



Gambling participation in the Netherlands: survey 2024 (summary)

Report Ipsos I&O
Commissioned by the Scientific Research and Data Centre (WODC)

Colophon

Published by

Ipsos I&O
Piet Heinkade 55
1019 GM Amsterdam

Report number

2024/097

Date

April 2024

Client

Scientific Research and Data Centre (Wetenschappelijk Onderzoek- en Datacentrum, WODC)

WODC project number

3476

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Summary



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Background

The Dutch policy on gambling has three objectives: 1) consumer protection; 2) combating gambling-related fraud and crime; and 3) preventing addiction. With regard to the latter objective, the Minister for Legal Protection has expressed the intention to monitor the trend in the number of people gambling and the number of at-risk and problem gamblers. After all, an amendment to the Gambling Act (Wok) made it legal to gamble online via licensed providers from October 2021 onwards. This has given rise to concerns regarding an increase in the number of gamblers and problem gamblers. The most recent figures on this stem from prior to October 2021.

Aim

The aim of the present study was to provide insight into:

- the proportion and number of residents of the Netherlands participating in various forms of gambling¹ (at a physical location and online) and the extent to which they are exhibiting at-risk gambling behaviour²;
- the development of Dutch people's gambling behaviour compared to a survey from 2021 (conducted by Kruize, Snippe & De Muijnck).

Methodology

A questionnaire, based on the 2021 questionnaire, was developed for the purposes of this survey. 13,586 residents of the Netherlands aged 16 years and over were approached via the I&O Research Panel. The data was collected from 14 February to 11 March 2024. In the end, 7,180 residents of the Netherlands took part in the survey – a response rate of 51%. A weighting was applied to the data on the characteristics sex, age, level of education, region, and migration background to ensure that the results for those characteristics are representative of the Dutch population aged 16 years and over. Differences between groups were tested for significance ($p < .05$). Only significant differences between groups are mentioned in the text. The results of this survey are based on self-reporting. This means that responses to questions are partly determined by the respondents' memories and how accurate these are. Another factor is that respondents may have wanted to give socially acceptable responses, particularly in relation to their own behaviour.

How many residents of the Netherlands are participating in gambling?

A total of 65% of the Dutch population aged 16 years and over (hereinafter: 'the population' or 'residents') participated in at least one instance of gambling in the 12 months prior to the questionnaire. This pertains to the period from February 2023 to February 2024. It encompasses all types of gambling: lotteries, gambling at a physical location and online gambling. In absolute

¹ The definition of gambling has been drawn from the definition used in 'De nieuwe nulmeting' (Breuer & Intraal, 2021). It encompasses games that see participants betting money with a view to possibly winning money. The following forms of gambling are covered: lotteries, lottery scratch cards, bingo, slot machines, poker, casino games, betting on horse races and on sporting events. A distinction is made in this regard between online gambling and gambling at a physical location (such as in a casino).

² The PGSI (Problem Gambling Severity Index, Ferris & Wynne, 2001) has been used to assess the extent of at-risk and problem gambling. This is a questionnaire consisting of nine questions used to assign people to one of four risk categories: (1) non-problem gambler; (2) low-risk gambler; (3) moderate-risk gambler; or (4) high-risk gambler.

numbers, the number of gambling participants in the Netherlands is between 9,563,000 and 9,891,000 (95%-confidence interval, Table 1.1).

A relatively high proportion of residents only took part in a lottery. If lotteries are omitted from consideration, then 34% of the population gambled at a physical location or online in the past 12 months.

Table 1.1 – Percentage and number of gambling participants in the Dutch population (16+)

	Point estimate (%, number)	95% reliability interval (%, number)
Participation in one or more instances of gambling (at a physical location or online)	65% (9,727,000)	(64%-66%, 9,563,000-9,891,000)
Participation in one or more instances of gambling excluding residents only participating in a lottery (at a physical location or online)	34% (5,074,000)	(33%-35%, 4,910,000-5,237,000)

In this survey, a distinction is made between gambling at a physical location and online gambling. 10% of all residents state that they have gambled online at least once in the past 12 months.³ This equates to between 1,341,000 and 1,545,000 residents. Online gambling is more common among those aged 18-34 than it is among those aged 35 and over. The same goes for residents with a non-Western migration background compared to residents without a migration background or to residents with a Western migration background. Seven out of 10 people who gambled online in the past year state that they gambled online for the first time after October 2021 (the time at which the online gambling market was legalised).

Approximately one third of the population (31%) gambled at a physical location (lotteries omitted from consideration). Gambling at physical locations is more common among residents aged under 35 than it is among those aged 35 and over. The same goes for those with an intermediate level of education compared to those with a low or a high level of education.

Table 1.1 – Percentage and number of gambling participants at a physical location and online among the Dutch population (16+)

	Point estimate (%, number)	95% reliability interval (%, number)
Participation in one or more instances of gambling at a <u>physical</u> location (lotteries omitted from consideration)	31% (4,660,000)	(30%-32%, 4,500,000-4,819,000)
Participation in one or more instances of gambling <u>online</u>	10% (1,443,000)	(9%-10%, 1,341,000-1,545,000)

Among those people who participated in an instance of gambling (lotteries, gambling at a physical location and gambling online), there is a small group who only gambled online (1%). Approximately one in seven gamblers gambled both online and at a physical location (14%).

³ This pertains to all respondents who stated that they had gambled online in the past 12 months (see 2.1 explanation questionnaire).

Slightly more than one third only gambled at a physical location (37%). The rest (48%) only did a lottery.

In what forms of gambling do Dutch people participate?

Lotteries are the form of gambling participated in by what is by far the largest group in the past 12 months. These are followed by lottery scratchcards bought in a shop or via krasloten.nl (21%), bingo (7%), slot machines (6%) and casino games (5%) at a physical location. The most common form of online gambling is betting on sporting events (4%). 3% of residents played online slot machines.

Do gamblers win or lose money when gambling?

Those who participated in some form of gambling in the past 30 days were asked whether on balance they lost money or won money. The group that lost money in the past 30 days exceeds the size of the group that won money. This goes for all forms of gambling. There is also a group that neither won nor lost money (broke even) and a group that cannot remember. Relatively modest losses were involved in the case of betting on sporting events and scratchcards at physical locations, with a majority of these gamblers (75% and 72% respectively) losing less than 20 euros in the past 30 days. The losses were relatively the highest in the case of gambling on slot machines and in casino games (physical location), with 28% and 37% of those who had played in the past month losing 100 euros or more. Among those who made a loss at online gambling, nearly four out of 10 (38%) lost an amount between 1 and 19 euros, 29% lost an amount between 20 and 49 euros and 13% lost an amount between 50 and 99 euros. The remaining 19% of the group lost in excess of 100 euros.

How has gambling behaviour developed compared to 2021?

A one-to-one comparison of the 2021 and 2024 survey results is not well possible because of the sum of (small) changes in the questionnaire, the time of measurement and possible panel-related and/or agency-related effects. For this reason, no firm statements can be made on the development in gambling participation and the degree of problem gambling since 2021 based solely on the comparison between the two studies. Nevertheless, it is possible to validate the results of this measurement with other outcomes from this study, other survey studies and data from the Gambling Authority ('Kansspelautoriteit'). In 2021, 22% of Dutch residents aged 16 years and over stated that they had gambled at physical locations (lotteries omitted from consideration). At that time, casinos, arcades and hotel and catering establishments were subject to prolonged closures or (visitor) restrictions due to the coronavirus. Coronavirus restrictions are no longer in place in 2024. In 2024, 31% of residents say that they have gambled at a physical location in the past year.

Moreover, 12% of residents participating in the previous measurement said that they had participated in online gambling in the year leading up to the questionnaire.⁴ For the most part, this was online bingo and online betting on sporting events, possibly due to activities largely being done online because of the coronavirus. Online gambling via licensed providers was legalised shortly after the 2021 measurement. In 2024, 10% of residents said that they participated in online gambling. As stated, an aggregate of methodological changes means that

⁴ This pertains to all respondents who stated that they had gambled online in the past 12 months (see 2.1 explanation questionnaire).

this comparison is indicative, and no firm conclusions can be drawn on the basis thereof. That said, there are indications that the number of participants in online gambling has increased since the market was legalised: The present survey saw 70% of those who gambled online in the past year state that they first gambled online after October 2021. The Kansspelautoriteit also reports an increase in the number of online players and an increase in the number of registered player accounts since the opening of the legal market.

To what extent is at-risk gambling behaviour in evidence?

The Problem Gambling Severity Index (PGSI) was used to calculate the number of gamblers exhibiting at-risk gambling behaviour. The PGSI provides an indication of at-risk gambling behaviour rather than a DSM-5 diagnosis for gambling addiction.

The vast majority of the group of residents who gambled one or more times in the past 12 months are in the non-problem gambler group (87%), according to the PGSI. 7% are low-risk gamblers. One in 20 meet the criteria for a moderate-risk gambler or a high-risk gambler (3% and 2% respectively). 6% of those aged 18-24 who gambled are high-risk gamblers. This is significantly higher than the proportion of high-risk gamblers in the 35-49 age group (2%) and in older age groups (1%). More low educated people (3%) than high educated (1%) are high-risk gamblers and the same is true for players with a non-Western migration background (7%) compared to those without (1%) - or with a Western migration background (2%).

Converted to the entire Dutch population aged 16 years and over, respectively 2% and 1% meet the criteria for a moderate-risk and a high-risk gambler. (Table 1.3). In absolute numbers, there are between 275,000 and 376,000 adult residents with a moderate-risk profile and between 141,000 and 216,000 with a high-risk profile.

Table 1.3 – Percentage and number of moderate-risk and high-risk gamblers in the Dutch population

	Point estimate	95% reliability interval
Moderate-risk gambler	2.2% (326,000)	1.8%-2.5% ⁵ (275,000-376,000)
High-risk gambler	1.2% (179,000)	0.9%-1.5% (141,000-216,000)

In 2021, it was estimated that there were between 294,000 and 431,500 moderate-risk gamblers and between 162,400 and 268,900 high-risk gamblers (Kruize, Snippe & De Muijnck, 2021). As stated earlier, a one-to-one comparison between the 2021 and 2024 survey results is not possible due to the sum of changes in the research design. If the comparison had been possible, then it would not be possible to identify a significant increase or decrease in the number of moderate-risk and high-risk gamblers in the Dutch population based on the 95%-confidence intervals.

At-risk gambling behaviour among online gamblers

The proportion of moderate-risk and high-risk gamblers is higher among people who gambled online in the past 12 months compared to people who did not: Of those who gambled online at least once, 18% are categorised as moderate-risk or high-risk gamblers. Of those who also have their own online gambling account, 20% are moderate-risk and high-risk gamblers.

⁵ The percentages have been rounded to one decimal place. The reliability interval will appear asymmetrical as a result.

Participants in online gambling

Several follow-up questions were put to those respondents who had gambled online in the past 12 months. These questions pertained to gambling frequency, number of gambling accounts, use of legal or illegal websites and any experiences of interventions on the part of online gambling providers.

- Nearly one in 10 of the participants in online gambling (9%) gambled online every day (or nearly every day) or a few times a week. The majority (62%) gambled online once or a few times in the past year.
- Two thirds of online gamblers (67%) say that they have one or more registered accounts for the purposes of gambling online. Two in 10 (19%) use someone else's account and do therefore not have their own account. The remainder say that they do not have an account (10%) or say something else applies (4%), such as them having already closed the account.
- The majority (75%) state that they only gamble on legal websites. One out of five (22%) do not know whether they are using a legal or an illegal website. The rest (3%) claim that they use illegal websites.
- Half of the online gamblers (48%) say that they have been informed of the addiction risk of gambling while playing online in the past 12 months. Four out of 10 (40%) say they have been informed of the odds of winning.

Visiting Holland Casino and arcades

One in 20 residents (5%) visited a branch of Holland Casino in the past year. Fewer people visited an arcade (2%). Additional questions were also put to those who had visited arcades and Holland Casino.

- Most people who had visited Holland Casino did so once (50%) or a few times (33%) in the past year. 7% went weekly or more often. Frequency of visit was approximately the same for those who visited an arcade.
- Nearly three out of 10 visitors to Holland Casino say that they have been informed of the addiction risk of gambling. . Around two in 10 say that they were informed of the odds of winning.

Reflection

The aim of this study was to provide insight into 1) the proportion and number of Dutch people participating in gambling, 2) the extent to which they exhibit risky gambling behaviour, and 3) the development of gambling behaviour of residents of the Netherlands compared to a measurement from 2021. An important reason for the survey was the lack of figures on gambling participation since the amended Gambling Act (Wok) came into force and made online gambling via licensed providers legal.

With regard to the first aim, a distinction was made in the survey between gambling at physical locations and online gambling. It is evident that more residents are participating in gambling at physical locations than online in 2024. Between 4,500,000 and 4,819,000 people gambled at a physical location (31% of the population) and between 1,341,000 and 1,545,000 people gambled online (10% of the population), a sizeable proportion of whom say that they do so on a legal website and only started to do so after October 2021, the moment of legalization. Participation in

online gambling is higher among young adults (aged 18-34) and among people with a non-Western migration background.

The PGSI was used to ascertain the extent of at-risk gambling. According to the PGSI, most gamblers are non-problem gamblers (87%). 2% of all gamblers are in the high-risk gambler group. There are two groups in which the proportion of high-risk gamblers is relatively high. These are people aged 18-24 (6%) and people with a non-Western migration background (7%). In addition, online gamblers are more likely than average to label themselves high-risk gamblers, with 10% of online gamblers with their own account satisfying the high-risk gambler criteria.

In terms of comparing the prevalence of participation in gambling and at-risk gambling between 2021 and 2024, we had to conclude that a one-to-one comparison in that regard is hampered by an aggregate of methodological factors, making such a comparison indicative. However, we were able to infer from other sources that it is plausible that participation in gambling at physical locations has increased since the 2021 measurement, which was conducted during the coronavirus crisis. When it comes to online gambling, it is also plausible that there has been a rise in the number gamblers since the online gambling market was legalised. This can be inferred from estimates from the Kansspelautoriteit. In addition, in this study seven in 10 last-year players indicate that they did not gamble online for the first time until after October 2021.

A limitation of the survey is that the results are based on self-reporting on past behaviour. Nevertheless, questionnaires are an efficient, accessible means of conducting research into prevalence in the population. The accuracy of the results is bolstered by the large number of participants. With the modifications made to the questionnaire in 2024, it provides a solid basis for any follow-up measurements in the future.

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