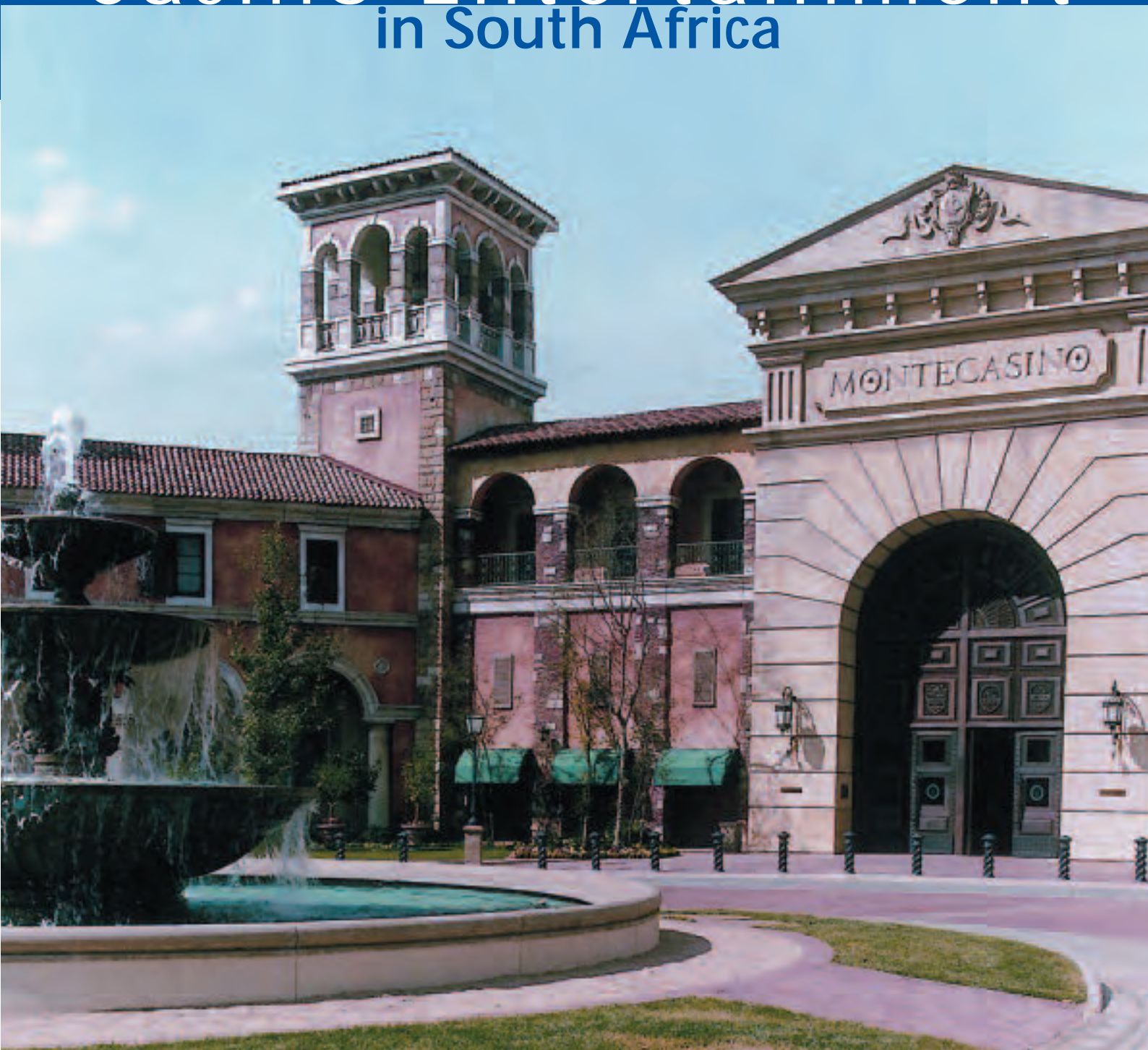




Casino Association of South Africa

The 2004/5 Survey of Casino Entertainment in South Africa



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Foreword Peter Bacon, Chairman



It is a pleasure for me to contribute the foreword to CASA's second national survey of the South African casino entertainment industry.

In just seven years this new industry has been responsible for more than R12-billion in new investment in all nine provinces, adding more than R36-billion to GDP in terms of economic multipliers. We have created almost 100 000 direct and indirect jobs and our sector last year accounted for more than R1.3-billion in provincial gaming taxes and VAT which, together with company tax, contributed more than R1.7-billion to government revenue.

It is thus a significant industry by any yardstick, and in particular, it is a key component of South Africa's tourism and leisure industry. In recent years, CASA members have invested heavily in infrastructure and tourism plant, including two new international convention centres, and over 5 000 new hotel rooms, for example, and it is widely recognised that the casino sector has considerably advanced transformation, and a new order in the management and ownership of assets in southern Africa's tourism and leisure industry.

CASA's first national survey, published in 2003, provided policy makers, researchers, academia, regulators, and the media, among other stakeholders, with the first-ever knowledge data bank of key statistics in respect of South Africa's new casino industry. It was very well received as a helpful and accurate resource document for those wanting to know more about the contribution of our industry to the socio-economic development of our country, and also about South African public opinion on the subject of casino gaming.

The second survey follows a similar format and includes 2004 statistics on the industry's economic contributions at both the national and provincial level, including data on employment and tax revenues. Also included are the results of independent surveys on South Africans' perceptions of casino entertainment, along with data on customer profiles, including visitors' trends and information on the general composition of the gaming population.

This past year saw the approval by parliament of a new legislative framework for the gambling industry, and one hopes that the information made available by CASA in its first survey assisted decision-makers, the media and the general public in the debate surrounding, and evolution of, the new legislation.

CASA's reaction to the new National Gambling Act is contained in this survey as editorial.

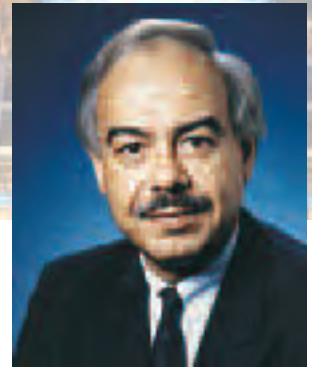
CASA has also recently agreed a ground-breaking Code of Conduct for responsible gambling to which all members have pledged themselves. This social protocol will further entrench the culture of responsible gambling which CASA promotes at all its casinos.

I trust you will find the 2004/5 edition of this survey both useful and interesting. For our part, we at CASA take the view that all the industry's stakeholders should have full access to the facts and figures about casino gaming, believing that freely available information such as this plays a constructive and positive role in the development of good public policy and good governance in respect of the casino industry.

Should you need further information about our industry, or CASA and its activities, please visit our website (www.casasa.org.za) or contact our national office by e-mail (info@casasa.org.za) or phone +27 21 409 2460.

A handwritten signature in blue ink, which appears to read 'P. Bacon'.

Derek Auret, Chief Executive



The Casino Association of South Africa is pleased to present the 2004/5 Survey of Casino Entertainment in South Africa, the second of what will be a regular report on the state and impact of this sector of South Africa's gambling industry.

It is important, if we are to present our case on the basis of reliable data, that the industry should provide regular updates about the contributions of the gaming industry to provincial and local economies, as well as its impact on a national scale.

This survey therefore gathers data showing the economic impact of casinos — the millions of rands which are generated in tax revenue, the thousands of jobs created, the millions of rands in salaries paid and the tens of thousands of visitors brought into our communities. The information in this survey, if read in conjunction with the National Responsible Gambling Programme's national study of problem gambling in South Africa, also helps to combat the many gambling myths and misconceptions that beset our society.

But these statistics only tell part of the story. Research demonstrates the fact that, after almost a decade of legalised casino gambling, the public acceptability of such recreational activity is high. It shows that most South Africans recognise

the benefits that casinos bring. And it shows that a majority of South Africans acknowledges that we are doing a good job operating safe and scrupulous gaming opportunities and that we are serious about our declared intention to combat problem (particularly under-age) gambling and promote responsible gaming. These are important points, countering the small but vocal opposition that persists in distorting the facts about our business.

Our industry has become part of the economic fabric of communities throughout the country, and the 2004/5 Survey documents the nature of this impact. We hope it will serve as a valuable reference tool for the facts about casino gaming.

A handwritten signature in blue ink that reads "Derek Auret". The signature is written in a cursive style and is underlined.





Executive Summary



The year under review saw the enactment of the new National Gambling Act. CASA, on behalf of the industry, made comprehensive representations to the parliamentary portfolio committee on the draft bill and most of our submissions were incorporated into the final legislation.

CASA also contributed to the formulation of the regulations in terms of the Act, which dealt with excluded persons, minimum requirements for advertising material and responsible gambling messages, the extension of credit, standards for gambling premises, and the registration and certification of machines and devices.

In just seven years the South African casino industry, which today has some 20 000 slot machines, has been responsible for about R12-billion in new investment that has added more than R36-billion to GDP in terms of economic multipliers. It has created almost 100 000 direct and indirect jobs and in 2003/4 alone it accounted for nearly R1.3-billion in provincial gaming taxes and VAT which, together with company tax, contributed more than R1.7-billion to government revenue.

In the financial year ended 31 March 2004, national casino tax revenues totalled R763.7-million. For the same period, gross gambling revenue for all nine provinces amounted to R8.2-billion. In the overall South African gambling market, the casino sector enjoys the largest share with 89.1% of total revenues, followed by the horse-racing sector at 10.6%.

The casino sector has also substantially advanced transformation in the tourism and leisure industry. On average, 60% of voting control in the casino industry is held by previously disadvantaged shareholders, as is a 38% effective economic interest. Fulfilment of our black economic empowerment obligations through recruiting, procurement and outsourcing is audited regularly by the authorities. As a consequence of the new regulatory environment in the country after 1996, casinos are subject to tight controls in terms of player protection, the exclusion of minors, probity standards and other compliance measures, including industry's substantial funding of the National Responsible Gambling Programme.

During 2004 the National Responsible Gambling Programme published its second major research report on gambling and problem gambling behaviour in South Africa. The report found that gambling overall has grown, with the number of people who never gamble having dropped from 25.6% to 20.1%. Growth has come principally from the lottery: the number of people who play the lottery regularly was 67.6% and is now 72.3%. The number of people who play slots has grown somewhat overall (28.9% to 31.1%) but the number who play slots regularly has declined (19.2% to 14.1%).



A New Legislative Environment



THE NATIONAL GAMBLING ACT

The new National Gambling Act was gazetted on 12 August 2004 and came into operation on 1 November 2004.

The objective of the Act is “to provide for the co-ordination of concurrent national and provincial legislative competence over matters relating to casinos, racing, gambling and wagering, and to provide for the continued regulation of those matters; for that purpose to establish certain uniform norms and standards applicable to national and provincial regulation and licensing of certain gambling activities; to provide for the creation of additional uniform norms and standards applicable throughout the Republic; to retain the National Gambling Board; to establish the National Gambling Policy Council; to repeal the National Gambling Act, 1996; and to provide for matters incidental thereto.”

The Act contains a significant extension of regulatory oversight functions for the National Gambling Board and introduced a number of measures aimed at addressing the incidence of problem gambling.

The Act provides for:

- the protection of minors;
- restrictions on granting credit to gamblers;
- self-exclusion from gambling activity by individuals;
- restrictions on advertising and the promotion of gambling activities and the granting of promotional discounts;
- the enforceability of gambling debts.

Provision is made for the registration and certification of gambling machines and devices, and for the establishment of a national central electronic monitoring system. There are also provisions for the licensing of persons employed in the gambling industry.

Part D of the Act stipulates licensing norms and standards. These are augmented in Part E, which provides for the consideration of economic and social development issues (including black economic empowerment and combating the incidence of addictive and compulsive gambling), and competition issues.

Provision is made for the establishment of a National Gambling Policy Council and a National Gambling Board.

In terms of the Act, cautionary notices will have to be posted on licensed premises and on gambling advertisements. The use of credit is banned, as is the placement of ATMs on casino gambling floors.

CASA, on behalf of the industry, was able to make submissions and representations to the Department of Trade and Industry, the Portfolio Committee on Trade and Industry and the National Council of Provinces on the draft Bill, and most of its submissions were incorporated into the Act.





Thoughts on the National Gambling Act from an Industry Perspective

The legalisation of gambling by the Government in 1996 through the passage of the National Gambling Act of that year highlighted two important changes in Government thinking.

Firstly, that gambling was a leisure activity that was considered to be desirable by a significant percentage of the population of South Africa and that as a free and democratic country its citizens should enjoy the right to choose whether or not they wished to participate in this form of entertainment. Secondly, that the significant number of illegal gambling operations in any event provided that form of entertainment to large numbers of people but that the continuation of such operations – which criminalised participants when caught – was undesirable for a number of reasons: as recently as 1995, there were about 150 000 illegal slot machines in South Africa, paying no tax, employing few people and providing a platform for associated criminal behaviour such as prostitution and the narcotics trade. Moreover, this vast illegal industry was almost entirely controlled by whites, offered players no protection against fraud, was accessible to minors, and ignored problems associated with compulsive gambling.

The 1996 Act thus recognised the maturity of the individual in South African society to decide for him/herself and to provide freedom of choice and to eliminate widespread illegal gambling and its harmful consequences. Following the adoption of the Act, its implementation brought into being a number of regulatory authorities, a structure of provisions that would make the industry the most highly regulated economic sector in the country and the establishment of casinos that are recognised as some of the best operated in the world. For its part, those companies that obtained licenses to operate casinos in turn presented the country with significant job creation and new revenue in the form of taxes and levies, tourism and other infrastructure, and, perhaps most significantly, with a system to address problem gambling. This initiative has evolved into a comprehensive government/private sector programme that is recognised worldwide as being a leader in its field and has been implemented also in other international jurisdictions.

By its very nature, gambling in some sectors of society remains a controversial issue, although independent research commissioned by the National Gambling Board shows that 73%

of South Africans believe gaming is acceptable, and 89% do not have a moral, philosophical or religious objection to this form of entertainment. About one in eight South Africans (12.2%) are opposed to gaming, while the rest may choose not to gamble, but have no objection if others do so.

Despite the exemplary conduct of the South African casino operators, there has thus been some criticism accompanying the advent of this newly legalised form of entertainment. In this regard it is significant to note that despite the best efforts of the industry to contain and address the possible harmful effects of gambling, its detractors relied heavily on anecdotal evidence to attempt to discredit this form of leisure activity and to introduce measures to circumscribe it for social reasons.

The impact of the objections of this relatively small, but persistent, sector of society ultimately gave rise, early in 2004, to proposals to revise the 1996 Act. The initial drafts of the Bill were not made available to the industry and it was only when it had reached its 11th draft that operators were finally given the opportunity to comment on its provisions. In the event, that which was being proposed would result in a reduction of the operating level of the industry, a large number of job losses and a significant reduction in revenue, as was later demonstrated, but would not have eliminated the choice that citizens had to exercise their right to choose their leisure activity.

The Act that was finally adopted has added a number of new measures to an already long list of compliance provisions that is required of the industry and with which it scrupulously complies. These relate in the main to provisions regarding the exclusion of individuals from casinos, the positioning of ATMs within properties, signage directing persons who visit a casino away from areas where gambling actually takes place (although why persons would visit a casino if they object to seeing gambling devices has never been explained) and advertising.

A number of the difficulties arose with the process leading up to the final Act. Among these was the fact that the various drafts of the Bill had not been evidenced-based, that no research had been conducted into international best practice



or the insights of experts in the field into the areas that it sought to address, and that industry had not been consulted or given the opportunity to comment on the proposed provisions until a very late stage.

At that point industry, which has throughout recognised the need for regulation, and has co-operated extensively with all regulatory agencies throughout its operational life, engaged Government to create a better understanding of the consequences that the adoption of the Bill would have on economic activity that had been established over a period of six years.

It is worth noting – and this was put to government - that the casino industry in South Africa was already, at the time of the new Bill, a rigorously and effectively regulated legal industry that contributed substantially to the public purse and which had extensively funded public infrastructure, including new tourism plant, such as convention centres and more than 5 000 hotel beds.

In just six years our new casino industry, which today has some 20 000 slot machines, has been responsible for about R12-billion in new investment that has added more than R36-billion to GDP in terms of economic multipliers.

It has created almost 100 000 direct and indirect jobs and in 2003/4 alone it accounted for nearly R1.3-billion in provincial gaming taxes and VAT which, together with company tax, contributed more than R1.7-billion to government revenue.

It has also substantially advanced transformation in the tourism and leisure industry. On average, 60% of voting control in the casino industry is held by previously

disadvantaged shareholders, as is a 38% effective economic interest. Fulfilment of our black economic empowerment obligations through recruiting, procurement and outsourcing is audited regularly by the authorities. As a consequence of the new regulatory environment in the country after 1996, casinos are subject to tight controls in terms of player protection, the exclusion of minors, probity standards and other compliance measures, including industry's substantial funding of the National Responsible Gambling Programme.

The Act, subsequently passed, has added another layer of regulation to the already rigorous conditions under which the casino industry operates. As already indicated, industry does not quarrel with the need for regulation and, as its track record over the past number of years clearly indicates, has complied in every respect with imposed conditions. It recognises that gambling can create problems for a small number of people and has redoubled its training and preventative measures to address this issue.

Industry also acknowledges the co-operative spirit that characterised discussions leading up to the final draft that was ultimately adopted.

Industry however, through its proven positive economic contribution, also considers itself to be an important part of the economic fabric of South Africa. It thus despairs when proposed actions against the industry hinge on personal whims and anecdotal examples presented by the opponents of gaming as the norm. For its part, industry will continue to live up to its enviable reputation as a contributory and ethical corporate citizen. Its view is undeniably that, as far as the regulatory environment is concerned, Government has gotten it right.

It is only through consultation, research and regular interaction between all stakeholders that the industry will be able to continue to present gambling for what it ought be: a form of entertainment that can be enjoyed by all.

The National Gambling Regulations

On 13 September 2004 the Department of Trade and Industry, in terms of the Act, published the National Gambling Regulations for comment. The regulations were formally promulgated on 15 November 2004.

The regulations contain provisions dealing with excluded persons, minimum requirements for advertising material and responsible gambling messages, the extension of credit, standards for gambling premises, and the registration and certification of machines and devices.



Code of Conduct

A Social Contract with the People of South Africa



The Casino Association of South Africa (CASA) was founded in 2003 with the aim of creating a better understanding of casino entertainment by bringing the facts about the industry to the general public, the media, public representatives, regulators, and policy and other decision makers through education and advocacy.

CASA represents South Africa's licensed casino industry. In just eight years this new industry has been responsible for more than R12-billion in new investment in all nine provinces, adding more than R36-billion to GDP in terms of economic multipliers. The industry has created almost 100 000 direct and indirect jobs and in 2002/2003 alone, accounted for nearly R1.3-billion in provincial gaming taxes and VAT which, together with company tax, contributed more than R1.7-billion to government revenue. In addition, the casino industry has substantially advanced transformation in the tourism and leisure sector.

CASA's members are employers, property owners and taxpayers and place the highest priority on the obligations of corporate citizenship and social responsibility.

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.

Commitment To Our Employees

- CASA members will educate new employees on responsible gambling.
- CASA members will train employees in respect of responsible gambling and provide periodic refresher training.
- CASA members will implement communications programmes for employees to improve their understanding of responsible gambling and related policies and procedures.
- CASA members will make available to new employees brochures regarding responsible gambling and where to find assistance.
- CASA members will post responsible gambling awareness signage bearing a toll-free helpline number at various locations where employees congregate.





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 helpline number.
- 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 the 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.

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 NRGPs responsible gambling message and the NRGPs toll-free helpline number.
 - 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 NRGF

- In terms of agreements reached at the SA Advisory Council on Responsible Gambling (SAACREG), 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 to promote responsible gambling.

Commitment on Money Lending

- CASA recognises that some money lending practices could be harmful.
- CASA will strive to deter the practice of illegal money lending ("money lending") at casino properties.

- Casinos will take reasonable measures to discourage money lending which will include the following:
 - Placing appropriate warning notices in the casino
 - Investigating any complaints or incidents of suspected money lending
 - Co-operating fully with any investigation regarding money lending by any relevant authority
- Should there be factual proof supporting a suspicion of a money lending transaction, the casino will take the appropriate action, taking into account all the circumstances surrounding the incident.
- Casinos will forward appropriate details of the evidence and any action against an alleged moneylender to all other CASA affiliated casinos.

All aspects of CASA's Code of Conduct are subject to provincial and national regulations and statutes.

Enacted on 1 August 2005, by the CASA Board of Directors.



Overview of Casino Entertainment

Casino Locations

Eastern Cape

Port Elizabeth: The Boardwalk
East London: Hemingways
Bizana: Wild Coast Sun

Free State

Thaba'Nchu: Thaba'Nchu Sun
Thaba'Nchu: Naledi Sun
Welkom: Goldfields Casino

Gauteng

Fourways: Montecasino
Johannesburg: Gold Reef City
Vanderbijlpark: Emerald Casino Resort
Kempton Park: Emperors Palace
Brakpan: Carnival City

KwaZulu-Natal

Durban: Suncoast
Durban: Sibaya
Richards Bay: Tusk Umfolozi
Newcastle: Monte Vista
Pietermaritzburg: Golden Horse Casino

Limpopo

Polokwane: Meropa
Thohoyandou: Tusk Venda

Mpumalanga

Witbank: The Ridge
Secunda: Graceland
Nelspruit: Emnotweni Casino

Northern Cape

Kimberley: Flamingo Casino
Upington: Desert Palace¹

North-West

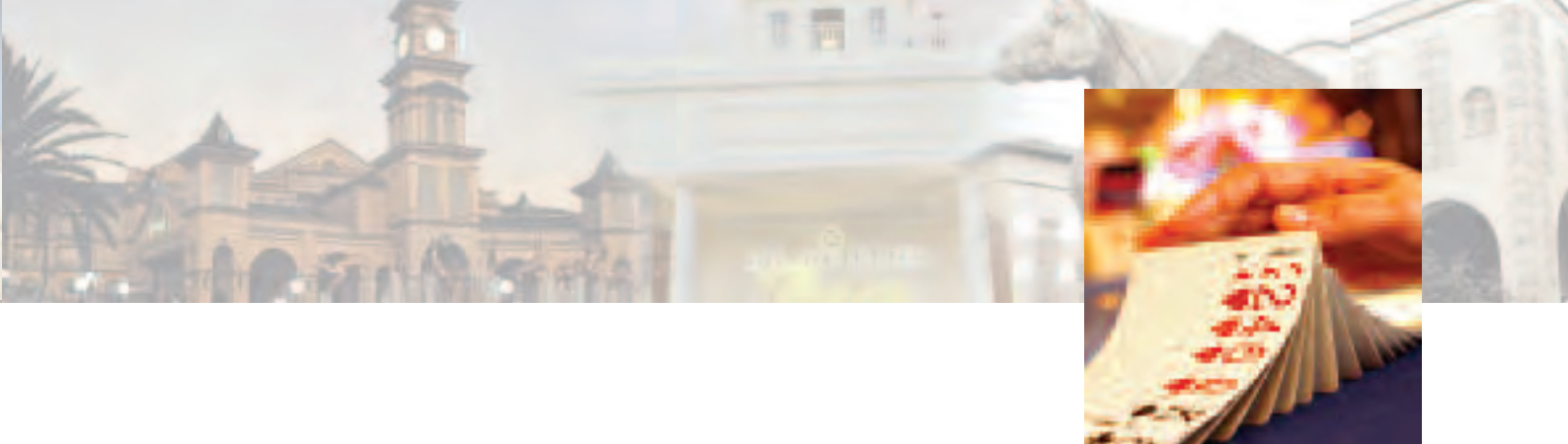
Pilanesberg: Sun City
Mabopane: Morula Sun
Hammanskraal: The Carousel
Klerksdorp: Tusk Rio
Mmabatho: Tusk Mmabatho

Western Cape

Cape Town: GrandWest
Caledon: Caledon Casino, Hotel & Spa
Langebaan: Casino Mykonos
Mossel Bay: Garden Route Casino

¹ Not a member of CASA





Casino Groups Holding Licenses in South Africa

	Sun International	Peermont Global	Century Casinos	London Clubs	Tusk Resorts International	Balele Leisure	Tsogo Sun	Gold Reef	Desert Palace
Eastern Cape	2						1		
Free State	2							1	
Gauteng	1	1		1			1	1	
KwaZulu-Natal	1				1	1	1	1	
Limpopo	1				1				
Mpumalanga		1					2		
North-West	3				2				
Northern Cape	1								1
Western Cape	1		1					2	
Total	12	2	1	1	4	1	5	5	1

The Market

SOUTH AFRICAN GAMING MARKET REVENUES* (R million)

The casino sector enjoys the largest share with 89.1% of total revenues, followed by the horse-racing sector at 10.6%.

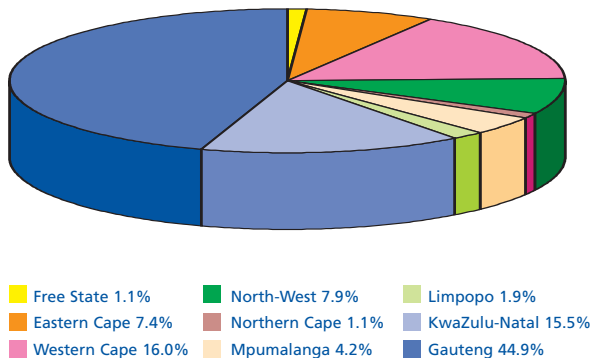
Sector	Year ended 31 March 2004	Year ended 31 March 2003	% Increase
Casino	7 339	6 240	18
Horse-Racing	860	694	24
LPMs	10	-	-
Bingo and Sports	30	20	50
Total	8 240	6 954	

*Figures exclude the National Lottery



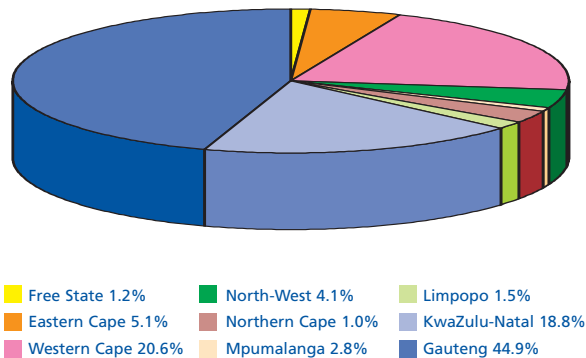
Overview of Casino Entertainment

Gross gambling revenue per province - all modes
(Financial year ended 31 March 2004)



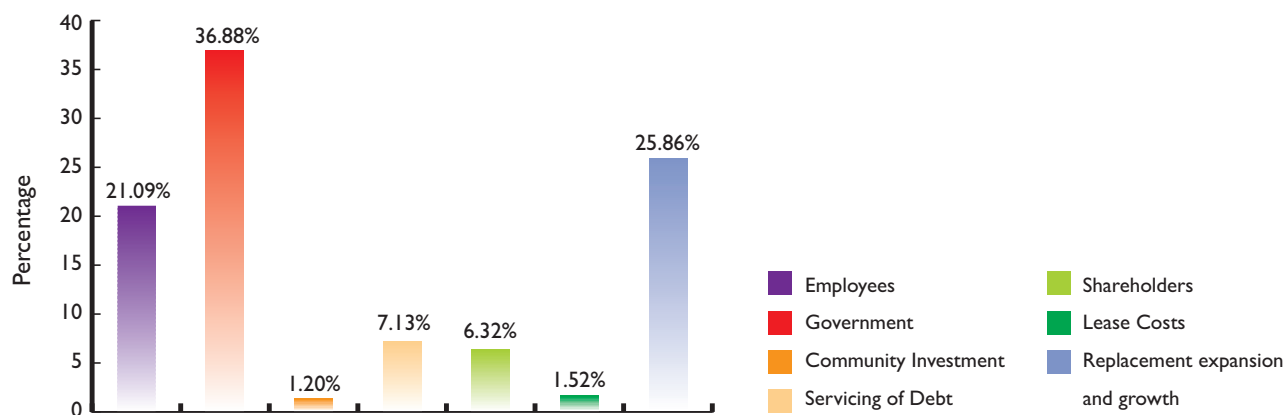
TOTAL: R8 240,2-MILLION

Gambling tax levy collected per province - all modes
(Financial year ended 31 March 2004)



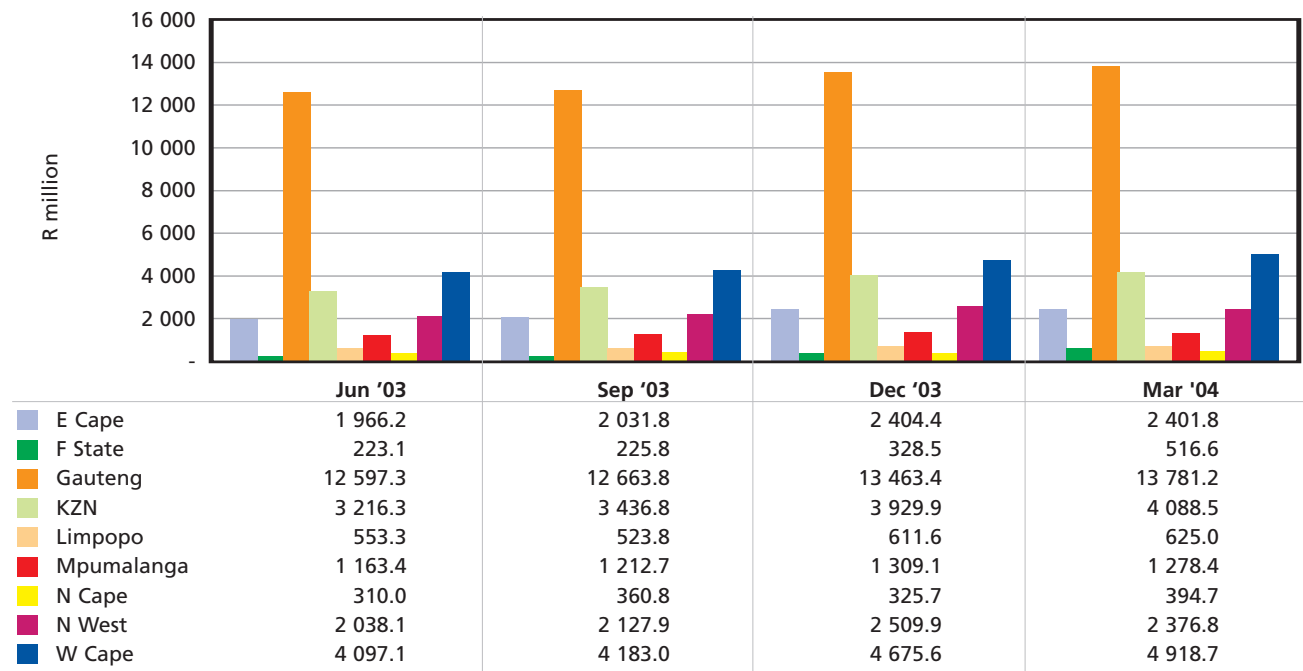
TOTAL: R763,7-MILLION

Casino Industry Value Added Statement: 2004: Where the Money Goes

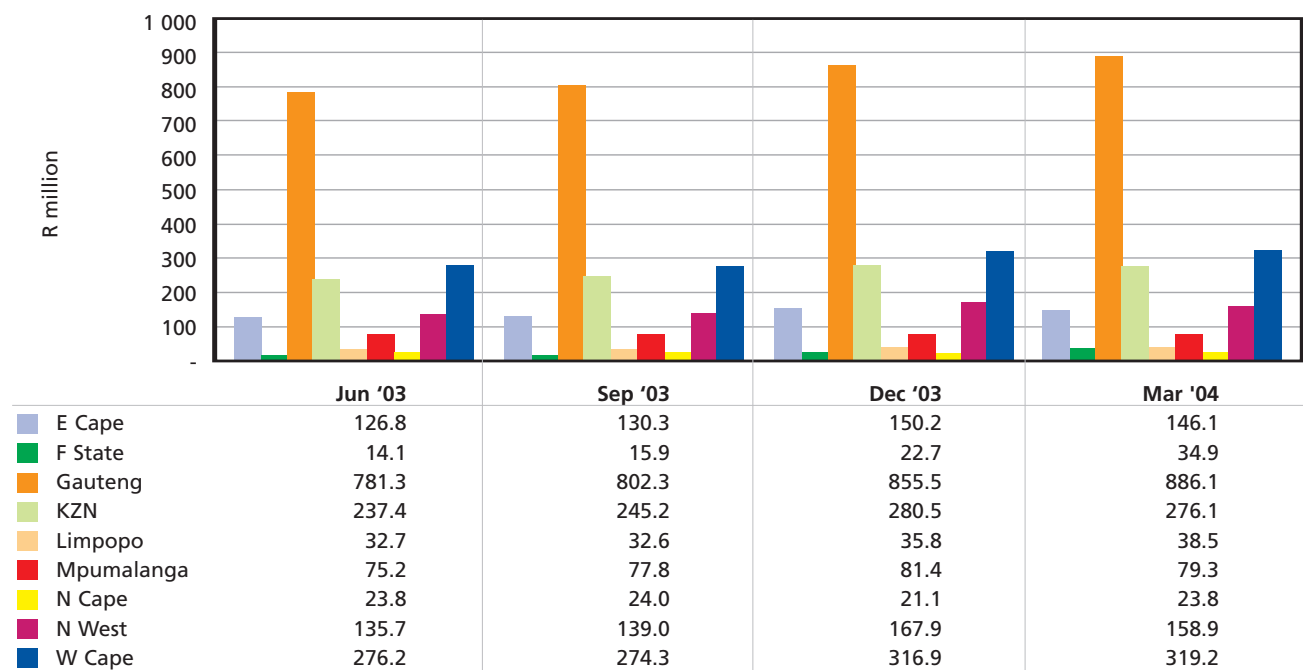




Quarterly Casino Turnover

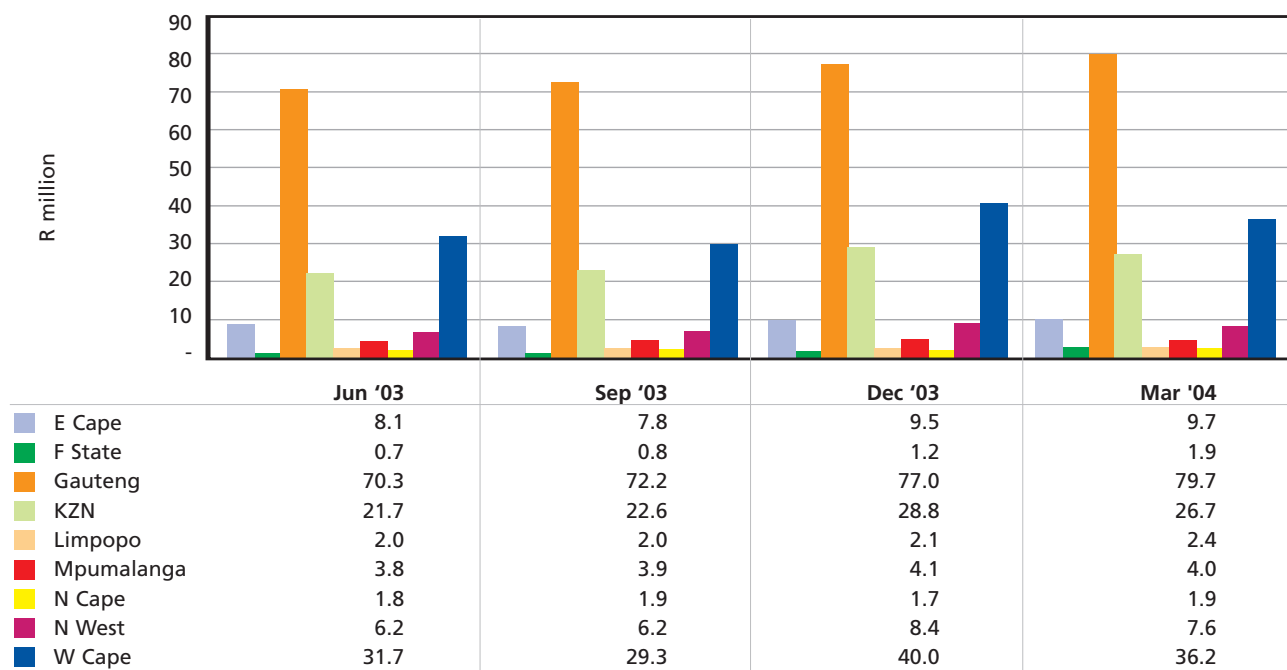


Quarterly Casino Gross Gambling Revenue

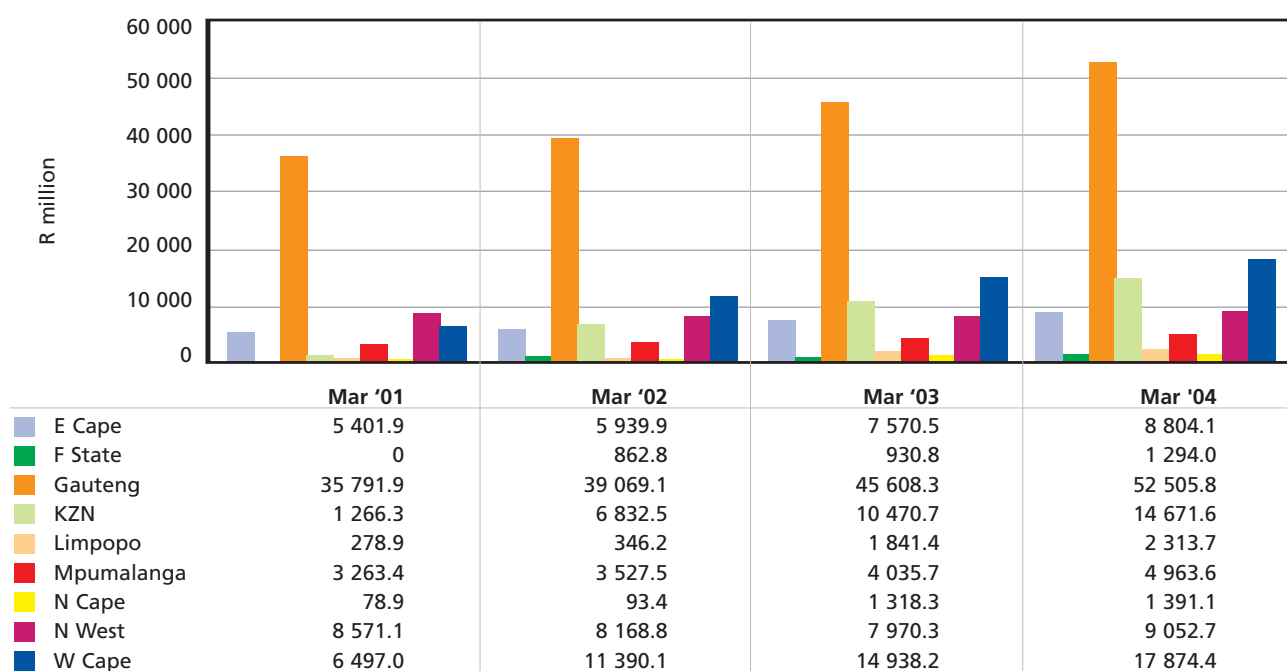




Quarterly Casino Tax

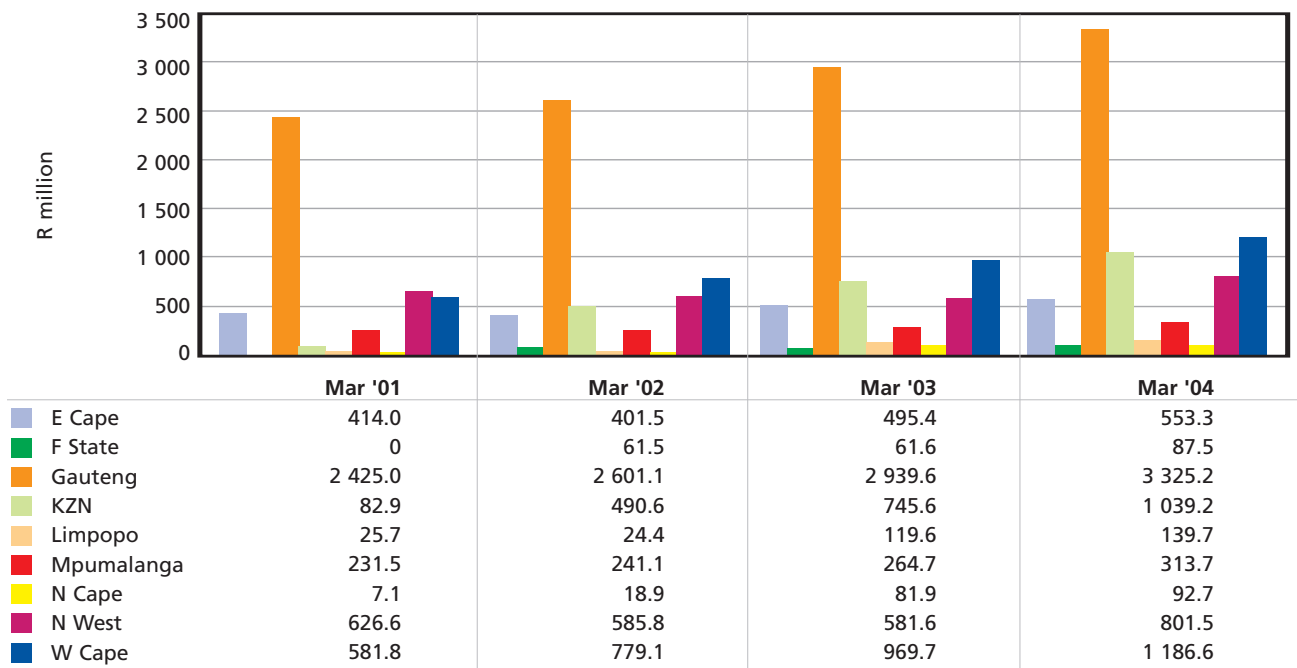


Casino Turnover - Annual

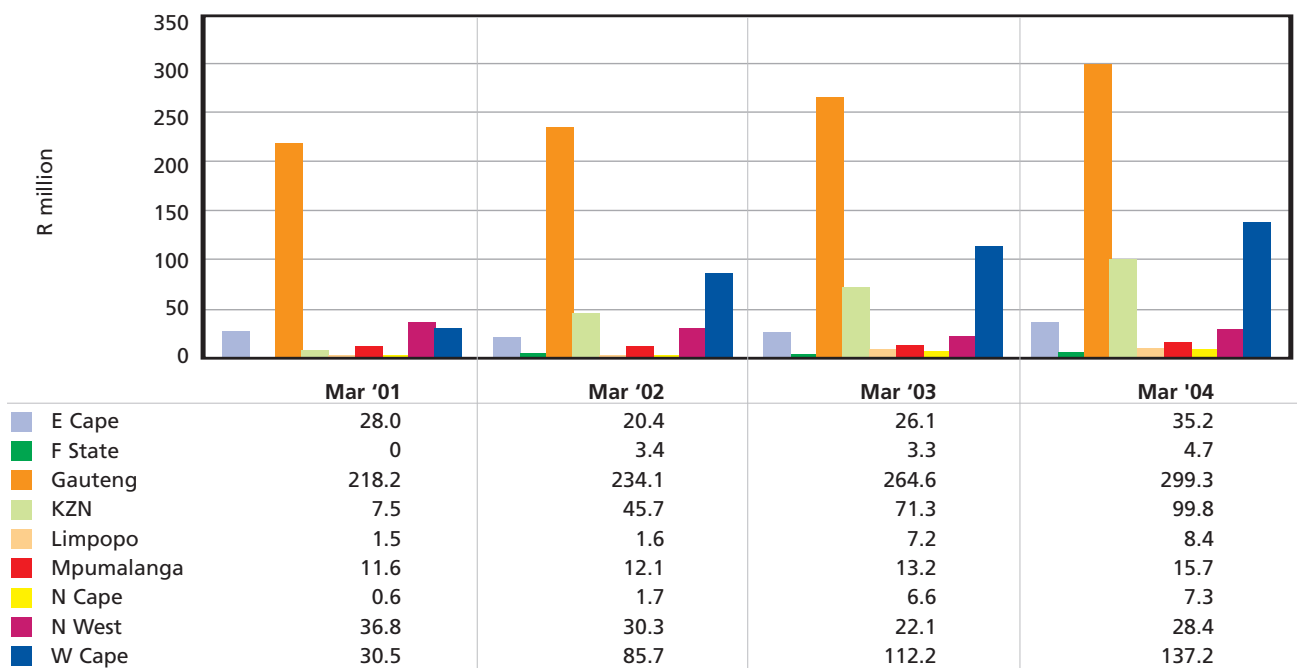




Casino GGR - Annual

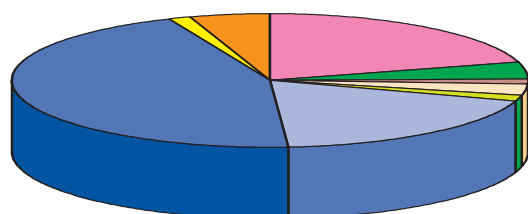


Casino Tax - Annual



Overview of Casino Entertainment

Casino Tax Revenue by Province - all modes (Financial year ended 31 March 2004)



TOTAL: R763,7-MILLION



- Compiled from unaudited data received from provincial licensing authorities
- Gross gambling revenue refers to the value of the gross win of an operator before deducting gambling taxes/levies and VAT

Consumer Spending on Casino Gaming

The following table shows the reported amount spent on the lottery, slots and horse-racing by disposable income group:

Counts Disposable Income Levels											
Type	up to R799	R800 - R1399	R1400 - R2499	R2500 - R3999	R4000 - R5999	R6000 - R7999	R8000 - R11999	R12000 - +	Don't know	Refuse	Total
Lottery Regular	221	457	626	721	519	335	433	341	197	357	4207
%	58.3%	66.6%	73.0%	77.6%	77.0%	74.8%	80.3%	71.0%	64.2%	69.1%	72.3%
Total	379	686	857	929	674	448	539	480	307	517	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Slots Regular	17	37	85	137	121	88	124	100	34	77	820
%	4.5%	5.4%	9.9%	14.7%	18.0%	19.6%	23.0%	20.8%	11.1%	14.9%	14.1%
Total	379	686	857	929	674	448	539	480	307	517	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Horses Regular	12	38	62	67	44	27	27	21	14	18	330
%	3.2%	5.5%	7.2%	7.2%	6.5%	6.0%	5.0%	4.4%	4.6%	3.5%	5.7%
Total	379	686	857	929	674	448	539	480	307	517	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Economic Impact



Eastern Cape

Current number of casinos	3
Proposed number of casinos	5
Casino employees	2 602
Casino employee wages	R126.1-million
Gross casino gaming revenue	R610-million
Casino gaming tax revenue	R38.9-million
Visitors	3 416 830
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

Date opened	September 2001
Operator	Tsogo Sun Casinos
Management company	Tsogo Sun Casino Management Company
Total capital investment	R222-million
Employees	197 permanent 194 outsourced
Payroll	R27.4-million
Slots	390
Tables	12
Visitors	1 110 830

Port Elizabeth: The Boardwalk

Date opened	October 2000
Operator	Emfuleni Resorts
Management company	Sun International Management
Total capital investment	R470-million
Employees	351 permanent 925 outsourced
Payroll	R45.7-million
Slots	727
Tables	18
Visitors	2 250 000

Bizana: Wild Coast Sun

Date opened	December 1981
Operator	Sun International
Management company	Sun International Management (Pre-1994)
Total capital investment	
Employees	473 permanent 462 outsourced
Payroll	R53-million
Slots	438
Tables	16
Visitors	563 000



Economic Impact



Free State

Current number of casinos:	3
Proposed number of casinos	4
Casino employees	743
Casino employee wages	R32-million
Gross casino gaming revenue	R90.7-million
Casino gaming tax revenue	R9.1-million
Visitors	927 433
Provincial gaming tax base:	
Taxable revenue	Rates
(millions)	of tax
	5.7%

Welkom: Goldfields Casino

Date opened	December 2003
Operator	Goldfields Casino
Management company	CAI Gold Reef Management
Total capital investment	R65-million
Employees	175 permanent 136 outsourced
Payroll	R7.4-million
Slots	235
Tables	6
Visitors	703 433

Thaba'Nchu Sun

Date opened	October 1985
Operator	Sun International
Management company	Sun International Management
Total capital investment	(Pre-1994)
Employees	136 permanent 187 outsourced
Payroll	R17.9-million
Slots	200
Tables	18
Visitors	151 000

Naledi Sun

Date opened	May 1989
Operator	Sun International
Management company	Sun International Management
Total capital investment	(Pre-1994)
Employees	71 permanent 38 outsourced
Payroll	R6.7-million
Slots	112
Tables	-
Visitors	73 000





Emerald Safari Resort

GAUTENG

Montecasino

Gold Reef City

Emperors Palace

Carnival City

Gauteng

Current number of casinos:	5
Proposed number of casinos	6
Casino employees	11 617
Casino employee wages	R620.8-million
Gross casino gaming revenue	R3.6-billion
Casino gaming tax revenue	R343-million
Visitors	13 857 644
Provincial gaming tax base:	
Taxable revenue (millions)	Rates of tax
	9.0%

Fourways: Montecasino

Date opened	September 1998
Operator	Tsogo Sun Casinos
Management company	Tsogo Sun Casino Management Company
Total capital investment	R1.9-billion
Employees	1 017 permanent 751 outsourced
Payroll	R156.6-million
Slots	1 700
Tables	70
Visitors	4 447 343

Johannesburg: Gold Reef City

Date opened	March 2000
Operator	Akani Egoli
Management company	CAI Gold Reef Management
Total capital investment	R914.1-million
Employees	1229 permanent 2279 outsourced
Payroll	R152.1-million
Slots	1 600
Tables	50
Visitors	4 860 567

Vanderbijlpark: Emerald Casino Resort

Date opened	May 2001
Operator	London Clubs International
Management company	London Clubs International
Total capital investment	R624-million
Employees	1 200 permanent and outsourced
Payroll	R52-million
Slots	660
Tables	23
Visitors	1 017 734

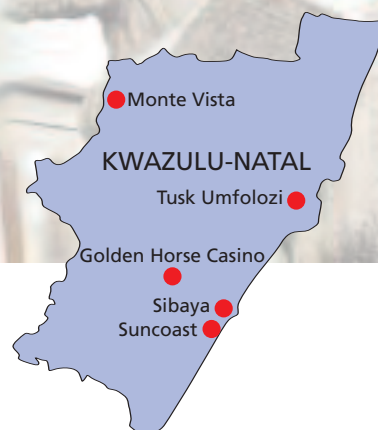
Kempton Park: Emperors Palace

Date opened	September 1999
Operator	Peermont Global (East Rand) (Pty) Ltd
Management company	Peermont Global Ltd
Total capital investment	R1.3-billion
Employees	3 180 permanent and outsourced
Payroll	R178-million
Slots	1 640
Tables	67
Visitors	4 845 235

Brakpan: Carnival City

Date opened	December 1998
Operator	Afrisun Gauteng
Management company	Sun International Management
Total capital investment	R873-million
Employees	657 permanent 1 304 outsourced
Payroll	R82.2-million
Slots	1 750
Tables	60
Visitors	3 532 000

Economic Impact



KwaZulu-Natal

Current number of casinos:	5
Proposed number of casinos	5
Casino employees:	3 707
Casino employee wages	R182.2-million
Gross casino gaming revenue	R1.3-billion
Casino gaming tax revenue	R143-million
Visitors	8 257 155
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 Casinos
Management company	Tsogo Sun Casino Management Company
Total capital investment	R1.3-billion
Employees	767 permanent 1 283 outsourced
Payroll	R79.5-million
Slots	1 250
Tables	50
Visitors	4 559 162

Durban: Sibaya Casino and Entertainment Kingdom¹

Date opened	December 2004
Operator	Afrisun KZN
Management company	Sun International Management
Total capital investment	R727-million
Employees	421 permanent 250 outsourced
Payroll	R62.3-million
Slots	877
Tables	30
Visitors	1 887 000

Empangeni: Tusk Umfolozi Casino

Date opened	May 2002
Operator	Emanzini Leisure Resorts
Management company	Tusk Casino and Hotel Management
Total capital investment	R81.3-million
Employees	138 permanent 94 outsourced
Payroll	R15.4-million
Slots	300
Tables	10
Visitors	240 000

Newcastle: Monte Vista Casino and Resort

Date opened	September 1999
Operator	Balele Leisure
Management company	Winlen Casino Operators
Total capital investment	R176-million
Employees	182
Payroll	R9.6-million
Slots	200
Tables	7
Visitors	245 934

Pietermaritzburg: Golden Horse Casino

Date opened	September 2001
Operator	Akani Msunduzi
Management company	CAI Gold Reef Management
Total capital investment	R240-million
Employees	288 permanent 284 outsourced
Payroll	R24.2-million
Slots	450
Tables	22
Visitors	1 325 059

¹ Sibaya Casino opened on 1 December 2004 and replaced the temporary Sugar Mill casino at Mount Edgecombe, which had been operating since February 2001.





Limpopo

Current number of casinos	2
Proposed number of casinos	3
Casino employees	701
Casino employee wages	R29.8-million
Gross casino gaming revenue	R156-million
Casino gaming tax revenue	R11.4-million
Visitors	1 298 000
Provincial gaming tax base:	
Taxable revenue	Rates
(millions)	of tax
	6.0%

Thohoyandou: Tusk Venda Casino Hotel

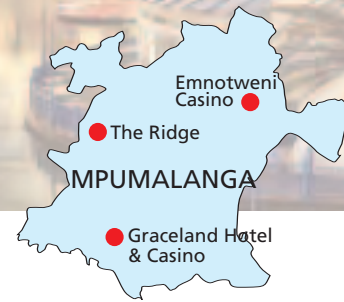
Date opened	July 1985
Operator	Tusk Resorts
Management company	Tusk Casino and Hotel Management
Total capital investment	R81.9-million
Employees	128 permanent 95 outsourced
Payroll	R10.3-million
Slots	123
Tables	6
Visitors	354 000

Polokwane: Meropa

Date opened	March 2002
Operator	Meropa
Management company	Sun International Management
Total capital investment	R175-million
Employees	180 permanent 298 outsourced
Payroll	R19.5-million
Slots	274
Tables	12
Visitors	944 000



Economic Impact



Mpumalanga

Current number of casinos	3
Proposed number of casinos	4
Casino employees	1 184
Casino employee wages	R80.1-million
Gross casino gaming revenue	R346-million
Casino gaming tax revenue	R21-million
Visitors	3 072 746
Provincial gaming tax base:	
Taxable revenue (millions)	Rates of tax
	5.7%

Secunda: Graceland Hotel, Casino and Country Club

Date opened	July 1998
Operator	Peermont Global (Southern Highveld) (Pty) Ltd
Management company	Peermont Global Ltd
Total capital investment	R239-million
Employees	500 permanent and outsourced
Payroll	R28.4-million
Slots	408
Tables	16
Visitors	649 801

Witbank: The Ridge

Date opened	September 2002
Operator	Tsogo Sun Casinos
Management company	Tsogo Sun Casino Management Company
Total capital investment	R205-million
Employees	182 permanent 159 outsourced
Payroll	R24.7-million
Slots	360
Tables	12
Visitors	1 226 174

Nelspruit: Emnotweni Casino

Date opened	October 1998
Operator	Tsogo Sun Casinos
Management company	Tsogo Sun Casino Management Company
Total capital investment	R170-million
Employees	184 permanent 159 outsourced
Payroll	R27-million
Slots	303
Tables	11
Visitors	1 196 771





North-West

Current number of casinos	5
Proposed number of casinos	5
Casino employees	8 717
Casino employee wages	R360.2-million
Gross casino gaming revenue	R650.9-million
Casino gaming tax revenue	R31.3-million
Visitors	2 924 400
Provincial gaming tax base:	

Taxable revenue	Rates
(millions)	of tax
	3.0%

Klerksdorp: Tusk Rio

Date opened	December 2004
Operator	Tusk Resorts
Management company	Tusk Casino and Hotel Management
Total capital investment	R80-million
Employees	155 permanent 115 outsourced
Payroll	R18.5-million
Slots	220
Tables	8
Visitors	No annualised figures yet

Mmabatho: Tusk Mmabatho

Date opened	December 1978
Operator	Tusk Resorts
Management company	Tusk Casino and Hotel Management
Total capital investment	R217.1-million
Employees	129 permanent 139 outsourced
Payroll	R19.1-million
Slots	155
Tables	8
Visitors	302 400

Mabopane: Morula Sun

Date opened	June 1987
Operator	Sun International
Management company	Sun International Management (pre-1994)
Total capital investment	
Employees	419 permanent 133 outsourced
Payroll	R55.7-million
Slots	645
Tables	16
Visitors	552 000

Pilanesberg: Sun City

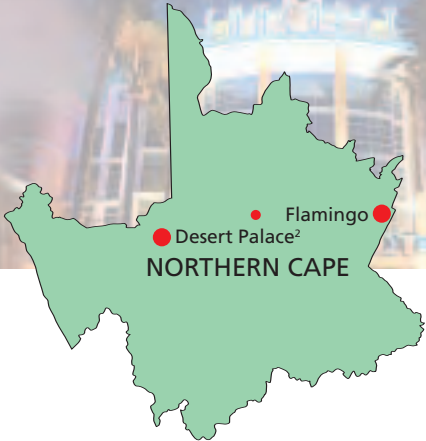
Date opened	December 1979
Operator	Sun International
Management company	Sun International Management (Pre-1994)
Total capital investment	
Employees	1 538 permanent 5 318 outsourced
Payroll	R223.8-million
Slots	600
Tables	38
Visitors	1 555 000

Hammanskraal: The Carousel

Date opened	November 1991
Operator	Sun International
Management company	Sun International Management (Pre-1994)
Total capital investment	
Employees	323 permanent 448 outsourced
Payroll	R43.1-million
Slots	778
Tables	15
Visitors	515 000



Economic Impact



Northern Cape

Current number of CASA-affiliated casinos	1	Kimberley: Flamingo Casino	
Proposed number of casinos	3	Date opened	March 2002
Casino employees	292	Operator	Teemane
Casino employee wages	R13.1-million	Management company	Sun International Management
Gross casino gaming revenue	R90.7-million	Total capital investment	R125-million
Casino gaming tax revenue	R7.6-million	Employees	120 permanent 172 outsourced
Visitors	325 000	Payroll	R13.1-million
Provincial gaming tax base:		Slots	212
Taxable revenue	Rates	Tables	9
(millions)	of tax	Visitors	325 000
	8.0%		

² Desert Palace is not a member of CASA





Western Cape

Current number of casinos	4
Proposed number of casinos	5
Casino employees	3 274
Casino employee wages	R125.4-million
Gross casino gaming revenue	R1.39-billion
Casino gaming tax revenue	R157-million
Visitors	4 583 637

Provincial gaming tax base:

Taxable revenue (millions)		Rates of tax
0 – 10		6.0%
10 – 20	R600 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
Management company	Sun International Management
Total capital investment	R1.5-billion
Employees	825 permanent 1 494 outsourced
Payroll	R97.7-million
Slots	1 774
Tables	60
Visitors	3 802 000

Caledon: Caledon Casino, Hotel & Spa

Date opened	October 2000
Operator	Century Casinos Caledon
Management company	Century Casinos Africa
Total capital investment	R105-million
Employees	376 permanent and outsourced
Payroll	R18-million
Slots	300
Tables	9
Visitors	284 400

Langebaan: Casino Mykonos

Date opened	November 2000
Operator	West Coast Leisure
Management company	CAI Gold Reef Management
Total capital investment	R66.3-million
Employees	170 permanent 109 outsourced
Payroll	R13.3-million
Slots	250
Tables	9
Visitors	648 383

Mossel Bay: Garden Route Casino

Date opened	December 2002
Operator	Garden Route Casino
Management company	CAI Gold Reef Management
Total capital investment	R118-million
Employees	203 permanent 97 outsourced
Payroll	R12.9-million
Slots	250
Tables	12
Visitors	497 237



Corporate Social Investment



Activities during the year

Tsogo Sun, across its five properties, invested some R3.3-million in CSI projects, ranging from contributions to the KwaZulu-Natal Philharmonic, Christmas hampers to old age homes, support of the Ikageng Itirileng Aids Ministry in Soweto in support of the SA Guide Dogs Golf Day and donations to the SPCA in Witbank.

Caledon Casino's total CSI expenditure for 2004 is R236 267. During the year it entered into a long-term relationship with a local HDI company in order for them to open a laundry and dry cleaning facility in the town. To date payments to this venture have totalled R123 212. Other organisations to receive donations or sponsorships have included the local ACVV creche (R29 000), the Elim Tehuis (R12 000), the SA Red Cross Air Mercy Service (R1 900), Holy Trinity Church (R10 000) and the Genadendal Development Trust (R5 000).

Peermont disbursed nearly R6.7-million to upliftment trusts such as the East Rand Children's Trust and the Southern Highveld Community Development Trust, to its own employee assistance programmes, to HIV/Aids programmes and to the NRGF.

Tusk Resorts' Umfolozi Casino reported a CSI spend of R228 000, most of it directed to black education projects such as a creche at Ndabayakhe, a rural area on the outskirts of Empangeni (R14 000), a meals project at the Thuthukani Schools (R38 000) and a classroom at the Siyakhanyisa Primary School (R19 417). Donations are also made to other causes, such as Child Welfare, the SPCA and Zululand Lifeline.

Gold Reef City made contributions of just over R3-million to various organisations such as the Foundation for Tolerance (R175 000) and the Yeshiva College for disadvantaged scholars (R180 000). In the same group, Golden Horse Casino disbursed

donations of R1.4-million, including the Science Museum's Educational Centre (R306 172) and Project Gateway, which assists disadvantaged youth in KwaZulu-Natal (R130 000). At Club Mykonos, a 5% pre-tax contribution went to the West Coast Community Trust, formed with the main objective of providing educational support to the local community (R286 494) and the NSRI received R300 000 for the construction of a boat station.

Sun International sets aside 1.5% of its annual profit after tax to invest in CSI projects, with an impending increase to 2% from 2006 onwards. In the year ending 30 June 2004, the group spent R7.7-million on community development projects (R770 000), education (R1.7-million), health and welfare - including HIV-Aids (R3.16-million) and sports, arts and culture (R1.8-million).

From the group's head office, Sun International again made its annual sponsorship of R600 000 to Disability Sports SA and R15-million to the South African Sports Trust covering more than 60 projects. Ongoing commitments continue to the bursary programme of the SA Institute of Race Relations and the Variety Club whose objective is to support children's charities from all communities throughout the country.

Among regional initiatives, GrandWest donated R105 000 to the Tygerberg Hospital School and the Brooklyn Chest Hospital School, which accommodate children who need to stay in hospitals for longer than six weeks. Sun City gave R200 000 to the Holy Family School for the construction of a school hall and R1.4-million for the construction of a 20-bed Aids hospice in Phokeng. Carnival City made a donation of R109 000 to the Lesabe Primary School for the erection of a palisade fence and furniture.





Problem Gambling and Responsible Gambling

During 2004 the National Responsible Gambling Programme published its second major research report on gambling and problem gambling behaviour, the most comprehensive study of its kind ever undertaken in Africa. This followed similar research undertaken in 2001. In addition to giving a reasonably comprehensive insight into how South Africans currently perceive and participate in gambling, it enables us to see to what extent and in what ways gambling behaviour has changed since the early days after the first casinos were opened and the national lottery started operations.

The principal findings of this research were reported to the Department of Trade and Industry and to Parliament's portfolio committee on trade and industry between July and September 2003 during the public hearings on the National Gambling Bill.

With respect to participation in gambling activities, the report found that:

- Gambling overall has grown: the number of people who never gamble was 25.6% and is now 20.1%.
- The principal gambling activities in South Africa are the lottery, slots, scratch-cards and the horses, in that order.
- Growth has come mainly from the lottery: the number of people who play the lottery regularly was 67.6% and is now 72.3%.
- The number of people who play slots has grown somewhat overall (28.9% to 31.1%) but the number who play slots regularly has declined (19.2% to 14.1%).
- Scratch-cards are up both in overall and regular participation (20.8% to 23.7% overall and 12% to 15% regular).
- All other gambling activities have declined in the face of the new competition.

With respect to expenditure on gambling by different groups it was reported that:

- All income groups tend to play the lottery, including the poorest. Fairly poor people tend to play the horses and more affluent people tend to play the slots.
- Conversely, when poor people play the slots and horses they spend a very high proportion of their income doing so, whereas they spend only modestly on the lottery.

With respect to problem gambling it was reported that:

- In 2001, 221 out of 5 800 respondents answered seven or more of the 20 Gamblers Anonymous questions affirmatively. In 2003 the number was 270 out of 5 816.

These numbers constitute 3.8% and 4.6% respectively of the sample, 1.1% and 1.3% of the population as a whole and 5.3% and 6.1% of regular gamblers.

- There are probably now 550 000 people who gamble too much to the point where it is causing serious problems to themselves and those close to them and who would benefit from education and/or counselling.
- In 2001 there were 35 problem gamblers who only played the lottery. In 2003 there were 87.
- In 2001 there were 186 problem gamblers who played something other than the lottery regularly whether or not they also played the lottery. In 2003 this number was 187.
- Of problem gamblers in 2001, 84% played something other than the lottery and 16% played the lottery only. In 2003 67.5% of problem gamblers regularly play something other than the lottery, while 32.5% only play the lottery.
- Of the 270 problem gamblers in 2003
 - 21 members of the group revealed expenditure on roulette, the average monthly spend being R782
 - 123 members of the group revealed expenditure on slots, the average monthly spend being R644
 - 251 members of the group revealed expenditure on the lottery, the average monthly spend being R80.

These numbers show that there has been no significant increase in problem gambling between 2001 and 2003 other than a small increase amongst those who only play the lottery. This is attributed mainly to the fact that the accessibility of machine gambling, especially to poor people in terms of both location and price, has clearly declined since the very extensive illegal casino industry has been almost entirely replaced by the 32 legal casinos which have been opened since 1996.

When the problem gambling sample was analysed by income and race it was found that the distributions were fairly flat and did not provide evidence for the view that the poor are especially irresponsible when it comes to spending their money on gambling, nor for the view that black people are especially likely to exhibit gambling problems.



(Exactly 5% of black respondents were identified as problem gamblers as opposed to 6.2% of coloured respondents, 3.4% of whites and 4.5% of Indians.)

All these results suggest that levels of problem gambling in South Africa remain broadly in line with those found in other jurisdictions where the availability of commercial gambling is similar. It should again be stressed, however, that all numbers relating to the prevalence of problem gambling should be interpreted with great caution. The reasons for this relate mainly to the relative crudeness of the instruments used to measure problem gambling, the fact that respondents - especially problem gamblers - often do not tell the truth about their gambling, and the general difficulties with the reliability of surveys. All that can be said with certainty is that when we have done the same things as we did in 2001 and very similar things to what is done in other jurisdictions, we have got broadly similar results.

Towards the end of 2003, an academic study of the treatment of gambling addiction in South Africa found that the NRG's

outpatient programme for problem gamblers has a treatment success rate of 75%.

The study by Miranda Bulwer³, a social worker in the NRG's nationwide team of 21 counsellors, evaluated the effectiveness of the NRG's six-week outpatient treatment programme.

The objectives of this study were to provide a detailed biopsychosocial description of the characteristics of a sample of 100 individuals screened and referred by the NRG helpline for their outpatient treatment programme over an eighteen month period, and, importantly, to measure the success of this specific treatment programme at set intervals, up to a one-year follow-up period. There is evidence in the study to support the perspective that pathological gambling is a multidimensional disorder and that certain sub-groups of gamblers have distinct gambling behaviour. While 80% did not relapse during the six-week treatment programme, the number of treatment seekers without any gambling relapses during each follow-up period declined, and those falling back into gambling increased as time went on. After one year 47%

³ Bulwer, M. & Nieuwoudt, J.M. 2003. Treating Gambling Addiction: A Psychological Study in the South African Context. Submitted to the University of South Africa in fulfilment of the requirements for the degree of Master of Arts (SS) in the subject Psychology.





of treatment seekers managed not to revert back to gambling – total abstinence. A further 28% reported having relapsed or that their gambling was controlled. 25% of treatment seekers reported that they reverted back to gambling fulltime, which leaves the success rate of the treatment at 75%. Treatment seekers reported an overall reduction in gambling participation, debt and expenditure and an overall improvement in social and vocational functioning.

During its 2003-04 financial year, the NRGPs helpline dealt with 3 471 calls directly related to problem gambling.

- Of these calls, 26% (936) were self-identified problem gamblers who were then referred directly for treatment.
- In addition, 11% (396) of problem gambler callers received counselling over the telephone which the caller regarded as sufficient.
- The bulk of the problem gambling enquiries for help required information only about problem gambling. This may have been advice, assessment or information about the service.



The NRGPs has entered into contracts with four residential treatment facilities around the country to provide a two-week containment, stabilisation and treatment programme at a subsidised rate.

The NRGPs recognises that gambling staff play a vital role in the gambling environment, as they are at the forefront in dealing with customers, providing customer care and a pleasant gambling environment. They are the most likely to have to deal with situations where punters may have a problem with gambling. Therefore it is important that staff members are educated in the nature and extent of problem gambling.

The NRGPs supports the notion that staff should not be involved in diagnosing problem gamblers. Nor should they be expected to be counsellors or to police problem gamblers. However they should be equipped with the knowledge and skills required to provide a professional response to punters who identify themselves as having a gambling problem.

The NRGPs does not encourage floor staff to discuss the punter's gambling behaviour with the punter. The main outcome of the responsible gambling basic course is to equip staff to report the warning signs of problem gambling and specific problematic punters to their floor managers and supervisors.

The two-hour basic course is available for all casino staff members and includes the following outcomes:

- Definitions of the various types of gamblers, social, problem and compulsive (pathological) gamblers.
- The warning signs of problem gambling including case studies
- The gambling dependency process
- The consequences of problem and pathological gambling
- The services offered by the NRGPs

Regulatory Authorities in South Africa

National Gambling Board of South Africa

Block E, Uuzaji
2nd Floor Mapungubwe Building
77 Meintjies Street
Sunnyside
Pretoria 0002

Private Bag X27
Hatfield 0028

Tel: +27 (0) 12 394 3800
Fax: +27 (0) 12 394 0831
E-mail: info@ngb.org.za
www.ngb.org.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
E-mail: info@ggb.org.za
www.ggb.org.za

Northern Cape Gambling and Racing Board

18-22 Stockdale Street
Kimberley 8300

Private Bag X6108
Kimberley 8301

Tel: +27 (0) 53 832 9516
Fax: +27 (0) 53 832 2564
Email: pgaoboihi@met.ncape.gov.za

North-West Gambling Board

East Gallery, MegaCity
Sekame Road
Mmabatho 2790

Private Bag X3,
Mmabatho 2735

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

Limpopo Gambling Board

22 Schoeman Street
Polokwane 0699

Private Bag X9520
Polokwane 0700

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

Mpumalanga Gaming Board

First Avenue
White River 1240

Private Bag X9908
White River 1240

Tel: 27 (0) 13 750-8000
Fax: 27 (0) 13 750-8099
E-mail: fortunes@mgb.org.za
www.mgb.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
E-mail: info@kzngambling.co.za
www.kzngambling.co.za

Eastern Cape Gambling and Betting Board

Quenera Park
Quenera Drive
Beacon Bay
East London 5201

P.O. Box 18304
Quigney
East London 5211

Tel: +27 (0) 43 702 8300
Fax: +27 (0) 43 748 2218
E-mail: nwabisam@ecgbb.co.za
www.ecgbb.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
Fax: +27 (0) 21 422 2603
E-mail: rossouw@wcgrb.co.za
www.wcgrb.co.za

Free State Gambling and Racing Board

190 Nelson Mandela Drive
Bloemfontein 9300

PO Box 9229
Bloemfontein 9300

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

SA Bureau of Standards

Tel: +27 (0) 12 428 6358
Fax: +27 (0) 12 428 6233
E-mail: motsoate@sabs.co.za
Website: www.sabs.co.za
-Click: Regulatory Division
-Click: Electrotechnical & Gaming



Responsible Gambling Structures

**S O U T H
A F R I C A N
R E S P O N S I B L E
G A M B L I N G
F O U N D A T I O N**

South African Responsible Gambling Trust

Dr Vincent Maphai (Chairperson)
Mr Chris Fisser (Vice-Chairperson)
Tel: +27 (0) 12 394 3800
Fax: +27 (0) 12 394 4800
E-mail: tmajake@ngb.org.za

Private Bag X27
Hatfield 0028

77 Meintjies Street
Sunnyside
Block E
Pretoria 0001

National Responsible Gambling Programme / SARGF

Professor Peter Collins (Executive Director)
Tel: +27 (0) 83 625 6155

P.O. Box 16331
Vlaeberg 8018

c/o Faculty of Commerce
University of Cape Town
P.O. Rondebosch 7700

Website: www.responsiblegambling.co.za
E-mail: info@responsiblegambling.co.za

Reference Information

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**SOUTH AFRICAN
SARGT
RESPONSIBLE GAMBLING TRUST**



**N A T I O N A L
Responsible
Gambling
P R O G R A M M E**



LOREN JORDAAN
Training Manager

For most people, gambling is a harmless pastime. But for those who gamble too much and develop a dependency on gambling, it can become a serious problem. That's where we in the NRGP come in: helping people and their families.



MANDLA MNQAYI
Service Provider

My first job was a cleaner at the University of Zululand. While I was there, I completed an honours degree in the Arts faculty. I now have my own business, employing 30 people, and we got our big break when we won the contract to provide all cleaning services at our local casino resort. Now we've got other clients too.



CLIFFORD NGAKANE
Casino General Manager

I joined the industry as a trainee croupier 15 years ago, and today, at 33 years young, manage a R208-million casino property. There's more to come.



MATJIE MASHA
Tourism Operator

The opening of our casino created many opportunities in the tourism sector. I love the customer contact, especially with foreign tourists, who tell me our casino resorts are among the best in the world.



WILLIAM STOFIE
Entrepreneur

Starting as a trainee chef in the gaming industry, I now have my own business supplying, among other clients, our local casino resort with all its bakery and pastry requirements. I have represented South Africa in food and wine promotions in Swaziland, France and South Korea.

Making a difference to real people.

As recently as 1994, gambling was largely unregulated in South Africa, with some 150 000 problematic illegal slot machines in urban areas throughout the country.

This giant illegal industry paid no tax, offered no consumer protection, and was all too often associated with other forms of vice, including drug dealing and prostitution.

Today, South Africa's new casino industry has less than 20 000 machines, has been responsible for R12-billion in new investment, has created nearly 100 000 direct and indirect new jobs, and pays over R1.7-billion to government each year in tax¹.

Empowerment partners have 60% voting control of casino companies, and an effective 38% economic interest in our operations, much more than comparable industries.

And we have invested R10.5-million in addressing the issue of problem gambling and each year contribute over R27-million in other corporate social responsibility spending².

Our industry is tightly regulated with strictly enforced controls in terms of player protection, the exclusion of minors and probity standards.

All this means that the new casino industry in South Africa is making a real difference to millions of customers, to its employees, and to those who have seized the opportunity to grow their businesses and skills with us.

And that is good for South Africa.



GIVEN MASHABELA
Internal Auditor

After completing a degree in Accounting and Business Economics, I had difficulty finding work. Then, I got a job as a croupier, and after completing the Graduate Management Development Programme, I'm now the group internal auditor of a multi-million rand casino operation.



MARGARET CHOCHOE
Manager

I was a student before I landed a job at the casino as an attendant. I have now completed a BSc in Statistics, and have been promoted from slots supervisor to manager. This is such a dynamic environment that promotion is there for those who work hard and gain the skills.



COLIN PRIEM
Contractor

Ours is one of the largest black-owned landscaping companies in South Africa, with 130 staff and eleven professional horticulturalists. I was especially pleased to win what was a major contract to do the landscaping, construction, installation and maintenance of the gardens at one of the biggest casino resorts in the country. By international standards, this was a major assignment.



TAMMY GOVENDER
Dealer

I started my career in this casino, and am aiming for a management position. This is an international industry that is going places, and I know I can progress up the ladder because I learn something new everyday.



CHERYL BENJAMIN
Slots Shift Manager

When I applied for employment at our casino, what attracted me most was the training, which is the most comprehensive in the hospitality industry. Three years ago I was a housewife; last year I was voted employee of the year in my department. Now I'm a shift manager.

Derek Auret Chief Executive **Casino Association of South Africa**
Phone: +27 21 409 2460 **Fax:** +27 21 419 7271
Postal: PO Box 15685 Vlaeberg 8018 **E-mail:** info@casasa.org.za