Dutch citizens' perspective on gambling (summary)

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Summary

Background

For the Ministry of Justice and Security (hereafter: J&V) it is important that it can properly monitor the detailing of gambling policy and specific (topical) themes and developments in the gambling domain. A significant aspect of this process is to identify the views, experiences and needs of players themselves in respect of gambling. This information is all the more relevant because the Remote Betting and Gaming Act (*Wet kansspelen op afstand*) will be evaluated in 2024.

There are several sources available that already provide insight into players' perspectives. At the same time, data are rapidly becoming outdated due to current developments, there is no independent monitoring, and some topics remain underexposed. For this reason, the Ministry of JenV has asked the WODC to conduct a study in which the perspective of gambling participants on various (socially) relevant and current topics is provided.

The approach taken in this study was to conduct a wide-ranging survey into the attitude of all Dutch citizens towards gambling and related themes. Therefore, the survey addresses the perspective of players as well as that of non-players. In this way, it is possible to draw a comparison between the two groups and describe the differences, if any.

Relationship with earlier survey by Ipsos I&O and WODC

Ipsos I&O conducted two other surveys for the WODC. The report on study into playing limits in online gambling was published in November 2023. This report discussed the experiences and needs of online gamblers with playing limits. A second report appeared in June 2024. This was a prevalence study that measured the share and number of Dutch people participating in different types of gambling and compared the outcomes to a 2021 measurement. Both surveys have aspects in common with the present report. Where relevant, we will refer to the previous surveys and identify the similarities and differences in findings.

Aim

The aim of the present survey was:

- to map out which subjects require the perspective of players and non-players according to experts and policy officers;
- to incorporate that need for information in a questionnaire that is suitable for periodic repetition, to present this questionnaire to players and non-players and thereby meet the need for information as formulated in the first objective.

Methodology

The study comprised two phases, which were in line with the two objectives. The first phase consisted of desk research, interviews with relevant organisations and experts, the preparation of a memorandum of findings and a workshop with policy offers of the Ministry of J&V. Using these various research methods, we prioritised the subjects that required information on the perspective of players and non-players.

During the second phase, we subsequently developed a questionnaire that focused on the themes prioritised in the first phase. Altogether, we approached 7,000 Dutch citizens aged 18 and older from the I&O Research Panel. The data was amassed over a period running from 18 to 29 April 2024. In the end, 3,667 Dutch citizens took part in the survey – a response rate of 52%. The data were weighted 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 18 and older. Differences between groups were tested for significance (p<.05). Where the text refers to a difference between groups, this difference is statistically significant. Please note, finally, that the outcomes of this investigation are based on self-reporting. Self-reporting has a number of limitations, such as potential distortion due to misremembering, socially desirable answering and self-overestimation or self-deprecation.

This survey makes a distinction between various groups. What persons fall within each group is explained in the box below.

- **Dutch citizens**: all Dutch citizens aged 18 and older. Where relevant, this group is also referred to as 'players and non-players'.
- **Players**: Dutch citizens who played one or more games of chance in the past 12 months, except those who only took part in a lottery.
- **Non-players**: Dutch citizens who did not play any games of chance in the past 12 months or only took part in a lottery.

The Dutch citizens who only took part in a lottery in the past year are therefore not regarded as 'players'. This is because research has shown that the nature of their playing behaviour and their motives are different compared with players of other games of chance.

Players were subsequently subdivided into two groups:

- **Online players**: players who played one or more games of chance online and possibly also at a physical location.
- **Non-online players**: players who played one or more games of chance exclusively at a physical location.

Recent research (Van Miltenburg, Klein Kranenburg, Hollander & Bouwmeester, 2024) has shown that often online players also play games of chance at a physical location. However, those who play at a physical location do not generally do so online as well. This is why we opted for this categorisation.

Finally, we sometimes refer to lottery participants.

Lottery participants: Dutch citizens who took part in a lottery in the past 12 months. They may qualify as players and as non-players in the above classification, depending on whether they played other games of chance as well.

What is the frequency of gambling?

The majority of Dutch citizens who gambled, played at a physical location and had done so one or more times in the past year (82%). One in five (18%) played once or several times a month at a physical location. The frequency of online gambling is higher than the frequency of gambling at a physical location. Thus, just over half of online gamblers (57%) played once or several times a month. A quarter of these gamblers (26%) played online games of chance once or several times a week.

What choices do players make as regards the moment of playing, with whom they play and possible substance use?

More than half (54%) of the players who play once or several times a month do so primarily or exclusively at the weekend. Three in ten (29%) do so primarily or exclusively on weekdays. The rest (17%) play equally often at both times of the week. As for the time of day, it appears that two thirds of the players (66%) play only or primarily in the evening. One in five (19%) play primarily or exclusively in the afternoon. Eight percent primarily use the morning for playing, and one percent play primarily or exclusively at night.

There are differences between online and non-online players when it comes to the time of gambling and the company in which they play: online players are more likely to play primarily or exclusively at the weekend (59%) compared with non-online players (45%). Furthermore, of the online players, the majority (54%) gambled primarily or exclusively without acquaintances being present, whereas most non-online players played in the company of acquaintances (63%). There is no difference between online and non-online players where substance use is concerned. One in three (33%) had sometimes drunk alcohol while gambling during the past 12 months. A smaller group had used cannabis (11%) or other drugs (4%). There is a relation between substance use and the company in which someone (primarily) plays: the percentage of players drinking alcohol is higher among those who primarily play in the company of acquaintances (42% do so occasionally or frequently) than among those who primarily play without acquaintances (22% do so occasionally or frequently). The reverse applies to the use of cannabis: the occasional or frequent use of cannabis while playing, is higher among players who primarily play without acquaintances (15% occasionally or frequently versus 6% occasionally or frequently).

What are players' motives for gambling?

When it comes to playing games of chance (other than a lottery), winning prizes or money is the most cited reason for taking part (53%). Another frequently mentioned argument is the excitement that playing brings (34%). The motives differ between online and non-online players. The latter group more often cite being with others as an argument for playing. Online players more often use the argument 'to stave off boredom'.

The main argument for taking part in a lottery[1] is, just like in other games of chance, the possibility of winning prizes or money (75%). Supporting charities is another frequently cited argument, especially by older players (38%, rising to 54% for people over 65). Younger players are more likely to play because of the excitement.

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[1] *The question was whether Dutch citizens took part in a lottery (such as the Staatsloterij, Nationale Postcode Loterij, Lotto, Vriendenloterij, Grote Clubactie or Zonnebloemloterij). Participants were not asked which specific lottery they played. This may be related to the motives for playing.*

What is the attitude of players of games of chance towards gambling and how do they perceive the chance of winning?

All Dutch citizens (therefore both players and non-players) were asked how they viewed the acceptance of gambling. Four in ten (43%) believe that gambling is accepted by the majority of Dutch society. To a lesser extent, Dutch citizens indicate that gambling is accepted in their own family (13%) or circle of friends (19%). Dutch citizens who played games of chance in the past 12 months are more positive about the degree of acceptance than those who did not. Thus, players are more inclined than non-players to believe that gambling is accepted by the majority of Dutch society, while they also agree to a larger extent with the statement that 'the occasional flutter is just part of life'.

When it comes to the perception of the probability of winning and the associated playing behaviour, players were asked about their actual behaviour and non-players about the expectation of their behaviour. Most players and non-players state that they are not likely (or, in the case of non-players, would not be likely) to continue playing after losing. More than eight in ten Dutch citizens do not think that continuing would have a positive outcome in the longer term, or that having a strategy or particular knowledge or skills would help them win money.

More online players than non-online players believe that continuing would pay off. Likewise, online players tend to have greater trust in their own strategy, knowledge and/or skills: 12% of the online players said they could make a fairly accurate prediction of when they are going to win, versus 3% of the non-online players. Finally, players of certain games in which knowledge of the game (such as poker) or sport (in betting) can increase the chances of winning, are more likely to continue playing after losing and to trust their own knowledge, strategy and skills than players of other types of game of chance, such as bingo or scratch cards.

A large majority of non-online players (80%) expect that in the long term they will lose more money than win in the game they play most often. Most of the online players expect to lose as well, albeit in smaller numbers (62%). One in ten online players expect that in the long term they will win more money than lose. Among non-online players this figure is 2%.

How do players and non-players view the risks of gambling?

All Dutch citizens (therefore both players and non-players) were asked questions about the risks of gambling. The general opinion is that the main potential risks of playing games of chance – both for the player and for others – are losing money and developing an addiction. The majority of Dutch citizens (73%) believe that the chance of addiction is greater for online gambling than for non-online gambling. One quarter (23%) believe that both are equally addictive. Young people aged between 18 and 24 are more likely than people aged 25 and older to think that gambling at a physical location is more addictive than online gambling.

As regards the addiction risk of various types of games of chance, nearly half of Dutch citizens think that slot machines involve the greatest risk of addiction (44%). These are followed by casino games, which 29% regard as the most high-risk. When asked which game of chance Dutch citizens consider the least addictive, 39% said lotteries and 33% said bingo.

What consequences do players experience when gambling?

Most Dutch citizens who had played a game of chance in the past year said that this had not got them into trouble. Two percent replied that gambling had got them into trouble, while another three percent stated that they had risked getting into trouble. Online players were more likely to indicate that they had got or risked getting into trouble (11%) than non-online players (3%). In addition, men were more likely to (nearly) get into trouble than women (8% versus 1%), while those educated at low or medium level were more at risk than those educated at high level (13% and 6% respectively versus 1%). One in ten players with a non-Western migration background stated that they had got or risked getting into trouble because of gambling in the past year. This is a higher figure than that for players without a migration background (4%).

Players were also presented with a number of possible consequences of gambling: financial consequences, reduced performance, physical and mental problems, emotional consequences and social consequences. Two in ten (22%) players experienced at least one of these consequences. In particular, they mentioned regrets about gambling (15%) and spending less money on nice things (8%). In all areas, online players experienced more negative consequences than players who played only at physical locations. Thus, gambling caused more than one in ten online players (14%) to spend less money on nice things, while a comparable percentage (12%) withdrew money from their savings account to use for gambling. Furthermore, one in ten online players indicated that their work or studies had suffered. Three in ten (28%) online gamblers regretted gambling in the past year. This applied to 9% of the non-online gamblers.

What do online players look out for when choosing a provider and how do they view playing limits?

Nearly half of the online players (42%) say that they checked the legality of the website when choosing an online game provider. Most players (81%) find it important to play on a legal website, but 38% have difficulty making this distinction. When choosing a gaming provider, players also considered recommendations from friends, the payout percentage, reviews and the layout of the website. One in five did not look at specific aspects.

Under the current regulations, all online gamblers are supposed to set playing limits. The majority of the online players say that they have indeed set these playing limits when creating their account (74%). There is also a group that cannot remember whether they have done so. Although most players support mandatory playing limits, a minority state that they consider this necessary for themselves and/or find these limits helpful.

Four in ten online players (39%) say that they reached a playing limit in the past year. Some of them say that this caused them to stop playing, either temporarily (32%) or permanently (12%). Some also state that they registered with CRUKS for a gambling stop (6%). Other players continued playing, for example by playing on another website (12%), by increasing their playing limits (8%) or visiting a physical location (5%). Of those who reached a playing limit, 15% say that they took no further steps.[2]

How aware are players and non-players of the various bodies offering help with gambling and gambling problems, and how do they experience the provision of information about the risks?

Most players are unaware of the various organisations which provide help with gambling problems. The majority have never heard of Loket Kansspel, CRUKS or Stichting AGOG. Loket Kansspel is the best known of these in relative terms: one in five players knows about this organisation. Online players are more aware of the organisations than non-players and non-online players.

Most of the players feel well informed about the addiction risks of gambling. Half of the players also feel well informed about the chances of winning. Younger players (aged 18 to 34) feel less well informed than players aged 35 and older. Their need for information about the risks is greater than that of older players.

To what extent are Dutch citizens confronted with gambling advertisements?

More than half of Dutch citizens noticed gambling advertisements on the Internet in the past month. In addition, 41% noticed gambling advertisements via sponsoring. People also encountered advertisements on social media, especially on TikTok, YouTube, Facebook and Instagram.

Reflection

This survey has mapped out the views of players and non-players on subjects which were identified in a qualitative preparatory survey as themes on which there is an urgent need for information. These subjects are: (1) playing frequency and choices which players make while gambling, (2) motives for gambling, (3) experiences with playing limits, (4) attitude towards gambling and the chance of winning, (5) the perceived risks of gambling and the consequences experienced by players, (6) the awareness of the care available, and (7) exposure to advertisements. For all (wide-ranging) subjects, a distinction was made between non-players, online players and non-online players (people gambling only at physical locations).

This survey demonstrates that online players and non-online players differ in playing behaviour and attitude towards gambling. Players of online games of chance play more frequently compared to non-online players. In addition, they are more likely to play alone and at night. They also have different reasons for gambling, for example 'to stave off boredom'. Furthermore, online players are more likely than non-online players to believe that gambling is accepted in their immediate environment. Online players are also more likely to trust their skills when playing and are more likely to use a strategy.

Two percent of the players said that gambling had got them into trouble, while another three percent said that they had risked getting into trouble. In addition, this survey addressed negative consequences which players might experience, for instance in their performance at work or school or in maintaining social relationships, which they might not classify as a problem. More than one in five gamblers (22%) indicated that they had experienced one or more of these

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[2] *Multiple answers could be selected. Therefore we cannot conclude here that the percentage that stopped when reaching the playing limit is larger than the percentage that continued playing.*

consequences. Especially ‘regret’ and ‘spending less money on nice things’ were mentioned relatively often. A comparison of online players and non-online players again shows a clear difference: in all areas, online players experienced more negative consequences than players who played only at physical locations. Thus, gambling caused more than one in ten online players to spend less money on nice things, while a comparable percentage withdrew money from their savings account to use for gambling. Furthermore, one in ten online players indicated that their work or studies had suffered. Nearly one third of the online players had regretted gambling in the past year.

This survey also shows that players of different age groups, levels of education and migration backgrounds hold different views on gambling and gambling behaviour. For example, young people (aged 18 to 24) are more likely to think that gambling is accepted in society. They also have a different take on the addiction potential of (online) gambling. Thus, young people are more likely than people aged 25 and older to think that gambling at a physical location is more addictive than online gambling. A player’s level of education is relevant to aspects such as the perception of the chance of winning: less educated online players are more likely to expect to win money in the game they play most often. Highly educated players, on the other hand, expect to lose money in the long term. The study also reveals that less educated players more often got into trouble or were at risk of getting into trouble because of gambling. The same goes for Dutch citizens with a non-Western migration background compared to Dutch residents without a migration background.

Although there may be some degree of socially desirable answering of the questions, the survey results provide valuable insight into players’ experiences, motives, playing behaviour and attitude towards gambling. The overall conclusion that can be drawn from this survey is that players cannot all be tarred with the same brush. There are differences in terms of type of player and demographic background characteristics that could be taken into account when detailing (new) policy.

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