Summary

Perspective of Dutch citizens on gambling: 2025 survey

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Summary

Background of the survey

The gambling market and how it is regulated by the government are in a state of flux. It is important for the Ministry of Justice and Security (hereafter: J&V) that it can properly monitor the effects of gambling policy and specific (topical) themes and developments in the gambling domain.

In 2024, Ipsos I&O conducted a first 'Perspectives on Gambling' survey, which focused on various themes that are current and relevant to the Ministry of J&V and experts in the field of gambling. Due to current developments, information is rapidly becoming outdated and new issues have emerged. For this reason, the Ministry of J&V asked the Scientific Research and Data Centre (WODC) to again carry out an investigation this year in order to shed light on the views Dutch citizens (16 years and older) have regarding various (socially) relevant and topical issues in the context of gambling.

The approach taken in this investigation was to conduct a wide-ranging survey into the attitude of all Dutch citizens of 16 years and older towards gambling and related themes. The focus therefore is both on the perspective of players and on the perspective of non-players. The player group is further subdivided into players who play at a physical location and online (online players) and those who only participate at physical locations (non-online players). As a result, it is possible to draw a comparison between the two groups and describe the differences, if any.

Objective and research questions

The main question that this study aims to answer is: What perspectives on gambling exist among players and non-players, and what developments have arisen since the 2024 survey?

Based on the main question, the following sub-questions were developed:

1. What are the information needs regarding gambling? This concerns both the information needs from a policy perspective, as well as from relevant stakeholders.
2. What are the perspectives of players and non-players with regard to these themes?
3. What developments in the perspective on gambling have arisen in the past year?

Methodology

The survey consisted of two phases. The objective of the first phase was to identify the topics on which the perspective of players and non-players is desired. The Ministry of J&V and external experts in the field of gambling were asked to specify which relevant and current topics should be addressed. This was based on the existing analysis that had been drawn up for this in the previous survey. A final choice was arrived at in consultation with the supervisory committee.

The objective of the second phase was to incorporate the chosen topics in a questionnaire and then submit it to players and non-players in the form of an online survey. In total, 8,000 Dutch citizens aged 16 years and over were approached via the I&O Research Panel. The data was amassed over a period running from 3 to 17 September 2025. In the end, 3,366 Dutch citizens took part in the survey – a response rate of 38%. 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 ($p<.05$). 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 16 and older.
- **Players**: Dutch citizens who played one or more games of chance in the past 12 months, except for those who only took part in a lottery.
  - **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.
- **Non-players**: Dutch citizens who did not play any games of chance in the past 12 months or only took part in a lottery. Dutch citizens who only took part in a lottery in the past year are therefore not regarded as 'players' of games of chance in this study.

Key topics

Several themes emerge from the analysis that are current and relevant. These themes can be grouped in two categories: (1) questions about the *behaviour* of players of games of chance, and (2) questions about the *perspective* of players and non-players on gambling-related topics.

- In respect of the behaviour of players, there is a need for information about the reasons for playing games of chance. Special attention is needed for high-risk gambling activities such as playing slot machines and betting on the outcome of sports matches. There is also interest in the group of young players: how do they play? And in particular, how do they play online? With an account in their name, or in someone else's name, and on legal or illegal websites? Finally, information is needed about the extent to which players and their relatives experience problems and other negative consequences as a result of playing games of chance.
- In terms of the perspective, knowledge is needed about how players and non-players view some of the proposed changes to the gambling policy. There is also a need for information on the social acceptance of gambling, and the perception of problems caused by it. Furthermore, the name familiarity of some support and care organisations in the area of gambling is also considered relevant.

Part 1: player behaviour and choices

Winning money or prizes, and the social aspect are the main drivers for playing

The main reasons for players to play a game of chance are winning money or prizes (38%) and the social aspect (37%). There are differences between the reasons for playing of online players and non-online players. For example, the online group plays more often for excitement/thrills (30% versus 18% among non-online players) and as a way to relax (16% versus 8%). Non-online players are more likely to say they play for the social aspect (40% versus 31%) or because it is an established tradition or habit (20% versus 9%).

In the case of two games identified as 'high-risk games' (slot machines and betting on the outcome of sports matches), respondents were asked to state their specific reasons for playing. Their motives for participation appear to be slightly different from those for games of chance in general. Slot machine players are driven by motives such as relaxation (20% versus 11% overall) and ease of play (13% versus 4% overall). Within this

group, indicators of risky gaming behaviour are also more common, such as trying to win back lost money (4% versus 1% overall). The motives of those who bet on the outcome of sports matches indicate a focus on social and competitive elements: the influence of friends (21% versus 6% overall), a more intense sports experience (14%) and the belief of being good at the game (7% versus 2% overall).

Four percent encountered difficulties due to gambling (by their own admission), or were at risk

Most people who had played a game of chance in the past year said that this had not got them into trouble. Four percent indicated that they did experience problems (1%) or were at risk of experiencing problems (3%). That percentage is similar to the 2024 survey (5%). Among 21 to 23-year-olds, this percentage is relatively high at 9 percent. The same is true for online players: within that group, 9 percent report problems (or a risk of problems). Some of the players experience negative consequences (in addition). These negative consequences may be associated with work and school, or relate to financial and social impacts. For example, one in twenty players say they sometimes use savings to gamble (5%), sleep less (4%) or lie to their partner, friends or family (5%). In respect of all the negative consequences presented, online players report them more often than non-online players.

Table 1. How often in the past 12 months did your own gambling cause you to... % Often + every now and then. Some examples of differences (more items were presented)

	All players (n=953)	Online player (n=319)	Non-online player (n=634)
... spend less on everyday things like food, bills and clothing?	6%	10 %	3 %
... use your savings?	5%	10 %	3 %
... perform poorly at your work or school?	3%	8 %	0 %
... sleep less?	4%	10 %	1 %
... lie to your partner, family, friends or others about how much you gamble?	5%	10 %	3 %

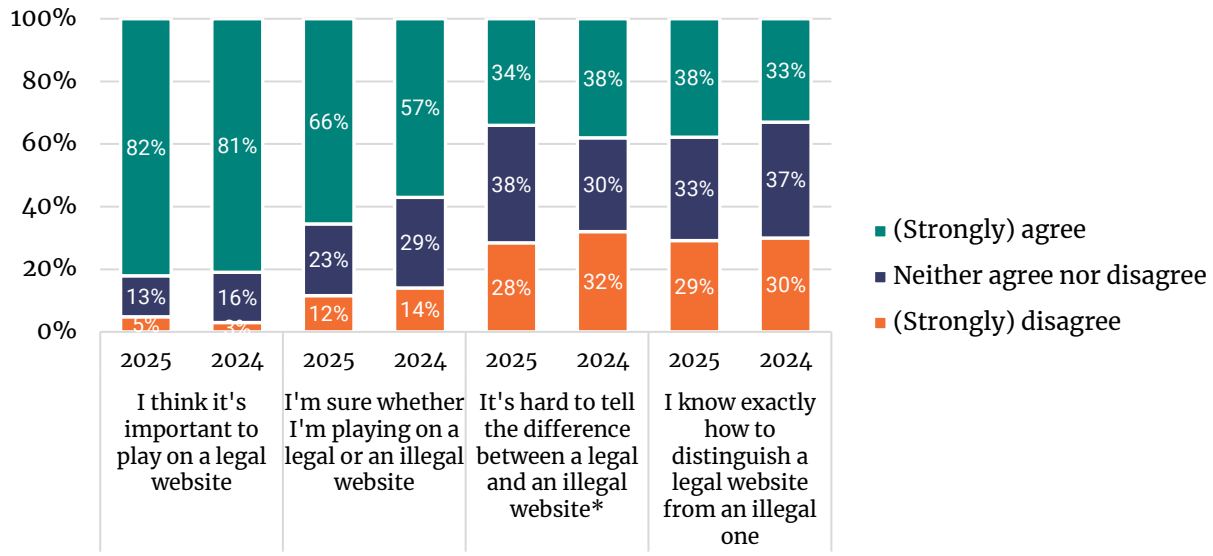
The majority thinks that legal online gambling is important, but doesn't pay attention to this in practice

The majority of online players (82%) indicated, as in 2024 (81%), that it is important to gamble on a legal website. In practice, online players state that they pay attention to a variety of aspects when choosing a gambling website. Four in ten players say they pay attention primarily to the reliability of the website (40%) and whether it is a legal provider (41%). More practical and social considerations follow at a distance, such as good reviews (14%), the availability of a specific game of chance (13%) and the amount of personal data to be provided (12%). So, although the reliability and legality of the provider are considered important, the majority is not concerned with this when choosing a provider. Being able to distinguish between legal and illegal providers may play a role here: this does not appear to be easy for everyone. One in three say they have difficulty with this (33%). However, an improvement is apparent compared to 2024: back then, 38 percent still had difficulty with this. Also, the proportion who know for sure that they are playing on a legal or illegal website has increased (up from 57% to 65%), and a greater proportion say they know how to distinguish between the two (up from 33% to 37%).

According to players, factors related to marketing, such as receiving a bonus (6%) and the payout percentage (Return to Player, 4%) are of secondary importance in the choice process.

Figure 1 - To what extent do you agree with the following statements?

Base: online players of games of chance, n=319.



**In 2024, this statement was worded as follows: 'It is difficult to distinguish between a legal and illegal website.'*

Part 2: Perspective on games of chance

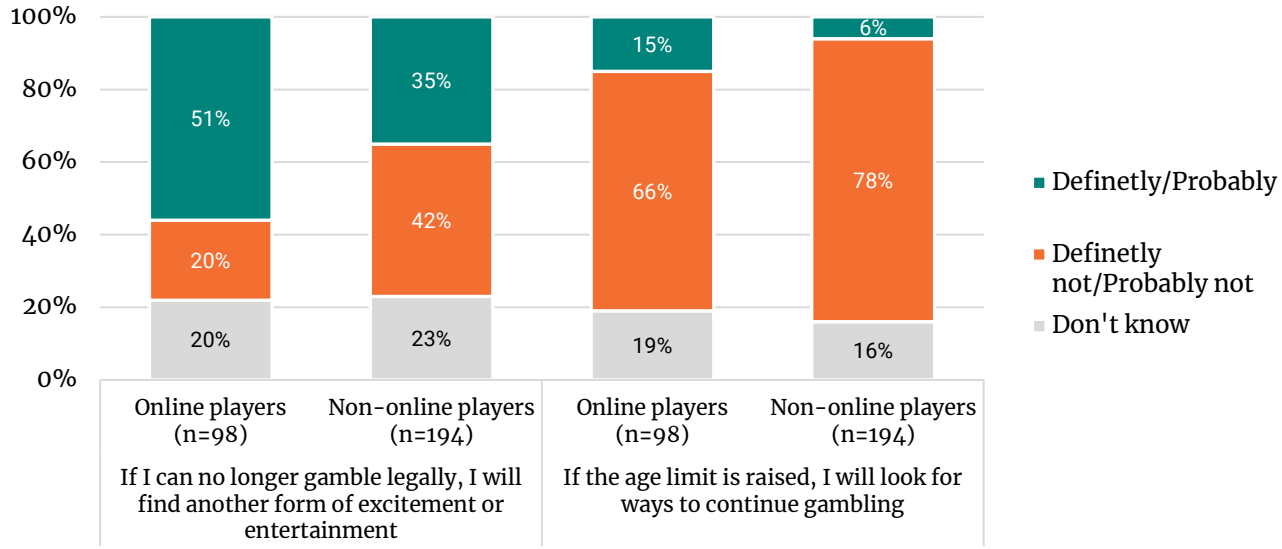
Support for protecting young adults against the risks associated with gambling

There is significant support in society for protecting young adults against the risks associated with gambling. The vast majority (85%) of players and non-players support the idea of raising the age limit for gambling participation to 21, both for online games of chance and games of chance at physical locations. Support for the measures is greatest among groups not directly affected by them. Non-players (88% in favour) and people over 21 (87% in favour), for example, are the most outspoken proponents of raising the age limit. But even among under-21s and online and non-online players, a majority favour this measure (69-84%). There is also broad support for stricter rules for high-risk games of chance (88%).

There's a possibility that raising the age limit could cause young players to switch to the illegal market. However, most young players (under 21) say they will (definitely) not do so (online players: 66%; non-online players: 78%). About one in seven young players (15%) say they may well look for ways to continue gambling if the age limit is raised. A larger group indicates that it will look for another form of excitement or entertainment if legal gambling is no longer possible for them (Figure 2).

Figure 2 - Could you indicate to what extent you agree or disagree with the following statements?

Base: all Dutch citizens aged 21 or younger, n=468.

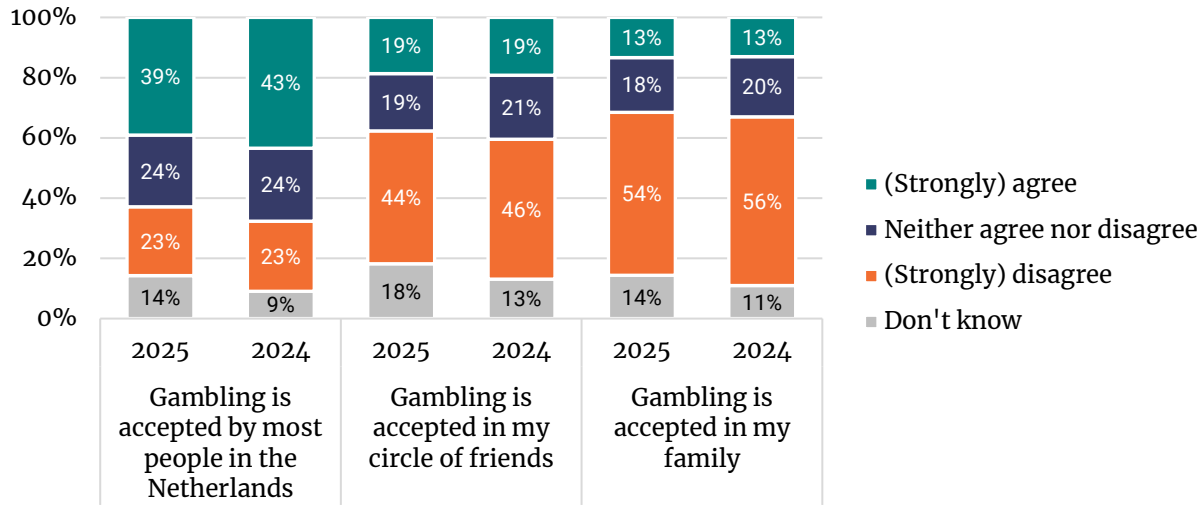


Social acceptance of gambling higher than among family members or close friends

Both players and non-players were asked how they assess the social acceptance of gambling. A little under half (39%) of Dutch citizens feel that gambling is accepted as a social phenomenon. This is lower than in 2024, when it was 43 percent. People tend to rate acceptance among their own family members or close friends as lower than the overall average. The perception of acceptance in the personal setting (friends and family) remained unchanged in 2025 compared to 2024.

Figure 3 - Do you agree or disagree with these statements about gambling in general?

Base: all Dutch citizens, n=3,366



Players of games of chance assess the social acceptance of games of chance at a higher level than non-players. Half (48%) of the players believe that gambling is accepted by most people in the Netherlands. People feel that the level of acceptance among their close friends is lower: 40 percent of the online players

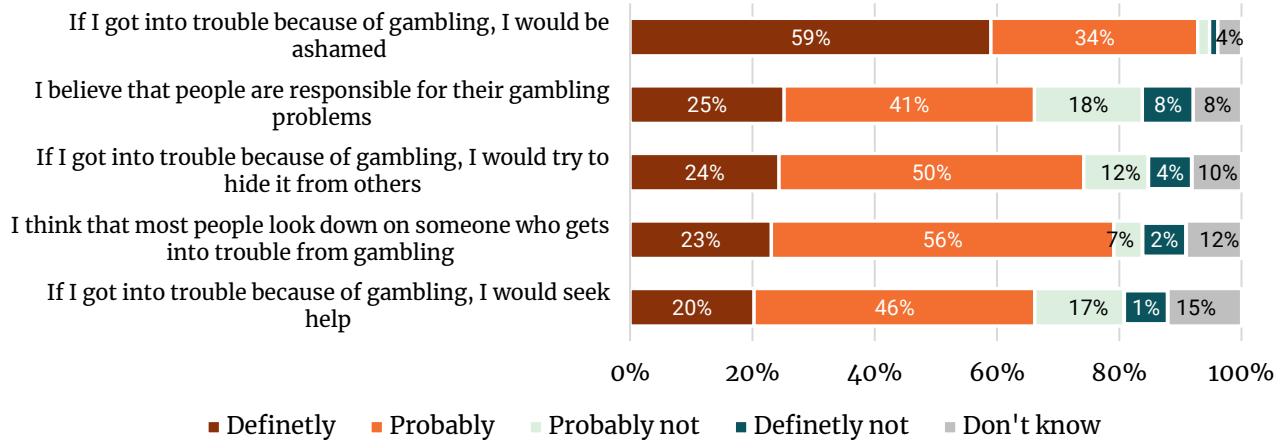
and 34 percent of the non-online players indicate this level of acceptance of gambling. These figures contrast with the perception of non-players, where only 11% assume acceptance among their close friends.

People think negatively about the problems that arise from gambling

The vast majority of Dutch citizens (93%) agree with the statement that they would be ashamed if they got into trouble because of gambling. Likewise, a large majority (79%) think most people look down on someone who has got into trouble because of gambling, and three-quarters (74%) would try to hide it from other people if he or she got into trouble because of gambling. Among online players, shame plays less of a role than among non-players and non-online players (78% versus 95% and 92% respectively). Moreover, this taboo does not prevent people from seeking help: two-thirds of players and non-players (66%) do expect to seek help if they ever get into trouble. Also players themselves do not experience a higher barrier to seeking help.

Figure 4 - Can you indicate the extent to which the following statements apply or do not apply to you?

Base: all Dutch citizens, n=3,366.



Majority expects gambling to lead to problems

The majority of Dutch citizens think that playing games of chance leads to problems with money and income (87%), mental health (83%), relationships with partner(s), family and friends (82%), work and/or school (80%) and physical health (64%). In the area of physical health, the proportion expecting no problems is relatively the highest (28%). In general, non-players feel that problems are more likely to arise than players. Differences can also be seen between online players and non-online players, with the former estimating the likelihood of problems at a lower level than the latter. For example, 77 percent of non-online players says they expect that playing games of chance can lead to problems with money and income, compared to 61 percent of online players.

Support organisations relatively unknown

Most players are not familiar with the organisations that offer help for gambling problems. For example, the majority have never heard of Loket Kansspel (now: Openovergokken.nl), CRUKS (also known as ‘Gokstop’) and Stichting AGOG; only a small group (2 to 4%) knows exactly what these organisations do or has ever had contact with them. These figures are similar to the 2024 survey, in which 2 to 3 percent were aware of them. The name familiarity of Stichting 113 (suicide prevention) is somewhat higher than that of the other organisations.

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