



GAMING INDUSTRY STATISTICS - QUARTERLY HIGHLIGHTS

Q2 2021 – JULY TO SEPT 2021

QUARTERLY GAMING INDUSTRY HIGHLIGHTS

Reporting Period: 2ND Quarter July to September 2021

This document provides an overview, key highlights and statistics for Jamaica's gaming industry for the quarter of July - September 2021.

Information presented is by sector, which includes data reported by operators licensed and regulated by the Betting Gaming and Lotteries Commission.

Betting includes bookmaking and pari-mutual wagering on horseracing (local and simulcast) and sports betting inclusive, of online casino and poker games.

Lottery comprises sales of lottery games classified as declared lottery, daily numbers game or instant lottery.

Gaming includes gaming machines (slots and locally-made gaming machines) and technical service providers.

Data presented is correct at the time of publication. However, may be adjusted without notice.

2021 | Second Quarter INDUSTRY PERFORMANCE – SALES

Total industry sales amounted to J\$36.514 billion in Q2 July 2021 to September 2021. This represented a 9.2% increase compared to the July – September 2020 quarter.

On a consecutive basis, Q2 sales decreased by 9% when compared to Q1 2021 impacted by:

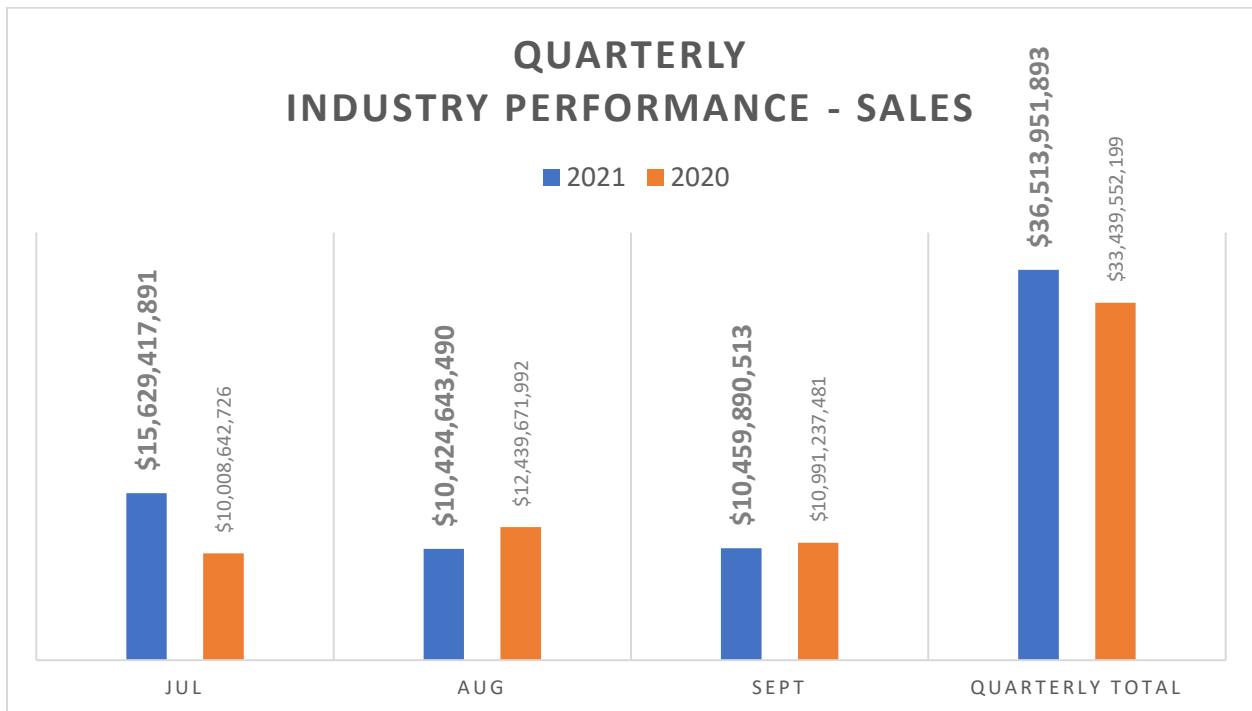
- the Government COVID-19 restrictions, primarily no movement days in August and September 2021

Sales decreased in the following sectors:

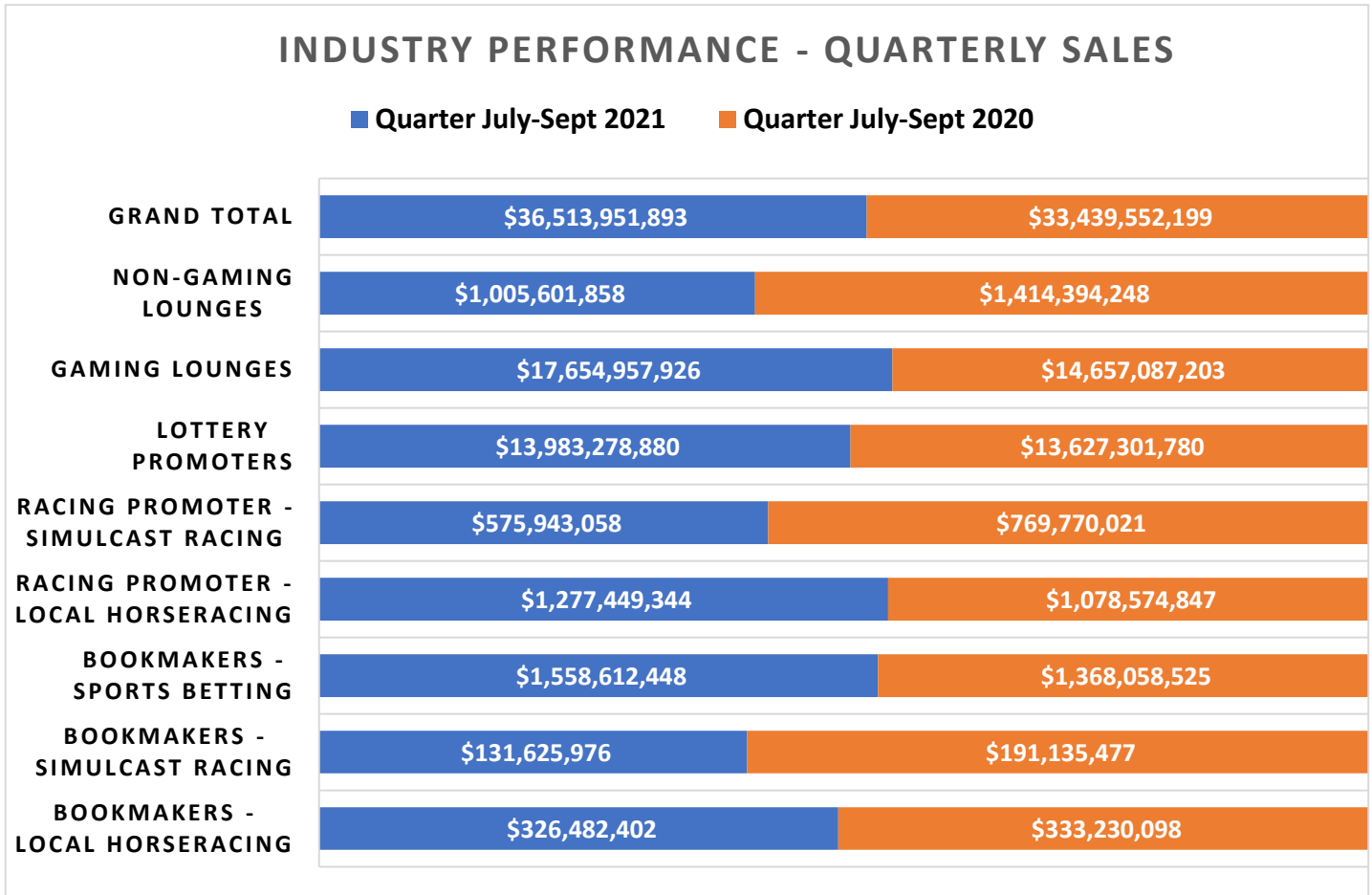
- Bookmakers: local horseracing (-2%), simulcast horseracing (-28%), & Sports betting (-9%)
- Racing Promoter: simulcast horseracing (-15%)
- Lottery (-3%)
- Gaming: non-gaming lounges (operators with 19 and under gaming machines) (-34.5%).
- Gaming: gaming lounges (-3%).

Despite continued restrictions, sales increased in the following:

- Racing Promoter: local horseracing (4%)



2021 | Second Quarter INDUSTRY PERFORMANCE – SALES (CONT'D)



2021 | Second Quarter INDUSTRY PERFORMANCE – SALES (CONT'D)

INDUSTRY PERFORMANCE - COMPARATIVE QUARTERLY SALES Q1 (UPDATED) AND Q2 2021

■ Quarter Jul-Sept 2021 ■ Quarter Apr-Jun 2021

GRAND TOTAL	\$36,513,951,893	\$40,215,196,390
NON-GAMING LOUNGES	\$1,005,601,858	1,535,920,441
GAMING LOUNGES	\$17,654,957,926	18,109,070,719
LOTTERY PROMOTERS	\$13,983,278,880	16,446,381,930
RACING PROMOTER - SIMULCAST RACING	\$575,943,058	658,442,223
RACING PROMOTER - LOCAL HORSERACING	\$1,277,449,344	1,228,649,151
BOOKMAKERS - SPORTS BETTING	\$1,558,612,448	1,719,863,157
BOOKMAKERS - SIMULCAST RACING	\$131,625,976	183,668,333
BOOKMAKERS - LOCAL HORSERACING	\$326,482,402	333,200,434

	2021			2020		
	SALES	PAYOUT	GROSS PROFIT	SALES	PAYOUT	GROSS PROFIT
APR	11,923,274,071	9,769,576,695	2,153,697,376	3,465,130,135	2,431,840,139	1,033,289,995
MAY	13,956,823,098	11,549,224,873	2,407,598,225	4,464,177,993	3,037,654,452	1,426,523,540
JUN	14,335,099,221	12,229,922,833	2,105,176,388	5,221,894,479	3,611,882,371	1,610,012,109
Q1 2021	40,215,196,390	33,548,724,401	6,666,471,989	13,151,202,607	9,081,376,962	4,069,825,644
JUL	15,629,417,891	13,193,198,214	2,436,219,677	10,008,642,726	8,043,501,148	1,965,141,578
AUG	10,424,643,490	8,761,576,624	1,663,066,866	12,439,671,992	10,327,609,755	2,112,062,237
SEPT	10,459,890,513	9,210,572,420	1,249,318,093	10,991,237,481	9,083,659,201	1,907,578,279
Q2 2021	36,513,951,893	31,165,347,258	5,348,604,635	33,439,552,199	27,454,770,104	5,984,782,095

2021 | Second Quarter

INDUSTRY PERFORMANCE – SALES (CONT'D)

July - Sept 2021	Sales \$	Payout/Prize Liability \$	Declared Gross Profit \$
Bookmakers			
Local Horseracing	326,482,402	210,421,303	116,061,099
Simulcast racing	131,625,976	86,733,895	44,892,082
Sports betting	1,558,612,448	1,307,377,033	251,235,416
Sub-total	2,016,720,827	1,604,532,231	412,188,596
Racing Promoter			
Local Horseracing	1,277,449,344	1,082,666,922	194,782,422
Simulcast racing	575,943,058	384,093,713	191,849,346
Sub-total	1,853,392,403	1,466,760,635	386,631,768
TOTAL - BETTING	3,870,113,229	3,071,292,865	798,820,364
LOTTERY	13,983,278,880	10,185,267,204	3,798,011,676
GAMING			
Gaming Lounges	17,654,957,926	16,950,958,029	703,999,896
Non-gaming lounges	1,005,601,858	957,829,159	47,772,699
Sub-total	18,660,559,784	17,908,787,189	751,772,595
GRAND TOTAL	36,513,951,893	31,165,347,258	5,348,604,635

July - Sept 2020	Sales \$	Payout/Prize Liability \$	Declared Gross Profit \$
Bookmakers			
Local Horseracing	333,230,098	207,634,106	125,595,992
Simulcast racing	191,135,477	130,466,954	60,668,523
Sports betting	1,368,058,525	1,216,765,768	151,292,757
Sub-total	1,892,424,100	1,554,866,829	337,557,272
Racing Promoter			
Local Horseracing	1,078,574,847	924,909,839	153,665,008
Simulcast racing	769,770,021	482,349,178	287,420,843
Sub-total	1,848,344,868	1,407,259,017	441,085,850
TOTAL - BETTING	3,740,768,968	2,962,125,846	778,643,122
LOTTERY	13,627,301,780	9,122,376,191	4,504,925,589
GAMING			
Gaming Lounges	14,657,087,203	14,025,559,774	631,527,429
Non-gaming lounges	1,414,394,248	1,344,708,292	69,685,955
Sub-total	16,071,481,451	15,370,268,066	701,213,384
GRAND TOTAL	33,439,552,199	27,454,770,104	5,984,782,095

2021 | Second Quarter

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE

Total Government Revenue for the industry was \$1.98 billion, a 1% decrease over the comparative quarter 2020. The Lottery Sector generated the highest industry sales and is the largest contributor to Government revenue which represents 92% in 2021 and 91% in the 2020 quarter.

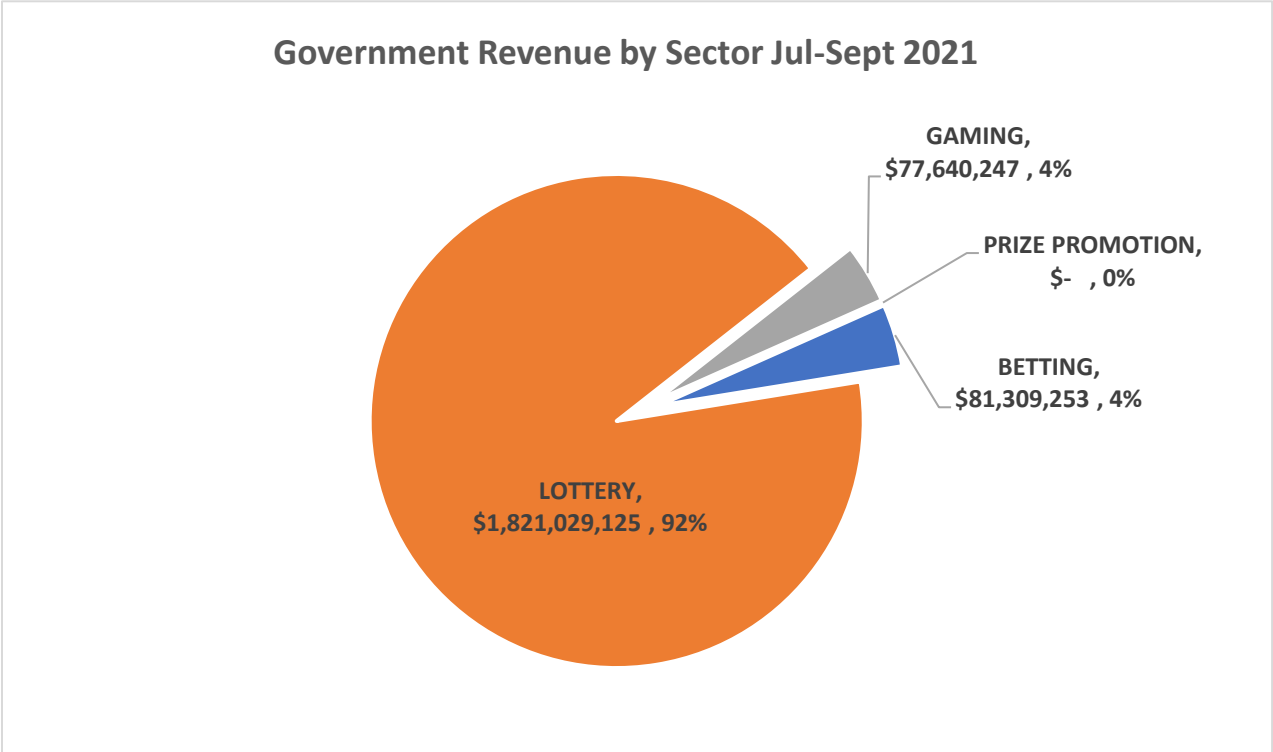
On a consecutive basis, Q2 2021 revenue decreased by 10.3% over Q1 2021 and was impacted by no-movement days and curfew measures during the period August – September 2021. Government revenue generated by Bookmakers was significantly impacted by the no-movement days and recorded a reduction in revenue from local horseracing (-7.3%), simulcast horseracing (-22.7%) and sports betting (-28.4%).

The Racing Promoter, Supreme Ventures Racing and Entertainment Limited (SVREL) generated marginal increase in Government revenue (local horseracing, 7.6% and simulcast horseracing, 0.2%).

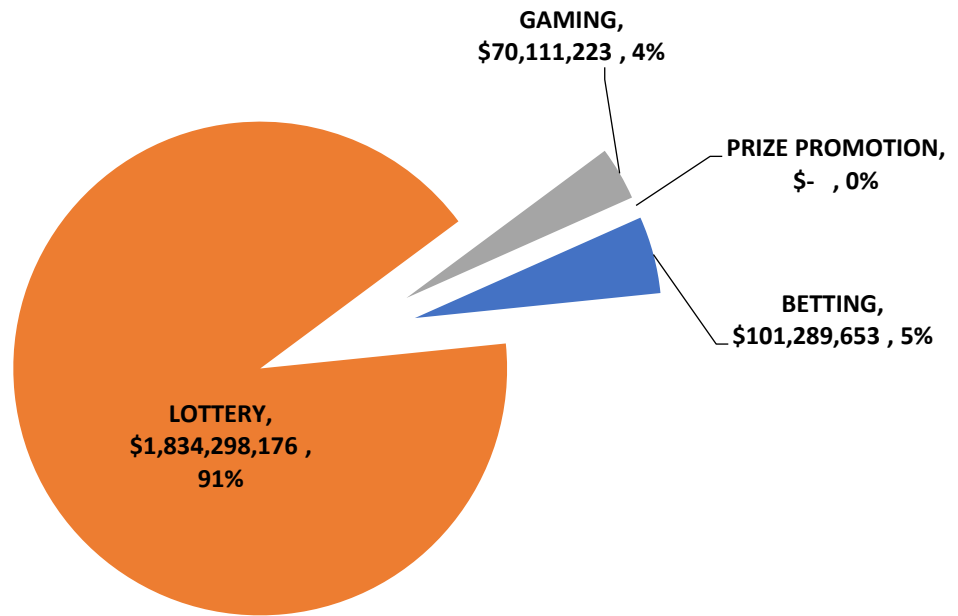
Revenue from the gaming sector marginally increased by 0.7%. Revenue from Gaming lounges decreased by 0.4% while revenue from non-gaming lounges increased by 18.2%. 81 slot machines were commissioned and operated in non-gaming lounges during the quarter in eight (8) parishes, mainly Kingston and St. Andrew, St. Catherine, St. James, Westmoreland, Trelawny and St. Ann.

Government revenue generated in the lottery sector decreased by 11%. Ticket sales decreased in August 2021 for all lottery games primarily due to the no-movement days and curfew restrictions. In September 2021, all lottery games decreased except for Cash Pot, Dollaz, Money Time, Hot Pick and Dream 6.

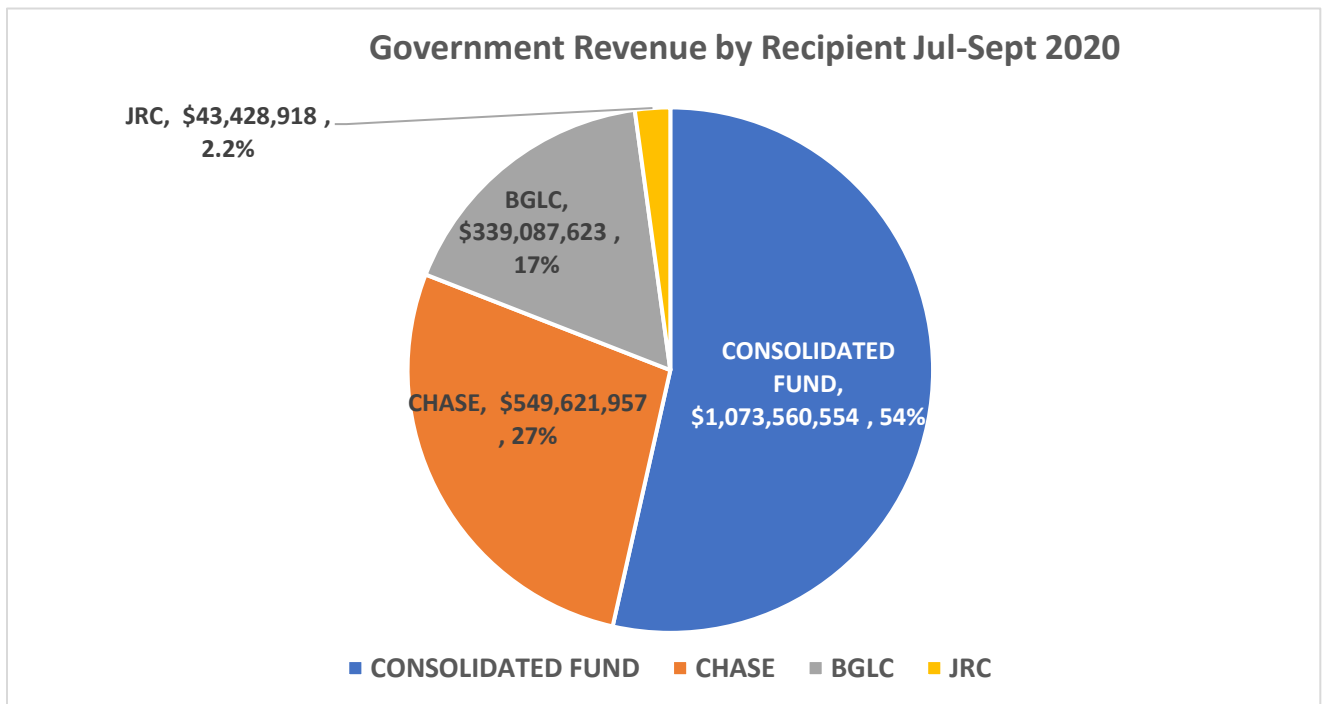
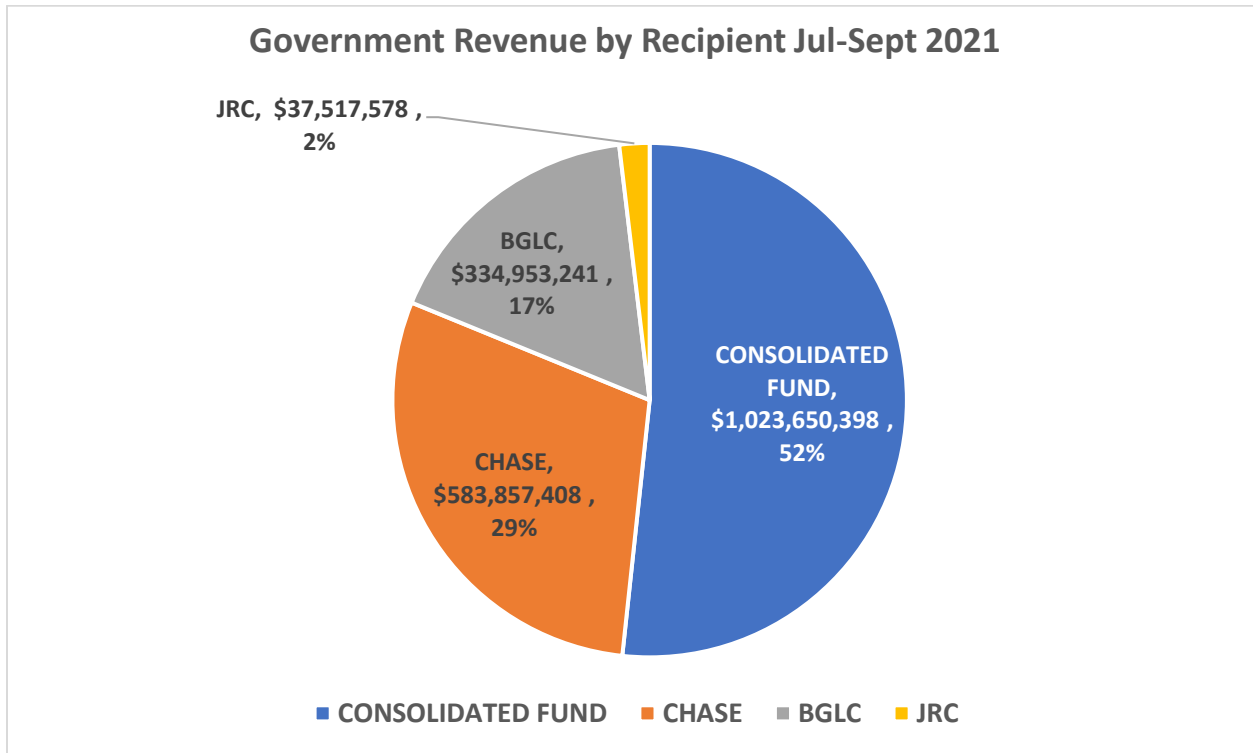
INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)



Government Revenue by Sector Jul-Sept 2020



INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)



INDUSTRY PERFORMANCE

GOVERNMENT REVENUE (CONT'D)

JULY - SEPT 2021	CONSOLIDATED FUND			BGLC	JRC	TOTAL July to Sept 2021
	TAJ	CHASE	TOTAL			
BETTING SECTOR						
<u>Bookmakers Levy</u>						
Local Horseracing	1,745,477	-	1,745,477	2,901,528	14,507,639	19,154,643
Simulcast racing	673,381	-	673,381	1,122,302	5,611,510	7,407,194
Sports betting	17,578,043	2,511,149	20,089,192	2,511,149	-	22,600,341
Unclaimed Winnings	-	-	-	3,261,143	-	3,261,143
Bookmakers' License Fees	-	-	-	-	-	-
SUB-TOTAL	19,996,901	2,511,149	22,508,050	9,796,122	20,119,149	52,423,321
<u>Racing Promoter Pool Betting Duty</u>						
Racing Promoter's License Fees	-	-	-	-	-	-
Local Horseracing	3,895,648	-	3,895,648	1,836,374	8,765,209	14,497,231
Simulcast racing	3,836,987	-	3,836,987	1,918,493	8,633,221	14,388,701
Unclaimed Winnings	-	-	-	-	-	-
SUB-TOTAL	7,732,635	-	7,732,635	3,754,867	17,398,430	28,885,932
TOTAL BETTING	27,729,536	2,511,149	30,240,685	13,550,989	37,517,578	81,309,253
LOTTERY SECTOR						
Lottery Tax	835,491,547	508,906,776	1,344,398,323	235,825,217	-	1,580,223,541
Lottery Winnings Levy	111,006,809	-	111,006,809	-	-	111,006,809
Unclaimed Winnings	-	64,840,803	64,840,803	64,957,972	-	129,798,775
Lottery Licence Fees	-	-	-	-	-	-
TOTAL LOTTERY	946,498,356	573,747,579	1,520,245,935	300,783,190	-	1,821,029,125
GAMING SECTOR						
Gaming Lounges	45,759,993	7,039,999	52,799,992	19,241,432	-	72,041,424
Non-gaming lounges	3,662,512	558,681	4,221,193	1,377,630	-	5,598,823
Licence fees	-	0	0	-	-	0
Technical Service Provider	-	-	-	-	-	-
TOTAL GAMING	49,422,505	7,598,680	57,021,185	20,619,062	-	77,640,247
Prize Competition	-	-	-	-	-	0
Charitable Bingo Licence Fees	0	-	-	-	-	0
INDUSTRY TOTAL	1,023,650,398	583,857,408	1,607,507,806	334,953,241	37,517,578	1,979,978,625

JULY - SEPT 2020	CONSOLIDATED FUND			BGLC	JRC	TOTAL July to Sept 2020
	TAJ	CHASE	TOTAL			
BETTING SECTOR						
Bookmakers Levy						
Local Horseracing	1,895,539	-	1,895,539	3,149,098	15,745,488	20,790,124
Simulcast racing	940,148	-	940,148	1,566,913	7,834,567	10,341,628
Sports betting	11,795,024	1,685,003	13,480,028	1,685,003	-	15,165,031
Unclaimed Winnings	-	-	0	4,411,431	-	4,411,431
Bookmakers' License Fees	-	-	0	0	-	0
SUB-TOTAL	14,630,711	1,685,003	16,315,715	10,812,445	23,580,055	50,708,215
Racing Promoter Pool Betting Duty						
Racing Promoter's License Fees	-	-	0	0	0	0
Local Horseracing	3,073,300	-	3,073,300	1,536,650	6,914,925	11,524,875
Simulcast racing	5,748,417	-	5,748,417	2,874,208	12,933,938	21,556,563
Unclaimed Winnings	-	-	0	17,500,000	-	17,500,000
SUB-TOTAL	8,821,717	-	8,821,717	21,910,859	19,848,863	50,581,439
TOTAL BETTING	23,452,428	1,685,003	25,137,432	32,723,304	43,428,918	101,289,653
LOTTERY SECTOR						
Lottery Tax	908,583,345	497,368,174	1,405,951,519	245,277,461	-	1,651,228,980
Lottery Winnings Levy	95,954,154	-	95,954,154	-	-	95,954,154
Unclaimed Winnings	-	43,557,521	43,557,521	43,557,521	-	87,115,042
Lottery Licence Fees	-	-	0	0	-	0
TOTAL LOTTERY	1,004,537,499	540,925,695	1,545,463,194	288,834,982	-	1,834,298,176
GAMING SECTOR						
Gaming Lounges	41,049,943	6,315,376	47,365,318	15,788,439	-	63,153,758
Non-gaming lounges	4,520,685	695,883	5,216,568	1,740,898	-	6,957,465
Licence fees	-	0	0	0	-	0
Technical Service Provider	0	0	0	0	-	0
TOTAL GAMING	45,570,628	7,011,258	52,581,886	17,529,337	0	70,111,223
Prize Competition	-	-	-	0	-	0
Charitable Bingo Licence Fees	0	0	0	0	0	0
INDUSTRY TOTAL	1,073,560,554	549,621,957	1,623,182,511	339,087,623	43,428,918	2,005,699,052