



Eastern Cape Gambling and Betting Board

Licencee Satisfaction Survey Report



24 June 2013

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Mr RM Zwane
Chief Executive Officer
Eastern Cape Gambling and Betting Board
Quenera Drive
Beacon Bay
EAST LONDON
5247

Dear Mr Zwane

Licencees Satisfaction Survey

Please find enclosed herewith our report relating to results of the satisfaction survey conducted during May 2013.

We exercised reasonable care and skill in the provision of the services set out in our proposal dated 2 November 2012. The procedures undertaken by us in performing this work did not constitute an audit or examination in accordance with International or South African Auditing Standards and consequently, we do not express an opinion in terms of these Standards or any other related legislation.

Should you have any queries in respect of the content of this progress report, please do not hesitate to contact either myself on 083 304 4225 or Janet Rous on 082 4406512 or 043 721 1336.

Yours sincerely

Navin Sing

Director

National Executive: LL Barn Chief Executive AE Swiegers Chief Operating Officer GM Pinnock Audit
DL Kennedy Risk Advisory NB Kader Tax TP Pillay Consulting K Black Clients & Industries
JK Mazzocco Talent & Transformation CR Beukman Finance M Jordan Strategy S Gwala Special Projects
TJ Brown Chairman of the Board MJ Comber Deputy Chairman of the Board
Regional Leader: GC Brazier

A full list of partners and directors is available on request

B-BBEE rating: Level 2 contributor in terms of the Chartered Accountancy Profession Sector Code

Member of Deloitte Touche Tohmatsu Limited

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Abbreviations

The following abbreviations have been used in this report.

Abbreviation	Full name and Description
Deloitte	Deloitte & Touche
ECGGB	Eastern Cape Gambling and Betting Board
EPS	Web based electronic perception survey

Annexures

The following is a list of annexures attached to this report in support of our findings, comprising of documents generated by Deloitte and those obtained from Eastern Cape Gambling and Betting Board and certain third party individuals and entities

Document reference	Document Description
Annexure A	Schedule of Licencees identified
Annexure B	Detailed Report

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1. Introduction

- 1.1. The management of the Eastern Cape Gambling and Betting Board (ECGGB) appointed Deloitte & Touche (Deloitte) to conduct a satisfaction survey to assess the perception of Licencees regarding a broad range of issues relating to the mandate of the ECGGB.
- 1.2. The objective of the survey was to assess, through direct feedback from Licencees, how the ECGGB has been executing and implementing its mandate.
- 1.3. The survey commenced on Monday 29 April 2013.

2. Survey process

- 2.1. The survey was to include the completion of a web-based electronic perception survey (EPS) by Licencees, as well as telephonic and one-on-one interviews.
- 2.2. The survey was to focus on responses either through the EPS, one-on-one interviews and telephonic interviews, from the following:
 - Four Casino licences
 - Two Route Operator licences;
 - 150 Gambling Machine Site licences;
 - One Totalisator licence;
 - Seven Bookmakers' licences; and
 - Two Racecourse licences.
- 2.3. No Bingo licences were included as the applications for fifteen bingo licences closed on 4 December 2012 and no licence had been allocated at the time of our appointment.
- 2.4. The approach was to first obtain responses through the EPS and where possible, we had planned to undertake one-on-one interviews to confirm the information obtained through the EPS.
- 2.5. Where Licencees either did not have access to the EPS or had not completed the EPS within the prescribed timeframes, we planned to conduct telephonic interviews.
- 2.6. As explained below under the heading "Limitations and Qualifications", it was not possible to apply the EPS process and we therefore only conducted telephonic and one-on-one interviews. The survey team captured the responses from the interviewees into the EPS database on behalf of the respondents.
- 2.7. We visited the following sites:
 - Hemmingways Casino
 - Queens Casino
 - Wild Coast Sun Casino, and
 - The Boardwalk Casino.

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- 2.8. We telephonically engaged with 95 Licencees. The names of these Licencees have not been included in this report to ensure anonymity of the participants.
- 2.9. The participants were guided through a series of questions. The responses to the pre-determined questions are anonymous and subject to strict security measures and advanced server security to ensure that the anonymity is maintained.
- 2.10. A number of confirmatory questions were built into the questionnaire and the questions were structured in a specific sequence for control purposes. A question had to be answered before the participant could move to the next question and the system was specifically designed so that the participant could not return to an earlier question to change the original response. We had to ensure that the integrity of the controls built into the process, even though a manual questionnaire process was used and later captured into the EPS database, was maintained. Hence, we built-in additional control and verification processes to ensure that the data captured was as per the manual questionnaires.
- 2.11. Certain questions were linked, with the objective of providing further insight into the responses and to identify any anomalies. The links to the general questions are detailed in Chapter 5.

3. Qualifications

- 3.1. We have not influenced the responses provided, made any assumptions nor have we expressed any opinions relating to the results of the survey. Consequently, our analysis has been based exclusively on the responses by the participants of the survey.
- 3.2. For the EPS process to have been successful, it was critical for the process to have been introduced and participants taken through the process in a workshop. Although it was agreed with the ECGBB that the process would be introduced at a Licencees' meeting, this did not materialise. The survey team was also requested to complete the survey within two weeks from the date of commencement, instead of the three weeks that had been proposed. Hence, it was not possible to optimise the benefits (time, costs, accuracy of information) of the EPS process as under the circumstances, we had to complete a manual questionnaire during the site visits and telephonic surveys.
- 3.3. Of the Licencees identified during the survey process, we were unable to contact 68 (35%) of them, despite making three attempts on different days of the week and at different times of the day.
- 3.4. During the telephonic survey, we found that communication was a significant challenge for various reasons (eg. Some Licencees do not have telephones or records have not been updated to show their latest contact details, no computers or no email and internet access, or they did not want to participate in the survey). These challenges should be considered by the ECGBB when conducting future surveys.

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4. Participants in the survey

- 4.1. The number of Licencees identified during the survey differs from the number of Licencees set out in the Terms of Reference (TOR). According to the TOR attached to the request for quotation, the number of Licencees was reflected as 166, which was less than the 172 Licencees listed in the contact schedules provided to us by representatives of the ECGBB.
- 4.2. However, according to the schedules of Licencees provided to us by Operators, during the survey, we identified 193 Licencees. The schedule of Licencees identified is attached hereto as **Annexure A**.
- 4.3. Of the 193 Licencees identified, we could not contact 68 (35%), despite making three attempts on different days of the week and at different times of the day.
- 4.4. In respect of the remaining 133 Licencees, we were able to complete the surveys with 99 Licencees, comprising of the following:
- All four casinos
 - The Totalisator
 - Six bookmakers
 - Two manufacturers, and
 - 78 site Licencees.
- 4.5. Although we were able to engage with a further 25 Licencees, surveys were not completed due to :

Number of instances	Reason for not completing the survey
11	The manager declining to complete the survey
14	The manager being unavailable to complete the survey despite the survey team making three attempts on different days of the week and at different times of the day

- 4.6. As requested during the initial briefing held on 1 February 2013, we completed multiple surveys at the casinos to ensure that a wide range of responses were obtained. The number of surveys completed at each casino were as follows:

Name of Casino	Number of surveys
Hemmingways	2
Boardwalk	5
Queens	4
Wild Coast	5
Total	16

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4.7. The responses to 111 surveys have been analysed based on the discretionary answers provided in the anonymous survey. The 111 consist of:

- 95 Licencees other than the four casinos that completed surveys, and
- 16 surveys completed by casino personnel.

5. Summary of observations from responses by participants

5.1. We have summarised below a high level analysis of the responses by participants, under relevant headings as per the questionnaire. Since this was the first survey in this area, we have not provided any comparative analysis, but the findings in this survey would provide useful data for comparison with future surveys of this nature.

5.2. General

5.2.1 To ensure the integrity and validity of responses by participants, the questions were cross referenced to confirmatory questions as follows:

- Question 1 – 5, 11, 16, 17, 18, 19, 20, 21, 22, 23, 25, 27, 28, 29
- Question 2 – 9, 12, 31, 32, 37, 40, 41, 42,
- Question 3 – 8, 24, 26, 29, 33, 35, 43
- Question 4 – 6, 11, 13, 23, 28, 34, 42

From our review of the responses, we did not identify any anomalies or contradictory responses.

5.2.2 In summary, based on the number of participants that rated the ECGBB with an overall score of 6 and above out of 10 possible marks (1 being the worst and 10 the best), although there is room for improvement the following is pleasing to note:

- **92%** of the respondents rated the ECGBB above average in the execution of its gambling regulation mandate
- **84%** of respondents rated the ECGBB's communication as being above average
- **85%** of respondents rated the ECGBB's response to application, queries and concerns as being above average
- **89%** of respondents rated the ECGBB's alignment with the provisions of the Act and the objectives of the industry as being above average

5.3. Inspection and Testing of Equipment

5.3.1 Questions 5 to 9

- 85.6% of the respondents either agreed or strongly agreed to the manner, application and ability of the ECGBB with regards to the inspection and testing of equipment while 4.8% either disagreed or strongly disagreed. The remaining balance of 9.6% were unsure/did not know.

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5.4. Taxes and Penalties

5.4.1. Questions 10 to 14

- 73% of the respondents either agreed or strongly agreed to the manner, application and ability of the ECGBB with regards to levying taxes and penalties while 7.4% either disagreed or strongly disagreed. The remaining 19.6% were unsure/did not know.

5.5. Compliance Services

5.5.1 Questions 15 to 24

- 85.2% of the respondents either agreed or strongly agreed to the manner, application and ability of the ECGBB with regards to compliance matters while 5% either disagreed or strongly disagreed. The remaining 9.8% were unsure/did not know.

5.6. Law Enforcement and Gaming Control

5.6.1 Questions 25 to 26

- 68.5% of the respondents either agreed or strongly agreed to the manner, application and ability of the ECGBB with regards to law enforcement and gaming control while 10% either disagreed or strongly disagreed and the balance were unsure/did not know.

5.7. Gaming Control

5.7.1 Questions 27 to 32

- 62.3% of the respondents either agreed or strongly agreed to the manner, application and ability of the ECGBB with regards to gaming control while 11.5% either disagreed or strongly disagreed and the balance were unsure/did not know.

5.8. Consumer Protection and Public Education

5.8.1 Questions 33 to 39

- 50% of the respondents either agreed or strongly agreed to the manner, application and ability of the ECGBB with regards to consumer protection and education while 13.3% either disagreed or strongly disagreed and the balance were unsure/did not know.

5.9. Stakeholder Engagement

5.9.1 Questions 40 to 43

- 77.8% of the respondents either agreed or strongly agreed to the manner, application and ability of the ECGBB with regards to stakeholder engagement

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while 18.5% either disagreed or strongly disagreed and the balance were unsure/did not know.

- 5.10. The detailed results of each question per division are set out in **Annexure B** attached hereto.

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6. Our analysis of the responses

As agreed, we have included the following table which summarises the “negative” based responses to EPS questions i.e. both “disagreed” and “strongly disagreed” that were included in a risk rating as follows:

Rating	Colour Key
Less than 5% of respondents disagreed/strongly disagreed	
6% to 19% of respondents disagreed/disagreed strongly	
Greater than 20% of respondents disagreed/disagreed strongly	

	Question	Rating in Colour
1	Out of 10 (one being poor, 10 being excellent), how would you rate the ECGBB in executing its mandate of gambling regulation	
2	Out of 10 (one being poor, 10 being excellent), how would you rate ECGBB's communication with your establishment	
3	Out of 10 (one being poor, 10 being excellent), how would you rate ECGBB's response to applications, enquiries and/or concerns	
4	Out of 10 (one being poor, 10 being excellent), how would you rate ECGBB's ability to align itself with the provisions of the Act and the objectives of the industry	

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	Question	Rating in Colour
5	Inspection and testing of equipment by ECGBB Inspectors is carried out in accordance with a communicated schedule and methods	
6	During the inspection, the ECGBB inspectors demonstrate a clear understanding of the provisions governing my establishment	
7	ECGBB Inspectors conduct themselves in a professional manner	
8	Feedback on the inspections and tests are communicated timeously	
9	The feedback is constructive and adds value to my establishment	
10	The schedules attached to the Act and the regulations governing the collection of fees and taxes are clear and understandable	
11	ECGBB applies penalties and/or interest in line with the determinations of the Act and the Rules & Regulations	
12	The decisions to levy penalties and/or interest are communicated to the affected party in a clear and open manner	
13	ECGBB levy penalties and/or interest in a fair and consistent manner	
14	The levying of penalties and/or interest are effective to reduce late payment	
15	The frequency of compliance checks is sufficient	
16	Gambling Devices in my establishment are verified annually against a register of the serial numbers of devices	

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	Question	Rating in Colour
	maintained by the ECGBB	
17	Employees in my establishment are verified annually against a register of the "black-listed" employees maintained by the ECGBB	
18	Revenue Audits are conducted quarterly by the ECGBB	
19	FICA compliance audits are conducted quarterly by the ECGBB	
20	My establishment's annual financial statements are analysed bi-annually by the ECGBB	
21	All audits are conducted in a professional manner	
22	The audits are conducted in a way that does not interfere with the daily operations of my establishment	
23	The persons conducting the audits demonstrate a clear understanding of the industry, the operational processes and the restrictions placed on my establishment	
24	Results of audits are communicated back to my establishment	
25	The ECGBB's List of Excluded Persons is updated regularly	
26	The current exclusion process is effectively implemented	
27	ECGBB inspects licence holders in an effective manner	

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	Question	Rating in Colour
28	The actions taken by the ECGBB identify and combat illegal gaming effectively	
29	The process to report illegal gambling sites to the ECGBB is user-friendly and has been communicated extensively	
30	The ECGBB responds promptly and decisively to reports of illegal gambling	
31	The actions taken against illegal gambling are communicated regularly to stakeholders	
32	The public awareness campaign driven by the ECGBB is addressing illegal gambling and its consequences effectively	
33	The Gambling Consumer Protection Strategy adopted by the ECGBB has been communicated adequately	
34	ECGBB conducts research into the impact of gambling in the Eastern Cape in terms of the Gambling Consumer Protection Strategy	
35	Results of the research are communicated to interested parties	
36	The declaration of September as the "Responsible Gambling Month" has heightened awareness	
37	The Responsible Gambling programme conducted by the ECGBB educates the public adequately	
38	The introduction of the NRGF toll-free helpline has enhanced the Responsible Gambling programme	
39	A provincially-based help programme will be more effective to address problem gambling	

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	Question	Rating in Colour
40	My establishment receives regular updates/feedback from the ECGBB	Red
41	The current channels of communication used by the ECGBB are effective	Yellow
42	The strategic imperatives of the ECGBB are communicated clearly	Red
43	The ECGBB responds to our concerns timeously	Yellow

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7. Summary of responses: One-on-one interviews

- 7.1. As our survey was designed solely for statistical purposes, it did not cater for additional comments from participants.
- 7.2. However, during our one-on-one interviews with Licencees, the following issues were raised:
- 7.2.1. The turnaround time for vetting in respect of new employees is not time-sensitive, which result in unnecessary delays.
- 7.2.2. The notification of updates to the new applicable legislation is often delayed.
- 7.2.3. The ECGBB's interpretation of certain rules is unclear, which has caused confusion amongst the Licencees.
- 7.2.4. The level of experience and/or knowledge amongst the ECGBB inspectors is inconsistent, resulting in varied decisions and/or findings during the inspections.
- 7.2.5. The turnaround time for addressing machine malfunction not time-sensitive, which result in unnecessary delays on occasions.
- 7.2.6. The frequency of compliance checks should increase to ensure that issues identified are expediently rectified.

8. Lessons learnt

- 8.1. From this survey we have learnt that:
- The total number of licencee agents varied between the ECGBB and the main licence holders, without explanation, increasing the risk of excluding targeted participants;
 - The schedule provided by the ECGBB included licencees that had lost their licences, which resulted in hostile response to our initial contact;
 - A significant number of the licencee agents cannot be reached by telephone and/or have no access to electronic communication.
 - The one-on-one interviews yielded more prompt responses because:
 - Our approach and discussions between the surveyor and the participants overcame concerns immediately,
 - Questions could be asked in a number of ways to facilitate true understanding by the participant.
 - There are a few participants, mainly participants at the casinos, that are able and willing to participate in an online survey option.
 - The communication strategy should be developed and implemented before the survey commences. The electronic communication sent out by the ECGBB was not received by all participants.
 - The timeline for the survey, limited to only two weeks, is too short. This did not allow the survey team the opportunity to call participants that were too busy and/or those requiring time to consult with the main Licencees.

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9. Recommendations

- 9.1. We recommend that the ECGBB consider the following during the next survey to be conducted:
- 9.1.1. A communication strategy be developed informing the participants of the survey which should include multiple media options, including:
- Notification via short message service (SMSs), and/or
 - Printed media.
- 9.1.2. Any survey process adopted in future should contain both an online survey and one-on-one interviews. The surveys should incorporate a component to illicit input regarding possible improvements to service delivery by the ECGBB.
- 9.1.3. The details of the licencee agents should be updated and/or confirmed during each inspection, to ensure that the survey team has current contact information.
- 9.2. Strategies should be considered to address the issues identified where greater than 20% of participants disagreed or disagreed strongly, in particular:
- Regular communication to licence holders even if it's through the website, to inform them about developments.
 - As part of the ECGBB and licence holder's meetings, the strategic objectives get discussed to ensure overall understanding
 - The ECGBB should communicate issues that may cause delays with feedback that licence holders are waiting for.
 - Junior level inspectors should be sent with more experienced inspectors initially so as to ensure that skills are transferred to the junior levels of staff.

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Annexure A

Schedule of Licencees identified



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Schedule of Licencees identified

Name	Districts
Castle Rock Hotel	Alfred Nzo
East Coast Sports Bar	Alfred Nzo
V- Café Matatiele	Alfred Nzo
Spin & Win Entertainment World	Alfred Nzo
Amadoda's Tavern	Buffalo City - Amathole
Bernie's Cigar Bar	Buffalo City - Amathole
Bernies Cigar Bar - Cambridge	Buffalo City - Amathole
Bisho Sports Bar	Buffalo City - Amathole
Bra G's	Buffalo City - Amathole
Buccaneers	Buffalo City - Amathole
Cannon's Pool Pub & Grub	Buffalo City - Amathole
Cindy's Pinto Place	Buffalo City - Amathole
Dave's Betting Shop / Hollywood Sportsbook EL	Buffalo City - Amathole
Doemies Tavern	Buffalo City - Amathole
Drop Off Saloon	Buffalo City - Amathole
Fig Tree	Buffalo City - Amathole
Gonubie Hotel	Buffalo City - Amathole
Highgate Hotel	Buffalo City - Amathole
Idutywa Hotel	Buffalo City - Amathole
Inqaba Tavern	Buffalo City - Amathole
Jacqueline's	Buffalo City - Amathole
Kayser's Beach Pub & Grub	Buffalo City - Amathole
Kokes Tavern	Buffalo City - Amathole
Kwamfani's Tavern	Buffalo City - Amathole
KWT Club	Buffalo City - Amathole
Madiba's Tavern	Buffalo City - Amathole
Monthys The Hub Beacon Bay	Buffalo City - Amathole
Natalie's Nite Club	Buffalo City - Amathole
Orange Grove Hotel	Buffalo City - Amathole
Phumelela East London North End Tab	Buffalo City - Amathole
Phumelela KWT	Buffalo City - Amathole
Premier Deli	Buffalo City - Amathole
Raggies	Buffalo City - Amathole
Royal Hotel	Buffalo City - Amathole
Tasha's Sportsbar	Buffalo City - Amathole
The Calabash	Buffalo City - Amathole
The Roadhouse	Buffalo City - Amathole
Truck Stop & Eat	Buffalo City - Amathole
Turnbull Park	Buffalo City - Amathole
Wayside Hotel	Buffalo City - Amathole

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Schedule of Licencees identified

Name	Districts
Wesbank Protea	Buffalo City - Amathole
Willowvale Hotel	Buffalo City - Amathole
Naughty Lizard	Buffalo City - Amathole
Batch 20 - Mpumelelo Tavern	Buffalo City - Amathole
Pirates Club	Buffalo City - Amathole
Batch 19 - Mzantsi Pub	Buffalo City - Amathole
Batch 19 - Vgee's Tavern	Buffalo City - Amathole
Batch 20 - Central Tavern	Buffalo City - Amathole
Batch 20 - Ckooliz Tavern	Buffalo City - Amathole
Burgersdorp Lodge	Chris Hani
Cradock Restaurant & Sportsbar	Chris Hani
Jola's Mens Bar	Chris Hani
Karoo Country Inn	Chris Hani
Mountain View Country Inn	Chris Hani
Phumelela Cradock	Chris Hani
Wilson's / Jeff's Palace	Chris Hani
Phumelela Qtn	Chris Hani
Batch 19 - Zola 7 Tavern	Chris Hani
Batch 16 - Sir George's Pub & Grill	Chris Hani
Batch 6 - Sporty's	Chris Hani
Batch 6 - Zamaland	Chris Hani
Lucky Seven	Joe Gqabi
24/7 Big 5	Nelson Mandela - Cacadu
Aiden's Sports bar	Nelson Mandela - Cacadu
Ally Cats	Nelson Mandela - Cacadu
Angora Inn Hotel	Nelson Mandela - Cacadu
Asian Tavern	Nelson Mandela - Cacadu
Beijing Restaurant	Nelson Mandela - Cacadu
Big Waves Sports Bar	Nelson Mandela - Cacadu
Billricks Sports bar	Nelson Mandela - Cacadu
Cads Sports bar / Club Twins	Nelson Mandela - Cacadu
Café Rouge	Nelson Mandela - Cacadu
Candys Resto Bar	Nelson Mandela - Cacadu
Charlee's Tavern	Nelson Mandela - Cacadu
Captain Central/The Judge	Nelson Mandela - Cacadu
CJ's Sports bar	Nelson Mandela - Cacadu
Cue Zone Sports bar	Nelson Mandela - Cacadu
Dagwood Pub & Diner	Nelson Mandela - Cacadu
Die Opstal	Nelson Mandela - Cacadu
Doppies Bar	Nelson Mandela - Cacadu

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Schedule of Licencees identified

Name	Districts
Euro's Place	Nelson Mandela - Cacadu
Exotic Bets	Nelson Mandela - Cacadu
Fanpark Sportsbar	Nelson Mandela - Cacadu
Fantasy Sportsbar	Nelson Mandela - Cacadu
Farm House Tavern	Nelson Mandela - Cacadu
Gary's Pool & Sports bar	Nelson Mandela - Cacadu
G-Note	Nelson Mandela - Cacadu
Greenacres Sports club	Nelson Mandela - Cacadu
Gremlins	Nelson Mandela - Cacadu
Grunters Pub & Grub	Nelson Mandela - Cacadu
Hen Den	Nelson Mandela - Cacadu
Henno's Sports bar	Nelson Mandela - Cacadu
Hollywood Sportsbook	Nelson Mandela - Cacadu
Humepark Sports bar	Nelson Mandela - Cacadu
Hunters Retreat	Nelson Mandela - Cacadu
Hollywood Korsten	Nelson Mandela - Cacadu
Jades Sports Bar	Nelson Mandela - Cacadu
Jaggers	Nelson Mandela - Cacadu
Jame's Tavern	Nelson Mandela - Cacadu
J-Bay Tattersalls	Nelson Mandela - Cacadu
Johnny Rockets	Nelson Mandela - Cacadu
Julie's Restaurant & Take Aways	Nelson Mandela - Cacadu
Kariba's Tavern	Nelson Mandela - Cacadu
KLM Sports bar	Nelson Mandela - Cacadu
Lazy Leopard	Nelson Mandela - Cacadu
La Dee Daa	Nelson Mandela - Cacadu
Legacy Sportsbar	Nelson Mandela - Cacadu
Leonardo's Shooters Pool Bar	Nelson Mandela - Cacadu
Local Pub & Grub	Nelson Mandela - Cacadu
Loxion	Nelson Mandela - Cacadu
Lounge Bar	Nelson Mandela - Cacadu
Mandarin Inn	Nelson Mandela - Cacadu
Memories Café	Nelson Mandela - Cacadu
MJ Sports Bar	Nelson Mandela - Cacadu
Monte Carlo Lounge	Nelson Mandela - Cacadu
Mulligans	Nelson Mandela - Cacadu
Oasis Entertainment Centre	Nelson Mandela - Cacadu
O'Brian's	Nelson Mandela - Cacadu
Out of Africa	Nelson Mandela - Cacadu
Palm Inn Hotel/ Humansdorp Boutique Hotel	Nelson Mandela - Cacadu

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Schedule of Licencees identified

Name	Districts
Parklane Restaurant	Nelson Mandela - Cacadu
Phumelela Bethelsdorp	Nelson Mandela - Cacadu
Phumelela Commercial	Nelson Mandela - Cacadu
Phumelela Hiles	Nelson Mandela - Cacadu
Phumelela Linton	Nelson Mandela - Cacadu
Phumelela Newton	Nelson Mandela - Cacadu
Phumelela Uitenhage	Nelson Mandela - Cacadu
Phumelela Walmer	Nelson Mandela - Cacadu
Pitstop Sports Bar	Nelson Mandela - Cacadu
Pool City 2	Nelson Mandela - Cacadu
Pool City Action Bar	Nelson Mandela - Cacadu
Rose & Shamrock Hotel	Nelson Mandela - Cacadu
Sgt Peppers	Nelson Mandela - Cacadu
Slip Stream Sports bar B-TYPE	Nelson Mandela - Cacadu
Snorting Grunter	Nelson Mandela - Cacadu
Solid & Stripes	Nelson Mandela - Cacadu
Somerset Hotel	Nelson Mandela - Cacadu
Sovereign Sports Café	Nelson Mandela - Cacadu
Springbok Pub & Grub	Nelson Mandela - Cacadu
Stix Pool bar	Nelson Mandela - Cacadu
The Barking Gheko	Nelson Mandela - Cacadu
The Brewmaster	Nelson Mandela - Cacadu
Sweethearts Sports Bar	Nelson Mandela - Cacadu
The Cameleon	Nelson Mandela - Cacadu
The Copper Kettle	Nelson Mandela - Cacadu
The Highlander	Nelson Mandela - Cacadu
The Woods Sports bar	Nelson Mandela - Cacadu
Tiny's	Nelson Mandela - Cacadu
Tongsan Restaurant	Nelson Mandela - Cacadu
Twister's Restaurant	Nelson Mandela - Cacadu
Uitenhage Racing Club	Nelson Mandela - Cacadu
Victory Dinner	Nelson Mandela - Cacadu
Wally's Place	Nelson Mandela - Cacadu
Waterford/Lounge Bar	Nelson Mandela - Cacadu
Wharf Street Tab	Nelson Mandela - Cacadu
Ben's Pub & Grub	OR Tambo
Boltina's	OR Tambo
Coastal Needles Hotel	OR Tambo
Ellies Pool Bar	OR Tambo
Engcobo Hotel	OR Tambo

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Schedule of Licencees identified

Name	Districts
Extravaganza Tavern	OR Tambo
Hollywood Mthatha	OR Tambo
Palagas Pub	OR Tambo
Sutherland Hotel	OR Tambo
Tsomo Hotel	OR Tambo
Two Star Hotel	OR Tambo
Merino Hotel	OR Tambo
Phumelela Mthatha	OR Tambo
Batch 16 - Royal Flush Restaurant	OR Tambo
Wild Coast Sun	Casino
Bordwalk Casino	Casino
Hemingways Casino	Casino
Queens Casino	Casino
Vukani Gaming Eastern Cape (Pty) Ltd	Route Operator
Hollywood Sportbook	Bookmarker
Dexter Dealers Cc	Bookmarker
Ebets (Pty) Ltd	Bookmarker
Jeffreys Bay Tattersalls	Bookmarker
Sharoki (Pty) Ltd	Bookmarker
W H Van Der Vyver	Bookmarker
Vincent Tattersalls Cc	Bookmarker
Stanjames Betting (Pty) Ltd	Bookmarker
Phumelela Gaming & Leisure Limited	Totalisator
Sun International Management Limited	Manufacturers
Tsogo Sun Distribution	Manufacturers
Kondura	Manufacturers
IGSS	Manufacturers
Deltatronics	Manufacturers
Tsoaranang Holdings (Pty) Ltd	Manufacturers
Stanjames Betting (Pty) Ltd	Manufacturers

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Eastern Cape Gambling and Betting Board

Annexure B Detailed Report



24 June 2013

Question 1

Out of 10 (one being poor, 10 being excellent), how would you rate the ECGBB in executing its mandate of gambling regulation

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
1	Out of 10 (one being poor, 10 being excellent), how would you rate the ECGBB in executing its mandate of gambling regulation.	1	1	1	
		2	4	4	
		3	0	0	
		4	1	1	
		5	3	3	
		6	5	5	
		7	3	3	
		8	18	16	
		9	32	29	
		10	44	40	
Total			111	100	

Question 2

Out of 10 (one being poor, 10 being excellent), how would you rate ECGBB's communication with your establishment

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
2	Out of 10 (one being poor, 10 being excellent), how would you rate ECGBB's communication with your establishment.	1	6	5	
		2	1	1	
		3	1	1	
		4	2	2	
		5	8	7	
		6	2	2	
		7	12	11	
		8	23	21	
		9	18	16	
		10	38	34	
Total			111	100	

Question 3

Out of 10 (one being poor, 10 being excellent), how would you rate ECGBB's response to applications, enquiries and/or concerns

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
3	Out of 10 (one being poor, 10 being excellent), how would you rate ECGBB's response to applications, enquiries and/or concerns.	1	7	6	
		2	1	1	
		3	0	0	
		4	4	4	
		5	5	5	
		6	11	10	
		7	19	17	
		8	14	13	
		9	16	14	
		10	34	31	
Total			111	100	

Question 4

Out of 10 (one being poor, 10 being excellent), how would you rate ECGBB's ability to align itself with the provisions of the Act and the objectives of the industry

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
4	Out of 10 (one being poor, 10 being excellent), how would you rate ECGBB's ability to align itself with the provisions of the Act and the objectives of the industry.	1	1	1	
		2	0	0	
		3	1	1	
		4	1	1	
		5	9	8	
		6	7	6	
		7	10	9	
		8	14	13	
		9	37	33	
		10	31	28	
Total			111	100	

Question 5

Inspection and testing of equipment by ECGBB Inspectors is carried out in accordance with a communicated schedule and methods

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
5	Inspection and testing of equipment by ECGBB Inspectors is carried out in accordance with a communicated schedule and methods .	Strongly Agree	37	33	
		Agree	54	49	
		Disagree	1	1	
		Strongly Disagree	1	1	
		Don't Know	18	16	
Total			111	100	

Question 6

During the inspection, the ECGBB inspectors demonstrate a clear understanding of the provisions governing my establishment

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
6	During the inspection, the ECGBB inspectors demonstrate a clear understanding of the provisions governing my establishment.	Strongly Agree	33	30	
		Agree	63	57	
		Disagree	0	0	
		Strongly Disagree	0	0	
		Don't Know	15	14	
Total			111	100	

Question 7

ECGBB Inspectors conduct themselves in a professional manner

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
7	ECGBB Inspectors conduct themselves in a professional manner.	Strongly Agree	43	39	
		Agree	60	54	
		Disagree	1	1	
		Strongly Disagree	0	0	
		Don't Know	7	6	
Total			111	100	

Question 8

Feedback on the inspections and tests are communicated timeously

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
8	Feedback on the inspections and tests are communicated timeously.	Strongly Agree	33	30	
		Agree	62	56	
		Disagree	9	8	
		Strongly Disagree	0	0	
		Don't Know	7	6	
Total			111	100	

Question 9

The feedback is constructive and adds value to my establishment

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
9	The feedback is constructive and adds value to my establishment.	Strongly Agree	26	23	
		Agree	64	58	
		Disagree	14	13	
		Strongly Disagree	0	0	
		Don't Know	7	6	
Total			111	100	

Question 10

The schedules attached to the Act and the regulations governing the collection of fees and taxes are clear and understandable

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
10	The schedules attached to the Act and the regulations governing the collection of fees and taxes are clear and understandable.	Strongly Agree	22	20	
		Agree	71	64	
		Disagree	8	7	
		Strongly Disagree	1	1	
		Don't Know	9	8	
Total			111	100	

Question 11

ECGGB applies penalties and/or interest in line with the determinations of the Act and the Rules & Regulations

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
11	ECGGB applies penalties and/or interest in line with the determinations of the Act and the Rules & Regulations.	Strongly Agree	20	18	
		Agree	67	60	
		Disagree	5	5	
		Strongly Disagree	1	1	
		Don't Know	18	16	
Total			111	100	

Question 12

The decisions to levy penalties and/or interest are communicated to the affected party in a clear and open manner

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
12	The decisions to levy penalties and/or interest are communicated to the affected party in a clear and open manner.	Strongly Agree	14	13	
		Agree	56	50	
		Disagree	6	5	
		Strongly Disagree	3	3	
		Don't Know	32	29	
Total			111	100	

Question 13

ECGGB levy penalties and/or interest in a fair and consistent manner

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
13	ECGGB levy penalties and/or interest in a fair and consistent manner.	Strongly Agree	16	14	
		Agree	53	48	
		Disagree	10	9	
		Strongly Disagree	1	1	
		Don't Know	31	28	
Total			111	100	

Question 14

The levying of penalties and/or interest are effective to reduce late payment

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
14	The levying of penalties and/or interest are effective to reduce late payment.	Strongly Agree	21	19	
		Agree	66	59	
		Disagree	5	5	
		Strongly Disagree	0	0	
		Don't Know	19	17	
Total			111	100	

Question 15

The frequency of compliance checks is sufficient

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
15	The frequency of compliance checks is sufficient.	Strongly Agree	29	26	
		Agree	71	64	
		Disagree	5	5	
		Strongly Disagree	0	0	
		Don't Know	6	5	
Total			111	100	

Question 16

Gambling Devices in my establishment are verified annually against a register of the serial numbers of devices maintained by the ECGBB

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
16	Gambling Devices in my establishment are verified annually against a register of the serial numbers of devices maintained by the ECGBB.	Strongly Agree	30	27	
		Agree	62	56	
		Disagree	2	2	
		Strongly Disagree	1	1	
		Don't Know	16	14	
Total			111	100	

Question 17

Employees in my establishment are verified annually against a register of the "black-listed" employees maintained by the ECGBB

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
17	Employees in my establishment are verified annually against a register of the "black-listed" employees maintained by the ECGBB.	Strongly Agree	30	27	
		Agree	60	54	
		Disagree	1	1	
		Strongly Disagree	0	0	
		Don't Know	20	18	
Total			111	100	

Question 18

Revenue Audits are conducted quarterly by the ECGBB

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
18	Revenue Audits are conducted quarterly by the ECGBB.	Strongly Agree	30	27	
		Agree	58	52	
		Disagree	9	8	
		Strongly Disagree	0	0	
		Don't Know	14	13	
Total			111	100	

Question 19

FICA compliance audits are conducted quarterly by the ECGBB

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
19	FICA compliance audits are conducted quarterly by the ECGBB.	Strongly Agree	26	23	
		Agree	63	57	
		Disagree	8	7	
		Strongly Disagree	1	1	
		Don't Know	13	12	
Total			111	100	

Question 20

My establishment's annual financial statements are analysed bi-annually by the ECGBB

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
20	My establishment's annual financial statements are analysed bi-annually by the ECGBB.	Strongly Agree	24	22	
		Agree	59	53	
		Disagree	7	6	
		Strongly Disagree	0	0	
		Don't Know	21	19	
Total			111	100	

Question 21

All audits are conducted in a professional manner

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
21	All audits are conducted in a professional manner.	Strongly Agree	31	28	
		Agree	71	64	
		Disagree	2	2	
		Strongly Disagree	0	0	
		Don't Know	7	6	
Total			111	100	

Question 22

The audits are conducted in a way that does not interfere with the daily operations of my establishment

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
22	The audits are conducted in a way that does not interfere with the daily operations of my establishment.	Strongly Agree	27	24	
		Agree	75	68	
		Disagree	6	5	
		Strongly Disagree	0	0	
		Don't Know	3	3	
Total			111	100	

Question 23

The persons conducting the audits demonstrate a clear understanding of the industry, the operational processes and the restrictions placed on my establishment

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
23	The persons conducting the audits demonstrate a clear understanding of the industry, the operational processes and the restrictions placed on my establishment.	Strongly Agree	18	16	
		Agree	83	75	
		Disagree	7	6	
		Strongly Disagree	0	0	
		Don't Know	3	3	
Total			111	100	

Question 24

Results of audits are communicated back to my establishment

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
24	Results of audits are communicated back to my establishment.	Strongly Agree	31	28	
		Agree	68	61	
		Disagree	7	6	
		Strongly Disagree	0	0	
		Don't Know	5	5	
Total			111	100	

Question 25

The ECGBB's List of Excluded Persons is updated regularly

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
25	The ECGBB's List of Excluded Persons is updated regularly.	Strongly Agree	22	20	
		Agree	51	46	
		Disagree	6	5	
		Strongly Disagree	6	5	
		Don't Know	26	23	
Total			111	100	

Question 26

The current exclusion process is effectively implemented

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
26	The current exclusion process is effectively implemented.	Strongly Agree	21	19	
		Agree	58	52	
		Disagree	6	5	
		Strongly Disagree	6	5	
		Don't Know	20	18	
Total			111	100	

Question 27

ECGGB inspects licence holders in an effective manner

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
27	ECGGB inspects licence holders in an effective manner.	Strongly Agree	34	31	
		Agree	72	65	
		Disagree	1	1	
		Strongly Disagree	0	0	
		Don't Know	4	4	
Total			111	100	

Question 28

The actions taken by the ECGGB identify and combat illegal gaming effectively

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
28	The actions taken by the ECGGB identify and combat illegal gaming effectively .	Strongly Agree	20	18	
		Agree	64	58	
		Disagree	5	5	
		Strongly Disagree	0	0	
		Don't Know	22	20	
Total			111	100	

Question 29

The process to report illegal gambling sites to the ECGGB is user-friendly and has been communicated extensively

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
29	The process to report illegal gambling sites to the ECGGB is user-friendly and has been communicated extensively.	Strongly Agree	15	14	
		Agree	40	36	
		Disagree	18	16	
		Strongly Disagree	2	2	
		Don't Know	36	32	
Total			111	100	

Question 30

The ECGGB responds promptly and decisively to reports of illegal gambling

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
30	The ECGBB responds promptly and decisively to reports of illegal gambling .	Strongly Agree	13	12	
		Agree	37	33	
		Disagree	19	17	
		Strongly Disagree	1	1	
		Don't Know	41	37	
Total			111	100	

Question 31

The actions taken against illegal gambling are communicated regularly to stakeholders

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
31	The actions taken against illegal gambling are communicated regularly to stakeholders.	Strongly Agree	13	12	
		Agree	42	38	
		Disagree	18	16	
		Strongly Disagree	0	0	
		Don't Know	38	34	
Total			111	100	

Question 32

The public awareness campaign driven by the ECGBB is addressing illegal gambling and its consequences effectively

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
32	The public awareness campaign driven by the ECGBB is addressing illegal gambling and its consequences effectively.	Strongly Agree	14	13	
		Agree	50	45	
		Disagree	12	11	
		Strongly Disagree	0	0	
		Don't Know	35	32	
Total			111	100	

Question 33

The Gambling Consumer Protection Strategy adopted by the ECGBB has been communicated adequately

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
33	The Gambling Consumer Protection Strategy adopted by the ECGBB has been communicated adequately.	Strongly Agree	17	15	
		Agree	33	30	
		Disagree	11	10	
		Strongly Disagree	0	0	
		Don't Know	50	45	
Total			111	100	

Question 34

ECGBB conducts research into the impact of gambling in the Eastern Cape in terms of the Gambling Consumer Protection Strategy

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
34	ECGGB conducts research into the impact of gambling in the Eastern Cape in terms of the Gambling Consumer Protection Strategy.	Strongly Agree	11	10	
		Agree	35	32	
		Disagree	4	4	
		Strongly Disagree	0	0	
		Don't Know	61	55	
Total			111	100	

Question 35

Results of the research are communicated to interested parties

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
35	Results of the research are communicated to interested parties.	Strongly Agree	9	8	
		Agree	28	25	
		Disagree	10	9	
		Strongly Disagree	5	5	
		Don't Know	59	53	
Total			111	100	

Question 36

The declaration of September as the "Responsible Gambling Month" has heightened awareness

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
36	The declaration of September as the "Responsible Gambling Month" has heightened awareness.	Strongly Agree	7	6	
		Agree	31	28	
		Disagree	18	16	
		Strongly Disagree	7	6	
		Don't Know	48	43	
Total			111	100	

Question 37

The Responsible Gambling programme conducted by the ECGGB educates the public adequately

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
37	The Responsible Gambling programme conducted by the ECGGB educates the public adequately.	Strongly Agree	11	10	
		Agree	50	45	
		Disagree	17	15	
		Strongly Disagree	0	0	
		Don't Know	33	30	
Total			111	100	

Question 38

The introduction of the NRGF toll-free helpline has enhanced the Responsible Gambling programme

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
38	The introduction of the NRGP toll-free helpline has enhanced the Responsible Gambling programme.	Strongly Agree	18	16	
		Agree	74	67	
		Disagree	3	3	
		Strongly Disagree	0	0	
		Don't Know	16	14	
Total			111	100	

Question 39

A provincially-based help programme will be more effective to address problem gambling

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
39	A provincially-based help programme will be more effective to address problem gambling.	Strongly Agree	19	17	
		Agree	47	42	
		Disagree	19	17	
		Strongly Disagree	8	7	
		Don't Know	18	16	
Total			111	100	

Question 40

My establishment receives regular updates/feedback from the ECGBB

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
40	My establishment receives regular updates/feedback from the ECGBB.	Strongly Agree	17	15	
		Agree	67	60	
		Disagree	24	22	
		Strongly Disagree	0	0	
		Don't Know	3	3	
Total			111	100	

Question 41

The current channels of communication used by the ECGBB are effective

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
41	The current channels of communication used by the ECGBB are effective.	Strongly Agree	20	18	
		Agree	74	67	
		Disagree	15	14	
		Strongly Disagree	0	0	
		Don't Know	2	2	
Total			111	100	

Question 42

The strategic imperatives of the ECGBB are communicated clearly

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Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
42	The strategic imperatives of the ECGBB are communicated clearly.	Strongly Agree	18	16	
		Agree	57	51	
		Disagree	28	25	
		Strongly Disagree	0	0	
		Don't Know	8	7	
Total			111	100	

Question 43

The ECGBB responds to our concerns timeously

Question number	Question	Answer option	Number of responses per answer option	Percentage	Depiction
43	The ECGBB responds to our concerns timeously.	Strongly Agree	17	15	
		Agree	75	68	
		Disagree	13	12	
		Strongly Disagree	1	1	
		Don't Know	5	5	
Total			111	100	