

# The 2012 Survey of Casino Entertainment in South Africa



CASA

Casino Association of South Africa





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## Message from the Chairman



It is once again my pleasure to introduce the annual CASA Survey which has, since its inception in 2005, become the authoritative resource for those wishing to obtain a comprehensive overview of the impact of the casino industry on national and provincial economies.

As in previous editions, this Survey records not only national economic impact data, including gaming revenues, but reports on the employment and wages generated by South Africa's 37 casinos and their considerable contribution to community development projects throughout the country.

It is impossible to regard this document without taking account of the effects of the global economic crisis on the gambling sector, both locally and internationally. In the year under review, the distant prospects of economic recovery have resulted in subdued trading conditions, a decrease in inbound tourism to our casino resorts, and an uncertain effect on consumer confidence. But despite this unpromising environment, the casino industry has continued to display a remarkable resilience, with gaming revenue showing sustained growth, accompanied by a continuing commitment to the refurbishment and expansion of casino properties.

Compounding these economic challenges has been a growing enthusiasm on the part of policy-makers for the more stringent regulation and taxation of the industry.

The National Assembly's Portfolio Committee on Trade and Industry has made a number of recommendations flowing from the findings of the Gambling Review Commission, which are designed to form the basis for legislative amendments. Among these are proposals for more frequent reviews of casino licence conditions, the duplication of many of the functions presently so ably undertaken by the public/private sectors' National Responsible Gambling Programme, and a recommendation that no expansion of casino gaming offerings should be permitted in the absence of a socio-economic impact study.

No doubt, many of these proposals are well-intentioned. But it needs to be said that South Africa's casino industry is internationally regarded as an example of best-practice regulation and the National Responsible Gambling Programme enjoys a reputation as one of the world's most successful and effective programmes of its sort – and certainly the most cost-effective. It would be a regrettably retrogressive step were a series of unco-ordinated and poorly conceived regulatory amendments to compromise the operation of an industry that is both socially and economically successful, and that both is, and is perceived to be, safe.

CASA is convinced that when considering policy changes, all stakeholders must resist the temptation to adopt measures that are driven by emotional argument or superficial analysis of the gambling environment. Best practice regulation processes are well understood, but sometimes overlooked. For that reason, we believe a rigorous regulatory impact assessment should be a necessary precondition for effective and efficient policy-making.

South Africa has been enormously successful in achieving Government's policy objective to exploit gambling as a source of taxation revenue, job creation and economic empowerment; in other words, to regulate the gambling industry in a manner which will bring the greatest net benefits to society as a whole. It was for this reason that in all the provincial jurisdictions, the casino licensing process insisted that prospective operators should commit themselves to sizeable investment in tourism infrastructure and community facilities, the generation of employment and the promotion of economic development through the empowerment of previously disadvantaged communities.

Future policy should build on these achievements rather than endanger them by any ill-considered changes to the regulatory regime which has served us so well.

For policy-makers and legislators to make rational decisions about the casino industry, it is clearly essential that they be provided with the most reliable, trustworthy and exhaustive information about the contribution made by the industry to the good of society. This Survey is designed to contribute towards that understanding, in the hope that from that will flow fact-based analysis that is firmly grounded not in populist misconceptions about South Africa's commercial casino sector, but in firm empirical evidence. As such, CASA would welcome more engagement and consultation with Government, policy makers and the regulators.

A handwritten signature in dark ink, appearing to read 'Jabu Mabuza', with a stylized flourish at the end.

JABU MABUZA  
Chairman



## Message from Chief Executive



This is the ninth edition of the annual Survey of Casino Entertainment. As in previous years, we present in the pages that follow a comprehensive account of the industry's contribution to not only the South African entertainment and leisure sector, but also to the broader economy.

The data in this publication demonstrate the vital role the industry plays in the regions and communities where it operates, creating jobs and business opportunities for local enterprises and providing direct gaming tax revenues to stimulate provincial economies and sustain local community development initiatives.

CASA members have invested in excess of R20bn in infrastructure leading to the development of world class entertainment destinations incorporating more than 7 000 hotel rooms, road upgrades, convention centres, tourist attractions, theme parks, sports facilities, restaurants and eventing facilities, and have single-handedly revived the arts through theatres, museums and the development of new cinema complexes. Our members have created over 100 000 direct and indirect jobs, many of which gave employment to people with no previous work experience, in addition to B-BBEE shareholding structures that are the envy of traditional industries struggling to transform. CASA members have also contributed in excess of R50 billion to GDP in terms of economic multipliers, invested in excess of R80 million per year in community social investment, established an internationally recognized responsible gambling program with a budget of more than R10 million per year, and in 2011/2012 alone accounted for more than R1.8 billion in Provincial Gambling Taxes and VAT which, together with Company Tax, contributed more than R4.7 billion to Government revenue. Government has an effective 36% share of the 'value-added' to the economy by the casino sector and as such it is the largest de-facto stakeholder in the industry.

It is surely indisputable that if such public benefits are to be secured from the casino sector, governments need to create a stable operating environment through an explicit regulatory and taxation framework which encourages investment and results in a sustainable industry. For this to be so, CASA believes government should ensure the lowest possible costs of doing business, including low taxation rates, low licence fees and minimal regulatory costs.

This necessarily means that government must guard against a view that regards casinos as tempting and easily-accessed sources of

income and imposes abnormally large taxes on gambling revenues. While this undoubtedly yields short-term economic benefit to the fiscus, it ignores the fact that high taxes mean lower capital investment in non-gambling facilities which will attract increased tourism spend and produce much-needed public infrastructure.

Worrying portends of things to come have included the announcement by Finance Minister Pravin Gordhan in the February budget review that he intends introducing a national tax based on gross gambling revenue. His proposal of an additional 1% gambling tax with effect from 1 April 2013 poses a substantial threat to the profit margins of our members and thus to the achievements recorded in this Survey.

This is not the first time that the Treasury has threatened further taxation of the gambling sector, as it follows a 2011 budget proposal of a 15% withholding tax on gambling winnings above R25 000. That scheme has since been abandoned, but its replacement in the form of an additional 1% national levy on top of existing provincial gambling taxes now seems inevitable.

South Africa's casino sector is already a major source of tax revenues and Government needs to be cautious about the extent to which further fiscal burdens will threaten the profitability of an industry which is a major generator of jobs and investment in public infrastructure. The imposition of new taxes will, in addition, also impede the expansion and refurbishment of existing gaming and non-gaming facilities and act as a real disincentive to the further development of the industry.

As this edition of the Survey reports, gross gambling revenue in the 2011/12 fiscal year amounted to R18.4 billion, of which the casino sector accounted for 81%, which was an increase over the R17.14 billion recorded in 2010/11. This represents a sustained growth in casino turnover, despite the country's continuing experience of a weak economic environment, declining disposable incomes and deteriorating consumer confidence.



At the same time, taxes and levies paid by the gambling industry rose to R1.8 billion, an increase over the R1.6 billion collected in the previous year. The casino sector paid 77% of these taxes.

The greatest enemy of any business – particularly one as capital-intensive as the casino sector – is uncertainty. In this regard, it is important to bear in mind that the casino business is abnormally risky because markets are difficult to predict. Consequently, because casino operators are as interested as any business undertaking in the ratio of return to risk on their investment, investors in casino projects require a higher than average return on their investment.

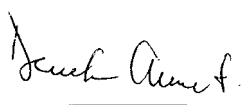
Above all, we need security against unexpected and harmful changes of the rules. This is true not only of the fiscal environment, but of regulation more generally, and Government must be clear about its policy objectives and offer consistent, predictable and well-defined criteria.

Fortunately, the South African casino industry has thus far been spared a climate of confrontation, mutual suspicion and antagonistic over-regulation which could so easily have developed around an industry that is by its very nature often controversial. The result has been a regulatory regime which has created a stable operating environment in which we have been able to develop a sustainable and profitable gaming sector.

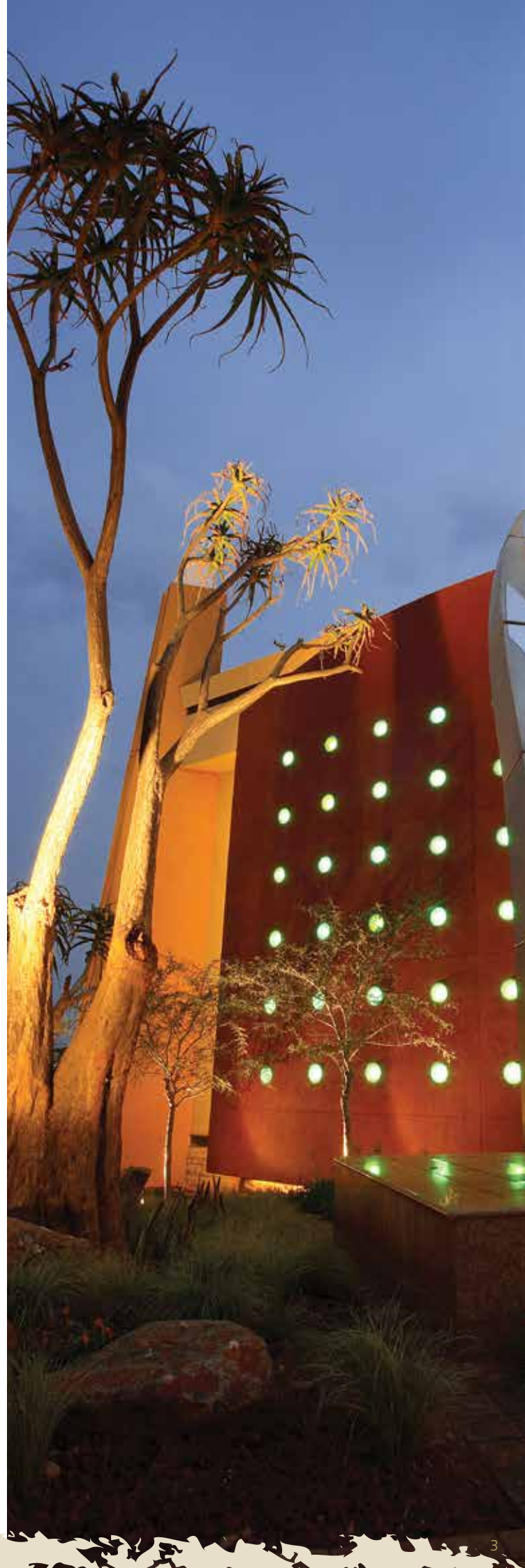
But because it is a truism of any political order that policy changes over time and lawmakers come and go, there is always the danger that policy directions will shift and the rules of the game change. There are already signs that in their analysis of the findings and recommendations of the Gambling Review Commission, some policy-makers are intent upon further control of gambling generally and the casino industry specifically.

CASA acknowledges the State's essential role in the management of South Africa's gaming industry, but believes that commercial gambling is always a public-private sector partnership in which each party has a common interest in ensuring both that the industry is profitable over the long term and that it enjoys broad public approval, contributes to the economic well-being of non-gamblers as well as of gamblers, and is not perceived as exploitative and indifferent to negative social impacts.

For those reasons, I trust that this edition of the Survey will prove as useful as its predecessors in providing the reader with all the information that is required to understand the dynamics of South Africa's casino industry and the numerous benefits it brings to society.



DEREK AURET  
Chief Executive





## Black Economic Empowerment



As recently as in 2009, CASA addressed an open letter to the Minister for Trade and Industry expressing the commitment of the casino industry to achieve an overall Level 4 rating in terms of the Codes of Good Practice on Broad-Based Black Economic Empowerment by 2010. We are pleased to announce that this target has not only been achieved, but materially exceeded, to the extent that an overall Level 2 rating has now been achieved.

Pursuant to the undertakings made to the Minister for Trade and Industry, CASA instructed Empowerdex to perform a Broad-Based Black Economic Empowerment ("B-BBEE") assessment in respect of all the casinos which are members of CASA in terms of the Codes of Good Practice. This exercise was completed during the last quarter of 2011, based on information provided in respect of 2010, and excellent results were achieved across the board.

The analysis was performed in respect of the casino industry as a whole, and reveals a national industry score of 95.00 points, which is equivalent to a Level 2 B-BBEE Contributor status. This includes ratings on all the elements of the Codes of Good Practice. The table below details the B-BBEE performance of casinos in the various provinces, as well as the consolidated national figures, excluding contributions made by the head office entities of the various casino groups.

From the Table below it is notable that in terms of the following elements of the Codes of Good Practice, casino operations in South Africa are:

- 100% compliant in terms of the ownership element (22 points out of 22);
- 100% compliant in terms of the enterprise development element (15 points out of 15);
- 100% compliant in terms of the socio economic development element (5 points out of 5), and
- 95.8% compliant with the preferential procurement element (19.16 points out of 20).

### Ownership and Management Control

Empowerdex verified that on a national basis, 45.47% of all voting rights are in the hands of black people and 45.93% of the total economic interest is in the hands of black people. This is exemplarily

| Provincial Scores | Ownership (Verified) | Management Control | Employment Equity | Skills Development | Preferential Procurement | Enterprise Development | Socio-Economic Development | Over-all-Score | B-BBEE Contributor Status Level |
|-------------------|----------------------|--------------------|-------------------|--------------------|--------------------------|------------------------|----------------------------|----------------|---------------------------------|
| Gauteng           | 22.00                | 7.19               | 13.69             | 14.05              | 17.96                    | 15.00                  | 5.00                       | 94.89          | Level2                          |
| KwaZulu-Natal     | 22.00                | 8.15               | 12.17             | 12.34              | 18.72                    | 15.00                  | 5.00                       | 93.38          | Level2                          |
| Eastern Cape      | 21.96                | 7.36               | 12.19             | 10.82              | 18.97                    | 15.00                  | 5.00                       | 91.30          | Level2                          |
| Free State        | 22.00                | 6.07               | 11.69             | 11.38              | 17.93                    | 15.00                  | 5.00                       | 89.07          | Level2                          |
| Western Cape      | 19.50                | 6.49               | 13.10             | 9.46               | 20.00                    | 15.00                  | 5.00                       | 88.55          | Level2                          |
| Limpopo           | 21.59                | 5.26               | 11.89             | 11.70              | 15.98                    | 15.00                  | 5.00                       | 86.42          | Level2                          |
| North West        | 21.92                | 5.76               | 8.22              | 9.60               | 18.01                    | 15.00                  | 5.00                       | 83.52          | Level3                          |
| Mpumalanga        | 23.00                | 7.36               | 11.98             | 10.33              | 20.00                    | 3.01                   | 5.00                       | 80.68          | Level3                          |
| Northern Cape     | 11.53                | 5.06               | 8.17              | 8.56               | 18.10                    | 15.00                  | 5.00                       | 71.43          | Level4                          |
| National Score    | 22.00                | 7.50               | 12.92             | 12.92              | 19.16                    | 15.00                  | 5.00                       | 94.51          | Level2                          |



| Ownership      | Voting Rights (Black) | Voting Rights (Black Women) | Economic Interest (Black) | Economic Interest (Black Women) | Economic Interest (Designated Groups) | Current Economic Interest | Bonus: Black New Entrants | Bonus: Broad-based Scheme / Esops | Score |
|----------------|-----------------------|-----------------------------|---------------------------|---------------------------------|---------------------------------------|---------------------------|---------------------------|-----------------------------------|-------|
| Mpumalanga     | 57.85%                | 19.06%                      | 57.85%                    | 19.06%                          | 17.64%                                | 42.01%                    | 19.65%                    | 17.64%                            | 23.00 |
| Free State     | 46.25%                | 14.74%                      | 46.30%                    | 14.69%                          | 11.25%                                | 46.01%                    | 12.91%                    | 11.25%                            | 22.00 |
| Gauteng        | 52.96%                | 15.80%                      | 53.21%                    | 15.34%                          | 29.40%                                | 46.52%                    | 16.02%                    | 11.80%                            | 22.00 |
| North West     | 42.51%                | 13.41%                      | 43.03%                    | 12.89%                          | 9.22%                                 | 40.14%                    | 13.29%                    | 9.22%                             | 21.92 |
| KwaZulu-Natal  | 41.33%                | 12.36%                      | 41.20%                    | 11.86%                          | 11.30%                                | 31.59%                    | 12.28%                    | 10.73%                            | 22.00 |
| Limpopo        | 68.09%                | 8.82%                       | 54.12%                    | 10.74%                          | 8.29%                                 | 54.21%                    | 13.79%                    | 8.29%                             | 21.59 |
| Eastern Cape   | 37.49%                | 10.80%                      | 38.09%                    | 9.80%                           | 11.10%                                | 26.27%                    | 21.07%                    | 11.10%                            | 21.96 |
| Western Cape   | 30.01%                | 6.09%                       | 27.20%                    | 5.58%                           | 7.70%                                 | 25.99%                    | 7.23%                     | 7.23%                             | 19.50 |
| Northern Cape  | 7.52%                 | 2.35%                       | 14.88%                    | 5.12%                           | 8.91%                                 | 14.88%                    | 8.91%                     | 8.91%                             | 11.53 |
| National Score | 45.47%                | 12.99%                      | 44.93%                    | 12.59%                          | 18.29%                                | 38.30%                    | 14.13%                    | 10.85%                            | 22.00 |

and must be seen against the backdrop of an industry with a total GGR value of approximately R14-billion. In addition, 12.59 % of the casino industry is in the hands of black women.

The casino industry has progressed significantly in respect of Board representation by black persons and on average, 44.06% of all board members of companies in the casino industry are from a previously disadvantaged background.

#### Employment Equity

Notable achievements of all casino operations in respect of

- 42.39% of Senior Management is black;
- 54.43% of Middle Management is black, and
- 71.05% of Junior Management is black.

#### Preferential Procurement

Excellent results were achieved and 67,40% of the total measured procurement in the casino industry was procured from B-BBEE suppliers.

Total procurement spend for the casino industry for the measuring period amounted to R5.2 billion, signifying the market opportunities for goods and services that have been created for B-BBEE suppliers.

#### Enterprise Development

On aggregate the casino industry was awarded the maximum points achievable and scored 15 out of 15 points for enterprise development. 6,84% of all Net Profit After Tax in the industry went towards this element. This is significant in that the enterprise development component directly contributes towards the facilitation of the financial and operational independence of black-owned enterprises dealing with the casino industry.

#### Skills Development

A compliance rate of 86% was achieved for this element and 3,40% of leviable payroll was invested in the training of previously disadvantaged individuals working in the casino industry.

#### Conclusion

CASA is proud to be associated with an industry which, despite harsh economic conditions, has pledged to make a difference in respect of the advancement of Broad-Based Black Economic Empowerment, and has made good on that pledge, as can be seen from the above. In addition the casino industry is committed to remaining at the very forefront of initiatives designed to promote the advancement of the black economic empowerment agenda throughout the country on an ongoing basis.

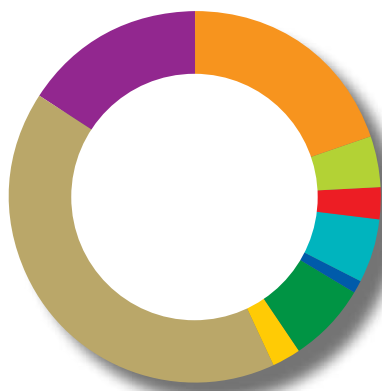
| Employment Equity | % Black People living with disabilities | % Senior Management | % Middle Management | % Junior Management | Score |
|-------------------|---|---------------------|---------------------|---------------------|-------|
| Gauteng           | 1.00%                                   | 49.86%              | 58.16%              | 74.15%              | 13.69 |
| Western Cape      | 0.31%                                   | 51.50%              | 59.86%              | 67.87%              | 13.10 |
| Eastern Cape      | 0.23%                                   | 43.33%              | 74.17%              | 67.47%              | 12.19 |
| KwaZulu-Natal     | 0.54%                                   | 39.71%              | 53.37%              | 61.53%              | 12.17 |
| Limpopo           | 0.00%                                   | 59.00%              | 45.59%              | 72.27%              | 11.89 |
| Mpumalanga        | 0.41%                                   | 37.50%              | 50.54%              | 77.08%              | 11.98 |
| Free State        | 1.11%                                   | 28.85%              | 50.74%              | 74.08%              | 11.69 |
| North West        | 0.09%                                   | 6.25%               | 55.68%              | 65.70%              | 8.22  |
| Northern Cape     | 0.29%                                   | 0.00%               | 64.83%              | 65.91%              | 8.17  |
| National Score    | 0.53%                                   | 42.39%              | 54.43%              | 71.05%              | 12.92 |



## National Gambling Statistics 2011 / 2012 Financial Year

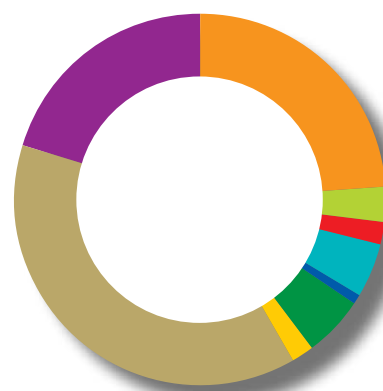
In 2012 the National Gambling Board (NGB) published its survey of national gambling statistics for the 2011/2012 financial year, ending 31 March 2012, in which it reported that gross gambling revenue for all sectors for the year was R18 billion, an 8% increase over the previous year's R17 billion.

GROSS GAMBLING REVENUE PER PROVINCE  
2011/2012 Financial Year



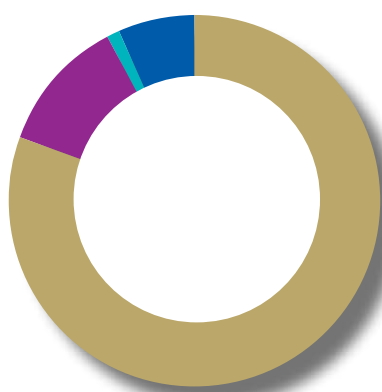
TOTAL R18 416 578 591 (all sectors)

TAX CONTRIBUTION PER PROVINCE  
2011/2012 Financial Year



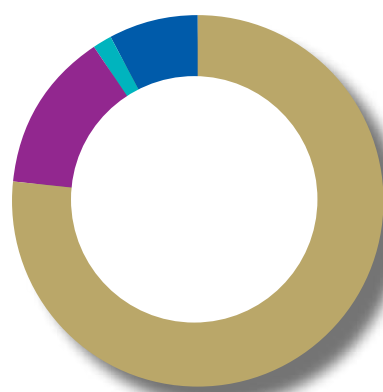
TOTAL R1 833 605 312 (all sectors)

GROSS GAMBLING REVENUE PER GAMBLING MODE  
2011/2012 Financial Year



TOTAL R18 416 578 591

TAX PER GAMBLING MODE  
2011/2012 Financial Year

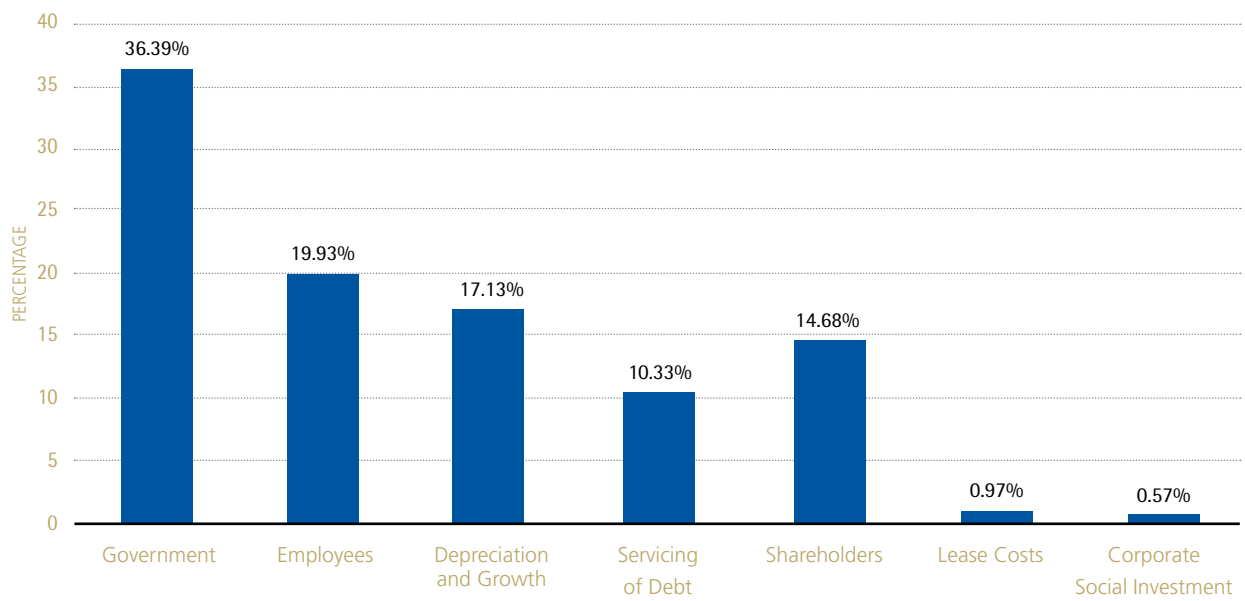


TOTAL R1 833 605 312

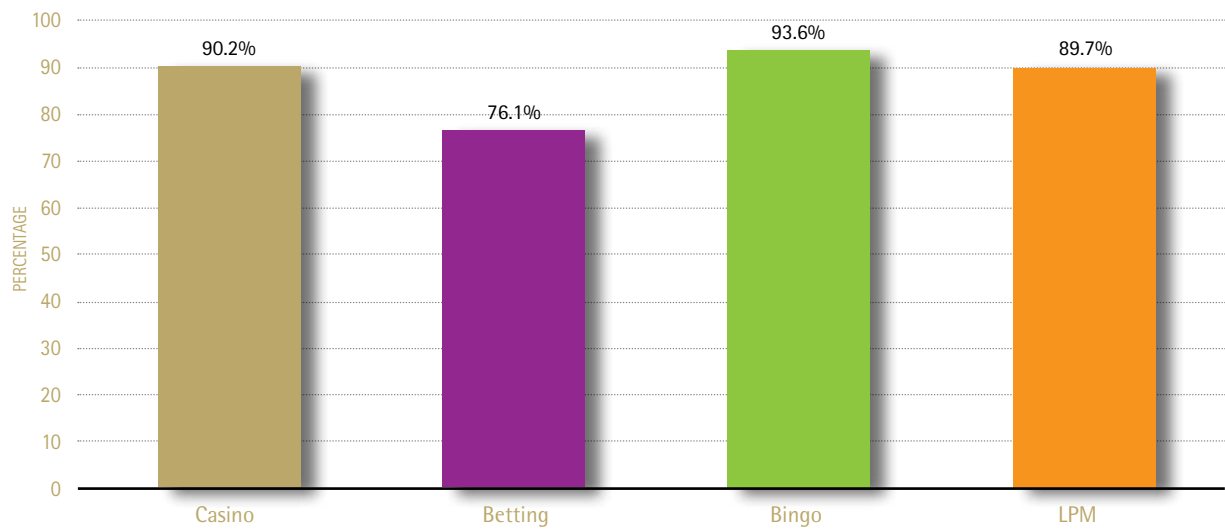




CASINO INDUSTRY VALUE ADDED STATEMENT:  
WHERE THE MONEY GOES



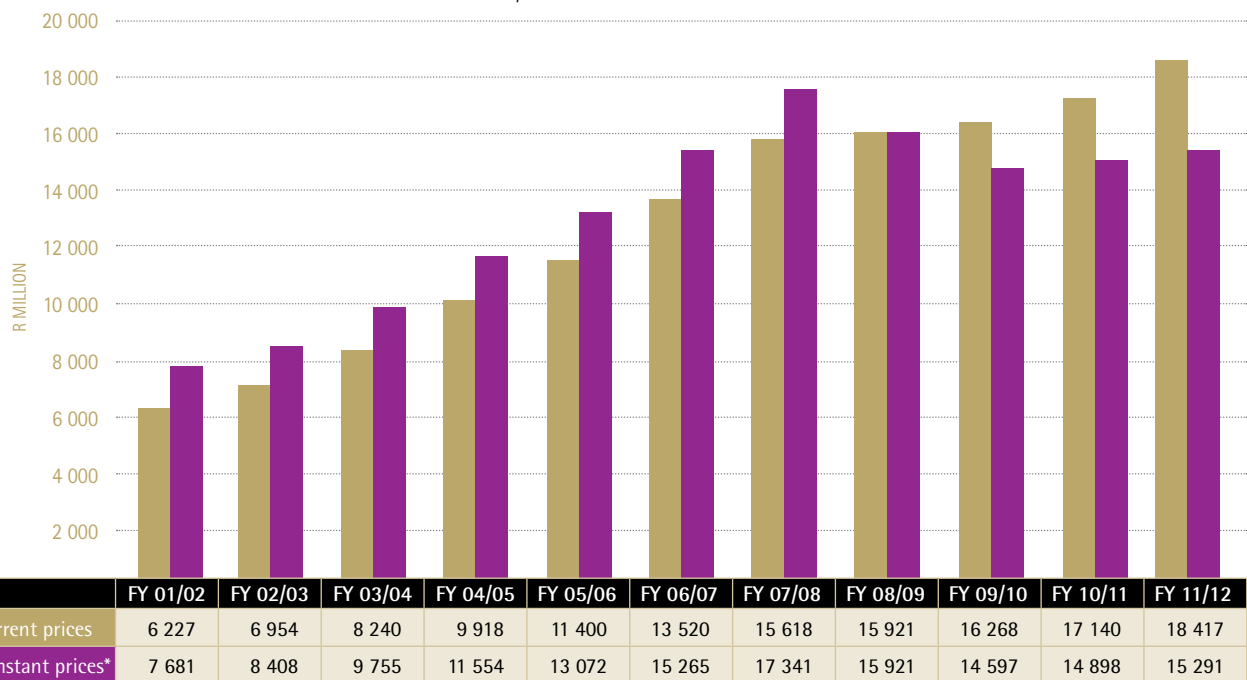
PERCENTAGE OF RETURN TO PLAYER/PUNTER PER GAMBLING MODE  
2012





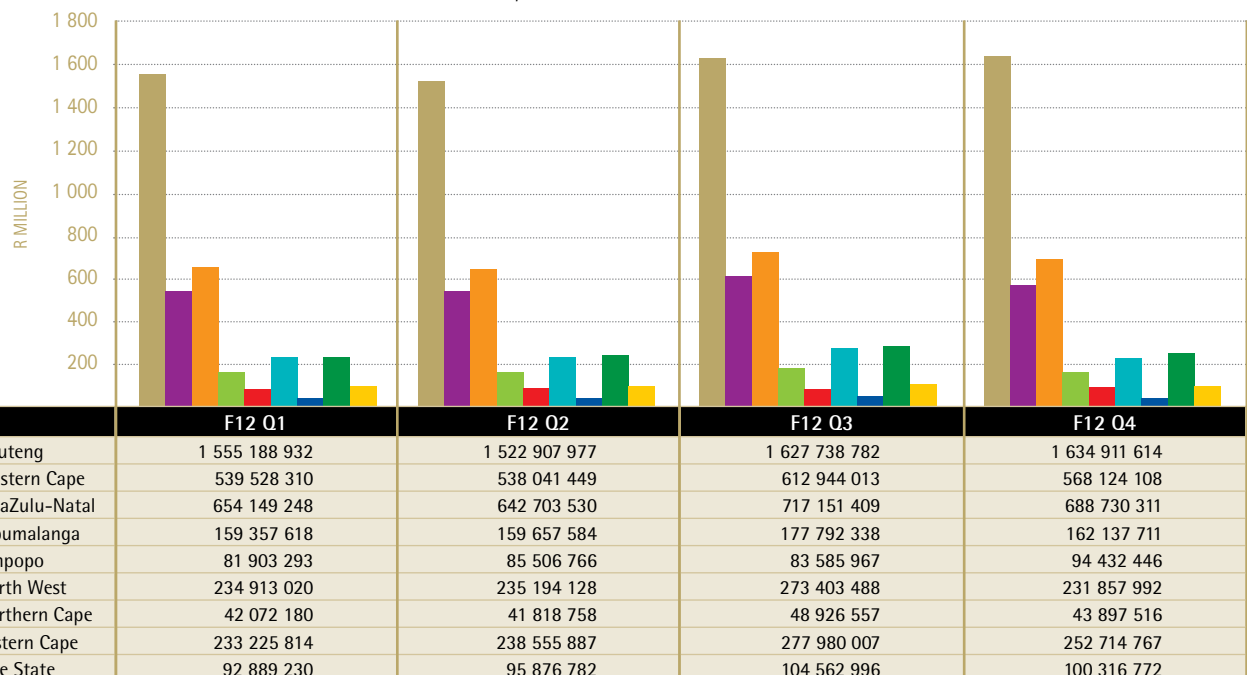
## National Gambling Statistics 2011 / 2012 Financial Year

INCREASE IN GAMBLING ACTIVITIES GROSS GAMBLING REVENUE ALL MODELS  
2011/2012 Financial Year



\*Constant 2008/2009 prices. Deflated with the Recreation and Cultural Services CPI.

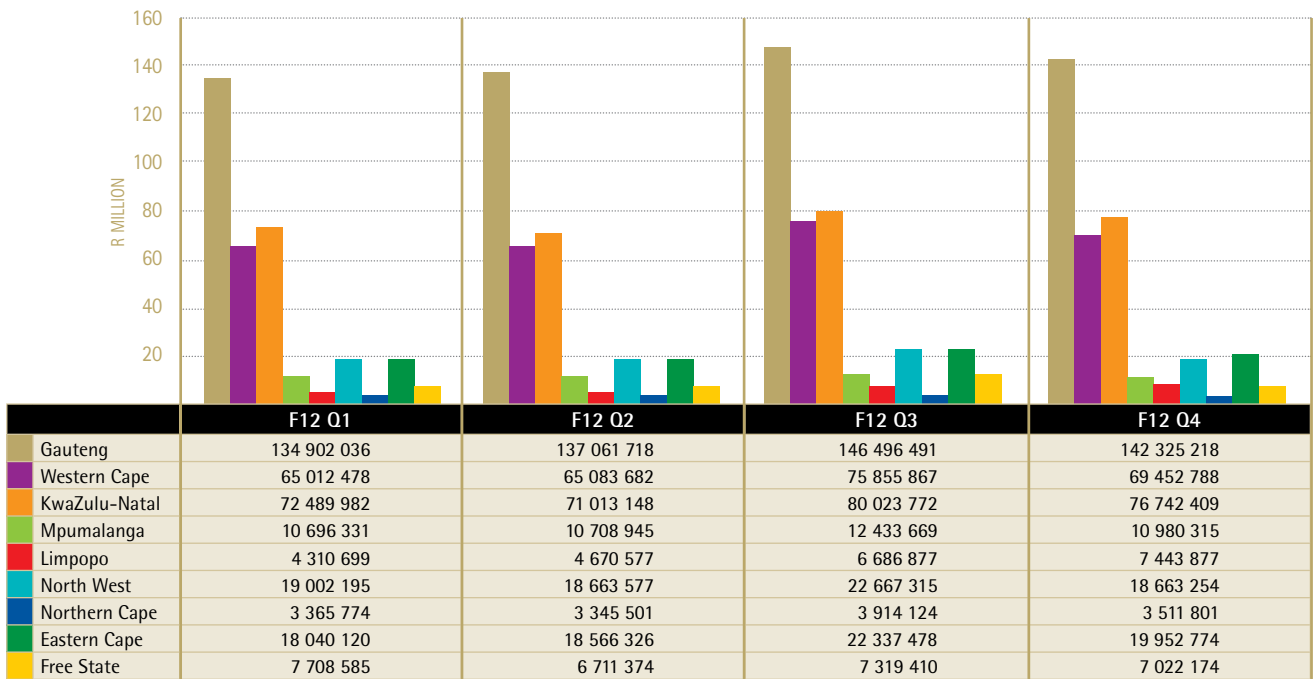
QUARTERLY CASINO GROSS GAMBLING REVENUE  
2011/2012 Financial Year



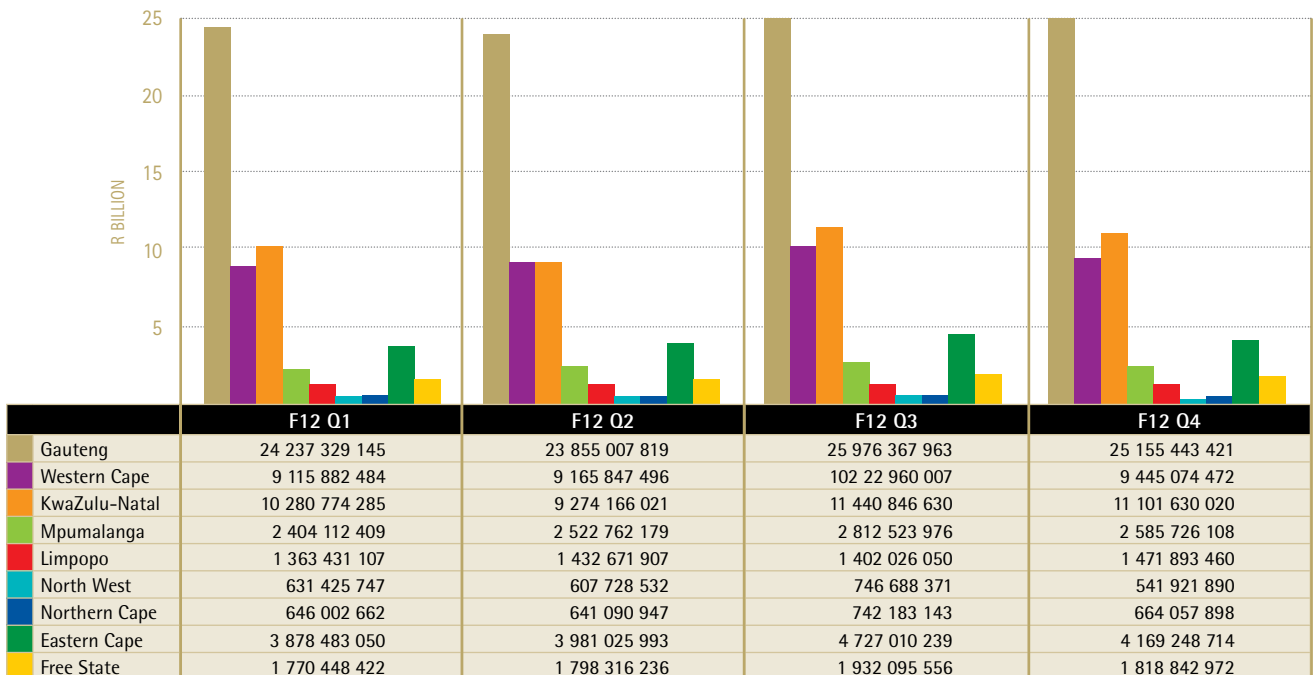




### QUARTERLY CASINO TAX / LEVIES 2011/2012 Financial Year

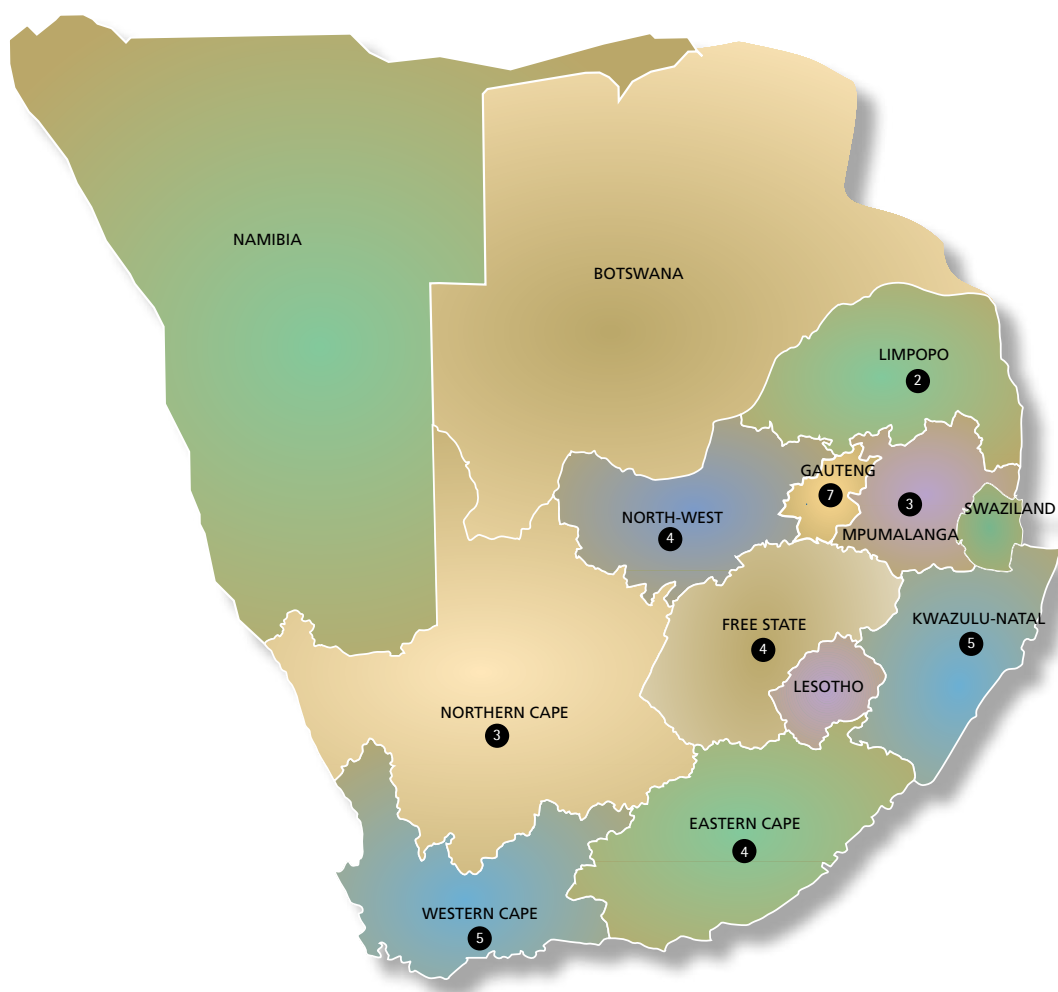


### QUARTERLY CASINO TURNOVER 2011/2012 Financial Year





## Overview of Casino Entertainment



CASINO GROUP HOLDING LICENCES IN SOUTH AFRICA

|               | Sun International | Peermont Global | London Clubs International | Tsogo Sun | Not CASA members | TOTAL |
|---------------|-------------------|-----------------|----------------------------|-----------|------------------|-------|
| Eastern Cape  | 2                 |                 |                            | 2         |                  | 4     |
| Free State    | 2                 | 1               |                            | 1         |                  | 4     |
| Gauteng       | 2                 | 1               | 1                          | 3         |                  | 7     |
| KwaZulu-Natal | 1                 | 1               |                            | 3         |                  | 5     |
| Limpopo       | 1                 | 1               |                            |           |                  | 2     |
| Mpumalanga    |                   | 1               |                            | 2         |                  | 3     |
| North West    | 2                 | 2               |                            |           |                  | 4     |
| Northern Cape | 1                 |                 |                            |           | 2                | 3     |
| Western Cape  | 2                 |                 |                            | 3         |                  | 5     |
| Total         | 13                | 7               | 1                          | 14        | 2                | 37    |



# Profile of South African Casinos



## ALL PROVINCES

|  |              |
|--|--------------|
| Current number of casinos (CASA members) | 35           |
| Proposed number of casinos               | 40           |
| Number of tables                         | 830          |
| Number of machines                       | 22 688       |
| Casino employees                         | 34 019       |
| Gross casino gaming revenue              | R 15 billion |
| Total State and Provincial taxes         | R 5 billion  |
| Casino levies paid to government         | R 1 billion  |
| Visitors                                 | 64 043 838   |
| Corporate Social Investment              | R 83 million |

## THEATRES

|                      |               |
|----------------------|---------------|
| No of theatres       | 16            |
| Capacity             | 18 081        |
| No of shows          | 2 352         |
| No of tickets sold   | 859 912       |
| Total revenue        | R 112 million |
| Employees - direct   | 111           |
| Employees - indirect | 886           |

## RESTAURANTS

|                       |                       |
|-----------------------|-----------------------|
| No of restaurants     | 161                   |
| Size                  | 64 009 m <sup>2</sup> |
| Capacity              | 29 146                |
| Employees - full time | 3 533                 |
| Casuals               | 1 772                 |
| Total annual turnover | R 1 billion           |

## FAST FOOD OUTLETS

|                       |               |
|-----------------------|---------------|
| No of outlets         | 82            |
| Employees - full time | 732           |
| Casuals               | 106           |
| Total annual turnover | R 204 million |

## CINEMAS

|                      |                       |
|----------------------|-----------------------|
| No of cinemas        | 62                    |
| Size                 | 24 963 m <sup>2</sup> |
| Capacity             | 11 030                |
| No of shows          | 96 688                |
| No of tickets sold   | 3 043 092             |
| Total Revenue        | R 126 million         |
| Employees - direct   | 148                   |
| Employees - indirect | 178                   |

## ENTERTAINMENT AREAS

|                       |                          |
|-----------------------|--------------------------|
| No of areas           | 63                       |
| Size                  | 2 042 105 m <sup>2</sup> |
| Capacity              | 44 152                   |
| No of guests          | 2 191 147                |
| Employees - full time | 672                      |
| Casuals               | 587                      |
| Total annual turnover | R 239 million            |

## RETAIL OUTLETS

|                       |               |
|-----------------------|---------------|
| No of shops           | 121           |
| Employees - full time | 609           |
| Casuals               | 92            |
| Total annual turnover | R 219 million |

## HOTELS

|                              |             |
|------------------------------|-------------|
| No of hotels                 | 48          |
| Size of hotels               | 7 805 rooms |
| No of beds                   | 11 396      |
| Ave occupancy percentage     | 73%         |
| Percentage foreign occupants | 6%          |
| No of guests                 | 2 315 531   |
| Employees - direct           | 1 348       |
| Employees - indirect         | 857         |
| Total annual turnover        | R 1 billion |

## CONFERENCE FACILITIES

|                       |                       |
|-----------------------|-----------------------|
| Size                  | 48 701 m <sup>2</sup> |
| Capacity              | 40 998                |
| No of conventions     | 10 384                |
| No of delegates       | 878 116               |
| Employees - direct    | 286                   |
| Employees - indirect  | 2 697                 |
| Total annual turnover | R 295 million         |

## SPORTING EVENTS

|                       |              |
|-----------------------|--------------|
| No of events          | 226          |
| No of participants    | 62 121       |
| No of spectators      | 85 408       |
| Employees - direct    | 2 129        |
| Employees - indirect  | 1 499        |
| Total annual turnover | R 76 million |

## TOTAL ANNUAL TURNOVER - OTHER FACILITIES

R 4 billion

## TOTAL EMPLOYEES - OTHER FACILITIES

18 242

## TOTAL EMPLOYEES - OTHER FACILITIES AND CASINOS

52 261



# Profile of South Africa Casinos by Province

2011 / 2012 Financial Year

## EASTERN CAPE

|                                  |              |
|----------------------------------|--------------|
| Current number of casinos        | 4            |
| Maximum permissible casinos      | 5            |
| Number of tables                 | 60           |
| Number of machines               | 2 047        |
| Casino employees                 | 2 993        |
| Gross casino gaming revenue      | R 1 billion  |
| Casino levies paid to government | R 79 million |
| Visitors                         | 6 326 965    |

## THEATRES

|                      |           |
|----------------------|-----------|
| No of theatres       | 3         |
| Capacity             | 1 244     |
| No of shows          | 102       |
| No of tickets sold   | 45 477    |
| Total revenue        | R 506 251 |
| Employees - direct   | 1         |
| Employees - indirect | 6         |

## RESTAURANTS

|                       |                      |
|-----------------------|----------------------|
| No of restaurants     | 16                   |
| Size                  | 7 731 m <sup>2</sup> |
| Capacity              | 2 412                |
| Employees - full time | 476                  |
| Casuals               | 222                  |
| Total annual turnover | R 81 million         |

## FAST FOOD OUTLETS

|                       |              |
|-----------------------|--------------|
| No of outlets         | 11           |
| Employees - full time | 72           |
| Casuals               | 14           |
| Total annual turnover | R 16 million |

## CINEMAS

|                      |                      |
|----------------------|----------------------|
| No of cinemas        | 12                   |
| Size                 | 6 776 m <sup>2</sup> |
| Capacity             | 1 728                |
| No of shows          | 18 961               |
| No of tickets sold   | 493 674              |
| Total Revenue        | R 21 million         |
| Employees - direct   | 63                   |
| Employees - indirect | 3                    |

## ENTERTAINMENT AREAS

|                        |                                  |
|------------------------|----------------------------------|
| No of areas            | 10                               |
| Types of entertainment | Games Arcade, Water park, Creche |
| Size                   | 21 249 m <sup>2</sup>            |
| Capacity               | 4 933                            |
| No of guests           | 115 710                          |
| Employees - full time  | 214                              |
| Casuals                | 21                               |
| Total annual turnover  | R 30 million                     |

## RETAIL OUTLETS

|                       |              |
|-----------------------|--------------|
| No of shops           | 31           |
| Employees - full time | 78           |
| Total annual turnover | R 24 million |

## HOTELS

|                              |              |
|------------------------------|--------------|
| No of hotels                 | 3            |
| Size of hotels               | 395 rooms    |
| No of beds                   | 716          |
| Ave occupancy percentage     | 77%          |
| Percentage foreign occupants | 4%           |
| No of guests                 | 223 703      |
| Employees - direct           | 87           |
| Employees - indirect         | 113          |
| Total annual turnover        | R 26 million |

## CONFERENCE FACILITIES

|                       |                      |
|-----------------------|----------------------|
| Size                  | 4 523 m <sup>2</sup> |
| Capacity              | 2 866                |
| No of conventions     | 269                  |
| No of delegates       | 11 477               |
| Employees - direct    | 5                    |
| Employees - indirect  | 228                  |
| Total annual turnover | R 3 million          |

## SPORTING EVENTS

|                       |                       |
|-----------------------|-----------------------|
| No of events          | 102                   |
| Type of events        | Golf, Running         |
| No of participants    | 9 376                 |
| Facilities used       | Golf Club, HWC Casino |
| Employees - direct    | 533                   |
| Employees - indirect  | 750                   |
| Total annual turnover | R 2 million           |

## 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% |





#### PORT ELIZABETH: THE BOARDWALK CASINO AND ENTERTAINMENT WORLD

|                          |                                  |
|--------------------------|----------------------------------|
| Date opened              | October 2010                     |
| Operator                 | Emfuleni Resorts (Pty) Ltd       |
| Management company       | Sun International Management Ltd |
| Total capital investment | R 811 million                    |
| Employees                | 799                              |
| Permanent                | 427                              |
| Outsourced               | 372                              |
| Slots                    | 1022                             |
| Tables                   | 26                               |
| Visitors                 | 3 014 373                        |

#### QUEENSTOWN: QUEEN'S CASINO

|                          |               |
|--------------------------|---------------|
| Date opened              | December 2007 |
| Operator                 | Tsogo Sun     |
| Total capital investment | R 7 million   |
| Employees                | 233           |
| Permanent                | 146           |
| Casuals                  | 87            |
| Slots                    | 180           |
| Tables                   | 6             |
| Visitors                 | 220 075       |

#### EAST LONDON: HEMINGWAYS CASINO

|  |                |
|--|----------------|
| Date opened                                      | September 2001 |
| Operator   | Tsogo Sun      |
| Total capital investment (construction underway) | R 476 million  |
| Employees  | 504            |
| Permanent  | 227            |
| Outsourced                                       | 277            |
| Slots  | 395            |
| Tables   | 12             |
| Visitors   | 2 405 410      |

#### MBIZANA: WILD COAST SUN

|                          |                                  |
|--------------------------|----------------------------------|
| Date opened              | December 1981                    |
| Operator                 | Transkei Sun International Ltd   |
| Management company       | Sun International Management Ltd |
| Total capital investment | R 470 million                    |
| Employees                | 1 457                            |
| Permanent                | 456                              |
| Casuals                  | 351                              |
| Outsourced               | 650                              |
| Slots                    | 450                              |
| Tables                   | 16                               |
| Visitors                 | 687 107                          |





# Profile of South Africa Casinos by Province

2011 / 2012 Financial Year

## FREE STATE

|                                  |               |
|----------------------------------|---------------|
| Current number of casinos        | 4             |
| Maximum permissible casinos      | 4             |
| Number of tables                 | 36            |
| Number of machines               | 883           |
| Casino employees                 | 1 053         |
| Gross casino gaming revenue      | R 394 million |
| Casino levies paid to government | R 29 million  |
| Visitors                         | 2 553 413     |

### THEATRES

|                      |          |
|----------------------|----------|
| No of theatres       | 1        |
| Capacity             | 180      |
| No of shows          | 416      |
| No of tickets sold   | 1 040    |
| Total revenue        | R 62 483 |
| Employees - direct   | 8        |
| Employees - indirect | 2        |

### RESTAURANTS

|                       |                      |
|-----------------------|----------------------|
| No of restaurants     | 4                    |
| Size                  | 1 191 m <sup>2</sup> |
| Capacity              | 640                  |
| Employees - full time | 124                  |
| Casuals               | 37                   |
| Total annual turnover | R 25 million         |

### FAST FOOD OUTLETS

|                       |             |
|-----------------------|-------------|
| No of outlets         | 2           |
| Employees - full time | 13          |
| Total annual turnover | R 2 million |

### ENTERTAINMENT AREAS

|                        |   |
|------------------------|---|
| No of areas            | 5   |
| Types of entertainment | Sports Bar, Floor Bar, Creche,<br>Bowling Alley, Games Arcade |
| Size                   | 1 537 m <sup>2</sup>  |
| Capacity               | 722   |
| No of guests           | 409 528   |
| Employees - full time  | 53  |
| Total annual turnover  | R 6 million   |

### RETAIL OUTLETS

|                       |              |
|-----------------------|--------------|
| No of shops           | 8            |
| Employees - full time | 201          |
| Total annual turnover | R 37 million |

### HOTELS

|                          |              |
|--------------------------|--------------|
| No of hotels             | 3            |
| Size of hotels           | 131 rooms    |
| No of beds               | 166          |
| Ave occupancy percentage | 72%          |
| No of guests             | 56 786       |
| Employees - direct       | 40           |
| Employees - indirect     | 38           |
| Total annual turnover    | R 19 million |

### CONFERENCE FACILITIES

|                       |                    |
|-----------------------|--------------------|
| Size                  | 814 m <sup>2</sup> |
| Capacity              | 765                |
| No of conventions     | 1 277              |
| No of delegates       | 39 861             |
| Employees - direct    | 14                 |
| Employees - indirect  | 186                |
| Total annual turnover | R 6 million        |

### SPORTING EVENTS

|                       |                            |
|-----------------------|----------------------------|
| No of events          | 1                          |
| Type of events        | Golf Tournament            |
| No of participants    | 108                        |
| Facilities used       | Golf Course and Banqueting |
| Employees - direct    | 8                          |
| Total annual turnover | R 47 368                   |

### PROVINCIAL GAMING TAX BASE

| Taxable revenue (millions) | Rates of tax |
|----------------------------|--------------|
|                            | 7.0%         |





#### 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 | R 110 million                                  |
| Employees                | 188  |
| Permanent                | 120  |
| Casuals                  | 30   |
| Outsourced               | 38   |
| Slots                    | 140  |
| Tables                   | 9  |
| Visitors                 | 369 753  |

#### WELKOM: GOLDFIELDS CASINO AND ENTERTAINMENT CENTRE

|                          |               |
|--------------------------|---------------|
| Date opened              | Dec 2003      |
| Operator                 | Tsogo Sun     |
| Total capital investment | R 149 million |
| Employees                | 246           |
| Permanent                | 188           |
| Outsourced               | 58            |
| Slots                    | 250           |
| Tables                   | 9             |
| Visitors                 | 917 859       |

#### BLOEMFONTEIN: WINDMILL CASINO AND ENTERTAINMENT CENTRE

|                          |                                  |
|--------------------------|----------------------------------|
| Date opened              | September 2005                   |
| Operator                 | Manguang Sun (Pty) Ltd           |
| Management company       | Sun International Management Ltd |
| Total capital investment | R 259 million                    |
| Employees                | 505                              |
| Permanent                | 196                              |
| Casuals                  | 2                                |
| Outsourced               | 307                              |
| Slots                    | 343                              |
| Tables                   | 18                               |
| Visitors                 | 1 093 695                        |



#### THABA 'NCHU: NALEDI SUN

|                          |                                      |
|--------------------------|--------------------------------------|
| Date opened              | May 1989                             |
| Operator                 | Sun International (South Africa) Ltd |
| Management company       | Sun International Management Ltd     |
| Total capital investment | R 18 million                         |
| Employees                | 114                                  |
| Permanent                | 71                                   |
| Outsourced               | 43                                   |
| Slots                    | 150                                  |
| Visitors                 | 172 106                              |





# Profile of South Africa Casinos by Province

2011 / 2012 Financial Year

## GAUTENG

|                                  |               |
|----------------------------------|---------------|
| Current number of casinos        | 7             |
| Maximum permissible casinos      | 7             |
| Number of tables                 | 322           |
| Number of machines               | 8 714         |
| Casino employees                 | 10 726        |
| Gross casino gaming revenue      | R 6 billion   |
| Casino levies paid to government | R 561 million |
| Visitors                         | 23 787 009    |

## THEATRES

|                      |              |
|----------------------|--------------|
| No of theatres       | 7            |
| Capacity             | 9 320        |
| No of shows          | 757          |
| No of tickets sold   | 638 907      |
| Total revenue        | R 30 million |
| Employees - direct   | 52           |
| Employees - indirect | 809          |

## RESTAURANTS

|                       |                       |
|-----------------------|-----------------------|
| No of restaurants     | 60                    |
| Size                  | 26 643 m <sup>2</sup> |
| Capacity              | 14 159                |
| Employees - full time | 1 311                 |
| Casuals               | 908                   |
| Total annual turnover | R 530 million         |

## FAST FOOD OUTLETS

|                       |              |
|-----------------------|--------------|
| No of outlets         | 27           |
| Employees - full time | 258          |
| Casuals               | 37           |
| Total annual turnover | R 74 million |

## CINEMAS

|                      |                       |
|----------------------|-----------------------|
| No of cinemas        | 27                    |
| Size                 | 12 003 m <sup>2</sup> |
| Capacity             | 5 614                 |
| No of shows          | 51 554                |
| No of tickets sold   | 1 354 745             |
| Total Revenue        | R 64 million          |
| Employees - direct   | 32                    |
| Employees - indirect | 108                   |

## ENTERTAINMENT AREAS

|                        |  |
|------------------------|--|
| No of areas            | 26   |
| Types of entertainment | Shows, Magic Company, Comedy Club, Creche, Ten Pin Bowling, Aquadome |
| Size                   | 13 503 m <sup>2</sup>  |
| Capacity               | 5 719  |
| No of guests           | 988 954  |
| Employees - full time  | 255  |
| Casuals                | 143  |
| Total annual turnover  | R 112 million  |

## RETAIL OUTLETS

|                       |               |
|-----------------------|---------------|
| No of shops           | 45            |
| Employees - full time | 245           |
| Casuals               | 65            |
| Total annual turnover | R 134 million |

## HOTELS

|                              |               |
|------------------------------|---------------|
| No of hotels                 | 15            |
| Size of hotels               | 1 825 rooms   |
| No of beds                   | 2 825         |
| Ave occupancy percentage     | 67%           |
| Percentage foreign occupants | 9%            |
| No of guests                 | 836 027       |
| Employees - direct           | 611           |
| Employees - indirect         | 341           |
| Total annual turnover        | R 425 million |

## CONFERENCE FACILITIES

|                       |                       |
|-----------------------|-----------------------|
| Size                  | 17 564 m <sup>2</sup> |
| Capacity              | 15 888                |
| No of conventions     | 5 278                 |
| No of delegates       | 478 005               |
| Employees - direct    | 99                    |
| Employees - indirect  | 1 165                 |
| Total annual turnover | R 145 million         |

## SPORTING EVENTS

|                       |   |
|-----------------------|---|
| No of events          | 30  |
| Type of events        | Golf Days, Boxing, Cycling, Soccer, Netball, Cricket                                  |
| No of participants    | 11 399  |
| No of spectators      | 10 713  |
| Facilities used       | Golf Course, Banqueting, Theatre, Car Park, Restaurants, Netball Fields, Soccer Field |
| Employees - direct    | 18  |
| Employees - indirect  | 6   |
| Total annual turnover | R 75 600  |

## PROVINCIAL GAMING TAX BASE

| Taxable revenue (millions) | Rates of tax |
|----------------------------|--------------|
|                            | 9%           |





#### MABOPANE: MORULA CASINO AND HOTEL

|                          |                                      |
|--------------------------|--------------------------------------|
| Date opened              | June 1987                            |
| Operator                 | Sun International (South Africa) Ltd |
| Management company       | Sun International Management Ltd     |
| Total capital investment | R 226 million                        |
| Employees                | 525                                  |
| Permanent                | 400                                  |
| Casuals                  | 20                                   |
| Outsourced               | 105                                  |
| Slots                    | 510                                  |
| Tables                   | 12                                   |
| Visitors                 | 653 926                              |

#### FOURWAYS: MONTECASINO

|                          |               |
|--------------------------|---------------|
| Date opened              | November 2000 |
| Operator                 | Tsogo Sun     |
| Total capital investment | R 2.8 billion |
| Employees                | 2 046         |
| Permanent                | 989           |
| Casuals                  | 34            |
| Outsourced               | 1 023         |
| Slots                    | 1 714         |
| Tables                   | 75            |
| Visitors                 | 10 131 710    |

#### JOHANNESBURG: GOLD REEF CITY CASINO

|                          |              |
|--------------------------|--------------|
| Date opened              | October 1998 |
| Operator                 | Tsogo Sun    |
| Total capital investment | R 2 billion  |
| Employees                | 1 638        |
| Permanent                | 969          |
| Casuals                  | 69           |
| Outsourced               | 600          |
| Slots                    | 1 600        |
| Tables                   | 50           |
| Visitors                 | 2 458 006    |

#### VANDERBIJLPARK: EMERALD RESORT AND CASINO

|                          |                                 |
|--------------------------|---------------------------------|
| Date opened              | December 1999                   |
| Operator                 | Emerald Safari Resort (Pty) Ltd |
| Management company       | London Clubs International      |
| Total capital investment | R 618 million                   |
| Employees                | 987                             |
| Permanent                | 322                             |
| Casuals                  | 140                             |
| Outsourced               | 525                             |
| Slots                    | 596                             |
| Tables                   | 31                              |
| Visitors                 | 1 177 486                       |

#### KEMPTON PARK: EMPERORS PALACE HOTEL CASINO CONVENTION RESORT

|                          |                           |
|--------------------------|---------------------------|
| Date opened              | December 1998             |
| Operator                 | Peermont Global (Pty) Ltd |
| Management company       | Peermont Global (Pty) Ltd |
| Total capital investment | R 2 billion               |
| Employees                | 2 458                     |
| Permanent                | 1 334                     |
| Casuals                  | 180                       |
| Outsourced               | 944                       |
| Slots                    | 1 724                     |
| Tables                   | 67                        |
| Visitors                 | 4 828 306                 |

#### BRAKPAN: CARNIVAL CITY

|                          |                                  |
|--------------------------|----------------------------------|
| Date opened              | January 1998                     |
| Operator                 | Afrisun Gauteng (Pty) Ltd        |
| Management company       | Sun International Management Ltd |
| Total capital investment | R 1 billion                      |
| Employees                | 1 831                            |
| Permanent                | 723                              |
| Outsourced               | 1 108                            |
| Slots                    | 1 758                            |
| Tables                   | 59                               |
| Visitors                 | 2 715 567                        |

#### WEST RAND: SILVERSTAR CASINO

|                          |               |
|--------------------------|---------------|
| Date opened              | December 2007 |
| Operator                 | Tsogo Sun     |
| Total capital investment | R 1 billion   |
| Employees                | 1 241         |
| Permanent                | 524           |
| Casuals                  | 10            |
| Outsourced               | 707           |
| Slots                    | 812           |
| Tables                   | 28            |
| Visitors                 | 1 822 008     |





# Profile of South Africa Casinos by Province

2011 / 2012 Financial Year

## KWAZULU-NATAL

|                                  |               |
|----------------------------------|---------------|
| Current number of casinos        | 5             |
| Maximum permissible casinos      | 5             |
| Number of tables                 | 146           |
| Number of machines               | 3 533         |
| Casino employees                 | 4 448         |
| Gross casino gaming revenue      | R 3 billion   |
| Casino levies paid to government | R 300 million |
| Visitors                         | 14 326 885    |

### THEATRES

|                      |             |
|----------------------|-------------|
| No of theatres       | 1           |
| Capacity             | 577         |
| No of shows          | 130         |
| No of tickets sold   | 46 146      |
| Total revenue        | R 5 million |
| Employees - indirect | 3           |

### RESTAURANTS

|                       |                       |
|-----------------------|-----------------------|
| No of restaurants     | 34                    |
| Size                  | 12 980 m <sup>2</sup> |
| Capacity              | 4 453                 |
| Employees - full time | 740                   |
| Casuals               | 125                   |
| Total annual turnover | R 217 million         |

### FAST FOOD OUTLETS

|                       |              |
|-----------------------|--------------|
| No of outlets         | 16           |
| Employees - full time | 205          |
| Casuals               | 52           |
| Total annual turnover | R 71 million |

### CINEMAS

|                      |                      |
|----------------------|----------------------|
| No of cinemas        | 8                    |
| Size                 | 3 579 m <sup>2</sup> |
| Capacity             | 1 501                |
| No of shows          | 2 920                |
| No of tickets sold   | 717 554              |
| Total Revenue        | R 19 million         |
| Employees - direct   | 10                   |
| Employees - indirect | 20                   |

## ENTERTAINMENT AREAS

|                        |                                   |
|------------------------|-----------------------------------|
| No of areas            | 5                                 |
| Types of entertainment | Games Arcade, Night Club, Funland |
| Size                   | 2 881 m <sup>2</sup>              |
| Capacity               | 1 470                             |
| No of guests           | 78 948                            |
| Employees - full time  | 22                                |
| Casuals                | 24                                |
| Total annual turnover  | R 8 million                       |

## RETAIL OUTLETS

|                       |              |
|-----------------------|--------------|
| No of shops           | 7            |
| Employees - full time | 23           |
| Casuals               | 13           |
| Total annual turnover | R 11 million |

## HOTELS

|                              |              |
|------------------------------|--------------|
| No of hotels                 | 6            |
| Size of hotels               | 2 034 rooms  |
| No of beds                   | 403          |
| Ave occupancy percentage     | 67%          |
| Percentage foreign occupants | 3%           |
| No of guests                 | 208 478      |
| Employees - direct           | 187          |
| Employees - indirect         | 6            |
| Total annual turnover        | R 99 million |

## CONFERENCE FACILITIES

|                       |                      |
|-----------------------|----------------------|
| Size                  | 4 324 m <sup>2</sup> |
| Capacity              | 2 339                |
| No of conventions     | 717                  |
| No of delegates       | 122 258              |
| Employees - direct    | 50                   |
| Employees - indirect  | 67                   |
| Total annual turnover | R 30 million         |

## SPORTING EVENTS

|                       |                                 |
|-----------------------|---------------------------------|
| No of events          | 15                              |
| Type of events        | Kickboxing, Golf, Various       |
| No of participants    | 18 575                          |
| No of spectators      | 6 493                           |
| Facilities used       | Imbizo, Golf Course, Banqueting |
| Employees - direct    | 41                              |
| Employees - indirect  | 92                              |
| Total annual turnover | R 260 921                       |

## PROVINCIAL GAMING TAX BASE

| Taxable revenue (millions) | Rates of tax |
|----------------------------|--------------|
| 30                         | 9.5%         |
| >30                        | 12.5%        |





#### DURBAN: SUNCOAST CASINO AND ENTERTAINMENT WORLD

|                          |              |
|--------------------------|--------------|
| Date opened              | October 2002 |
| Operator                 | Tsogo Sun    |
| Total capital investment | R 1 billion  |
| Employees                | 1 678        |
| Permanent                | 372          |
| Casuals                  | 579          |
| Outsourced               | 727          |
| Slots                    | 1 354        |
| Tables                   | 56           |
| Visitors                 | 7 736 604    |

#### NEWCASTLE: BLACKROCK CASINO

|                          |                |
|--------------------------|----------------|
| Date opened              | September 1999 |
| Operator                 | Tsogo Sun      |
| Total capital investment | R 123 million  |
| Employees                | 339            |
| Permanent                | 123            |
| Casuals                  | 112            |
| Outsourced               | 104            |
| Slots                    | 250            |
| Tables                   | 7              |
| Visitors                 | 500 283        |

#### UMHLANGA: SIBAYA CASINO AND ENTERTAINMENT KINGDOM

|                          |                                  |
|--------------------------|----------------------------------|
| Date opened              | December 2004                    |
| Operator                 | Afrisun KZN (Pty) Ltd            |
| Management company       | Sun International Management Ltd |
| Total capital investment | R 992 million                    |
| Employees                | 1 781                            |
| Permanent                | 592                              |
| Casuals                  | 40                               |
| Outsourced               | 1 149                            |
| Slots                    | 1 212                            |
| Tables                   | 48                               |
| Visitors                 | 3 457 549                        |

#### PIETERMARITZBURG: GOLDEN HORSE CASINO

|                          |                |
|--------------------------|----------------|
| Date opened              | September 2001 |
| Operator                 | Tsogo Sun      |
| Total capital investment | R 422 million  |
| Employees                | 407            |
| Permanent                | 261            |
| Outsourced               | 146            |
| Slots                    | 450            |
| Tables                   | 23             |
| Visitors                 | 1 762 449      |

#### EMPANGENI: UMFOLOZI HOTEL CASINO CONVENTION RESORT

|                          |  |
|--------------------------|--|
| Date opened              | May 2002                                   |
| Operator                 | Peermont Global (KZN) (Pty) Ltd            |
| Management company       | Peermont Global Management (KZN) (Pty) Ltd |
| Total capital investment | R 192 million                              |
| Employees                | 243  |
| Permanent                | 215  |
| Outsourced               | 28   |
| Slots                    | 267  |
| Tables                   | 12   |
| Visitors                 | 870 000                                    |





# Profile of South Africa Casinos by Province

2011 / 2012 Financial Year

## LIMPOPO

|                                  |               |
|----------------------------------|---------------|
| Current number of casinos        | 2             |
| Maximum permissible casinos      | 3             |
| Number of tables                 | 24            |
| Number of machines               | 540           |
| Casino employees                 | 934           |
| Gross casino gaming revenue      | R 345 million |
| Casino levies paid to government | R 23 million  |
| Visitors                         | 1 704 884     |

### RESTAURANTS

|                       |                    |
|-----------------------|--------------------|
| No of restaurants     | 2                  |
| Size                  | 622 m <sup>2</sup> |
| Capacity              | 300                |
| Employees - full time | 40                 |
| Casuals               | 32                 |
| Total annual turnover | R 11 million       |

### FAST FOOD OUTLETS

|                       |             |
|-----------------------|-------------|
| No of outlets         | 2           |
| Employees - full time | 15          |
| Casuals               | 3           |
| Total annual turnover | R 6 million |

### ENTERTAINMENT AREA

|                        |                    |
|------------------------|--------------------|
| No of areas            | 1                  |
| Types of entertainment | Sports Bar         |
| Size                   | 431 m <sup>2</sup> |
| Capacity               | 300                |
| No of guests           | 14 500             |
| Employees - full time  | 15                 |
| Total annual turnover  | R 2 million        |

### RETAIL OUTLETS

|                       |             |
|-----------------------|-------------|
| No of shops           | 3           |
| Employees - full time | 24          |
| Total annual turnover | R 3 million |

### HOTELS

|                              |              |
|------------------------------|--------------|
| No of hotels                 | 2            |
| Size of hotels               | 184 rooms    |
| No of beds                   | 237          |
| Ave occupancy percentage     | 71%          |
| Percentage foreign occupants | 6%           |
| No of guests                 | 62 332       |
| Employees - direct           | 50           |
| Employees - indirect         | 14           |
| Total annual turnover        | R 29 million |

### CONFERENCE FACILITIES

|                       |                      |
|-----------------------|----------------------|
| Size                  | 2 087 m <sup>2</sup> |
| Capacity              | 1 491                |
| No of conventions     | 247                  |
| No of delegates       | 41 772               |
| Employees - direct    | 10                   |
| Employees - indirect  | 60                   |
| Total annual turnover | R 5 million          |

### PROVINCIAL GAMING TAX BASE

|                            |              |
|----------------------------|--------------|
| Taxable revenue (millions) | Rates of tax |
|                            | 6%           |







#### POLOKWANE: MEROPA LEISURE AND ENTERTAINMENT (PTY) LTD

|                          |  |
|--------------------------|--|
| Date opened              | March 2002                                 |
| Operator                 | Meropa Leisure and Entertainment (Pty) Ltd |
| Management company       | Sun International Management Ltd           |
| Total capital investment | R 224 million                              |
| Employees                | 604  |
| Permanent                | 223  |
| Casuals                  | 9  |
| Outsourced               | 372  |
| Slots                    | 390  |
| Tables                   | 17   |
| Visitors                 | 1 145 429                                  |

#### THOHOYANDOU: KHORONI HOTEL CASINO CONVENTION RESORT

|                          |   |
|--------------------------|---|
| Date opened              | October 2006                                |
| Operator                 | Peermont Global (Limpopo) (Pty) Ltd         |
| Management company       | Peermont Global Management (NW&L) (Pty) Ltd |
| Total capital investment | R 25 million                                |
| Employees                | 330   |
| Permanent                | 181   |
| Casuals                  | 12  |
| Outsourced               | 137   |
| Slots                    | 150   |
| Tables                   | 7   |
| Visitors                 | 559 455                                     |





# Profile of South Africa Casinos by Province

2011 / 2012 Financial Year

## MPUMALANGA

|                                  |               |
|----------------------------------|---------------|
| Current number of casinos        | 3             |
| Maximum permissible casinos      | 4             |
| Number of tables                 | 46            |
| Number of machines               | 1 104         |
| Casino employees                 | 1 238         |
| Gross casino gaming revenue      | R 659 million |
| Casino levies paid to government | R 45 million  |
| Visitors                         | 4 176 277     |

### RESTAURANTS

|                       |                    |
|-----------------------|--------------------|
| No of restaurants     | 5                  |
| Size                  | 880 m <sup>2</sup> |
| Capacity              | 530                |
| Employees - full time | 67                 |
| Casuals               | 74                 |
| Total annual turnover | R 28 million       |

### FAST FOOD OUTLETS

|                       |             |
|-----------------------|-------------|
| No of outlets         | 1           |
| Employees - full time | 18          |
| Total annual turnover | R 2 million |

### CINEMAS

|                    |                    |
|--------------------|--------------------|
| No of cinemas      | 7                  |
| Size               | 164 m <sup>2</sup> |
| Capacity           | 1 110              |
| No of shows        | 17 768             |
| No of tickets sold | 295 160            |
| Total Revenue      | R 13 million       |
| Employees - direct | 39                 |

### ENTERTAINMENT AREAS

|                        |   |
|------------------------|---|
| No of areas            | 5   |
| Types of entertainment | Magic Company, Ten Pin Bowling, Karaoke Show, Shows |
| Size                   | 1 032 m <sup>2</sup>                                |
| Capacity               | 950   |
| No of guests           | 35 839  |
| Employees - full time  | 20  |
| Casuals                | 366   |
| Total annual turnover  | R 13 million  |

### RETAIL OUTLETS

|                       |             |
|-----------------------|-------------|
| No of shops           | 3           |
| Employees - full time | 8           |
| Casuals               | 2           |
| Total annual turnover | R 2 million |

### HOTELS

|                              |              |
|------------------------------|--------------|
| No of hotels                 | 5            |
| Size of hotels               | 497 rooms    |
| No of beds                   | 748          |
| Ave occupancy percentage     | 68%          |
| Percentage foreign occupants | 8%           |
| No of guests                 | 154 415      |
| Employees - direct           | 84           |
| Employees - indirect         | 88           |
| Total annual turnover        | R 79 million |

### CONFERENCE FACILITIES

|                       |                      |
|-----------------------|----------------------|
| Size                  | 2 708 m <sup>2</sup> |
| Capacity              | 2 214                |
| No of conventions     | 591                  |
| No of delegates       | 34 907               |
| Employees - direct    | 9                    |
| Employees - indirect  | 400                  |
| Total annual turnover | R 9 million          |

### SPORTING EVENTS

|                       |                                |
|-----------------------|--------------------------------|
| No of events          | 52                             |
| Type of events        | Golf, Screening various events |
| No of participants    | 11 540                         |
| No of spectators      | 1 050                          |
| Facilities used       | Golf Course, Country Clubs     |
| Employees - direct    | 111                            |
| Employees - indirect  | 51                             |
| Total annual turnover | R 3 million                    |

### PROVINCIAL GAMING TAX BASE

| Taxable revenue (millions) |         | Rates of Tax |
|----------------------------|---------|--------------|
| 0-10                       |         | 5.0%         |
| 10-15                      | 500 000 | 7.5%         |
| >15                        | 875 000 | 10.0%        |





#### WITBANK: THE RIDGE CASINO

|                          |               |
|--------------------------|---------------|
| Date opened              | March 1998    |
| Operator                 | Tsogo Sun     |
| Total capital investment | R 382 million |
| Employees                | 469           |
| Permanent                | 238           |
| Outsourced               | 231           |
| Slots                    | 426           |
| Tables                   | 18            |
| Visitors                 | 2 300 244     |

#### NELSPRUIT: EMNOTWENI CASINO

|                          |               |
|--------------------------|---------------|
| Date opened              | October 1997  |
| Operator                 | Tsogo Sun     |
| Total capital investment | R 170 million |
| Employees                | 319           |
| Permanent                | 199           |
| Casuals                  | 2             |
| Outsourced               | 118           |
| Slots                    | 367           |
| Tables                   | 10            |
| Visitors                 | 1 343 260     |

#### SECUNDA: GRACELAND HOTEL, CASINO AND COUNTRY CLUB

|                          |  |
|--------------------------|--|
| Date opened              | October 1997                                     |
| Operator                 | Peermont Global<br>(Southern Highveld) (Pty) Ltd |
| Management company       | Peermont Global (Pty) Ltd                        |
| Total capital investment | R 251 million                                    |
| Employees                | 450  |
| Permanent                | 268  |
| Outsourced               | 182  |
| Slots                    | 311  |
| Tables                   | 18   |
| Visitors                 | 532 773  |





# Profile of South Africa Casinos by Province

2011 / 2012 Financial Year

## NORTHERN CAPE

|  |               |
|--|---------------|
| Current number of CASA-affiliated casinos              | 1             |
| Non-casino affiliated casinos (ie excluded in figures) | 2             |
| Maximum permissible casinos                            | 3             |
| Number of tables                                       | 11            |
| Number of machines                                     | 280           |
| Casino employees                                       | 254           |
| Gross casino gaming revenue                            | R 177 million |
| Casino levies paid to government                       | R 14 million  |
| Visitors   | 632 033       |

### RESTAURANTS

|                       |                    |
|-----------------------|--------------------|
| No of restaurants     | 1                  |
| Size                  | 279 m <sup>2</sup> |
| Capacity              | 86                 |
| Employees - full time | 35                 |
| Total annual turnover | R 3 million        |



### ENTERTAINMENT AREA

|                        |                    |
|------------------------|--------------------|
| No of areas            | 1                  |
| Types of entertainment | Live entertainment |
| Size                   | 358 m <sup>2</sup> |
| Capacity               | 250                |
| No of guests           | 20 150             |
| Employees - full time  | 12                 |
| Casuals                | 2                  |
| Total annual turnover  | R 1 million        |

### RETAIL OUTLETS

|                       |             |
|-----------------------|-------------|
| No of shops           | 1           |
| Employees - full time | 5           |
| Total annual turnover | R 2 million |

### HOTELS

|                              |          |
|------------------------------|----------|
| No of hotels                 | 1        |
| Size of hotels               | 90 rooms |
| No of beds                   | 120      |
| Ave occupancy percentage     | 80%      |
| Percentage foreign occupants | 4%       |
| No of guests                 | 39 106   |
| Employees - direct           | 6        |
| Employees - indirect         | 6        |

### CONFERENCE FACILITIES

|                       |                    |
|-----------------------|--------------------|
| Size                  | 440 m <sup>2</sup> |
| Capacity              | 180                |
| No of conventions     | 113                |
| No of delegates       | 6 994              |
| Employees - direct    | 4                  |
| Employees - indirect  | 20                 |
| Total annual turnover | R 2 million        |

### PROVINCIAL GAMING TAX BASE

|                            |              |
|----------------------------|--------------|
| Taxable revenue (millions) | Rates of tax |
|                            | 8.0%         |





#### KIMBERLEY: FLAMINGO CASINO

|                          |                                  |
|--------------------------|----------------------------------|
| Date opened              | March 2002                       |
| Operator                 | Teemane (Pty) Ltd                |
| Management company       | Sun International Management Ltd |
| Total capital investment | R 166 million                    |
| Employees                | 254                              |
| Permanent                | 162                              |
| Outsourced               | 92                               |
| Slots                    | 280                              |
| Tables                   | 11                               |
| Visitors                 | 632 033                          |

#### DESERT PALACE

NOT A MEMBER OF CASA

#### KURUMAN: LEITLHO RESORT AND ENTERTAINMENT WORLD

NOT A MEMBER OF CASA





# Profile of South Africa Casinos by Province

2011 / 2012 Financial Year

## NORTH WEST

|                                  |               |
|----------------------------------|---------------|
| Current number of casinos        | 4             |
| Maximum permissible casinos      | 4             |
| Number of tables                 | 71            |
| Number of machines               | 1 774         |
| Casino employees                 | 9 206         |
| Gross casino gaming revenue      | R 975 million |
| Casino levies paid to government | R 79 million  |
| Visitors                         | 2 592 420     |

### THEATRES

|                                 |                      |
|---------------------------------|----------------------|
| No of theatres                  | 3                    |
| Size of expansion/refurbishment | 3 188 m <sup>2</sup> |
| Capacity                        | 6 600                |
| No of shows                     | 293                  |
| No of tickets sold              | 23 672               |
| Total revenue                   | R 69 million         |
| Employees - direct              | 50                   |
| Employees - indirect            | 61                   |

### RESTAURANTS

|                       |                      |
|-----------------------|----------------------|
| No of restaurants     | 22                   |
| Size                  | 7 591 m <sup>2</sup> |
| Capacity              | 4 448                |
| Employees - full time | 310                  |
| Casuals               | 274                  |
| Total annual turnover | R 125 million        |

### CINEMAS

|               |                    |
|---------------|--------------------|
| No of cinemas | 2                  |
| Size          | 200 m <sup>2</sup> |
| Capacity      | 203                |
| No of shows   | 3 660              |

### ENTERTAINMENT AREAS

|                        |  |
|------------------------|--|
| No of areas            | 2  |
| Types of entertainment | Super Bowl, Putt-putt,<br>Zip Slide, Games Arcade, Revue Bar |
| Size                   | 1 973 599 m <sup>2</sup>                                     |
| Capacity               | 22 700   |
| No of guests           | 282 023  |
| Employees - full time  | 39   |
| Casuals                | 23   |
| Total annual turnover  | R 38 million   |

### RETAIL OUTLETS

|                       |             |
|-----------------------|-------------|
| No of shops           | 18          |
| Employees - full time | 7           |
| Total annual turnover | R 2 million |

### HOTELS

|                              |               |
|------------------------------|---------------|
| No of hotels                 | 9             |
| Size of hotels               | 2 413 rooms   |
| No of beds                   | 5 805         |
| Ave occupancy percentage     | 72%           |
| Percentage foreign occupants | 4%            |
| No of guests                 | 611 150       |
| Employees - direct           | 199           |
| Employees - indirect         | 204           |
| Total annual turnover        | R 529 million |

### CONFERENCE FACILITIES

|                       |                       |
|-----------------------|-----------------------|
| Size                  | 13 857 m <sup>2</sup> |
| Capacity              | 13 535                |
| No of conventions     | 1 583                 |
| No of delegates       | 124 126               |
| Employees - direct    | 55                    |
| Employees - indirect  | 546                   |
| Total annual turnover | R 92 million          |

### SPORTING EVENTS

|                       |   |
|-----------------------|---|
| No of events          | 21  |
| Type of events        | Golf, Motor Cross, Tennis, Swimming           |
| No of participants    | 10 148  |
| No of spectators      | 65 652  |
| Facilities used       | Golf Course, Motor Cross Track, Swimming Pool |
| Employees - direct    | 1 418   |
| Employees - indirect  | 600   |
| Total annual turnover | R 71 million                                  |

### PROVINCIAL GAMING TAX BASE

| Taxable revenue (millions) |         | Rates of Tax |
|----------------------------|---------|--------------|
| <4                         |         | 4.0%         |
| 4-8                        | 160 000 | 7.0%         |
| 8-12                       | 440 000 | 8.0%         |
| >12                        | 670 000 | 10.0%        |





#### MMABATHO: MMABATHO PALMS CASINO HOTEL CONVENTION RESORT

|                          |   |
|--------------------------|---|
| Date opened              | January 1999                                |
| Operator                 | Peermont Global (North West) (Pty) Ltd      |
| Management company       | Peermont Global Management (NW&L) (Pty) Ltd |
| Total capital investment | R 252 million                               |
| Employees                | 302   |
| Permanent                | 150   |
| Outsourced               | 152   |
| Slots                    | 155   |
| Tables                   | 8   |
| Visitors                 | 414 197                                     |

#### KLERKSDORP: RIO HOTEL, CASINOS AND CONVENTION RESORT

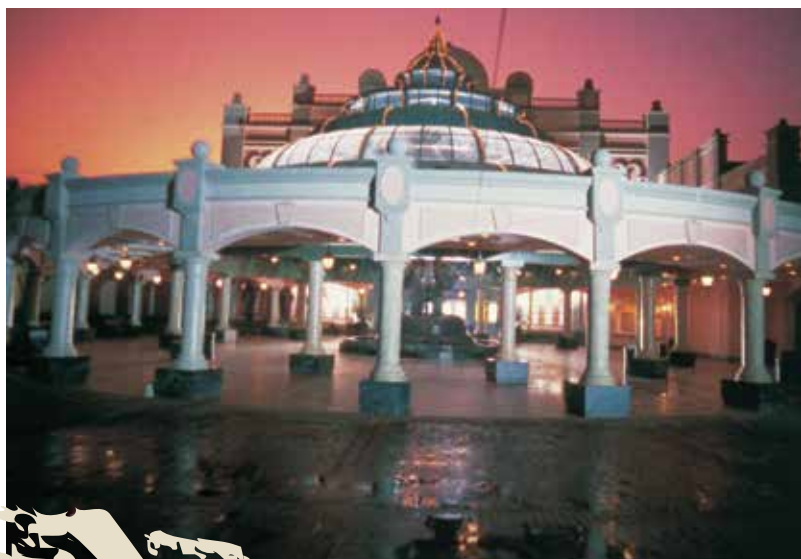
|                          |   |
|--------------------------|---|
| Date opened              | September 2004                              |
| Operator                 | Peermont Global (North West) (Pty) Ltd      |
| Management company       | Peermont Global Management (NW&L) (Pty) Ltd |
| Total capital investment | R 223 million                               |
| Employees                | 311   |
| Permanent                | 241   |
| Casuals                  | 8   |
| Outsourced               | 62  |
| Slots                    | 274   |
| Tables                   | 11  |
| Visitors                 | 301 960                                     |

#### PILANESBURG: SUN CITY RESORT

|                          |                                      |
|--------------------------|--------------------------------------|
| Date opened              | December 1979                        |
| Operator                 | Sun International (South Africa) Ltd |
| Management company       | Sun International Management Ltd     |
| Total capital investment | R 3 billion                          |
| Employees                | 7 529                                |
| Permanent                | 1 418                                |
| Casuals                  | 1 547                                |
| Outsourced               | 4 564                                |
| Slots                    | 645                                  |
| Tables                   | 33                                   |
| Visitors                 | 1 267 263                            |

#### HAMMANSKRAAL: THE CAROUSEL CASINO AND ENTERTAINMENT WORLD

|                          |                                      |
|--------------------------|--------------------------------------|
| Date opened              | November 1991                        |
| Operator                 | Sun International (South Africa) Ltd |
| Management company       | Sun International Management Ltd     |
| Total capital investment | R 310 million                        |
| Employees                | 1 064                                |
| Permanent                | 285                                  |
| Casuals                  | 39                                   |
| Outsourced               | 740                                  |
| Slots                    | 700                                  |
| Tables                   | 19                                   |
| Visitors                 | 609 000                              |





# Profile of South Africa Casinos by Province

2011 / 2012 Financial Year

## WESTERN CAPE

|                                  |               |
|----------------------------------|---------------|
| Current number of casinos        | 5             |
| Maximum permissible casinos      | 5             |
| Number of tables                 | 114           |
| Number of machines               | 3 813         |
| Casino employees                 | 3 167         |
| Gross casino gaming revenue      | R 2 billion   |
| Casino levies paid to government | R 275 million |
| Visitors                         | 7 943 952     |

### THEATRES

|                      |             |
|----------------------|-------------|
| No of theatres       | 1           |
| Capacity             | 160         |
| No of shows          | 654         |
| No of tickets sold   | 104 670     |
| Total revenue        | R 7 million |
| Employees - indirect | 5           |

### RESTAURANTS

|                       |                      |
|-----------------------|----------------------|
| No of restaurants     | 17                   |
| Size                  | 6 092 m <sup>2</sup> |
| Capacity              | 2 118                |
| Employees - full time | 430                  |
| Casuals               | 100                  |
| Total annual turnover | R 100 million        |

### FAST FOOD OUTLETS

|                       |              |
|-----------------------|--------------|
| No of outlets         | 11           |
| Employees - full time | 151          |
| Total annual turnover | R 34 million |

### CINEMAS

|                      |                      |
|----------------------|----------------------|
| No of cinemas        | 6                    |
| Size                 | 2 241 m <sup>2</sup> |
| Capacity             | 874                  |
| No of shows          | 1 825                |
| No of tickets sold   | 181 959              |
| Total Revenue        | R 9 million          |
| Employees - direct   | 4                    |
| Employees - indirect | 47                   |

### ENTERTAINMENT AREAS

|                        |                          |
|------------------------|--------------------------|
| No of areas            | 8                        |
| Types of entertainment | Games Arcade, Action Bar |
| Size                   | 27 515 m <sup>2</sup>    |
| Capacity               | 7 108                    |
| No of guests           | 245 495                  |
| Employees - full time  | 42                       |
| Casuals                | 8                        |
| Total annual turnover  | R 29 million             |

### RETAIL OUTLETS

|                       |             |
|-----------------------|-------------|
| No of shops           | 5           |
| Employees - full time | 18          |
| Casuals               | 12          |
| Total annual turnover | R 3 million |

### HOTELS

|                              |              |
|------------------------------|--------------|
| No of hotels                 | 4            |
| Size of hotels               | 236 rooms    |
| No of beds                   | 376          |
| Ave occupancy percentage     | 84%          |
| Percentage foreign occupants | 14%          |
| No of guests                 | 123 534      |
| Employees - direct           | 84           |
| Employees - indirect         | 47           |
| Total annual turnover        | R 24 million |

### CONFERENCE FACILITIES

|                       |                      |
|-----------------------|----------------------|
| Size                  | 2 384 m <sup>2</sup> |
| Capacity              | 1 720                |
| No of conventions     | 309                  |
| No of delegates       | 18 716               |
| Employees - direct    | 40                   |
| Employees - indirect  | 25                   |
| Total annual turnover | R 3 million          |

### SPORTING EVENTS

|                    |                               |
|--------------------|-------------------------------|
| No of events       | 5                             |
| Type of events     | ATV and Mountain Biking, Golf |
| No of participants | 975                           |
| No of spectators   | 1 500                         |
| Facilities used    | Golf Course, Hotel            |

### PROVINCIAL GAMING TAX BASE

| Taxable revenue (millions) |          | Rates of tax |
|----------------------------|----------|--------------|
| 0 - 14,2                   |          | 6.0%         |
| 14,2 - 28,4                | 852 000  | 8.5%         |
| 28,4 - 42,6                | 2.059m + | 11.0%        |
| 42,6 - 56,8                | 3 621m + | 13.0%        |
| 56,8 - 71,0                | 5 467m + | 15.0%        |
| >71,0                      | 7 597m + | 17.0%        |





#### CAPE TOWN: GRANDWEST CASINO AND ENTERTAINMENT WORLD

|                          |                                  |
|--------------------------|----------------------------------|
| Date opened              | December 2000                    |
| Operator                 | SunWest International (Pty) Ltd  |
| Management company       | Sun International Management Ltd |
| Total capital investment | R 1 billion                      |
| Employees                | 1 750                            |
| Permanent                | 1 056                            |
| Casuals                  | 11                               |
| Outsourced               | 683                              |
| Slots                    | 2 524                            |
| Tables                   | 78                               |
| Visitors                 | 6 194 428                        |

#### CALEDON: CALEDON CASINO, HOTEL AND SPA

|                          |               |
|--------------------------|---------------|
| Date opened              | October 2000  |
| Operator                 | Tsogo Sun     |
| Total capital investment | R 175 million |
| Employees                | 401           |
| Permanent                | 171           |
| Casuals                  | 155           |
| Outsourced               | 75            |
| Slots                    | 337           |
| Tables                   | 8             |
| Visitors                 | 223 086       |

#### LANGEBAAN: MYKONOS CASINO

|                          |               |
|--------------------------|---------------|
| Date opened              | November 2000 |
| Operator                 | Tsogo Sun     |
| Total capital investment | R 74 million  |
| Employees                | 268           |
| Permanent                | 177           |
| Outsourced               | 91            |
| Slots                    | 320           |
| Tables                   | 6             |
| Visitors                 | 749 226       |

#### MOSSSEL BAY: GARDEN ROUTE CASINO

|                          |               |
|--------------------------|---------------|
| Date opened              | December 2002 |
| Operator                 | Tsogo Sun     |
| Total capital investment | R 183 million |
| Employees                | 340           |
| Permanent                | 213           |
| Outsourced               | 127           |
| Slots                    | 412           |
| Tables                   | 16            |
| Visitors                 | 351 015       |

#### WORCESTER: GOLDEN VALLEY CASINO

|                          |                                  |
|--------------------------|----------------------------------|
| Date opened              | November 2006                    |
| Operator                 | Worcester Casino (Pty) Ltd       |
| Management company       | Sun International Management Ltd |
| Total capital investment | R 211 million                    |
| Employees                | 408                              |
| Permanent                | 155                              |
| Outsourced               | 253                              |
| Slots                    | 220                              |
| Tables                   | 6                                |
| Visitors                 | 426 197                          |





## Casino Company Profiles



### TSOGO SUN

Tsogo Sun is the largest hotels, gaming and entertainment company in South Africa, providing a vast variety of hospitality and exciting entertainment and leisure experiences. Combining an established heritage with a professional and energised approach, the group proudly encompasses 14 casinos and over 90 hotels in South Africa, Africa and the Seychelles.

The company's urban and resort casino portfolio includes the most popular entertainment destinations, strategically located in six provinces throughout South Africa, as follows: **Gauteng** (three properties) – Montecasino, Gold Reef City Casino and Silverstar Casino; **Kwazulu/Natal** (three properties) – Suncoast Casino and Entertainment World, Golden Horse Casino and Blackrock Casino; **Mpumalanga** (two properties) – Emnotweni Casino and The Ridge Casino; **Free State** (one property) – Goldfields Casino; **Eastern Cape** (two properties) – Hemingways Casino and Queens Casino; **Western Cape** (three properties) – The Caledon Casino, Hotel and Spa, Mykonos Casino and Garden Route Casino.

Tsogo Sun's hospitality interests offer the widest distribution of hotels in Africa, providing world-class accommodation across all markets, including elegant, individually branded Deluxe Hotels and well known trusted market leaders in the premier through budget segments, including Southern Sun, Garden Court, SunSquare, StayEasy and Formula 1 hotels.

The Group's portfolio also includes theatres, including the award-winning Teatro at Montecasino; cinemas; restaurants and bars; tourist and leisure attractions such as the Montecasino Bird Gardens, the Apartheid Museum; as well as over 250 conference and banqueting facilities, including the internationally and locally renowned Sandton Convention Centre.

Tsogo Sun is committed to being at the forefront of world class standards in South African casinos. Furthermore Tsogo Sun is passionate about empowerment and social responsibility, with a core ethos of being a catalyst for change. Based on independent research by the CRF Institute, Tsogo Sun has been certified as a Best Employer for several consecutive years for its outstanding HR policies and

working conditions, excellent reputation, impressive training and development opportunities and highly engaged workforce.

Tsogo Sun is listed on the Johannesburg Stock Exchange. The key shareholders of Tsogo Sun are Hosken Consolidated Investments Limited ("HCI"), a JSE listed investment holding company (41.3%), and SABMiller PLC ("SABM"), the London listed brewing company (39.7%). The remaining shareholding is held by various financial institutions and the general public (19%).

### PEERMONT GROUP

PeerMont Hotels, Casinos and Resorts is one of southern Africa's most empowered hospitality and gaming groups. With a total of 14 properties, nine in South Africa, and five in Botswana, collectively offering over 3 200 slot machines, 140 gaming tables and 1 600 hotel rooms. The conveniently located destinations cater for every taste and style with entertainment, dining, family fun, conferences and events, a host of outdoor adventure activities and gaming. The Group prides itself on strong entrepreneurial management and corporate values with exceptional service, unparalleled products and incredible attention to detail.

Emperors Palace Hotel Casino Convention Resort, Johannesburg; Graceland Hotel, Casino and Country Club, Secunda; Mondazur Hotel and Spa at San Lameer, KwaZulu-Natal; Frontier Inn and Casino, Bethlehem; Umfolozi Hotel Casino Convention Resort, Empangeni; Rio Hotel Casino and Convention Resort, Klerksdorp; Khoroni Hotel Casino Convention Resort, Thohoyandou; Taung Hotel Convention Resort, Taung and Mmabatho Palms Hotel Casino Convention Resort in Mafikeng. In Botswana, PeerMont owns and manages The Grand Palm Hotel Casino Convention Resort and the Mondior hotel in Gaborone; the Metcourt hotel as well as the Sedibeng Casino in Francistown and Syringa Casino in Selebi Phikwe.

### SUN INTERNATIONAL

Sun International was established in 1983 and listed on the Johannesburg Stock Exchange in 1985. The group operates 22 casinos in southern Africa, including 13 of the 37 casino licences issued in South Africa.



Sun International owns and operates internationally acclaimed tourism resorts, luxury hotels and urban entertainment operations in 15 regulated jurisdictions in eight countries, including South Africa, Zambia, Nigeria, Botswana, Namibia, Lesotho, Swaziland and Chile. More than half of this portfolio has been developed in the last ten years, with new projects having been launched in West Africa and South America.

Every day, over 50 000 customers from over 50 countries visit a Sun International property, accounting for 725 000 room nights sold in 2011, 163 000 of them to international tourists.

Over a period of three decades, the group has invested more than R14 billion in new tourism infrastructure. It employs just under 11 000 people on a permanent basis, 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 is the leading casino operator in the southern hemisphere and enjoys a 42.2% share of the South African casino market. In Chile, Monticello's share of the non-municipal casino market stands at 28.9%.

#### LONDON CLUBS INTERNATIONAL

London Clubs International has been part of Caesars Entertainment Corporation since 2006, and is one of Europe's leading casino companies, offering a diverse portfolio of 14 entertainment and gaming locations throughout the United Kingdom, South Africa and Egypt.

Caesars Entertainment saw its beginning in Reno, Nevada more than 70 years ago. Since then the company has grown through the development of new resorts, expansions and acquisitions, and now owns or manages casino resorts on four continents with more than 70 000 employees.

Emerald Resort and Casino, managed by London Clubs, opened in 1998 and resides on the lush banks of the Vaal River, less than an hour from O.R. Tambo International Airport. To date Emerald Resort and Casino has over 1000 employees, more than 600 slot machines and over 30 tables. Emerald Resort and Casino prides itself on service, the highest standards of customer care and commitment to the environment and the local community.





## Corporate Social Investment



### TSOGO SUN GAMING

#### Overview of Corporate Social Investment activities

Tsogo Sun has a commitment to leverage its resources, experience and geographical footprint within the Gaming, Hospitality and Entertainment Industry to provide the platform for initiatives that achieve lasting results.

To lead social projects that create lasting change in South Africa Tsogo Sun has launched the SUNcares initiative. SUNcares is a catalyst for change through sport, performing arts, hospitality training and consideration for the environment.

SUNcares creates meaningful social change in communities through the following carefully designed Academies and Programs:

#### SUNcares Sports Academy

The SUNcares Sports Academy is active in ensuring that school going children in rural areas surrounding Tsogo Sun's casinos are given the opportunity to participate in extracurricular sports whilst at the same time being educated in various life skills programs. The Sports program fits the mandate issued by the Minister of Sport to introduce sports back into the schooling curriculum.

Tsogo Sun has partnered with the Department of Education, SAFA, Lions Rugby Club, Dolphins Cricket, Club Newlands, local business and communities to create the SUNcares Sports Academy.

To date the SUNcares Sports Academy has over 1 300 children enrolled in Soccer, Rugby and Swimming programs. During 2012 approximately 300 more children from rural schools are anticipated to be signed up to cricket programs.

#### SUNcares Performing Arts Academy

Tsogo Sun has been pivotal to the revival of Theatrical Arts in South Africa through its over R250 million investment in theatre infrastructure at Montecasino and Gold Reef City. To support this revival the SUNcares Performing Arts Academy was created to provide school going children in rural schools with extracurricular activities that encourage and promote the performing arts. Disciplines taught include theatre, drama, singing, music, poetry, creative arts and literature.

Through the investments made in bringing theatrical productions to South African shores Tsogo Sun has contributed to job creation in the Performing Arts industry, by dictating the use of South African casts in shows rather than touring overseas casts. During the production of Dreamgirls in 2011, Tsogo Sun was able to ensure that an all black all South African cast was seen on stage, most of which have gone on to tour with the production overseas.

Currently 120 learners participate in the SUNcares Performing Arts Academy, with a further 120 earmarked for 2012.

#### SUNcares Environmental Program

Through its SUNcares Environmental Program, Tsogo Sun ensures that it champions the well-being of our planet and communities. The program is partnered with the Heritage Group and Green Globe to introduce property specific environmental management systems. Tsogo Sun has achieved measurable results with regards to water reduction, reduction in energy consumption, improved waste recycling and community greening and sustainability projects. In the last 2 years it has reduced its energy consumption by 11.3%.

As the largest Gaming, Hotel and Entertainment company in South Africa, Tsogo Sun is proud to commit its resources, experience and network to creating social change in South Africa, by using Sports and the Performing Arts as the medium to transform the lives of school-going children in rural towns.



## PROVINCIAL CSI

### GAUTENG

#### Montecasino

| Project / Beneficiary                           | Amount           | Description   |
|---|------------------|---|
| Montecasino Bird Garden                         | 3 000 000        | The facility serves as a tourist attraction and a wildlife education venue, particularly for schools, and also acts a sanctuary for conservation purposes.                          |
| Ikhambi Clinic and Outdoor Medical Clinic       | 2 277 603        | Clinic services and facilities.   |
| Recycling Solutions and Energy saving programme | 1 614 739        | Environmentally-conscious waste disposal management and energy saving light bulb programme  |
| Performing Arts                                 | 457 001          | The Performing Arts programme includes all disciplines including, but not limited to theatre, drama, singing, musical instruments, poetry, creative arts, literature and much more. |
| SA GuideDogs                                    | 208 465          | Trains dogs to enhance the mobility, independence and dignity of blind and partially sighted people.  |
| Sports Development                              | 152 445          | Rugby development at schools in local communities during life orientation and as an after school activity.  |
| JAG Sports and Education Trust                  | 70 458           | Foundation that provides coaching of various sports to underprivileged young people.  |
| Other CSI                                       | 529 702          |   |
| National Responsible Gambling                   | 1 174 513        | Organisation which helps persons with gambling problems.  |
| <b>TOTAL</b>                                    | <b>8 960 124</b> |   |

#### Gold Reef City Casino and Theme Park

| Project / Beneficiary                           | Amount            | Description   |
|---|-------------------|---|
| South African Apartheid Museum Freedom Park     | 9 313 173         | Continuation of funding for the Apartheid Museum at Freedom Park  |
| SA Apartheid Museum – school visiting programme | 30 836            | Weekly school visiting programme with Grade 9 learners from schools in Soweto to provide them the opportunity of experience the SA Apartheid Museum.              |
| Feed SA   | 20 000.00         | Feeding scheme and crèche development in Soweto   |
| Watoto Choir                                    | 32 307            | Visiting international singing group promoting awareness of HIV/Aids. Including a performance at Gold Reef City Theme Park along with local Soweto school choirs. |
| Other CSI                                       | 319 313           |   |
| National Responsible Gambling                   | 1 478 676         | Organisation which helps persons with gambling problems.  |
| <b>TOTAL</b>                                    | <b>11 194 305</b> |   |

#### Silverstar Casino

| Project / Beneficiary              | Amount           | Description  |
|------------------------------------|------------------|--|
| Soccer programme                   | 1 952 043        | Soccer academy for all schools in the disadvantaged communities on the West Rand. Includes soccer kit, equipment, training, school league and coaches. |
| Maths project – Lodirile Secondary | 352 105          | Providing computers and facilitators for extra maths lessons for Grade 11 and 12 learners  |
| MaAfrica Tikkun                    | 627 550          | Development of multipurpose youth development centre in Orange Farm.   |
| Feed SA                            | 565 754          | Feeding scheme and crèche development in Soweto  |
| Mogale City Community              | 1 892 447        | Erecting of poles with luminaire for safety as well as providing crash barriers on the roads outside of the casino premises.                           |
| Leratong Hospital                  | 1 540 328        | Upgrade of emergency ward and trauma facilities at Leratong Hospital in West Rand.   |
| Youth Journalism Programme         | 334 527          | Skills development in the field of journalism for unemployed youth in the community of Swaneville on the West Rand.                                    |
| Other CSI                          | 301 284          |  |
| National Responsible Gambling      | 624 119          | Organisation which helps persons with gambling problems.   |
| <b>TOTAL</b>                       | <b>8 190 157</b> |  |



## KWAZULU-NATAL

### SunCoast Casino and Entertainment World

| Project / Beneficiary         | Amount    | Description   |
|-------------------------------|-----------|---|
| Clinic and services           | 2 900 000 | Clinic services and facilities.   |
| Jacob Zuma Trust              | 1 000 000 | Trust   |
| Vukukhanye                    | 154 105   | Annually SUNCOAST contributes to infrastructure development or renovations as required in Chesterville.   |
| Duke of Edinburgh             | 307 088   | A prestigious national amateur golf tournament held under the Tsogo Sun Gaming banner, the Tournament is hailed for its financial contribution towards the communities as echoed by the His Royal Highness, Prince Edward. He established the Duke of Edinburgh Cup Golf Tournament to raise money for International Golf for Youth Limited, which supports youth projects internationally. |
| Other CSI                     |           |   |
| National Responsible Gambling | 879 955   | Organisation which helps persons with gambling problems.  |
| <b>TOTAL</b>                  |           |   |

### Golden Horse

| Project / Beneficiary         | Amount           | Description   |
|-------------------------------|------------------|---|
| Olwazini Science Centre       | 1 044 106        | A science centre that offers its facilities for free of charge to schools and the community as an educational and entertainment resource. |
| Super Hero's Christmas Party  | 39 423           | Annual party held together with local NGOs and victim support groups to celebrate Christmas with underprivileged children.                |
| Other CSI                     | 35 916           |   |
| National Responsible Gambling | 345 042          | Organisation which helps persons with gambling problems.  |
| <b>TOTAL</b>                  | <b>1 464 487</b> |   |

### Black Rock

| Project / Beneficiary              | Amount         | Description  |
|------------------------------------|----------------|--|
| New Castle community radio station | 119 556        | Community radio station that broadcasts from the casino premises   |
| Clinic services                    | 174 360        | Clinic services and facilities.  |
| SA Feeding Project                 | 25 000         | A project that feeds under privileged kids from the community who go to school but do not get a full meal at home. |
| St Anthony's Home                  | 29 212         | Orphanage and crèche that provides for homeless children from the community.                                       |
| Other CSI                          | 31 556         |  |
| National Responsible Gambling      | 126 324        | Organisation which helps persons with gambling problems.   |
| <b>TOTAL</b>                       | <b>506 008</b> |  |

## WESTERN CAPE

### Mykonos

| Project / Beneficiary         | Amount           | Description  |
|-------------------------------|------------------|--|
| West Coast Community Trust    | 2 471 569        | 5% of pre-tax profits are donated to the trust that was established primarily to provide educational assistance to the local community. The trustees are responsible for identifying and distributing these funds. |
| Other CSI                     | 647 909          |  |
| National Responsible Gambling | 216 975          | Organisation which helps persons with gambling problems.   |
| <b>TOTAL</b>                  | <b>3 336 453</b> |  |



## Caledon Spa and Casino

| Project / Beneficiary         | Amount         | Description  |
|-------------------------------|----------------|--|
| Caledon Community Trusts      | 576 005        | The trust contributes to the development of the local community through contributions to school feeding schemes, educational facilities, skills development and entrepreneurs as well as school and tertiary education bursaries.  |
| Ashwin January                | 60 000         | Ashwin Willemse is a 13 year old learner from Paarl Gym Primary who has been identified by WP Rugby as a "gem in the making". He comes out of a disadvantaged background and received a one year scholarship at Paarl Gym Primary in 2011 after the school saw his rugby potential. During his year at the school, his grades have improved drastically and he has received rugby coaching for the first time in his life. Through the money raised at The Caledon Casino, Hotel and Spa golf event, the scholar's place at the school, and the development of his rugby talent, has been secured for 2012 and 2013. |
| Child Welfare                 | 10 000         | Our Annual Duke of Edinburgh Golf Tournament was hosted at Arabella on Monday, 9th May. An amount of R10 000 was raised and donated to ACW Caledon (Child Welfare) who assist with abandoned children.   |
| Other CSI                     | 62 636         |  |
| National Responsible Gambling | 168 973        | Organisation which helps persons with gambling problems.   |
| <b>TOTAL</b>                  | <b>877 614</b> |  |

## Garden Route Casino and Spa

| Project / Beneficiary                       | Amount           | Description   |
|---|------------------|---|
| SPCA  | 260 000          | Building of a new cattery at Mossel Bay SPCA.   |
| Garden Cities Science Lab                   | 200 000          | The building of 2 science labs in schools to increase the educational awareness of science within schools.  |
| Eden and Central Karoo Education District   | 98 682           | The Handle programme is to empower educators with specific skills that will assist them in establishing a foundation on which the basic skills of literacy and numeracy can be built. This includes the principals and two educators per school of all primary schools in the Greater Mossel Bay Area. Four Pilot schools will then be targeted for the implementation of the handle program with learners in grades R - 2. |
| Isilathiso Primary School                   | 100 000          | Erection of fences and ablution facilities at Isilathiso Primary. This will allow for greater public use of the sports facilities together with local municipality.   |
| St Blaize Trail                             | 220 000          | For the alien eradication on the St Blaize trail as well as the placement of signage.   |
| Dept of Education Maths and Science project | 72 400           | To put 392 Grade 6 learners through extra lessons for mathematics   |
| Hillcrest Primary                           | 150 000          | For the completion of the construction of change-room facilities.   |
| Piet Julies Aids Action Fund                | 87 846           | School uniforms for 150 HIV affected school children in Mossel Bay  |
| Other CSI                                   | 285 781          |   |
| National Responsible Gambling               | 274 029          | Organisation which helps persons with gambling problems.  |
| <b>TOTAL</b>                                | <b>1 748 738</b> |   |

## FREE STATE

### Goldfields Casino

| Project / Beneficiary         | Amount         | Description  |
|-------------------------------|----------------|--|
| Edmund Rice School            | 280 061        | Providing bursaries for underprivileged learners         |
| Other CSI                     | 32 126         |  |
| National Responsible Gambling | 75 972         | Organisation which helps persons with gambling problems. |
| <b>TOTAL</b>                  | <b>388 159</b> |  |



## EASTERN CAPE

### Queens Casino

| Project / Beneficiary         | Amount         | Description  |
|-------------------------------|----------------|--|
| Community projects            | 241 028        | Supporting various local community NGOs and schools      |
| National Responsible Gambling | 117 899        | Organisation which helps persons with gambling problems. |
| <b>TOTAL</b>                  | <b>358 927</b> |  |

### Hemingways

| Project / Beneficiary         | Amount           | Description   |
|-------------------------------|------------------|---|
| Community Clinic              | 1 276 768        | Clinic facilities and services for the community.   |
| Nojubaalaza Swimming Project  | 175 000          | School swimming initiative in Mdantsane to revive swimming in the community and reduce drowning statistics. |
| Other CSI                     | 49 727           |   |
| National Responsible Gambling | 201 494          | Organisation which helps persons with gambling problems.  |
| <b>TOTAL</b>                  | <b>1 702 989</b> |   |

## MPUMULANGA

### Emnotweni Casino

| Project / Beneficiary         | Amount         | Description   |
|-------------------------------|----------------|---|
| Phatfwa School                | 23 272         | Emnotweni has embarked on a journey to empower a number of orphans at the White River Phatfwa Secondary School. This includes school fees and uniforms, tutorial fees as well as computers, stationery and learning materials required.         |
| School and tutor fees         | 300 000        | As an extension of the commitment to Phatfwa Secondary School is a learnership programme for Grade 12 students that wish to study further. Emnotweni provides guidance and assistance on further studies including tutorials for extra lessons. |
| Clinic                        | 189 833        | Community clinic and facilities   |
| SOS Children's Village        | 82 785         | SOS Children's Villages build families for orphaned and abandoned children. Eight to ten children are cared for in small family-type homes, the SOS families, and are raised like brothers and sisters.   |
| Other CSI                     | 32 110         |   |
| National Responsible Gambling | 185 064        | Organisation which helps persons with gambling problems.  |
| <b>TOTAL</b>                  | <b>818 512</b> |   |

### The Ridge Casino

| Project / Beneficiary         | Amount         | Description  |
|-------------------------------|----------------|--|
| Middelburg Care Village       | 104 305        | Making the lives of young and old a little better. Ongoing monthly assistance in the form of school stationery, personal hygiene products, scholarships, medication, birthday gifts and grocery items. |
| Clinic                        | 154 542        | Community clinic resources and facilities  |
| SPCA and animal care          | 49 065         |  |
| White Rose Hospice            | 20 781         |  |
| Other CSI                     | 159 970        | Smaller contributions made to a variety of charitable organisations.   |
| National Responsible Gambling | 230 518        | Organisation which helps persons with gambling problems.   |
| <b>TOTAL</b>                  | <b>719 181</b> |  |





## PEERMONT GROUP

The Peermont Hotels, Casinos and Resorts purpose is to conduct business profitably, whilst fulfilling its obligation to improve the well-being of the communities in which each of its properties operate.

Since inception, Peermont has committed itself to making a significant contribution towards Broad-Based Black Economic Empowerment (B-BBEE) and sustainable community development. This is achieved by the continual provision of financial assistance, skills training and leadership support through the various Peermont Trusts and other Corporate Social Investment and Responsibility initiatives. The Group supports a range of projects falling within the four pillars of its Corporate Social Investment strategy.

The four pillars of its CSI strategy are:

- Education
- Youth Development
- Entrepreneurial Enrichment
- Environmental Enrichment

Total CSI spend by Peermont Trusts and CSI Funds amounted to R32.8 million, of which:

- R12.7 million was funded by donations from Peermont;
- R6.7 million was generated from investment income; and
- R13.4 million was funded from capital provided through previous Peermont donations and dividends.

A summary of Peermont's CSI initiatives:

### 1. Peermont Education Trust (PET)

The PET offers full scholarships (covering the cost of tuition, books, mentorship, accommodation and living expenses) to deserving young people from underprivileged backgrounds, who have demonstrated potential and ability to succeed in their chosen fields of study. From 36 students sponsored by the Trust in 2010, twenty passed, three failed and thirteen will graduate. This demonstrates the level of commitment from our students, achieving a superb 86% pass rate compared to the national average of 22%. This is due to the constant mentoring and coaching the students receive, which enables them to cope effectively with the rigours of tertiary education.

The trustees awarded eleven new scholarships for the 2011 academic year (at a cost of R76 400 each) bringing the total number of students to 30.

To date, the PET has financially supported a total of 83 university graduates in fields such as commerce, actuarial science, economics, mechatronics, physics, genetics and medicine.

In addition, the PET has sponsored over 450 learners under the Lesedi Industrial Skills Programme, empowering them to become electricians, motor mechanics, nurses, chefs and other career choices within the hospitality sector. In 2011, the PET awarded 11 university scholarships and 75 learnerships under the programme. In May 2012, 39 students who completed skills courses and trades through the Lesedi programme received their graduation certificates at a ceremony held at Emperors Palace.



## Corporate Social Investment (continued)



### 2. Peermont Childrens Trust (PCT)

The purpose of the PCT is to provide social, educational and emotional upliftment to children in disadvantaged areas where the group operates.

To date, the PCT has refurbished two nursery schools for disadvantaged children; erected 40 jungle gyms for learners; established nine afterschool centres; created 140 media centres; sponsored learners under The Star Schools project; donated maths and science textbooks and equipment; sponsored sports coaching clinics for educators; purchased uniforms for underprivileged learners; funded special programmes for disabled learners and sponsored career-guidance workshops for 30 schools in Ekurhuleni.

The PCT invited approximately 120 grade 12 learners from various schools in Ekurhuleni to a Career Day Expo at Pinegrove Primary School in Springs during March 2012. The event was part of the Trust's matric improvement programme and its continued sponsorship of learners from schools in Daveyton, Duduza, KwaThema, Vosloorus, Bakerton and Wattville to attend Star Schools centres in Springs and Vosloorus. Apart from getting the chance to find out more about courses offered by tertiary organizations such as Damelin College, Midrand Graduate Institute, Oakfields College, Capsicum Culinary Studio and the Universities of Johannesburg and the Witwatersrand, they also received details on how to register at these institutions. Thanks to the Trust the learners that attended the Career Day receive additional tuition on Saturdays and during school holidays at Star School centres with the aim of improving their school grades, which will ultimately empower them to follow their dreams, uplift their lives and be role models in their communities.

In September 2011, the Gauteng Department of Education (GDE), in partnership with the PCT and PACE Careers, celebrated National Career Dress-up Day with a special presentation and awards event for learners from 30 Ekurhuleni schools at Victor

Ndlazilwana Hall in Daveyton. 300 youngsters from primary schools including Fortune Kunene, Thembakazi, Siphile, Tamaho, Raehile and Jongimfundo participated in the event with 30 learners also getting the opportunity to present their chosen career speeches on the day.

Over 500 aspiring young sports stars from several primary schools in Ekurhuleni participated in the inaugural PCT Primary Schools Sports Tournament at the Sam Ntuli Sports Centre in Thokoza, sponsored by the PCT.

Three students of the Athena Tourism School in Lausanne, Switzerland who were gaining workplace experience at Emperors Palace as part of an exchange programme between the Peermont hotel group, the Swiss school and Tswelopele Hospitality Academy, paid a visit to Nageng Primary After-Care Centre in Vosloorus. Apart from treating the children to sweets and muffins, the Swiss youngsters also assisted the centre's coordinators to serve lunch to the learners. The Nageng Primary centre is one of nine centres situated in Ekurhuleni that are supported by the PCT and gives afternoon meals and after school care to less fortunate learners from 22 schools.

### 3. Peermont School Support Programme (PSSP)

The PSSP project is a five-year, R40 million commitment to support the establishment of the "centres of excellence" in carefully selected high schools within the Ekurhuleni and Sedibeng municipality catchment areas. Special focus is placed on the fields of Mathematics, Science, English and Technology. These centres are determined to deliver quality matric results on a sustained basis and produced high school graduates that can excel in tertiary learning, or pursue working careers in the services industry, or be prepared for a life of entrepreneurship.

The ethos of the programme is one of collaboration and sharing best practice based on a model of continuous learning.





The seven supported high schools are:

- General Smuts High School – Vereeniging
- Germiston High School – Germiston
- Lethulwazi Secondary School – Vosloorus
- Sunward Park High School – Boksburg
- Tembisa Secondary School – Tembisa
- Thuto-Lesedi Secondary School – Vosloorus
- Unity Secondary School – Daveyton

The programme has been endorsed by authorities of the GDE (Gauteng Department of Education) and the GGB (Gauteng Gambling Board).

Under the PSSP programme, the company established Computer Laboratories at each of the high schools to specifically offer remedial-type teaching (i.e. language comprehension and mathematics) to address the challenges and help bridge the gap posed by primary school learners entering secondary schools ill-prepared and under equipped. The project will also cover the costs towards insurance, ADSL rental, security and armed response.

As an extension of the PSSP programme, 19 primary schools that serve as feeder schools to Peermont's partner schools were included into the programme, giving them a grant of R700 000 each.

The PSSP allocated its funds towards interventions that support systemic change in three core areas:

- I. Leadership and management
- II. In the classroom
- III. Extra-curricular activities

The aim is to build effective leadership in the schools, secure alignment among all stakeholders, and encourage positive behaviour change towards education, thus assisting to create a permanent and systematic change in the schools. The programme will touch the lives of about 30,000 learners over the five-year period.

#### IPAD Learning Programme Roll-Out

The PSSP is investing over R8.5 million in technology related solutions for the 26 supported schools. PSSP has entered into a joint venture with iSchoolAfrica to provide and support the creation of an innovative iPad 1 and iPad 2 learning environment in the Peermont supported schools. To date, a total of 700 iPads have been distributed to all the schools, including the feeder primary schools and continuous training and support is being given to ensure integration of teaching and learning.

Energy, passion and talent – the perfect mix to showcase excellence at the 2012 Peermont Performing Arts Festival held



## Corporate Social Investment (continued)



at Emperors Palace in May 2012. Close to 800 learners and educators gathered as part of the annual event that recognises the wealth of talent within the seven high schools that form part of the PSSP. The aim of supporting excellence in the performing arts was achieved as each school performed with contagious passion and energy.

The third Peermont Public Speaking Competition took place at the Constitutional Court in March as part of the PSSP's Human Rights campaign which creates awareness of rights and responsibilities and the Constitution among learners in the supported schools and links this to effective communication and excellence. Each of the seven supported schools hosted internal competitions to select a junior and senior champion to represent them at the final event, produced Human Rights posters and their press teams documented the process.

Three learners selected from the schools supported by the Peermont Group were given a lifetime opportunity to attend the 2012 World Leadership Conference in Atlanta, Georgia in the USA during June, hosted by the accomplished multi Grammy-award winner singer and songwriter, founder and leader of the New Look Foundation, Usher.

### 4. Community Development and Infrastructure Funds

These funds have significantly impacted on the lives of the less-served communities through the following projects.

#### 4.1. Public Infrastructure:

Projects undertaken include the upgrading of walkways in Tembisa, upgrading of the so-called "death bend" at the O.R. Tambo International airport / R21 interchange, the upgrading of Jones Road and the Griffiths off-ramp and the upgrading of the K157 / P157 interchange as well as the Olifant fire station

#### 4.2 East Rand Business Precinct:

- This project is to prevent crime in Jet Park and surrounding areas.
- Peermont has supplied and maintain two armed response vehicles that patrol the area.

- Peermont has repaired broken street lights, potholes, etc. in the East Rand Business Precinct.

#### 4.3 Winnie Mandela Informal Settlement crime prevention programme in Tembisa:

A community upliftment project to reduce crime in the area.

- Two police vehicles were sponsored and are fully maintained by the company.

### 5. The Ekurhuleni Peermont Chambers of Commerce Trust (EPCoCT)

The objective of the EPCoCT is to provide small to medium businesses from the Ekurhuleni Metropolitan Municipality (EMM) with the necessary financial and material support they require to ensure that they achieve sustainable success. Since distributing its first funds in 2008, EPCoCT has contributed nearly R15 million to 35 community-based projects as a means to uplift and empower the people of Ekurhuleni. Testimony to the Trust's commitment to making a significant contribution towards sustainable community development in the region, is its approval of 16 grants to the value of R7,5 million.

#### EMM-EPCoCT Business Facilitation Network Project

This multi-million rand project is a joint venture between the EMM and EPCoCT towards the establishment of a one-stop business centre to provide walk-in support and training to members of the small business community and entrepreneurs who are previously disadvantaged inhabitants of the EMM. The centre will be located at the City House Building in Kempton Park and should be operational in the third quarter of 2012.

#### 5.1 A brief description of projects supported:

- African Olive Trading: specialises in professional consulting, commissioning and maintenance services in the discipline of electrical engineering. Funding went towards the training of seven technicians to attend an electrical technicians training programme.  
Grant R417 000





- ii. Boikano Accountants Inc.: provides financial management, tax planning and corporate compliance services to private and public companies, including government and NGOs. Funding went towards a training programme to up-skill disadvantaged black accounting graduates to qualify as accounting officers.  
Grant R287 949
- iii. Conducive Business Enterprises: specialises in the processing and packaging of vegetables, which is then sold to clients such as hospitals, institutional homes, caterers and canteens. The grant went towards the purchase of vegetable processing equipment; refrigerated vehicle and office furniture as part of an expansion strategy.  
Grant R290 218
- iv. Vermi Trade: specialises in vermicomposting trade operations, which involves the breeding of earthworms, production and sale of various vermiculture products. Funding towards the establishment of a production plant and purchase of earthworms and equipment.  
Grant: R451 200
- v. Khuphukani Bakery and Confectionery: supplies baked products to the greater community of Daveyton and surrounding areas. Funding went towards the construction of a bakery building in Daveyton, unveiled in October 2011.  
Grant: R328 328
- vi. Greenville Laundry: services the laundry and dry cleaning market in the south of Benoni's CBD in Ekurhuleni. The company offers coin-operated self-service and in-house laundry services to private and business clients. Funding went towards the procurement of new laundry equipment and working capital as part of the expansion.  
Grant: R212 669
- vii. Buda Farming Enterprise, is situated just outside Petit and is owned and run by husband and wife team, Patrick and Sara Buda. Specializing in vegetable farming on a 222 hectare government leased farm, they have been producing a wide variety of vegetables since 2009. In 2011, Buda approached the EPCoCT for assistance and the Trust approved a grant of R333 000. This funding has subsequently been used to purchase and install an irrigation system, purchase a delivery truck, a farm tractor, pesticides and fertilizers and they are also currently in the process of installing a cold room for produce storage purposes.  
Grant: R330 000
- viii. Naledi Bakeries was given a grant for R450 000 with which they bought and installed new equipment like a rotary rack electric oven, spiral dough mixer, mini dough moulder and a dough divider which now enables them to produce up to 2 500 loaves of bread a day.  
Grant: R450 000



## Corporate Social Investment (continued)



### North West (NW) Hotel Casino Convention Resorts

In 2011, the Rio Hotel Casino and Convention Resort paid over R400 000 which assisted 20 students ranging from first year to final year candidates across a broad spectrum of degree courses. Since the beginning of 2010, Rio has given a total of R2 million to the North-West University.

Rio Hotel Casino and Convention Resort contributed R200 000 to the Institute of Hotel Management in Mmabatho to fund bursaries for four deserving students studying Hospitality Management and Professional Cookery courses.

### 6. KwaZulu-Natal (KZN)

#### Umfolozi Hotel Casino Convention Resort and Mondazur Resort

Situated on the outskirts of Empangeni, the Thuthukani Special School caters for educational needs of 300 mentally handicapped learners aged 6 to 18 years. The main focus of the programme is to ensure that the learners leave school as independent as possible; equipping them with the skills they need to play a contributing role in society as adults. Thuthukani offers meals to the students on a daily basis and the Umfolozi Resort contributes to the costs of the scheme on a monthly basis.

Umfolozi Hotel Casino Convention Resort supports Beverly and her orphanage which is situated in the Empangeni area. The resort contributes R1 000 every month towards the grocery spend and also contributed a once off amount of R20 000 to cover the children's school fees.

Umfolozi continues to support the Hope Project which focuses on providing food and medical care to AIDS orphans to the tune of R3000 per month. The project was also adopted as a CSI Employee Involvement project for a month and during that time the following tasks were performed: a clean-up of the entire project with voluntary assistance from Nomandla Cleaning;

painting of the interior of the building; the installation of shelving; and, the laundering of donated clothing. 17 staff members donated 96 hours to this project.

Umfolozi supported the Mandela Day Initiative at Sandiswa Care Centre and Crèche to the value of R3 000 and included the team from Umfolozi handing out blankets, scarves and hats, as well as treating residents to hot soup.

Umfolozi provided the Zululand Crafters Association with a R13 500 donation to ensure its continued promotion of the interests of crafters in the Zululand region, especially in regards to the upliftment and promotion of small businesses in the area.

### 7. Graceland Hotel, Casino and Country Club

The Southern Highveld Community Development Trust, Graceland's Corporate Social Responsibility Trust vehicle is assisting four students with scholarships (including textbooks, tuition and accommodation) in fields such as aeronautical engineering, chemistry, dentistry and medicine. One such student, Michael Mahlangu graduated with a B.Sc. Aeronautical Engineering from the University of the Witwatersrand.

### 8. Frontier Inn and Casino

The Frontier Inn Dihlabeng Community Trust settled the outstanding bursary cost for students from the Dihlabeng area for 2011 amounting to more than R37 000.

The Trust also provided a state-of-the-art Mobile Policing Unit valued at R74 000 to the SAPS in Bethlehem. The unit has an office with desks and shelves as well as a waiting area and the sides of the unit fold out to allow easy public access. Power outlets and lighting capabilities have also been included. The unit will be used at community gatherings and special events as well as being able to be placed in high crime areas to allow for visible policing activities.





The Frontier Inn Dihlabeng Community Trust donated equipment and building materials to the value of R20 000 to the Ithuseng Centre for the Disabled in Clarens. The centre is now furnished with a new geyser, ceiling boards, carpet and tiles and a fresh coat of paint.

Frontier Inn and Casino recently celebrated a successful one year partnership with the Dirty Down Car Wash and Services CC which has handles not only car washing in the last year but has also become involved in the maintenance of the gardens at the resort. Outside contracts have also been secured to allow the fledgling business to grow.

#### 9. Khoroni Hotel Casino Convention Resort

The Khoroni Community Education Trust continues to provide bursaries to deserving candidates from disadvantaged backgrounds in the surrounding areas. The Trust contributed about R56 000 towards the bursary programme to enable students to pursue studies in their chosen fields of study. The Resort also made a donation of R2 000 towards the procurement of internet kit for a local school to improve the level of teaching and learning.

On the sport development front, the Resort sponsored a local disabled Olympian athlete Rofiwa Manwato with an amount of R4 070 to assist with his training programme to improve his general fitness and competitiveness.

Other projects included the hosting of a Christmas party and handout of gift bags to orphaned children under the auspices

of the Child Welfare of South Africa and the procurement of wheel chairs for a local old-age home for the disabled. The Resort also supports a local B-BBEE businessman to run a cab service for hotel guests.

#### CSI Projects – Actual CSI Spend:

January to December 2011

#### 2011 CSI Actual Spend By Peermont Trusts and Initiatives (South African units)

|                                     |                   |
|-------------------------------------|-------------------|
| Peermont Education Trust (PET)      | 6 208 438         |
| Peermont Children's Trust (PCT)     | 7 070 314         |
| East Rand Chamber of Commerce Trust | 3 992 315         |
| Community Development Fund          | 204 642           |
| Public Infrastructure Fund          | 3 405 244         |
| Peermont School Support Programme   | 7 317 885         |
| Other Emperors Palace projects      | 410 456           |
| Umfolozi CSIR projects              | 233 539           |
| Graceland CSIR Projects             | 157 329           |
| SHCDT – Graceland                   | 319 254           |
| Khoroni CSIR Projects               | 24 568            |
| Khoroni CET                         | 66 000            |
| Frontier – CSIR projects            | 84 877            |
| FIDCT – Frontier                    | 452 217           |
| Rio CSIR Projects                   | 2 747 481         |
| Mmabatho CSIR Projects              | 141 047           |
| Mondazur CSIR Projects              | 9 617             |
| Head Office CSIR Projects           | 54 725            |
| <b>Total</b>                        | <b>32 899 908</b> |



## Corporate Social Investment (continued)



### Funding of 2011 Actual CSI Spend (SA Units)

*Funded by Peermont Group donations, investment income and capital from previous Peermont donations and dividends*

|  |                   |
|--|-------------------|
| Peermont donations (see breakdown below) | 12 762 753        |
| Investment income                        | 6 731 383         |
| Capital utilized                         | 13 405 772        |
|  | <b>32 899 908</b> |

### 2011 Donations by Peermont Group (SA units)

|                                |                  |
|--------------------------------|------------------|
| Emperors Palace 2011 Donations |                  |
| Peermont Education Trust       | 1 163 224        |
| Peermont Childrens Trust       | 1 163 224        |
| Community Development          | 4 652 897        |
| Public Infrastructure          | 2 326 448        |
| Other projects                 | 410 456          |
|                                | <b>9 716 249</b> |

### Rest of Group 2011 Donations

|   |                   |
|---|-------------------|
| Umfoloji  | 233 539           |
| Graceland   | 157 329           |
| SHCDT – Graceland   | 60 000            |
| Khoroni   | 24 568            |
| Khoroni CET   | 50 000            |
| Frontier  | 84 877            |
| FIDCT – Frontier  | 342 373           |
| Rio   | 1 888 429         |
| Mmabatho  | 141 047           |
| Mondazur  | 9 617             |
| Head Office   | 54 735            |
|   | <b>3 046 504</b>  |
| <b>Total Peermont Group 2011 Donations (South Africa)</b> | <b>12 762 753</b> |

### SUN INTERNATIONAL

As a hotel, resorts and gaming group, Sun International recognises that it has profound implications for local economies through job creation and local economic multipliers. It also recognises that it is uniquely dependent on the goodwill and stability of the communities in which it operates. Sun International focuses on projects that are viable and sustainable in the long term. This means aligning CSI-spend with the group's own business requirements, and focusing on those projects that empower local communities through education, health and welfare, and development via sports, arts and culture.

Sun International is committed to spending 1% of net profit after tax towards black beneficiaries which counts towards Social Economic Development (SED). Over and above the 1% the company also funds projects geared towards CSI.

Sun International's CSI programme is based on the following fundamental principles, some of which are an offshoot of national objectives in pursuit of the country's overall developmental objectives. These are also aligned to the overall strategic business plans to ensure integration to the overall business. The principles are:

- CSI is directed at both national projects run from Sun International's central office and programmes operated by individual business units.
- Central office-level CSI is primarily directed at bodies or causes that are of a national nature or are of interest or significance to the group as a whole.
- Unit level CSI is directed towards local bodies or causes that are of specific interest and significance either locally or regionally.

To ensure that Sun International promotes the upliftment and socio-economic development for the communities in which the group operates the company allocates 1% of net profit after tax in Social Investment and also contributes by working alongside







## Corporate Social Investment (continued)



community members, affording them leadership and transferring skills to ensure success of project undertaken. In the year under review, the group's total Corporate Social Investment spend was R18 446 000.

Based on current South African CSI programmes, the needs of the country (communities), the client base and the areas (geographical) where Sun International operates, the group focuses on the following strategic areas of social investment:

- **Education** – Education is one of the most vital mechanisms for social and economic development in southern Africa. Sun International strives to play a role in education and skills development by using its financial and human resources to transfer skills and expertise to the disadvantaged through various outreach programmes.
- **Health and welfare** – Health is a national priority for various reasons, not least being the massive impact that HIV/Aids is having on our society. Sun International's CSI programme focuses on HIV/Aids and other pressing health problems in the communities in which it operates. The company provides financial aids to schools in the form of bursaries, contributions to various study trusts and improvement of school facilities.

- **Sports, Arts and Culture** – The company is a founding member of the Arts and Culture Trust and we currently have a 5 year contract with them and contribute R100 000 a year. The company is also a major sponsor of the South African Paralympic team.
- **Community Development and Other projects** – Given the nature of Sun International's operations, there are numerous opportunities to promote, support community development.

The table below refers to the CSI spend per category during the period under review.

| CSI SPEND PER CATEGORY       |       |
|------------------------------|-------|
| Focus areas                  |       |
| Community development        | 9.4%  |
| Education                    | 34.1% |
| Health, welfare and HIV/AIDS | 35.4% |
| Other                        | 10.4% |
| Sports, arts and culture     | 10.6% |
| Total                        | 100%  |





# LONDON CLUBS INTERNATIONAL

Corporate Social Development

April 2011 – March 2012

| CHARITIES / BENEFICIARIES      | AMOUNT                | AREA OF FOCUS / PROJECT   |
|--------------------------------|-----------------------|---|
| Lusa Community Chest           | 169 774.26            | Generation @ – Educational programme for children in the Vaal Triangle including basic life skills.<br>Vaal NPO/LUSA Functions<br>Wish upon a Star – 1000 children a day at the Zoo<br>Blanket run – blankets for the police for shack fire victims |
| Deal for Africa                | 367 081.54            | 12 Tons of clothing, sports goods and other items collected in the UK via London Clubs and distributed in the Vaal Triangle Area  |
| CANSA                          | 60 896.76             | CANSA relay for life, CANSA Shavethon and CANSA Breast Walk – honouring cancer survivors and remembering those who lost their fight against cancer.   |
| Sunflower Fund                 | 50 000.00             | Bikers for Bandanas – in aid of the Sunflower Fund – bone marrow donations.   |
| Busy bee hospice               | 36 081.00             | Busy Bee Donation – donated bedding and curtains  |
| One Way Community              | 21 491.00             | Ikageng and Khanya Khaya – fund raising event for two shelters  |
| Rotary Club of Riverside       | 10 000.00             | Rotary donation – food and clothing donations   |
| Winter Warm Project            | 19 939.00             | Provides clothing and shoes for 1000 underprivileged children from shelters.  |
| Bursaries                      | 121 014.14            | Education assistance  |
| Other CSI                      | 26 117.88             |   |
|                                |                       |   |
| Responsible Gambling Programme | 572 870.36            | Organisation which helps persons with gambling problems   |
| <b>TOTAL</b>                   | <b>R 1 455 265.94</b> |   |

## Enterprise Development

April 2011 – March 2012

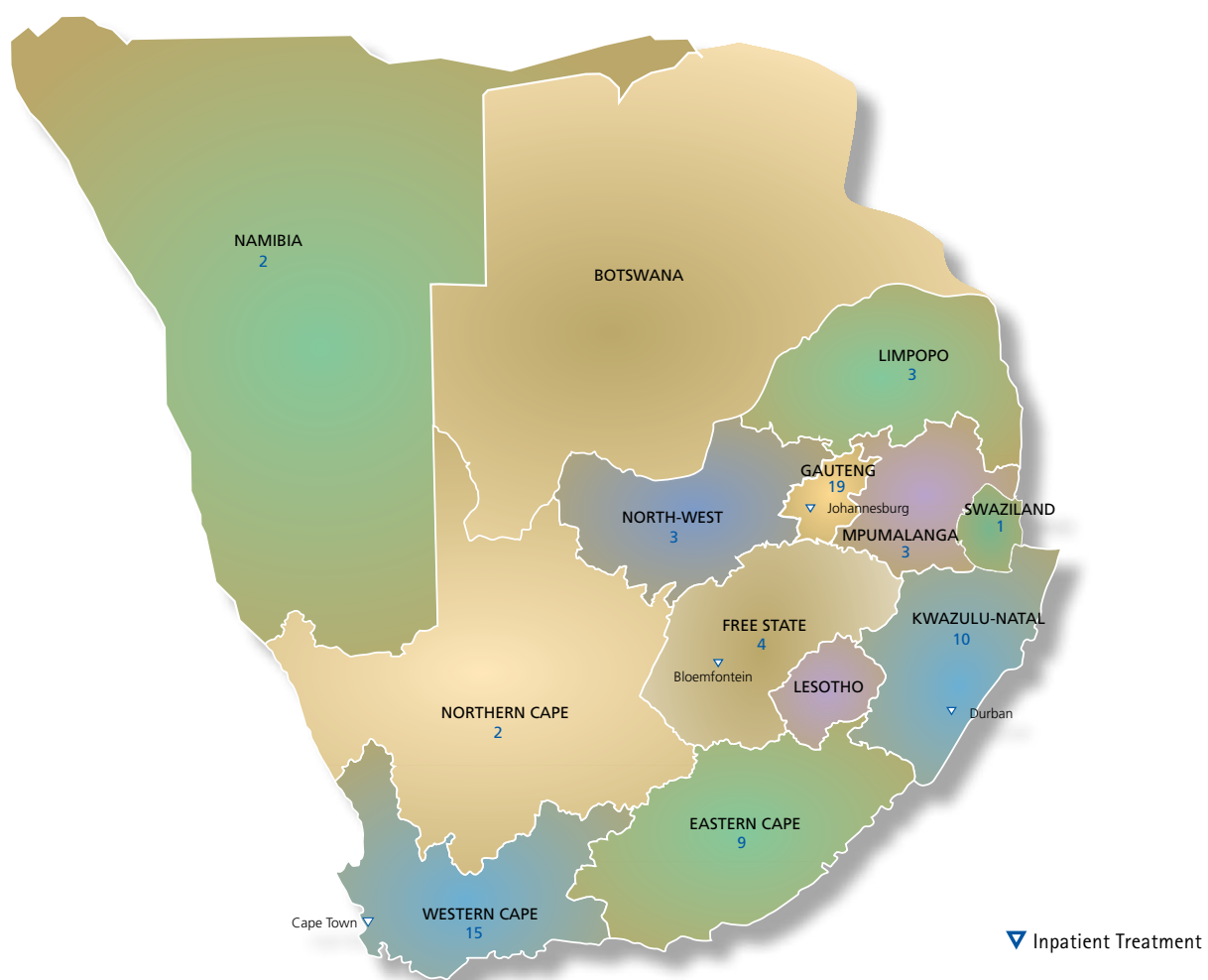
| CHARITIES / BENEFICIARIES     | AMOUNT                | AREA OF FOCUS / PROJECT  |
|-------------------------------|-----------------------|--|
| Emerald Business Assist       | 1 790 968.94          | Emerald provides services to 50 small black-owned businesses in the local area with access to 24/7 business support, a business centre on the property and transport requirements. |
| SMME Conferences and Training | 422 595.32            | Annual conference for all SMME businesses to participate in advice from speakers and training tools.   |
| Pressed in Time               | 72 000.00             | Local laundry business.  |
| <b>TOTAL</b>                  | <b>R 2 285 564.26</b> |  |



## NRGP Treatment Centres



### NUMBER OF NRGp TREATMENT PROFESSIONALS PER PROVINCE AND INPATIENT FACILITIES



| Outpatient Centres |                    |
|--------------------|--------------------|
| Western Cape – 15  | North-West – 3     |
| Free State – 4     | KwaZulu-Natal – 10 |
| Northern Cape – 2  | Gauteng – 19       |
| Eastern Cape – 9   | Namibia – 2        |
| Limpopo – 3        | Swaziland – 1      |
| Mpumalanga – 3     |                    |

| ▽ Inpatient Treatment Centres |
|-------------------------------|
| Bloemfontein                  |
| Cape Town                     |
| Durban                        |
| Johannesburg                  |







## Regulatory Authorities of South Africa



### National Gambling Board of South Africa

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### Eastern Cape Gambling and Betting Board

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## Responsible Gambling Structures



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National Responsible Gambling Programme

Dr Vincent Maphai (Chairperson)  
Professor Peter Collins (Executive Director)

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