



# **GAMING INDUSTRY STATISTICS - QUARTERLY HIGHLIGHTS**

**Q1 2022 – APR TO JUN 2022**

# QUARTERLY GAMING INDUSTRY HIGHLIGHTS

## Reporting Period: 1<sup>st</sup> Quarter April to June 2022

This document provides an overview, key highlights and statistics for Jamaica's gaming industry for the quarter of April – June 2022 (Q1 2022). Performance for this period is compared against the same period in the prior year (Q1 2021) as well as the immediately preceding months which are Q4 2021 (January to 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.

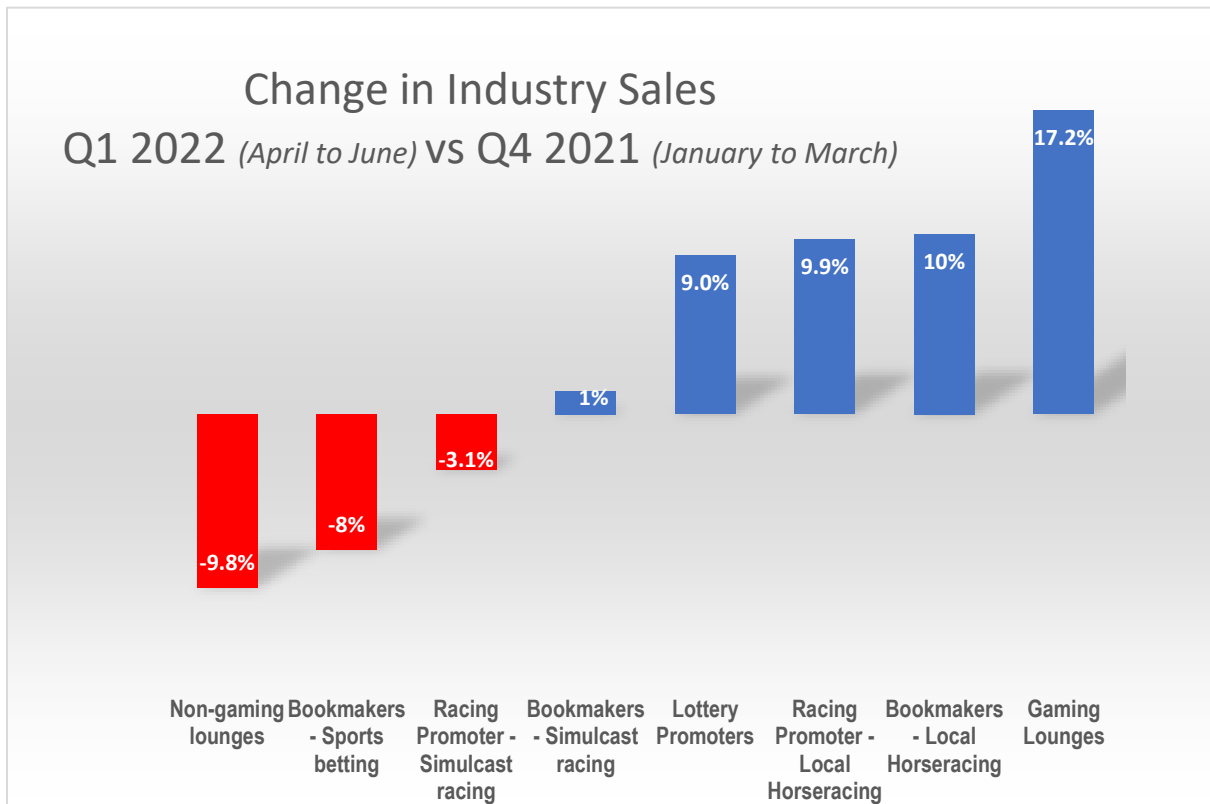
**Data presented is correct at the time of publication. However, may be adjusted without notice.**

# 2022 | 1st Quarter

## INDUSTRY PERFORMANCE – SALES

### Comparing Q1 2022 (April to June) to Q4 2021 (January to March)

Total industry first quarter sales for April - June 2022 amounted to J\$59.970 billion and exceeded the previous quarter January to March 2022 by 11.8%. In comparison to the previous corresponding quarter, sales increased by 49%.



The industry has shown signs of recovery from the pandemic, with increases in sales in all sectors except in the betting sector that recorded a marginal 0.1% decrease. Sports betting decreased by 7.7%, while the racing promoter, simulcast racing decreased by 3.1%. The lottery and gaming sectors recorded increases of 9% and 15.7% respectively. In the non-gaming lounge sector, Supreme Route formerly, ICE Jamaica Limited, generated 51% of the total sales in that category, contributing 67% of the revenue from this sector.

Gaming lounges in St. Andrew and St. James generated 67% and 28% of total sales respectively for Q1. Sales grew by 17.2% when compared to Q4. Gaming lounges and non-gaming lounges in hotels have shown signs of steady recovery. Gaming lounges and non-gaming lounges in hotels

have shown signs of steady recovery in parallel with the increases in visitor arrivals. However, one (1) licensed locations remains temporarily closed, and two (2) additional locations were closed during Q1. Three (3) locations were reclassified as non-gaming lounges.

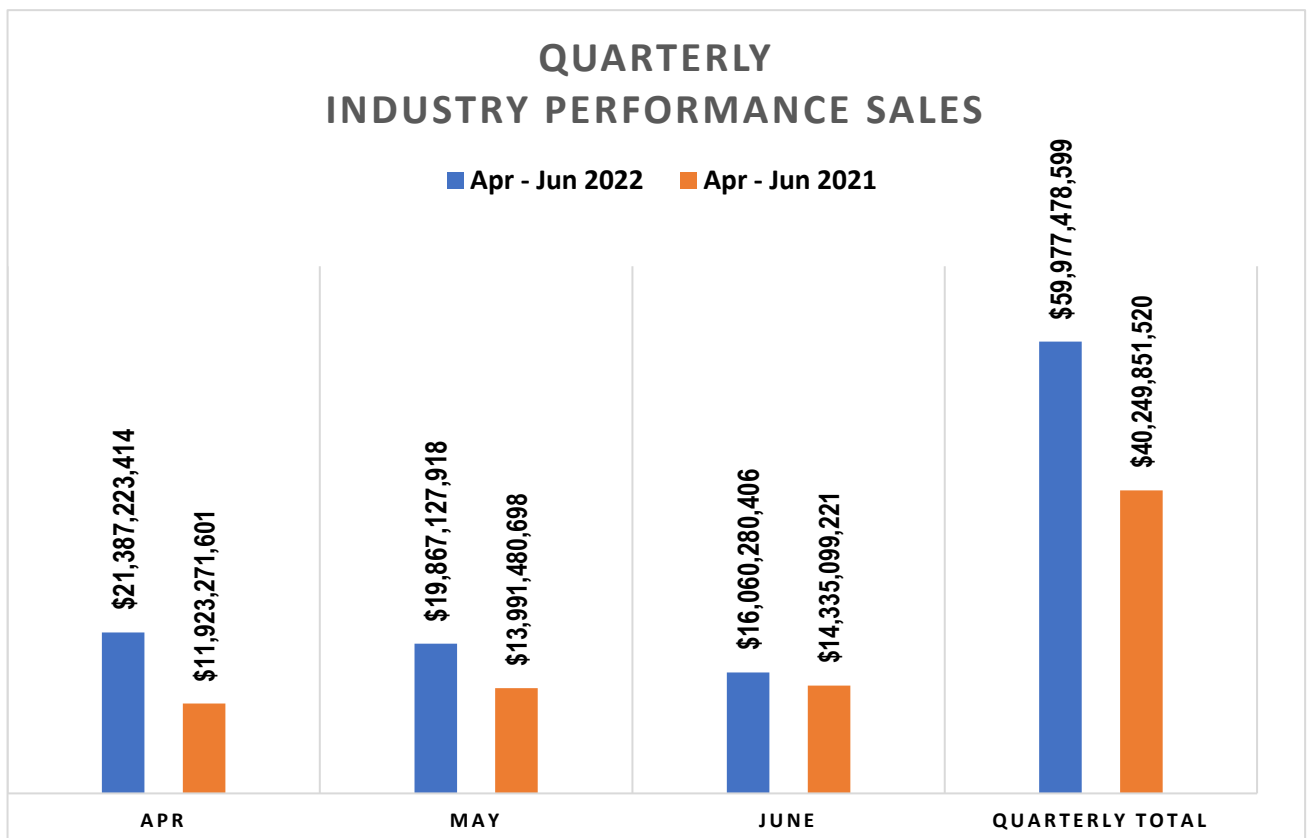
### INDUSTRY PERFORMANCE - QUARTERLY SALES - Q1 2022 VS Q4 2021

■ Apr - Jun 2022 Sales \$    ■ Jan - Mar 2022 Sales \$

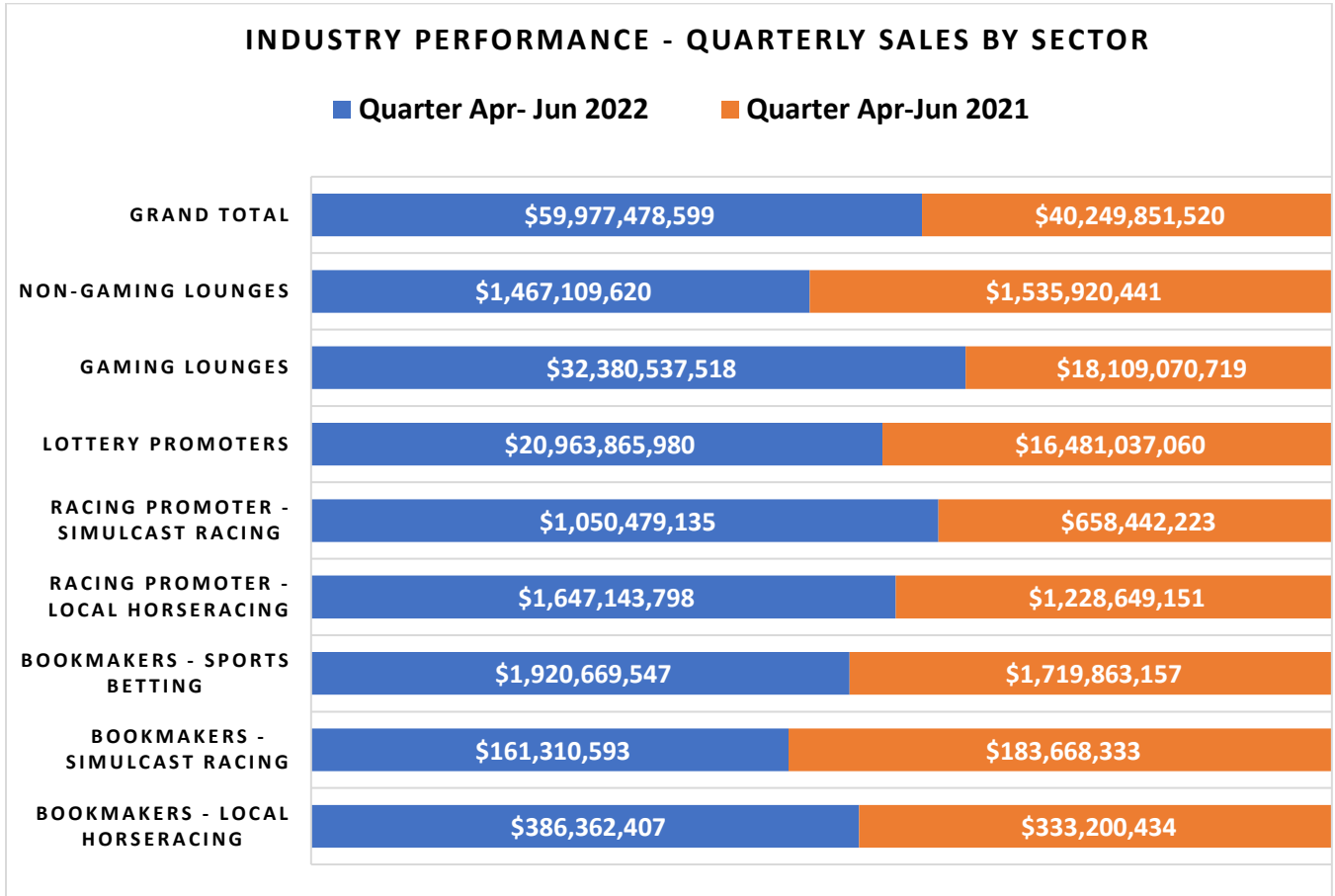
	Apr - Jun 2022 Sales \$	Jan - Mar 2022 Sales \$
<b>GRAND TOTAL</b>	<b>59,977,478,599</b>	<b>53,659,729,709</b>
<b>SUB-TOTAL</b>	<b>33,847,647,138</b>	<b>29,252,217,328</b>
<b>NON-GAMING LOUNGES</b>	<b>1,467,109,620</b>	<b>1,627,301,788</b>
<b>GAMING LOUNGES</b>	<b>32,380,537,518</b>	<b>27,624,915,539</b>
<b>LOTTERY</b>	<b>20,963,865,980</b>	<b>19,233,794,100</b>
<b>TOTAL - BETTING</b>	<b>5,165,965,480</b>	<b>5,173,718,281</b>
<b>SUB-TOTAL</b>	<b>2,697,622,932</b>	<b>2,583,301,860</b>
<b>SIMULCAST RACING</b>	<b>1,050,479,135</b>	<b>1,084,546,484</b>
<b>LOCAL HORSERACING</b>	<b>1,647,143,798</b>	<b>1,498,755,376</b>
<b>SUB-TOTAL</b>	<b>2,468,342,548</b>	<b>2,590,416,421</b>
<b>SPORTS BETTING</b>	<b>1,920,669,547</b>	<b>2,080,702,810</b>
<b>SIMULCAST RACING</b>	<b>161,310,593</b>	<b>159,168,282</b>
<b>LOCAL HORSERACING</b>	<b>386,362,407</b>	<b>350,545,328</b>

# 2022 | 1<sup>st</sup> Quarter INDUSTRY PERFORMANCE – SALES

Comparing Q1 2022 (April to June) with prior year (April to June 2021)



**2022 | 1<sup>st</sup> Quarter**  
**INDUSTRY PERFORMANCE – SALES (Cont'd)**  
**Comparing Q1 2022 (April to June) with prior year (April to June 2021)**



**2022 | 1<sup>st</sup> Quarter**  
**INDUSTRY PERFORMANCE**  
**Sales, Payout and Gross Profit**

	2022			2021		
	SALES	PAYOUT	GROSS PROFIT	SALES	PAYOUT	GROSS PROFIT
APR	21,387,223,414	18,251,062,916	3,136,160,499	11,923,271,601	9,769,576,695	2,153,694,906
MAY	19,867,127,918	16,876,644,947	2,990,482,972	13,991,480,698	11,573,610,323	2,417,870,375
JUN	18,723,127,266	16,060,280,406	2,662,846,860	14,335,099,221	12,229,922,833	2,105,176,388
<b>Q1 2022</b>	<b>59,977,478,599</b>	<b>51,187,988,268</b>	<b>8,789,490,330</b>	<b>40,249,851,520</b>	<b>33,573,109,851</b>	<b>6,676,741,669</b>

**2022 | First Quarter  
INDUSTRY PERFORMANCE**

Apr - June 2022	Sales \$	Payout/Prize Liability \$	Declared Gross Profit \$
<b>Bookmakers</b>			
Local Horseracing	386,362,407	242,188,470	144,173,937
Simulcast racing	161,310,593	98,579,018	62,731,575
Sports betting	1,920,669,547	1,601,104,144	319,565,404
<b>Sub-total</b>	<b>2,468,342,548</b>	<b>1,941,871,632</b>	<b>526,470,916</b>
<b>Racing Promoter</b>			
Local Horseracing	1,647,143,798	1,358,112,885	289,030,912
Simulcast racing	1,050,479,135	697,063,311	353,415,824
<b>Sub-total</b>	<b>2,697,622,932</b>	<b>2,055,176,196</b>	<b>642,446,736</b>
<b>TOTAL - BETTING</b>	<b>5,165,965,480</b>	<b>3,997,047,828</b>	<b>1,168,917,652</b>
<b>LOTTERY</b>	<b>20,963,865,980</b>	<b>14,745,441,490</b>	<b>6,218,424,490</b>
<b>GAMING</b>			
Gaming Lounges	32,380,537,518	31,051,528,504	1,329,009,014
Non-gaming lounges	1,467,109,620	1,393,970,446	73,139,174
<b>Sub-total</b>	<b>33,847,647,138</b>	<b>32,445,498,950</b>	<b>1,402,148,188</b>
<b>GRAND TOTAL</b>	<b>59,977,478,599</b>	<b>51,187,988,268</b>	<b>8,789,490,330</b>

Apr - June 2021	Sales \$	Payout/Prize Liability \$	Declared Gross Profit \$
<b>Bookmakers</b>			
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
<b>Sub-total</b>	<b>2,236,731,925</b>	<b>1,749,278,468</b>	<b>487,453,456</b>
<b>Racing Promoter</b>			
Local Horseracing	1,228,649,151	1,027,244,166	201,404,985
Simulcast racing	658,442,223	424,661,828	233,780,395
<b>Sub-total</b>	<b>1,887,091,375</b>	<b>1,451,905,994</b>	<b>435,185,380</b>
<b>TOTAL - BETTING</b>	<b>4,123,823,299</b>	<b>3,201,184,463</b>	<b>922,638,837</b>
<b>LOTTERY</b>	<b>16,481,037,060</b>	<b>11,500,966,438</b>	<b>4,980,070,622</b>
<b>GAMING</b>			
Gaming Lounges	18,109,070,719	17,385,741,497	723,329,222
Non-gaming lounges	1,535,920,441	1,485,217,453	46,211,460
<b>Sub-total</b>	<b>19,644,991,161</b>	<b>18,870,958,950</b>	<b>769,540,682</b>
<b>GRAND TOTAL</b>	<b>40,249,851,520</b>	<b>33,573,109,851</b>	<b>6,672,250,141</b>

## 2022 | 1st Quarter (April to June)

### INDUSTRY PERFORMANCE - GOVERNMENT REVENUE

#### Government gains 24.6% in YTD revenue from gaming industry

SECTOR	Q1 2022	Q1 2021	% CHANGE
	(\$) April to June	(\$) April to June	
<b>BETTING</b>			
Bookmakers	66,988,467	62,482,742	7.2%
Racing Promoter	70,388,708	37,527,904	87.6%
<b>Total Betting</b>	<b>137,377,174</b>	<b>100,010,646</b>	<b>37.4%</b>
<b>LOTTERY</b>	<b>2,661,145,074</b>	<b>2,262,125,015</b>	<b>17.6%</b>
<b>GAMING</b>	<b>335,652,560</b>	<b>154,187,602</b>	<b>117.7%</b>
<b>PRIZE COMPETITION/BINGO</b>	<b>3,670,000</b>	<b>2,895,000</b>	<b>26.8%</b>
<b>TOTAL INDUSTRY GOVERNMENT REVENUE</b>	<b>3,137,844,809</b>	<b>2,519,218,263</b>	<b>24.6%</b>

Total Government Revenue from betting, lottery and gaming reached \$3.138 billion, growing 24.6% over the comparative quarter of 2021 and 15.7% from the January - March 2022 quarter.

#### Betting Sector

Bookmakers' revenue increased by 8.9% and the Racing Promoter by 19.4% Q12022 vs Q42021. All betting modes reported increases in revenue, except in sports betting and racing promoter simulcast horseracing, which reported decreases of -8.5% and -2.3% respectively. Government revenue from betting sector was 4%. Bookmakers contributed 49% and the racing promoter reported a 51% of the total betting revenue.

#### Gaming Sector

The gaming sector recorded a 117.7% increase in government revenue for Q1 2022 vs the same period in 2021 (April to June 2021). Revenue from gaming lounges and non-gaming lounges (Under 19's) increased by 84.3% and 33% respectively in Q1 2022 vs Q1 2021. This significant increase is as a result of the recovery of the sector from the pandemic which has generated a 156% increase in licence fees earned primarily for licensing of locally-made gaming machines and premises as well as an 18% increase in licensing of Technical Services Providers (TSPs), manufacturers and assemblers of locally-made gaming machines.

The gaming sector generated a 166.9% increase in government revenue for Q1 2022 (April to June 2022) versus the immediately prior period, Q4 2021 (January to March 2022).

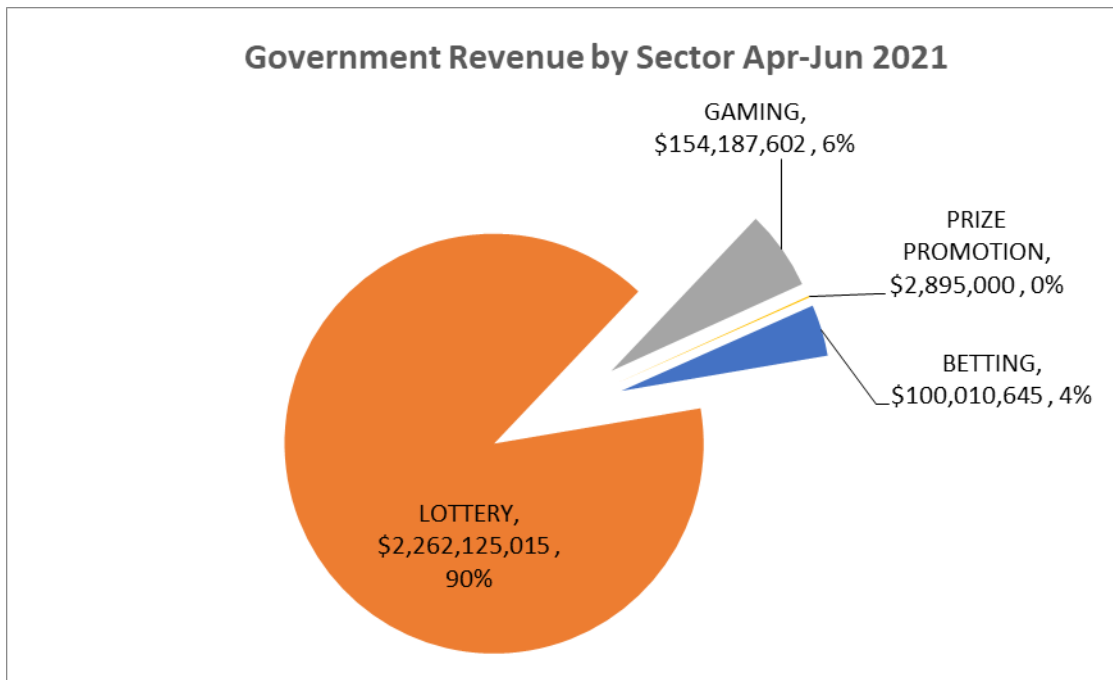
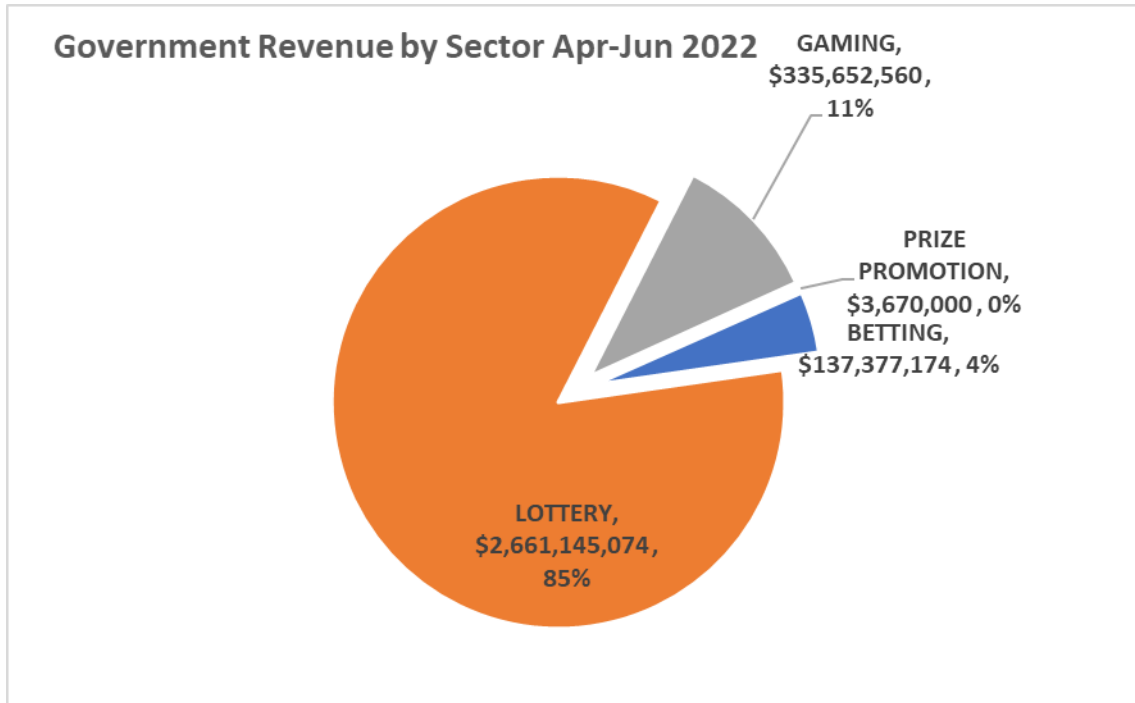
#### Lottery Sector

Government revenue from lottery continued to grow in the first quarter expanding by 7.6% over Q4 2022 and represented 85% of total Government revenue. The revenue from lottery is driven

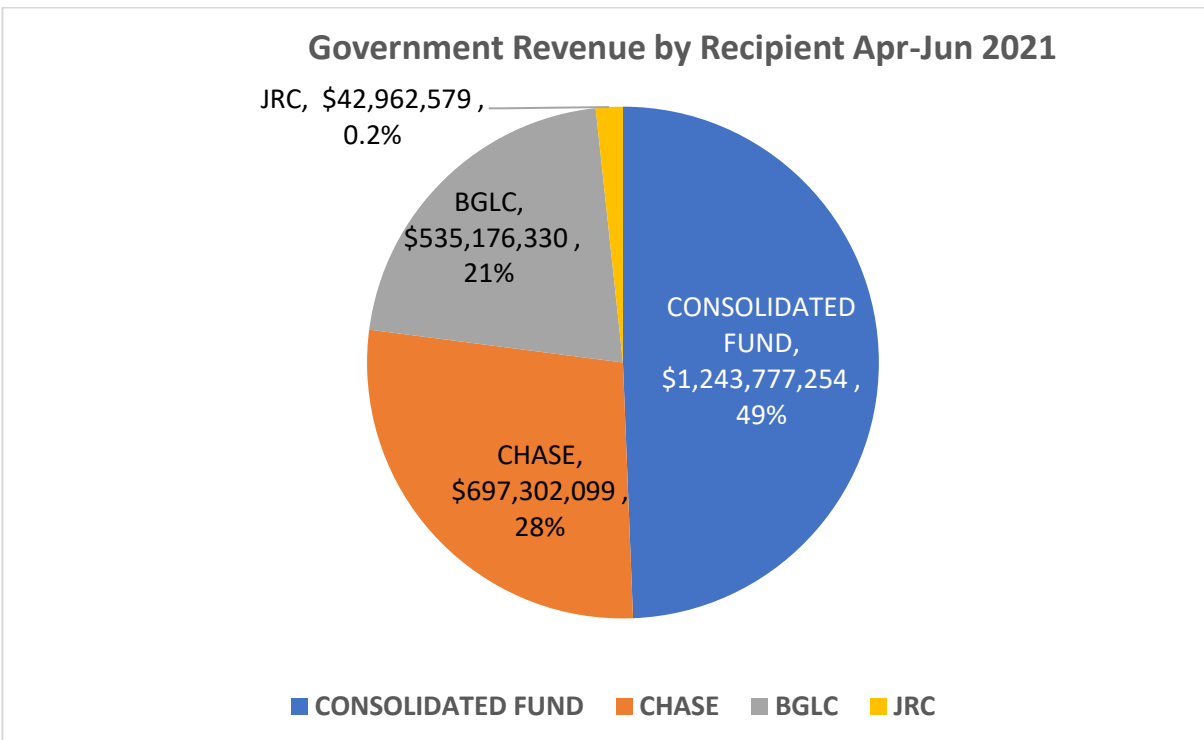
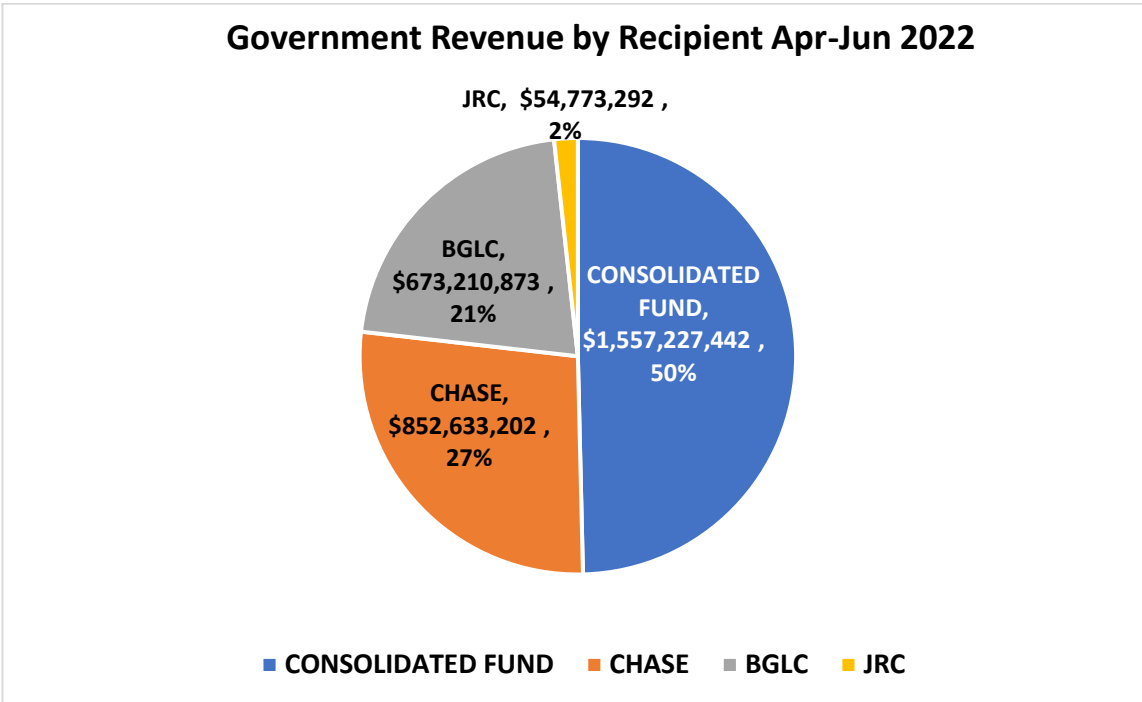


by promotional and product enhancements as well as channel expansion (physical retail locations, mobile retail sellers and apps).

## INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)



## INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)



## INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

<b>APRIL - JUNE 2022</b>	CONSOLIDATED FUND			BGLC	JRC	TOTAL April to June 2022
	TAJ	CHASE	TOTAL			
<b>BETTING SECTOR</b>						
<b><u>Bookmakers Levy</u></b>						
Local Horseracing	2,167,889	-	2,167,889	3,604,348	18,021,742	23,793,980
Simulcast racing	940,974	-	940,974	1,568,289	7,841,447	10,350,710
Sports betting	22,294,469	3,195,654	25,490,123	3,195,654	-	28,685,777
Unclaimed Winnings	-	-	-	-	-	-
Bookmakers' License Fees	-	-	-	4,158,000	-	4,158,000
<b>SUB-TOTAL</b>	<b>25,403,332</b>	<b>3,195,654</b>	<b>28,598,986</b>	<b>12,526,292</b>	<b>25,863,189</b>	<b>66,988,467</b>
<b><u>Racing Promoter Pool Betting Duty</u></b>						
Racing Promoter's License Fees	-	-	-	5,550,000	-	5,550,000
Local Horseracing	5,780,618	-	5,780,618	2,890,309	13,006,391	21,677,318
Simulcast racing	7,068,316	-	7,068,316	3,534,158	15,903,712	26,506,187
Unclaimed Winnings	-	-	-	16,655,202	-	16,655,202
<b>SUB-TOTAL</b>	<b>12,848,935</b>	<b>-</b>	<b>12,848,935</b>	<b>28,629,670</b>	<b>28,910,103</b>	<b>70,388,708</b>
<b>TOTAL BETTING</b>	<b>38,252,266</b>	<b>3,195,654</b>	<b>41,447,920</b>	<b>41,155,962</b>	<b>54,773,292</b>	<b>137,377,174</b>
<b>LOTTERY SECTOR</b>						
Lottery Tax	1,232,301,299	764,505,780	1,996,807,079	377,197,460	-	2,374,004,539
Lottery Winnings Levy	102,064,137	-	102,064,137	-	-	102,064,137
Unclaimed Winnings	-	70,872,962	70,872,962	71,909,962	-	142,782,924
Lottery Licence Fees	-	-	-	42,293,475	-	42,293,475
<b>TOTAL LOTTERY</b>	<b>1,334,365,436</b>	<b>835,378,742</b>	<b>2,169,744,178</b>	<b>491,400,896</b>	<b>-</b>	<b>2,661,145,074</b>
<b>GAMING SECTOR</b>						
Gaming Lounges	86,621,478	13,326,381	99,947,860	33,315,953	-	133,263,813
Non-gaming lounges	4,760,761	732,425	5,493,186	1,831,062	-	7,324,247
Licence fees	93,227,500	0	93,227,500	93,937,000	-	187,164,500
Technical Service Provider	-	-	-	7,900,000	-	7,900,000
<b>TOTAL GAMING</b>	<b>184,609,739</b>	<b>14,058,806</b>	<b>198,668,545</b>	<b>136,984,015</b>	<b>-</b>	<b>335,652,560</b>
Prize Competition	-	-	-	3,640,000	-	3,640,000
Charitable Bingo Licence Fees	0	-	-	30,000	-	30,000
<b>INDUSTRY TOTAL</b>	<b>1,557,227,442</b>	<b>852,633,202</b>	<b>2,409,860,644</b>	<b>673,210,873</b>	<b>54,773,292</b>	<b>3,137,844,809</b>

## INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

<b>APRIL - JUNE 2021</b>	CONSOLIDATED FUND			BGLC	JRC	TOTAL April to June 2021
	TAJ	CHASE	TOTAL			
<b>BETTING SECTOR</b>						
<i><b>Bookmakers Levy</b></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	21,121,573	3,017,368	24,138,941	3,017,368	-	27,156,309
Unclaimed Winnings	-	-	-	-	-	-
Bookmakers' License Fees	-	-	-	4,460,000	-	4,460,000
<b>SUB-TOTAL</b>	<b>23,932,922</b>	<b>3,017,368</b>	<b>26,950,290</b>	<b>12,153,215</b>	<b>23,379,237</b>	<b>62,482,741</b>
<i><b>Racing Promoter Pool Betting Duty</b></i>						
Racing Promoter's License Fees	-	-	-	4,889,000	-	4,889,000
Local Horseracing	4,028,100	-	4,028,100	2,014,050	9,063,224	15,105,374
Simulcast racing	4,675,608	-	4,675,608	2,337,804	10,520,118	17,533,530
Unclaimed Winnings	-	-	-	-	-	-
<b>SUB-TOTAL</b>	<b>8,703,708</b>	<b>-</b>	<b>8,703,708</b>	<b>9,240,854</b>	<b>19,583,342</b>	<b>37,527,904</b>
<b>TOTAL BETTING</b>	<b>32,636,629</b>	<b>3,017,368</b>	<b>35,653,997</b>	<b>21,394,069</b>	<b>42,962,579</b>	<b>100,010,645</b>
<b>LOTTERY SECTOR</b>						
Lottery Tax	1,037,089,298	619,890,192	1,656,979,490	305,606,917	-	1,962,586,407
Lottery Winnings Levy	120,522,922	-	120,522,922	-	-	120,522,922
Unclaimed Winnings	-	66,654,043	66,654,043	66,654,043	-	133,308,086
Lottery Licence Fees	3,202,500	-	3,202,500	42,505,100	-	45,707,600
<b>TOTAL LOTTERY</b>	<b>1,160,814,720</b>	<b>686,544,235</b>	<b>1,847,358,955</b>	<b>414,766,060</b>	<b>-</b>	<b>2,262,125,015</b>
<b>GAMING SECTOR</b>						
Gaming Lounges	47,016,399	7,233,292	54,249,692	18,083,231	-	72,332,922
Non-gaming lounges	3,309,505	507,204	3,816,709	1,948,971	-	5,765,680
Licence fees	-	0	0	69,389,000	-	69,389,000
Technical Service Provider	-	-	-	6,700,000	-	6,700,000
<b>TOTAL GAMING</b>	<b>50,325,904</b>	<b>7,740,496</b>	<b>58,066,400</b>	<b>96,121,202</b>	<b>-</b>	<b>154,187,602</b>
Prize Competition	-	-	-	2,895,000	-	2,895,000
Charitable Bingo Licence Fees	0	-	-	-	-	0
<b>INDUSTRY TOTAL</b>	<b>1,243,777,254</b>	<b>697,302,099</b>	<b>1,941,079,352</b>	<b>535,176,330</b>	<b>42,962,579</b>	<b>2,519,218,262</b>