



GAMING INDUSTRY STATISTICS - QUARTERLY HIGHLIGHTS

APRIL - JUNE 2021

QUARTERLY GAMING INDUSTRY HIGHLIGHTS

Reporting Period: April to June 2021 (Q1 F/Y 2021-2022)

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

INDUSTRY PERFORMANCE – SALES

Total industry sales amounted to J\$39.7 billion in Q1 F/Y2021: April - June 2021. This represents a 202.77% increase compared to the COVID-19 impact April – June 2020.

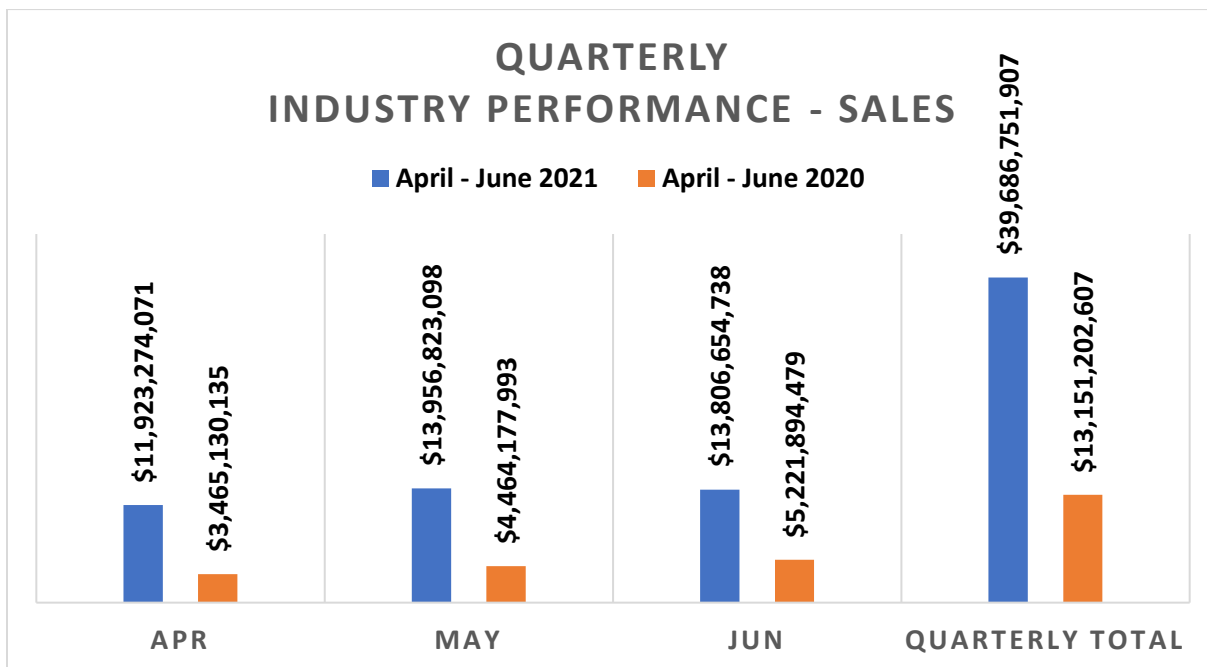
On a consecutive basis, Q1 sales decreased by 4% when compared to Q4 F/Y 2020: January – March 2021, impacted by the Government COVID-19 restrictions.

Sales decreased in the following sectors:

- Bookmakers: Sports betting (-8%)
- Racing Promoter: local horseracing (-15%) and simulcast horseracing (-40%)
- Lottery (-3%)
- Gaming: gaming lounges (4%).

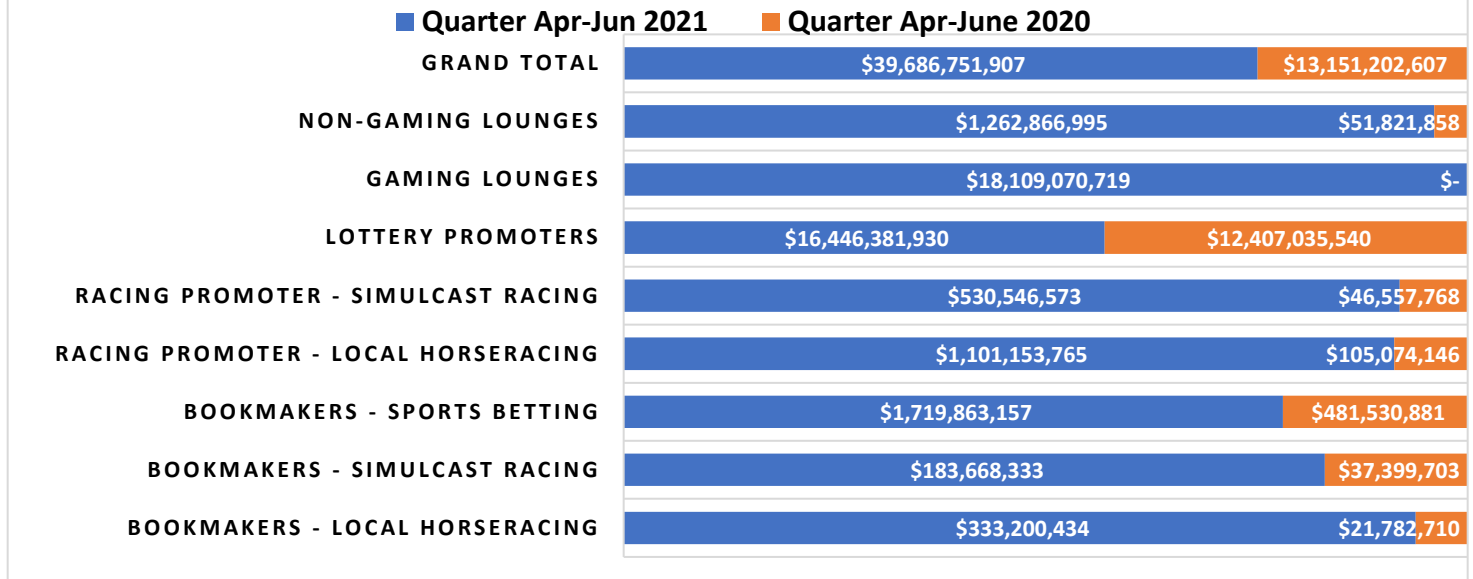
Despite continued restrictions, sales increased in the following:

- Bookmakers: local horseracing (6%) and simulcast horseracing (3%)
- Gaming: non-gaming lounges (operators with 19 and under gaming machines) (43%). A total of 45 slot machines in the parishes of St. Andrew, Montego Bay and Savanna La Mar resumed operations during Q1 April to June 2021.

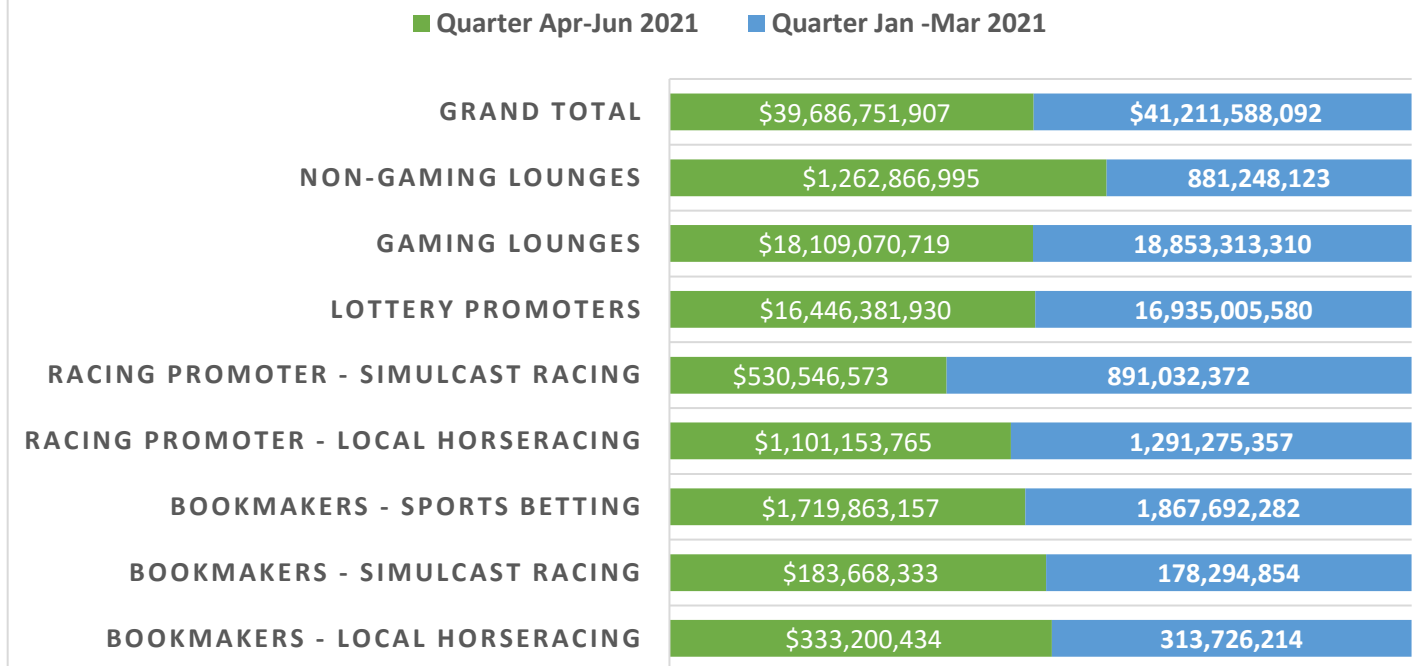


INDUSTRY PERFORMANCE – SALES (CONT'D)

INDUSTRY PERFORMANCE - QUARTERLY SALES



INDUSTRY PERFORMANCE - COMPARATIVE QUARTERLY SALES Q4 2020 AND Q1 2021



Q1 F/Y 2021 vs Q4 F/Y 2020 INDUSTRY PERFORMANCE – SALES (CONT'D)

	2021			2020		
	SALES	PAYOUT	GROSS PROFIT	SALES	PAYOUT	GROSS PROFIT
JAN	14,629,941,753	12,450,244,637	2,179,697,116	16,409,618,707	13,982,514,015	2,427,104,692
FEB	13,314,427,935	11,352,058,286	1,962,369,649	14,549,673,714	12,368,361,343	2,181,312,371
MAR	13,267,218,404	11,264,471,094	2,002,747,311	10,348,385,538	8,703,866,470	1,644,519,069
Q4 2020	41,211,588,092	35,066,774,016	6,144,814,076	41,307,677,959	35,054,741,827	6,252,936,132
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	13,806,654,738	11,775,701,331	2,030,953,407	5,221,894,479	3,611,882,371	1,610,012,109
Q1 2021	39,686,751,907	33,094,502,899	6,592,249,008	13,151,202,607	9,081,376,962	4,069,825,644

Q1 F/Y 2021 vs Q1 F/Y 2020 INDUSTRY PERFORMANCE – SALES (CONT'D)

April - June 2021	Sales	Payout/Prize Liability	Declared Gross Profit
	\$	\$	\$
Bookmakers			
Local Horseracing	333,200,434	208,009,180	125,191,255
Simulcast racing	183,668,333	123,022,381	60,645,952
Sports betting	1,719,863,157	1,418,246,907	301,616,250
Sub-total	2,236,731,925	1,749,278,468	487,453,456
Racing Promoter			
Local Horseracing	1,101,153,765	921,441,181	179,712,584
Simulcast racing	530,546,573	339,023,598	191,522,975
Sub-total	1,631,700,338	1,260,464,779	371,235,559
TOTAL - BETTING	3,868,432,263	3,009,743,247	858,689,016
LOTTERY	16,446,381,930	11,476,580,988	4,969,800,942
GAMING			
Gaming Lounges	18,109,070,719	17,385,741,497	723,329,222
Non-gaming lounges	1,262,866,995	1,222,437,167	40,429,828
Sub-total	19,371,937,715	18,608,178,664	763,759,051
GRAND TOTAL	39,686,751,907	33,094,502,899	6,592,249,008

April - June 2020	Sales	Payout/Prize Liability	Declared Gross Profit
	\$	\$	\$
Bookmakers			
Local Horseracing	21,782,710	15,035,948	6,746,762
Simulcast racing	37,399,703	32,461,163	4,938,540
Sports betting	481,530,881	406,314,295	75,216,586
Sub-total	540,713,294	453,811,406	86,901,888
Racing Promoter			
Local Horseracing	105,074,146	81,762,108	23,312,038
Simulcast racing	46,557,768	30,703,441	15,854,327
Sub-total	151,631,915	112,465,549	39,166,365
TOTAL - BETTING	692,345,209	566,276,955	126,068,254
LOTTERY	12,407,035,540	8,467,451,300	3,939,584,240
GAMING			
Gaming Lounges	0	0	0
Non-gaming lounges	51,821,858	47,648,707	4,173,151
Sub-total	51,821,858	47,648,707	4,173,151
GRAND TOTAL	13,151,202,607	9,081,376,962	4,069,825,644

Q1 F/Y 2021 vs Q1 F/Y 2020

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE

Total Government Revenue for the industry was \$2.2 billion, a 34.46% increase over the comparative quarter 2020. The Lottery sector generated the highest industry sales and is the largest contributor to Government revenue, representing 92% for Q1 F/Y 2021 vs. 99% for Q1 F/Y 2020.

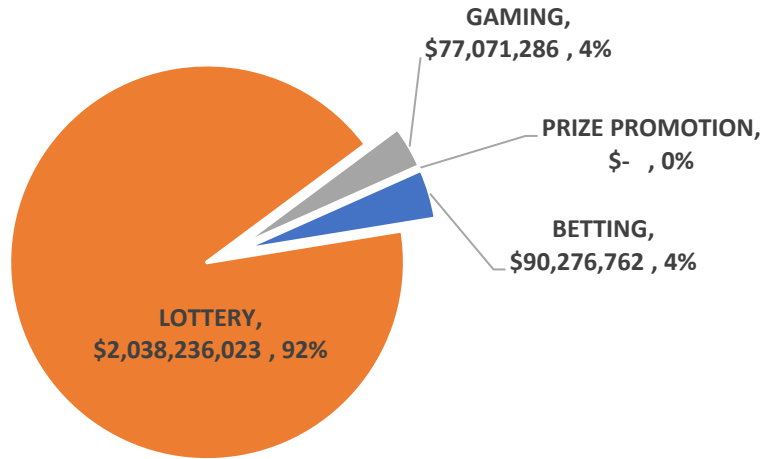
On a consecutive basis, Q1 F/Y 2021 revenue grew marginally by 0.17% over Q4 F/Y 2020 and was impacted by continued tighter weekend and holiday restrictions during the period April – May 2021.

Government revenue generated by the Racing Promoter, Supreme Ventures Racing and Entertainment Limited (SVREL) was significantly impacted by the curfew measures. Key race days traditionally held on Easter Monday and Labour Day were not held due to the restrictions. The Racing Promoter recorded decreases in local and simulcast horseracing of 17.5% and 42.5% respectively.

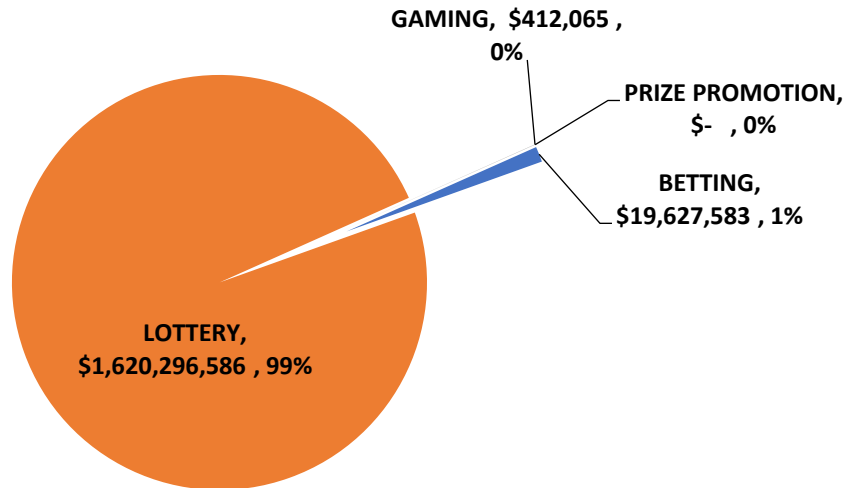
Revenue from the Gaming sector decreased by 4.5%, primarily gaming lounges.

Despite continued operating restrictions in Q1 F/Y 2021, Government revenue in the Lottery sector increased marginally by 1.3%. Ticket sales decreased in April and May 2021 but rebounded in June 2021, when compared to Q4 F/Y 2020.

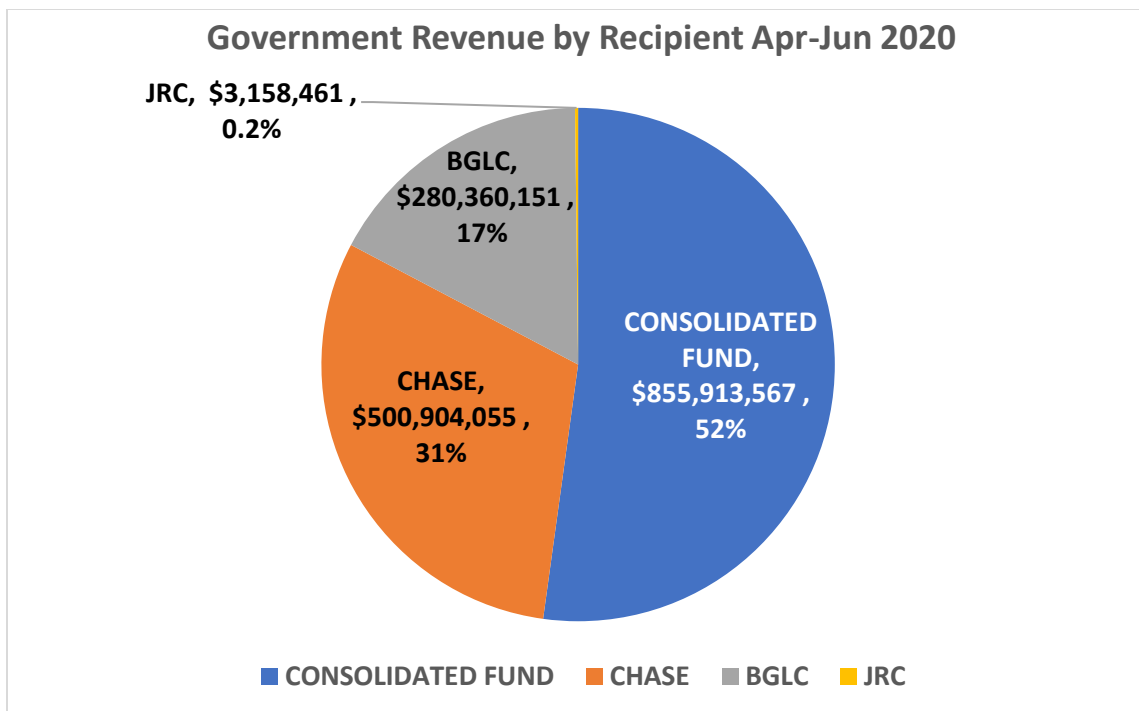
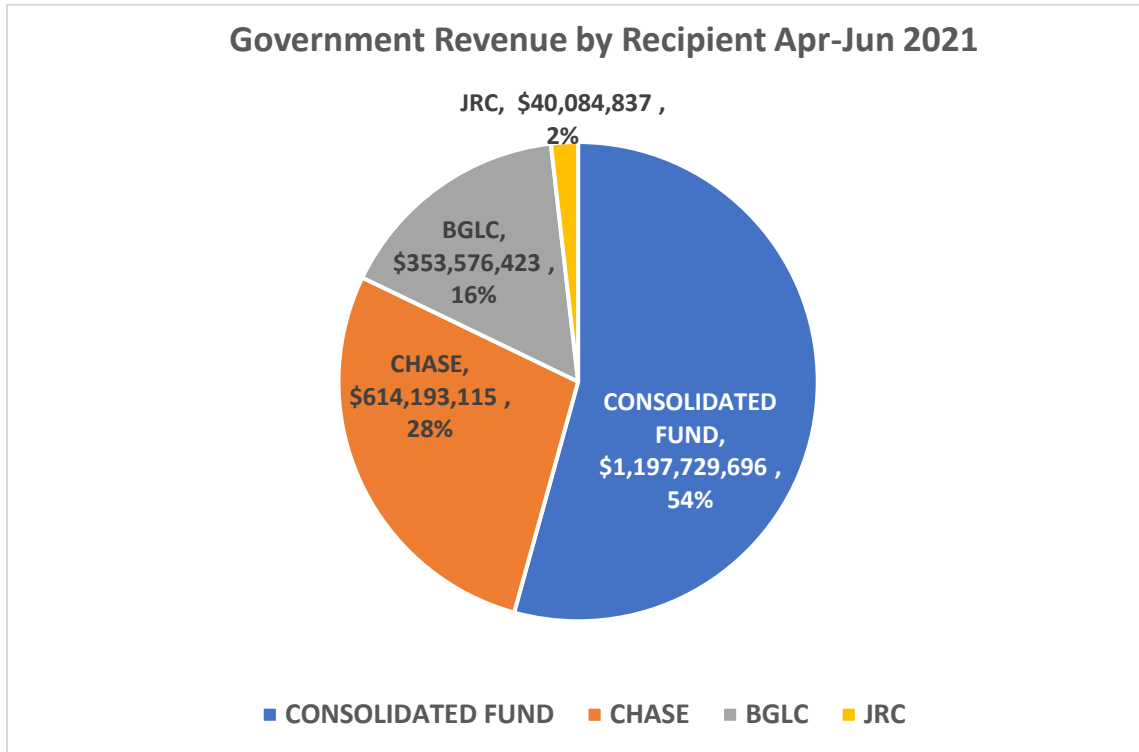
Government Revenue by Sector Apr-Jun 2021



Government Revenue by Sector Apr-Jun 2020



INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)



INDUSTRY PERFORMANCE GOVERNMENT REVENUE (CONT'D)

APRIL - JUNE 2021	CONSOLIDATED FUND			BGLC	JRC	TOTAL April to June 2021
	TAJ	CHASE	TOTAL			
	\$	\$	\$	\$	\$	\$
BETTING SECTOR						
<i>Bookmakers Levy</i>						
Local Horseracing	1,884,120	-	1,884,120	3,130,467	15,652,337	20,666,924
Simulcast racing	927,228	-	927,228	1,545,380	7,726,900	10,199,508
Sports betting	25,532,927	3,017,368	28,550,295	3,017,368	-	31,567,663
Unclaimed Winnings	-	-	-	-	-	-
Bookmakers' License Fees	-	-	-	-	-	-
SUB-TOTAL	28,344,276	3,017,368	31,361,643	7,693,215	23,379,237	62,434,095
<i>Racing Promoter Pool Betting Duty</i>						
Racing Promoter's License Fees	-	-	-	-	-	-
Local Horseracing	3,594,252	-	3,594,252	1,797,126	8,087,066	13,478,444
Simulcast racing	3,830,460	-	3,830,460	1,915,230	8,618,534	14,364,223
Unclaimed Winnings	-	-	-	-	-	-
SUB-TOTAL	7,424,711	-	7,424,711	3,712,356	6,705,600	27,842,667
TOTAL BETTING	35,768,987	3,017,368	38,786,355	11,405,571	40,084,837	90,276,762
LOTTERY SECTOR LOTTERY						
Lottery Tax	991,779,638	545,241,553	1,537,021,192	268,793,889	-	1,805,815,081
Lottery Winnings Levy	120,522,922	-	120,522,922	-	-	120,522,922
Unclaimed Winnings	-	58,296,430	58,296,430	53,601,590	-	111,898,020
Lottery Licence Fees	-	-	-	-	-	-
TOTAL LOTTERY	1,112,302,561	603,537,983	1,715,840,544	322,395,479	-	2,038,236,023
GAMING SECTOR GAMING						
Gaming Lounges	47,016,399	7,233,292	54,249,692	18,083,231	-	72,332,922
Non-gaming lounges	2,641,750	404,472	3,046,222	1,692,142	-	4,738,364
Licence fees	-	0	0	-	-	0
Technical Service Provider	-	-	-	-	-	-
TOTAL GAMING	49,658,149	7,637,765	57,295,913	19,775,373	-	77,071,286
Prize Competition	-	-	-	-	-	0
Charitable Bingo Licence Fees	0	-	-	-	-	0
INDUSTRY TOTAL	1,197,729,696	614,193,115	1,811,922,812	353,576,423	40,084,837	2,205,584,071

APRIL - JUNE 2020	CONSOLIDATED FUND			BGLC	JRC	TOTAL April to June 2020
	TAJ	CHASE	TOTAL			
	\$	\$	\$			
BETTING SECTOR						
<i>Bookmakers: Levy</i>						
Local Horseracing	102,039	-	102,039	169,131	845,655	1,116,824
Simulcast racing	66,038	-	66,038	110,064	550,320	726,422
Sports betting	5,128,105	732,586	5,860,692	8,986,168	-	14,846,859
Unclaimed Winnings	-	-	0	0	-	0
Bookmakers' License Fees	-	-	0	0	-	0
SUB-TOTAL	5,296,182	732,586	6,028,769	9,265,362	1,395,974	16,690,105
<i>Racing Promoter: Pool Betting Duty</i>						
Racing Promoter's License Fees	-	-	0	0	0	0
Local Horseracing	466,241	-	466,241	233,120	1,049,042	1,748,403
Simulcast racing	317,087	-	317,087	158,543	713,445	1,189,075
Unclaimed Winnings				0		0
SUB-TOTAL	783,327	0	783,327	391,664	1,762,486	2,937,477
TOTAL BETTING	6,079,509	732,586	6,812,096	9,657,026	3,158,461	19,627,583
LOTTERY SECTOR						
Lottery Tax	781,848,352	452,856,794	1,234,705,146	223,326,641	-	1,458,031,787
Lottery Winnings Levy	67,717,863	-	67,717,863	-	-	67,717,863
Unclaimed Winnings	-	47,273,468	47,273,468	47,273,468	-	94,546,936
Lottery Licence Fees	-	-	-	0	-	0
TOTAL LOTTERY	849,566,215	500,130,262	1,349,696,477	270,600,109	0	1,620,296,586
GAMING SECTOR						
Gaming Lounges	0	0	0	0	-	0
Non-gaming lounges	267,842	41,206	309,049	103,016	-	412,065
Licence fees		0	0	0	-	0
Technical Service Provider	0	0	0	0	-	0
TOTAL GAMING	267,842	41,206	309,049	103,016	0	412,065
Prize Competition	-	-	-	0	-	0
Charitable Bingo Licence Fees	0	0	0	0	0	0
INDUSTRY TOTAL	855,913,567	500,904,055	1,356,817,621	280,360,151	3,158,461	1,640,336,234



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