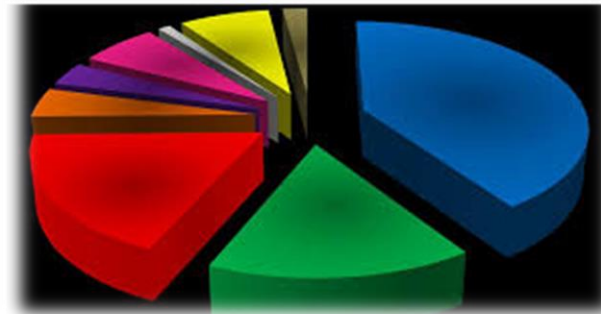




Transformation Overview of the KZN Gaming and Betting Industry

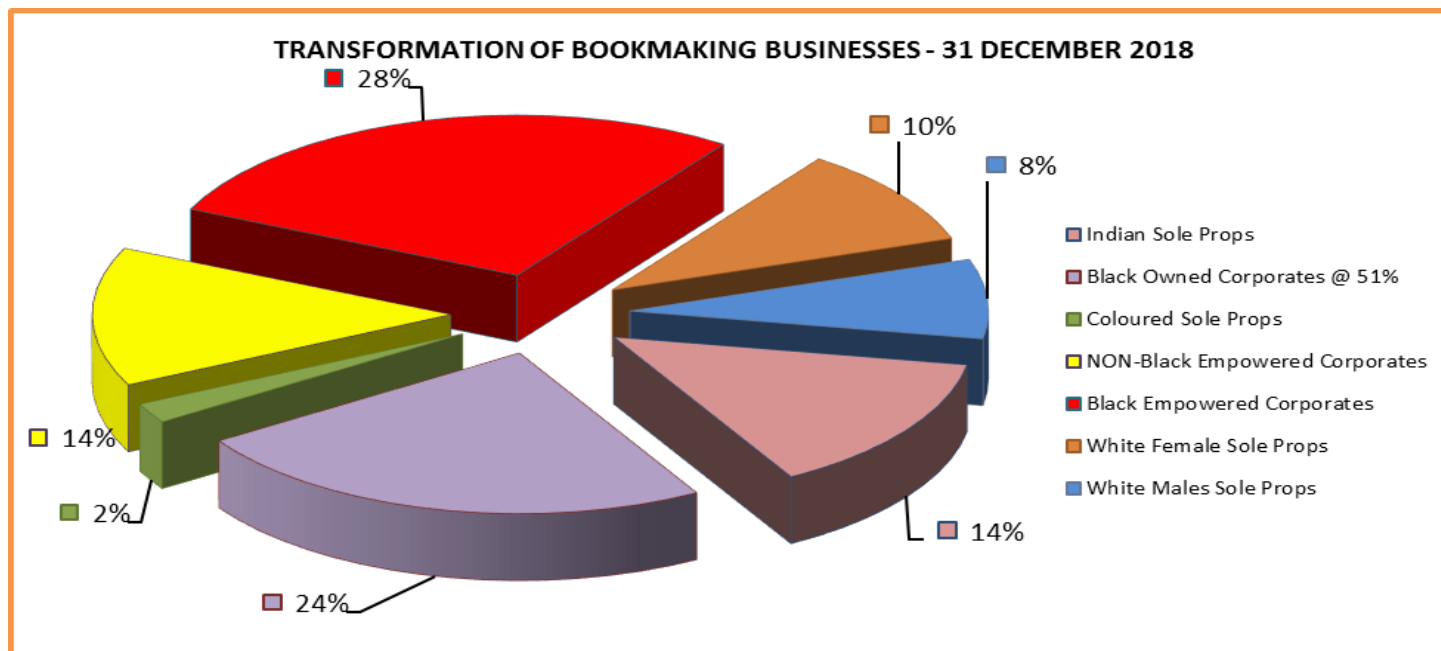


BOOKMAKING INDUSTRY: OWNERSHIP STATISTICS

Ownership participation” by black persons in the industry.

In 2018/19 (as at 31 December 2018): The total ownership is held as follows:

- White male Sole Props – 8%
- White female Sole Props – 10%
- White Owned Corporates – 14%
- Black Owned Corporates @ 50%+ – **24%**
- Black Empowered Corporates @ 26% – **28%**
- Coloured Sole Props – 2%
- Indian Sole Props – 14%



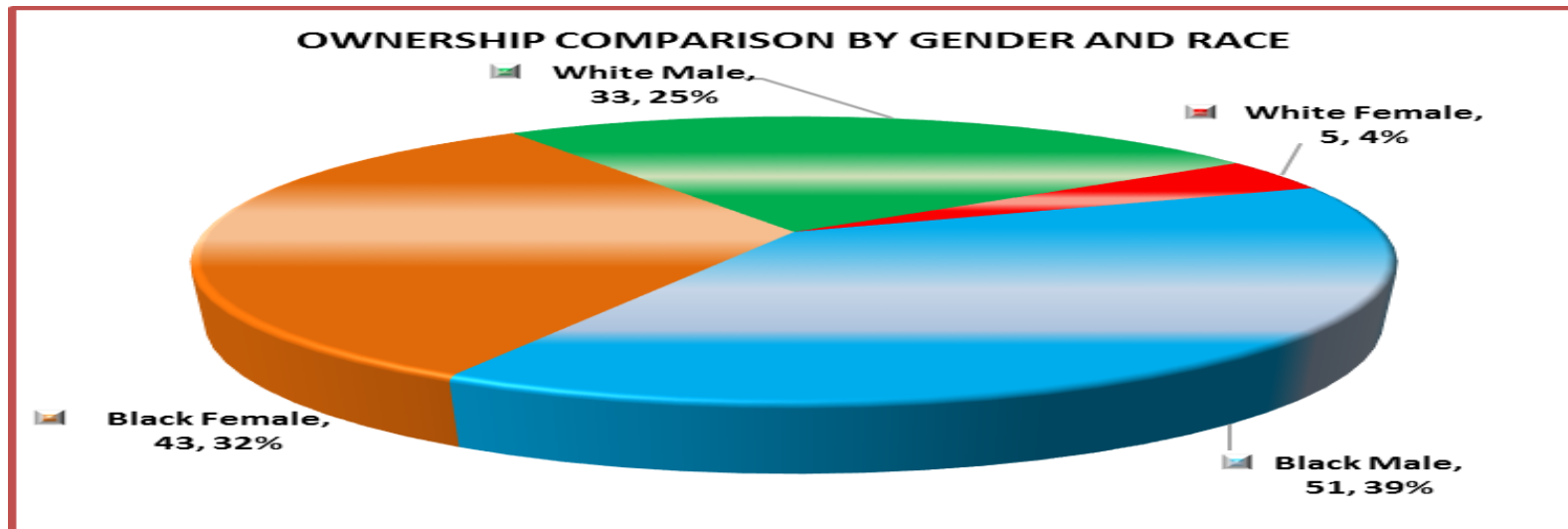
BOOKMAKING INDUSTRY: GENDER BREAKDOWN

The graphs below depict the increase in “Black women” participation in the industry since 2013.

In 2018/19 [as at 31 December 2018]

Gender ownership participation breakdown is as follows:

- White males – 33.25%
- Black males – 51.39%
- White women – 5.4%
- Black women – 43.32%



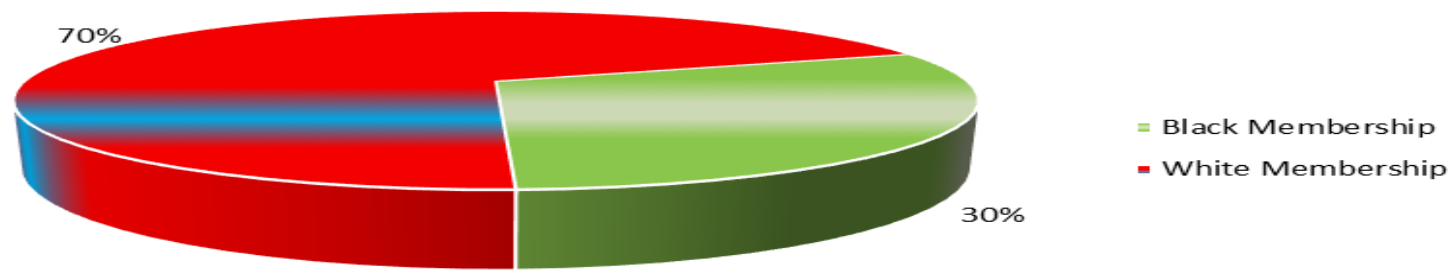
TOTALISATOR AND RACECOURSE OPERATORS: OWNERSHIP / MEMBERSHIP STATISTICS

The statistics below reflect the ownership of Totalisators and racecourse operators and the pie charts, the comparative membership statistics of Gold Circle.

There are currently 2 Totalisator and 2 Racecourse Operator licensees, namely, Gold Circle and Ithotho.

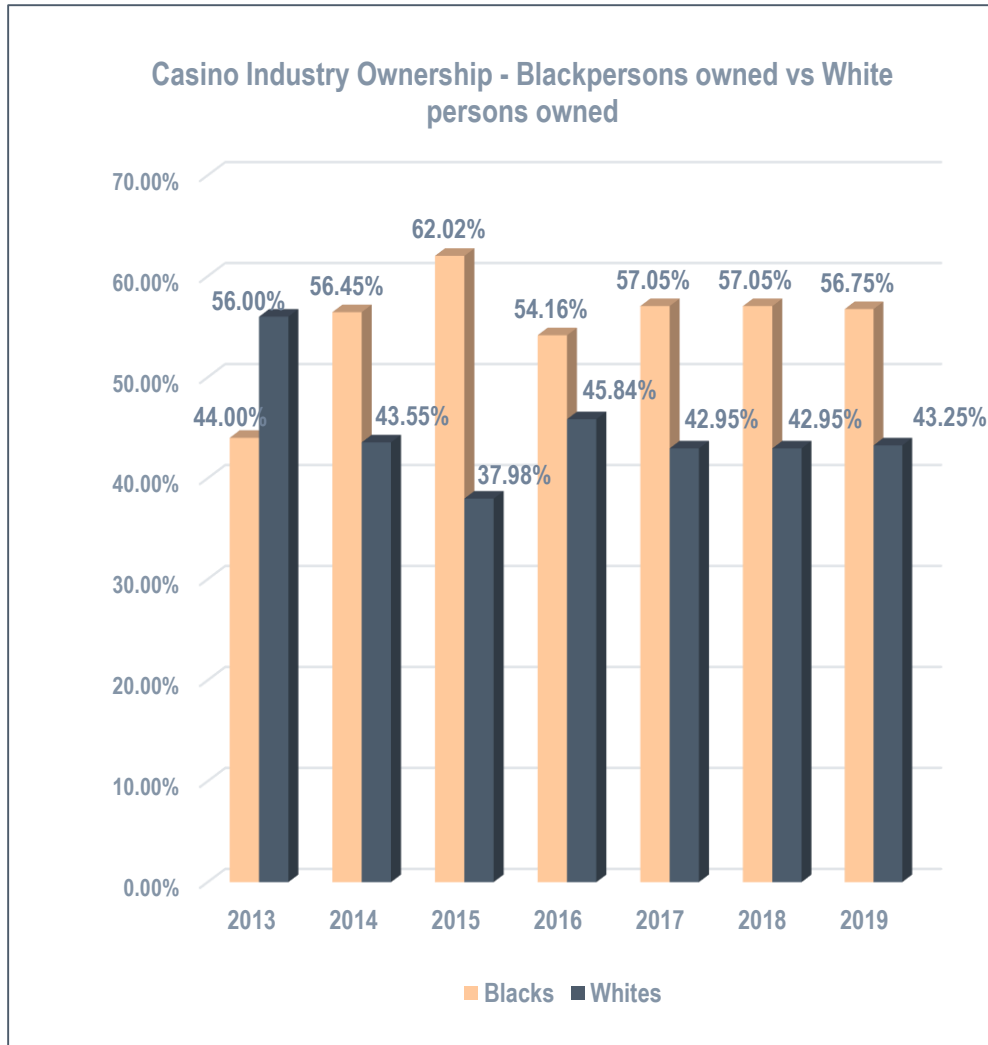
- Ithotho has a 26% HDI ownership.
- Gold Circle Racing Club - as the single shareholder of the company, Gold Circle (Pty) Ltd, comprises of 856 members, broken down as follows:
 - 12 Africans – 1%
 - 13 Coloureds – 2%
 - 232 Indians – 27%
 - 599 Whites – 70%

Gold Circle Membership - As 31 December 2018



CASINO INDUSTRY: OWNERSHIP STATISTICS

The graph below depicts reported ownership statistics within the casino industry.



In 2018/19:

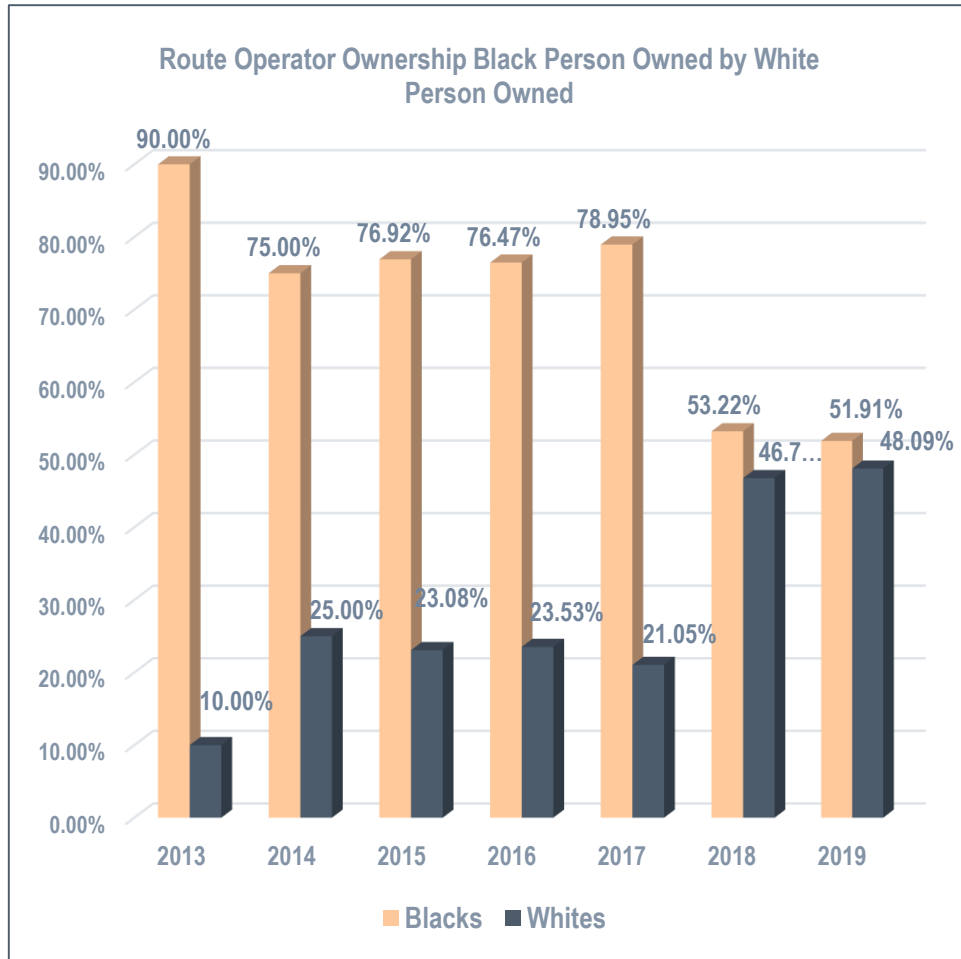
The total ownership as follows:

- White person owned – 43.25%
- Black person owned – 56.75%



LPM INDUSTRY: ROUTE OPERATORS OWNERSHIP STATISTICS

The graph below depicts the reported ownership statistics in the LPM industry.



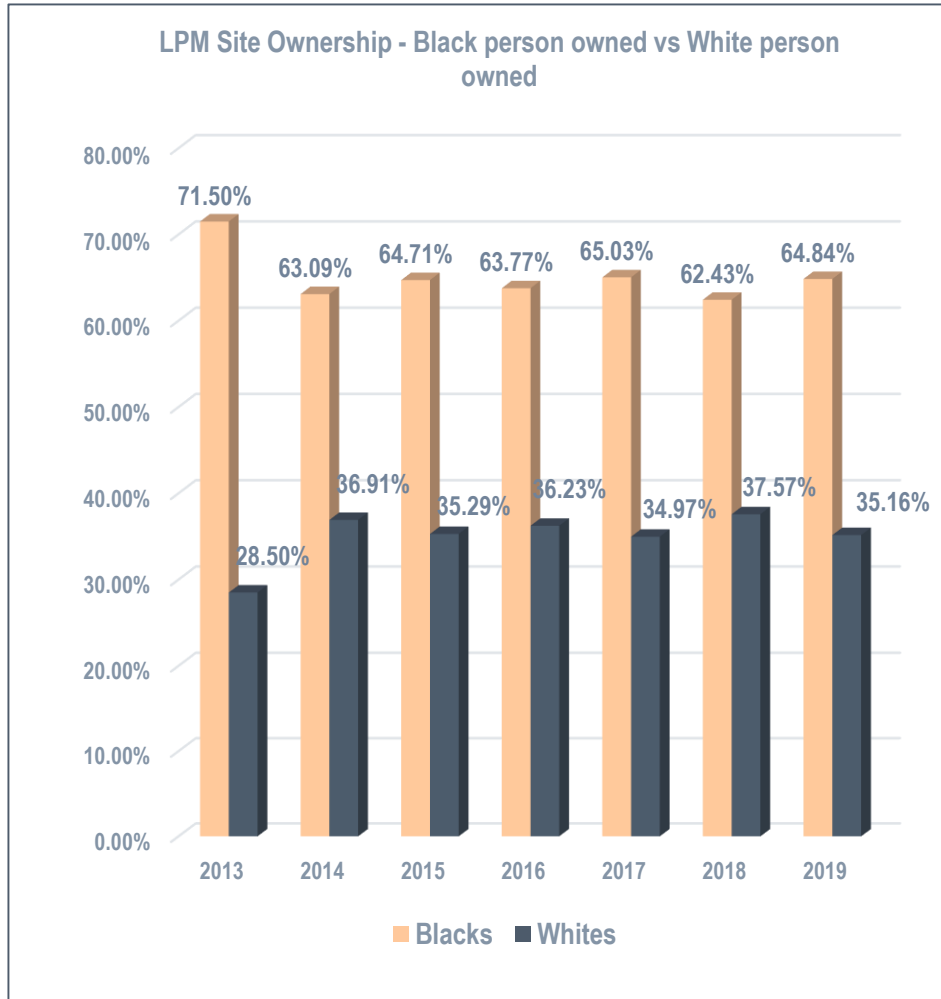
In 2018/19:

The total ownership as follows:

- White person owned – 48.09%
- Black person owned – 51.91%

LPM INDUSTRY: SITES OWNERSHIP STATISTICS

The graph below depicts the number of LPM sites that are owned by Black persons.



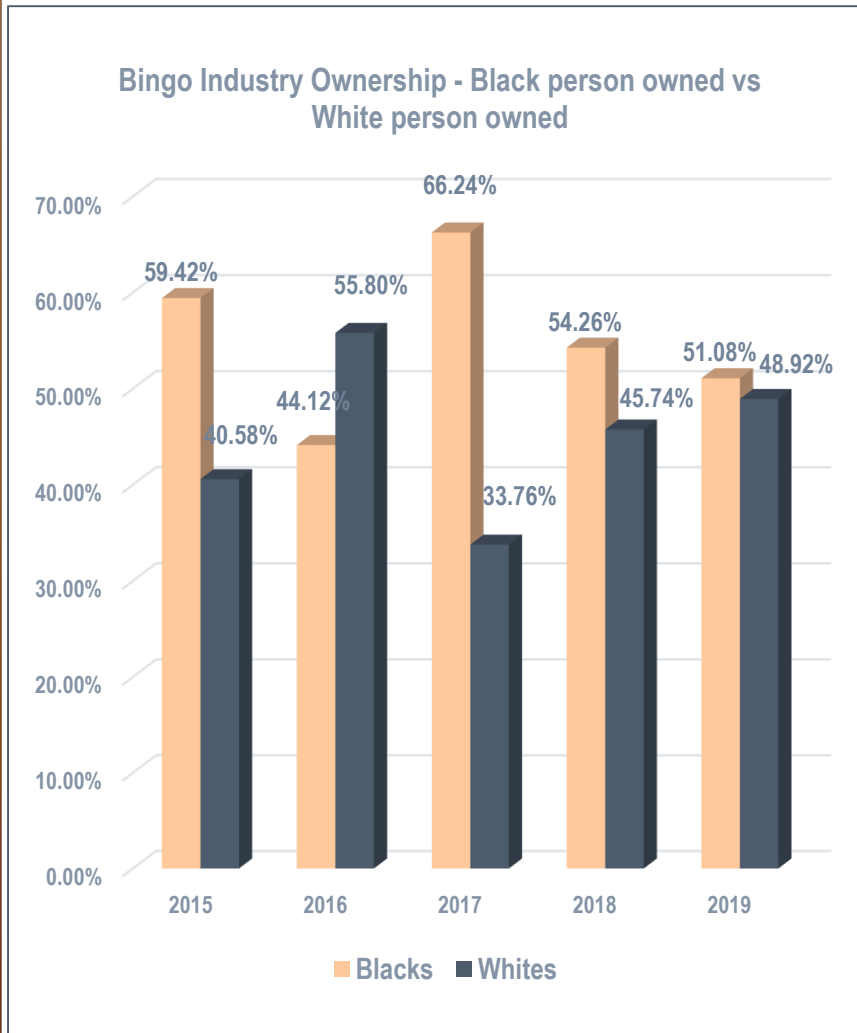
In 2018/19:

The total ownership of sites is as follows:

- White person owned – 35.16%
- Black person owned 64.84%

BINGO INDUSTRY: OWNERSHIP STATISTICS

The graph below depicts the reported ownership statistics in the Bingo industry.



2017/2018:

The total ownership as follows:

- White person owned (acquisition) – 45.74%
- Black person owned – 54.26%

In 2018/19:

The total ownership as follows:

- White person owned – 48.92%.
- Black person owned – 51.08%

