NGB

National Gambling Board

South Africa

a member of the dti group

GAMBLING SECTOR PERFORMANCE IN SOUTH AFRICA

SUMMARY

CONTENTS

Foreword by the
Accounting Authority

Ms Caroline Kongwa

One of the key responsibilities of the National Gambling Board (NGB), as mandated by the National Gambling Act (NGA), 2004 (Act 7 of 2004), Section 65(2)(e), is to monitor market conduct and market share in the South African gambling industry. In doing so, the NGB gathers national gambling statistics and information related to market conduct and market share from all Provincial Licensing Authorities (PLAs). This enables the NGB to publish audited statistics annually on its website to keep its stakeholders and the public informed about turnover, the generation of Gross Gambling Revenue (GGR) and the collection of taxes/levies.

Further to this, the collection of detailed information per gambling operator, province and mode enables the NGB to map the size and nature of the South African gambling industry, as well as to monitor trends and growth in the various gambling sectors. The NGB has successfully managed to compile comprehensive reports since FY2012 on the status and growth of the gambling industry, as well as share the latest trends with its external stakeholders and the public.

The NGB has pleasure in sharing the latest trends related to gambling sector performance and especially national gambling statistics and market conduct information as at the end of Financial Year (FY) 2019/20 (1 April 2019 to 31 March 2020). We trust that our stakeholders and the public will find the content informative, useful and beneficial. The NGB would also like to extend its gratitude to all PLAs for submitting information and statistics as required, without which this report would not have been possible.

ACKNOWLEDGEMENTS

All Provincial Licensing Authorities (PLAs) are acknowledged for submitting audited information related to market conduct, market share and provincial gambling statistics per gambling mode, operator and province.

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CONTRIBUTORS

The following PLAs contributed to the compilation of this report by submitting audited provincial gambling statistics and information about market conduct:

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

ACRONYMS

B-BBEE	Broad-Based Black Economic Empowerment
EBT	Electronic Bingo Terminal
EC	Eastern Cape
FS	Free State
FY	Financial Year
GGR	Gross Gambling Revenue
GT	Gauteng
KZN	KwaZulu-Natal
L	Limpopo
LPM	Limited Payout Machines
MP	Mpumalanga
N/A	Not Applicable
NC	Northern Cape
NCEMS	National Central Electronic Monitoring System
NGA	National Gambling Act, 2004 (Act 7 of 2004)
NGB	National Gambling Board
NW	North West
PLAs	Provincial Licensing Authorities
Qrt	Quarter
the dti	The Department of Trade and Industry
TO	Turnover
WC	Western Cape

EXPLANATORY NOTES

Term	Explanation
Broad-Based Black Economic Empowerment (B-BBEE)	Broad-Based Black Economic Empowerment is the sustainable economic empowerment of all Black people, in particular women, workers, youth, people with disabilities and people living in rural areas, through diverse but integrated strategies, but not limited to a) increasing the number of Black people who manage, own and control enterprises and productive assets, b) facilitating ownership and management of enterprises and productive assets by communities, workers, co-operatives and other collective enterprises, c) human resource and skills development, d) achieving equitable representation in all occupational categories and levels in the workforce, e) preferential procurement including the promotion of local content procurement, and f) investment in enterprises that are owned or managed by Black people.
Bingo	Bingo means a game played in whole or in part by electronic means that is played using cards or other devices; that are divided into spaces each of which bears a different number, picture or symbol; and which are arranged randomly such that each card or similar device contains a unique set of numbers, pictures or symbols; in which an operator calls or displays a series of numbers, pictures or symbols in random order and the players match each such number, picture or symbol on the card or device as it is called or displayed; and the player who is first to match all the spaces on the card or device, or who matches a specified set of numbers, pictures or symbols on the card or device, wins a prize.
Bookmaker	A bookmaker, bookie or turf accountant is a person or organisation that takes bets on various events or contingencies such as horse racing, football, rugby union or marriages, births, names, divorces and even in extreme cases deaths etc. at agreed upon odds (fixed odds). A bookmaker may be licensed to operate on or off-course, that is at licensed premises, other than a race course.
Casino	A casino is a facility which is licensed to house and accommodate certain types of licensed casino style slots and Table gambling games.
Employment (direct)	Key (licensed) and other gaming (licensed) employees.
Gambling machine/ slot machine used interchangeably	A slot machine, informally known as a fruit machine, is a casino gambling machine with three or more reels which spin when a button is pushed or a handle is pulled (older mechanical types). These slot machines are also known as one-armed bandits because of the one lever on the side of the machine (the arm) and because of their ability to leave the gamer penniless (bandit). The machine pays off based on patterns of symbols visible on the front of the machine when it stops. Slot machines are the most popular gambling method in casinos and constitute about 80 per cent of the average casino's income.
Gross Gambling Revenue (GGR)	Gross gambling revenue is defined as the Rand value of the gross revenue of an operator in terms of turnover less winnings paid to players.
Horse racing	Horse racing is the sport in which horses and their riders take part in races, typically with substantial betting on the outcome.
Licenced (all modes and outlets)	Licensed is when a person or company is in possession of a valid licence, registration card or certificate allowing him/them to offer approved gambling activities within licensed premises to over 18 year old persons.

Term	Explanation
Limited Payout Machine (LPM)	Limited payout machine means a gambling machine outside of a casino in respect of the playing of which the stakes and prizes are limited.
Route Operator (RO)	Route operator is a juristic person which is licensed to own and operate limited payout machines, maintain and effect the collection of money and paying of taxes and levies in respect of all machines under its licence.
Site Operator (SO)	Site operator is a natural or juristic person licensed to manage limited payout machines owned by a route operator on his licensed premises (also known as a site) and to make them available to be played by members of the public.
Table game	In casinos, the term Table game is used to distinguish games such as blackjack, craps, roulette and baccarat that are played on a Table and operated by one or more live dealers like a croupier or poker dealer.
Taxes/levies	Gambling tax levied by and collected by provincial licensing authorities.
Totalisator/ Pari-Mutuel betting used interchangeably	Totalisator is the name for the automated pool betting system which runs pari-mutuel betting, calculating payoff odds, displaying them, and producing tickets based on incoming bets. Parimutuel betting is a betting system in which all bets of a particular type are placed together in a pool; taxes and the “house-take” are removed, and payoff odds are calculated by sharing the net pool among all winning bets.
Turnover (TO)	Turnover is the rand value of money wagered. This includes “recycling” which refers to amounts that are staked on more than one occasion). “TO” in the fixed odds/bookmaking environment is, however, different from other forms of gambling in that the amount of money crossing the Table is NOT seen as turnover, because the amount of money staked / wagered / bet on an event is returned to the player should the player win the wager / bet, so a true description of turnover in fixed odds/bookmaking parlance is money wagered minus the stakes wagered on winnings bets = fixed odds/bookmaking turnover.

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EXECUTIVE SUMMARY

The National Gambling Board (NGB) is mandated by the National Gambling Act (NGA), 2004 (Act 7 of 2004), Section 65(2)(e) to monitor market conduct and market share relative to gambling at casinos, betting on horse racing and sport, Limited Payout Machines (LPMs) and bingo. The following key trends were reflected relevant to Financial Year (FY) 2019/20 based on audited information.

Gross gambling revenue generated by the industry in FY2019/20 amounted to R32.7 billion, of which 10% were taxes and levies collected out of it, amounting to R3.2 billion. Although total gambling revenue is largely made up of casino sector revenue (R18.4 billion in FY2019/20), there was negative growth (-1.3%) in revenue in this sector between FY2018/19 and FY2019/20. This was due to a fall in the number of operational casino gambling positions over the same period.

Although part of this is attributable to the effects of the nationwide lockdown at the end of March 2020 due to the Covid-29 pandemic, the share of casino gambling revenue in total gambling revenue has been declining for almost a decade, indicative of saturation within the casino sector. The sector however remains the largest generator of gambling revenue in all provinces in FY2019/20. All other gambling modes showed increases in the growth of GGR. The betting sector was the second largest generator of gambling revenue between FY2018/19 and FY2019/20 and had the highest growth amongst the gambling modes between the two periods of 21.3%. This was followed by the Bingo sector growing by 14.6% from the previous financial year and lastly the LPM sector growing by 9.9%.

The economic impact on the gambling industry of the COVID-19 pandemic is expected to be exacerbated by the current constrained economic environment where negative GDP growth rate was experienced in quarter four of the FY2019/20. The negative economic outlook, as well as the effects of the COVID-19 outbreak are likely to affect the performance and growth of the South African gambling industry going forward. This is by way of constrained incomes of households due to negative GDP growth leading to slowdown in gambling activity, gambling revenue losses due to the closing down of operations during COVID-19 nationwide lockdown, reduced government tax revenues collected from the gambling industry and potential employment losses as gambling operators struggle to rebound to pre-COVID-19 revenue generation levels.

As such, although the sector has maintained a positive growth trajectory with gross gambling revenues continuously rising annually, albeit the decreasing share of the industry's major contributor, the casino sector, average growth of the industry is expected to be lower in FY2020/21 due to emerging issues exacerbated by the global pandemic.

SNAP SHOT OF THE GAMBLING INDUSTRY FY2018/19 & FY2019/20

Variable	FY2018/19 Market conduct – as at Quarter 4 Statistics – Total all Quarters	FY2019/20 Market conduct – as at Quarter 4 Statistics – Total all Quarters	FY2019/20 Quarter 1	FY2019/20 Quarter 2	FY2019/20 Quarter 3	FY2019/20 Quarter 4
Number of operational casinos	39	39	39	39	39	39
Number of operational slots (casinos)	24 781	24 469	24 612	24 617	24 373	24 469
Number of operational table (casinos)	932	935	942	942	940	935
Number of operational gambling positions (casinos)	35 768	30 515	31 020	31 021	30 417	30 515
Number of operational totalisator outlets	388	367	385	478	326	368
Number of operational bookmakers	295	255	299	300	313	255
Number of operational bookmaker outlets	602	550	578	583	548	550
Number of operational Limited Payout Machine (LPM) site operators	2 347	2 497	2 390	2 372	2 424	2 498
Number of active LPMs	13 034	14 130	13 609	13 314	14 018	14 140
Number of operational bingo outlets	52	56	55	56	56	56
Number of operational bingo positions	8 610	9 427	8844	9 165	9 423	9 427
Traditional	1 219	1 324	1 271	1 324	1 324	1 324
Electronic Bingo Terminals	7 391	8 103	7 573	7 841	8 099	8 103
National gambling statistics: Turnover	R 425 598 013 152	R451 922 940 905	R108 863 633 017	R115 942 839 921	R115 323 088 514	R111 793 379 453
National gambling statistics: GGR	R 30 790 766 660	R32 651 969 283	R7 651 141 979	R8 289 962 104	R8 603 545 919	R8 107 319 281
National gambling statistics: Taxes/ levies collected	R 3 094 798 852	R3 208 768 506	R763 618 764	R815 818 371	R848 676 649	R780 654 721

MAXIMUM LICENSES PER GAMBLING MODE PER PROVINCE AS AS 31 MARCH 2020

MAXIMUM NUMBER OF LICENCES	Eastern Cape	Free State	Gauteng	KZN	Limpopo	Mpuma-langa	North West	Northern Cape	Western Cape
Maximum number of casino licenses	5	4	7	5	3	4	4 active 1 pending	3	5
Maximum number of route operator licences	2	2	5	4	No set maximum number	Unlimited	No set maximum number	2	2 Unlimited
Maximum number of bookmaker licenses	Unlimited	No set maximum number	131	48	No set maximum number	Unlimited, subject to sufficient market demand and operational viability	No set maximum number	17	43 Unlimited
Maximum number of totalisator licenses	Unlimited	No set maximum number	1	2	No set maximum number	Unlimited, subject to sufficient market demand and operational viability	No set maximum number	2	1 Unlimited
Maximum number of bingo licenses	15	No Bingo License	11	22	No set maximum number	Unlimited, subject to sufficient market demand and operational viability	9	0	No roll out currently Unlimited

CHAPTER 1:

INTRODUCTION

1.1 The National Gambling Board (NGB) is mandated by the National Gambling Act (NGA), 2004 (Act 7 of 2004), Section 65(2)(e) to monitor market conduct and market share in the South African gambling industry.

1.2 NGB monitors market conduct (e.g. number of operators, gambling positions and outlets in the South African gambling sector), and also gathers and analyses national gambling statistics in terms of turnover (TO), GGR and the collection of taxes/levies. The NGB website is updated with a detailed Power Point presentation annually, which is based on unaudited or raw information.

1.3 The scope of this report covers information (market conduct and 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 FY2019/20 and trends over time:

1.3.1 Casinos (tables and slots)

1.3.2 Betting on horse racing and sport (offered by bookmakers and totalisators, on and off course)

1.3.3 Limited payout machines (LPMs)

1.3.4 Bingo (traditional and EBTs)

1.4 Quarterly statistics were sourced from Provincial Licensing Authorities (PLAs). FY2019/20 (Quarter 1, 2, 3 & 4) information in this report is based on unaudited or raw data.

1.5 The NGB cannot be held responsible for the correctness of information (refer to the disclaimer).

1.6 The information in this report is mainly applicable to the period of 1 April 2019 to 31 March 2020 (referred to as FY2019/20), whereas quarters are representative of the following specific periods:

1.6.1 Quarters 1: 1 April 2019 – 30 June 2019

1.6.2 Quarters 2: 1 July 2019 – 30 September 2019

1.6.3 Quarters 3: 1 October 2019 – 31 December 2019

1.6.4 Quarters 4: 1 January 2020 – 31 March 2020

1.7 The purpose of this report is to report on the status and performance of the South African gambling sector (excluding the National Lottery) in terms of market conduct and national gambling statistics (1 April 2019 to 31 March 2020), as well as trends over time.

CHAPTER 2:

NATIONAL GAMBLING STATISTICS

2.1 INTRODUCTION

2.1.1 The purpose of this section is to provide an overview of national gambling statistics (per gambling mode and province) based on provincial gambling statistics submitted by all PLAs during the reporting periods as indicated.

2.2 TURNOVER PER GAMBLING MODE AND PROVINCE, FY2019/20

2.2.1 The end of the FY2019/20 saw the government declare the outbreak of coronavirus a national state of disaster and impose a national lockdown from midnight on 26 March 2020 in terms of the National Disaster Management Act, 2002 (Act 57 of 2002), which resulted in a complete shutdown of the land based gambling industry. All landbased gambling activities were suspended in what was seen as unprecedented, which saw the industry slightly slow down towards the end of the financial year and turnover, GGR and Taxes tumble even further in the new financial year.

2.2.2 A total amount of R451 922 940 905 was wagered in FY2019/20. Casinos accounted for the highest TO at 64.7% by comparison with all other gambling modes in FY2019/20. Gauteng accounted for the highest amount of TO in respect of all gambling modes, the total percentage being 42% as compared to other provinces. Although Gauteng represented the highest amount of turnover relative to casinos (45.3%), betting on horse racing and sport (50.1%), and bingo (36.5%), the highest amount of money in the LPM sector was wagered in Western Cape (26.6%).

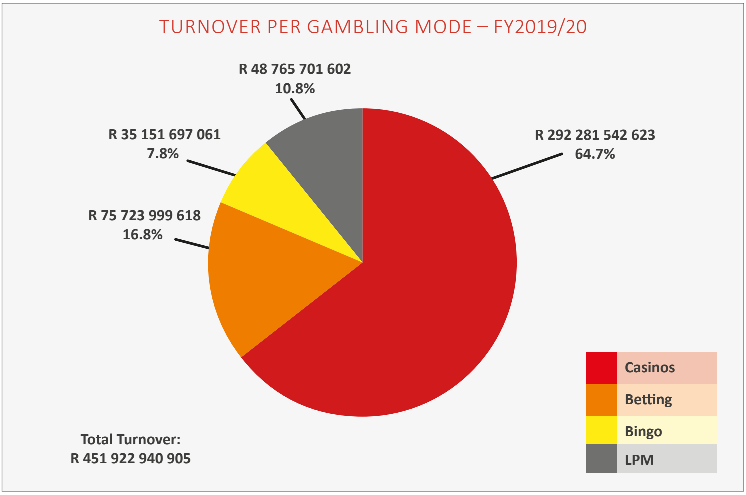


Figure 1: Turnover per gambling mode, all provinces, FY2019/20

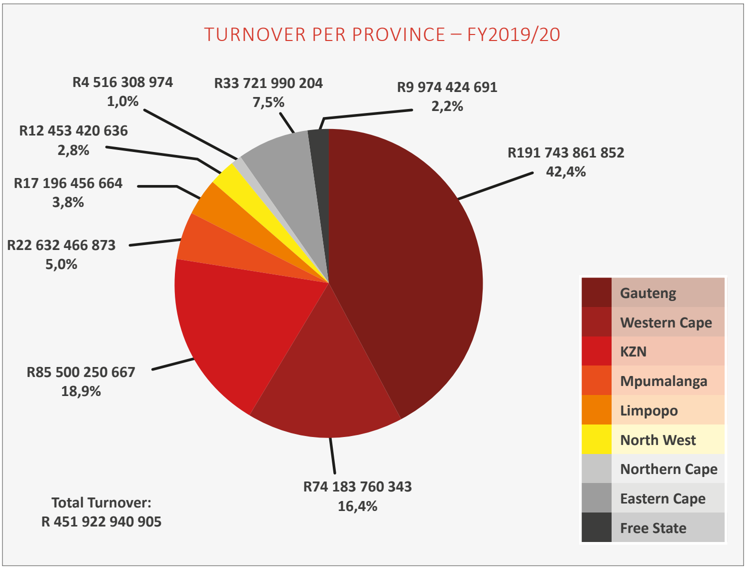


Figure 2: Turnover per province, all modes, FY2019/20

2.3 GROSS GAMBLING REVENUE PER GAMBLING MODE AND PROVINCE, FY2016/17 – FY2019/20

2.3.1 GGR increased by 3.8% from R 26,0 billion in FY2015/16 to R 27,0 billion in FY2016/17, by 6.7% from FY2016/17 to R 28,8 billion in FY2017/18, and by 7.0% from FY2017/18 to R 30,8 billion in FY2018/19. GGR increased by 6.1% to R32 651 969 283 in FY2019/20. During FY2019/20, casinos accounted for the highest GGR generated, being 56.3% as compared to other gambling modes. Compared to all other provinces, Gauteng at a 40% share, accounted for the highest amount of GGR generated.

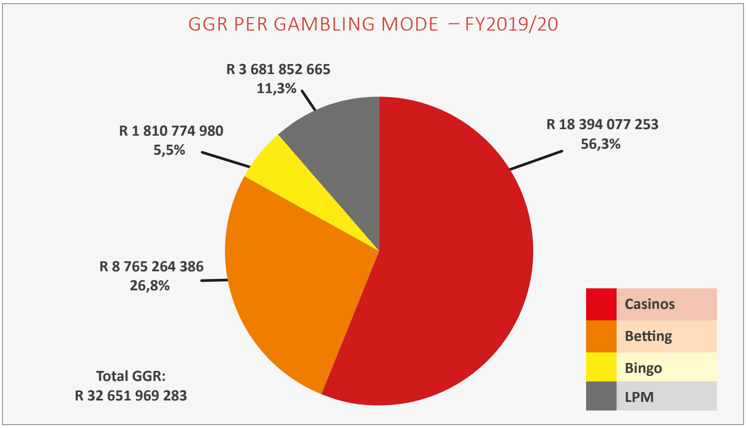


Figure 3: GGR per gambling mode, all provinces, FY2019/20

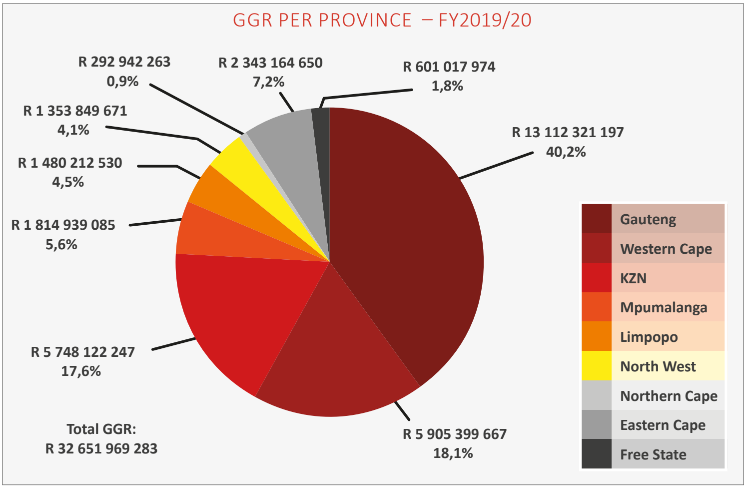


Figure 4: GGR per province, all modes, FY2019/20

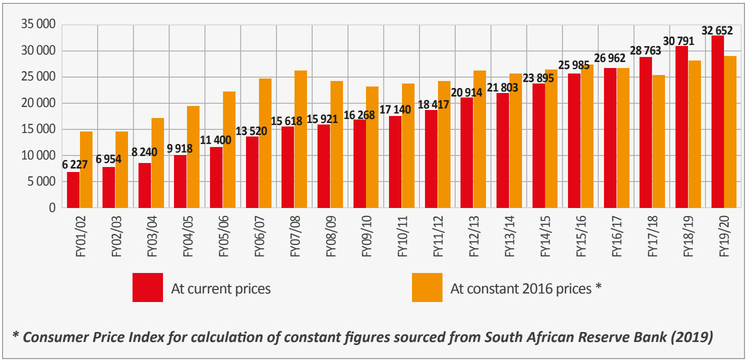


Figure 5: Trend in GGR, all modes, from FY2001/02 to FY2019/20

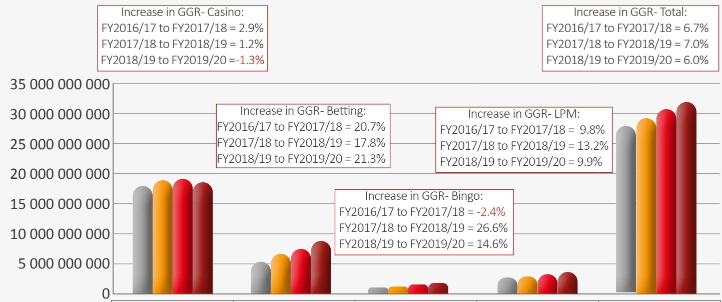
2.3.2 Analysis of GGR and gambling positions per gambling mode during the period FY2016/17 to FY2019/20 reflected the following growth and trends as shown in figures 6, 7 and 8:

a) In terms of the generation of GGR, positive growth in GGR has been recorded in all gambling modes except the casino sector, whereas the highest increase in GGR was noted in the betting sector (21.3% from FY2018/19 to FY2019/20) followed by the bingo sector 14.6% and LPM sector (by 9.9% from FY2018/19 to FY2019/20).

b) The highest growth (increase) in GGR generated per province was noted in Mpumalanga (by 22.3% from FY2018/19 to FY2019/20), followed by Western Cape (by 8.8%) and KwaZulu-Natal (by 8.5%) during the same period.

c) An increase in gamblling positions was recorded in the LPM sector and bingo sector whereas a decline in the number of operational gambling positions in casinos was noted.

GROWTH IN GGR, ALL MODES (FY2016/17 – FY2019/20)

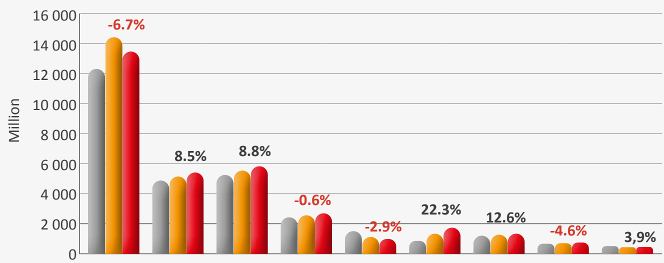


	GGR Casino	GGR Betting	GGR Bingo	GGR LPM	TOTAL
GGR, FY2016/17	17 900 747 071	5 085 630 664	1 278 664 383	2 696 846 443	26 961 888 560
GGR, FY2017/18	18 417 094 967	6 136 832 908	1 248 509 057	2 960 822 948	28 763 259 881
GGR, FY2018/19	18 632 408 686	7 227 082 554	1 580 744 888	3 350 530 532	30 790 766 660
GGR, FY2019/20	18 394 077 253	8 765 264 386	1 810 774 980	3 681 852 665	32 651 969 283

Figure 6: Growth in GGR, all modes (FY2016/17 – FY2019/20)

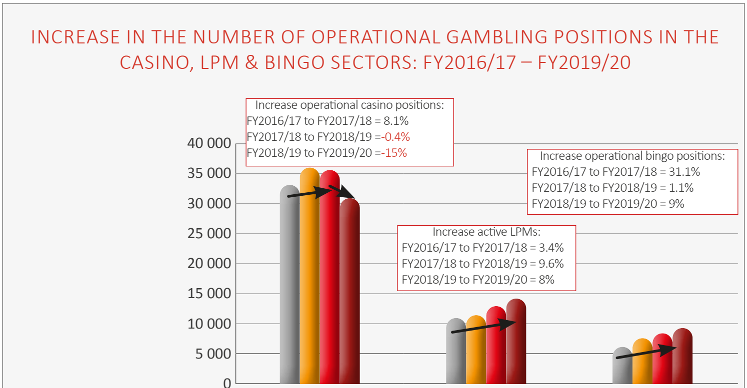
GROWTH RATE OF GGR PER PROVINCE PER PROVINCE (FY2017/18 - FY2019/20)

INCREASE IN GGR WITH SPECIFIC REFERENCE TO GROWTH BETWEEN FY2018/19 AND FY2019/20



	Gauteng	KwaZulu-Natal	Western Cape	Eastern Cape	North West	Mpumalanga	Limpopo	Free State	Northern Cape
GGR, FY2017/18	12 064	4 526	5 184	2 224	1 515	1 301	1 065	579	304
GGR, FY2018/19	14 061	5 296	5 429	2 356	1 393	1 484	1 314	630	282
GGR, FY2019/20	13 112	5 748	5 905	2 343	1 353	1 815	1 480	601	293

Figure 7: Growth rate of GGR per province (FY2017/18 – FY2019/20)



	Casino	Limited payout machines	Bingo
Operational positions, FY2016/17	33 249	11 502	6 497
Operational positions, FY2017/18	35 929	11 896	8 520
Operational positions, FY2018/19	35 768	13 034	8 610
Operational positions, FY2019/20	30 515	14 130	9 427

Figure 8: Increase in the number of gambling positions in the casino, LPM & bingo sectors: FY2015/16 – FY2019/20

2.3.3 Figure 9 illustrates that there is a decline in the share in total GGR of casinos from FY2009/10 to FY2018/19 compared to a steady increase relative to Betting, LPM and Bingo sectors which have more than doubled in this period.

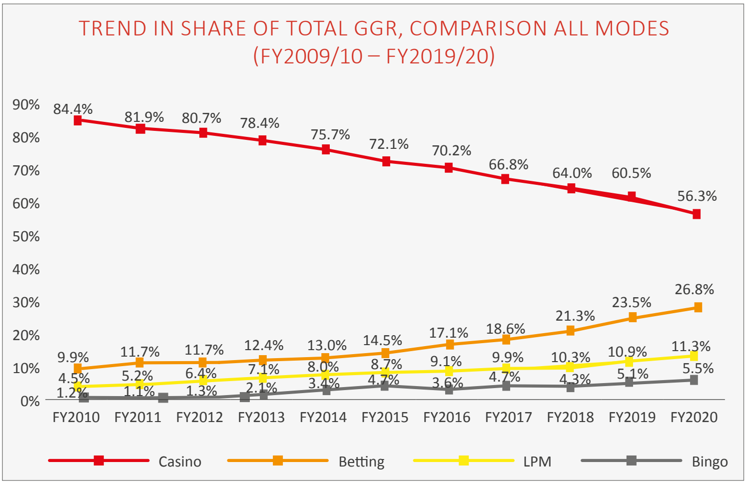


Figure 9: Trend in share of total GGR, comparison all modes (FY2009/10 – FY2019/20)

2.4 TAXES/LEVIES CONTRIBUTION PER GAMBLING MODE AND PROVINCE, FY2017/18 – FY2019/20

2.4.1 The collection of taxes/levies decreased by 1.0% from R2,8 billion in FY2015/16 to R 2,7 billion in FY2016/17, but increased by 5.7% to R 2,9 billion in FY2017/18, by 6.8% to R 3,1 billion from FY2017/18 to FY2018/19 and by 3.2% to R3 208 768 506. A total amount of R3 208 768 506 taxes/levies was collected during FY2019/20. During FY2019/20, at 58.7%, casinos contributed the highest amount of taxes/levies paid by comparison with other gambling modes. At 37.0% Gauteng accounted for the highest amount of taxes/levies paid compared to all other provinces. Taxes/levies collected per gambling mode and province are reflected on figures 10 & 11, and the trend over time is illustrated on figure 12.

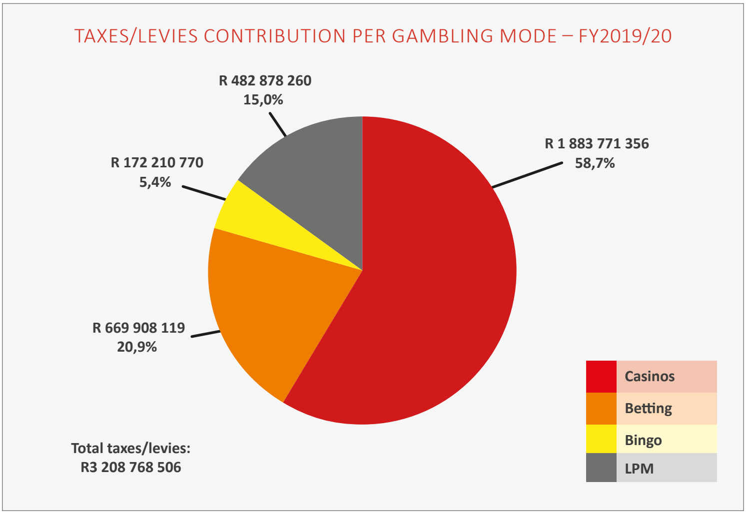


Figure 10: Taxes/levies per gambling mode, all provinces, FY2019/20

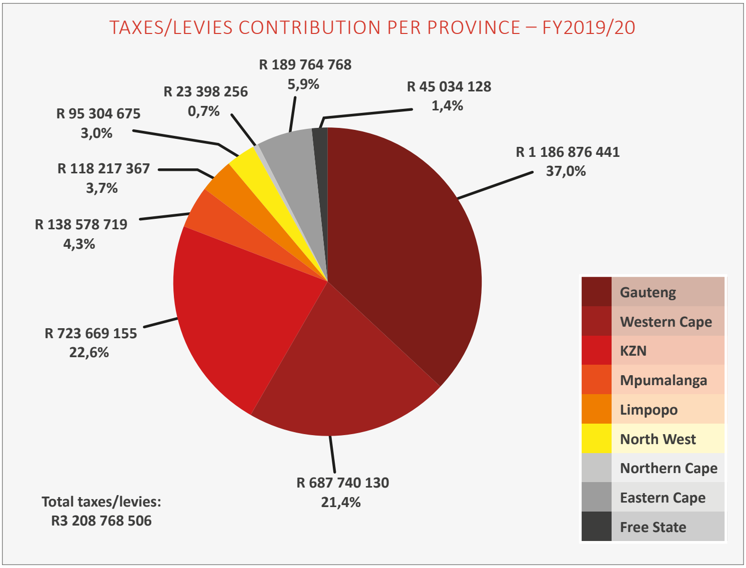


Figure 11: Taxes/levies per province, all modes, FY2019/20

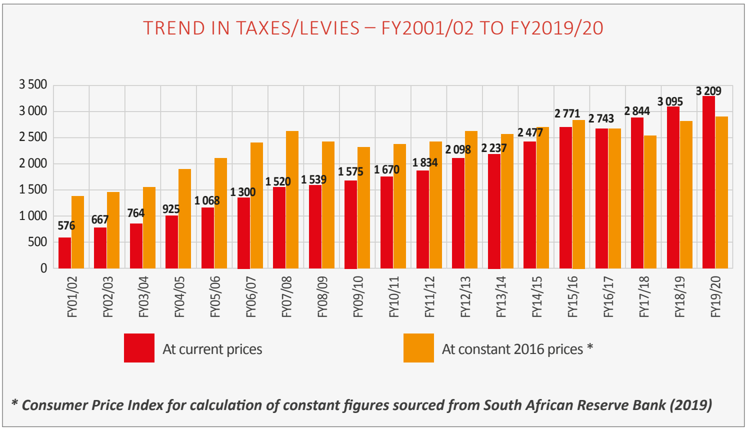


Figure 12: Trend in taxes/levies, all modes, FY2001/02 – FY2019/20

CHAPTER 3:
CASINO SECTOR

3.1 MARKET CONDUCT

3.1.1 As at 31 March 2020 a total number of 39 casinos (out of a maximum of 41 licenses) were operational in South Africa. The controlling shareholders for operational casinos are Sun International (13 casinos), Tsogo Sun Holdings/ Hosken Consolidated Investments (15 casinos), Peermont Resorts (8 casinos), London Clubs International (1 casino), Northern Cape Casino Consultants (1 casino) and Billion Group (1 casino).

3.1.2 Of the total casino market, the majority of the casinos are situated in Gauteng (7, 17.9%), compared to Western Cape, KwaZulu-Natal and Eastern Cape each hosting 5 casinos (12.8% respectively) as reflected in figure 13.

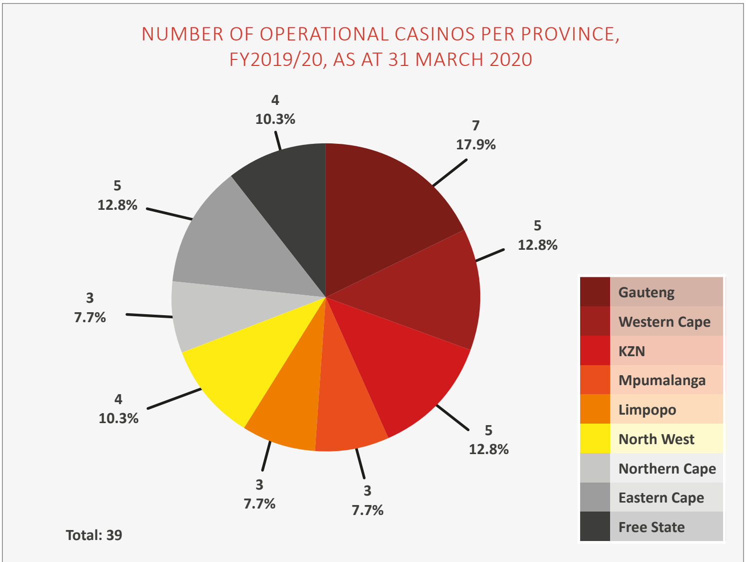


Figure 13: Number of operational casinos per province, FY2019/20, as at 31 March 2020

3.1.3 As at 31 March 2020, Gauteng accounted for the highest number of licensed operational slots in casinos (9365, 38.3%), compared to KwaZulu-Natal (4130, 16.9%) and Western Cape (3 770, 15.4%) out of the total number of 24 469. Overall an increase by 6.3% was recorded in the number of operational slots from FY2016/17 (23 697) to FY2017/18 (25 195), a decrease by 1.6% recorded from FY2017/18 to FY2018/19 (24 781) and a further decrease was recorded from FY2018/19 (24 781) to (24 469) FY2019/20 as at 31 March 2020.

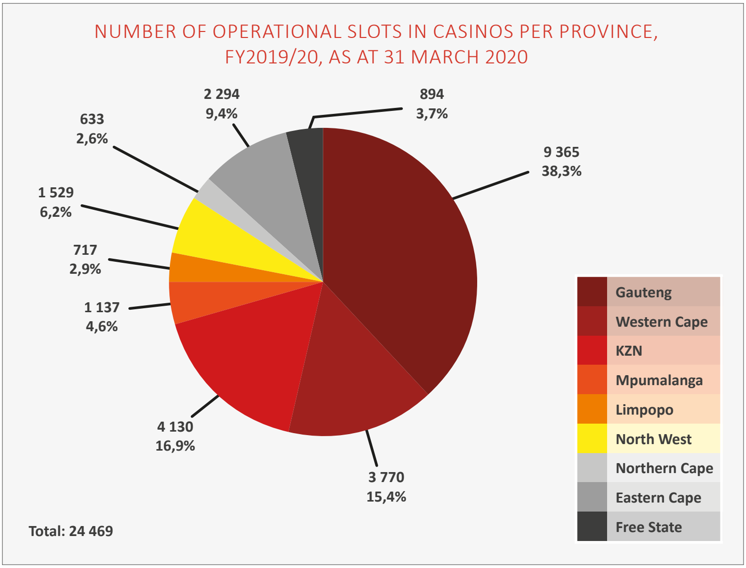


Figure 14: Number of operational slots in casinos per province, FY2019/20, as at 31 March 2020

3.1.4 Gauteng accounted for the highest number of operational tables (364, 38.9%) out of a total of 935, compared to KwaZulu-Natal (166, 17.8%) and Western Cape (118, 12.6%) as at 31 March 2020. Overall, the number of operational tables increased by 7.6% from FY2016/17 (907) to 976 (FY2017/18, Qrt 4), but decreased by 4.5% from FY2017/18 to 932 in FY2018/19, mainly as a result of a decrease in the number of operational tables in Gauteng, North West and

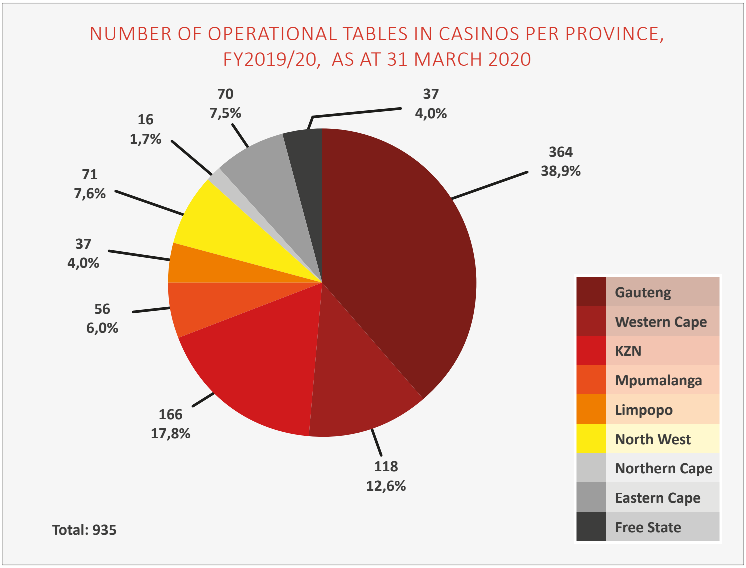


Figure 15: Number of operational tables in casinos per province, FY2019/20, as at 31 March 2020

Eastern Cape. An increase was recorded in FY2019/20 as at 31 March 2020 to 935 operational tables.

3.1.5 The number of operational gambling positions is calculated as the number of slots, plus the average number of positions that each table represents at a casino. The number of positions per table differs depending on the nature of the table game, as well as the licensing conditions in a province. Gauteng has the highest number of casinos in South Africa (7 out of 39 operational casinos) as at 31 March 2020 and also accounted for the highest number of operational gambling positions in casinos (9729, 31.9%) out of a total of 30 515, followed by KwaZulu-Natal (6 454, 21.2%) and Western Cape (4 478, 14.7%) as illustrated in figure 16.

3.1.6 The number of operational gambling positions in casinos (slots and tables) increased by 8.1% from FY2016/17 (33 249) to FY2017/18 (35 929), but decreased by 0.4% (35 768) in FY2018/19, mainly as a result of a decrease in Gauteng and Mpumalanga and drastically declined in FY2019/20 as at 31 March 2020 by 14.7% to 30515 mainly as a result of declines in Gauteng, Mpumalanga, Northern Cape, Eastern Cape and Free State as shown on figure 17.

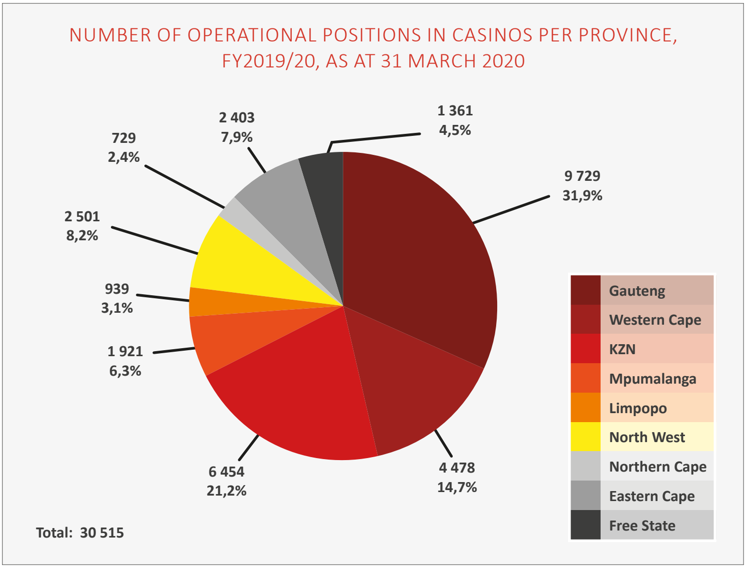
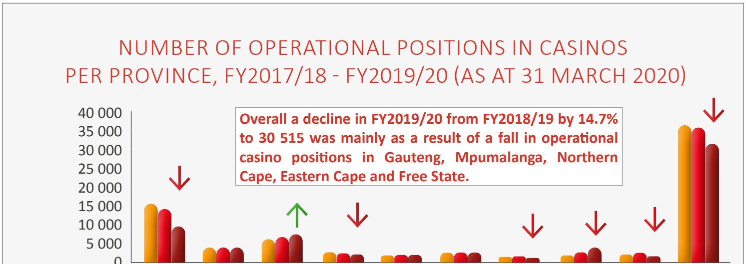


Figure 16: Number of operational positions in casinos per province, FY2019/20, as at 31 March 2020



	Gauteng	Western Cape	KwaZulu-Natal	Mpumalanga	Limpopo	North West	Northern Cape	Eastern Cape	Free State	All provinces
Operational positions, FY2017/18, Qrt 4	15 248	4 478	5 988	1 955	939	2 501	732	2 683	1 405	35 929
Operational positions, FY2018/19, Qrt 4	14 492	4 478	6 414	1 939	939	2 501	735	2 848	1 422	35 768
Operational positions, FY2019/20, Qrt 4	9 729	4 478	6 454	1 921	939	2 501	729	2 403	1 361	30 515

Increased Decreased No change between FY2018/19 and FY2019/20

Figure 17: Number of operational positions in casinos per province, FY2017/18 – FY2019/20 (as at 31 March 2020)

3.2 CASINO SECTOR GAMBLING STATISTICS

3.2.1 Turnover (money wagered), per province in casinos in FY2019/20:

i) The total Rand value of money wagered in casinos in FY2019/20 was R292 281 542 623. This amount represents 64.7% of the total turnover (money wagered) in all gambling modes, compared to money wagered on betting on horse racing and sport, LPM and bingo.

ii) As at 31 March 2020, Gauteng has the highest number of casinos compared to other provinces resulting in the highest amount of money wagered during FY2019/20 at these gambling venues (45.3%). This is followed by money wagered in casinos in KwaZulu-Natal (20.7%) and Western Cape (15.8%) as reflected in figure 18.

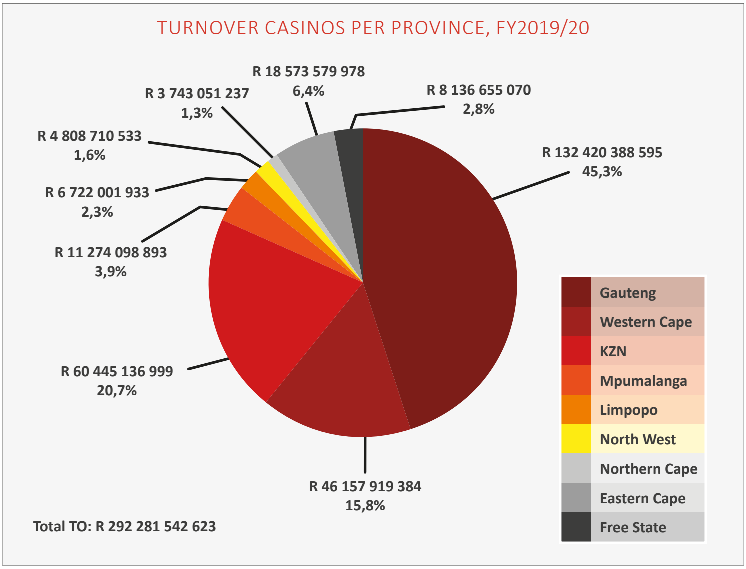


Figure 18: Turnover casinos per province, FY2019/20

3.2.2 Gross Gambling Revenue (GGR) generated in the casino sector per province, FY2019/20:

i) The total Rand value of GGR generated in casinos during FY2019/20 was R18 394 077 253. This amount represents 56.3% of the total amount of GGR generated by all gambling modes compared to GGR generated in the betting on horse racing and sport, LPM and bingo sectors during FY2019/20. GGR generated by the casino sector decreased by 1.8% from FY2015/16 (R 18 236 685 695) to FY2016/17 (R 17 900 747 071), increased by 2.9% from FY2016/17 to R18 417 094 967 in FY2017/18, and increased by only 1.2% from FY2017/18 to R18 632 408 686 in FY2018/19 but declined by 1.3% in FY2019/20. The end of the Financial Year 2019/20 was marred by the entrance of a global pandemic that has left the international community, the domestic economy and the gambling industry in economic turmoil as countries institute stringent measures to contain the spread of the virus.The nationwide shutdown in response to the Covid-19 pandemic instituted at the end of March meant that all landbased gambling estalishments were shut down. The impact of this was seen in a drop in GGR in FY2019/20Q4 from the previous year of 9%.

ii) Gauteng has the highest number of casinos compared to other provinces resulting in the highest amount of GGR generated during FY2019/20 in these gambling venues (44.8%), followed by KwaZulu-Natal (19.6%) and Western Cape (16.0%) as reflected in figure 19.

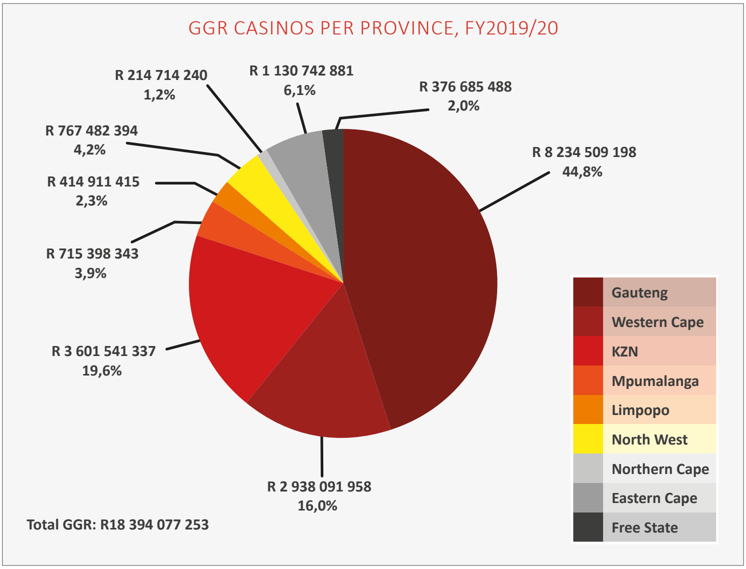


Figure 19: GGR casinos per province, FY2019/20

3.2.3 Taxes/levies collected by PLAs from the casino sector per province in FY2019/20:

i) The total Rand value of taxes/levies collected by PLAs from the casino sector in FY2019/20 was R1 883 771 356. This amount represents 58.7% of the total amount of taxes/levies collected from all gambling modes (inclusive of betting on horse racing and sport, LPMs and bingo). A decrease by 7.3% was recorded in taxes/levies collected from FY2015/16 (R 1 969 759 247) to FY2016/17 (R 1 826 714 702), an increase by 2.8% was reflected from FY2016/17 to FY2017/18 (R 1 877 683 303), and an increase by 2.7% from FY2017/18 to R1 927 643 751 noted in FY2018/19. A decrease was noted between FY2018/19 and FY2019/20 by 2.3%.

ii) As at 31 March 2020, Gauteng accounted for the highest number of casinos by comparison with other provinces resulting in the highest amount of taxes/levies collected from these gambling venues (39.3%), followed by KwaZulu-Natal (23.3%) and Western Cape (22.6%) as reflected in figure 20.

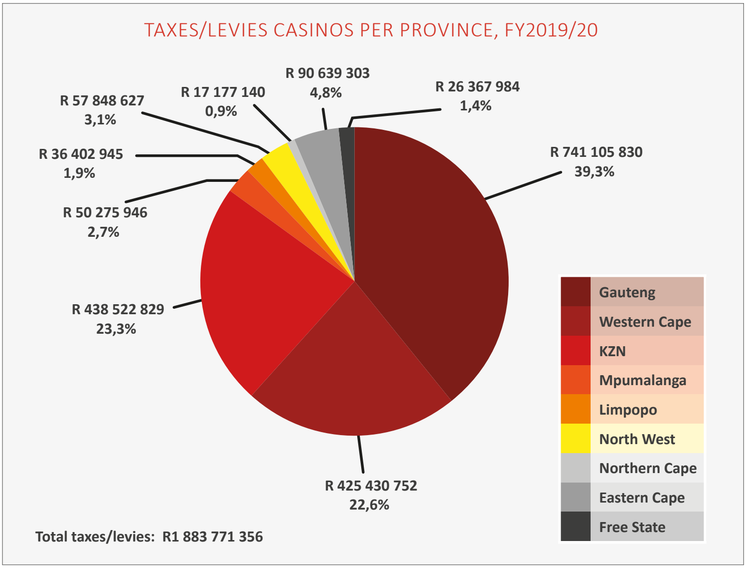


Figure 20: Taxes/levies casinos per province, FY2019/20

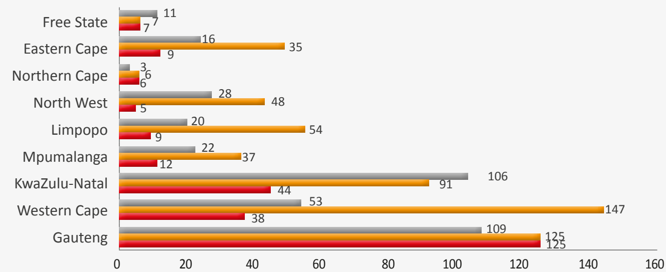
CHAPTER 4:

BETTING ON HORSE RACING AND SPORT SECTOR

4.1 MARKET CONDUCT

4.1.1 As at 31 March 2020, Gauteng accounted for the highest number of licensed operational bookmakers (125) followed by KwaZulu-Natal (44) and Western Cape (38). The highest number of licensed operational bookmaker outlets were situated in the Western Cape (147), followed by Gauteng (125) and KwaZulu-Natal (91). Gauteng and KwaZulu-Natal accounted for the highest number of licensed operational totalisator outlets (109) and (106) respectively followed by Western Cape (53).

NUMBER OF OPERATIONAL BOOKMAKERS, TOTALISATOR AND BOOKMAKER OUTLETS PER PROVINCE, FY2019/20, AS AT 31 MARCH 2019/20



	Gauteng	Western Cape	KwaZulu-Natal	Mpumalanga	Limpopo	North West	Northern Cape	Eastern Cape	Free State
Operational totalisator outlets	109	53	109	22	20	28	3	16	11
Operational bookmaker outlets	125	147	91	37	54	48	6	35	7
Operational bookmakers	125	38	44	12	9	5	6	9	7

Figure 21: Number of licensed operational bookmakers, totalisator and bookmaker outlets, FY2019/20, as at 31 March 2020

4.2 BETTING ON HORSE RACING AND SPORT SECTOR GAMBLING STATISTICS

i) It is important to note that as far as Eastern Cape statistics are concerned, figures for betting on horse racing are inclusive of betting on sport. Unfortunately no splits are available, and therefore, these values and percentages should be read with due caution.

4.2.1 Turnover in the betting sector (totalisators and bookmakers), per province in FY2019/20:

i) The total Rand value of money wagered in the betting on horse racing and sport sector during FY2019/20 was R75 700 192 595. This amount represents 16.8% of all turnover (money wagered) relevant to all gambling modes, by comparison to money wagered in the licensed casino LPM and bingo sectors.

ii) As at 31 March 2020, Gauteng accounted for the highest amounts of money wagered in the betting on horse racing and sport industry (50.1%) compared to Western Cape (19.9%) and KwaZulu-Natal (13.4%), as reflected in figure 22.

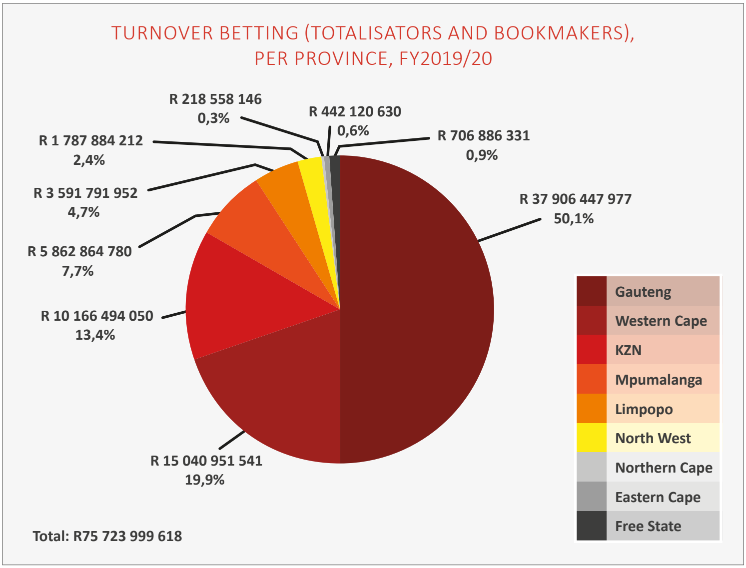


Figure 22: Turnover betting (totalisators and bookmakers), per province, FY2019/20

4.2.2 Gross gambling revenue generated in the betting sector (totalisators and bookmakers), per province in FY2019/20:

i) The total Rand value of GGR generated in the betting on horse racing and sport sector during FY2019/20 was R8 765 264 386. This amount represents 26.4% of the total amount of GGR compared to the other legalised gambling sectors (casino, LPMs and bingo sectors).

ii) As at 31 March 2020, Gauteng accounted for the highest number of licensed operational totalisator outlets and bookmakers compared to other provinces therefore resulting in the highest amount of GGR being generated in the betting industy (42.0%). GGR generated in the Western Cape betting on horse racing and sport sector accounted for 23.9% and KwaZulu-Natal 13.3% out of the total, as reflected in figure 23.

iii) GGR generated in the betting industry increased by 14.3% from R 4 448 765 756 in FY2015/16 to R5 085 630 664 in FY2016/17, by 20.7% from FY2016/17 to R 6 136 832 908 in FY2017/18, and by 17.8% from FY2017/18 to R 7 227 082 554 in FY2018/19. An increase by 21.3% was then noted from FY2018/19 to FY2019/20.

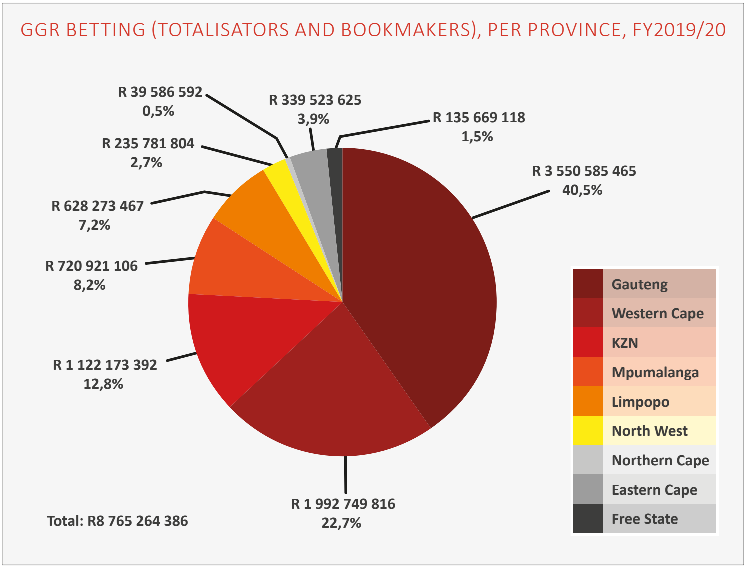
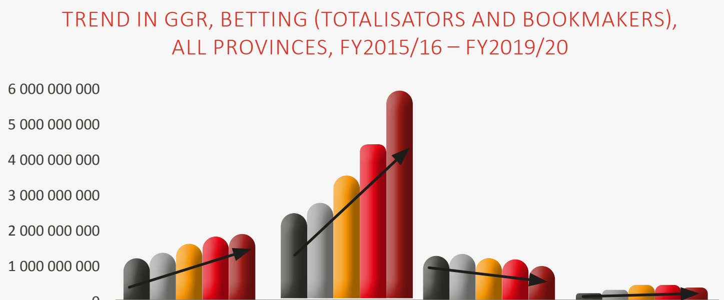


Figure 23: GGR betting (totalisators and bookmakers), per province, FY2019/20

iv) From FY2015/16 to FY2019/20, a consistent increase in GGR was generated by bookmakers offering betting on sports, and horse racing. GGR generated by bookmakers offering betting on sport increased by 22.0% from FY2015/16 to FY2016/17, by 35.4% from FY2016/17 to FY2017/18, by 20.7% from FY2017/18 to FY2018/19 and by 28% from FY2018/19 to FY2019/20. GGR generated by totalisators offering betting on sports betting reflected an increase by 15.1% from FY2015/16 to FY2016/17, an increase by 19.2% from FY2016/17 to FY2017/18, however decreased by 6.5% from FY2017/18 to FY2018/19 and further declined by 17% in FY2019/20. GGR relative to betting on horse racing offered by bookmakers increased by 11.9% from FY2015/16 to FY2016/17, increased by 12.6% from FY2016/17 to FY2017/18, and increased by 29.5% from FY2017/18 to FY2018/19 and by only 2% in FY2019/20. GGR relative to betting on horse racing offered by totalisators increased by 0.3% from FY2015/16 to FY2016/17, but decreased by 7.7% from FY2016/17 to FY2017/18, and decreased by 0.6% from FY2017/18 to FY2018/19 before further decreasing by 17%. In monetary value, bookmakers offering betting on sport also generated the highest amounts of GGR in the betting industry from FY2015/16 to FY2019/20 as reflected figure 24.



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
FY2015/16	1 023 035 305	2 157 995 813	1 023 264 197	244 470 444
FY2016/17	1 145 152 334	2 632 669 149	1 026 450 253	281 358 927
FY2017/18	1 289 865 606	3 563 907 799	947 674 300	335 385 203
FY2018/19	1 670 139 075	4 317 057 494	941 913 021	313 592 486
FY2019/20	1 709 552 821	5 982 739 608	803 813 609	269 158 347

Figure 24: Trend in GGR, betting (totalisators and bookmakers), all provinces, FY2015/16 – FY2019/20

4.2.3 Taxes/levies collected by PLAs from the betting sector (totalisators and bookmakers), per province, in FY2019/20:

i) The total Rand value of taxes/levies collected by PLAs from the betting o n horse racing and sport sector during FY2019/20 was R 669 908 119. This amount represents 19.9% of the total amount of taxes/levies collected from all gambling modes (inclusive of casinos, LPMs and bingo). The collection of taxes/levies increased by 8.5% from R 396 775 739 in FY2015/16 to R 430 497 110 in FY2016/17, increased by 16.1% from FY2016/17 to R 499 817 351 in FY2017/18, and increased by 11.4% from FY2017/18 to R556 709 987 in FY2018/19 and increased by 20.3% in FY2019/20.

ii) As at 31 March 2020, Gauteng accounted for the highest number of licensed operational totalisator outlets and bookmakers compared to other provinces therefore resulting in the highest amount of betting taxes collected in the betting industry (40.1%), followed by KwaZulu-Natal (22.1%) and Western Cape (18.1%).

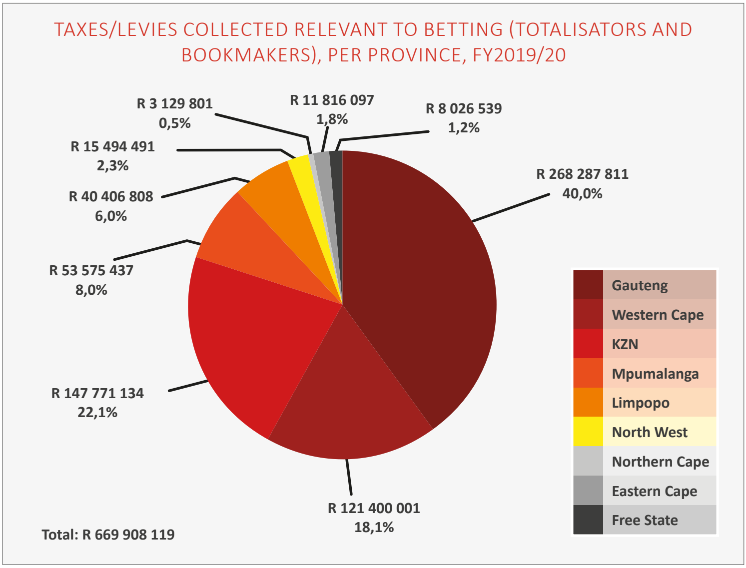
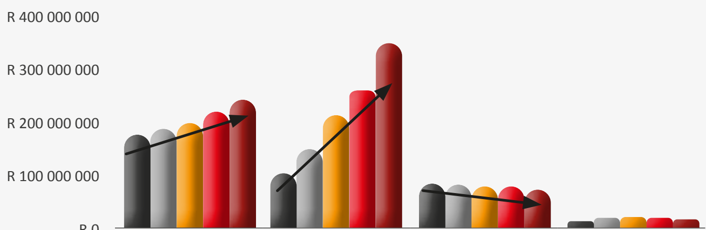


Figure 25:Taxes/levies collected relevant to betting (totalisators and bookmakers), per province, FY2019/20

iii) The collection of taxes/levies collected from bookmakers offering sports betting increased by 27.7% from FY2015/16 to FY2016/17, increased 37.7% from FY2016/17 to FY2017/18, increased by 17.6% from FY2017/18 to FY2018/19 and by 21.4% to FY2019/20. An increase by 36.5% was noted from FY2015/16 to FY2016/17, by 1.4% to FY2017/18 and a decrease by 10.1% between FY2018/19 and FY2019/20 by totalisators offering sports betting. In comparison, the collection of taxes/levies from betting on horse racing offered by bookmakers increased by 3.0% from FY2015/16 to FY2016/17, increased by 8.1% from FY2016/17 to FY2017/18, increased by 13.2% from FY2017/18 to FY2018/19 and by 9.7% to FY2019/20. Taxes/levies collected from betting on horse racing offered by totalisators decreased by 12.4% from FY2015/16 to FY2016/17, decreased by 4.3% from FY2016/17 to FY2017/18, and decreased by 4.7% from FY2017/18 to FY2018/19 before further declining by 15.5% in FY2019/20. From FY2015/16 to FY2019/20, bookmakers offering betting on sports and horse racing generated much higher GGR than taxes/levies collected from totalisators as illustrated on figure 26.

TREND IN TAXES/LEVIES COLLECTED RELEVANT TO BETTING (TOTALISATORS AND BOOKMAKERS), FY2015/16 – FY2019/20



	Bookmakers, Horse racing	Bookmakers, Sports betting	Totalisators, Horse racing	Totalisators, Sports betting
FY2015/16	R 185 853 671	R 116 983 455	R 78 996 242	R 14 942 372
FY2016/17	R 191 457 705	R 149 433 682	R 69 202 264	R 20 403 459
FY2017/18	R 207 019 752	R 205 840 847	R 66 260 932	R 20 695 820
FY2018/19	R 234 294 532	R 242 062 102	R 63 114 445	R 19 163 213
FY2019/20	R255 725 137	R342 839 295	R54 125 488	R17 218 199

Figure 26: Trend in taxes/levies collected relevant to betting (totalisators and bookmakers), FY2015/16 – FY2019/20

CHAPTER 5:

LIMITED PAYOUT MACHINE SECTOR

5.1 MARKET CONDUCT

5.1.1 The main role players in the LPM sector can be defined in three specific categories, namely route and independent operators, site operators and the National Central Electronic Monitoring System (NCEMS). Route/independent operators are companies that are licensed to own, manage and operate LPMs throughout the country. Site operators are privately-owned hotels, pubs or eating establishments, totalisator or bookmaker outlets which may be situated throughout the country. NCEMS is a centralised LPM monitoring and evaluation system operating on a long-term contract basis by Route Monitoring.

5.1.2 The highest number of operational site operators in FY2019/20 as at 31 March 2020 were situated in KwaZulu-Natal being a total of 575 (23.0%), followed by 527 (21.1%) in Gauteng and 447 (17.9%) in Western Cape.

5.1.3 KwaZulu-Natal has the highest number of licensed active LPMs in FY2019/20 as at 31 March 2020, being 3075 (22.0%), followed by Gauteng that accounted for 2549 (18.2%) and Western Cape 2029 (14.5%), as reflected in figure 27.

5.1.4 The number of licensed active LPMs increased by 2.1% from 11 502 (FY2016/17) to 11 744 in FY2017/18, and increased by 11.0% from FY2017/18 to 13 034 in FY2018/19 as a result of increases in almost all provinces except Northern and Eastern Cape. This further increased by 8.4% to 14130 in FY2019/20.

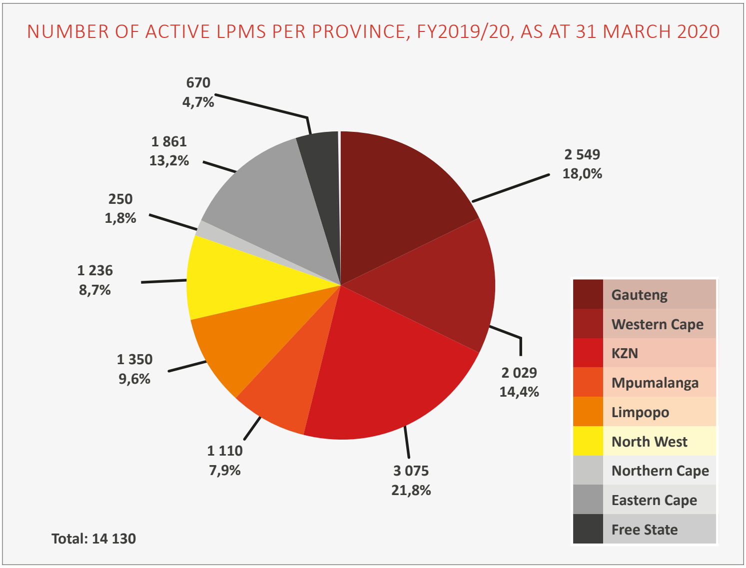


Figure 27: Number of active LPMs per province, FY2019/20, as at 31 March 2020

5.2 LPM SECTOR GAMBLING STATISTICS

5.2.1 Turnover (Rand value of money wagered) in the LPM sector per province in FY2019/20:

i) The total Rand value of money wagered in the LPM sector during FY2019/20 was R48 765 701 602. This amount represents 10.8% of all turnover (money wagered) represented by all gambling modes, in comparison to money wagered at licensed casinos, racing & betting and bingo outlets.

ii) KwaZulu-Natal accounted for the highest number of licensed active LPMs (3075) and operational site operators (575) in FY2019/20 (as at 31 March 2020), however, the highest amounts of money wagered in the LPM sector (at 26.6% out of the total) was wagered in Western Cape during FY2019/20. This is followed by money wagered at LPM outlets during FY2019/20 in KwaZulu-Natal being 24.3% and Gauteng being 17.6% out of the total amount of money wagered as reflected in figure 28.

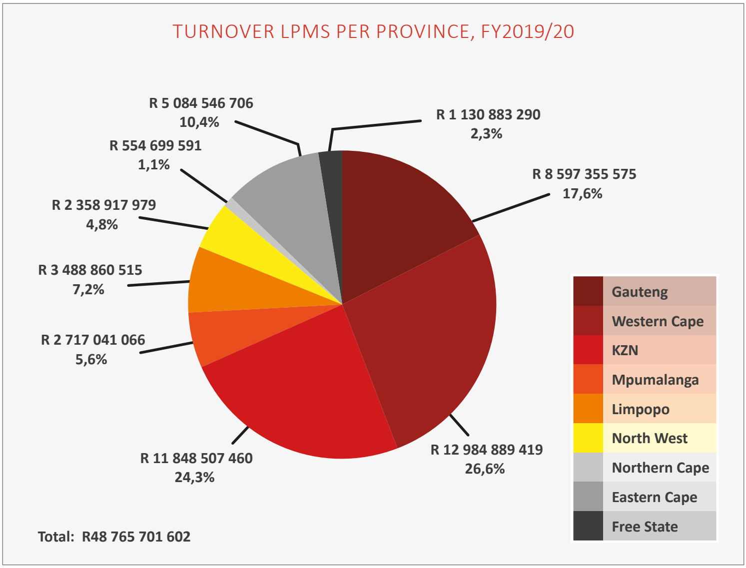


Figure 28: Turnover LPMs per province, FY2019/20

5.2.2 Gross gambling revenue generated in the LPM sector per province in FY2019/20:

i) The total Rand value of GGR generated in the LPM sector during FY2019/20 was R3 681 852 665. This amount represents 11.3% of the total amount of GGR generated by all gambling modes and in comparison to GGR generated by the casino, racing & betting and bingo sectors. GGR in the LPM sector increased by 14.1% from FY2015/16 (R 2 363 501 788) to R 2 696 846 443 in FY2016/17, increased by 9.8% from FY2016/17 to R 2 960 822 948 in FY2017/18, increased by 13.2% in FY2017/18 to R3 350 530 532 in FY2018/19 and increased by 9.9% in FY2019/20.

ii) Western Cape accounted for the highest amount of GGR generated in the LPM sector being 26.9% out of the total in FY2019/20 (as at 31 March 2020). KwaZulu-Natal has the highest number of licensed active LPMs compared to the other provinces, however the GGR generated by LPMs in KwaZulu-Natal accounted for 24.6% and Gauteng accounted for 17.2% as reflected in figure 29.

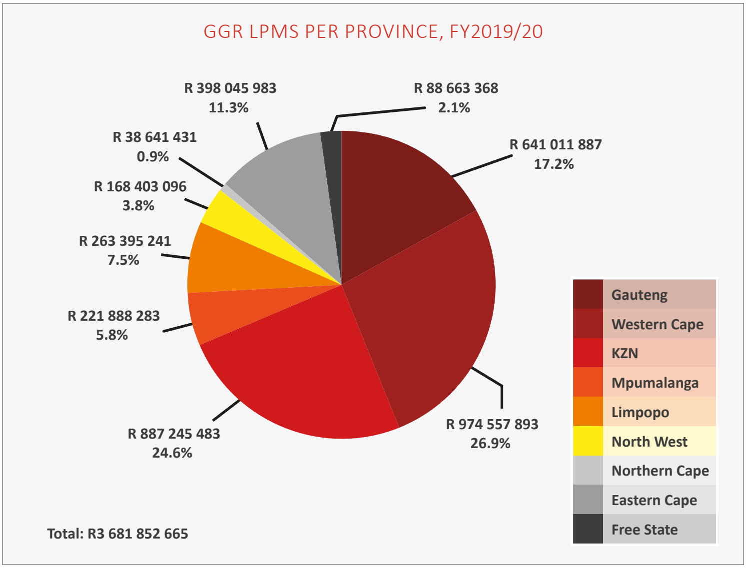


Figure 29: GGR LPMs per province, FY2019/20

5.2.3 Taxes/levies collected by PLAs from the LPM sector per province in FY2019/20:

i) The total Rand value of taxes/levies collected by PLAs from the LPM sector during FY2019/20 was R482 878 260. This amount represents 15.0% of the total amount of taxes/levies collected by PLAs from all gambling industries inclusive of the casino, racing & betting and bingo sectors. The collection of taxes/levies increased by 14.8% from R 302 620 457 in FY2015/16 to R 347 357 694 in FY2016/17, increased by 12.9% from FY2016/17 to R 392 262 823 in FY2017/18, increased by 15.9% from FY2017/18 to R 454 627 239 in FY2018/19 and increased by 6.2% in FY2019/20.

ii) KwaZulu-Natal has the highest number of licensed active LPMs (3075) in comparison to other provinces, but accounted for 27.6% whilst the highest amount of taxes/levies collected was by Western Cape 29.2% during FY2019/20. Gauteng's tax proportion was 19.9% during the same period as reflected in figure 30.

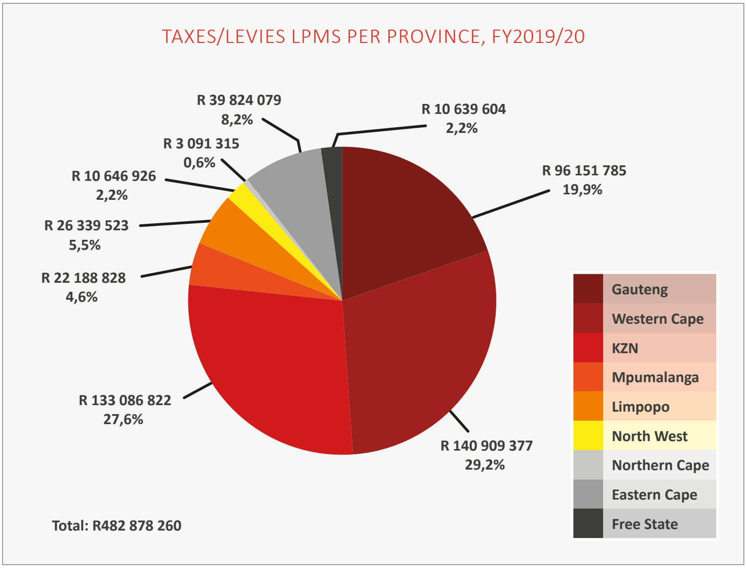


Figure 30: Taxes / levies LPMs per province, FY2019/20

CHAPTER 6:

BINGO SECTOR

6.1 MARKET CONDUCT

i) Of the nine provinces in South Africa, bingo has been rolled out in six provinces namely Gauteng, Mpumalanga, Limpopo, North West, Eastern Cape and KwaZulu-Natal in FY2019/20 (as at 31 March 2020). A total number of 56 (out of 59 licensed) bingo halls were operational as at 31 March 2020 of which 11 were operational in Gauteng, 15 in Eastern Cape, 12 in KwaZulu-Natal, 6 in North West, 6 in Mpumalanga and 6 in Limpopo, as reflected in figure 31.

ii) Gauteng accounted for the highest number of licensed operational bingo positions or seats totaling 3027 (38%) out of a national figure of 8006 licensed operational positions in FY2019/20 as at 31 March 2020, compared to Eastern Cape (2 203, 28%), KwaZulu-Natal (1 119, 14%), Mpumalanga (645, 8%), North West (880, 11%) and Limpopo (132, 2%).

iii) Overall, more EBTs (8103) were operational than traditional bingo positions or seats (1324) as at 31 March 2020. The number of operational bingo positions increased by 31.3% from FY2016/17 (6 497) to 8 520 in FY2017/18, however only increased by 1.1% from FY2017/18 to 8 610 in FY2018/19 and further increased by 9.5% to 9 427.

iv) It is important to note that as at 31 March 2020, more EBTs than traditional bingo seats were operational in all provinces offering bingo for play. No traditional bingo seats were operational in Mpumalanga and Eastern Cape as at 31 March 2020.

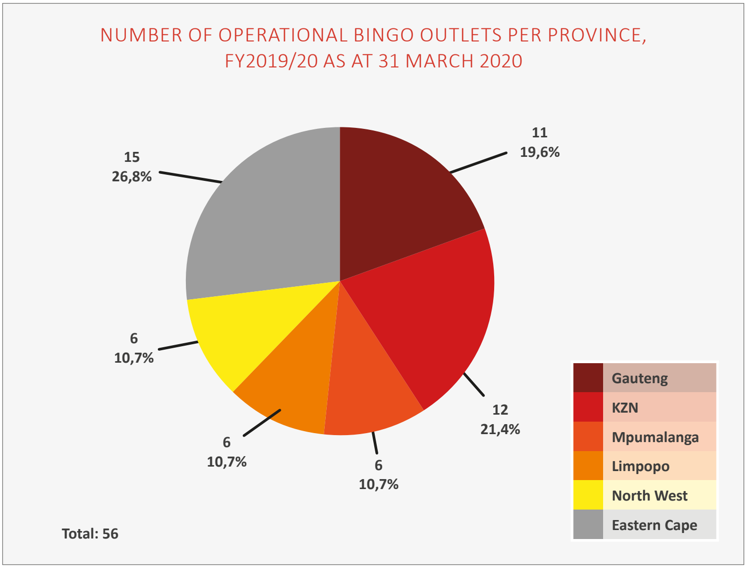


Figure 31: Number of operational bingo outlets per province, FY2019/20 as at 31 March 2020

6.2 BINGO SECTOR GAMBLING STATISTICS

6.2.1 Turnover (Rand value of money wagered) in the bingo sector per province in FY2019/20:

i) The total Rand value of money wagered in the bingo sector during FY2019/20 was R35 151 697 061. This amount represents 7.8% of all turnover (money wagered) representative of all gambling modes, as compared to money wagered at licensed casinos, racing & betting and LPMs.

ii) Bingo is offered for play in six provinces namely Gauteng, KwaZulu-Natal, Mpumalanga, Limpopo, North West and Eastern Cape. The highest amount of money wagered in FY2019/20 was recorded in Gauteng being 36.5%, compared to Eastern Cape at 27.4%, North West at 10.0%, Mpumalanga at 7.9%, Limpopo at 9.7% and KwaZulu-Natal at 8.6% as reflected in figure 32.

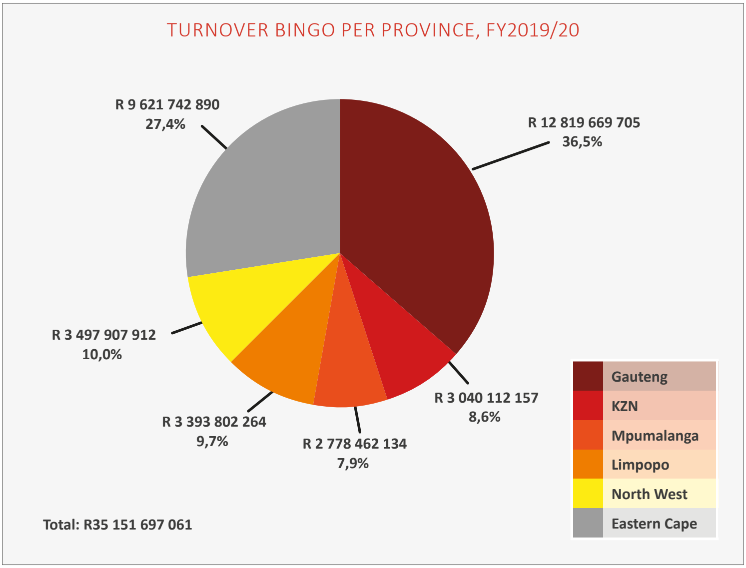


Figure 32: Turnover bingo per province FY2019/20

6.2.2 Gross gambling revenue generated in the bingo sector per province in FY2019/20:

i) The total Rand value of GGR generated by the bingo sector during FY2019/20 was R1 810 774 980. This amount represents 5.5% of the total amount of GGR generated by all licensed gambling modes. An increase by 36.6% was recorded in the generation of GGR from FY2015/16 (R 936 166 348) to FY2016/17 (R 1 278 664 383). In contrast, a decrease of 2.4% in GGR generated from FY2016/17 to FY2017/18 (R 1 248 509 057) was noted mainly as a result of less GGR generated in Gauteng during FY2017/18 compared to FY2016/17. An increase by 26.6% in GGR generated was recorded from FY2017/18 to R 1 580 744 888 in FY2018/19 and a further increase by 14.5% in FY2019/20 was recorded.

ii) Gauteng accounted for the highest number of licensed operational bingo positions (3027) resulting in the highest amount of GGR generated in FY2019/20 at 37.9%, compared to Mpumalanga at 8.7%, North West at 10.1%, Eastern Cape at 26.2%, Limpopo at 9.6% and KwaZulu-Natal at 7.6%,as reflected in figure 33.

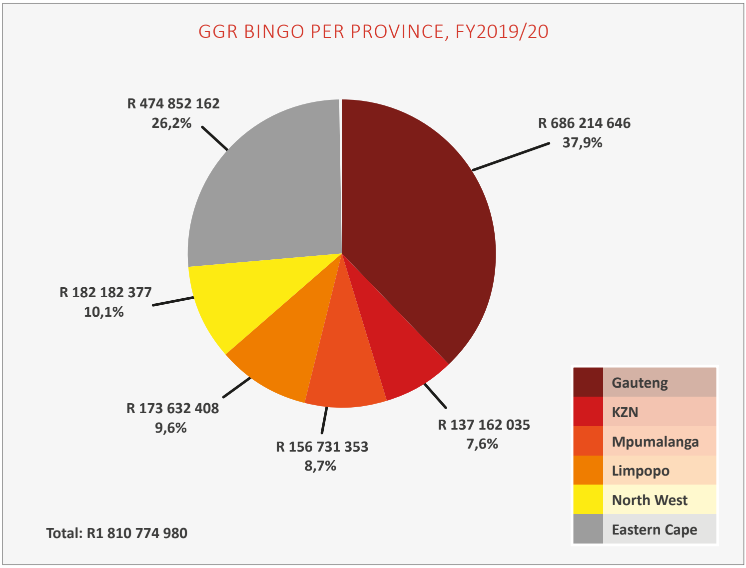


Figure 33: GGR bingo per province, FY2019/20

6.2.3 Taxes/levies collected by PLAs from the bingo sector per province in FY2019/20:

i) The total Rand value of taxes/levies collected from the bingo sector by PLAs during FY2019/20 was R172 210 770. This amount represents 5.4% of all taxes/levies collected from all gambling modes. The collection of taxes/levies increased by 37.6% from FY2015/16 (R 101 588 469) to R 139 826 159 in FY2016/17, however decreased by 7.6% to R 129 221 043 in FY2017/18, but increasd by 20.6% to R 155 778 315 from FY2017/18 to FY2018/19. Taxes also increased by 10.3% in FY2019/20.

ii) Gauteng accounted for the highest number of licensed operational bingo outlets and positions, resulting in the highest amount of taxes/levies collected in FY2019/20 at 47.2% compared to Mpumalanga at 7.3%, North West at 6.7%, Eastern Cape at 27.6%, Limpopo at 8.7% and KwaZulu-Natal at 2.5% as reflected in figure 34.

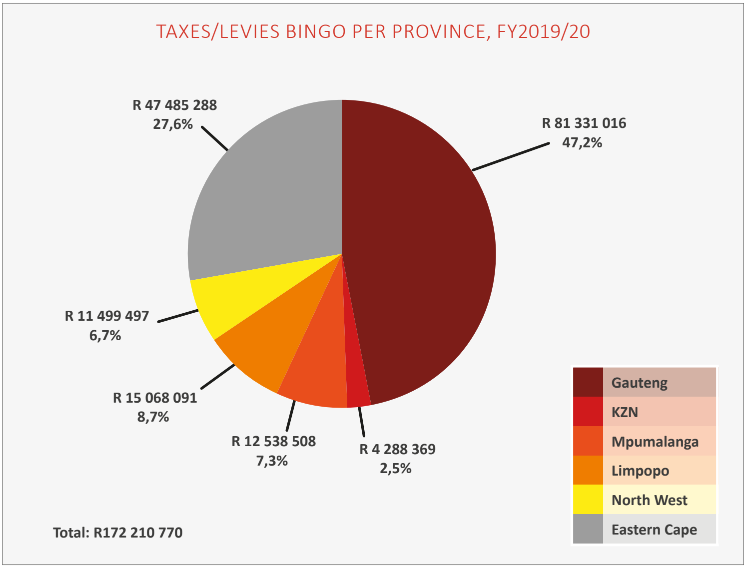


Figure 34: Taxes/levies bingo per province, FY2019/20

CHAPTER 7:

DIRECT EMPLOYMENT AND BROAD-BASED BLACK ECONOMIC EMPOWERMENT CONTRIBUTION LEVELS

7.1 EMPLOYMENT (DIRECT)

7.1.1 NGB monitors direct employment numbers in the gambling sector (industry and regulators). A total number of 34 346 people (direct employment) were employed in the gambling industry (including at regulators) as at 31 March 2020. In general, the casino sector, and KwaZulu-Natal province, accounted for the highest numbers in terms of direct employment in the gambling industry as reflected in the table 1 below.

DIRECT EMPLOYMENT PER PROVINCE AND MODE, FY2019/20											
		PROVINCE									
FY2019/20	Gambling mode	Gauteng	Western Cape	KwaZulu-Natal	Mpumalanga	Limpopo	North West	Northern Cape	Eastern Cape	Free State	TOTAL
	Casinos	5 491	3 447	4 746	720	456	660	306	1 466	631	17 923
	Totalisators	205	464	1 266	69	82	27	12	58	47	2 230
	Bookmakers	528	153	3 208	1 108	1 328	904	132	447	395	8 203
	LPMs	138	74	101	135	768	125	23	1 333	170	2 867
	Bingo	468	N/A	679	172	205	171	N/A	776	N/A	2 471
	Regulators										
	NGB	33									33
	PLAs	112	66	77	78	62	88	16		120	619
Total		**6 975**	**4 204**	**10 077**	**2 282**	**2 901**	**1 975**	**489**	**4 080**	**1 363**	**34 346**

Table 1: Direct employment per province and mode, FY2019/20

7.2 TRANSFORMATION [B-BBEE LEVELS]

7.2.1 Based on the information submitted by PLAs, the average B-BBEE status or contributor level of the South African gambling industry as at 31 March 2020 per gambling mode and operator, was as follows:

- Average B-BBEE level for casino operators: Level 1.5
- Average B-BBEE level for totalisators: Level 5.5
- Average B-BBEE level for LPM operators: Level 1.9
- Average B-BBEE level for bingo operators: Level 2.4 (currently only operational in Gauteng, Mpumalanga, North West, Eastern Cape, KwaZulu-Natal and Limpopo).

A detailed breakdown of B-BBEE levels, per gambling mode and operator, from FY2011/12 to FY2019/20	AVERAGE CONTRIBUTOR/B-BBEE LEVELS, FY2011/12 – FY2019/20								
	FY2011/12	FY2012/13	FY2013/14	FY2014/15	FY2015/16	FY2016/17	FY2017/18	FY2018/19	FY2019/20
Average B-BBEE levels for Casinos	2,5	2,3	2,2	2,1	2,2	2,4	1,6	1,3	1,5
Average B-BBEE levels for Totalisators	3,4	3,2	2,6	2,4	2,3	4,6	4	4	5,5
Average B-BBEE levels for LPM operators	2,7	2,3	2,4	2,3	2,7	3,4	2,8	2,7*	1,9
Average B-BBEE levels for Bingo operators	-	2,7	1	2	1,6	3,4	2,9	2,7	2,4
Average B-BBEE levels for gambling modes*	**2,9**	**2,6**	**2,1**	**2,2**	**2,2**	**3,5**	**2,8**	**2,7***	**2,8**

Table 2: Average B-BBEE levels per gambling mode and operator, FY2011/12 - FY2019/20

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PROBLEM GAMBLING IS TREATABLE
GAMBLE RESPONSIBLY

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