



GAMING INDUSTRY STATISTICS - QUARTERLY HIGHLIGHTS

Q2 2022 – JULY TO SEPT 2022

QUARTERLY GAMING INDUSTRY HIGHLIGHTS

Reporting Period: 2nd Quarter - July to September 2022

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

Information presented is by sector and 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.

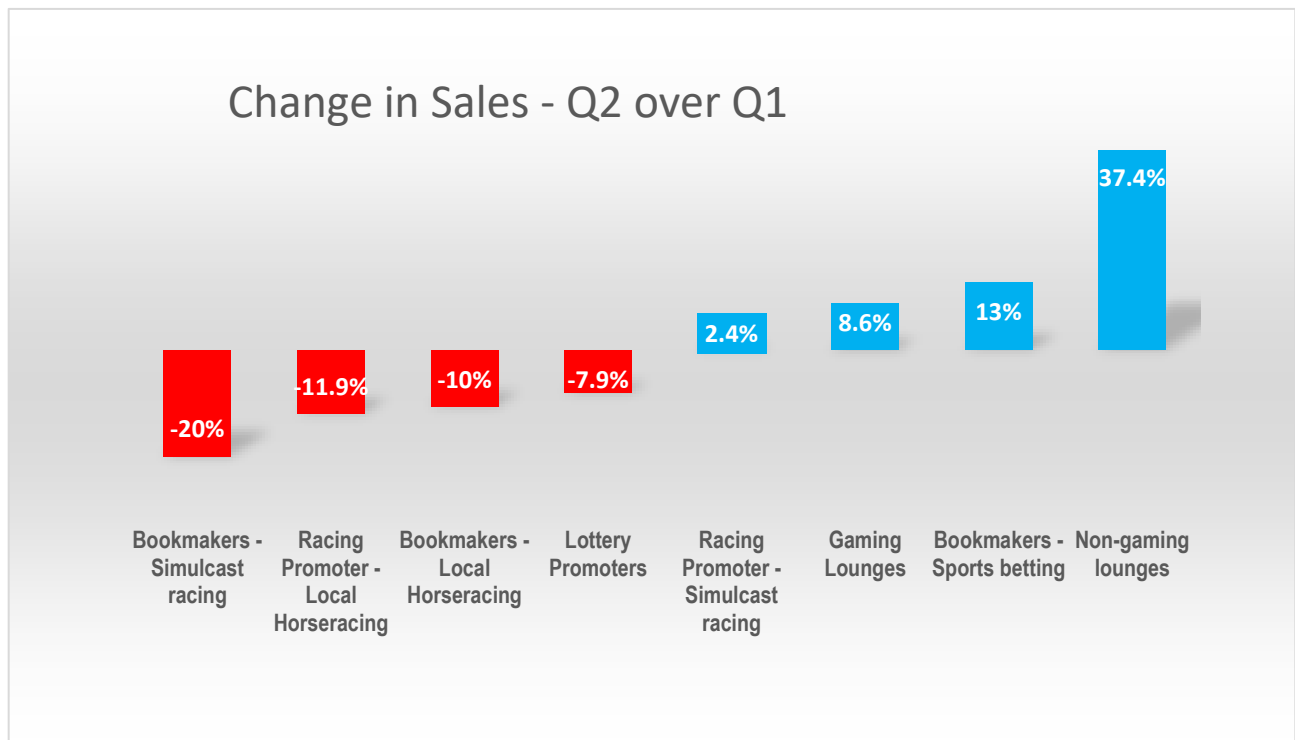
Data presented is correct at the time of publication. However, may be adjusted without notice.

2022 | 2nd Quarter INDUSTRY PERFORMANCE – SALES

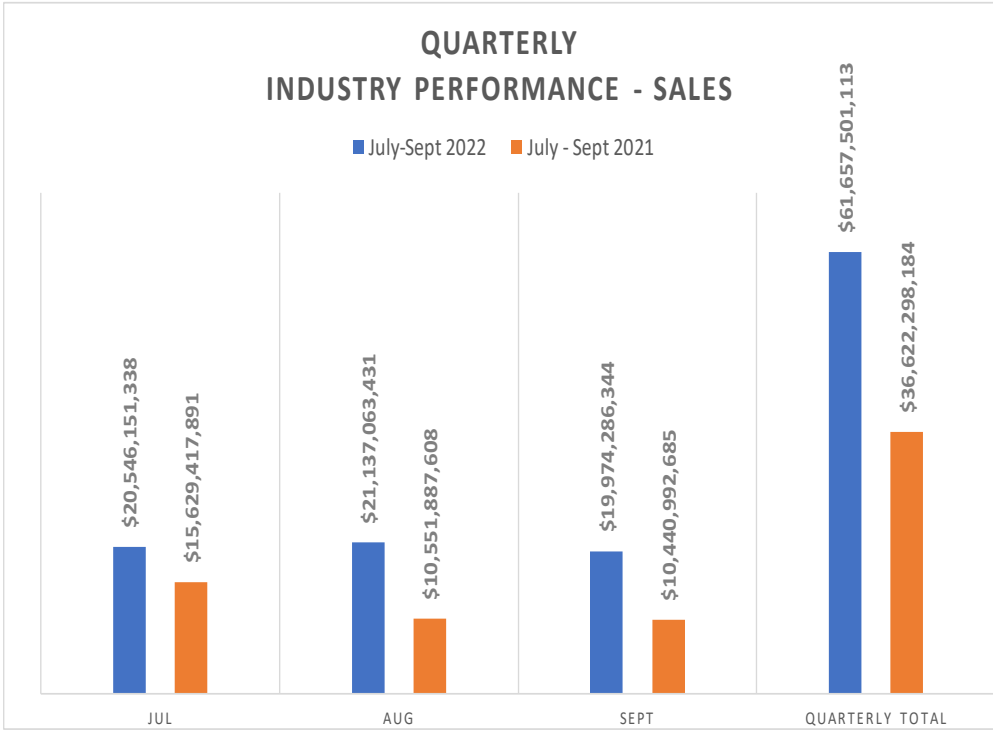
Total industry 2nd quarter (July – September 2022) sales amounted to J\$61.658 billion, exceeding the previous quarter - April to June 2022 - by 2.8%.

The industry has shown steady recovery from the pandemic. However, as the 2nd quarter coincides with the back-to-school period, typically during this quarter betting is lower, reflected by decreases in sales for both the lottery and betting sectors of 7.9% and 0.02% respectively. The gaming sector recorded a 9.9% increase. Sports betting increased by 12.6%, while for the racing promoter, local racing decreased by 11.9% and simulcast increased by 2.4% and bookmakers, recorded 10.5% and 19.5% decreases for local and overseas racing respectively. In the non-gaming lounge sector, Supreme Route - formerly Ice Jamaica Limited - generated 65% of the total sales in that category, contributing 46% of the revenue from this sector.

Gaming lounges in St. Andrew and St. James generated 68% and 25% of total sales respectively for Q2. Sales grew by 8.6% when compared to Q1. Gaming lounges and non-gaming lounges in hotels continue to show signs of steady recovery as the tourism sector re-opens, however, one (1) licensed location remains temporarily closed.

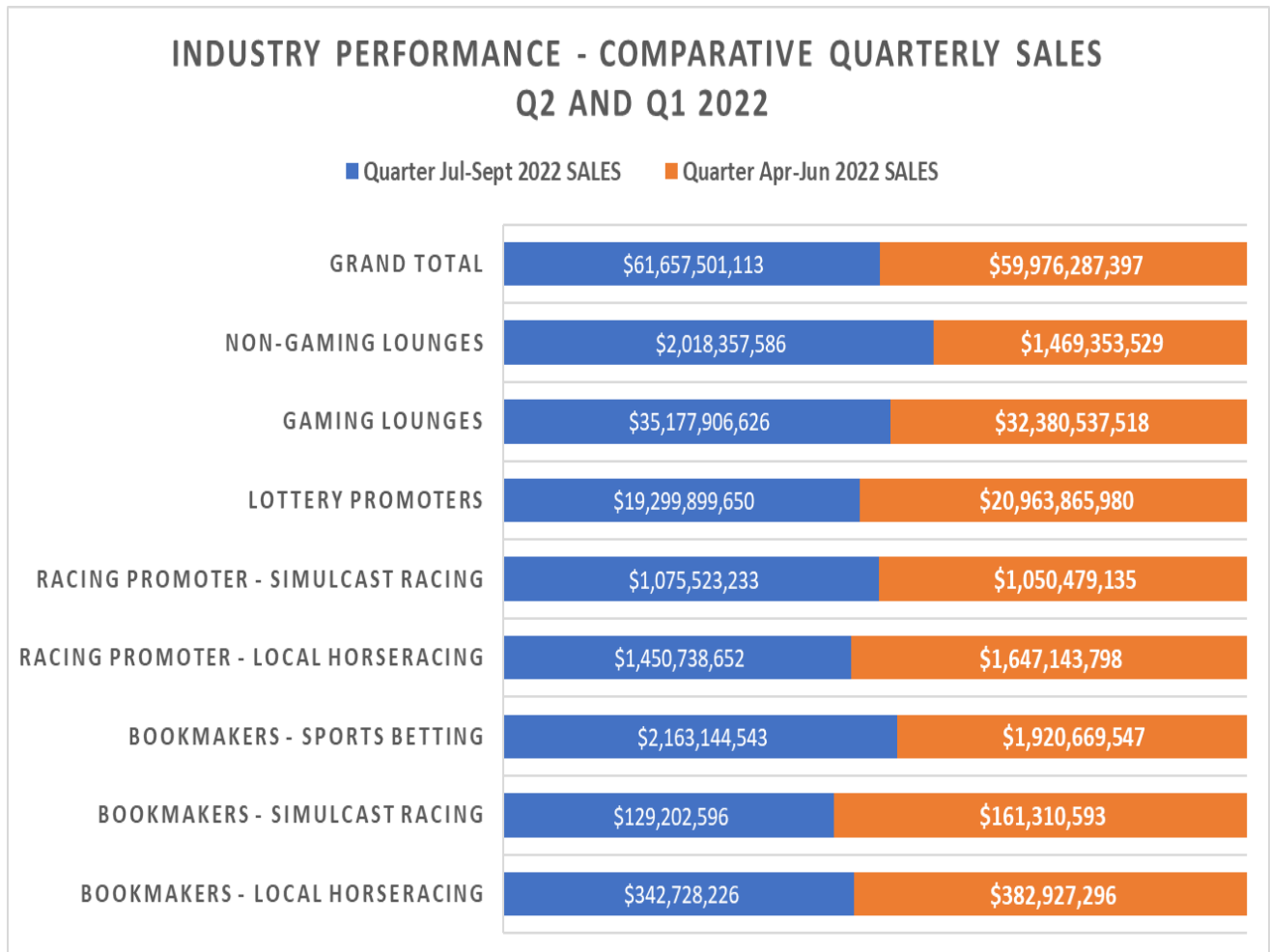


2022 | 2nd Quarter INDUSTRY PERFORMANCE – SALES (CONT'D)



2022 | 2nd Quarter INDUSTRY PERFORMANCE – SALES (CONT'D)

	2022			2021		
	SALES	PAYOUT	GROSS PROFIT	SALES	PAYOUT	GROSS PROFIT
JUL	20,546,151,338	17,784,741,663	2,761,409,675	15,629,417,891	13,193,198,214	2,436,219,677
AUG	21,137,063,431	18,459,339,846	2,677,723,585	10,551,887,608	8,846,320,060	1,705,567,548
SEPT	19,974,286,344	17,334,215,298	2,640,071,046	10,440,992,685	9,204,918,756	1,236,073,929
Q2 2022	61,657,501,113	53,578,296,807	8,079,204,306	36,622,298,184	31,244,437,030	5,377,861,154



2022 | 2nd Quarter

INDUSTRY PERFORMANCE – SALES (CONT'D)

July - Sept 2022	Sales \$	Payout/Prize Liability \$	Declared Gross Profit \$
Bookmakers			
Local Horseracing	342,728,226	219,902,453	122,825,773
Simulcast racing	129,202,596	89,426,129	39,776,467
Sports betting	2,163,144,543	1,815,682,883	347,461,660
Sub-total	2,635,075,366	2,125,011,465	510,063,901
Racing Promoter			
Local Horseracing	1,450,738,652	1,224,192,008	226,546,643
Simulcast racing	1,075,523,233	713,140,356	362,382,877
Sub-total	2,526,261,885	1,937,332,364	588,929,521
TOTAL - BETTING	5,161,337,251	4,062,343,829	1,098,993,421
LOTTERY	19,299,899,650	13,921,982,739	5,377,916,911
GAMING			
Gaming Lounges	35,177,906,626	33,659,443,260	1,518,463,366
Non-gaming lounges	2,018,357,586	1,934,526,978	83,830,608
Sub-total	37,196,264,212	35,593,970,238	1,602,293,974
GRAND TOTAL	61,657,501,113	53,578,296,807	8,079,204,306

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	14,071,700,850	10,245,716,860	3,825,983,990
GAMING			
Gaming Lounges	17,668,021,061	16,962,987,273	705,033,788
Non-gaming lounges	1,012,463,043	964,440,031	48,023,012
Sub-total	18,680,484,104	17,927,427,305	753,056,800

2022 | 2nd Quarter

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE

Government gains 23.2% in YTD revenue from gaming industry

SECTOR	Q2 2022 (\$)	Q2 2021 (\$)	CHANGE OVER Q1 2021
BETTING			
Bookmakers	58,083,016	56,164,350	3.4%
Racing Promoter	56,199,228	29,138,932	92.9%
Total Betting	114,282,244	85,303,283	34.0%
LOTTERY	2,309,072,678	1,828,552,125	26.3%
GAMING	159,924,173	78,040,247	104.9%
PRIZE COMPETITION/BINGO	-	3,625,000	-100.0%
TOTAL INDUSTRY GOVERNMENT REVENUE	2,583,279,095	1,995,520,655	29.5%

Total Government Revenue from betting, lottery and gaming reached \$2.583 billion, growing 29.7% over the comparative quarter of 2021 and declining by -18.96% from the 1st quarter (April - June 2022). The records indicate that annually for Q2, during which the back-to-school period falls, there is usually a decline in revenue when compared with Q1.

Betting Sector

Bookmakers' revenue increased by 3.4% and the racing promoter by 92.9% in Q2 as compared to Q1. All betting modes reported decreases in revenue, except sports betting and racing promoter simulcast horseracing which reported increases of 8.76% and 2.54% respectively. Government revenue from the betting sector was 4.42%. Bookmakers contributed 51% and the racing promoter reported 49% of total betting revenue.

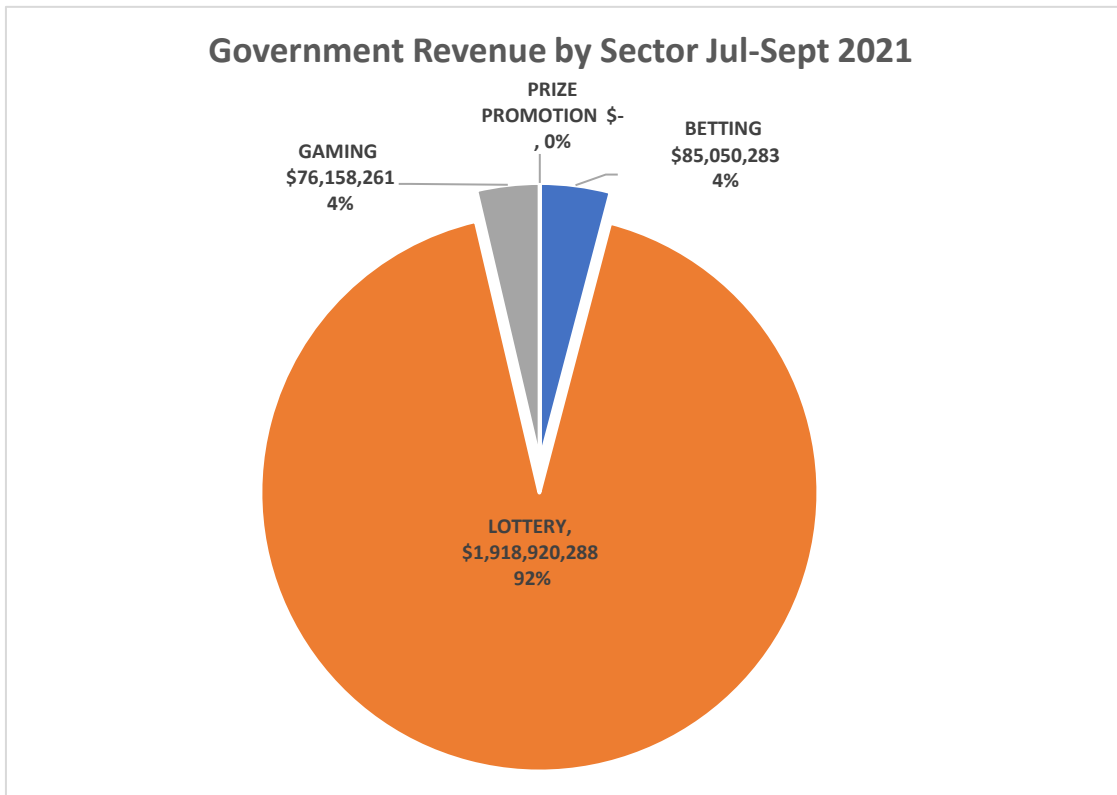
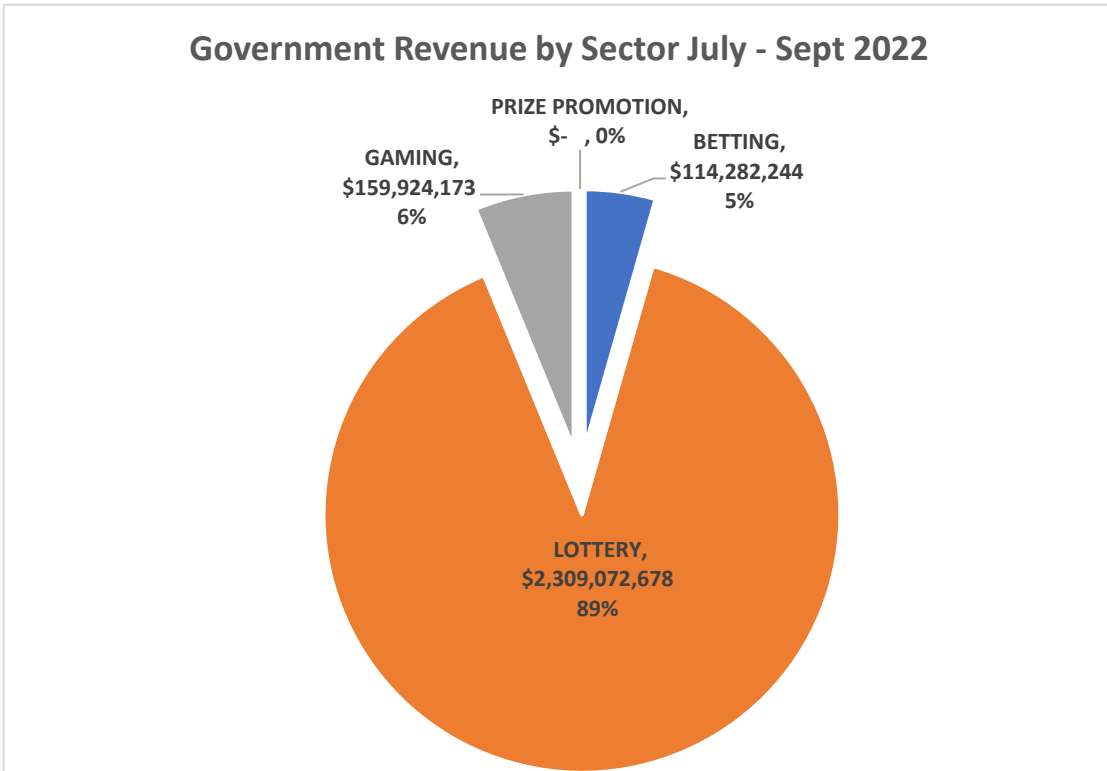
Gaming Sector

Gaming sector reported a 13.8% increase in government revenue Q2 as compared to Q1. Revenue from gaming lounges and non-gaming lounges increased by 13.76% and 13.69% respectively.

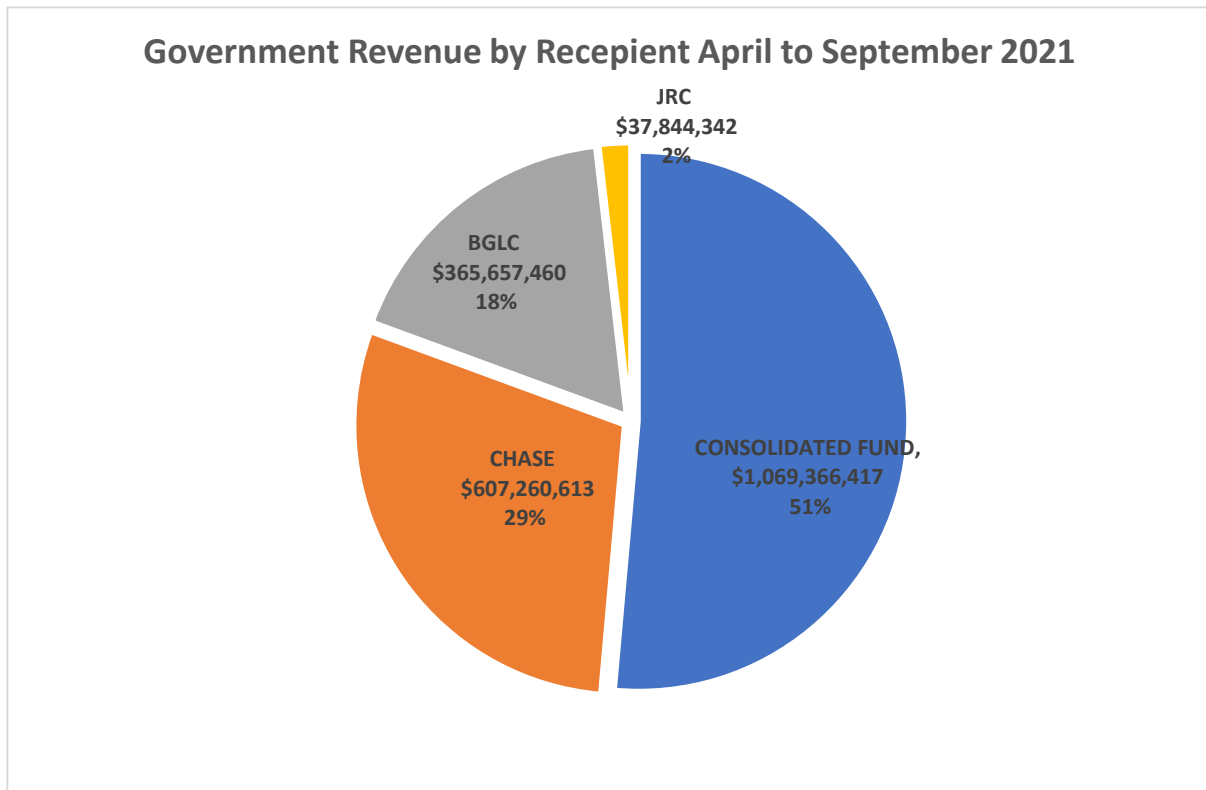
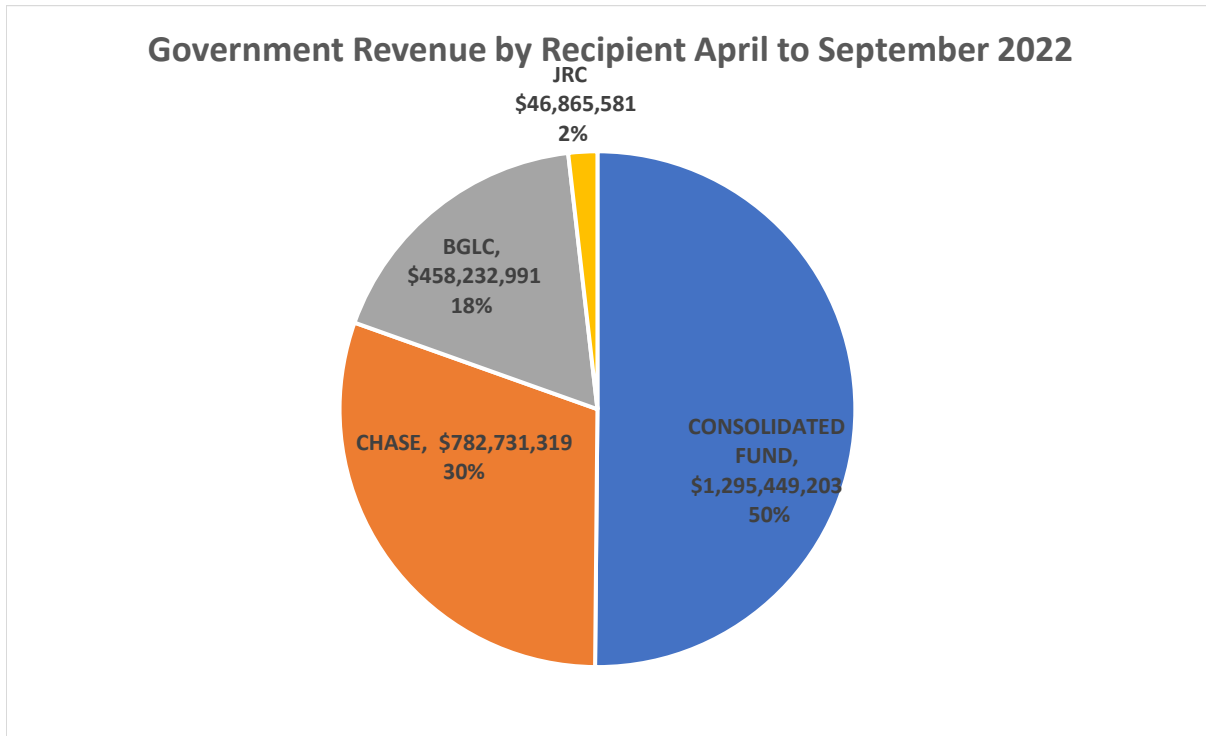
Lottery Sector

Government revenue from lottery declined in the second quarter by -7.9% as compared to Q1 2022 and contributed 89% of total Government revenue.

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)



INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)



INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

JULY - SEPTEMBER 2022	CONSOLIDATED FUND			BGLC	JRC	TOTAL July to September 2022
	TAJ	CHASE	TOTAL			
BETTING SECTOR						
<u>Bookmakers Levy</u>						
Local Horseracing	1,852,203	-	1,852,203	3,078,339	15,391,694	20,322,236
Simulcast racing	596,647	-	596,647	994,412	4,972,058	6,563,117
Sports betting	24,264,849	3,466,407	27,731,256	3,466,407	-	31,197,663
Unclaimed Winnings	-	-	-	-	-	-
Bookmakers' License Fees	-	-	-	-	-	-
SUB-TOTAL	26,713,699	3,466,407	30,180,106	7,539,157	20,363,752	58,083,016
<u>Racing Promoter Pool Betting Duty</u>						
Racing Promoter's License Fees	-	-	-	-	-	-
Local Horseracing	4,530,933	-	4,530,933	2,265,466	10,194,599	16,990,998
Simulcast racing	7,247,658	-	7,247,658	3,623,829	16,307,229	27,178,716
Unclaimed Winnings	-	-	-	12,029,514	-	12,029,514
SUB-TOTAL	11,778,590	-	11,778,590	17,918,809	26,501,828	56,199,228
TOTAL BETTING	38,492,290	3,466,407	41,958,697	25,457,967	46,865,581	114,282,244
LOTTERY SECTOR						
Lottery Tax	1,015,296,330	692,871,574	1,708,167,904	322,418,609	-	2,030,586,513
Lottery Winnings Levy	137,647,281	-	137,647,281	-	-	137,647,281
Unclaimed Winnings	-	70,419,392	70,419,392	70,419,492	-	140,838,884
Lottery Licence Fees	-	-	-	-	-	-
TOTAL LOTTERY	1,152,943,611	763,290,966	1,916,234,576	392,838,101	-	2,309,072,678
GAMING SECTOR						
Gaming Lounges	98,538,297	15,159,738	113,698,036	37,899,345	-	151,597,381
Non-gaming lounges	5,475,006	814,208	6,289,214	2,037,578	-	8,326,792
Licence fees	-	0	0	-	-	0
Technical Service Provider	-	-	-	-	-	-
TOTAL GAMING	104,013,303	15,973,946	119,987,250	39,936,923	-	159,924,173
Prize Competition	-	-	-	-	-	0
Charitable Bingo Licence Fees	0	-	-	-	-	0
INDUSTRY TOTAL	1,295,449,203	782,731,319	2,078,180,523	458,232,991	46,865,581	2,583,279,095

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

JULY - SEPTEMBER 2021	CONSOLIDATED FUND			BGLC	JRC	TOTAL July to September 2021
	TAJ	CHASE	TOTAL			
BETTING SECTOR						
<i>Bookmakers Levy</i>						
Local Horseracing	1,745,877	-	1,745,877	2,901,528	14,834,403	19,481,807
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	-	-	0	0	-	0
Bookmakers' License Fees	-	-	0	0	-	0
SUB-TOTAL	19,997,301	2,511,149	22,508,450	6,534,979	20,445,913	49,489,342
<i>Racing Promoter Pool Betting Duty</i>						
Racing Promoter's License Fees	-	-	0	0	0	0
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	-	-	0	6,675,009	-	6,675,009
SUB-TOTAL	7,732,635	-	7,732,635	10,429,876	17,398,430	35,560,941
TOTAL BETTING	27,729,936	2,511,149	30,241,085	16,964,855	37,844,342	85,050,283
LOTTERY SECTOR						
Lottery Tax	867,915,812	527,753,705	1,395,669,517	260,267,606	-	1,655,937,122
Lottery Winnings Levy	124,214,690	-	124,214,690	-	-	124,214,690
Unclaimed Winnings	-	69,384,238	69,384,238	69,384,238	-	138,768,476
Lottery Licence Fees	-	-	0	0	-	0
TOTAL LOTTERY	992,130,502	597,137,943	1,589,268,444	329,651,844	-	1,918,920,288
GAMING SECTOR						
Gaming Lounges	45,827,196	7,050,338	52,877,534	17,625,845	-	70,503,379
Non-gaming lounges	3,678,782	561,184	4,239,966	1,414,916	-	5,654,883
Licence fees	0	0	0	0	-	0
Technical Service Provider	0	0	0	0	-	0
TOTAL GAMING	49,505,979	7,611,522	57,117,500	19,040,761	0	76,158,261
Prize Competition	-	-	-	0	-	0
Charitable Bingo Licence Fees	0	0	0	0	0	0
INDUSTRY TOTAL	1,069,366,417	607,260,613	1,676,627,030	365,657,460	37,844,342	2,080,128,832