



GAMING INDUSTRY STATISTICS - QUARTERLY HIGHLIGHTS

Q3 2021 – OCT TO DEC 2021

QUARTERLY GAMING INDUSTRY HIGHLIGHTS

Reporting Period: 3RD Quarter October to December 2021

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

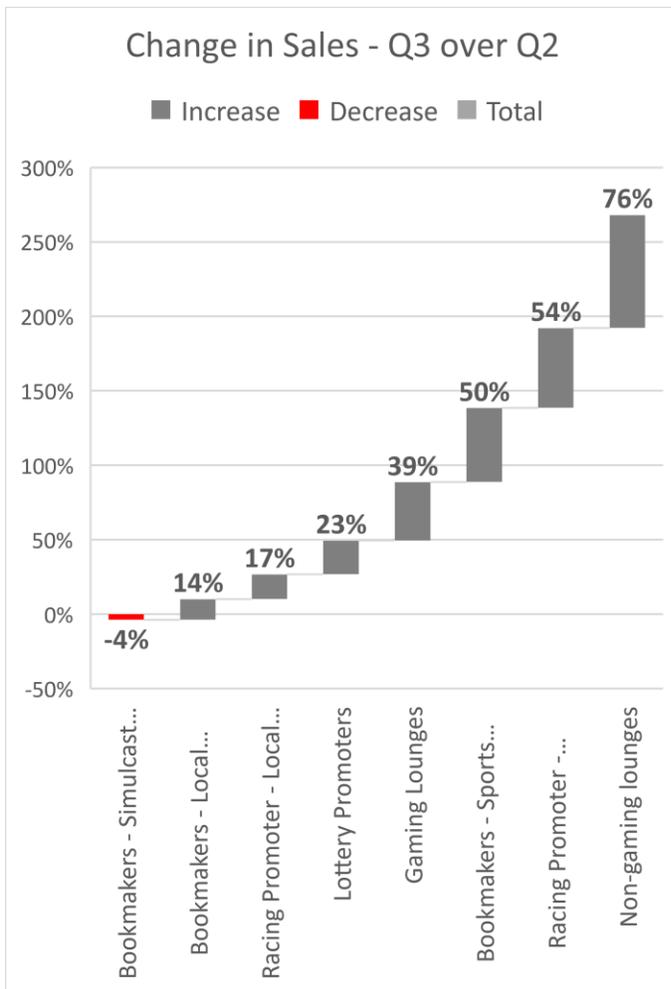
2021 | Third Quarter INDUSTRY PERFORMANCE – SALES

Total industry third quarter sales for October – December 2021 amounted to J\$48.741 billion and exceeded the previous quarter July to September 2021 by 33.39%.

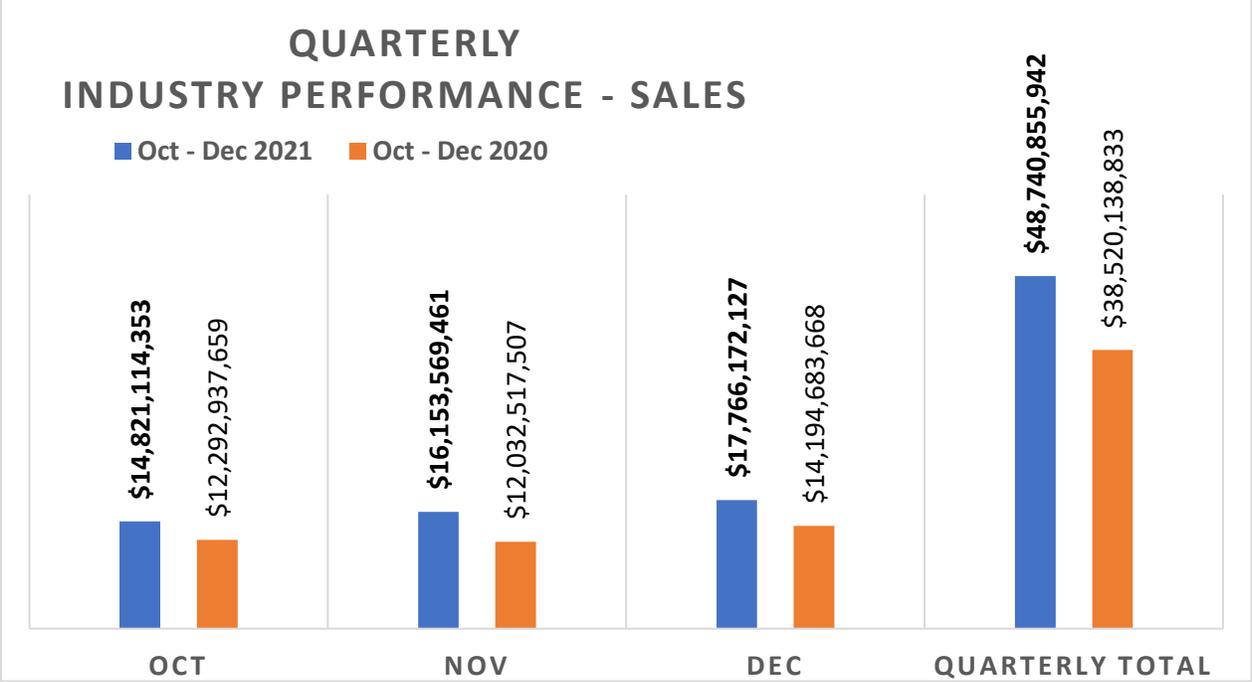
The industry is showing signs of recovery from the pandemic and the Covid-19 restrictions which were imposed during Q2, with increases in sales in all sectors except for sales in simulcast horseracing generated by Bookmakers which decreased by 4%. In the non-gaming lounge sector, PSJL-Ice Jamaica Limited generated 71% of the total sales in that category and was the main contributor for the 76% increase in sales.

Gaming lounges in St. Andrew and St. James generated 67% and 27% of total sales respectively for Q3 growing sales by 39% when compared to Q2. Gaming lounges and non-gaming lounges in hotels continue to be impacted by low hotel occupancy due to COVID-19 with three (3) licensed locations remaining temporarily closed. As the pandemic continues to impact tourist arrivals which limits recreational spending on gaming, sales in gaming lounges in hotels will see slow growth into 2022.

Lottery sector had its best quarter performance to date with a 23% increase over the previous quarter driven by promotional and product enhancements, channel changes and expansion.



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



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

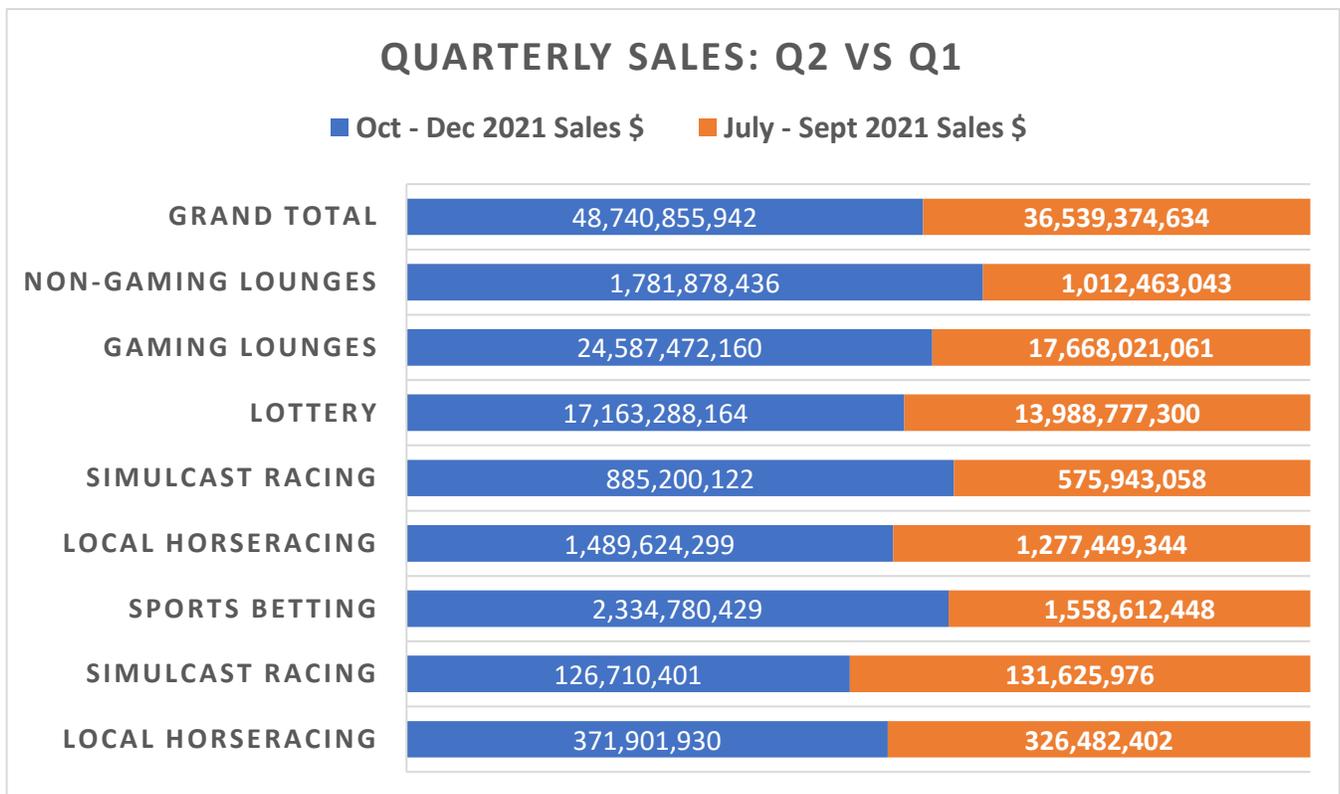
COMPARATIVE QUARTERLY SALES

■ Quarter Oct-Dec 2021
 ■ Quarter Oct-Dec 2020

	Quarter Oct-Dec 2021	Quarter Oct-Dec 2020
GRAND TOTAL	\$48,740,855,942	\$38,520,138,833
Non-gaming lounges	\$1,781,878,436	\$1,304,698,725
Gaming Lounges	\$24,587,472,160	\$19,043,535,143
Lottery Promoters	\$17,163,288,164	\$13,851,556,270
Racing Promoter - Simulcast racing	\$885,200,122	\$861,396,626
Racing Promoter - Local Horseracing	\$1,489,624,299	\$1,316,241,758
Bookmakers - Sports betting	\$2,334,780,429	\$1,639,280,272
Bookmakers - Simulcast racing	\$126,710,401	\$174,477,337
Bookmakers - Local Horseracing	\$371,901,930	\$328,952,702

2021 | Third 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	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 (Restated)	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	10,432,495,908	8,769,119,585	1,663,376,323	12,439,671,992	10,327,609,755	2,112,062,237
SEPT	10,477,460,835	9,225,169,920	1,252,290,915	10,991,237,481	9,083,659,201	1,907,578,279
Q2 2021	36,539,374,634	31,187,487,719	5,351,886,915	33,439,552,199	27,454,770,104	5,984,782,095
OCT	14,821,114,353	12,484,428,481	2,336,685,872	12,292,937,659	10,105,664,781	2,187,272,878
NOV	16,153,569,461	13,660,930,968	2,492,638,494	12,032,517,507	10,134,311,111	1,898,206,396
DEC	17,766,172,127	14,941,296,517	2,824,875,610	14,194,683,668	11,955,977,681	2,238,705,987
Q3 2021	48,740,855,942	41,086,655,966	7,654,199,976	38,520,138,833	32,195,953,573	6,324,185,260



2021 | Third Quarter

INDUSTRY PERFORMANCE - SALES (CONT'D)

Oct - Dec 2021	Sales \$	Payout/Prize Liability \$	Declared Gross Profit \$
Bookmakers			
Local Horseracing	371,901,930	234,867,996	137,033,934
Simulcast racing	126,710,401	85,851,482	40,858,919
Sports betting	2,334,780,429	1,950,378,550	384,401,879
Sub-total - Bookmakers	2,833,392,760	2,271,098,028	562,294,732
Racing Promoter			
Local Horseracing	1,489,624,299	1,242,488,291	247,136,007
Simulcast racing	885,200,122	586,805,437	298,394,686
Sub-total - Racing Promoter	2,374,824,421	1,829,293,728	545,530,693
TOTAL - BETTING	5,208,217,182	4,100,391,756	1,107,825,425
LOTTERY	17,163,288,164	11,731,106,013	5,432,182,151
GAMING			
Gaming Lounges	24,587,472,160	23,540,893,588	1,046,578,573
Non-gaming lounges	1,781,878,436	1,714,264,610	67,613,826
Sub-total - Gaming	26,369,350,596	25,255,158,197	1,114,192,399
GRAND TOTAL	48,740,855,942	41,086,655,966	7,654,199,976

Oct - Dec 2020	Sales \$	Payout/Prize Liability \$	Declared Gross Profit \$
Bookmakers			
Local Horseracing	328,952,702	207,642,577	121,310,126
Simulcast racing	174,477,337	123,191,173	51,286,164
Sports betting	1,639,280,272	1,337,565,167	301,715,106
Sub-total - Bookmakers	2,142,710,311	1,668,398,916	474,311,395
Racing Promoter			
Local Horseracing	1,316,241,758	1,115,328,031	200,913,726
Simulcast racing	861,396,626	531,535,802	329,860,824
Sub-total - Racing Promoter	2,177,638,384	1,646,863,833	530,774,551
TOTAL - BETTING	4,320,348,695	3,315,262,749	1,005,085,946
LOTTERY	13,851,556,270	9,315,226,280	4,536,329,990
GAMING			
Gaming Lounges	19,043,535,143	18,314,693,345	728,841,798
Non-gaming lounges	1,304,698,725	1,250,771,199	53,927,526
Sub-total - Gaming	20,348,233,868	19,565,464,544	782,769,324
GRAND TOTAL	38,520,138,833	32,195,953,573	6,324,185,260

2021 | Third Quarter

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE

Government gains 17.7% in YTD revenue from gaming industry

SECTOR	Q3 2021 (\$)	Q3 2020 (\$)	CHANGE OVER Q3 2020	YTD APR-DEC 2021 (\$)	YTD APR-DEC 2020 (\$)	CHANGE OVER YTD APR-DEC 2020
BETTING						
Bookmakers	65,568,928	54,392,447	20.5%	173,564,172	111,246,082	56.0%
Racing Promoter	43,914,802	39,808,091	10.3%	105,439,638	90,780,480	16.1%
Total Betting	109,483,730	94,200,539	16.2%	279,003,810	202,026,561	38.1%
LOTTERY	2,294,246,843	1,919,478,906	19.5%	6,261,363,473	5,439,458,753	15.1%
GAMING	111,327,435	78,267,264	42.2%	265,272,104	142,892,618	85.6%
Total Industry Government Revenue	2,515,058,007	2,091,946,708	20.2%	6,805,639,386	5,784,377,933	17.7%

Total Government Revenue from betting, lottery and gaming reached \$2.515 billion, growing 20% over the comparative quarter 2020 and 27% from the July – September 2021 quarter.

Betting Sector

The pandemic, vaccination rate and the recent surge in the Omicron variant impacted host tracks in North America and the UK which affected simulcast horseracing offered by both Bookmakers and the Racing Promoter, Supreme Ventures Racing and Entertainment Limited (SVREL). Bookmakers and the Racing Promoter reported decreases in simulcast horseracing by -23.6% and -9.5% respectively. Notwithstanding, Bookmakers generated increases in Government revenue from local horseracing (11.6%) and sports betting (35.2%) while the Racing Promoter reported a 23% increase of in local horseracing. This sector contributes 4% of total Government Revenue.

Gaming Sector

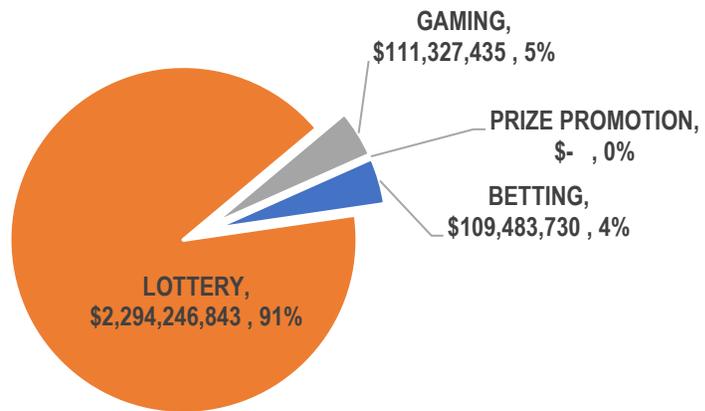
Gaming sustained growth since the first quarter, with Government revenue increasing by 42.2% over the comparative period in 2020 and 43.4% over Q2 July – September 2021. Revenue from Gaming lounges and non-gaming lounges increased by 45.3% and 19.1% respectively. Growth in revenue was reported in all parishes except Hanover where one gaming lounge is located in a hotel. The number of slot machines in gaming lounges in St. Andrew increased by 28 in Q3 when compared to Q2. This sector contributes 5% of total Government Revenue.

Lottery Sector

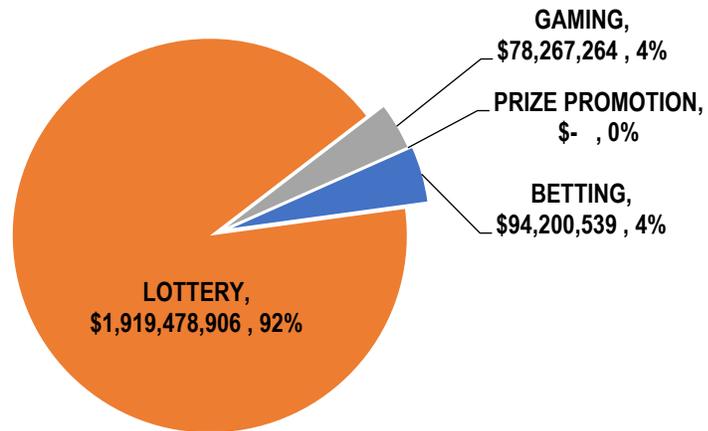
Government revenue from lottery continued to grow in the third quarter expanding by 19% over Q2 2021 and represented 91% of total Government revenue. Gaming consumers' wagers generated \$17.1 billion in sales (22% increase over Q2 July – September 2021) with payout of \$11.7 billion. The revenue from lottery is driven by promotional and product enhancements as well as channel expansion (physical retail locations).

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

Government Revenue by Sector Oct - Dec 2021

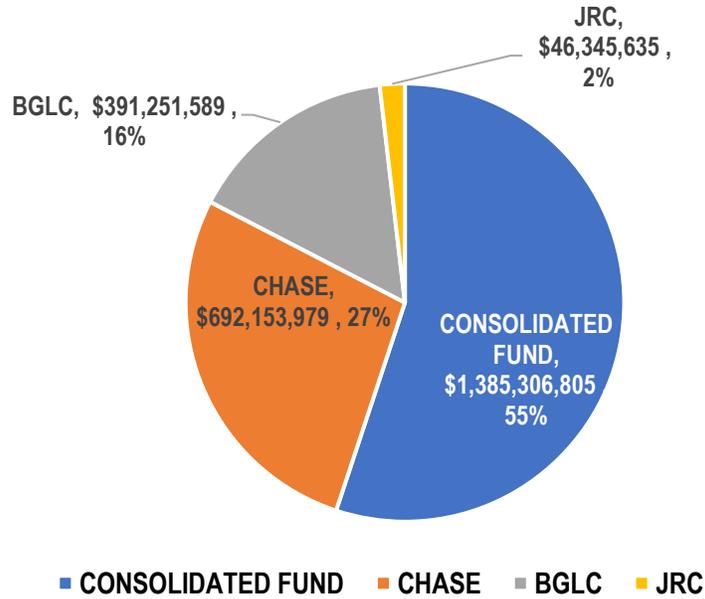


Government Revenue by Sector Oct - Dec 2020

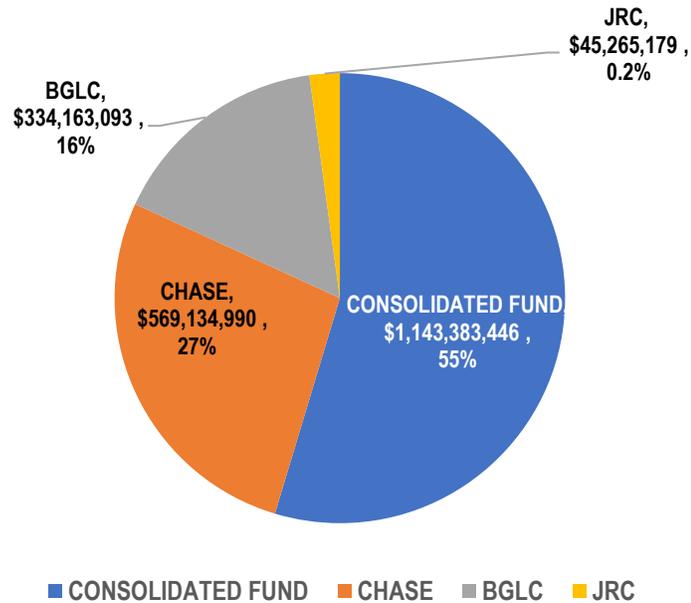


INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

Government Revenue by Recipient Oct -Dec 2021



Government Revenue by Recipient Sept-Dec 2020



INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

OCTOBER - DECEMBER 2021	CONSOLIDATED FUND			BGLC	JRC	TOTAL October to December 2021
	TAJ	CHASE	TOTAL			
BETTING SECTOR						
<i>Bookmakers Levy</i>						
Local Horseracing	2,054,788	-	2,054,788	3,415,179	17,075,896	22,545,863
Simulcast racing	566,503	-	566,503	944,171	4,720,857	6,231,532
Sports betting	26,889,574	3,841,368	30,730,942	3,841,368	-	34,572,310
Unclaimed Winnings	-	-	-	2,219,223	-	2,219,223
Bookmakers' License Fees	-	-	-	-	-	-
SUB-TOTAL	29,510,865	3,841,368	33,352,233	10,419,942	21,796,753	65,568,928
<i>Racing Promoter Pool Betting Duty</i>						
Racing Promoter's License Fees	-	-	-	-	-	-
Local Horseracing	4,942,720	-	4,942,720	2,471,360	11,121,120	18,535,201
Simulcast racing	5,967,894	-	5,967,894	2,983,947	13,427,761	22,379,601
Unclaimed Winnings	-	-	-	3,000,000	-	3,000,000
SUB-TOTAL	10,910,614	-	10,910,614	8,455,307	24,548,881	43,914,802
TOTAL BETTING	40,421,479	3,841,368	44,262,846	18,875,249	46,345,635	109,483,730
LOTTERY SECTOR						
Lottery Tax	1,072,983,749	620,907,138	1,693,890,887	291,194,233	-	1,985,085,120
Lottery Winnings Levy	199,570,877	-	199,570,877	-	-	199,570,877
Unclaimed Winnings	-	56,263,549	56,263,549	53,327,297	-	109,590,846
Lottery Licence Fees	-	-	-	-	-	-
TOTAL LOTTERY	1,272,554,625	677,170,687	1,949,725,313	344,521,530	-	2,294,246,843
GAMING SECTOR						
Gaming Lounges	68,027,607	10,465,786	78,493,393	26,164,464	-	104,657,857
Non-gaming lounges	4,303,094	676,138	4,979,232	1,690,346	-	6,669,578
Licence fees	-	0	0	-	-	0
Technical Service Provider	-	-	-	-	-	-
TOTAL GAMING	72,330,701	11,141,924	83,472,625	27,854,810	-	111,327,435
Prize Competition	-	-	-	-	-	0
Charitable Bingo Licence Fees	0	-	-	-	-	0
INDUSTRY TOTAL	1,385,306,805	692,153,979	2,077,460,784	391,251,589	46,345,635	2,515,058,007

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

OCTOBER - DECEMBER 2020	CONSOLIDATED FUND			BGLC	JRC	TOTAL October to December 2020
	TAJ	CHASE	TOTAL			
BETTING SECTOR						
<i>Bookmakers Levy</i>						
Local Horseracing	1,843,531	-	1,843,531	3,061,084	15,305,421	20,210,036
Simulcast racing	781,635	-	781,635	1,302,725	6,074,903	8,159,264
Sports betting	19,889,043	2,841,292	22,730,335	2,841,292	-	25,571,627
Unclaimed Winnings	-	-	0	451,520	-	451,520
Bookmakers' License Fees	-	-	0	0	-	0
SUB-TOTAL	22,514,209	2,841,292	25,355,501	7,656,622	21,380,324	54,392,447
<i>Racing Promoter Pool Betting Duty</i>						
Racing Promoter's License Fees	-	-	0	0	0	0
Local Horseracing	4,018,275	-	4,018,275	2,009,137	9,041,118	15,068,529
Simulcast racing	6,597,216	-	6,597,216	3,298,608	14,843,737	24,739,562
Unclaimed Winnings	-	-	0	0	-	0
SUB-TOTAL	10,615,491	-	10,615,491	5,307,746	23,884,855	39,808,091
TOTAL BETTING	33,129,700	2,841,292	35,970,992	12,964,367	45,265,179	94,200,539
LOTTERY SECTOR						
Lottery Tax	969,815,049	506,733,239	1,476,548,288	249,895,842	-	1,726,444,130
Lottery Winnings Levy	89,570,425	-	89,570,425	-	-	89,570,425
Unclaimed Winnings	-	51,732,175	51,732,175	51,732,176	-	103,464,351
Lottery Licence Fees	-	-	0	0	-	0
TOTAL LOTTERY	1,059,385,474	558,465,414	1,617,850,888	301,628,018	-	1,919,478,906
GAMING SECTOR						
Gaming Lounges	47,374,717	7,288,418	54,663,135	18,221,045	-	72,884,180
Non-gaming lounges	3,493,555	539,866	4,033,420	1,349,664	-	5,383,084
Licence fees	-	0	0	0	-	0
Technical Service Provider	0	0	0	0	-	0
TOTAL GAMING	50,868,272	7,828,283	58,696,555	19,570,709	0	78,267,264
Prize Competition	-	-	-	0	-	0
Charitable Bingo Licence Fees	0	0	0	0	0	0
INDUSTRY TOTAL	1,143,383,446	569,134,990	1,712,518,436	334,163,093	45,265,179	2,091,946,708