



GAMING INDUSTRY STATISTICS QUARTERLY HIGHLIGHTS

Q4 2021 – JAN TO MAR 2022

QUARTERLY GAMING INDUSTRY HIGHLIGHTS

Reporting Period: 4th Quarter January to March 2022

This document provides an overview, key highlights and statistics for Jamaica's gaming industry for the quarter of January – March 2022.

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 | Fourth Quarter INDUSTRY PERFORMANCE – SALES

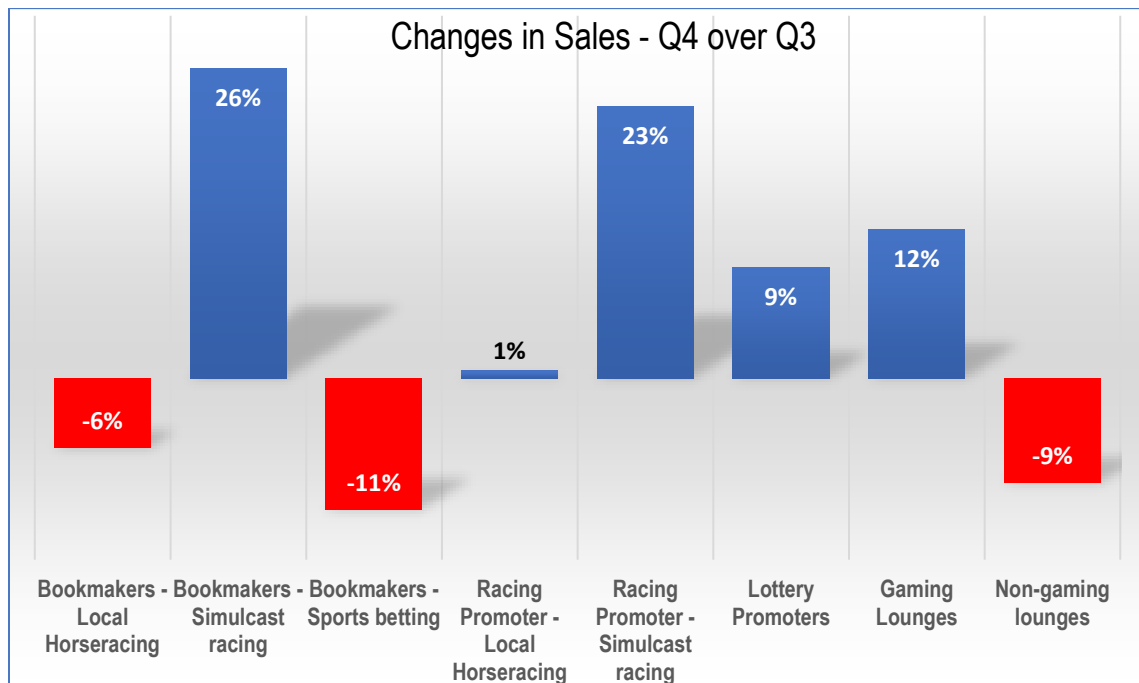
Total industry fourth quarter sales for January – March 2022 amounted to J\$53.164 billion and exceeded the previous quarter October to December 2021 by 7.52%. While sales decreased in local horseracing and sports betting for Bookmakers as well as in non-gaming lounges, increases in sales were seen in simulcast horseracing for bookmakers and the Racing Promoter, lottery promoters and gaming lounges. The performance of the industry was positively impacted by the relaxation of COVID-19 measures and reduced curfew hours.

Simulcast horseracing sales was generated by one (1) Bookmaker, Post to Post Betting Limited. Sales from sports betting were reported by three (3) Bookmakers: Prime Sports (Jamaica) Limited (55.4%), Post to Post Betting Limited (36.1%), and Island Sizzling Tech. Limited (8.5%).

Lottery sector recorded a 9% increase over the previous quarter.

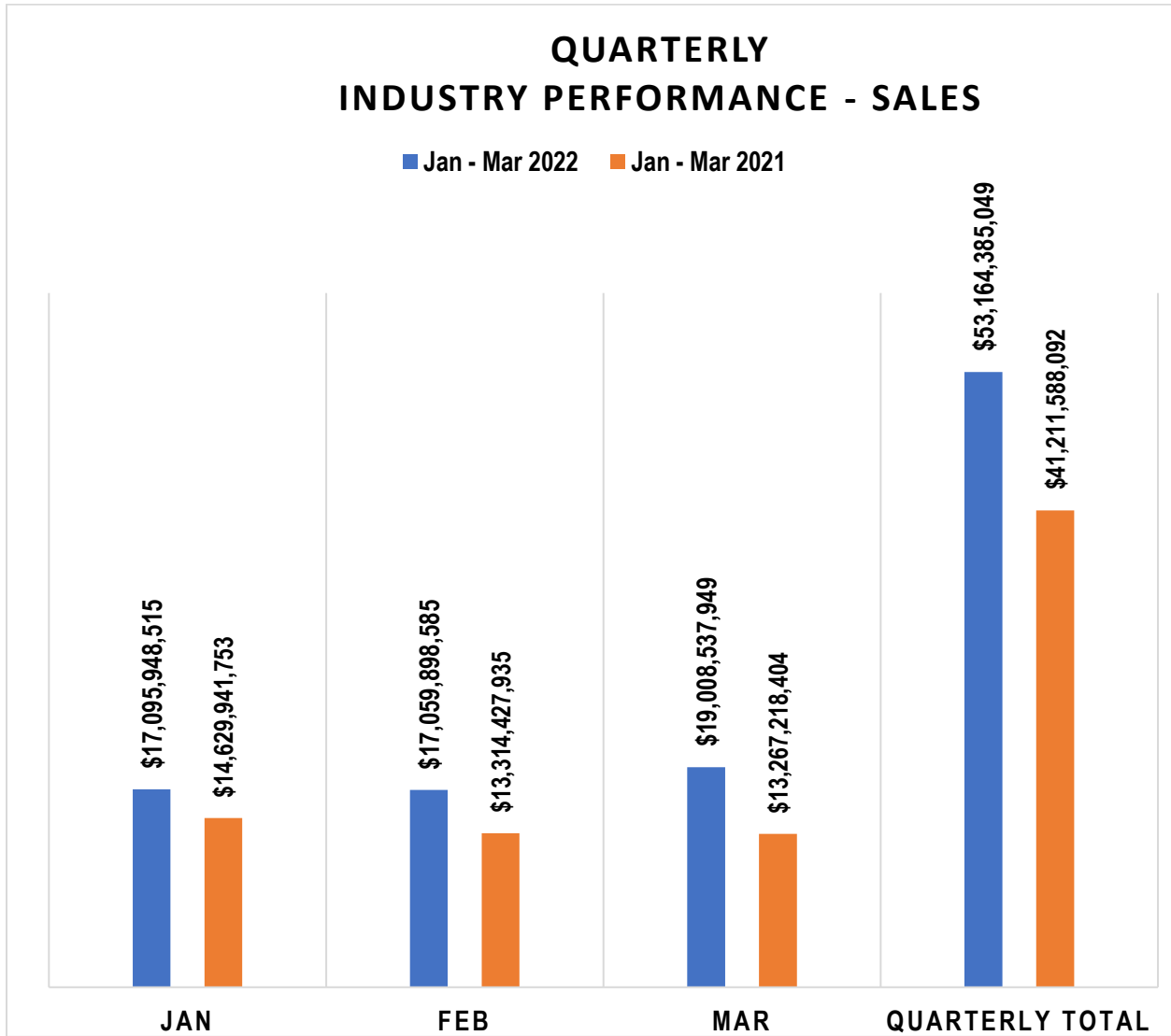
Gaming lounges in St. Andrew and St. James continues to generate 66% and 29% of total sales respectively for Q4 growing sales by 12% when compared to Q3. Gaming lounges and non-gaming lounges in hotels reflected decline in sales, except for one (1) gaming lounge in Trelawny. Despite this, the gaming sector has shown signs of steady recovery emanating from the tourism sector.

In the non-gaming lounge sector, PSJL-Ice Jamaica Limited generated 70% of the total sales in that category and was the main contributor for the 76% increase in sales.

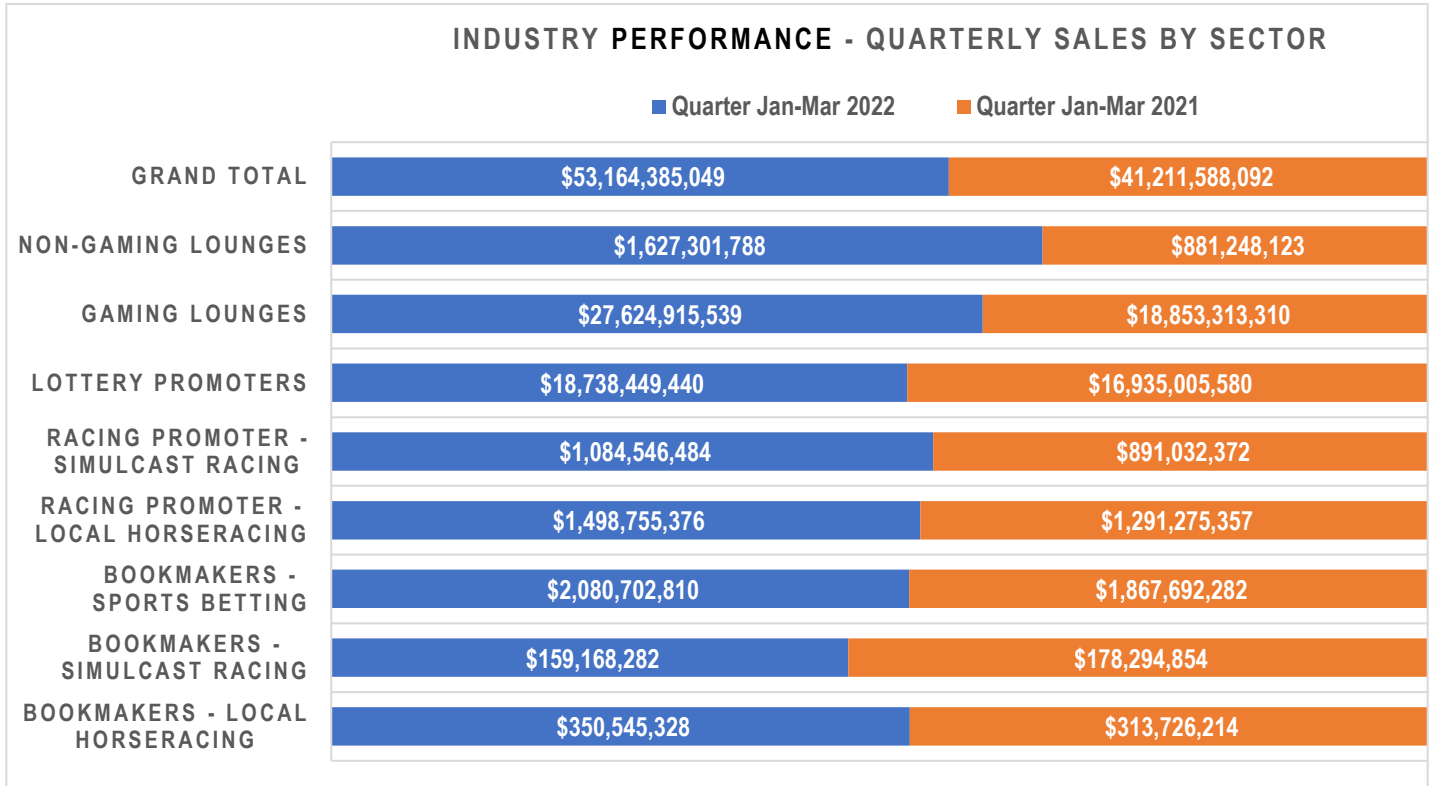


2021 | Fourth Quarter

INDUSTRY PERFORMANCE – SALES (CONT'D)



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



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

2021				2020			
	SALES	PAYOUT	GROSS PROFIT		SALES	PAYOUT	GROSS PROFIT
APR	11,923,274,071	9,769,576,695	2,153,697,376	APR	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	MAY	4,464,177,993	3,037,654,452	1,426,523,540
JUN (Restated)	14,335,099,221	12,229,922,833	2,105,176,388	JUN	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	Q1 2020	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	JUL	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	AUG	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	SEPT	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	Q2 2020	33,439,552,199	27,454,770,104	5,984,782,095
OCT	14,846,624,149	12,484,816,981	2,361,807,168	OCT	12,292,937,659	10,105,664,781	2,187,272,878
NOV	16,340,020,985	13,842,293,305	2,497,727,681	NOV	12,032,517,507	10,134,311,111	1,898,206,396
DEC	18,258,968,371	15,423,000,259	2,835,968,112	DEC	14,194,683,668	11,955,977,681	2,238,705,987
Q3 2021	49,445,613,506	41,750,110,545	7,695,502,961	Q3 2020	38,520,138,833	32,195,953,573	6,324,185,260
JAN	17,095,948,515	14,342,881,702	2,753,066,813	JAN	14,629,941,753	12,450,244,637	2,179,697,116
FEB	17,059,898,585	14,717,014,432	2,342,884,153	FEB	13,314,427,935	11,352,058,286	1,962,369,649
MAR	19,008,537,949	16,124,985,995	2,883,551,954	MAR	13,267,218,404	11,264,471,094	2,002,747,311
Q4 2022	53,164,385,049	45,184,882,128	7,979,502,921	Q4 2021	41,211,588,092	35,066,774,016	6,144,814,076

2021 | Fourth Quarter

INDUSTRY PERFORMANCE - SALES (CONT'D)

INDUSTRY PERFORMANCE - COMPARATIVE QUARTERLY SALES: Q3 VS Q4

■ Jan - Mar 2022 Sales \$ ■ Oct - Dec 2021 Sales \$

	Jan - Mar 2022 Sales \$	Oct - Dec 2021 Sales \$
GRAND TOTAL	53,164,385,049	49,445,613,506
SUB-TOTAL	29,252,217,328	27,073,797,000
NON-GAMING LOUNGES	1,627,301,788	2,225,885,905
GAMING LOUNGES	27,624,915,539	24,847,911,095
LOTTERY	18,738,449,440	17,163,599,324
TOTAL - BETTING	5,173,718,281	5,208,217,182
SUB-TOTAL	2,583,301,860	2,374,824,421
SIMULCAST RACING	1,084,546,484	885,200,122
LOCAL HORSERACING	1,498,755,376	1,489,624,299
SUB-TOTAL	2,590,416,421	2,833,392,760
SPORTS BETTING	2,080,702,810	2,334,780,429
SIMULCAST RACING	159,168,282	126,710,401
LOCAL HORSERACING	350,545,328	371,901,930

2021 | Fourth Quarter

INDUSTRY PERFORMANCE (CONT'D)

Jan - Mar 2022	Sales \$	Payout/Prize Liability \$	Declared Gross Profit \$
Bookmakers			
Local Horseracing	350,545,328	234,351,503	116,193,825
Simulcast racing	159,168,282	109,035,894	50,132,388
Sports betting	2,080,702,810	1,734,055,815	346,646,995
Sub-total	2,590,416,421	2,077,443,213	512,973,208
Racing Promoter			
Local Horseracing	1,498,755,376	1,235,304,911	263,450,465
Simulcast racing	1,084,546,484	722,994,584	361,551,900
Sub-total	2,583,301,860	1,958,299,495	625,002,365
TOTAL - BETTING	5,173,718,281	4,035,742,708	1,137,975,573
LOTTERY	18,738,449,440	13,097,399,476	5,641,049,964
GAMING			
Gaming Lounges	27,624,915,539	26,496,407,032	1,128,508,507
Non-gaming lounges	1,627,301,788	1,555,332,913	71,968,876
Sub-total	29,252,217,328	28,051,739,945	1,200,477,383
GRAND TOTAL	53,164,385,049	45,184,882,128	7,979,502,921

Jan - Mar 2021	Sales \$	Payout/Prize Liability \$	Declared Gross Profit \$
Bookmakers			
Local Horseracing	313,726,214	204,419,678	109,306,537
Simulcast racing	178,294,854	133,698,293	44,596,561
Sports betting	1,867,692,282	1,562,465,714	305,226,568
Sub-total	2,359,713,351	1,900,583,685	459,129,666
Racing Promoter			
Local Horseracing	1,291,275,357	1,073,459,600	217,815,758
Simulcast racing	891,032,372	558,005,848	333,026,523
Sub-total	2,182,307,729	1,631,465,448	550,842,281
TOTAL - BETTING	4,542,021,080	3,532,049,133	1,009,971,947
LOTTERY	16,935,005,580	12,605,645,923	4,329,359,657
GAMING			
Gaming Lounges	18,853,313,310	18,094,042,298	759,271,012
Non-gaming lounges	881,248,123	835,036,663	46,211,460
Sub-total	19,734,561,433	18,929,078,961	805,482,472
GRAND TOTAL	41,211,588,092	35,066,774,016	6,144,814,076

2021 | Fourth Quarter

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE

Government gains 20.4% in YTD revenue from gaming industry

SECTOR	Q4 2021 (\$)	Q4 2020 (\$M)	CHANGE OVER Q4 2020	YTD APR-MAR 2022 (\$M)	YTD APR-MAR 2021 (\$M)	CHANGE OVER YTD APR-MAR 2021
BETTING						
Bookmakers	61,534,679	53,427,121	15.2%	245,722,782	179,571,541	36.8%
Racing Promoter	53,815,622	51,313,171	4.9%	167,736,260	148,446,179	13.0%
Total Betting	115,350,301	104,740,292	10.1%	413,459,042	328,017,720	26.0%
LOTTERY						
	2,447,137,717	2,066,291,614	18.4%	8,971,046,986	7,499,566,006	19.6%
GAMING						
	120,018,464	80,671,486	48.8%	479,833,920	366,159,468	31.0%
PRIZE COMPETITION/BINGO						
				12,476,275	12,360,000	0.9%
TOTAL INDUSTRY GOVERNMENT REVENUE						
	2,682,506,482	2,251,703,392	19.1%	9,876,816,223	8,206,103,194	20.4%

Total Government Revenue from betting, lottery and gaming reached \$2.682 billion, growing 19.1% over the comparative quarter 4 2020 and 5.6% from the October - December 2021 quarter. All sectors contributed to the 20.4% increase in Year to date Government revenue.

Betting Sector

Simulcast horseracing rebounded in Q4 compared to Q3 with the streaming of races from host tracks on North America, Canada, UK and Irish. This resulted in increases in Q4 Government revenue by both Bookmakers (32.7%) and the Racing Promoter, Supreme Ventures Racing and Entertainment Limited (SVREL) (21.2%). Bookmakers reported decreases in local horseracing and sports betting by -14.8% and -9.3% respectively.

Government revenue from sports betting is primarily offered by Prime Sport (Jamaica) Limited (JustBet), Post to Post Betting Limited (Anybet) and Island Sizzling Tech. Jamaica Limited (Islandbet) through retail locations island-wide and online/mobile player accounts. Gaming consumers continued to shift to online player account wagering offered by both Just Bet and Islandbet before and during the pandemic.

For each successive quarter, JustBet promoted its JustBet mobile and online platform which resulted in JustBet contributing 66% to Government revenue while Anybet and Islandbet contributed 29% and 5% respectively. Anybet rolled out its online platform in 2021 but continues to offer its products through retail locations. This sector contributed 4% of total Government Revenue.

2021 | Fourth Quarter

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE Cont'd

Gaming Sector

Gaming continues to maintain steady growth for each successive quarter, with Government revenue from slot machines increasing by 48.8% over the comparative period in January – March 2021 and 0.8% over Q3 October – December 2021.

Revenue from Gaming lounges and non-gaming lounges increased by 7.8% and 7.5% respectively. Growth in revenue from gaming lounges was reported in all parishes except for St. Ann and Hanover. The gaming lounges in St. Ann and Hanover, where two are in a hotel was impacted by low cruise passenger arrivals, tourists and occupancy levels. ICE Jamaica Limited, contributed 70% of total revenue from the non-gaming lounges category.

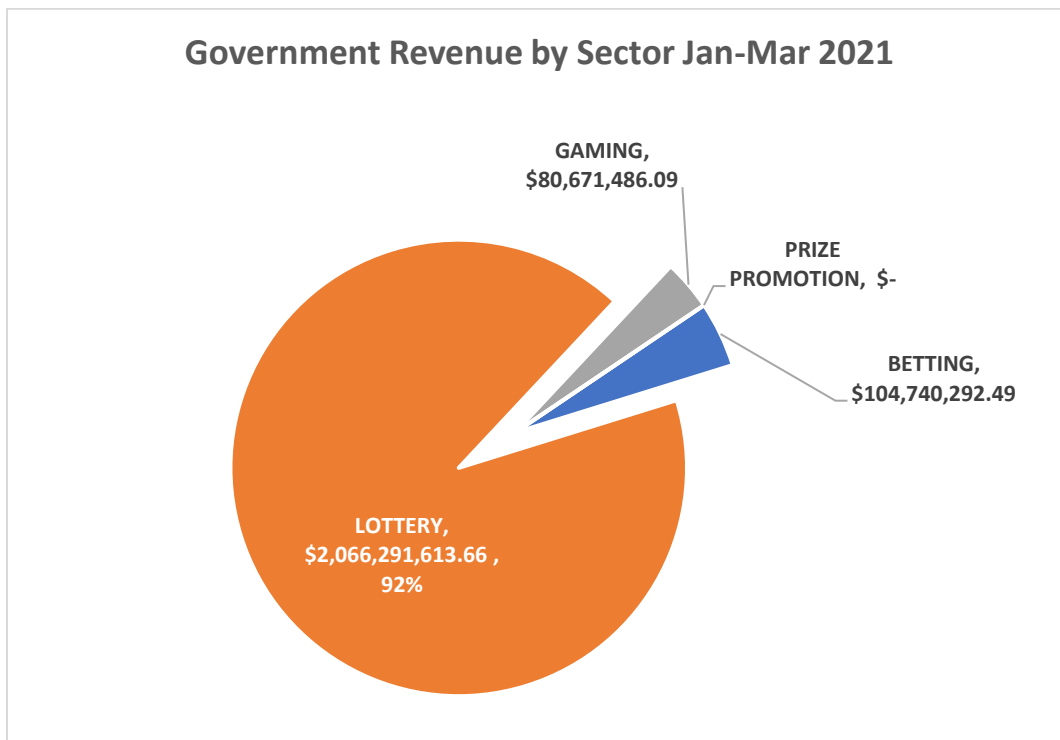
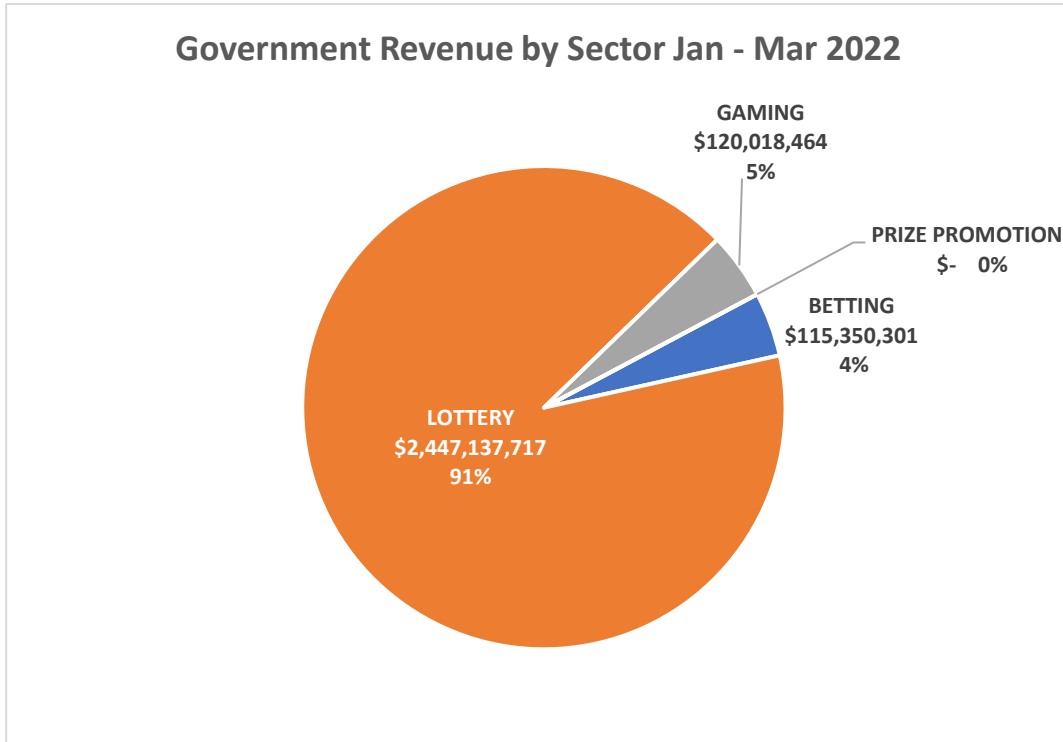
This sector contributes 5% of total Government Revenue.

Lottery Sector

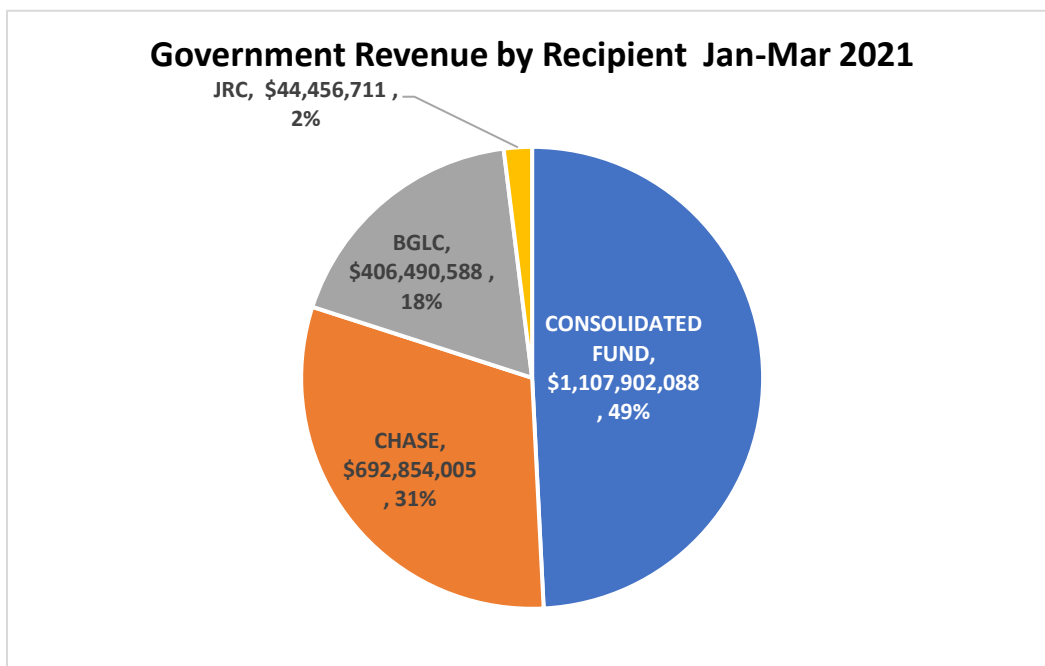
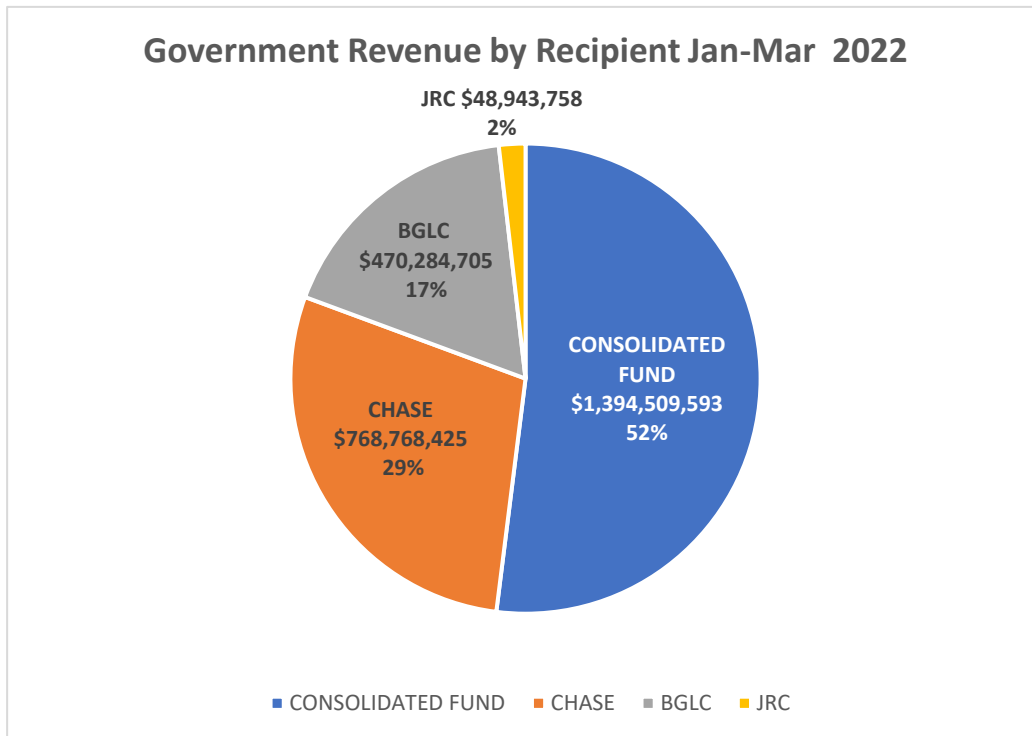
Government revenue from lottery continues to grow in the fourth quarter expanding by 6.1% over Q3 2021. Gaming consumers' wagers generated \$18.7 billion in sales (9% increase over Q3 October – December 2021) with payout of \$13 billion. Comparison of Q4 over Q3 showed increases in Lottery taxes and Contributions to the Government by 8.3% and Unclaimed winnings by 28.6%. The revenue from lottery is driven by marketing and product enhancements as well as channel expansion by the three (3) Lottery Promoters.

This sector contributes 91% of total Government revenue.

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)



INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)



INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

JANUARY - MARCH 2022	CONSOLIDATED FUND			BGLC	JRC	TOTAL January to March 2022
	TAJ	CHASE	TOTAL			
BETTING SECTOR						
<u>Bookmakers Levy</u>						
Local Horseracing	1,751,292	-	1,751,292	2,910,421	14,552,103	19,213,816
Simulcast racing	751,986	-	751,986	1,253,310	6,266,548	8,271,844
Sports betting	24,376,666	3,482,381	27,859,047	3,482,381	-	31,341,428
Unclaimed Winnings	-	-	-	2,707,591	-	2,707,591
Bookmakers' License Fees	-	-	-	-	-	-
SUB-TOTAL	26,879,944	3,482,381	30,362,325	10,353,702	20,818,651	61,534,679
<u>Racing Promoter Pool Betting Duty</u>						
Racing Promoter's License Fees	-	-	-	-	-	-
Local Horseracing	5,269,009	-	5,269,009	2,634,505	11,855,271	19,758,785
Simulcast racing	7,231,038	-	7,231,038	3,615,519	16,269,836	27,116,393
Unclaimed Winnings	-	-	-	6,940,445	-	6,940,445
SUB-TOTAL	12,500,047	-	12,500,047	13,190,468	28,125,106	53,815,622
TOTAL BETTING	39,379,992	3,482,381	42,862,373	23,544,170	48,943,758	115,350,301
LOTTERY SECTOR						
Lottery Tax	1,120,089,112	683,019,741	1,803,108,852	346,097,564	-	2,149,206,417
Lottery Winnings Levy	157,038,747	-	157,038,747	-	-	157,038,747
Unclaimed Winnings	-	70,261,526	70,261,526	70,631,027	-	140,892,553
Lottery Licence Fees	-	-	-	-	-	-
TOTAL LOTTERY	1,277,127,859	753,281,267	2,030,409,126	416,728,591	-	2,447,137,717
GAMING SECTOR						
Gaming Lounges	73,353,053	11,285,085	84,638,138	28,212,713	-	112,850,851
Non-gaming lounges	4,648,690	719,692	5,368,382	1,799,231	-	7,167,613
Licence fees	-	0	0	-	-	0
Technical Service Provider	-	-	-	-	-	-
TOTAL GAMING	78,001,743	12,004,778	90,006,520	30,011,944	-	120,018,464
Prize Competition	-	-	-	-	-	0
Charitable Bingo Licence Fees	0	-	-	-	-	0
INDUSTRY TOTAL	1,394,509,593	768,768,425	2,163,278,019	470,284,705	48,943,758	2,682,506,482

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

JANUARY - MARCH 2021	CONSOLIDATED FUND			BGLC	JRC	TOTAL January to March 2021
	TAJ	CHASE	TOTAL			
BETTING SECTOR						
<i>Bookmakers Levy</i>						
Local Horseracing	1,667,775	-	1,667,775	2,769,358	13,846,788	18,283,920
Simulcast racing	698,643	-	698,643	1,164,404	5,822,021	7,685,068
Sports betting	21,356,326	3,050,904	24,407,230	3,050,904	-	27,458,134
Unclaimed Winnings	-	-	0	0	-	0
Bookmakers' License Fees	-	-	0	0	-	0
SUB-TOTAL	23,722,743	3,050,904	26,773,647	6,984,666	19,668,809	53,427,121
<i>Racing Promoter Pool Betting Duty</i>						
Racing Promoter's License Fees	-	-	0	0	3,806,000	0
Local Horseracing	4,356,315	-	4,356,315	2,178,158	9,801,709	16,336,182
Simulcast racing	6,660,530	-	6,660,530	3,330,265	14,986,194	24,976,989
Unclaimed Winnings	-	-	0	10,000,000	-	10,000,000
SUB-TOTAL	11,016,846	-	11,016,846	15,508,423	28,593,903	51,313,171
TOTAL BETTING	34,739,589	3,050,904	37,790,493	22,493,088	48,262,711	104,740,292
LOTTERY SECTOR						
Lottery Tax	879,368,488	627,223,010	1,506,591,498	309,315,099	-	1,815,906,597
Lottery Winnings Levy	141,361,246	-	141,361,246	-	-	141,361,246
Unclaimed Winnings	-	54,511,886	54,511,886	54,511,886	-	109,023,772
Lottery Licence Fees	-	-	0	0	-	0
TOTAL LOTTERY	1,020,729,734	681,734,895	1,702,464,629	363,826,984	-	2,066,291,614
GAMING SECTOR						
Gaming Lounges	49,387,366	7,598,056	56,985,422	18,995,141	-	75,980,562
Non-gaming lounges	3,045,400	470,150	3,515,549	1,175,374	-	4,690,924
Licence fees	0	0	0	0	-	0
Technical Service Provider	0	0	0	0	-	0
TOTAL GAMING	52,432,765	8,068,206	60,500,971	20,170,515	0	80,671,486
Prize Competition	-	-	-	0	-	0
Charitable Bingo Licence Fees	0	0	0	0	0	0
INDUSTRY TOTAL	1,107,902,088	692,854,005	1,800,756,093	406,490,588	48,262,711	2,251,703,392