



# **GAMING INDUSTRY STATISTICS QUARTERLY HIGHLIGHTS**

**Q4 2022  
JANUARY 2023 TO MARCH 2023**

# QUARTERLY GAMING INDUSTRY HIGHLIGHTS

## Reporting Period: 4th Quarter January to March 2023

This document provides an overview, key highlights and statistics for Jamaica's Gaming Industry for the quarter January 2023 to March 2023.

Information presented is categorized by sector and includes data reported by operators who are licensed and regulated by the Betting Gaming and Lotteries Commission.

The Betting Sector encompasses bookmaking, pari-mutual wagering and fixed odd betting on horseracing (both local and simulcast) as well as sports betting inclusive of online casino-type games and poker games.

The Lottery Sector includes sales of lottery games classified as declared lottery, daily numbers game, or instant lottery.

The Gaming Sector covers gaming machines such as slots and locally-made gaming machines and technical service providers.

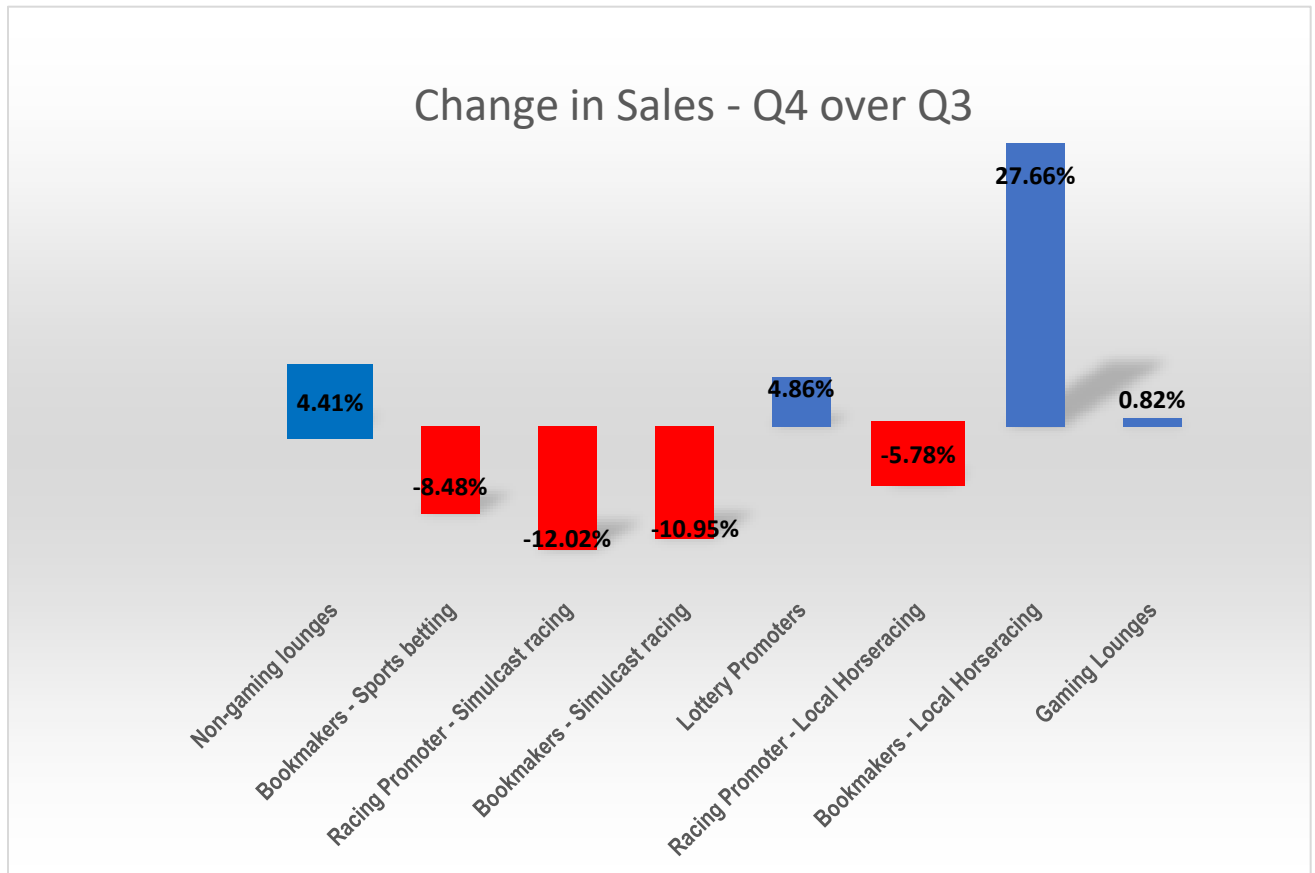
**Data presented is correct at the time of publication. However, it may be adjusted without notice.**

## Jan 2023 – March 2023 | Fourth Quarter INDUSTRY PERFORMANCE – SALES

The total sales for the industry in the fourth quarter of January 2023 to March 2023 amounted to J\$61.459 billion. This represents a decrease of 1.35% when compared to the previous quarter (October 2022 to December 2022), which generated sales of \$60.642 billion.

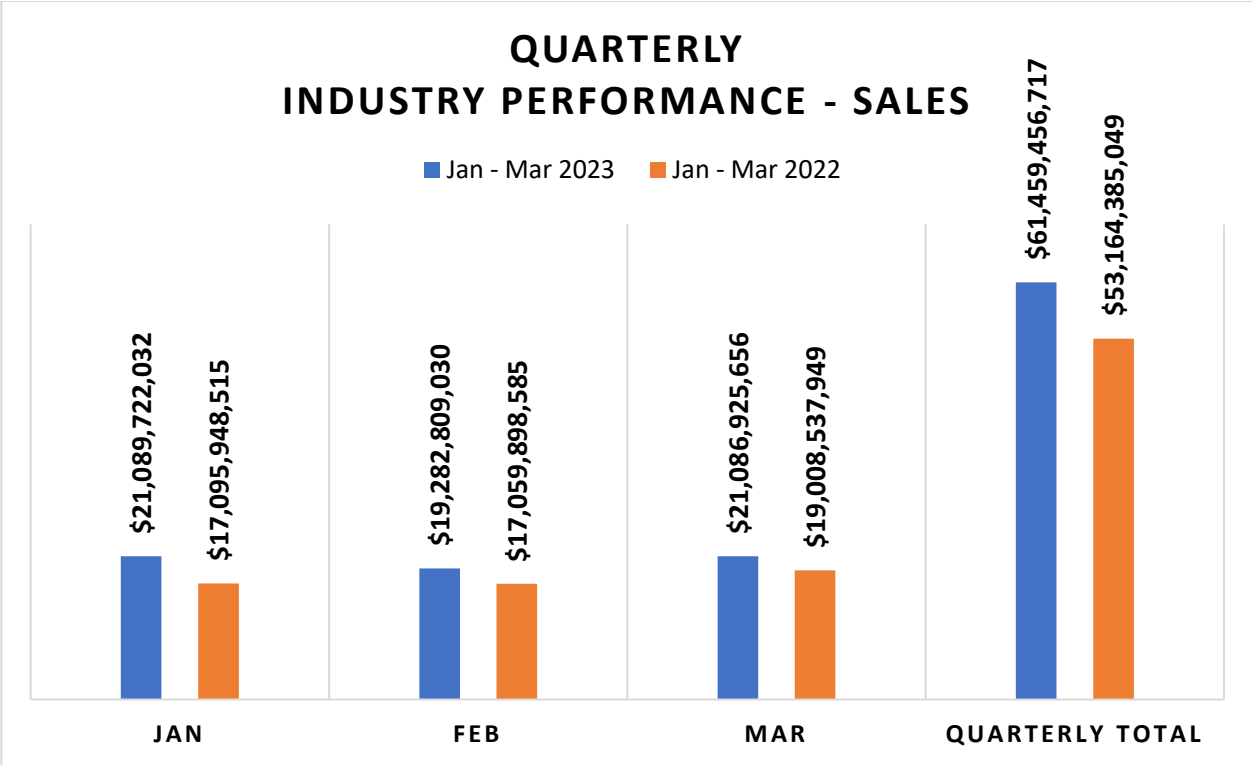
Among the sectors, the gaming sector experienced a 0.98% increase in sales, while the lottery sector recorded a significant increase of 4.86%. However, the betting sector saw a decrease of 6.05% in sales. Specifically, sales in the sports betting segment decreased by 8.48%, and simulcast horseracing sales declined by 10.95%. In contrast, local horseracing recorded an increase of 27.66%. On the other hand, the racing promoter experienced a decrease of 5.78% and 12.02% in local racing and simulcast sales respectively.

In the non-gaming sector, Supreme Route, operating seven (7) locations with a total of seventy (70) gaming machines, generated 63.91% of the total sales and contributed 38.37% of the revenue.



Gaming lounges in St. Andrew and St. James accounted for 64.15% and 28.73% of total sales, respectively, in the fourth quarter. Overall sales increased by 0.98% compared to the previous quarter (Q3).

## 2023 vs 2022 | Fourth Quarter INDUSTRY PERFORMANCE – Comparative SALES (CONT'D)



## Jan 2023 – March 2023 | Fourth Quarter INDUSTRY PERFORMANCE – SALES (CONT'D)

|                | 2023                  |                       |                      | 2022                  |                       |                      |
|----------------|-----------------------|-----------------------|----------------------|-----------------------|-----------------------|----------------------|
|                | SALES                 | PAYOUT                | GROSS PROFIT         | SALES                 | PAYOUT                | GROSS PROFIT         |
| JAN            | 21,089,722,032        | 18,054,338,412        | 3,035,383,619        | 17,095,948,515        | 14,342,881,702        | 2,753,066,813        |
| FEB            | 19,282,809,030        | 16,712,796,637        | 2,570,012,393        | 17,059,898,585        | 14,717,014,432        | 2,342,884,153        |
| MAR            | 21,086,925,656        | 18,090,080,682        | 2,996,844,974        | 19,008,537,949        | 16,124,985,995        | 2,883,551,954        |
| <b>Q4 2023</b> | <b>61,459,456,717</b> | <b>52,857,215,731</b> | <b>8,602,240,987</b> | <b>53,164,385,049</b> | <b>45,184,882,128</b> | <b>7,979,502,921</b> |

### INDUSTRY PERFORMANCE - QUARTERLY SALES: Q3 VS Q4

■ January -March 2023 Sales \$

■ October - December 2022 Sales \$

|                                   |                |                |
|-----------------------------------|----------------|----------------|
| GRAND TOTAL                       | 61,459,456,717 | 60,641,773,742 |
| SUB-TOTAL                         | 36,171,023,847 | 35,819,888,006 |
| NON-GAMING LOUNGES                | 1,711,909,407  | 1,639,530,163  |
| GAMING LOUNGES                    | 34,459,114,441 | 34,180,357,843 |
| LOTTERY                           | 18,916,184,250 | 18,038,969,190 |
| TOTAL - BETTING                   | 6,372,248,620  | 6,782,916,546  |
| SUB-TOTAL                         | 2,563,911,433  | 2,799,536,397  |
| RACING PROMOTER-SIMULCAST RACING  | 1,041,582,503  | 1,183,903,669  |
| RACING PROMOTER-LOCAL HORSERACING | 1,522,328,930  | 1,615,632,728  |
| SUB-TOTAL                         | 3,808,337,187  | 3,983,380,149  |
| BOOKMAKERS-SPORTS BETTING         | 3,110,186,556  | 3,398,264,662  |
| BOOKMAKERS-SIMULCAST RACING       | 112,544,216    | 126,379,959    |
| BOOKMAKERS-LOCAL HORSERACING      | 585,606,416    | 458,735,529    |

## Jan 2023 – March 2023 | Fourth Quarter

### INDUSTRY PERFORMANCE - GOVERNMENT REVENUE

**Government gains 15.10% in YTD when compared to 2021/2022 revenue from gaming industry**

| SECTOR                                   | Q4 2023 (\$)         | Q4 2022 (\$M)        | CHANGE OVER Q4 2022 |
|--|----------------------|----------------------|---------------------|
| <b>BETTING</b>                           |                      |                      |                     |
| Bookmakers                               | 75,534,834           | 61,538,429           | 22.7%               |
| Racing Promoter                          | 54,556,598           | 53,968,622           | 1.1%                |
| <b>Total Betting</b>                     | <b>130,091,432</b>   | <b>115,507,051</b>   | 12.6%               |
| <b>LOTTERY</b>                           | <b>2,495,349,160</b> | <b>2,438,339,182</b> | 2.3%                |
| <b>GAMING</b>                            | <b>159,017,487</b>   | <b>125,746,144</b>   | 26.5%               |
| <b>PRIZE COMPETITION/BINGO</b>           | <b>2,805,000</b>     | <b>2,466,250</b>     | 13.7%               |
| <b>TOTAL INDUSTRY GOVERNMENT REVENUE</b> | <b>2,787,263,080</b> | <b>2,682,058,627</b> | 3.9%                |

Total Government Revenue from betting, lottery and gaming reached \$2.787 billion, showing a growth of 3.9% over the comparative quarter of 2022.

#### Betting Sector

The bookmakers' revenue increased by 22.7% and the Racing Promoter also recorded a slight increase of 1.1% Q4 of 2022 compared to the same period in 2021. All modes of betting reported government revenue growth. Bookmakers contributed 58% of the total betting revenue, while the Racing Promoter accounted for 42%.

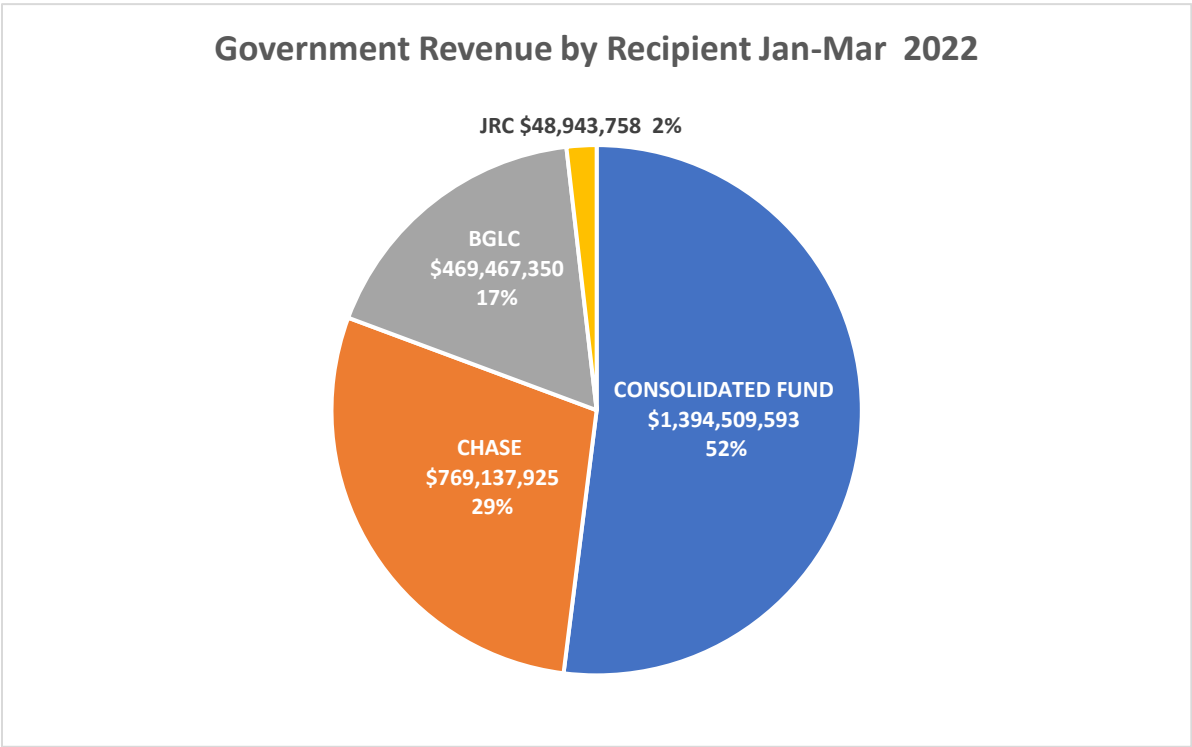
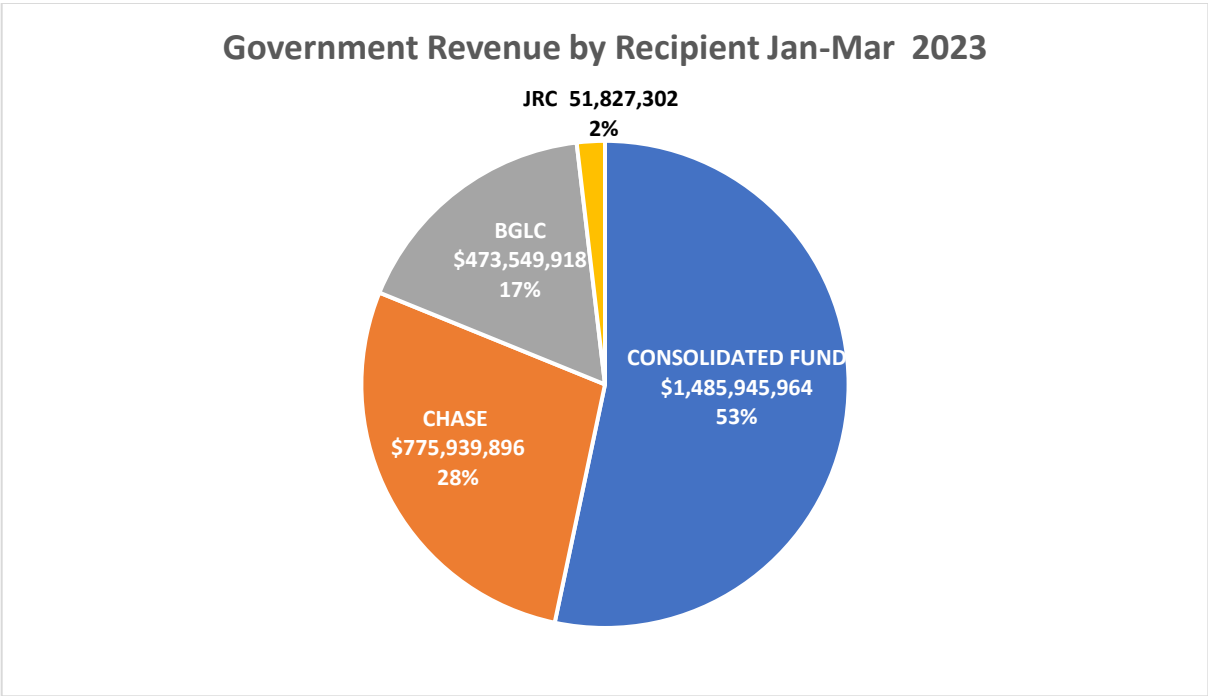
#### Gaming Sector

The gaming sector witnessed a notable decrease of 27.55% in government revenue in Q4 of 2023 (January to March) compared to Q3 of 2022 (October to December). Revenue from Gaming lounges decreased by 31.15%, while non-gaming lounges saw a modest increase of 0.84%.

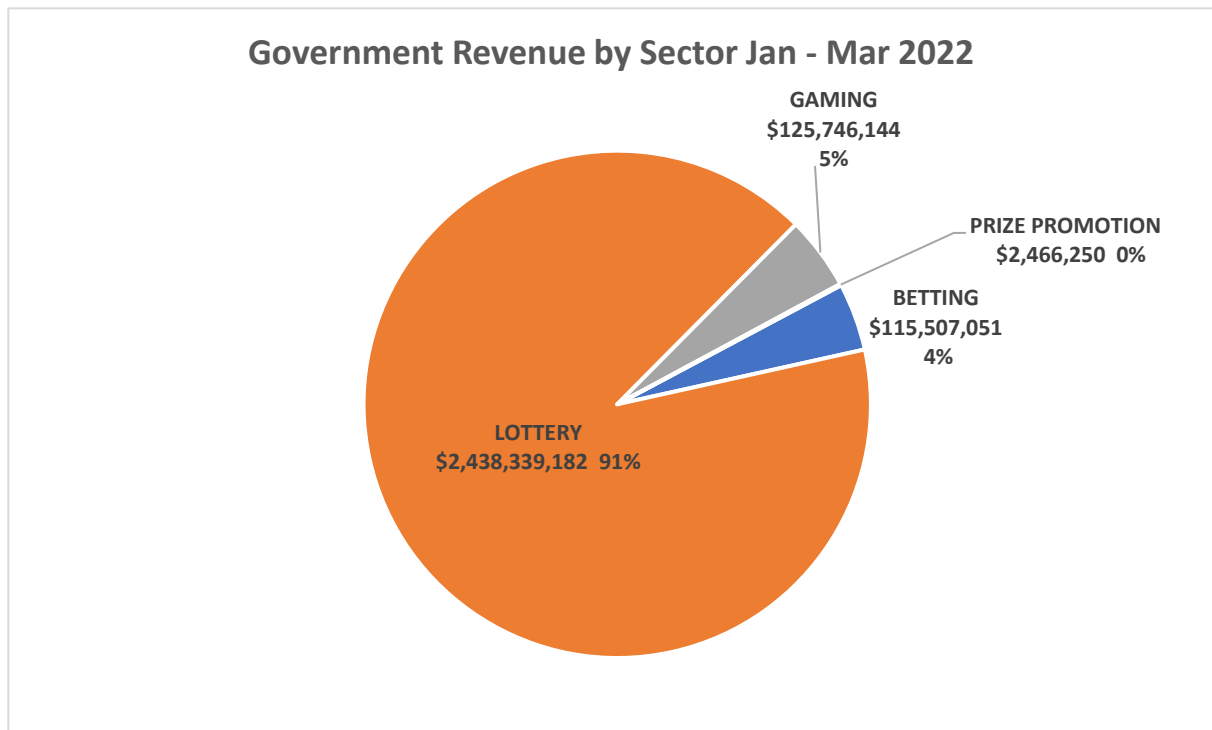
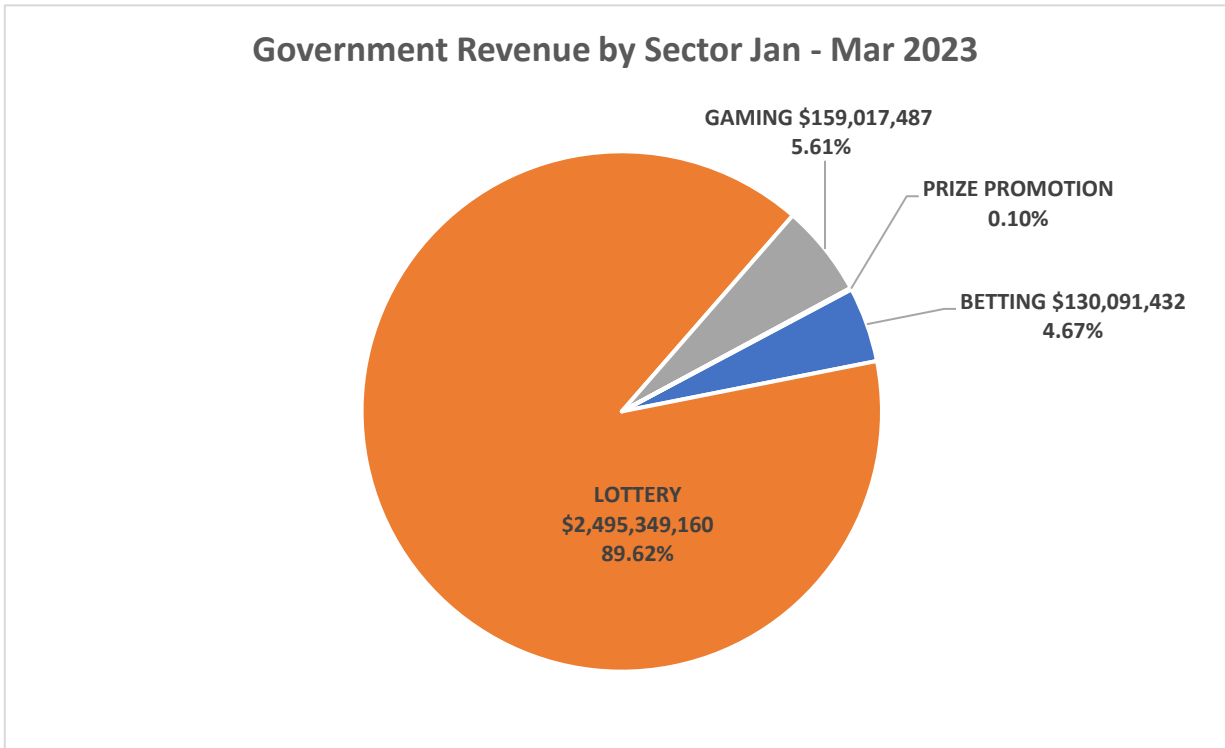
#### Lottery Sector

Government revenue from lottery sector increased by 2.3% in the fourth quarter of 2023 compared to Q3 of 2022, and it contributed 89.62% of total Government revenue.

# INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)



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





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

| JANUARY - MARCH 2023                            | CONSOLIDATED FUND    |                    |                      | BGLC               | JRC               | TOTAL<br>January to March<br>2023 |
|---|----------------------|--------------------|----------------------|--------------------|-------------------|-----------------------------------|
|   | TAJ                  | CHASE              | TOTAL                |                    |                   |                                   |
| <b>BETTING SECTOR</b>                           |                      |                    |                      |                    |                   |                                   |
| <b><u>Bookmakers Levy</u></b>                   |                      |                    |                      |                    |                   |                                   |
| Local Horseracing                               | 2,430,002            | -                  | 2,430,002            | 4,039,337          | 18,625,299        | 25,094,638                        |
| Simulcast racing                                | 594,793              | -                  | 594,793              | 991,322            | 4,956,610         | 6,542,725                         |
| Sports betting                                  | 34,119,923           | 4,874,275          | 38,994,197           | 4,874,275          | -                 | 43,868,472                        |
| Unclaimed Winnings                              | -                    | -                  | -                    | -                  | -                 | -                                 |
| Bookmakers' License Fees                        | -                    | -                  | -                    | 29,000             | -                 | 29,000                            |
| <b>SUB-TOTAL</b>                                | <b>37,144,718</b>    | <b>4,874,275</b>   | <b>42,018,993</b>    | <b>9,933,933</b>   | <b>23,581,909</b> | <b>75,534,834</b>                 |
| <b><u>Racing Promoter Pool Betting Duty</u></b> |                      |                    |                      |                    |                   |                                   |
| Racing Promoter's License Fees                  | -                    | -                  | -                    | 29,000             | -                 | 29,000                            |
| Local Horseracing                               | 5,544,694            | -                  | 5,544,694            | 2,772,347          | 12,475,563        | 20,792,604                        |
| Simulcast racing                                | 7,008,814            | -                  | 7,008,814            | 3,504,407          | 15,769,831        | 26,283,052                        |
| Unclaimed Winnings                              | -                    | -                  | -                    | 7,451,942          | -                 | 7,451,942                         |
| <b>SUB-TOTAL</b>                                | <b>12,553,508</b>    | <b>-</b>           | <b>12,553,508</b>    | <b>13,757,696</b>  | <b>28,245,394</b> | <b>54,556,598</b>                 |
| <b>TOTAL BETTING</b>                            | <b>49,698,226</b>    | <b>4,874,275</b>   | <b>54,572,501</b>    | <b>23,691,629</b>  | <b>51,827,302</b> | <b>130,091,432</b>                |
| <b>LOTTERY SECTOR</b>                           |                      |                    |                      |                    |                   |                                   |
| Lottery Tax                                     | 1,130,632,121        | 690,448,946        | 1,821,081,067        | 340,665,967        | -                 | 2,161,747,034                     |
| Lottery Winnings Levy                           | 202,791,961          | -                  | 202,791,961          | -                  | -                 | 202,791,961                       |
| Unclaimed Winnings                              | -                    | 65,260,295         | 65,260,295           | 65,260,295         | -                 | 130,520,590                       |
| Lottery Licence Fees                            | 202,500              | -                  | 202,500              | 87,075             | -                 | 289,575                           |
| <b>TOTAL LOTTERY</b>                            | <b>1,333,626,583</b> | <b>755,709,241</b> | <b>2,089,335,823</b> | <b>406,013,337</b> | <b>-</b>          | <b>2,495,349,160</b>              |
| <b>GAMING SECTOR</b>                            |                      |                    |                      |                    |                   |                                   |
| Gaming Lounges                                  | 94,896,200           | 14,599,415         | 109,495,615          | 36,498,538         | -                 | 145,994,154                       |
| Non-gaming lounges                              | 4,859,955            | 756,965            | 5,616,921            | 1,892,413          | -                 | 7,509,333                         |
| Licence fees                                    | 2,865,000            | 0                  | 2,865,000            | 2,649,000          | -                 | 5,514,000                         |
| Technical Service Provider                      | -                    | -                  | -                    | -                  | -                 | -                                 |
| <b>TOTAL GAMING</b>                             | <b>102,621,155</b>   | <b>15,356,381</b>  | <b>117,977,536</b>   | <b>41,039,951</b>  | <b>-</b>          | <b>159,017,487</b>                |
| Prize Competition                               | -                    | -                  | -                    | 2,785,000          | -                 | 2,785,000                         |
| Charitable Bingo Licence Fees                   | 0                    | -                  | -                    | 20,000             | -                 | 20,000                            |
| <b>INDUSTRY TOTAL</b>                           | <b>1,485,945,964</b> | <b>775,939,896</b> | <b>2,261,885,860</b> | <b>473,549,918</b> | <b>51,827,302</b> | <b>2,787,263,080</b>              |

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

| JANUARY - MARCH 2022                            | CONSOLIDATED FUND    |                    |                      | BGLC               | JRC               | TOTAL<br>January to March<br>2022 |
|---|----------------------|--------------------|----------------------|--------------------|-------------------|-----------------------------------|
|   | TAJ                  | CHASE              | TOTAL                |                    |                   |                                   |
| <b>BETTING SECTOR</b>                           |                      |                    |                      |                    |                   |                                   |
| <b><u>Bookmakers Levy</u></b>                   |                      |                    |                      |                    |                   |                                   |
| 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                        | -                    | -                  | -                    | 3,750              | -                 | 3,750                             |
| <b>SUB-TOTAL</b>                                | <b>26,879,944</b>    | <b>3,482,381</b>   | <b>30,362,325</b>    | <b>10,357,452</b>  | <b>20,818,651</b> | <b>61,538,429</b>                 |
| <b><u>Racing Promoter Pool Betting Duty</u></b> |                      |                    |                      |                    |                   |                                   |
| Racing Promoter's License Fees                  | -                    | -                  | -                    | 153,000            | -                 | 153,000                           |
| 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                         |
| <b>SUB-TOTAL</b>                                | <b>12,500,047</b>    | <b>-</b>           | <b>12,500,047</b>    | <b>13,190,468</b>  | <b>28,125,106</b> | <b>53,968,622</b>                 |
| <b>TOTAL BETTING</b>                            | <b>39,379,992</b>    | <b>3,482,381</b>   | <b>42,862,373</b>    | <b>23,547,920</b>  | <b>48,943,758</b> | <b>115,507,051</b>                |
| <b>LOTTERY SECTOR</b>                           |                      |                    |                      |                    |                   |                                   |
| Lottery Tax                                     | 1,120,089,112        | 683,019,741        | 1,803,108,852        | 336,831,704        | -                 | 2,139,940,557                     |
| Lottery Winnings Levy                           | 157,038,747          | -                  | 157,038,747          | -                  | -                 | 157,038,747                       |
| Unclaimed Winnings                              | -                    | 70,631,026         | 70,631,026           | 70,631,027         | -                 | 141,262,053                       |
| Lottery Licence Fees                            | -                    | -                  | -                    | 97,825             | -                 | 97,825                            |
| <b>TOTAL LOTTERY</b>                            | <b>1,277,127,859</b> | <b>753,650,767</b> | <b>2,030,778,626</b> | <b>407,560,556</b> | <b>-</b>          | <b>2,438,339,182</b>              |
| <b>GAMING SECTOR</b>                            |                      |                    |                      |                    |                   |                                   |
| 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                    | 5,727,680          | -                 | 5,727,680                         |
| Technical Service Provider                      | -                    | -                  | -                    | -                  | -                 | -                                 |
| <b>TOTAL GAMING</b>                             | <b>78,001,743</b>    | <b>12,004,778</b>  | <b>90,006,520</b>    | <b>35,739,624</b>  | <b>-</b>          | <b>125,746,144</b>                |
| Prize Competition                               | -                    | -                  | -                    | 2,456,250          | -                 | 2,456,250                         |
| Charitable Bingo Licence Fees                   | 0                    | -                  | -                    | 10,000             | -                 | 10,000                            |
| <b>INDUSTRY TOTAL</b>                           | <b>1,394,509,593</b> | <b>769,137,925</b> | <b>2,163,647,519</b> | <b>469,314,350</b> | <b>48,943,758</b> | <b>2,682,058,627</b>              |