

6 July 2019

Circular to All Licensees: KZNGBB Saturation Study

Dear Licensee

During 2018 the KZN Gaming and Betting Board requested management to undertake an analytical analysis of the saturation of the municipal areas of the Province as input to a framework to establish licensing criteria for all gambling modes in KwaZulu-Natal. This edition of the Saturation Study is the first part of a two part series, which covers Ethekwini, UMgungundlovu and King Cetshwayo Districts.

After the legalisation and initial roll out of gambling in KwaZulu-Natal there is no existing formally documented and publicly consulted rationale for determining numbers of and location of gambling licenses and / or positions. Currently the Board makes its determination on a case by case basis. The Wiehahn Commission in 1995 recommended a total number of casino licenses but this limitation has never been extended to the number of positions to be made available or to other legal gambling modes in the country like Limited Pay-out Machine Sites, Bingo Halls, Bookmaker premises or Totalisator premises. In light of the above, the KZN Gaming and Betting Board has completed and published the first edition of a province-wide saturation study. The purpose of the study to provide the Board with information regarding gambling opportunities, in order to assess the following:

- The appetite for gambling within particular areas in the province;
- The Socio-Economic Impact the gambling within the area studied; and
- The level of saturation of all gambling types in the province.

The recently completed 2018 Socio-Economic Impact Study that was conducted by the KZNGBB (supported by the South African Responsible Gambling Foundation and the University of Witwatersrand) has now been made available on the KZNGBB website.

This serves as an invitation to the industry to provide input and comment on the ***First Edition of the KZNGBB Saturation Study by 7 August 2019***, to Clarissa Naidoo at naidooc@kznghbb.org.za.

Issued by the KZNGBB Office of the Chief Executive: Ms P Baloyi