

## Summary and conclusions

### Summary

The survey into participation in foreign games of chance was carried out for the fifth time in 2004, following previous measurements in 1996, 1998, 2000 en 2002. Due to the low percentage of participants in foreign games of chance among the Dutch population, the size of the net random sample survey was small in a number of cases (in 2004, the sample size is n=214). The survey results are reported on the basis of economic units.

#### *Number of players foreign games of chance*

The percentage of economic units in the Netherlands that has in the past 12 months participated in one or more foreign games of chance is 4.7% in 2004. This is a decrease compared to the previous measurement. In absolute numbers it involves some 391,000 economic units that participate in foreign games of chance.

#### *Total participation number of foreign games of chance*

In 2004 economic units participate in an average of 1.17 foreign games of chance. This average is slightly lower than in 2002. It involves a total of some 457,000 participations.

#### *Shares of foreign games of chance*

The shares of the foreign games of chance are:

- German lotto via system game (for instance ABC lotto, Combiplay, ENI-lotto, Dr. Geissler, ILM club, Lotto Team or Stargames): 20%
- German lotto: 20%
- Süddeutsche Klassenlotterie (SKL): 18%
- Nordwestdeutsche Klassenlotterie (NKL): 26%
- National Lottery (English lotto): 1%
- (Sports)betting/bookmaking (for instance Ladbrokes): 2%
- Other foreign games of chance: 13%

This makes the German lotto the main foreign game of chance (40% of the total). The German games of chance together take up 84% of the total market.

#### *Spending on foreign games of chance*

The total amount spent on foreign games of chance in 2004 is 67 million euro. This equals 4% of the amount spent on domestic games of chance in the comparable gaming period (2003).

The average amount spent per player is about 172 euro in 2004. The average amount spent on each game of chance is about 148 euro. In 2004, the system games are responsible for a total spending amount of 17 million euro, with turnovers of 17 million euro for the German lotto (total of 34 million euro including system games), 11 million euro for SKL and 12 million euro for NKL. The total combined amount spent on German games of chance in 2004 therefore adds up to 57 million euro.

## **Conclusions**

The survey into participation in foreign games of chance has now been carried out five times. Based on this information, we now have a good impression of trends in this area. Overall, the situation seems rather stable:

- The total amount spent on foreign games of chance is fairly constant;
- The total group of players every time consists for a small part of regular players and for a large part of newcomers that quit quickly again;
- There are hardly any shocking developments in the distribution of players over spending categories;
- The German games of chance always form the principal part in the foreign games of chance.