

The 2007 Survey of
CASINO ENTERTAINMENT IN SOUTH AFRICA

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Jabu Mabuza, Chairman: Casino Association of South Africa



A handwritten signature in black ink, which appears to read 'Jabu Mabuza'.

I am pleased to introduce this fourth edition of the Survey of Casino Entertainment in South Africa, an annual publication which continues to provide the interested reader with a comprehensive overview of the casino industry in our country. The 2007 issue again incorporates the most up-to-date statistics on the industry's economic contributions at both the national and provincial level, including data on employment and tax revenues. As such, it provides a valuable reference tool for public policy makers, analysts and others who seek to understand the size, spread and profile of a commercial sector which contributes significantly to capital investment, tax revenue and employment.

The year under review has seen the further expansion of the South African industry, with three new casinos coming into operation - the Golden Valley in Worcester, the Frontier Inn in Bethlehem and Century Casinos' permanent facility at Newcastle. At the same time, there have been extensive upgrades and new investments at GrandWest, Gold Reef City, Sun City, Meropa, and Montecasino. The industry's contribution to the broader leisure and tourism sector has also been demonstrated by new hotel developments at Emperors Palace, Montecasino, Suncoast, Carnival City and at the Golden Valley.

As in previous surveys, this edition reports on corporate social responsibility spending across the industry. As this data reveals, our industry invested nearly R70 million in education, housing, health, arts and culture, sport and other vital social spending during the course of the year under review. At the same time, the industry's commitment to responsible gambling - particularly through the ground-breaking CASA code of conduct, which was introduced in December 2005 - has been further consolidated and one of the consequences of casinos' active involvement in the prevention, treatment and education projects of the National Responsible Gambling Programme (NRGP) is that independent research demonstrates that, despite the expansion of gambling opportunities in South Africa, the incidence of problem gambling has actually been decreasing in recent years.

CASA has always paid considerable attention to transformation in the casino sector and while we believe that our track-record in this respect has been exemplary, we have commissioned Empowerdex to conduct a thorough assessment of our achievements in this area, with a view to maintaining our leading position as pioneers in the management and ownership of assets in southern Africa's tourism and leisure industry.

If the casino industry is to retain the necessary degree of public confidence in its probity and commitment to responsible and safe gambling, it is imperative that it should enable the public to understand the economic benefits that casinos bring to local communities. I hope that the 2007 Survey of Casino Entertainment in South Africa goes some way towards meeting that objective and trust you will find it a valuable reference tool for the facts about casino gambling.

Introduction: Derek Auret, Chief Executive: Casino Association of South Africa



A handwritten signature in black ink, reading 'Derek Auret', with a horizontal line underneath.

The Casino Association of South Africa is pleased to present the 2007 Survey of Casino Entertainment in South Africa. As in previous editions of the survey, this publication provides a comprehensive province-by-province picture of the commercial casino industry, incorporating data that ranges from its economic impact on provincial and national economies to statistics on casino visitation and employment opportunities.

What is clear from the information published in successive issues of the Survey is that after more than a decade of legalised casino gambling, it remains a mature industry that still enjoys considerable growth potential. This is demonstrated by the rate at which new casinos have come into operation, the continuing expansion and refurbishment of existing facilities and their sustained profitability. But this growth comes with a powerful obligation towards the highest and most responsible standards of probity in the conduct of our business. The industry's commitment to corporate citizenship and social responsibility is again revealed in the sections of this survey which deal with corporate social investment and responsible gambling.

CASA not only represents and promotes the interests of the country's legal casino gaming industry, but also recognises the sector's obligations and duties towards the millions of South Africans who visit casinos. Our emphasis, therefore, is on playing a constructive and positive role in the evolution of good public policy and good governance in respect of the casino industry.

Integral to this mandate is the provision of reliable and timeous information about the casino industry's contribution to provincial and local economies, its impact on a national scale and its benefits to the communities within which it operates. If we are to seek to influence public policy and address misperceptions and stereotypes about the industry, it is clearly essential that we should do so on the basis of well researched data which is easily available to a wide range of stakeholders.

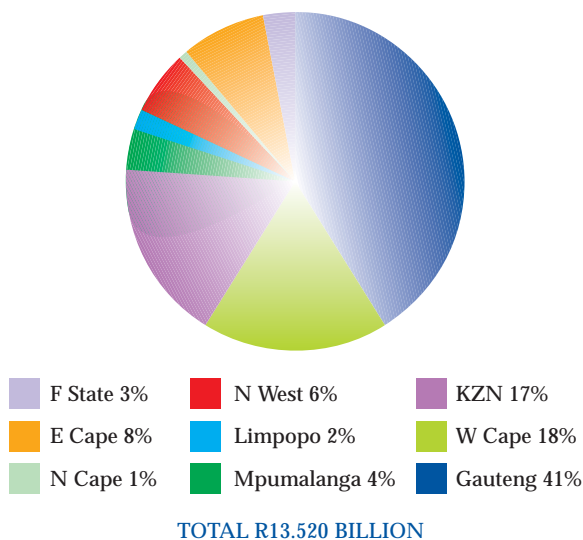
Of course, this survey should not be read in isolation from the wealth of related data which is available on the CASA website and in our other publications. There is a rich repository of information about the social and economic impact of South Africa's casino industry in the research published by the National Gambling Board and the National Responsible Gambling Programme, all of which complements the material contained in this edition of the annual survey.

It is now eleven years since South Africa's first National Gambling Act came into operation, and there can be no doubt that in that period casino gambling has developed an enviable reputation as a leisure activity which, if undertaken responsibly, brings measurable recreational, economic and social benefits to communities throughout the country. This edition of the survey documents the nature of this impact and we hope it will serve as a useful and interesting source of information for those who seek to gain a thorough understanding of the contribution which South African casinos make to the development of the South African economy.

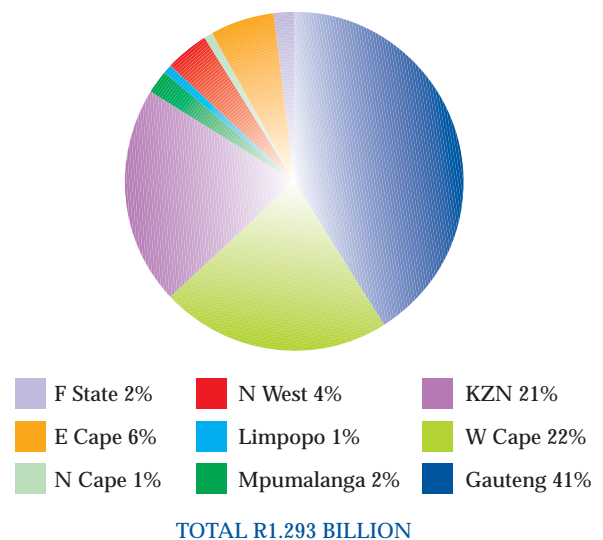
National Gambling Statistics: 2006/7 Financial Year

In August 2007 the National Gambling Board (NGB) published its survey of national gambling statistics for the 2006/2007 financial year, ending 31 March 2007, in which it reported that gross gambling revenue for the year was R13.520 billion, a 15% increase over the previous year's R11.5 billion.

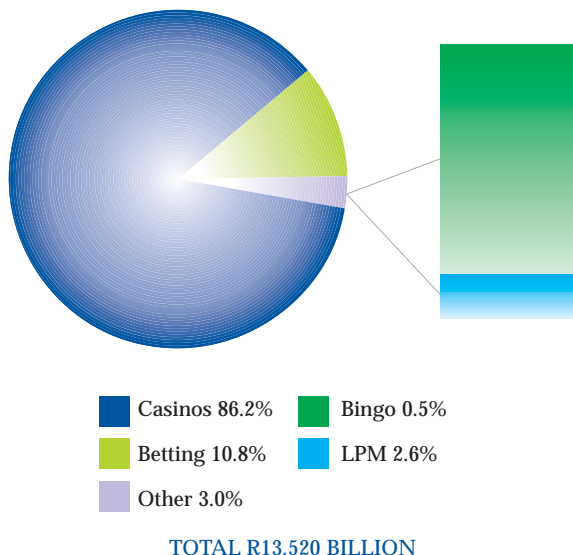
GROSS GAMBLING REVENUE PER PROVINCE:
2006/2007 Financial Year



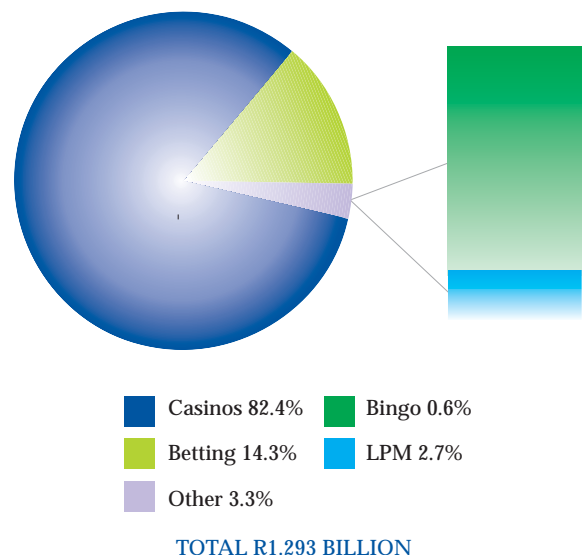
TAX CONTRIBUTION PER PROVINCE:
2006/2007 Financial Year



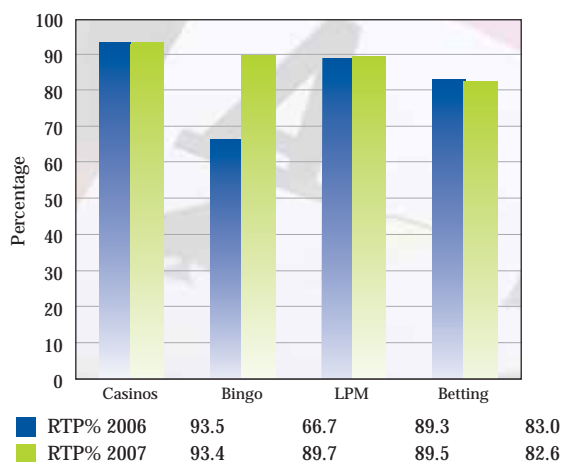
GROSS GAMBLING REVENUE PER GAMBLING MODE:
2006/2007 Financial Year



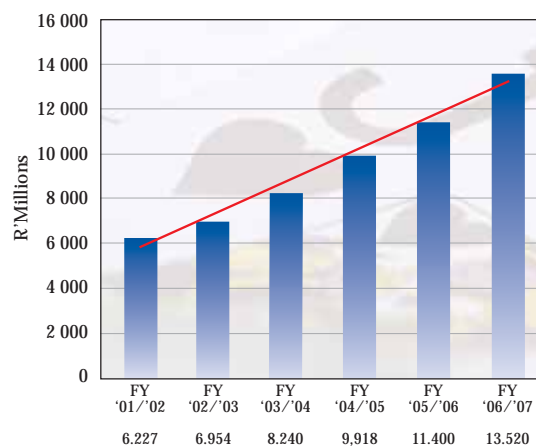
TAX PER GAMBLING MODE:
2006/2007 Financial Year



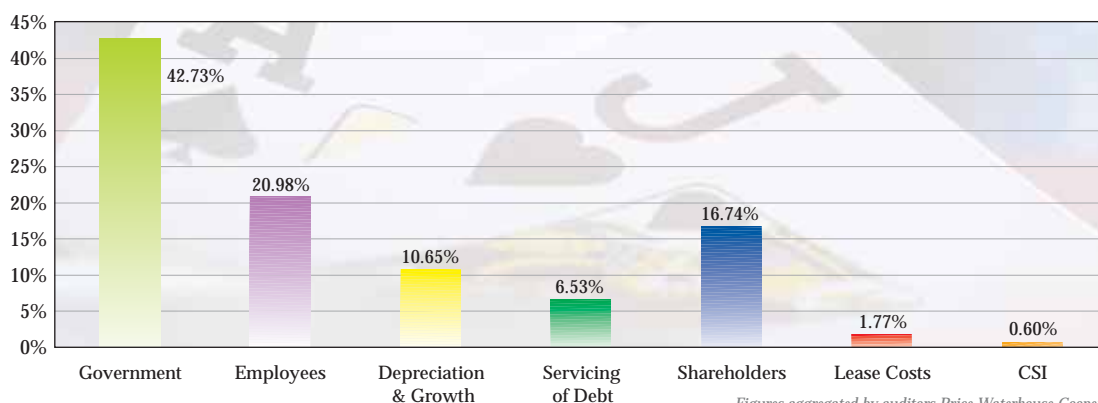
PERCENTAGE OF RTP PER GAMBLING MODE



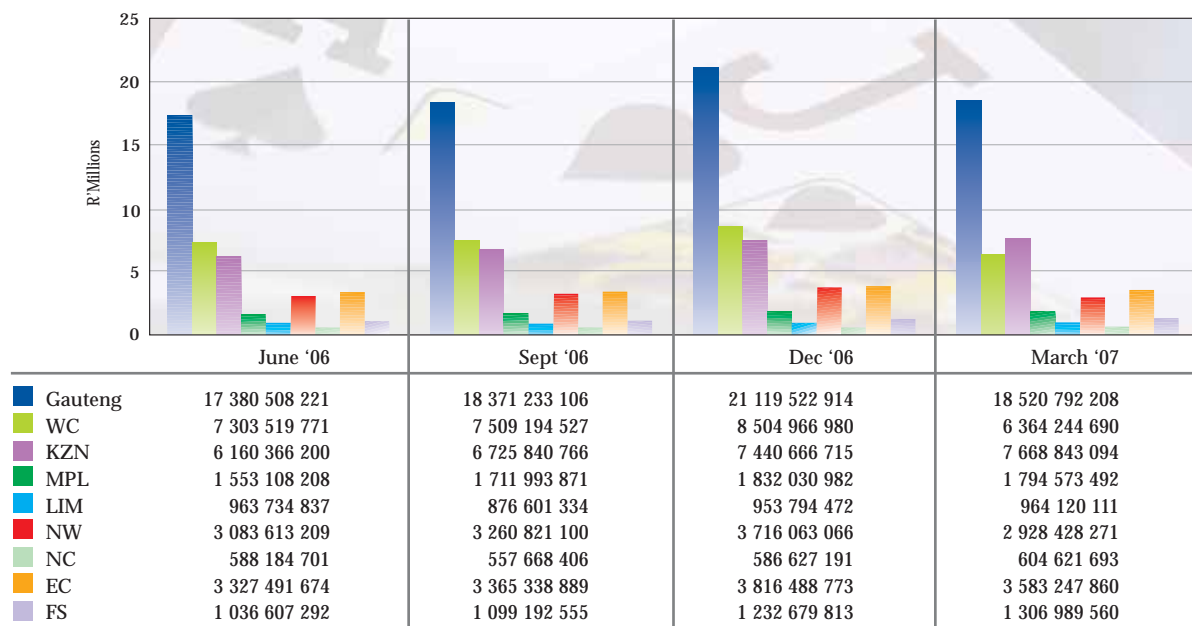
INCREASE IN GAMBLING ACTIVITIES GGR ALL MODELS



CASINO INDUSTRY VALUE ADDED STATEMENT: WHERE THE MONEY GOES: 2006/2007 Financial Year

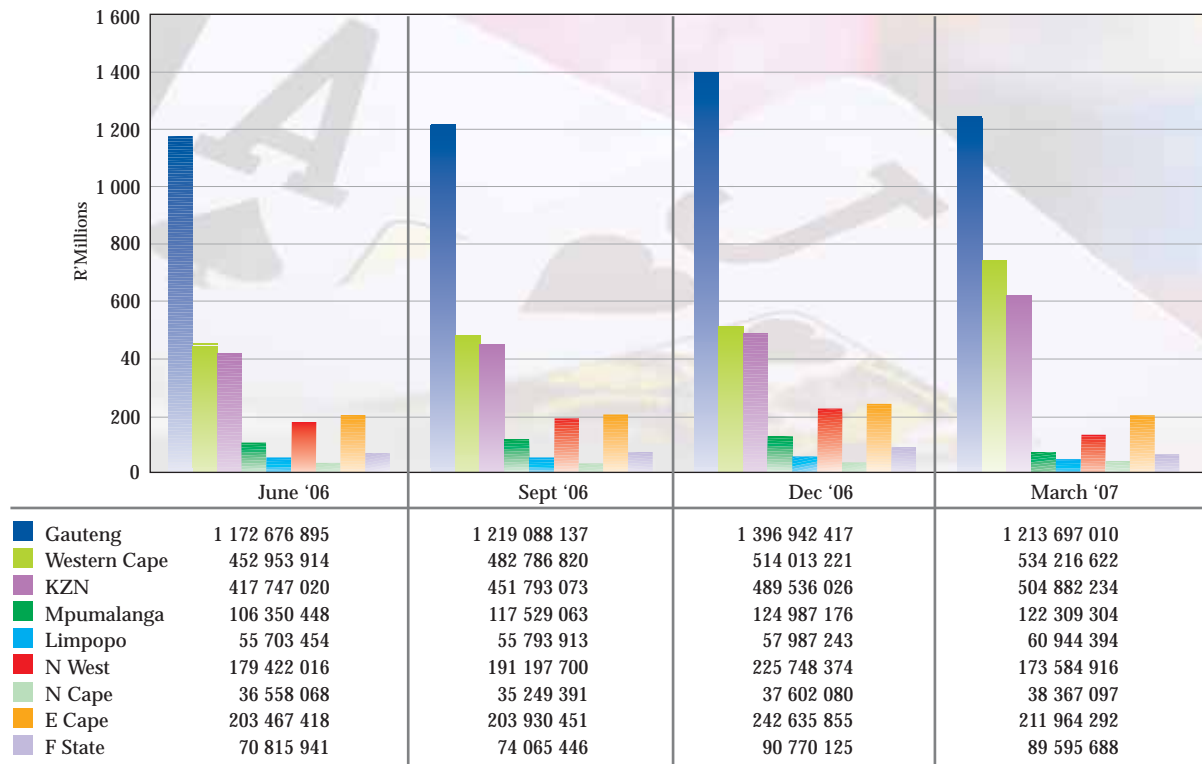


QUARTERLY CASINO TURNOVER: 2006/2007 Financial Year

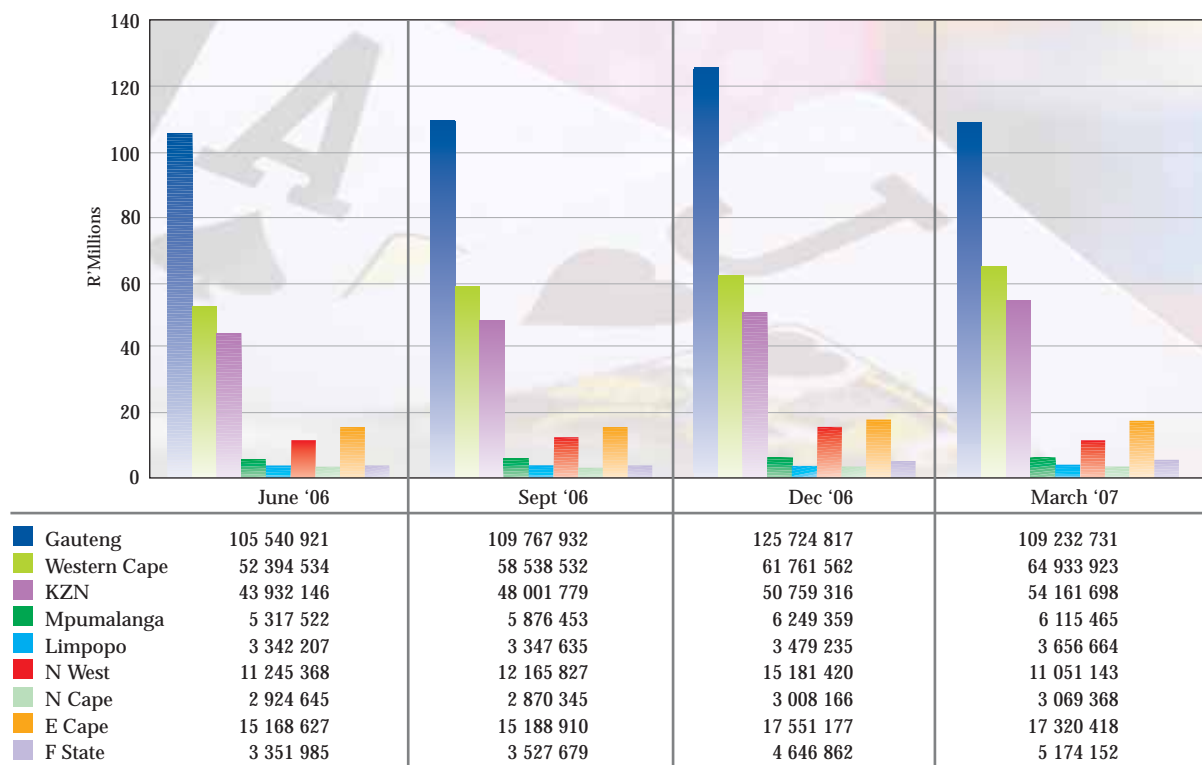


National Gambling Statistics: 2006/7 Financial Year

Quarterly Casino GGR: 2006/2007 Financial Year



Quarterly Casino Tax: 2006/2007 Financial Year



Overview of Casino Entertainment



CASINO GROUP HOLDING LICENCES IN SOUTH AFRICA

	Sun International	Peermont Global	Century Casinos	London Club International	Tsogo Sun Sun	Akani/ Gold Reef	Kgalagadi Casino	Desert Palace
Eastern Cape	2	1*			1	1**		
Free State	2	1				1		
Gauteng	2	1		1	1	2***		
KwaZulu-Natal	1	1	1		1	1		
Limpopo	1	1						
Mpumalanga		1			2			
North West	2	2						
Northern Cape	1						1****	1****
Western Cape	2		1			2		
Total	13	8	2	1	5	7	1	1

* The Royal Palm Hotel, Casino and Convention Resort - preferred bidder

** Lukhanji Leisure - Queen's Casino anticipated opening December 2007

*** Silverstar Casino Resort anticipated opening March 2008

****Leitlho Resort and Entertainment World anticipated opening August 2008

*****Desert Palace is not a member of CASA

Profile of South African Casinos by Province*

EASTERN CAPE

Current number of casinos	3
Proposed number of casinos	5
Number of tables	49
Number of machines	1 630
Casino employees	3 005
Gross casino gaming revenue	R862 million
Casino gaming tax revenue	R65 million
Visitors	5 373 000
Provincial gaming tax base	

Taxable revenue (millions)		Rates of tax
0 – 4		3.0%
4 – 8	120 000	5.0%
>8	320 000	10.0%

EAST LONDON: HEMINGWAYS CASINO

Date opened	September 2001
Operator	Tsogo Sun Emonti (Pty) Ltd
Management company	Tsogo Sun Casino Management Company
Total capital investment	R222 million
Employees	317
Permanent	204
Casual	0
Outsourced	113
Slots	390
Tables	12
Visitors	1 500 000

PORT ELIZABETH: THE BOARDWALK

Date opened	October 2000
Operator	Emfuleni Resorts (Pty) Ltd
Management company	Sun International Management Ltd
Total capital investment	R478 million
Employees	1 434
Permanent	401
Casual	0
Outsourced	1 033
Slots	802
Tables	21
Visitors	3 074 000

BIZANA: WILD COAST SUN

Date opened	December 1981
Operator	Transkei Sun International Ltd
Management company	Sun International Management Ltd
Total capital investment	R152 million
Employees	1 254
Permanent	455
Casual	282
Outsourced	517
Slots	438
Tables	16
Visitors	799 000



QUEENSTOWN: LUKHANJI LEISURE TRADING AS QUEEN'S CASINO

Opening	December 2007
Operator	Gold Reef Resorts Ltd
Management company	Gold Reef Resorts Ltd

MTHATHA: THE ROYAL PALM HOTEL, CASINO AND CONVENTION RESORT

The preferred bidder is Peermont Global (Mthatha).



FREE STATE

Current number of casinos	4
Proposed number of casinos	4
Number of tables	26
Number of machines	727
Casino employees	1 456
Gross casino gaming revenue	R325 million
Casino gaming tax revenue	R17 million
Visitors	2 021 952
Provincial gaming tax base	

Taxable revenue (millions)	Rates of tax
	5.7%

BETHLEHEM: FRONTIER INN AND CASINO

Date opened	November 2006
Operator	Peermont Global (Eastern Free State) (Pty) Ltd
Management company	Peermont Global (Pty) Ltd
Total capital investment	R110 million
Employees	204
Permanent	113
Casual	0
Outsourced	91
Slots	120
Tables	12
Visitors	34 568*

*As this casino opened in November 2006 this figure relates to a period of 4 months.

BLOEMFONTEIN: WINDMILL CASINO

Date opened	October 2005
Operator	Mangaung Sun (Pty) Ltd
Management company	Sun International Management Ltd
Total capital investment	R160 million
Employees	728
Permanent	165
Casual	1
Outsourced	562
Slots	193
Tables	8
Visitors	1 044 000

THABA 'NCHU: NALEDI SUN

Date opened	May 1989
Operator	Sun International (South Africa) Ltd
Management company	Sun International Management Ltd
Total capital investment	R14 million
Employees	129
Permanent	70
Casual	2
Outsourced	57
Slots	188
Tables	0
Visitors	153 000

WELKOM: GOLDFIELDS CASINO AND ENTERTAINMENT CENTRE

Date opened	April 2003
Operator	Goldfields Casino and Entertainment Centre (Pty) Ltd
Management company	Gold Reef Management (Pty) Ltd
Total capital investment	R126 million
Employees	395
Permanent	228
Casual	0
Outsourced	167
Slots	226
Tables	6
Visitors	790 384



Profile of South African Casinos by Province

GAUTENG

Current number of casinos	6
Proposed number of casinos	7
Number of tables	276
Number of machines	7 952
Casino employees	10 913
Gross casino gaming revenue	R5 billion
Casino gaming tax revenue	R450 million
Visitors	20 676 570
Provincial gaming tax base	

Taxable revenue (millions)	Rates of tax
	9.0%

JOHANNESBURG: GOLD REEF CITY

Date opened	October 1998
Operator	Akani Egoli (Pty) Ltd
Management company	Akani Egoli Management (Pty) Ltd - Gold Reef Management
Total capital investment	R225 million
Employees	2 033
Permanent	1 033
Casual	134
Outsourced	866
Slots	1 600
Tables	50
Visitors	2 645 948

FOURWAYS: MONTECASINO

Date opened	November 2000
Operator	Tsogo Sun Casinos (Pty) Ltd
Management company	Tsogo Sun Casino Management Ltd
Total capital investment	R2.7 billion
Employees	2 562
Permanent	1 410
Casual	36
Outsourced	1 116
Slots	1 700
Tables	70
Visitors	7 600 000

MABOPANE: MORULA SUN CASINO

Date opened	June 1987
Operator	Sun International (South Africa) Ltd
Management company	Sun International Management Ltd
Total capital investment	R113 million
Employees	625
Permanent	407
Casual	12
Outsourced	206
Slots	506
Tables	12
Visitors	962 000



VANDERBIJLPARK: EMERALD CASINO RESORT

Date opened	December 1998
Operator	London Clubs International
Management company	London Clubs International
Total capital investment	R583 million
Employees	1 055
Permanent	442
Casual	161
Outsourced	452
Slots	660
Tables	23
Visitors	1 032 299

BRAKPAN: CARNIVAL CITY

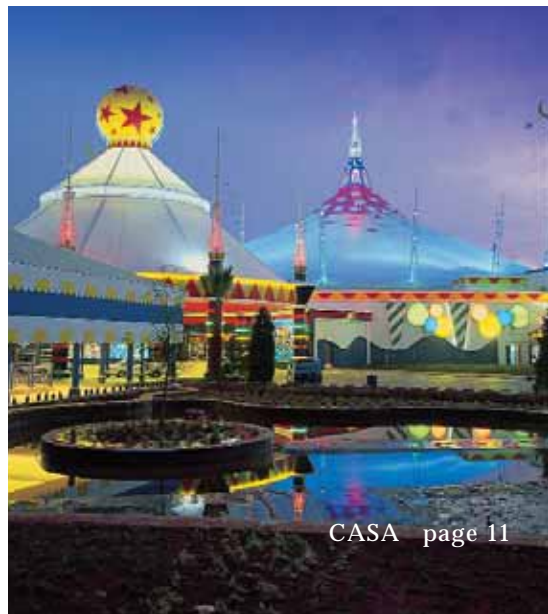
Date opened	December 1998
Operator	Afrisun Gauteng (Pty) Ltd
Management company	Sun International Management Ltd
Total capital investment	R964 million
Employees	2 224
Permanent	682
Casual	0
Outsourced	1 542
Slots	1 762
Tables	60
Visitors	3 780 000

KEMPTON PARK: EMPERORS PALACE HOTEL, CASINO AND CONVENTION RESORT

Date opened	December 1998
Operator	Peermont Global (Pty) Ltd
Management company	Peermont Global (Pty) Ltd
Total capital investment	R1.8 billion
Employees	2 414
Permanent	1 605
Casual	85
Outsourced	724
Slots	1,724
Tables	61
Visitors	4 656 323

WEST RAND: SILVERSTAR CASINO RESORT

Date opened	Anticipated opening March 2008
Operator	Gold Reef Resorts Ltd
Management company	Gold Reef Resorts Ltd



Profile of South African Casinos by Province

KWAZULU-NATAL

Current number of casinos	5
Proposed number of casinos	5
Number of tables	124
Number of machines	3 227
Casino employees	4 048
Gross casino gaming revenue	R2 billion
Casino gaming tax revenue	R197 million
Visitors	14 147 249
Provincial gaming tax base	

Taxable revenue (millions)	Rates of tax
30	9.0%
>30	12.0%
+0.5% local government levy	

DURBAN: SUNCOAST CASINO AND ENTERTAINMENT WORLD

Date opened	November 2002
Operator	Tsogo Sun KZN (Pty) Ltd
Management company	Tsogo Sun Casino Management Company
Total capital investment	R1.4 billion
Employees	1 264
Permanent	971
Casual	0
Outsourced	293
Slots	1 250
Tables	50
Visitors	8 900 000



DURBAN: SIBAYA CASINO AND ENTERTAINMENT KINGDOM

Date opened	February 2001
Operator	Afrisun KZN (Pty) Ltd
Management company	Sun International Management Ltd
Total capital investment	R1.0 billion
Employees	1 593
Permanent	574
Casual	0
Outsourced	1 019
Slots	1 016
Tables	35
Visitors	2 877 000



EMPANGENI: TUSK UMFOLOZI CASINO RESORT

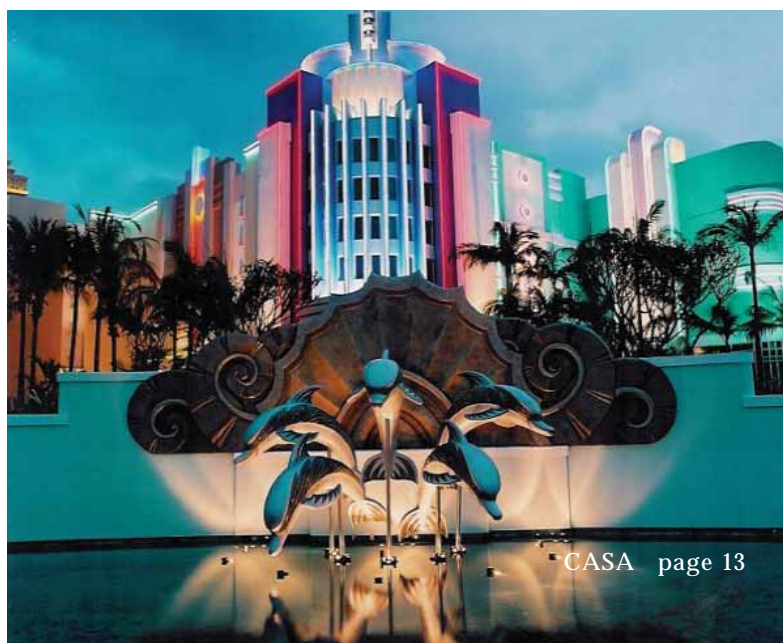
Date opened	May 2002
Operator	Peermont Global (KZN) (Pty) Ltd
Management company	Peermont Global Management (KZN) (Pty) Ltd
Total capital investment	R65 million
Employees	261
Permanent	156
Casual	0
Outsourced	105
Slots	261
Tables	10
Visitors	336 000

NEWCASTLE: CENTURY CASINO NEWCASTLE

Date opened	September 1999
Operator	Century Casinos Africa (Pty) Ltd
Management company	Century Casinos Africa (Pty) Ltd
Total capital investment	R165 million
Employees	326
Permanent	121
Casual	21
Outsourced	184
Slots	250
Tables	6
Visitors	540 000

PIETERMARITZBURG: GOLDEN HORSE CASINO

Date opened	September 2001
Operator	Akani Msunduzi (Pty) Ltd
Management company	Akani Msunduzi Management (Pty) Ltd - Gold Reef Management
Total capital investment	R158 million
Employees	604
Permanent	229
Casual	73
Outsourced	302
Slots	450
Tables	23
Visitors	1 494 249



Profile of South African Casinos by Province

LIMPOPO

Current number of casinos	2
Proposed number of casinos	3
Number of tables	20
Number of machines	465
Casino employees	782
Gross casino gaming revenue	R230 million
Casino gaming tax revenue	R14 million
Visitors	2 130 260
Provincial gaming tax base	

Taxable revenue (millions)	Rates of tax
	6.0%

POLOKWANE: MEROPA CASINO

Date opened	March 2002
Operator	Meropa Leisure and Entertainment (Pty) Ltd
Management company	Sun International Management Ltd
Total capital investment	R182 million
Employees	549
Permanent	231
Casual	3
Outsourced	315
Slots	336
Tables	14
Visitors	1 704 000

THOHOYANDOU: TUSK VENDA CASINO HOTEL

Date opened	December 2001
Operator	Peermont Global (Limpopo) (Pty) Ltd
Management company	Peermont Global Management (NW&L) (Pty) Ltd
Total capital investment	R86 million
Employees	233
Permanent	133
Casual	0
Outsourced	100
Slots	129
Tables	6
Visitors	426 260



MPUMALANGA

Current number of casinos	3
Proposed number of casinos	4
Number of tables	38
Number of machines	1 041
Casino employees	1 205
Gross casino gaming revenue	R471 million
Casino gaming tax revenue	R23 million
Visitors	3 925 795
Provincial gaming tax base	

Taxable revenue (millions)	Rates of tax
	5.7%

WITBANK: THE RIDGE CASINO AND ENTERTAINMENT RESORT

Date opened	September 2002
Operator	Tsogo Sun Casinos (Pty) Ltd
Management company	Tsogo Sun Casino Management Company
Total capital investment	R205 million
Employees	331
Permanent	217
Casual	7
Outsourced	107
Slots	360
Tables	13
Visitors	1 700 000

SECUNDA: GRACELAND HOTEL, CASINO AND COUNTRY CLUB

Date opened	October 1997
Operator	Peermont Global (Southern Highveld) (Pty) Ltd
Management company	Peermont Global Ltd
Total capital investment	R227 million
Employees	491
Permanent	329
Casual	30
Outsourced	132
Slots	358
Tables	14
Visitors	925 795

NELSPRUIT: EMNOTWENI CASINO

Date opened	November 1999
Operator	Tsogo Sun Casinos (Pty) Ltd
Management company	Tsogo Sun Casino Management Company
Total capital investment	R170 million
Employees	383
Permanent	247
Casual	0
Outsourced	136
Slots	323
Tables	11
Visitors	1 300 000



Profile of South African Casinos by Province

NORTH WEST

Current number of casinos	4
Proposed number of casinos	4
Number of tables	75
Number of machines	1 715
Casino employees	7 443
Gross casino gaming revenue	R769 million
Casino gaming tax revenue	R50 million
Visitors	1 923 000
Provincial gaming tax base	

Taxable revenue (millions)	Rates of tax
	3.0%

PILANESBURG: SUN CITY

Date opened	December 1979
Operator	Sun International (South Africa) Ltd
Management company	Sun International Management Ltd
Total capital investment	R81 million
Employees	5 960
Permanent	1 454
Casual	0
Outsourced	4 506
Slots	602
Tables	38
Visitors	598 000

MMABATHO: TUSK MMABATHO CASINO RESORT

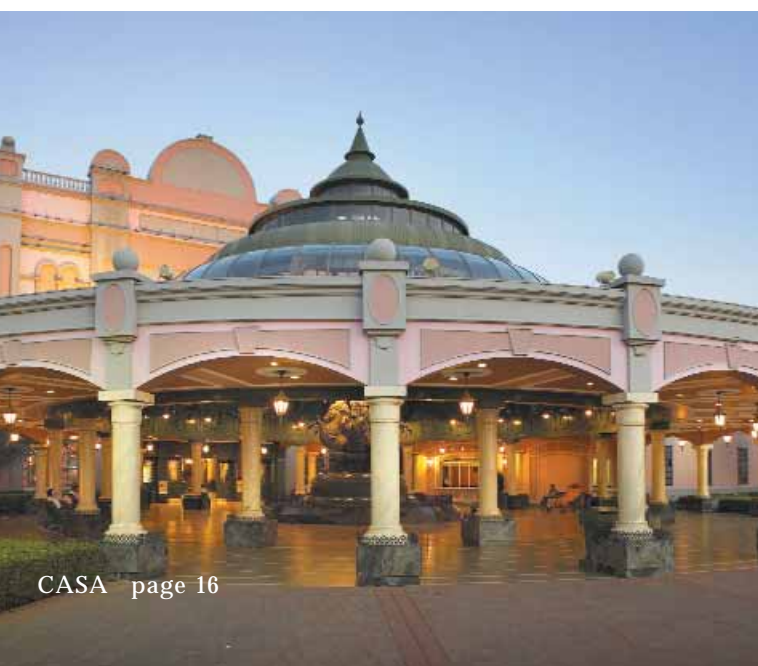
Date opened	September 1977
Operator	Peermont Global (North West) (Pty) Ltd
Management company	Peermont Global Management (NW&L) (Pty) Ltd
Total capital investment	R43 million
Employees	316
Permanent	131
Casual	5
Outsourced	180
Slots	155
Tables	8
Visitors	200 000

KLERKSDORP: TUSK RIO CASINO RESORT

Date opened	September 2004
Operator	Peermont Global (North West) (Pty) Ltd
Management company	Peermont Global Management (NW&L) (Pty) Ltd
Total capital investment	R78 million
Employees	313
Permanent	157
Casual	0
Outsourced	156
Slots	258
Tables	11
Visitors	590 000

HAMMANSKRAAL: THE CAROUSEL

Date opened	November 1991
Operator	Sun International (South Africa) Ltd
Management company	Sun International Management Ltd
Total capital investment	R318 million
Employees	854
Permanent	369
Casual	0
Outsourced	485
Slots	700
Tables	18
Visitors	535 000



NORTHERN CAPE

Current number of CASA-affiliated casinos	1
Proposed number of casinos	3
Number of tables	9
Number of machines	228
Casino employees	313
Gross casino gaming revenue	R148 million
Casino gaming tax revenue	R12 million
Visitors	754 600
Provincial gaming tax base	

Taxable revenue (millions)	Rates of tax
	8.0%
(2% Development Trust)	

KIMBERLEY: FLAMINGO CASINO

Date opened	March 2002
Operator	Teemane (Pty) Ltd
Management company	Sun International Management Ltd
Total capital investment	R128 million
Employees	313
Permanent	139
Casual	0
Outsourced	174
Slots	228
Tables	9
Visitors	754 600

KURUMAN: LEITLHO RESORT AND ENTERTAINMENT WORLD

Date opened	Anticipated opening August 2008
Operator	Kgalagadi Casino Resort
Management company	Kgalagadi Casino Resort



Profile of South African Casinos by Province

WESTERN CAPE

Current number of casinos	5
Proposed number of casinos	5
Number of tables	92
Number of machines	2 915
Casino employees	3 503
Gross casino gaming revenue	R2 billion
Casino gaming tax revenue	R238 million
Visitors	8 901 673
Provincial gaming tax base	

Taxable revenue (millions)		Rates of tax
0 - 10		6.0%
10 - 20	R 600,000	8.5%
20 - 30	R1,45m +	11.0%
30 - 40	R2,25m +	13.0%
40 - 50	R3,83m +	15.0%
>50	R5,35m +	17.0%

CAPE TOWN: GRANDWEST

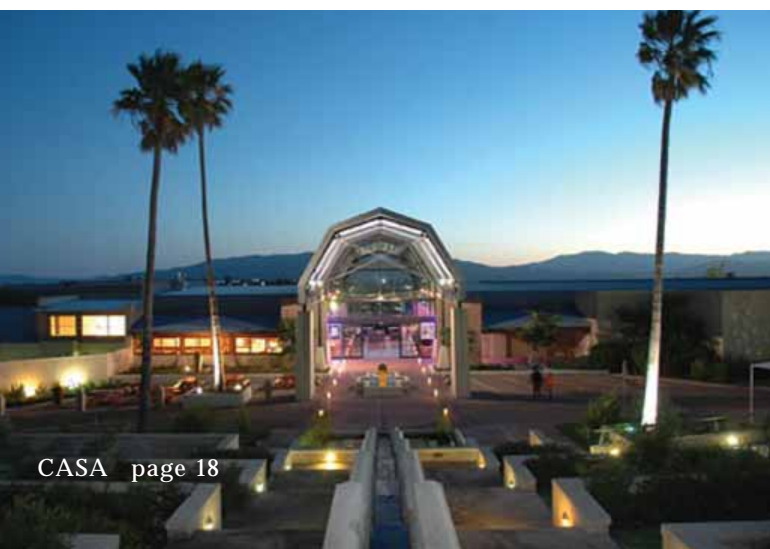
Date opened	December 2000
Operator	SunWest International (Pty) Ltd
Management company	Sun International Management Ltd
Total capital investment	R1.5 billion
Employees	1 919
Permanent	935
Casual	0
Outsourced	984
Slots	1 831
Tables	61
Visitors	6 382 000

CALEDON: CALEDON HOTEL, SPA AND CASINO

Date opened	November 2000
Operator	Century Casinos Caledon (Pty) Ltd
Management company	Century Casinos Africa (Pty) Ltd
Total capital investment	R151 million
Employees	276
Permanent	190
Casual	0
Outsourced	86
Slots	350
Tables	6
Visitors	929 271

LANGEBAAN: CASINO MYKONOS

Date opened	November 2000
Operator	West Coast Leisure (Pty) Ltd
Management company	Gold Reef Management (Pty) Ltd
Total capital investment	R66 million
Employees	270
Permanent	174
Casual	0
Outsourced	96
Slots	270
Tables	9
Visitors	945 254



MOSSEL BAY: GARDEN ROUTE CASINO

Date opened	December 2002
Operator	Garden Route Casino (Pty) Ltd
Management company	Gold Reef Management (Pty) Ltd
Total capital investment	R131 million
Employees	432
Permanent	220
Casual	0
Outsourced	212
Slots	264
Tables	16
Visitors	553 148



WORCESTER: THE GOLDEN VALLEY CASINO

Date opened	November 2006
Operator	Worcester Casino (Pty) Ltd
Management company	Sun International Management Ltd
Total capital investment	R150 million
Employees	606
Permanent	367
Casual	0
Outsourced	239
Slots	200
Tables	0
Visitors	92 000



Casino Company Profiles



Century Casinos Africa (Pty) Ltd

Century Casinos, Inc., an international casino entertainment company founded in 1993 in the US State of Delaware, owns or operates 20 casinos in USA, Canada, South Africa, the Czech Republic, Poland and aboard cruise ships. Century Casinos has been listed on the NASDAQ Capital Market since 1994 and on the Prime Market of the Vienna Stock Exchange since 2005.

The company owns and/or operates Womacks Casino and Hotel in Cripple Creek, Colorado; Century Casino and Hotel near Denver, Colorado; and Century Casino and Hotel in Edmonton, Canada. Through concession agreements, Century Casinos operates two casinos aboard the ultra-luxury Silversea cruise vessels, the World of ResidenSea and three casinos aboard Oceania's Cruises' vessels.

The company's Austrian subsidiary, Century Casinos Europe GmbH, owns and operates the Century Casino Millennium in the Marriott Hotel in Prague, Czech Republic; and holds a 33.3% ownership interest in Casinos Poland Ltd, the owner and operator of seven full casinos and one slot casino in international four- and five-star hotels in Poland. The company continues to pursue other international projects in various stages of development.

Through its subsidiary Century Casinos Africa (Pty) Limited, it owns and operates The Caledon Hotel, Spa and Casino near Cape Town, South Africa as well as 60% of, and provides technical casino services to, the Century Casino Newcastle, in Newcastle, South Africa.

Gold Reef Casino Resorts Ltd

Gold Reef Casino Resorts Ltd's interests incorporate Akani Egoli (Pty) Limited, which operates Gold Reef City Casino and Theme Park; West Coast Leisure (Pty) Limited, which operates Casino Mykonos; Akani Msunduzi (Pty) Limited, which operates the Golden Horse in Pietermaritzburg; Pinnacle Point Casino (Pty) Ltd, which operates the Garden Route Casino; Goldfields Casino and Entertainment Centre (Pty) Ltd, which operates Goldfields Casino in the Free State; and Silverstar Development Ltd which is currently developing the Silverstar Casino.

The Silverstar Casino, with 700 slot machines and 30 tables, holds the seventh and final casino license for Gauteng and is set to open in the first quarter of 2008.



London Clubs International

London Clubs International (LCI) has been publicly quoted on the London Stock Exchange since 1994. It has casinos in London, Egypt, Lebanon, and South Africa (Emerald Casino Resort in Vanderbijlpark). The group operates wholly-owned casinos in the United Kingdom and joint ventures and management contracts overseas.

In 2006, the company was acquired by US-based Harrah's, the world's largest casino owner and operator.

Peermont Global

Peermont Global was incorporated in May 1995 and changed its name from Global Resorts SA (Pty) Ltd to Peermont Global Limited in 2004. In April 2007, a BEE consortium led by the Mineworkers Investment Company (MIC) acquired a 75% control of Peermont Global (PGL) in a transaction valued at R7.3 billion.

Peermont is the holder of the second largest number of casino licences in South Africa, and owns and operates a total of 12 properties - nine in South Africa and three in Botswana. In addition to its flagship Emperors Palace Hotel, Casino and Convention Resort in Johannesburg, Peermont owns and manages the Graceland Hotel Casino and Country Club in Secunda, the new Frontier Inn and Casino in Bethlehem, and the Grand Palm Hotel Casino and Convention Resort in Gaborone, Botswana.

In 2006, Peermont acquired a controlling interest in the Tusk Casino Resorts and Hotels Group, which comprises gaming and hotel operations in the North West, Limpopo and KwaZulu-Natal provinces, including Tusk Mmabatho Casino Resort (Mafikeng), Tusk Rio Casino (Klerksdorp), Tusk Taung Hotel (Taung), Tusk Venda Casino Hotel (Thohoyandou) and Tusk Umfolozi Casino (Empangeni).

In September 2007, Peermont announced it was to develop a new casino, hotel and conference facility in Richards Bay at an expected cost of R220 million. This will entail the relocation of the Tusk Umfolozi Casino at Empangeni.



Casino Company Profiles



Sun International

Sun International was established in 1983 and listed on the Johannesburg Stock Exchange in 1985. The group's operations include resorts, luxury hotel products, and mass market casinos in 14 jurisdictions in South Africa, Zambia, Botswana, Namibia, Lesotho and Swaziland.

More than half of this portfolio has been developed in the last ten years, with new projects underway in the Middle East, Africa and South America.

Every day, over 50 000 customers from over 50 countries visit a Sun International property.

Over a period of three decades, the group has invested more than R14 billion in new tourism infrastructure. It employs over 8 000 people, has indirectly created 50 000 new employment opportunities in the broader tourism industry, and it has been estimated that its business has a direct impact on the livelihood of more than 500 000 people in southern Africa.

Sun International has casino licenses in eight of South Africa's nine provinces. The group operates 21 casinos in southern Africa, including 13 of the 34 casinos currently operating in South Africa. The group is the leading casino operator in the southern hemisphere and enjoys a 43% share of the South African casino market. Its newest property is the Golden Valley Casino in Worcester, which opened in November 2006.

Tsogo Sun

Tsogo Sun Gaming is one of two companies owned by Tsogo Sun Holdings, the other being Southern Sun Hotels. Tsogo Sun Holdings has a shareholding split between Tsogo Investments (51%) and SABMiller (49%).

Tsogo Sun Gaming incorporates five casino properties: Montecasino in Johannesburg, Suncoast Casino and Entertainment World in Durban, Hemingways in East London, the Ridge Casino and Entertainment Resort in Witbank and the Emnotweni Casino in Nelspruit.

Johnnic has a 9.7% effective interest in Tsogo Sun and a 30% effective interest in Tsogo Sun KwaZulu Natal through its holdings in gaming company Durban Add Ventures which owns and operates the Suncoast Casino and Entertainment World complex in Durban.

Corporate Social Investment



During the year under review, CASA members invested R56 million in corporate social investment spending. Some highlights of projects receiving support are:

With a total CSI spend of R13 608 449, **Peermont's** Emperors Palace was involved with a number of key educational projects in the Ekurhuleni metropolitan area, principally through the Thuthuka Education Initiative, a support programme for 100 East Rand and Vaal Triangle schools. In the year under review, over R8 million was contributed to this project.

The East Rand Children's Trust received R1 033 104 for use in its many projects which included the provision of after-school care for children at eight schools in Tembisa, Kathlehong and Vosloorus, the purchase of uniforms for orphans at the Sithabile Childrens Home in Daveyton, and the sponsorship of 300 learners from Tembisa, Daveyton, Duduza and Vosloorus who attended Star schools for extra tuition.

Another educational initiative, the East Rand Youth Trust, received R1 033 104 for study bursaries to candidates from disadvantaged backgrounds. Since its inception in 1997, the Trust has produced 22 graduates and currently has 67 students (31% of them female) enrolled in Gauteng universities and tertiary institutions, and 150 students at college.

Century Casinos Caledon made CSI donations and sponsorships to the value of R542 860, of which R500 000 went to the Overberg Community Trust for community development. The balance was distributed to various school projects in and around the Overberg district. Additional donations were made to the Caledon Ambulance Service, the Institute for the Blind and Deaf, the Overstrand Child and Youth Care Centre and the SA Red Cross Air Mercy Service.

Century Casinos Newcastle distributed sponsorships and donations to the value of R17 066 to a variety of charities, including a crisis centre and child welfare organisations.

Tsogo Sun's expenditure during 2007 focussed on children affected by HIV-AIDS. In keeping with this policy, R3.2 million was contributed to several children's homes for such projects as the building of security fencing and the provision of bedding and curtaining, the provision of school uniforms, books and other educational material and the flu vaccination of children.

Tsogo Sun also supported Business Against Crime through a contribution of R500 000 and allocated R2.8 million towards the development programmes of the Lions and Blue Bulls rugby associations, the KwaZulu-Natal Cricket Union and



Corporate Social Investment



the Sun Coast Pirates Lifesaving Club. Additionally, a golf tournament under the patronage of the Duke of Edinburgh raised R789 769 for a variety of charities.

Emerald Casino spent R924 000 in CSI.

In the **Gold Reef Group**, Gold Reef City sponsored entrance to its theme park for numerous underprivileged children throughout the year. Other charitable beneficiaries in 2007 included three schools in Soweto where soccer facilities were sponsored, the He'atid Leadership Education Programme, the Soweto Home for the Aged, Project Smile for the aged, the Breast Health Foundation and the Vincent Tshabalala Education Trust.



Major donations made by the Golden Horse Casino included those to an Educational Science Centre, the Careways Group - an organisation that provides counselling to people with HIV/AIDS, and CHOC - a centre for children afflicted with cancer. In addition the casino made donations to other beneficiaries such as Lifeline, the Pietermaritzburg and District Council for the Aged and KwaZulu-Natal Wildlife.

Mykonos Casino donated 5% of its audited pre-tax profits to the West Coast Community Trust (WWCT), which provides educational assistance to the local community. A recent initiative of the trust was the Fossil Park project, a joint venture with local primary schools, which exposes learners to a world-renowned heritage site and developed an activity handbook for scholars in three languages. Additional beneficiaries during the year included the Langebaan Animal Centre, the Sonskyn crèche and PLAY, a venture which raises funds to equip local parks.



The Garden Route Casino contributed to a local community trust which allocates funds to community projects such as AIDS hospices and recreational development programmes. The major projects of the Garden Route Casino Community Trust during 2007 were financial assistance to the Diaz Museum archaeological project, assistance with the completion of the Mossel Bay Child Welfare building, upgrading the outdated radio system of the local NSRI and supporting the upgrading of local underprivileged schools.

In terms of its temporary licence agreement, Goldfields Casino has committed to investing R1 million in community facility development within three years of opening. The resulting community trust made donations to the House of Joy (a home for abandoned children), Northern Free State Outreach (a training programme mainly for women) and the Lesedi Mohau Development Centre, which educates the unemployed, and the Cancer Association of South Africa.



Funded through a 2% allocation of annual after-tax profit, **Sun International's** total CSI spend for the 2007 financial year was R24 million. The greatest proportion of this went to health and welfare (40.9%) and education (22.9%) projects. 8.1% of total disbursements were allocated to sports, arts and culture projects. At a group level, CSI is primarily directed at national projects, organisations or charities that are of significance to the group as a whole, while unit-level CSI funding is directed at locally or regionally significant causes.

At the national level, principal beneficiaries were the Sports Trust, the Arts and Culture Trust, the National Sea Rescue Institute, the SA Paralympics team and the South African Chefs Association, which develops skills that are critical for the tourism sector, among other NGOs and beneficiaries.

Each Hollywood Slot Jackpot hit at individual casinos within the group results in a R500 contribution to Reach for a Dream, which assists hospitalised children and those who have life-threatening diseases.

At a regional level, some of Sun International's projects and sponsorships included the Tapologo AIDS Hospice in Rustenburg, which received more than R3 million, Ubuntu House, a place of safety for abandoned babies in the Western Cape, and the Mahatma Gandhi Crisis Centre in KwaZulu-Natal, which assists victims of abuse who are in need of counselling, support and treatment.

In the Western Cape, beneficiaries included Blisters for Bread, which feeds thousands of school children and the Khanya Project, a project undertaken in partnership with the Department of Education, which introduces disadvantaged learners to computers, information technology and e-learning.

In the Eastern Cape, the Mbizana Development Trust funded a satellite UNISA campus at the Wild Coast Sun resort, enabling a significant number of students - including Sun International employees - to have easy access to higher education closer to their homes and avoiding the need to travel to Durban.

Elsewhere, assistance was given to Bloemfontein Hospice, the Eziko Cooking Project and the Faranani hydroponic project, which creates sustainable farming jobs in Limpopo Province. Close to Sun City, the Pilanesburg Wildlife Trust funded improvements in wildlife management activities in the game reserve. At this location, the local community also benefits from a percentage of the gate-takings - a contribution which facilitates socio-economic development through job creation and poverty alleviation.

Corporate Social Investment



Two major projects in Limpopo were the Limpopo Youth Orchestra and the Sentahle Home-Based Care Centre, which provides the community of Ga-Maja with a single point of access to various services including government grants, support for HIV-AIDS patients and training for care-givers.

In neighbouring countries, Sun International's CSI initiatives in Botswana included the Tsholofelong refuge for street children and the Kamogelo orphanage in Mogoditshane. In Namibia, the Mount Sinai Centre assists HIV-positive mothers by providing formula milk and food hampers, while the Beautiful Gate Home in Lesotho is a new medical facility for the treatment of HIV-AIDS and other diseases. In Swaziland, the Royal Swazi Sun in Ezulwini provided food to orphans and vulnerable children in the local community and conducted community cleaning campaigns in the area to encourage care for the environment.

Sun International's properties in Zambia continued to play a key role in meeting various needs of the community. Over and above other sustainable projects that have been in place for some time - including the hydroponic farm - a library was built and equipped at the Mukuni Basic School and the school fees of 40 pupils from the Lubasi orphanage were sponsored in full.



CASA Code of Conduct



CASA and its members are committed to making responsible gambling an integral part of our daily operations at all our casinos throughout South Africa. To advance this goal, CASA members have agreed on a code of conduct which details how we fulfil this pledge.

The following are the relevant sections of the code:

COMMITMENT TO OUR CUSTOMERS

Responsible Gambling

- CASA members will make available brochures regarding responsible gambling and where to find assistance. These will be available and visible in gaming areas.
- CASA members will make available on their web sites information regarding responsible gambling and where to find professional help.
- CASA members will display in gaming areas signage bearing a toll-free problem gambling counselling line.
- CASA members will provide opportunities for customers to request in writing that they not be sent promotional mailings and for revocation of their privileges for specific casino services such as loyalty card promotions. In addition, each CASA member shall make reasonable efforts to honour a written request from any person that it not knowingly grant that person access to gaming activities at one or more of its properties.
- CASA members reserve the right to exclude a patron from gaming, without a request from the patron.

Underage Gambling and Unattended Children in Casinos

- CASA members will make diligent efforts to prevent children from loitering in the gaming area of a casino.
- CASA members will communicate the legal age to gamble through appropriate signage and/or brochures.
- Employees working in relevant areas will receive training in appropriate procedures for dealing with unattended children, underage gambling, and the purchase and consumption of alcohol and tobacco by underage persons.
- Where, in the opinion of management, an unaccompanied child on the complex appears to be at risk, appropriate personnel will be contacted and remain with the child while reasonable steps are taken to locate the parent or responsible adult on property or by telephone. If efforts are unsuccessful, the unaccompanied child will be released to the care of an appropriate third party.

Alcohol

- CASA members will observe a responsible beverage service policy and not knowingly serve alcoholic beverages to an underage person.



CASA Code of Conduct



Responsible Advertising

This code applies to the advertising and marketing of casino gaming by CASA member companies. It does not pertain to advertising and marketing that is primarily of hotels, restaurants and entertainment that are often associated with or operated by casinos. For the purposes of this code, and as reflected in the national regulations, advertising and marketing include radio and television ads broadcast off the premises, print, brochures, direct mail, billboard and internet promotions.

All casino advertising and marketing will:

- Be consistent with principles of dignity and integrity and subject to the jurisdictions in which it operates.
- Contain the NRGP's responsible gambling message and the NRGP's toll-free problem gambling counselling line.
- Reflect generally accepted contemporary standards of good taste.
- Make no false or misleading claims.

Casino advertising and marketing materials will not:

- Degrade the image or status of persons of any ethnic or religious group or affiliation.
- Feature anyone who is or appears to be below the legal age participating in gaming.
- Contain claims or representations that gaming will guarantee an individual's social, financial or personal success.
- Exhort gaming as a means of covering past financial losses.
- Be placed in media where most of the audience is reasonably expected to be below the legal age to participate in gaming.
- Imply or suggest any illegal activity of any kind.
- Be placed in media specifically oriented to children.
- Be placed at any venue where most of the audience is normally expected to be below the legal age to participate in gaming.

COMMITMENT TO THE PUBLIC



Funding the NRGP

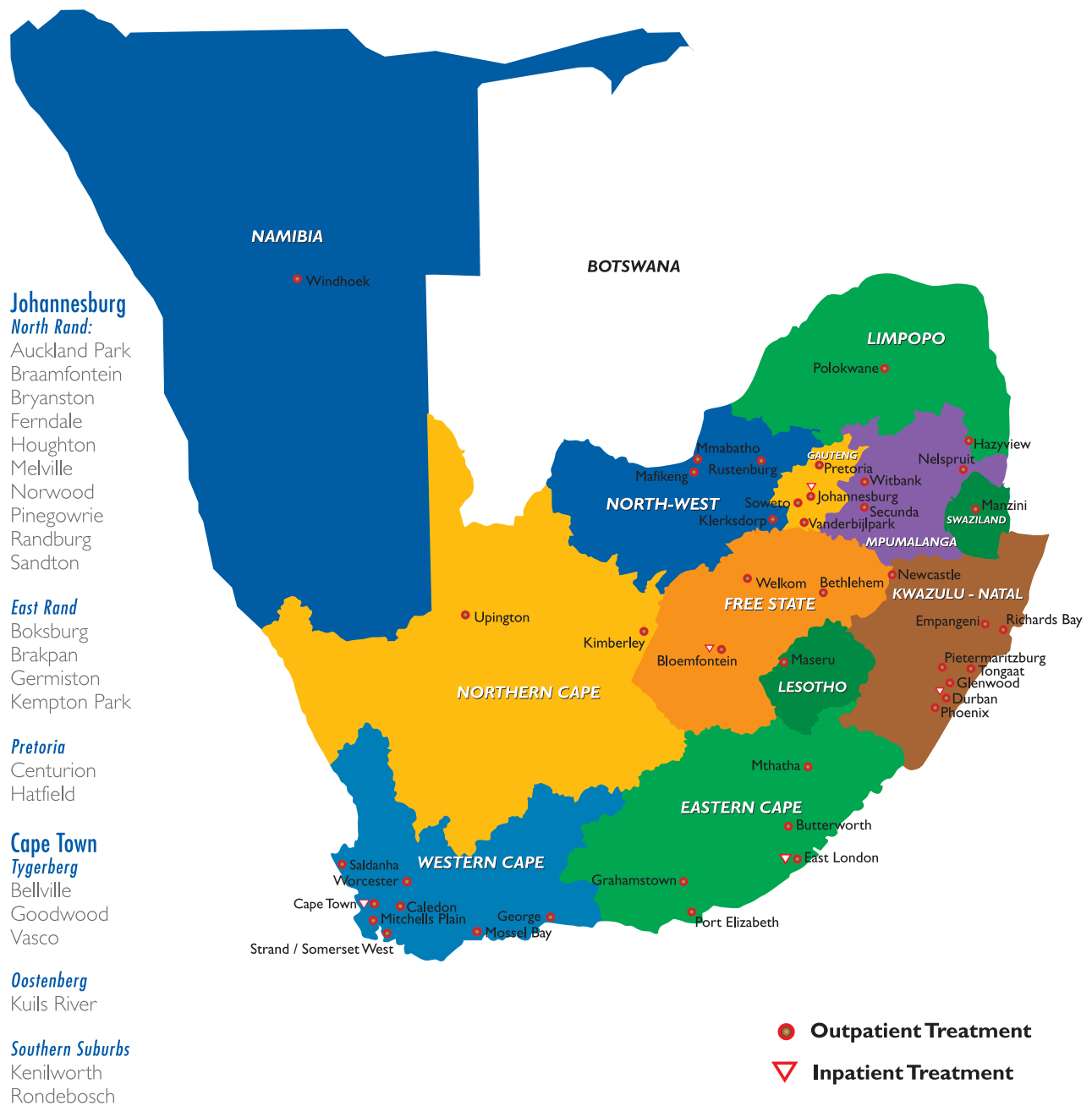
- In terms of agreements reached at the SA Advisory Council on Responsible Gambling (SARGT), CASA members will continue to provide funding for the National Responsible Gambling Programme (NRGP)
- CASA members will use this research to identify the best practices for casinos to follow in order to promote responsible gambling.



Winners know when to stop.
Problem Gambling Counselling Line | 0800 006 008



NRGP Treatment Centres



Regulatory Authorities in South Africa

National Gambling Board of South Africa

Block G, Ground Floor
Mapungubwe Building
77 Meintjies Street
Sunnyside
Pretoria 0002

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Hatfield 0028

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Fax: +27 (0)12 394 0831
E-mail: info@ngb.org.za
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South African Regulators Forum

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akexk@compcom.co.za

Eastern Cape Gambling and Betting Board

ECGBB Building, Quenera Park
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Tel: +27 (0) 43 702 8300
Fax: +27 (0) 43 748 2218
nwabisam@ecgbb.co.za
www.ecgbb.co.za

Free State Gambling and Racing Board

190 Nelson Mandela Drive
Westdene
Bloemfontein 9301

PO Box 9229
Bloemfontein 9300

Tel: +27 (0) 51 404 0300
Fax: +27 (0) 51 404 0322
ratsomm@fsgb.co.za
www.fsgb.co.za

Gauteng Gambling Board

1256 Heuwel Avenue
Centurion 0157

Private Bag X125
Centurion 0046

Tel: +27 (0) 12 663 8900
Fax: +27 (0) 12 663 8588
info@ggb.org.za
www.ggb.org.za

KwaZulu-Natal Gambling Board

Natalia
330 Longmarket Street
Pietermaritzburg
KwaZulu-Natal 3201

Private Bag X9102
Pietermaritzburg
KwaZulu-Natal 3200

Tel: 27 (0) 33 345 2714
Fax: 27 (0) 33 342 7853
info@kzngambling.co.za
www.kzngambling.co.za

Limpopo Gambling Board

22 Schoeman Street
Polokwane 0700

Private Bag X9520
Polokwane 0699

Tel: +27 (0) 15 295 5581
Fax: +27 (0) 15 295 3566
ceo@lgb.co.za
www.lgb.co.za

Mpumalanga Gambling Board

First Avenue
White River
Mpumalanga Province 1240

Private Bag X9908
White River
Mpumalanga Province 1240

Tel: +27 (0) 13 750 8000
Fax: +27 (0) 13 750 8099
ceo@mgb.org.za
www.mgb.org.za

Northern Cape Gambling and Racing Board

2 Harrison Street
De Beers
Kimberley 8300

Private Bag X6108
Kimberley 8301

Tel: +27 (0) 53 832 0490
Fax: +27 (0) 53 832 3039
pgaoboihi@met.ncape.gov.za

North West Gambling Board

3rd Floor East Gallery
MegaCity Shopping Complex
Sekame Road
Mmabatho 2735

Private Bag X34
Mmabatho 2735

Tel: +27 (0) 18 384 7491
Fax: +27 (0) 18 384 0039
info@nwgb.co.za
www.nwgb.co.za

Western Cape Gambling and Racing Board

Seafare House
68 Orange Street
Gardens
Cape Town 8001

P.O. Box 8175
Roggebaai 8012

Tel: +27 (0) 21 480 7400
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SA Bureau of Standards

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Responsible Gambling Structures

South African Responsible Gambling Trust

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Mr Chris Fisser (Vice-Chairperson)

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National Responsible Gambling Programme / SARGF

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