



GAMING INDUSTRY STATISTICS - QUARTERLY HIGHLIGHTS

Q1 2024 – April 2023 TO June 2023

QUARTERLY GAMING INDUSTRY HIGHLIGHTS

Reporting Period: 1st Quarter April to June 2023

This document provides an overview, key highlights and statistics for Jamaica's gaming industry for the quarter of April 2023 to June 2023.

Information presented is categorized by sector and includes data reported by operators, 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 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.

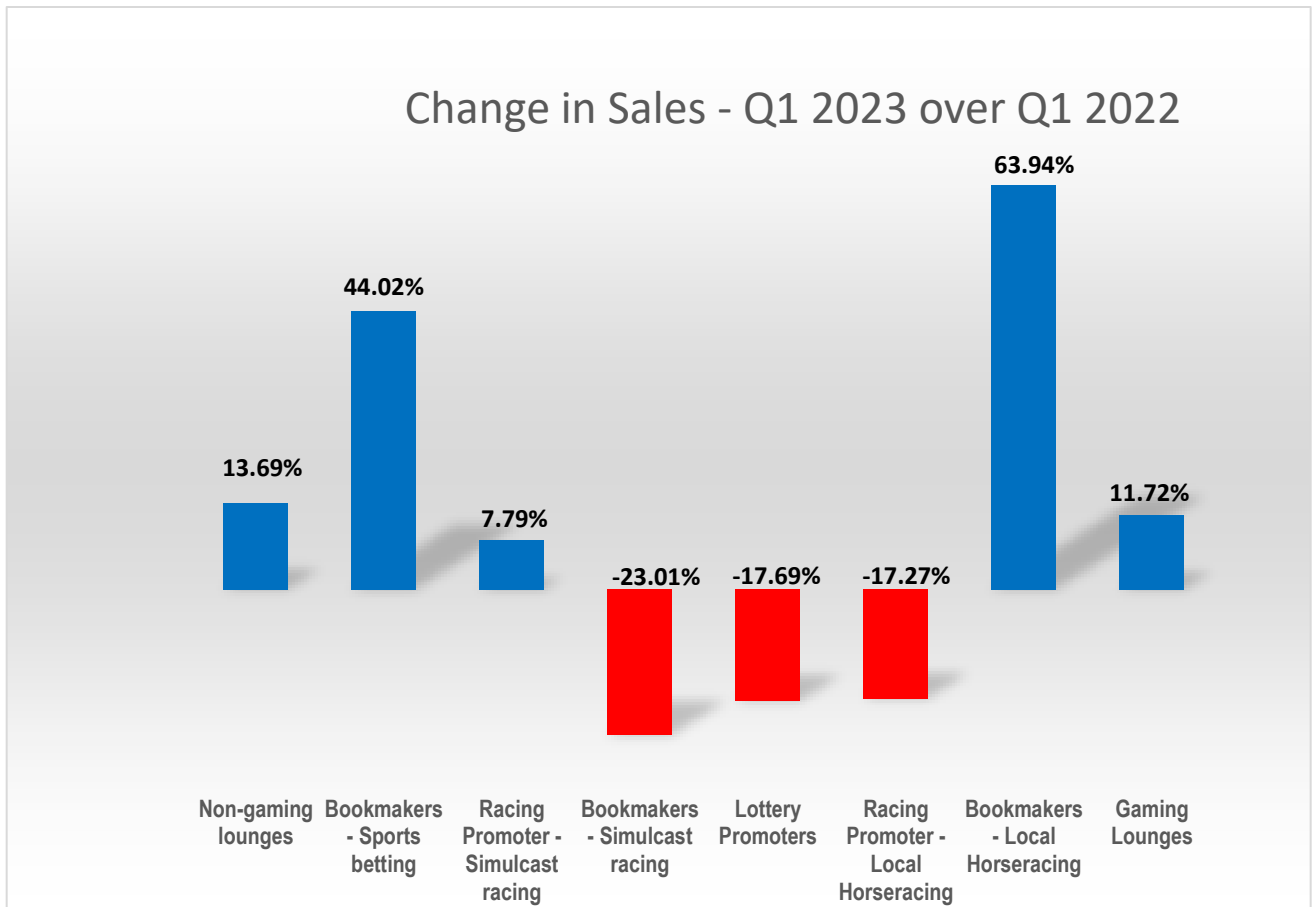
Data presented is correct at the time of publication. However, it may be adjusted without notice.

2024 | First Quarter INDUSTRY PERFORMANCE – SALES

The total sales for the industry in the first quarter of April 2023 to June 2023 amounted to J\$61. billion. This represents a decrease of .74% when compared to the previous quarter (January 2023 to March 2023), which generated sales of \$61.574 billion.

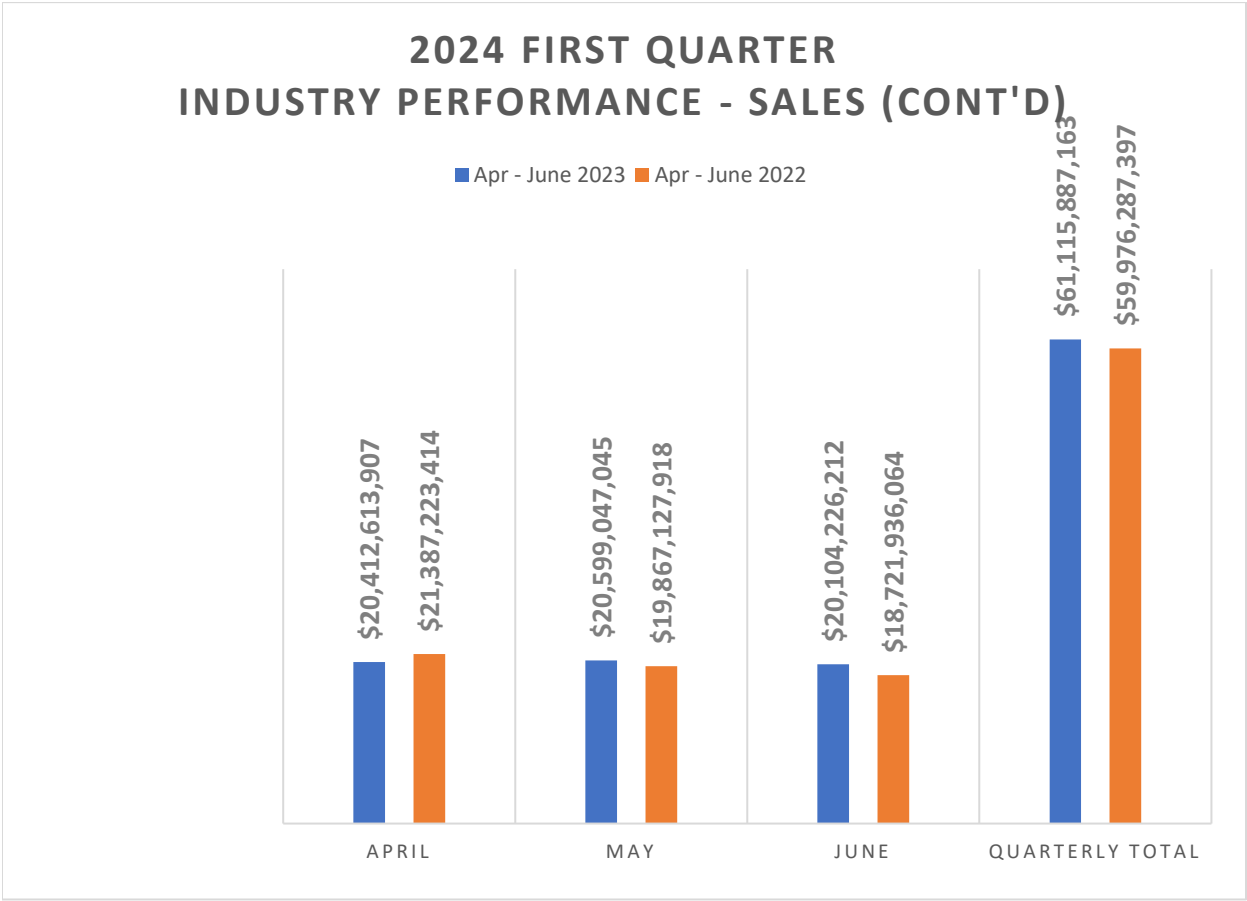
Among the sectors, the gaming and betting sectors experienced increases of 11.81% and 16.48% respectively in sales, while the lottery sector recorded a significant decrease of -17.69%. Specifically, bookmakers’ sales in the sports betting segment increased by 44.02%, and simulcast horseracing sales declined by 23.01%. In contrast, local horseracing recorded an increase of 63.94%. On the other hand, the racing promoter experienced a decrease of -17.27% for local racing and a 7.79% in local racing sales.

In the non-gaming sector, Supreme Route, operating seven (7) locations with a total of seventy (70) gaming machines, generated 64.98% of the total sales and contributed 38.76% of the revenue.



Gaming lounges in St. Andrew and St. James accounted for 57.72% and 23.37% of total sales, respectively, in the first quarter. Overall sales increased by 11.81% compared to the previous quarter (Q4).

2024 | First Quarter INDUSTRY PERFORMANCE – SALES (CONT'D)



2024 | First Quarter INDUSTRY PERFORMANCE – SALES (CONT'D)

	2023			2022		
	SALES	PAYOUT	GROSS PROFIT	SALES	PAYOUT	GROSS PROFIT
APR	20,412,613,907	17,954,294,873	2,458,319,034	21,387,223,414	18,251,062,916	3,136,160,499
MAY	20,599,047,045	18,174,848,646	2,424,198,399	19,867,127,918	16,876,644,947	2,990,482,972
JUN	20,104,226,212	17,374,547,946	2,729,678,266	18,721,936,064	16,060,617,625	2,661,318,439
Q1 2024	61,115,887,163	53,503,691,464	7,612,195,700	59,976,287,397	51,188,325,488	8,787,961,909

INDUSTRY PERFORMANCE - COMPARATIVE QUARTERLY SALES Q1 2024 VS Q 1 2023

■ Quarter Apr-Jun 2023 SALES
 ■ Quarter Apr-Jun 2022 SALES

GRAND TOTAL	61,115,887,163	59,976,287,397
NON-GAMING LOUNGES	\$1,670,485,262	\$1,469,353,529
GAMING LOUNGES	\$36,175,891,389	\$32,380,537,518
LOTTERY PROMOTERS	\$17,256,296,750	\$20,963,865,980
RACING PROMOTER - SIMULCAST RACING	\$1,132,361,577	\$1,050,479,135
RACING PROMOTER - LOCAL HORSERACING	\$1,362,633,040	\$1,647,143,798
BOOKMAKERS - SPORTS BETTING	\$2,766,238,439	\$1,920,669,547
BOOKMAKERS - SIMULCAST RACING	\$124,191,925	\$161,310,593
BOOKMAKERS - LOCAL HORSERACING	\$627,788,782	\$382,927,296

2024 | First Quarter

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE

Government loss -7.6% in YTD when compared to 2022/2023 revenue from gaming industry

SECTOR	Q1 2024	Q1 2023	CHANGE OVER Q1 2023
BETTING			
Bookmakers	81,049,708	66,736,046	21.45%
Racing Promoter	77,808,588	71,589,214	8.69%
Total Betting	158,858,296	138,325,260	14.84%
LOTTERY	2,454,823,826	2,708,986,453	-9.38%
GAMING	326,755,453	335,652,701	-2.65%
PRIZE COMPETITION/BINGO	3,875,000	3,670,000	5.59%
TOTAL INDUSTRY GOVERNMENT REVENUE	2,944,312,575	3,186,634,414	-7.6%

Total Government Revenue from betting, lottery and gaming reached \$2.944 billion, showing a decline of 7.6% over the comparative quarter of 2022.

Betting Sector

The bookmakers' revenue increased by 21.45% and the Racing Promoter recorded an increase of 8.69% Q1 of 2024 compared to the same period in 2023. Both the bookmakers and racing promoter reported government revenue growth. Bookmakers contributed 51% of the total betting revenue, while the Racing Promoter accounted for 49%.

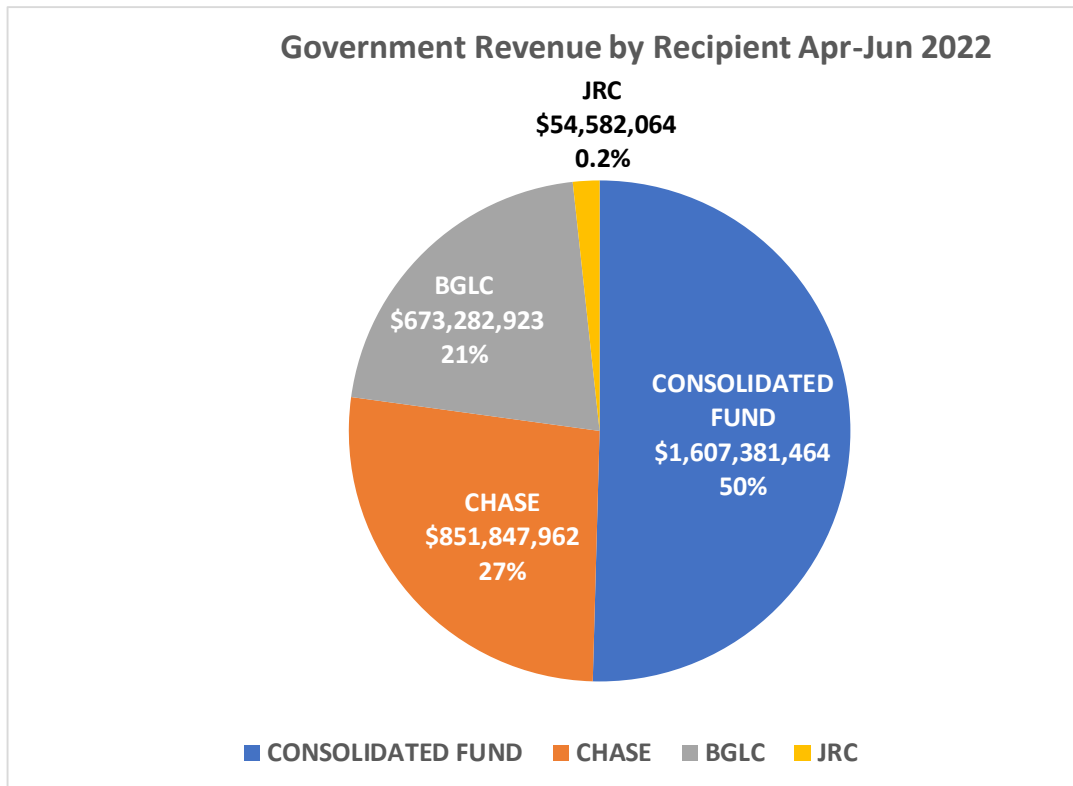
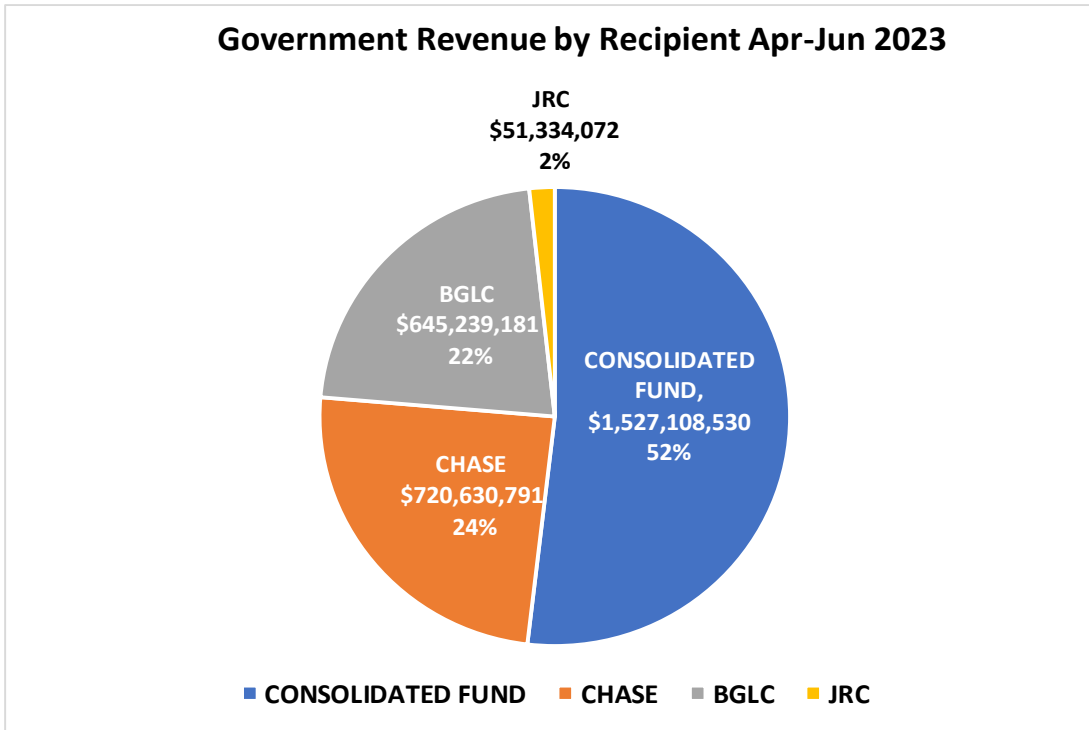
Gaming Sector

The gaming sector recorded a decrease of -2.65% in government revenue in Q1 of 2024 (April to June) compared to Q4 of 2023 (January to March). Revenue from Gaming lounges decreased by 4.6%, while non-gaming lounges saw an increase of 2.7%.

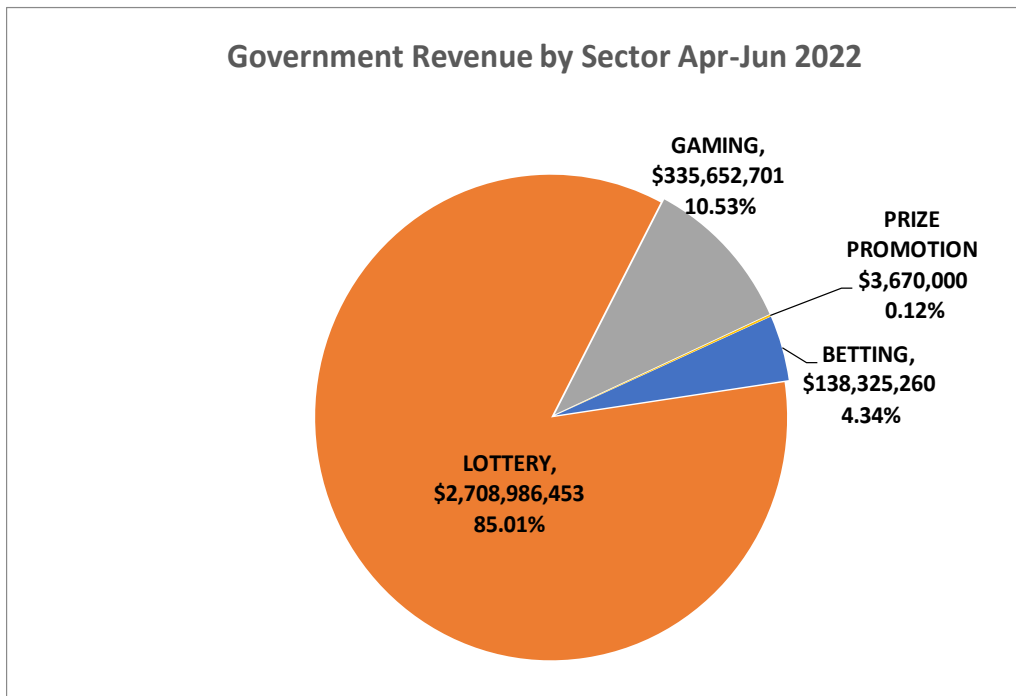
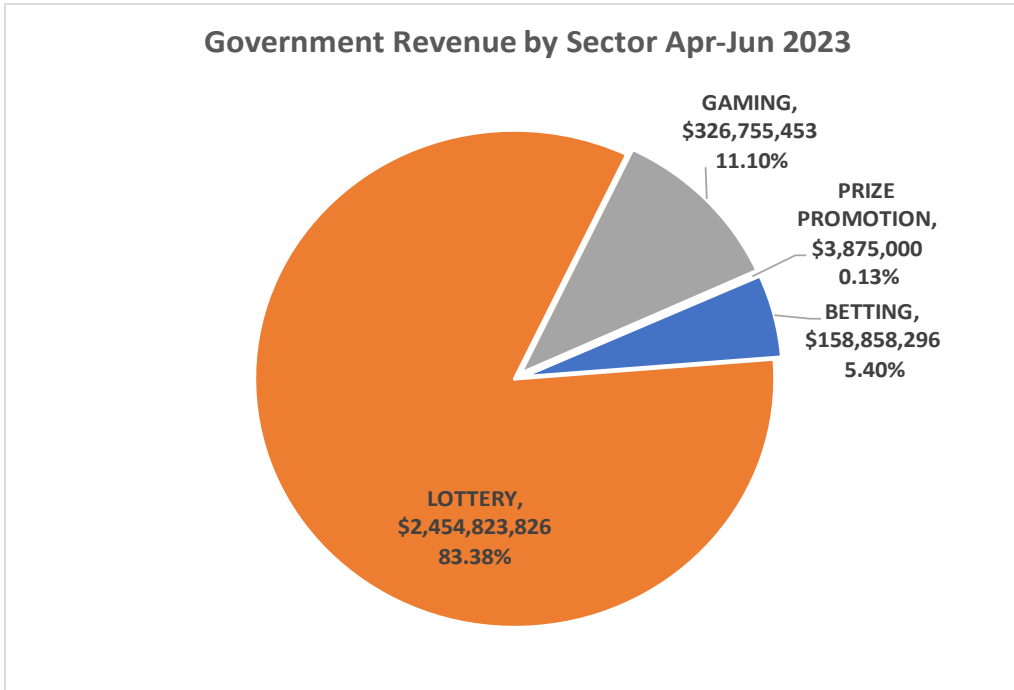
Lottery Sector

Government revenue from lottery sector decreased by -9.38% in the first quarter of 2024 compared to Q1 of 2023, 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)

APRIL - JUNE 2023	CONSOLIDATED FUND			BGLC	JRC	TOTAL
	TAJ	CHASE	TOTAL			April to June 2023
BETTING SECTOR						
<i>Bookmakers Levy</i>						
Local Horseracing	2,466,009	-	2,466,009	4,100,282	20,501,409	27,067,700
Simulcast racing	679,456	-	679,456	1,132,426	5,662,131	7,474,012
Sports betting	32,521,219	4,645,888	37,167,108	4,645,888	-	41,812,996
Unclaimed Winnings	-	-	-	-	-	-
Bookmakers' License Fees	-	-	-	4,695,000	-	4,695,000
SUB-TOTAL	35,666,684	4,645,888	40,312,572	14,573,596	26,163,539	81,049,708
<i>Racing Promoter Pool Betting Duty</i>						
Racing Promoter's License Fees	-	-	-	5,443,000	-	5,443,000
Local Horseracing	3,763,802	-	3,763,802	1,881,901	8,468,555	14,114,259
Simulcast racing	7,423,101	-	7,423,101	3,711,551	16,701,978	27,836,629
Unclaimed Winnings	-	-	-	30,414,700	-	30,414,700
SUB-TOTAL	11,186,903	-	11,186,903	41,451,152	25,170,533	77,808,588
TOTAL BETTING	46,853,587	4,645,888	51,499,476	56,024,748	51,334,072	158,858,296
LOTTERY SECTOR						
Lottery Tax	1,069,576,745	629,285,589	1,698,862,334	310,583,127	-	2,009,445,461
Lottery Winnings Levy	254,513,853	-	254,513,853	-	-	254,513,853
Unclaimed Winnings	-	71,137,568	71,137,568	71,137,568	-	142,275,137
Lottery Licence Fees	3,760,000	-	3,760,000	44,829,375	-	48,589,375
TOTAL LOTTERY	1,327,850,598	700,423,158	2,028,273,756	426,550,070	-	2,454,823,826
GAMING SECTOR						
Gaming Lounges	95,816,255	14,740,962	110,557,218	36,852,406	-	147,409,624
Non-gaming lounges	5,335,089	820,783	6,155,872	2,051,957	-	8,207,829
Licence fees	51,253,000	0	51,253,000	110,485,000	-	161,738,000
Technical Service Provider	-	-	-	9,400,000	-	9,400,000
TOTAL GAMING	152,404,344	15,561,745	167,966,090	158,789,363	-	326,755,453
Prize Competition	-	-	-	3,835,000	-	3,835,000
Charitable Bingo Licence Fees	0	-	-	40,000	-	40,000
INDUSTRY TOTAL	1,527,108,530	720,630,791	2,247,739,321	645,239,181	51,334,072	2,944,312,575

INDUSTRY PERFORMANCE - GOVERNMENT REVENUE (CONT'D)

APRIL - JUNE 2022	CONSOLIDATED FUND			BGLC	JRC	TOTAL April to June 2022
	TAJ	CHASE	TOTAL			
BETTING SECTOR						
<u>Bookmakers Levy</u>						
Local Horseracing	2,144,942	-	2,144,942	3,566,103	17,830,514	23,541,558
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	-	-	-	4,258,000	-	4,158,000
SUB-TOTAL	25,380,384	3,195,654	28,576,038	12,588,046	25,671,961	66,736,046
<u>Racing Promoter Pool Betting Duty</u>						
Racing Promoter's License Fees	-	-	-	5,910,000	-	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	-	-	-	17,855,709	-	17,855,709
SUB-TOTAL	12,848,935	-	12,848,935	30,190,176	28,910,103	71,589,214
TOTAL BETTING	38,229,319	3,195,654	41,424,973	42,778,223	54,582,064	138,325,260
LOTTERY SECTOR						
Lottery Tax	1,232,360,149	763,732,011	1,996,092,160	376,695,699	-	2,372,787,859
Lottery Winnings Levy	152,182,166	-	152,182,166	-	-	152,182,166
Unclaimed Winnings	-	70,861,477	70,861,477	70,861,477	-	141,722,954
Lottery Licence Fees	-	-	-	42,293,475	-	42,293,475
TOTAL LOTTERY	1,384,542,315	834,593,488	2,219,135,803	489,850,650	-	2,708,986,453
GAMING SECTOR						
Gaming Lounges	86,621,478	13,326,381	99,947,860	33,315,953	-	133,263,813
Non-gaming lounges	4,760,852	732,439	5,493,291	1,831,097	-	7,324,388
Licence fees	93,227,500	0	93,227,500	93,937,000	-	187,164,500
Technical Service Provider	-	-	-	7,900,000	-	7,900,000
TOTAL GAMING	184,609,830	14,058,820	198,668,650	136,984,050	-	335,652,701
Prize Competition	-	-	-	3,640,000	-	3,640,000
Charitable Bingo Licence Fees	0	-	-	30,000	-	30,000
INDUSTRY TOTAL	1,607,381,464	851,847,962	2,459,229,426	673,282,923	54,582,064	3,186,634,414