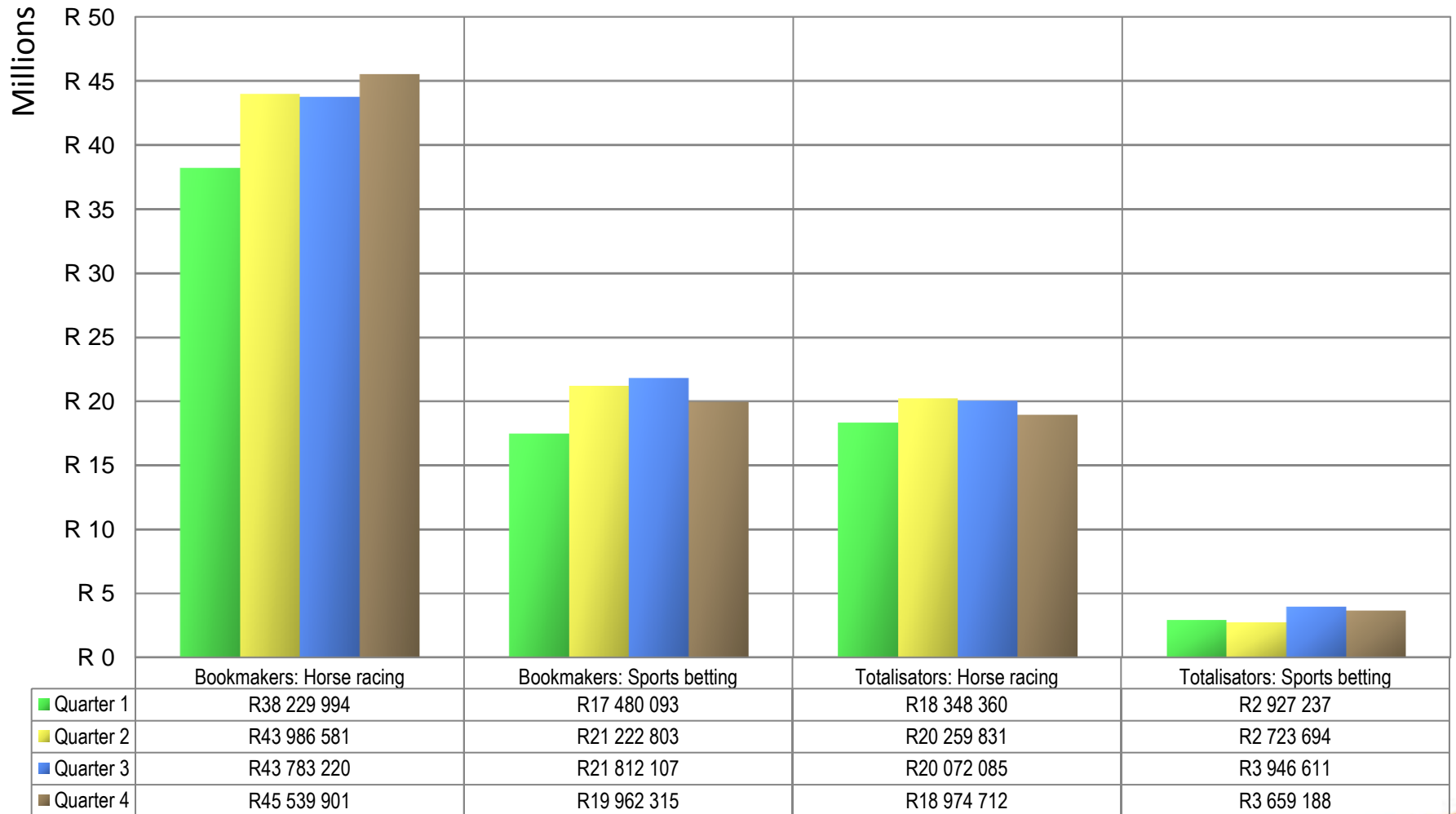


Quarterly betting taxes/levies – FY2015, Qrt 1, 2, 3 & 4

Split between Bookmakers & Totalisators

Horse racing & Sports betting

Gambling tax levied and collected by PLAs

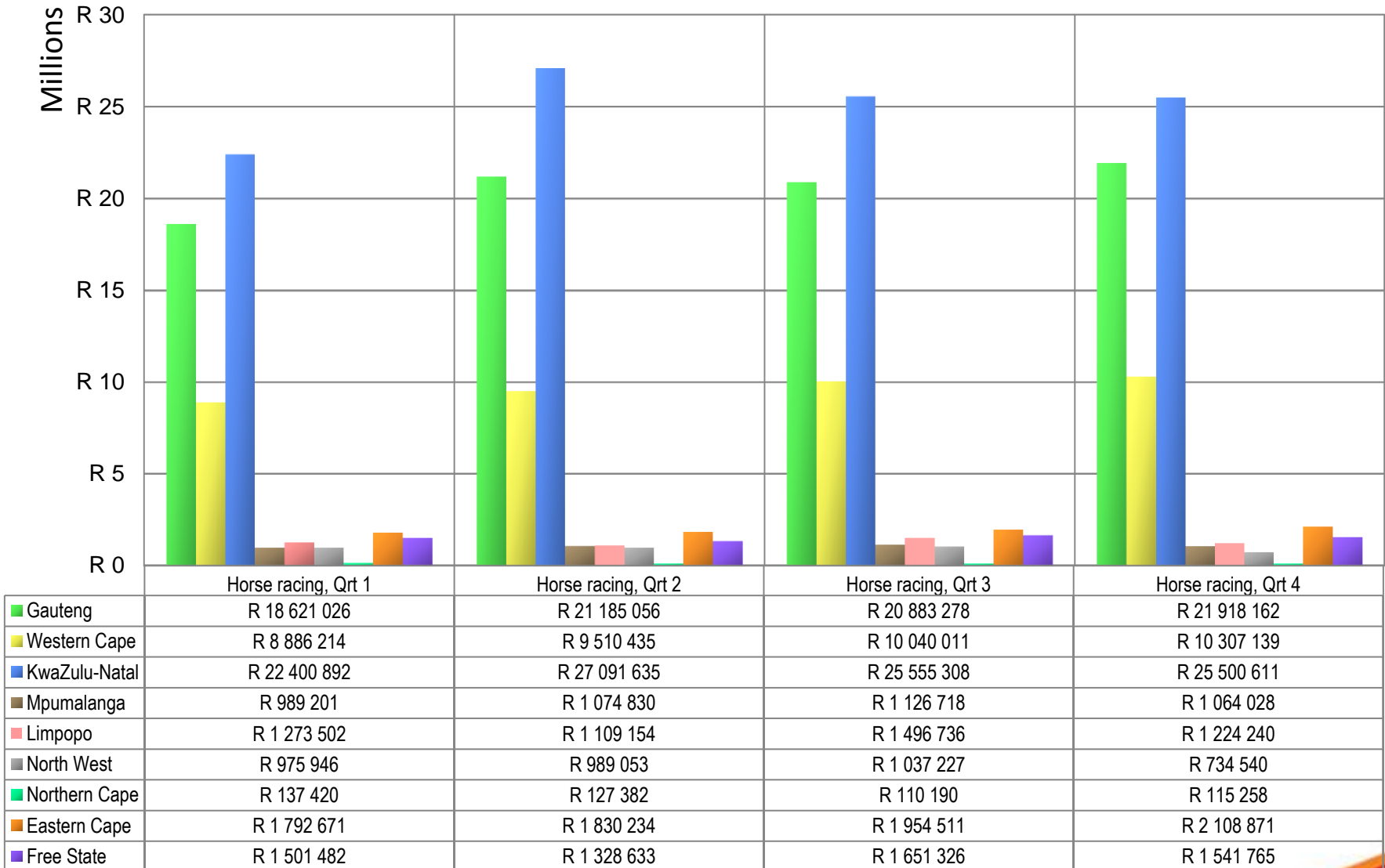


* Eastern Cape: Statistics for sports betting is included in the horse racing statistics

Quarterly betting taxes/levies – FY2015, Qrt 1, 2, 3 & 4

Horse racing*

Gambling tax levied by and collected by PLAs

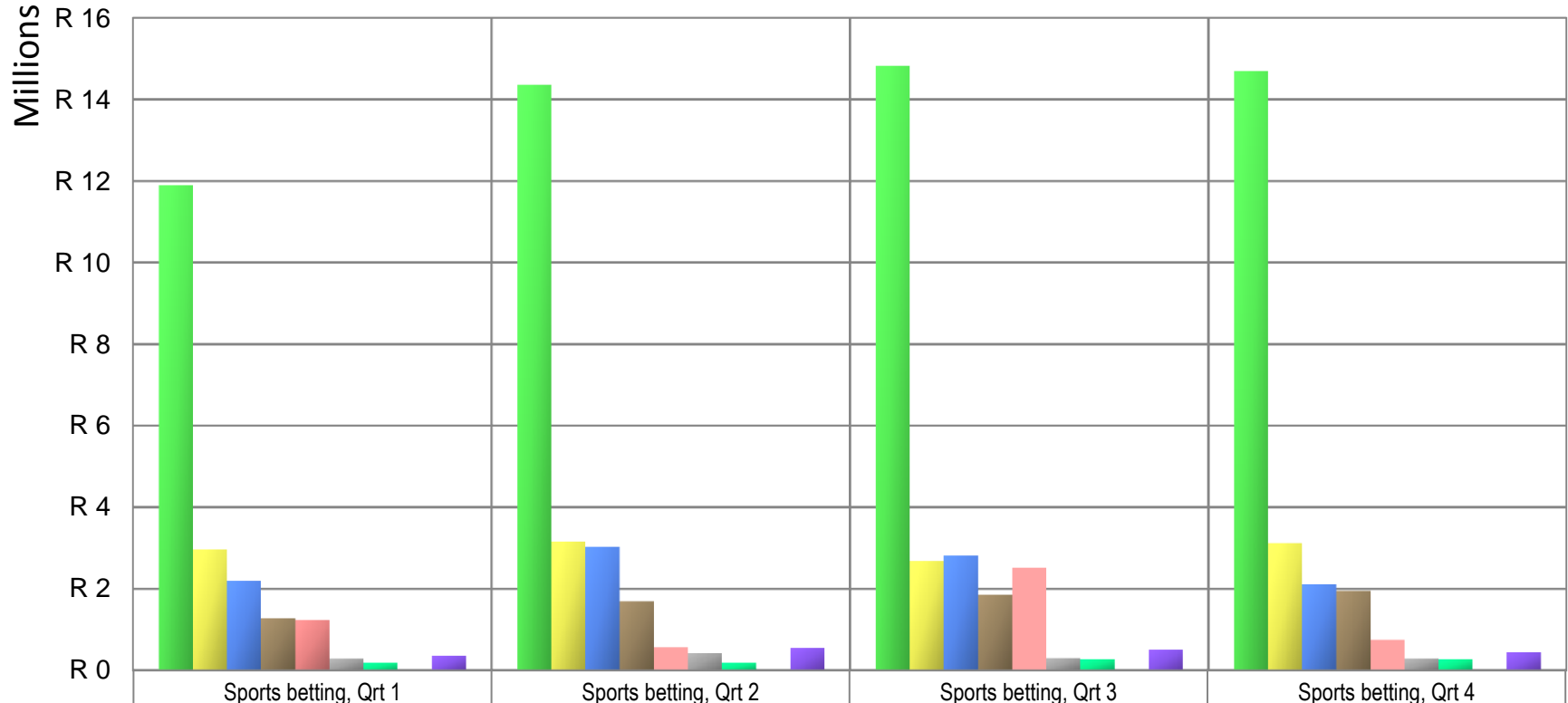


* Eastern Cape: Statistics includes sports betting

Quarterly betting taxes/levies – FY2015, Qrt 1, 2, 3 & 4

Sports betting*

Gambling tax levied and collected by PLAs



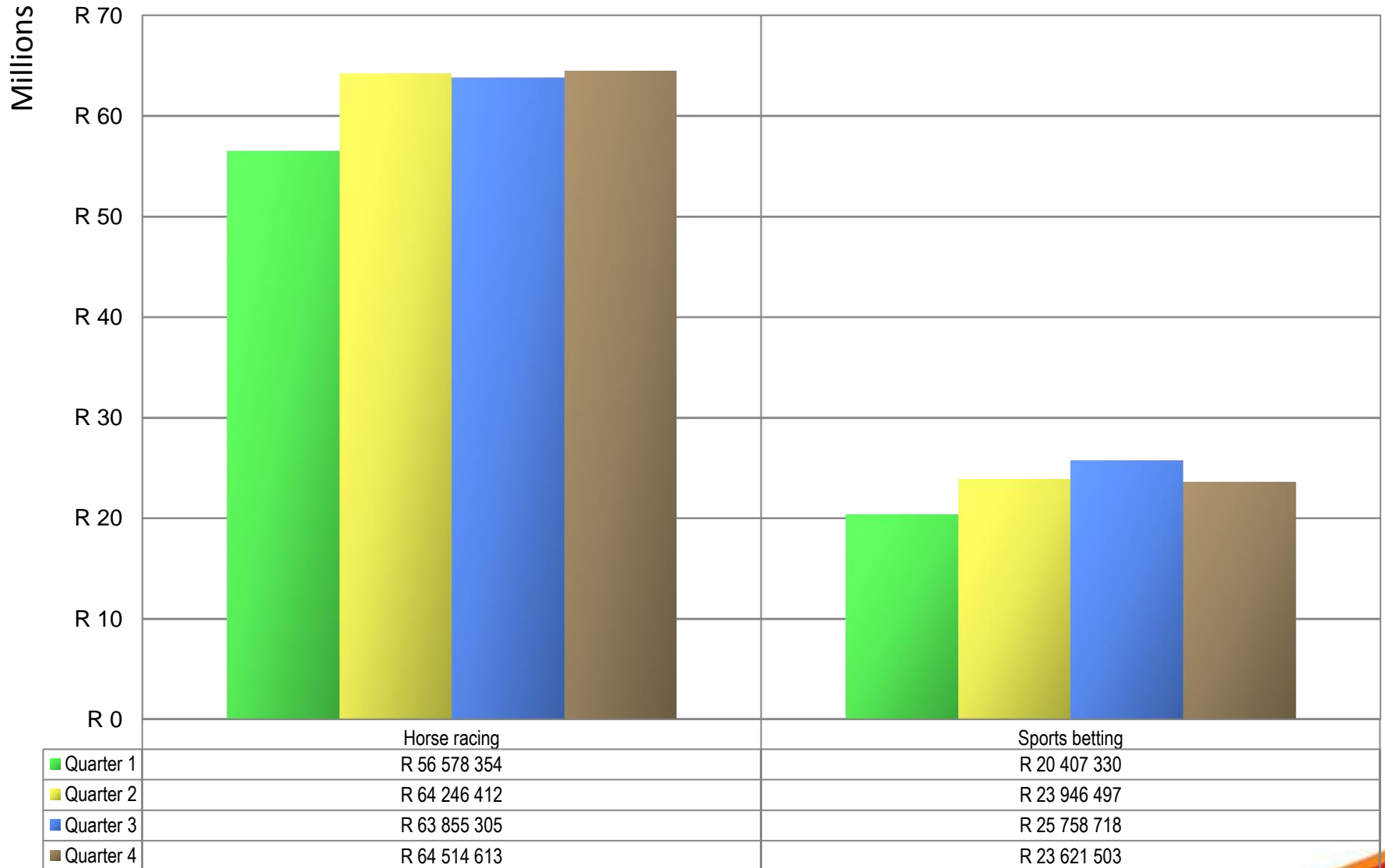
	Sports betting, Qrt 1	Sports betting, Qrt 2	Sports betting, Qrt 3	Sports betting, Qrt 4
Gauteng	R 11 899 504	R 14 362 000	R 14 818 377	R 14 699 758
Western Cape	R 2 965 783	R 3 155 946	R 2 679 136	R 3 123 737
KwaZulu-Natal	R 2 188 555	R 3 029 549	R 2 810 208	R 2 106 670
Mpumalanga	R 1 284 276	R 1 693 105	R 1 852 049	R 1 949 891
Limpopo*	R 1 242 186	R 562 943	R 2 523 063	R 751 678
North West	R 285 160	R 419 526	R 303 479	R 285 531
Northern Cape	R 187 431	R 179 608	R 266 124	R 266 162
Eastern Cape				
Free State	R 354 436	R 543 821	R 506 282	R 438 076

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

Quarterly betting taxes/levies – FY2015, Qrt 1, 2, 3 & 4

Split between Horse racing & Sports betting

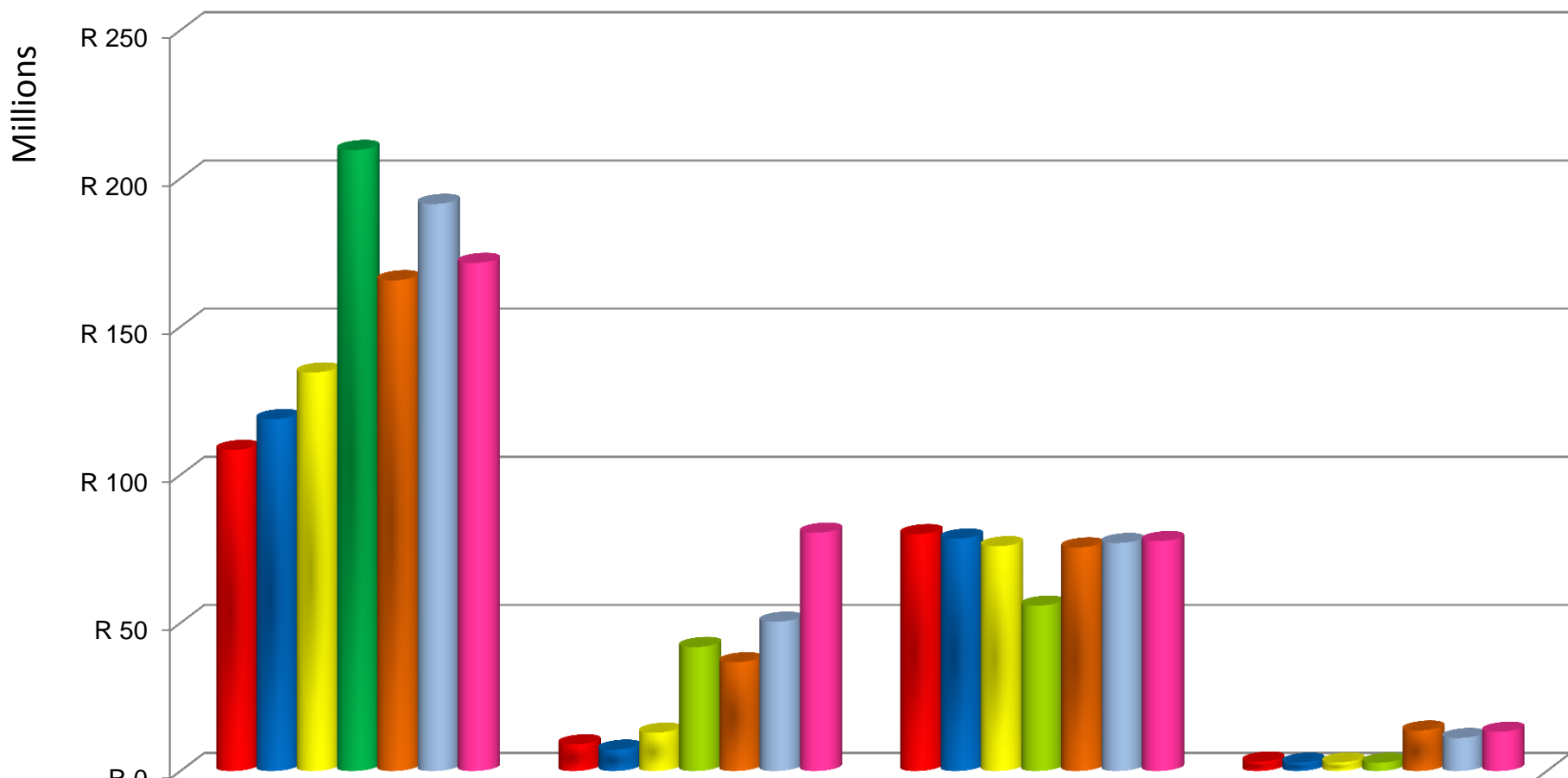
Gambling tax levied and collected by PLAs



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

Trend in taxes/levies, bookmakers & totalisators, FY09 to FY15

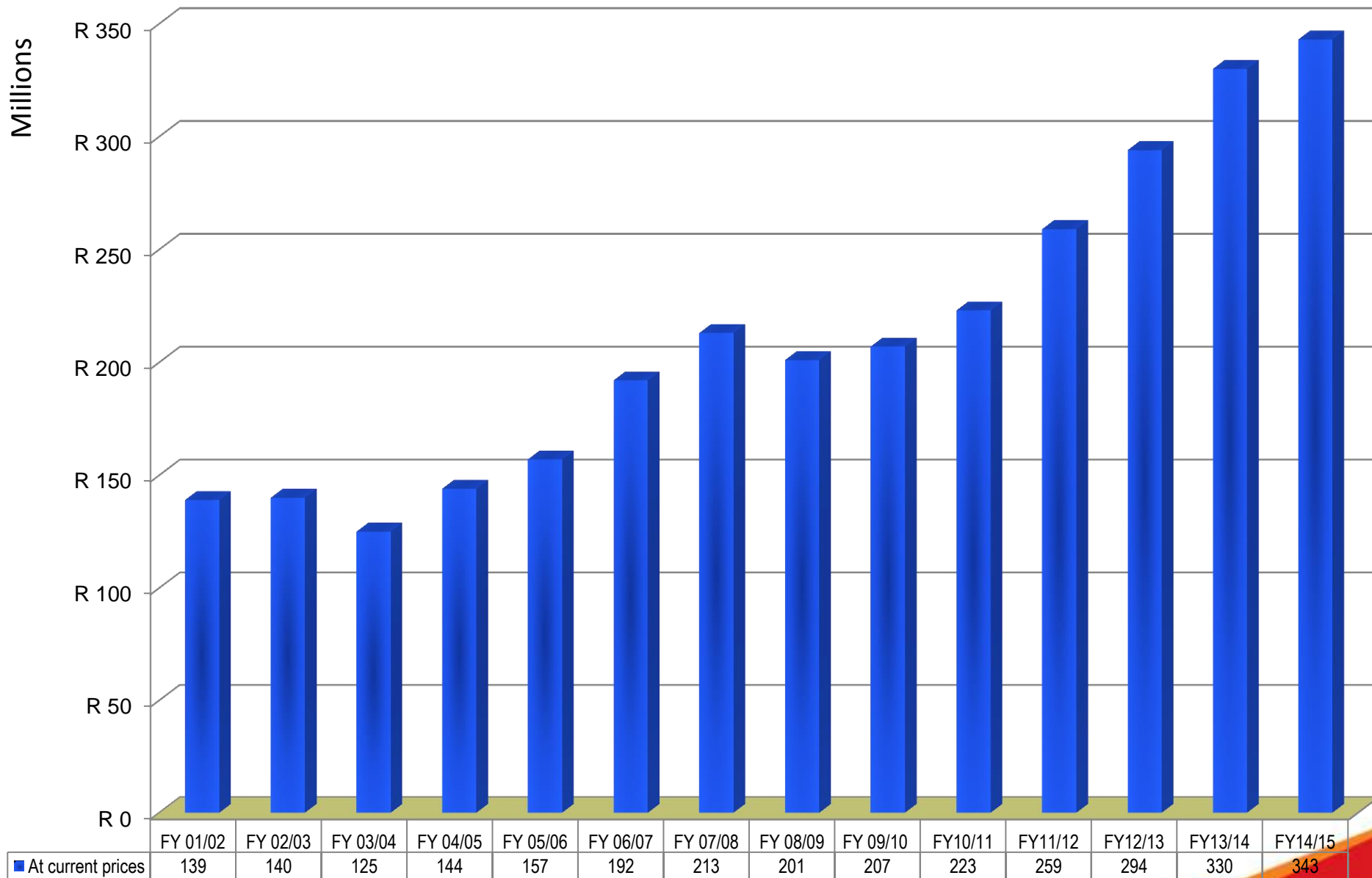
Gambling tax levied and collected by PLAs



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
FY 09	R 108 445 374	R 9 025 098	R 80 004 211	R 3 180 489
FY 10	R 118 841 545	R 7 221 350	R 78 488 632	R 2 811 626
FY 11	R 134 575 958	R 12 953 552	R 75 922 407	R 2 923 298
FY 12	R 209 605 256	R 41 900 245	R 55 833 557	R 2 803 829
FY 13	R 165 681 993	R 36 730 060	R 75 524 452	R 13 654 952
FY 14	R 191 426 209	R 50 436 312	R 77 014 901	R 11 153 955
FY 15	R 171 539 696	R 80 477 317	R 77 654 988	R 13 256 731

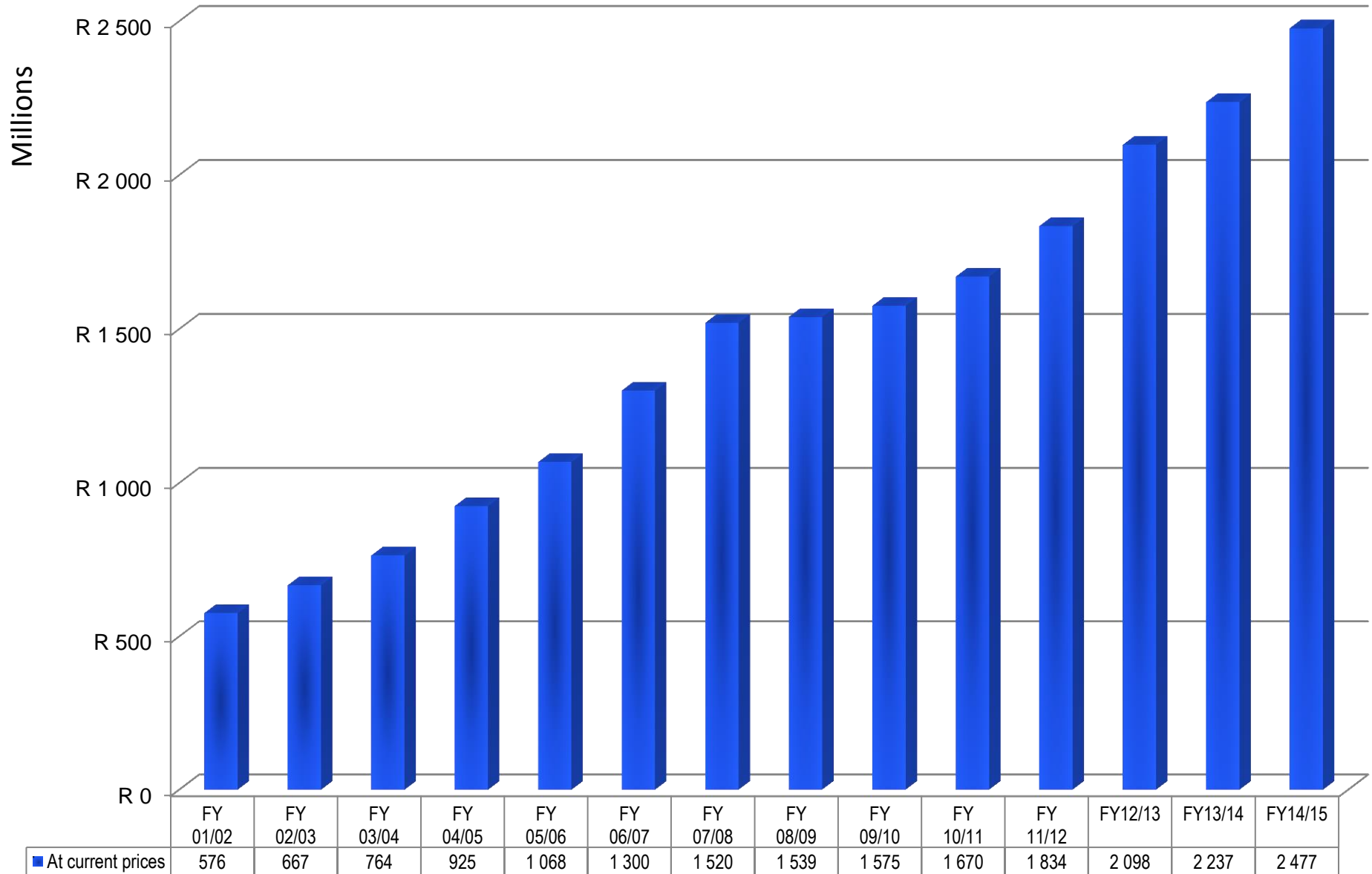
Trend in betting taxes/levies – FY01/02 to FY15

Gambling tax levied and collected by PLAs



Trend in Taxes/Levies – FY01/02 to FY15 (all modes and provinces)

Gambling tax levied and collected by PLAs

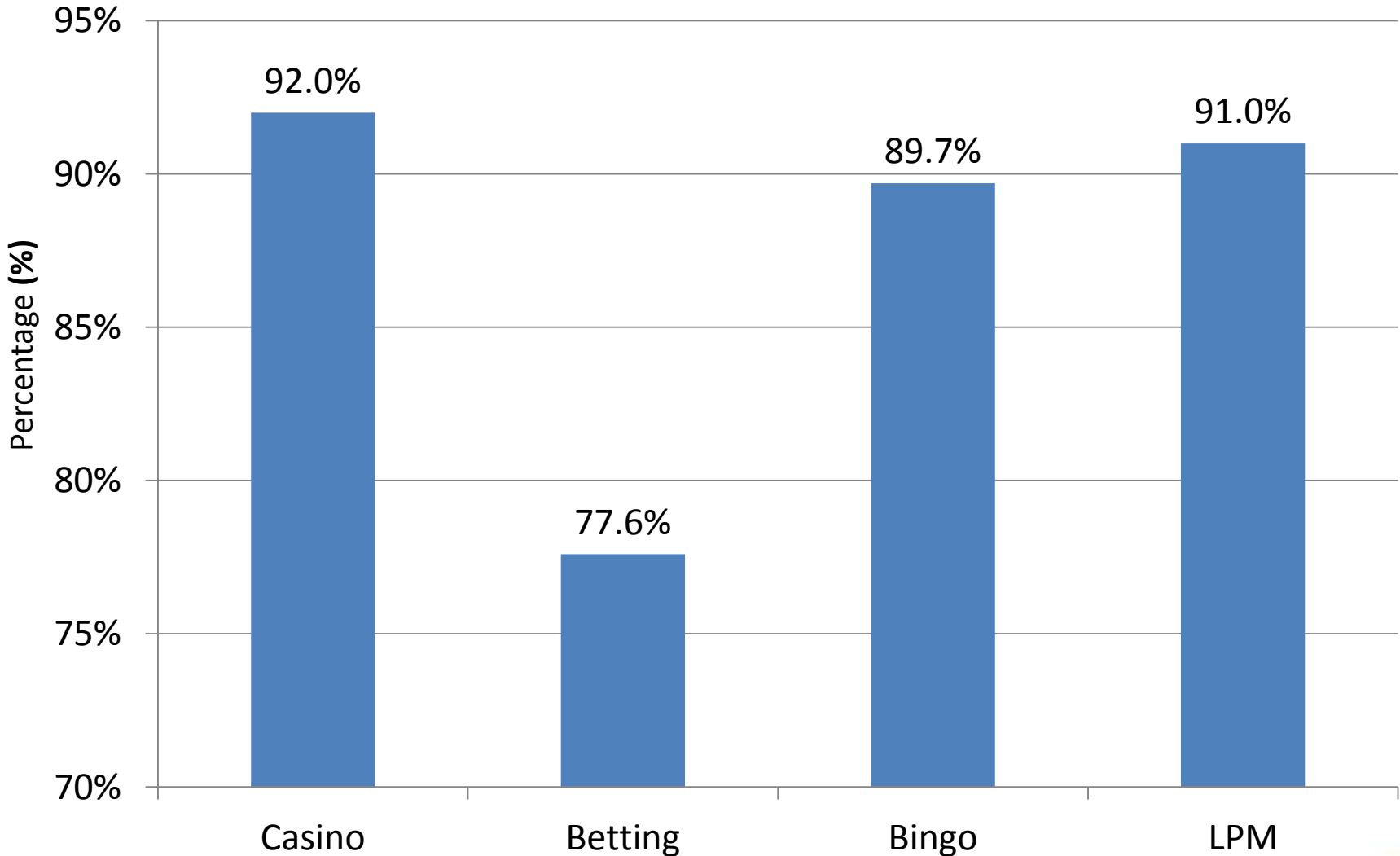


Summary : Taxes/levies

- ❑ Taxes/levies increased by 14.4% from R1,8 billion in FY12, to R2,1 billion in FY13, by 6.6% to R2,2 billion in FY14, and by 10.7% to R2,5 billion in FY15.
- ❑ A total amount of R 2 476 683 639 in taxes/levies was collected during FY15.
- ❑ During FY15, at 72.3%, casinos contributed the highest amount of taxes/levies paid by comparison with other gambling modes.
- ❑ At 37.9% Gauteng accounts for the highest amount of taxes/levies paid compared to all other provinces.

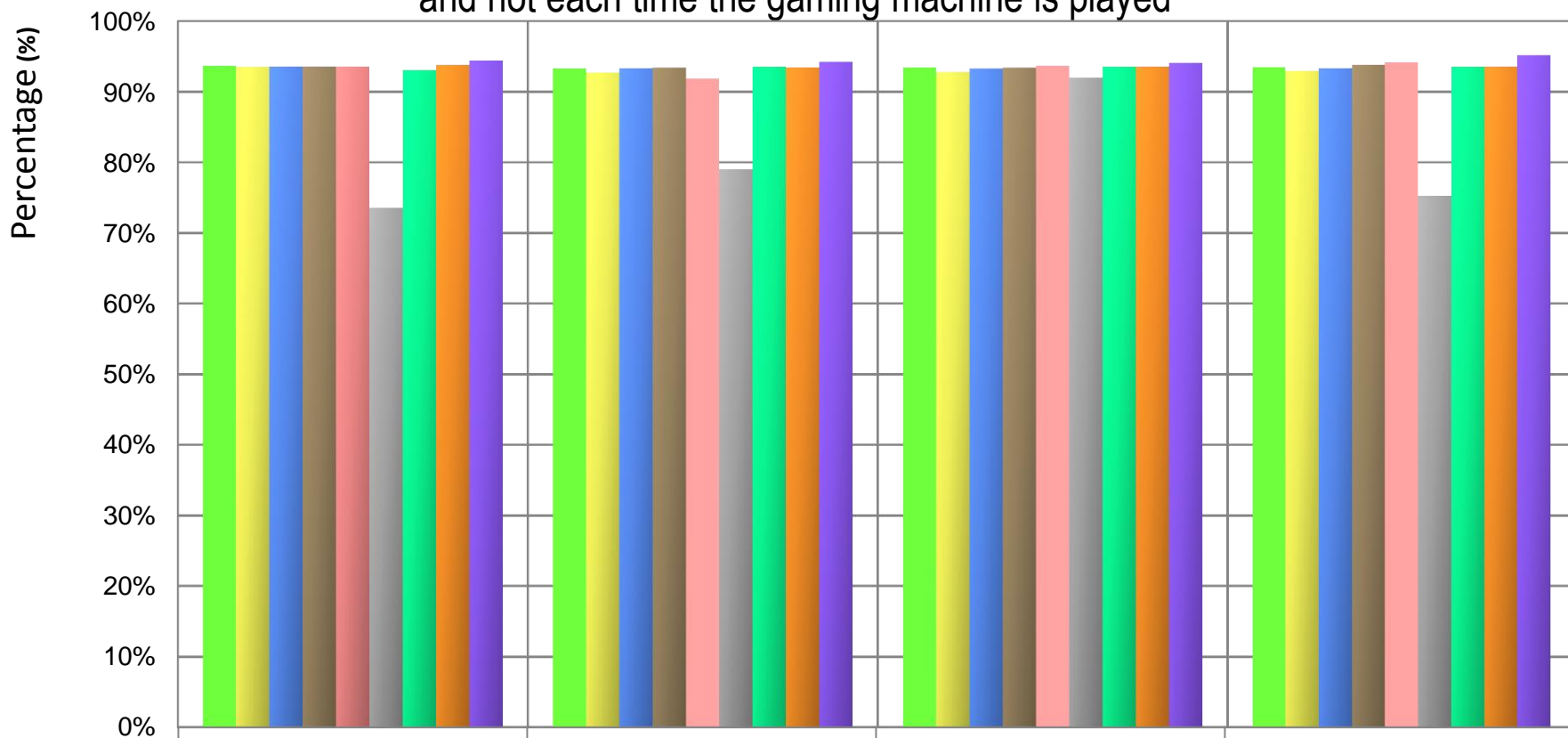
Average RTP % per gambling mode – FY2015, Qrt 1, 2, 3 & 4)

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 % - FY2015, Qrt 1, 2, 3 & 4

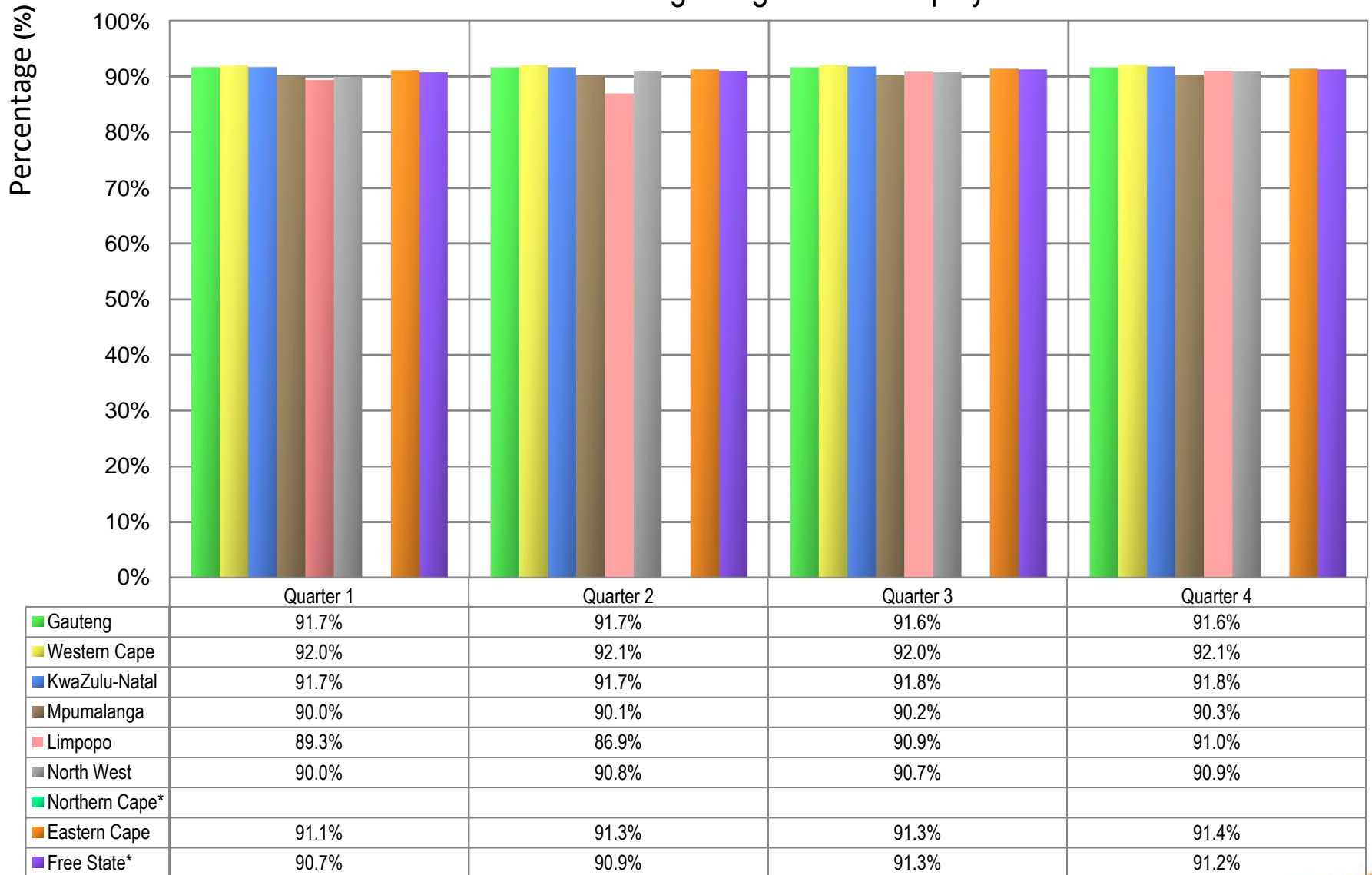
Return to Player is an average achieved over a significant number of game plays*
and not each time the gaming machine is played



	Quarter 1	Quarter 2	Quarter 3	Quarter 4
■ Gauteng	93.7%	93.3%	93.4%	93.5%
■ Western Cape	93.6%	92.8%	92.8%	93.0%
■ KwaZulu-Natal	93.6%	93.4%	93.3%	93.3%
■ Mpumalanga	93.6%	93.4%	93.4%	93.8%
■ Limpopo	93.6%	91.9%	93.7%	94.2%
■ North West	73.6%	79.0%	92.0%	75.3%
■ Northern Cape	93.1%	93.5%	93.5%	93.6%
■ Eastern Cape	93.8%	93.4%	93.6%	93.6%
■ Free State	94.4%	94.2%	94.1%	95.2%

Quarterly LPM RTP % - FY2015, Qrt 1, 2, 3 & 4*

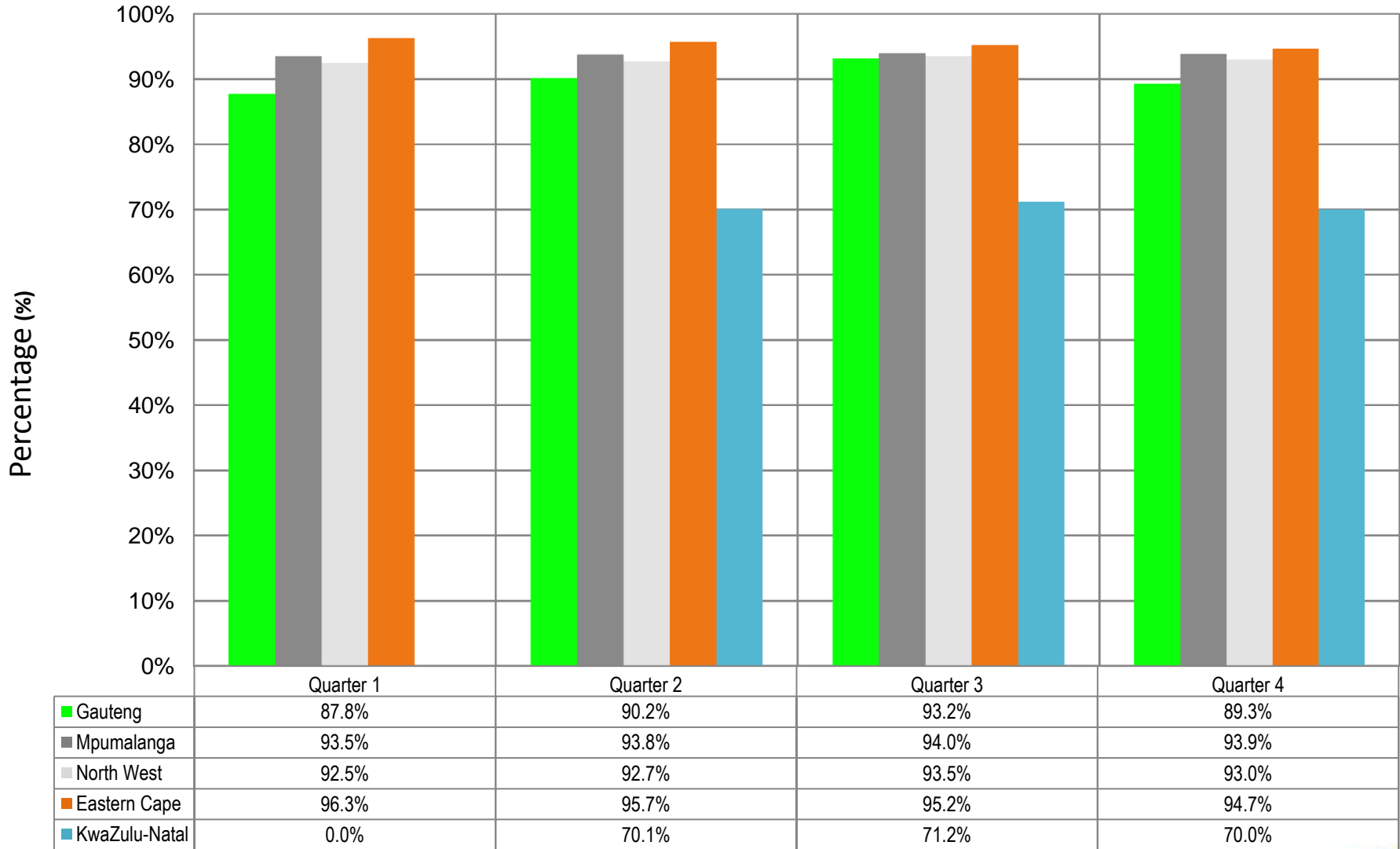
Return to Player is an average achieved over a significant number of game plays*
and not each time the gaming machine is played



* LPMs not yet rolled out in Northern Cape

Quarterly bingo RTP % - FY2015, Qrt 1, 2, 3 & 4*

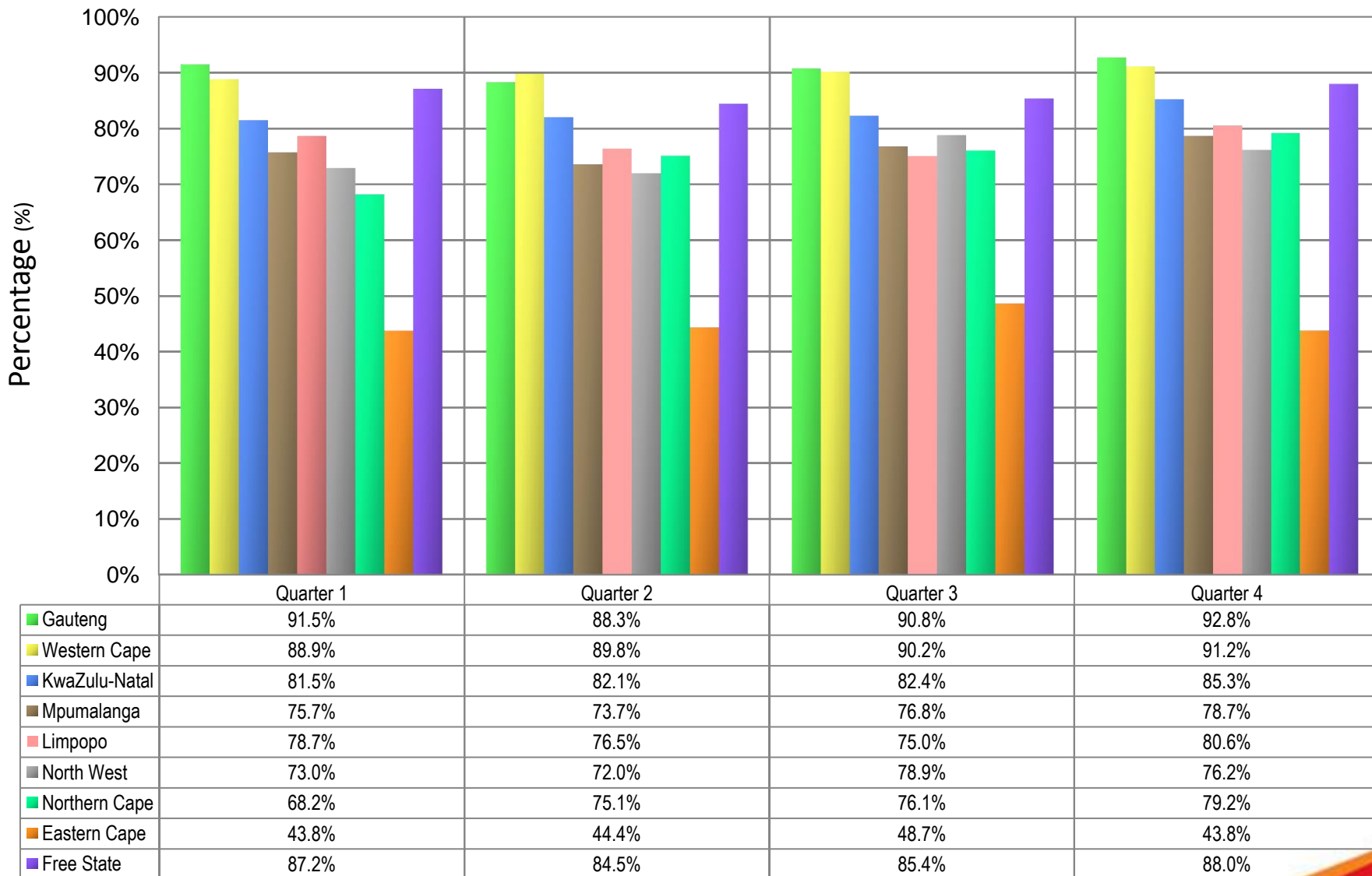
Return to Player is an average achieved over a significant number of game plays*
and not each time the gaming machine is played



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

Quarterly betting RTP % - FY2015, Qrt 1, 2, 3 & 4

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



Conclusion

- ❑ Overall, growth in the casino industry is still limited despite the roll out of a new casino in Northern Cape (37 casinos operational out of 40 licenses as at 31 March 2015).
- ❑ Based on statistics monitored during FY15, further growth in the betting on sport sector (especially offered by bookmakers), bingo and LPM sectors is expected.

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National Gambling Board

South Africa

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