



Illuminating the invisible Dutch game market

The first granular report on game popularity, player search intent, and lobby visibility in the Netherlands online casino market

GAMING IN HOLLAND

Prepared for Gaming in Holland

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Chairman of Blask

Legal disclaimer

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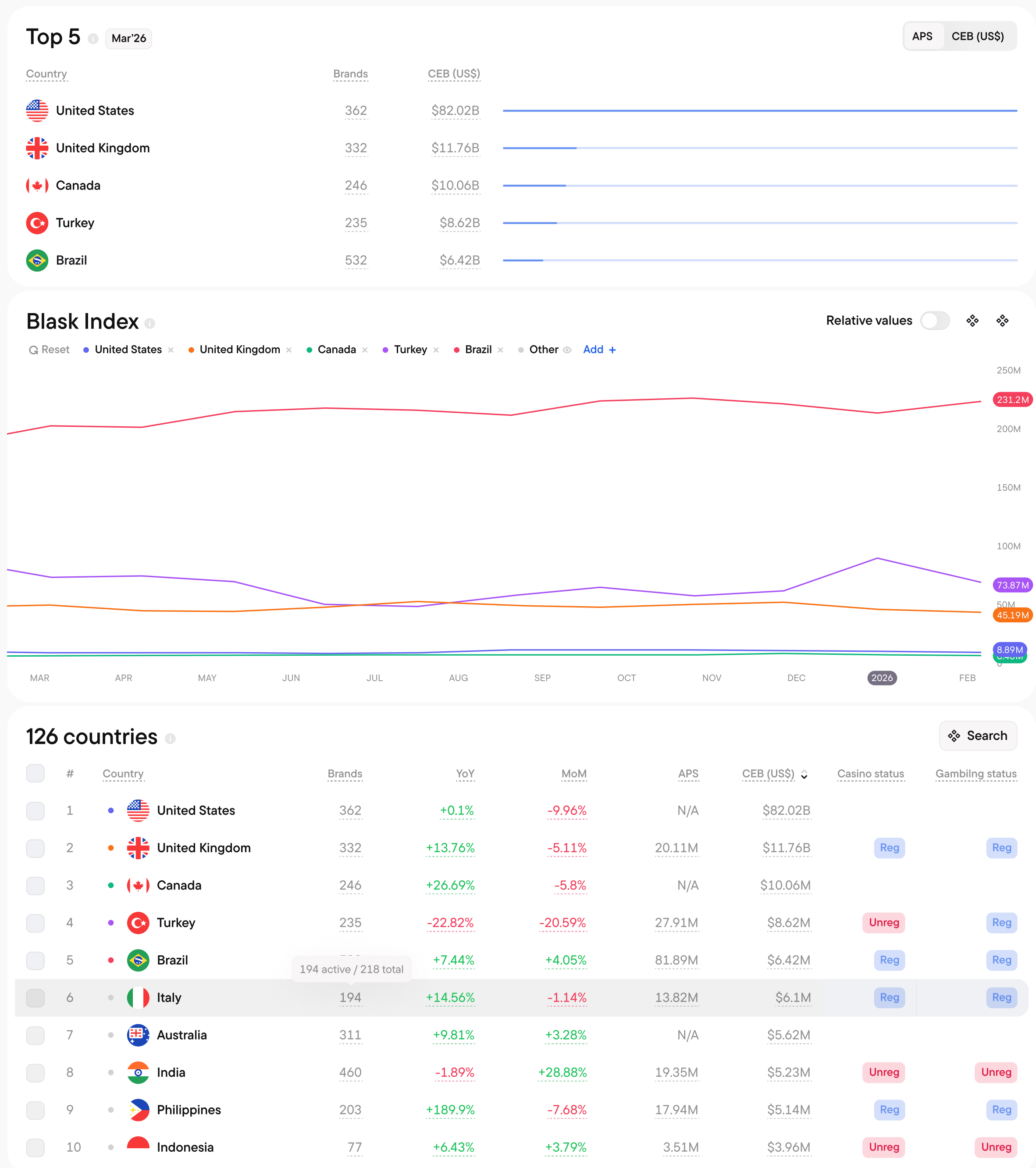
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What is Blask?

Blask is an AI analytics platform for iGaming. It unifies broadly distributed and fragmented data from domestic and offshore operators in one place, delivering a single, reliable view of market dynamics and complete global- and country-level perspectives of market share trends.

Artificial Intelligence powers Blask's proprietary technology. It detects key signals and converts them into clear, visual metrics, updated hourly, enabling deep analysis and precise trend tracking across the industry.

Blask makes the invisible visible. We replace legacy data sources with low-latency, high-frequency market data, reports and intelligence.



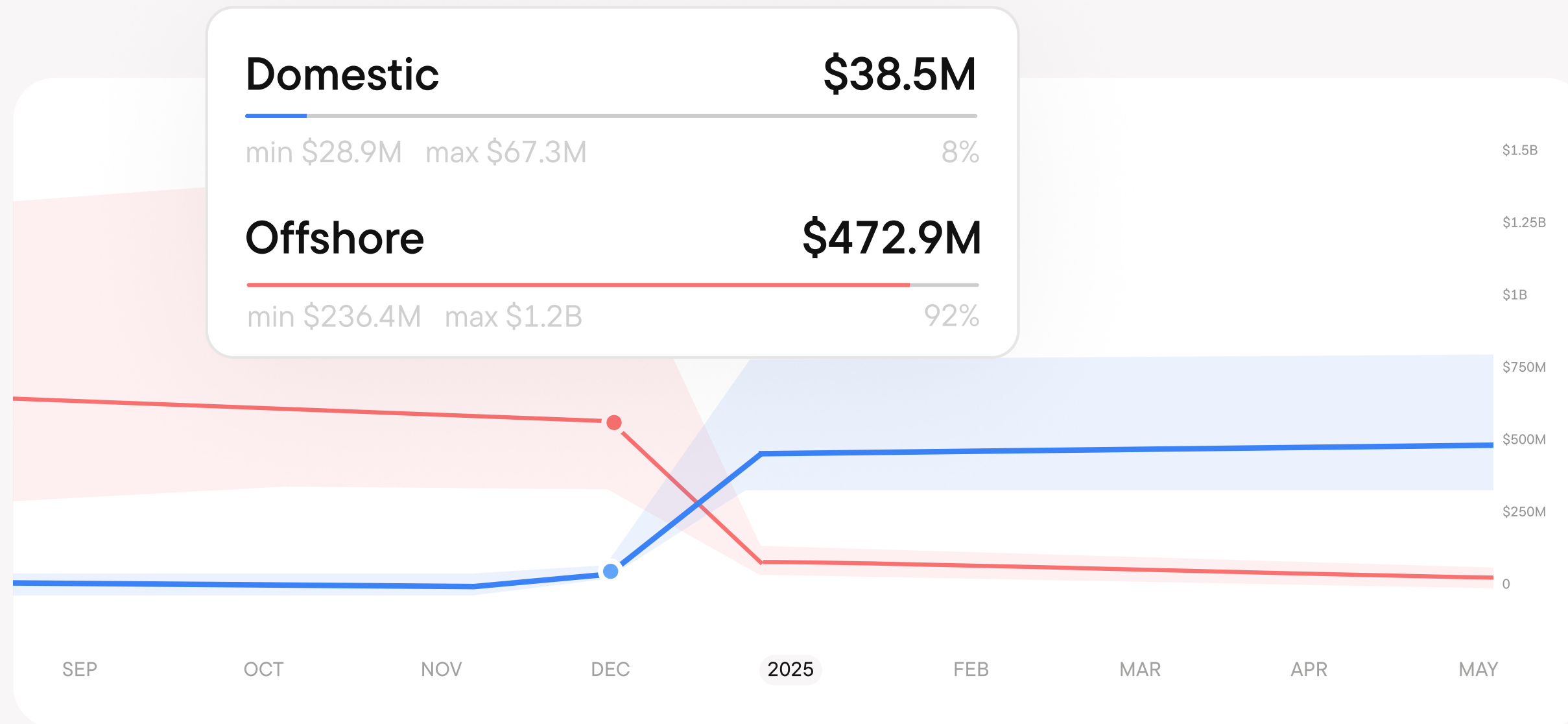
Domestic vs Offshore

CEB methodology

Blask identifies all brands in the market and classifies them into 2 categories: domestic and offshore. We check official lists and watch real activity online to see who gets attention — that's the Blask Index.

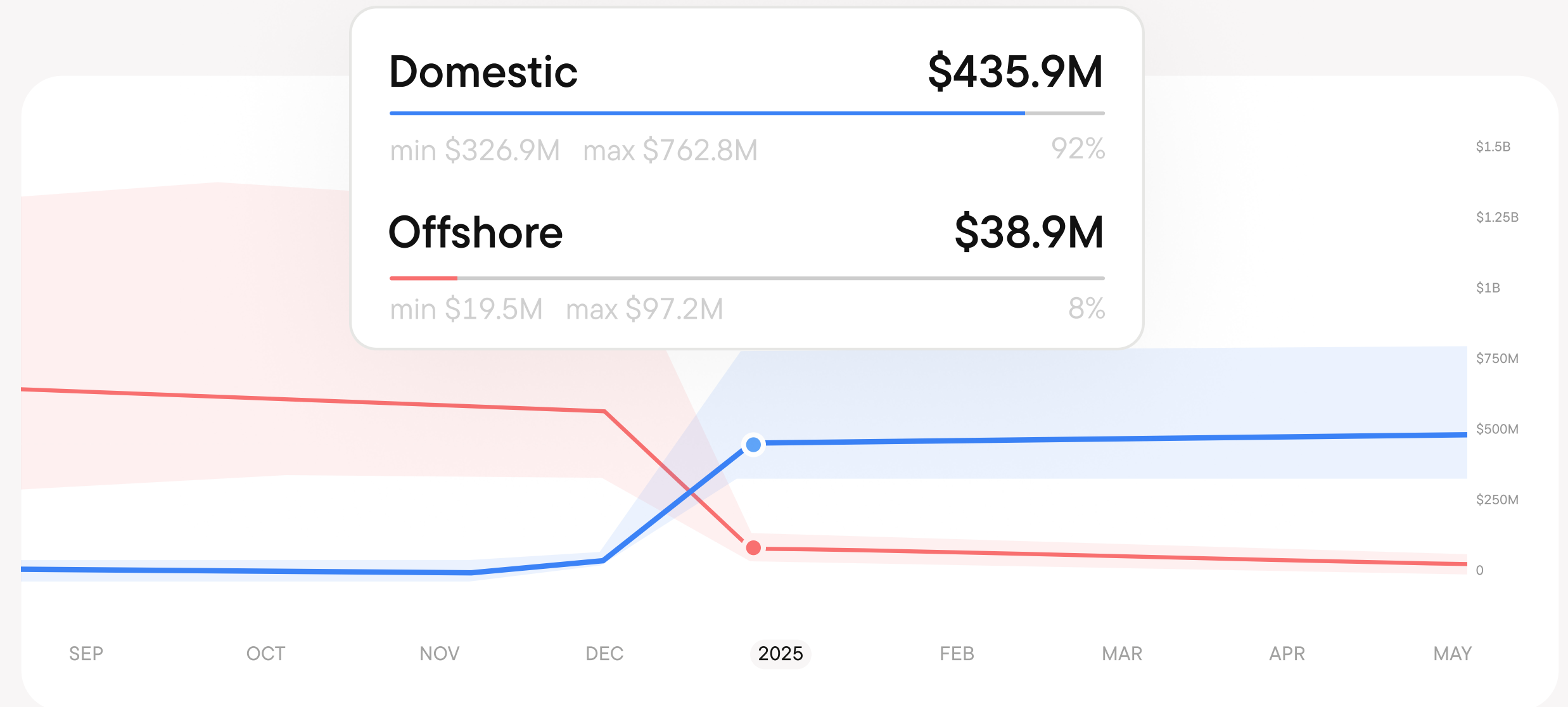
This is a simplified explanation of our methodology. We would be glad to explain in more detail.

Then we estimate CEB — how much money each brand should make. For domestic brands, we start from trusted market totals and taxes, then split by brand. For offshore brands, we use behavior and simple benchmarks. Both sides add up to the whole market, so you can see how the picture shifts when the rules change.



Brazil before full regulation (Dec 2024)

Domestic ≈ \$38.5M (8%), Offshore ≈ \$472.9M (92%)



After regulation (Jan 2025)

Domestic ≈ \$435.9M (92%), Offshore ≈ \$38.9M (8%) — a sharp shift from offshore to domestic operators.

Blask Games: see both sides of performance

1000+ sites tracked

40000+ games monitored

Daily game positions update

Monthly player interest update



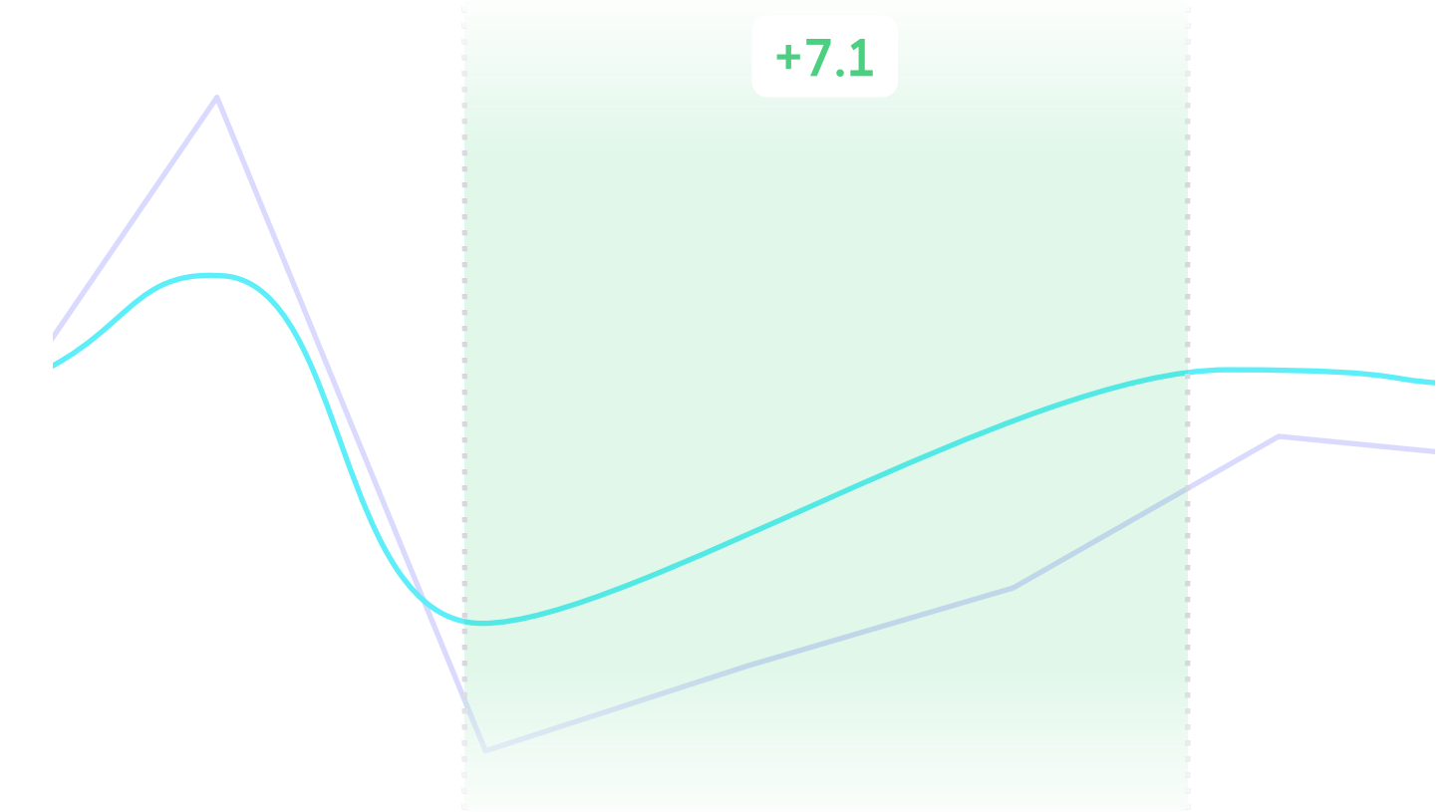
Market-ready picks

Spot rising titles early with demand + exposure trends



Placement optimization

Find gaps by operator/country and fix lobby order



Confident investment

Focus production, UA, and partnerships where upside is real

Game Visibility Rank (GVR)



GVR 23.3

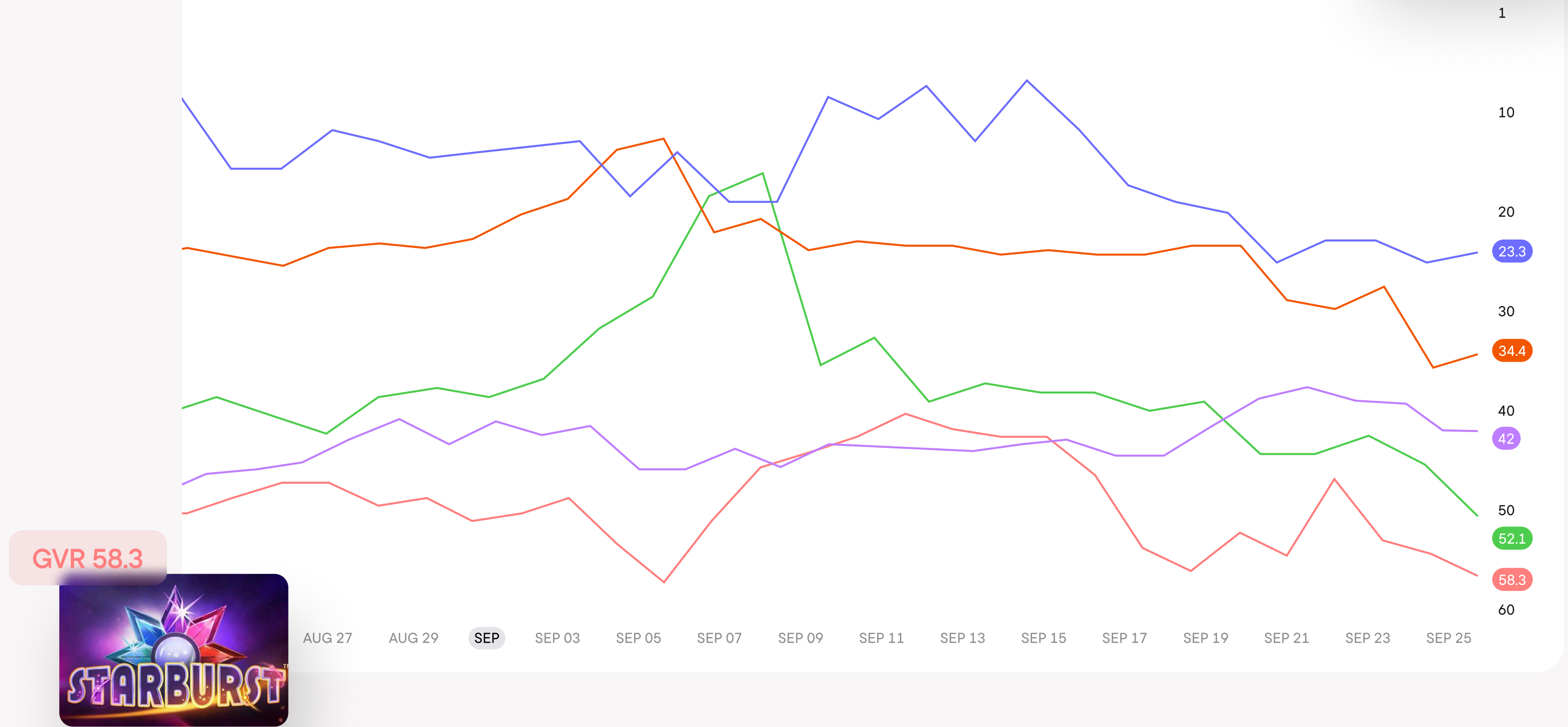


GVR 42

GVR counts how many games a player must pass to reach a title. Track it by country, operator, and provider to see exposure, promotions, and priority shifts.

Avg Lobby GVR

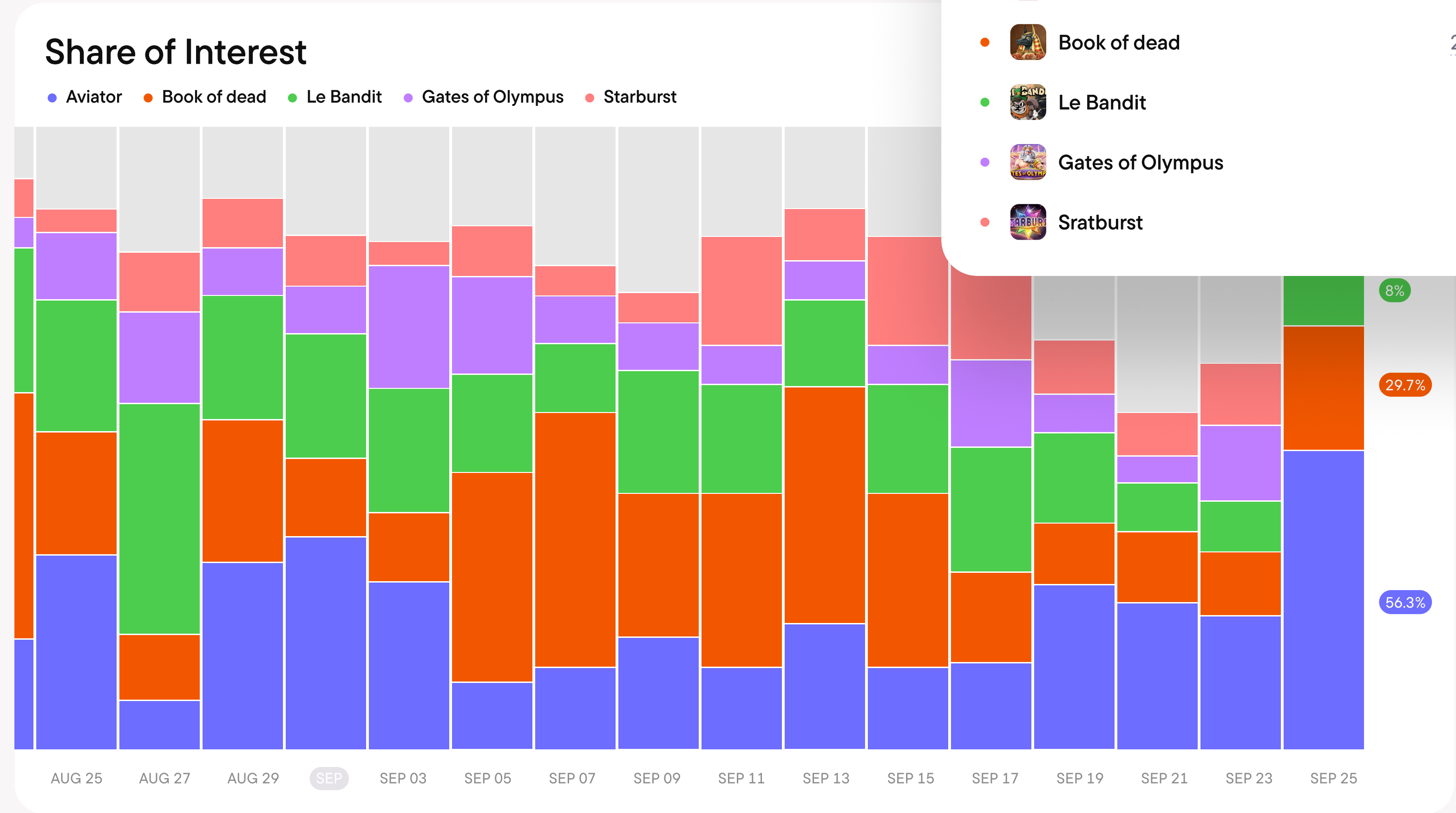
● Aviator ● Book of dead ● Le Bandit ● Gates of Olympus ● Starburst



GVR 58.3

Blask Index and Share of Interest (Sol)

Blask Index measures the intensity of real player interest; Sol shows the share a game captures within its category.



Games in Brazil

Brand	SOI
Aviator	56.3 %
Book of dead	29.7 %
Le Bandit	8 %
Gates of Olympus	2 %
Sratburst	3 %

Key findings

1 **NL demand is not slot-first.**

In Q1 2026, Live Dealer search demand was higher than Slots, while Blackjack alone captured 21.76% of game-specific player search interest.

2 **The licensed lobby does not fully reflect player intent.**

Licensed operators still give the visible shelf to slots: Slots account for 80.5% of licensed top-10 placements and 90.4% of exported top-30 Casino Page placements.

3 **Blackjack is the clearest player-demand signal.**

Blackjack holds roughly 1 in 5 NL game-specific searches, while Book of Dead does not appear in the player-demand top 10.

4 **The active NL market is broader than license holders.**

Blask currently tracks 243 active NL operators: 28 local/licensed and 215 offshore/unlicensed.

5 **Offshore is the product-gap lens.**

Games analytics is available for 75 operators: 22 local/licensed and 53 offshore/unlicensed. Offshore shelves are also slot-led, but they surface a broader alternative-mechanics layer, including Dice, Crash, Instant Win, Plinko and Mine Games.

How many brands are active in NL right now?

Blask found

April 2026

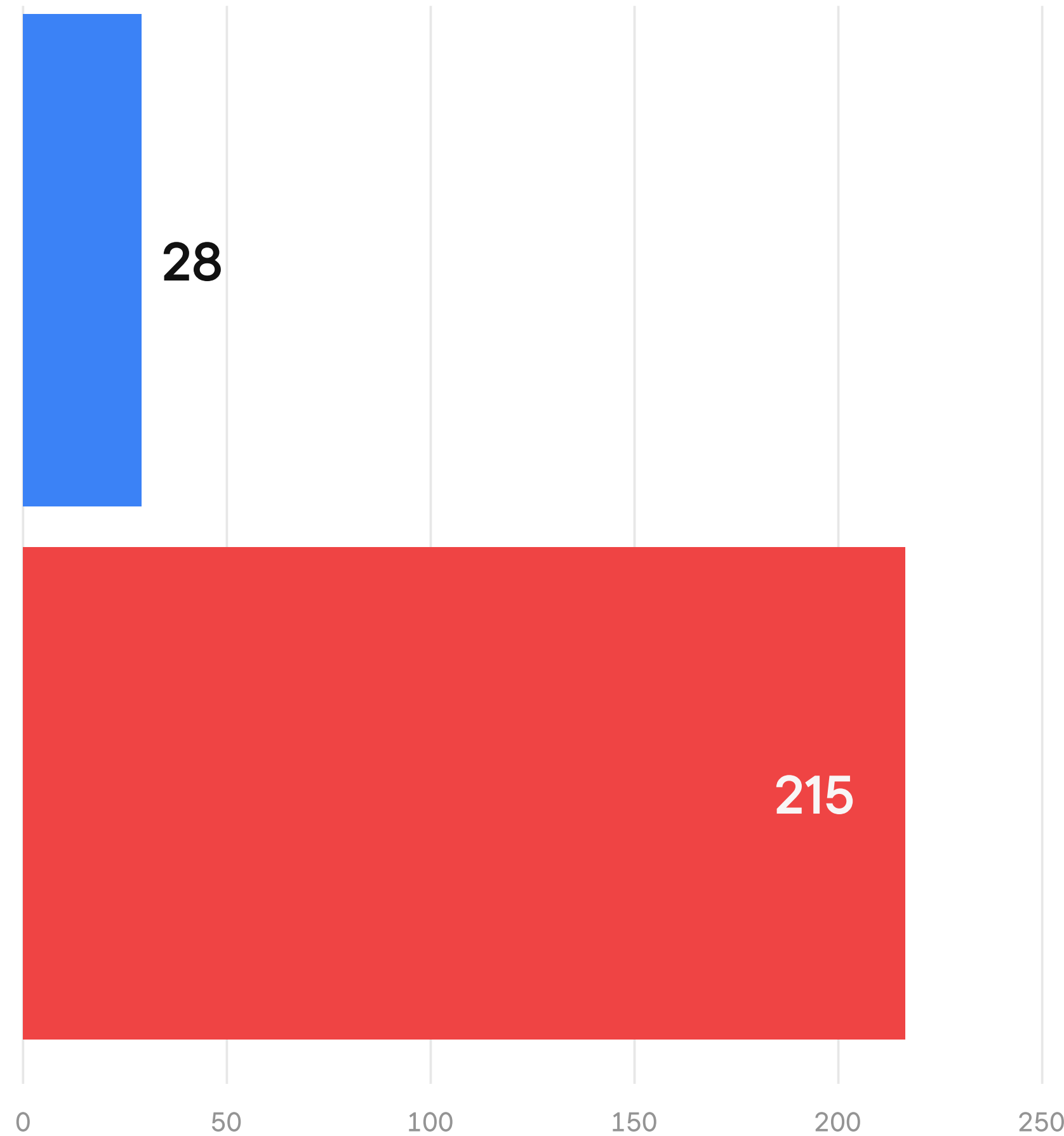
The regulated market has 28 licensed operators.
But the Dutch player is choosing from 243.

Licensed brands
12% of the active
competitive set

28

Offshore brands
88% of the active
competitive set

215



Among the 215 offshore brands

48 non-domestic brands — brands that do not primarily target the Netherlands, but still show up in Dutch player demand because people search for them from inside the market

21 new operators — brands that appeared in Blask tracking between February and April 2026

Among the 215 offshore brands

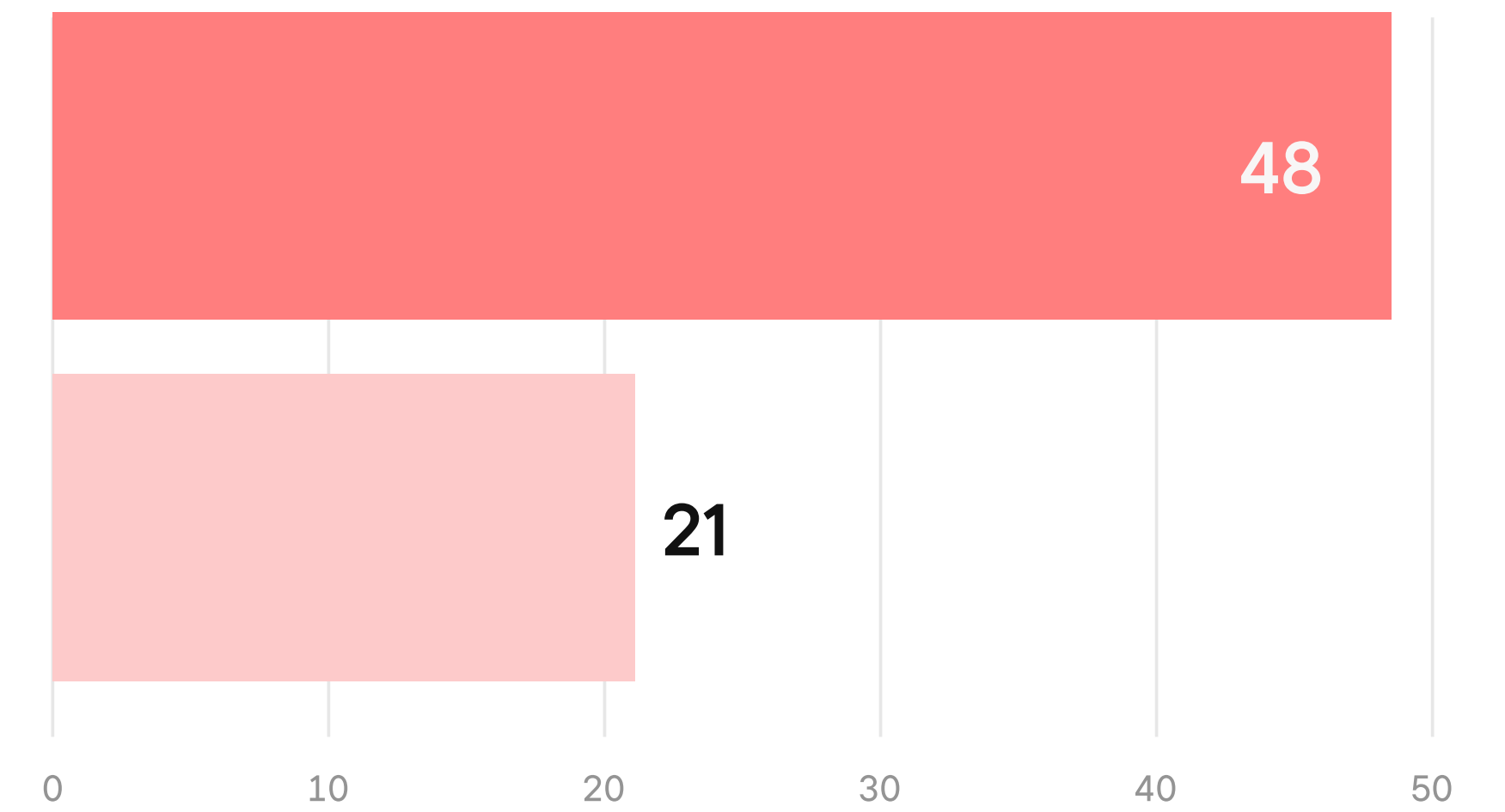
Feb-Apr 2026

Non-domestic brands

48

New operators

21



What share of user interest goes to offshore brands?

BAP — Brand's Accumulated Power = a brand's share of total iGaming demand in a market. Blask measures demand through player search intent: how actively people are looking for a specific brand.

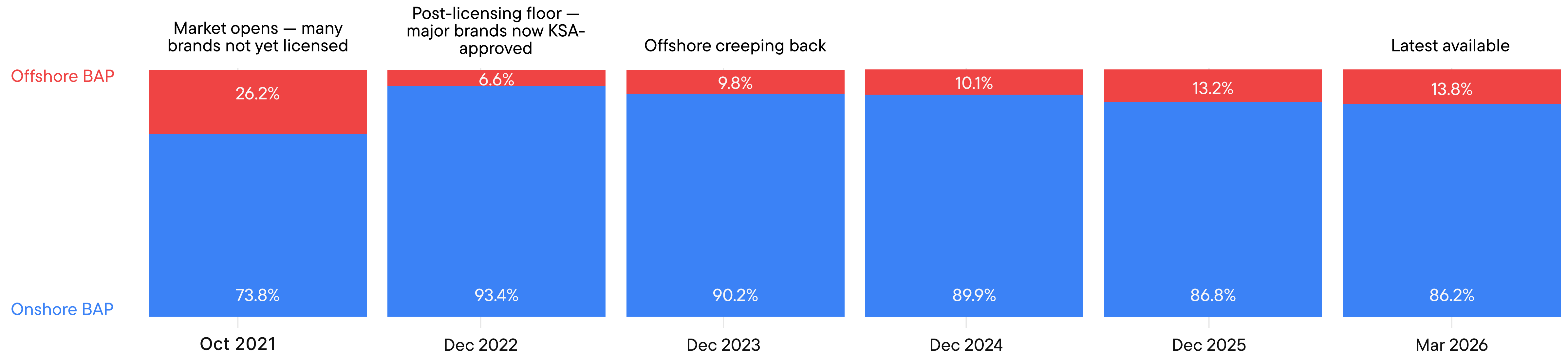
BAP tells you not how much a brand spends on marketing, but how much of the market's attention it has actually captured. A brand with high BAP is the one players think of first when they decide to play.

The offshore share bottomed out at 6.6% in late 2022 — and has been climbing back ever since.

As of March 2026: 1 in 8 Dutch player searches goes to an offshore brand.

Offshore brand interest share

April 2026



What Blask measures and how

Blask Index

Total search demand volume for a category or brand in a given market and period. Aggregated from Google query data.

Used in this deck

Market size, category comparison,
Live vs Slots ratios

GVR (Game Visibility Rank)

Average lobby position of a game across all brands carrying it. Position 1 = top-left, first row. Lower = more visible.

Used in this deck

Lobby visibility analysis.
“Who owns the shelf”

Player Interest

Each game's share of total game-specific search demand in NL, aggregated over the measured period. A game at 19% means roughly 1 in 5 game-specific searches includes that title.

Used in this deck

Individual game demand ranking

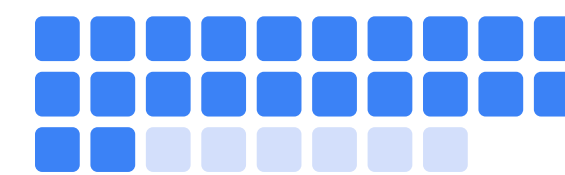
Dataset scope

Games analytics coverage means operators with daily game/lobby data available in Blask Games.

Player Interest remains a market-level search signal and is not split by operator status.

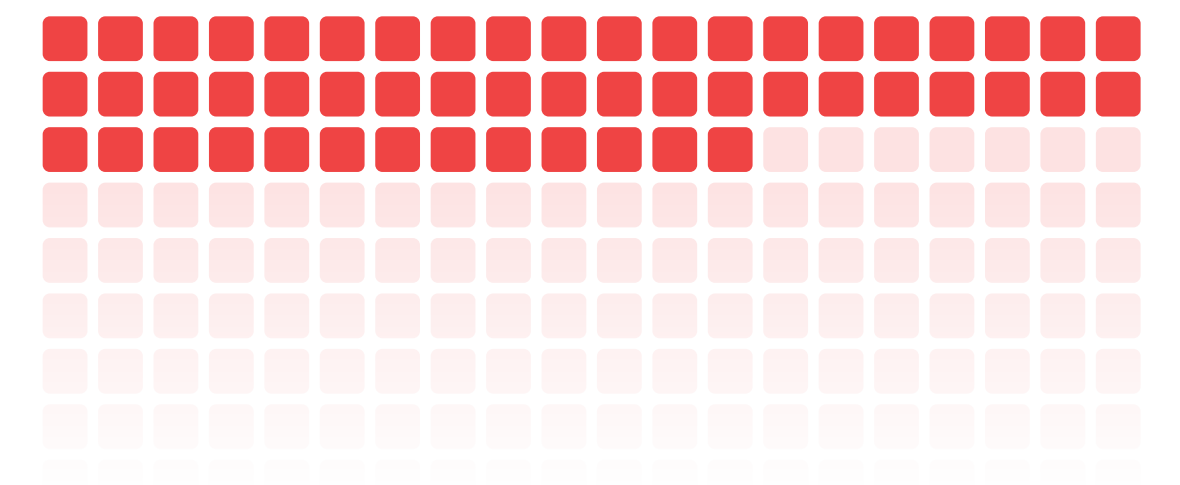
Licensed operators

22 / 28 tracked



Offshore operators

53 / 215 tracked



Licensed operators still give the visible shelf to slots

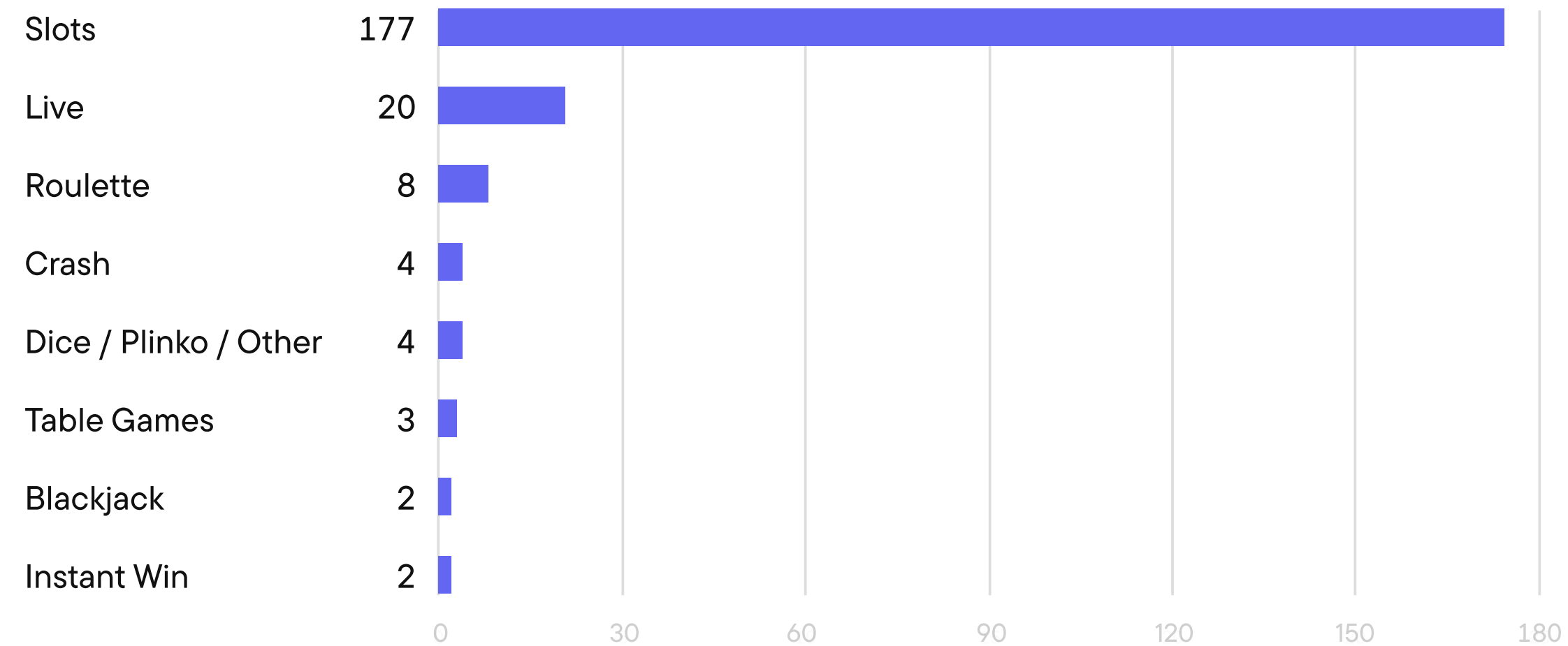
Dataset: 22 licensed operators, top 10 most visible games per operator. Snapshot April 27, 2026.

80.5%

of licensed Top 10 placements are Slots, despite Dutch player demand skewing toward Live Dealer and Blackjack.

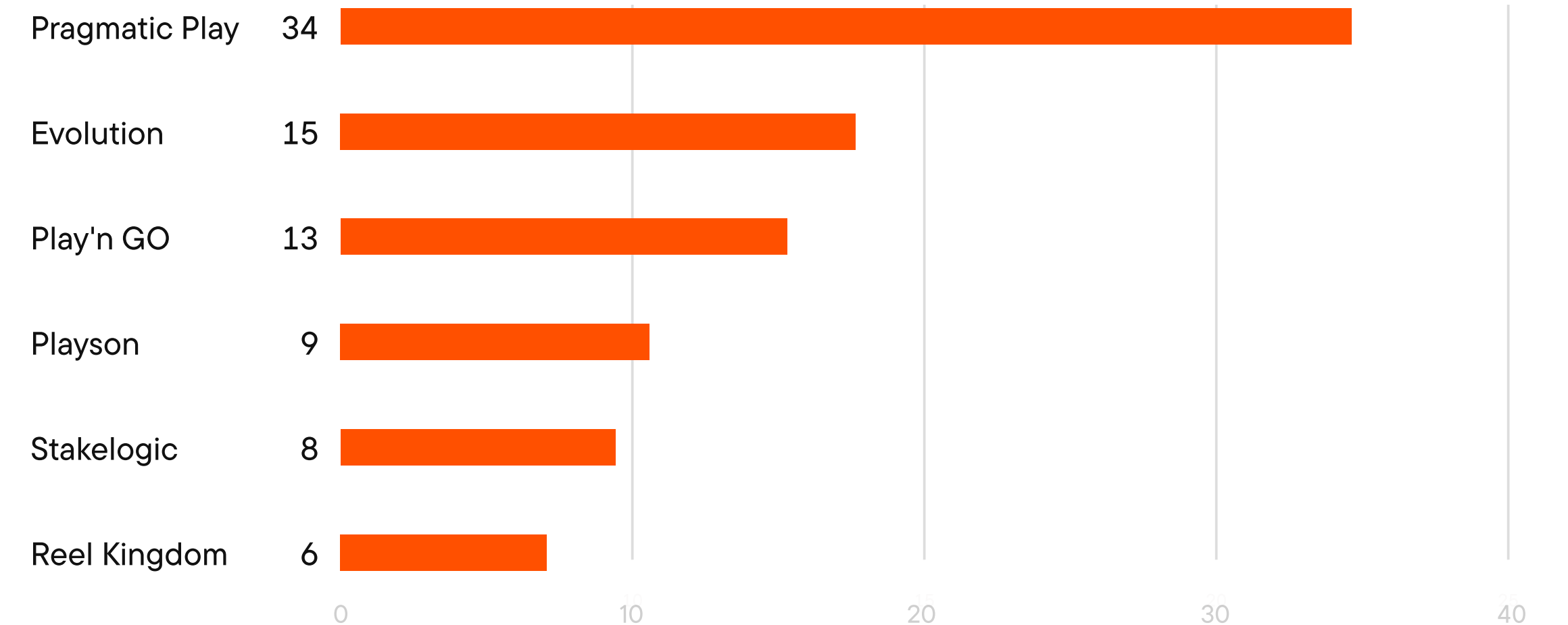
Genre

27 Apr 2026



Providers

27 Apr 2026



Offshore top shelves are also slot-led, but the long tail changes

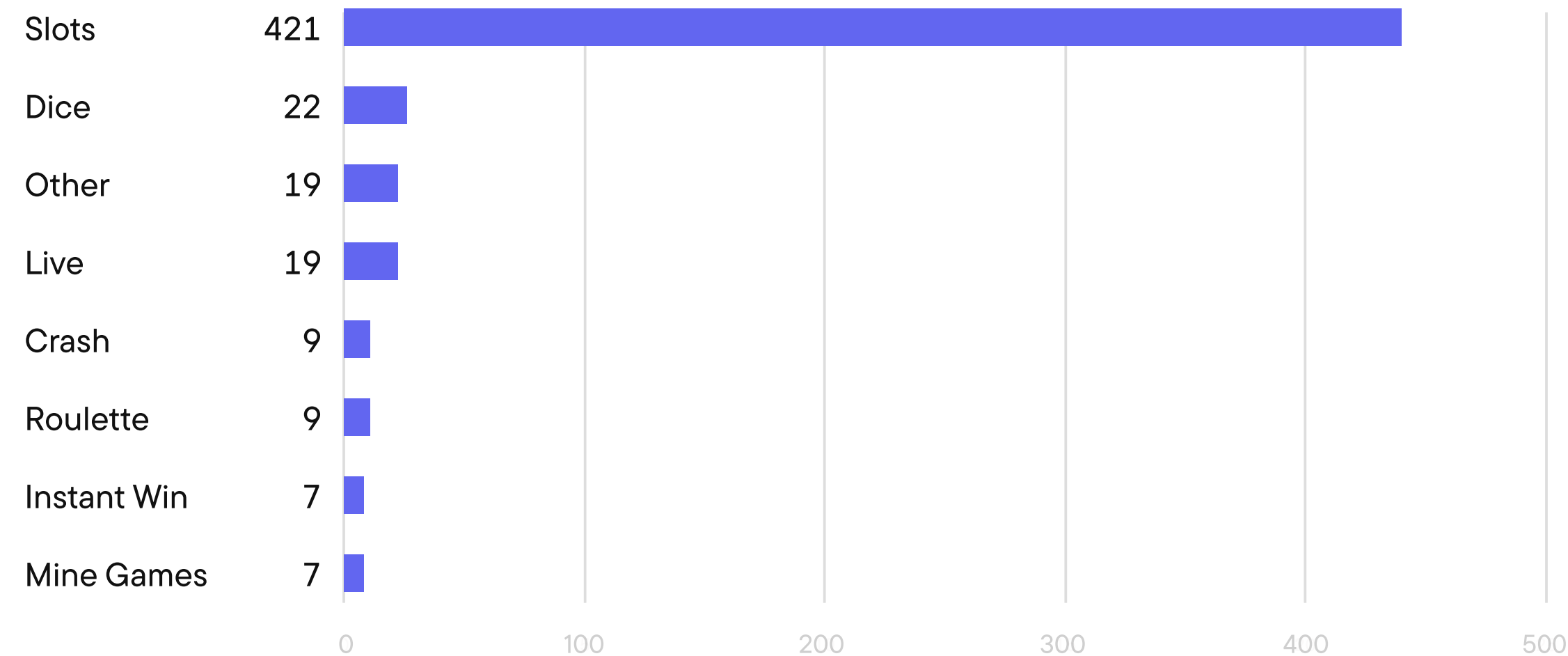
Dataset: 53 offshore operators, top 10 most visible games per operator. Snapshot April 27, 2026.

Key insight

Offshore operators prioritize alternative mechanics ([Dice](#), [Mines](#), [Plinko](#), [Crash](#)), pushing [Hacksaw Gaming](#) to the #2 provider spot. The "product gap" lies in shelf composition.

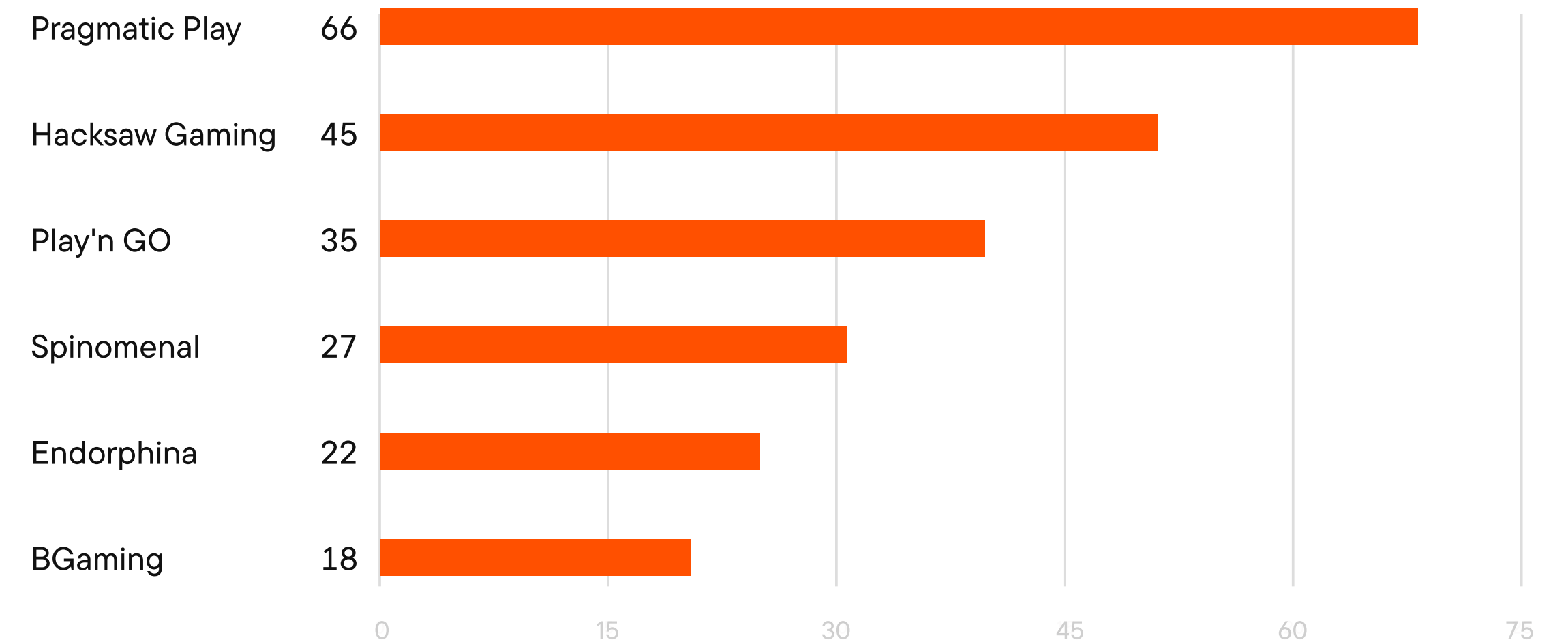
Genre

27 Apr 2026



Providers

27 Apr 2026










Most repeated titles across licensed operators' top 10s

Dataset: 22 licensed operators, top 10 most visible games per operator. Snapshot April 27, 2026.

Licensed lobbies are genre-concentrated (80% slots) but title-fragmented: even the most popular games appear in only 18% of operators' top 10s. Despite Dutch search demand for Live Dealer and Blackjack, visibility remains slot-heavy.

Pragmatic Play and Evolution lead, but the broader shelf is fragmented. The key question for offshore analysis: do unlicensed brands exploit this fragmentation or prioritize formats unavailable in the licensed market?










#	Game	Provider	Genre	Appears in Top 10 of	Licensed operators
1	 Big Bass Splash	Pocket Games Soft	Slots	4	Unibet, OneCasino, LeoVegas, BetMGM
2	 Book of Dead	Pocket Games Soft	Slots	4	Unibet, BetCity, 711, LeoVegas
3	 Pirots 4	Stake Originals	Slots	4	Holland Casino, 711, 777, Circus
4	 Sweet Bonanza	Spribe	Slots	4	711, Kansino, ComeOn, Circus
5	 Crazy Time	Pocket Games Soft	Live	3	Unibet, Bet365, Jacks.nl
6	 Gates of Olympus	Pocket Games Soft	Slots	3	BetCity, Jacks.nl, TonyBet
7	 Gates of Olympus Roulette	Various provider	Roulette	3	Betnation, ComeOn, 888 Casino

Most repeated titles across offshore operators' top 10s

Dataset: 22 licensed operators, top 10 most visible games per operator. Snapshot April 27, 2026.

Offshore lobbies mirror licensed ones in slot dominance (~80%), but the "product gap" lies in shelf composition. Offshore operators prioritize alternative mechanics: Dice, Mines, Plinko, and Crash, pushing Hacksaw to the #2 provider spot.

While still title-fragmented, the offshore shelf surfaces an aggressive long tail of formats that remain largely invisible in the licensed market.





#	Game	Provider	Genre	Appears in Top 10 of	Offshore operators
1	 Book of Dead	Play'n GO	Slots	7	Instaspin, Vlad Casino, BetRebels, Touchcasino, Blu Vegas, Simsinos Casino, Hispin
2	 Pure Ecstasy	Pateplay	Slots	5	Jack Top, Wizebets, FGFOX, BetZard, Corgi Slot
3	 Sweet Bonanza 1000	Pragmatic Play	Slots	5	Jack Top, Hash Lucky, Cusco Casino, BetZard, Blu Vegas
4	 Jewel Boost Reels	Mascot Gaming	Slots	4	Jack Top, Wizebets, FGFOX, Corgi Slot
5	 3 Irish Treasures	Spinomenal	Slots	4	Jack Top, Wizebets, FGFOX, Corgi Slot
6	 Fruits Treasure Party	Spinomenal	Slots	4	Jack Top, Wizebets, FGFOX, Corgi Slot
7	 Mine Slot 2	InOut Games	Other	4	Jack Top, NewLucky, FGFOX, BetZard
8	 Le Bandit	Hacksaw Gaming	Slots	4	RedDice, Lucky Block, LocoWin, Hispin
9	 100 Super Dice	Amusnet	Dice	4	Casino Belgium, Carousel, Casino333, Family Game Online

Most visible games at Main page (licensed)

Dataset: 22 licensed operators, top 30 most visible games per operator. Snapshot April 27, 2026. GVR = average game position in an operator's casino lobby/catalogue. Lower GVR = higher visibility.

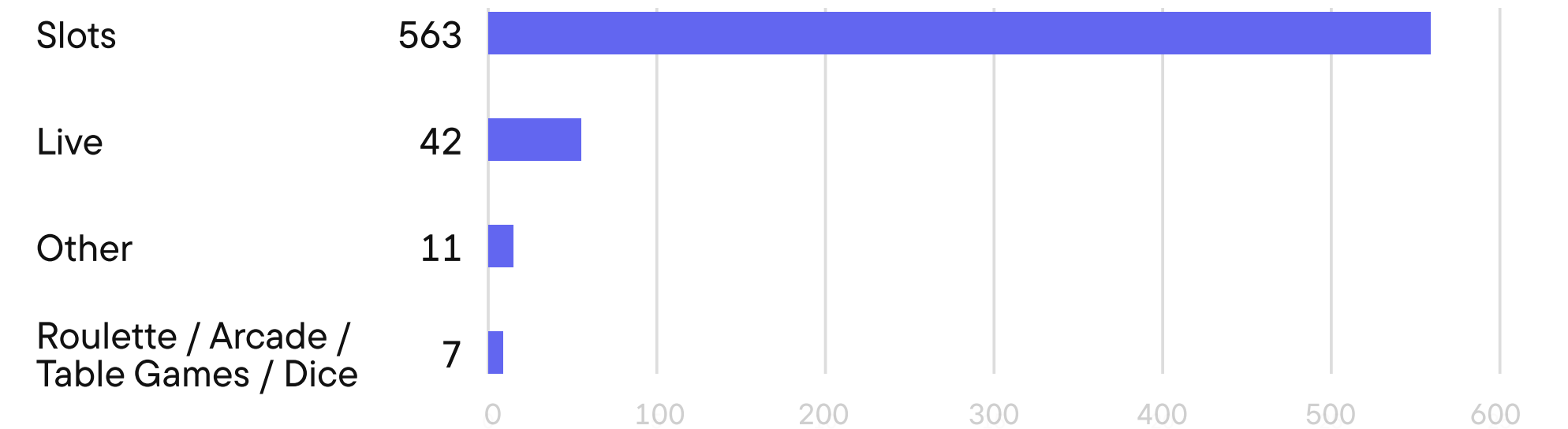
Repeated #1 Game

27 Apr 2026

#	Game	Provider	Genre	Appears in Top 10 of	In top 30 of	Operators where #1
1	 Sweet Bonanza	Pragmatic Play	Slots	2	8	Toto, Kansino
2	 Pirots 4	Elk Studios	Slots	2	8	Holland Casino, 711
3	 Gates of Olympus 1000	Pragmatic Play	Slots	2	8	777, TonyBet
4	 Gates of Olympus Super Scatter	Pragmatic Play	Slots	2	5	777, TonyBet

Genre mix

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





Across licensed operators, Main page is slot-led but not title-led. Slots account for 90.4% of exported top-30 placements, but no #1 game appears as the top title for more than two operators.

Most visible games at Main page (offshore)

Dataset: 53 offshore operators, top 30 most visible games per operator. Snapshot April 27, 2026. GVR = average game position in an operator's casino lobby/catalogue. Lower GVR = higher visibility.

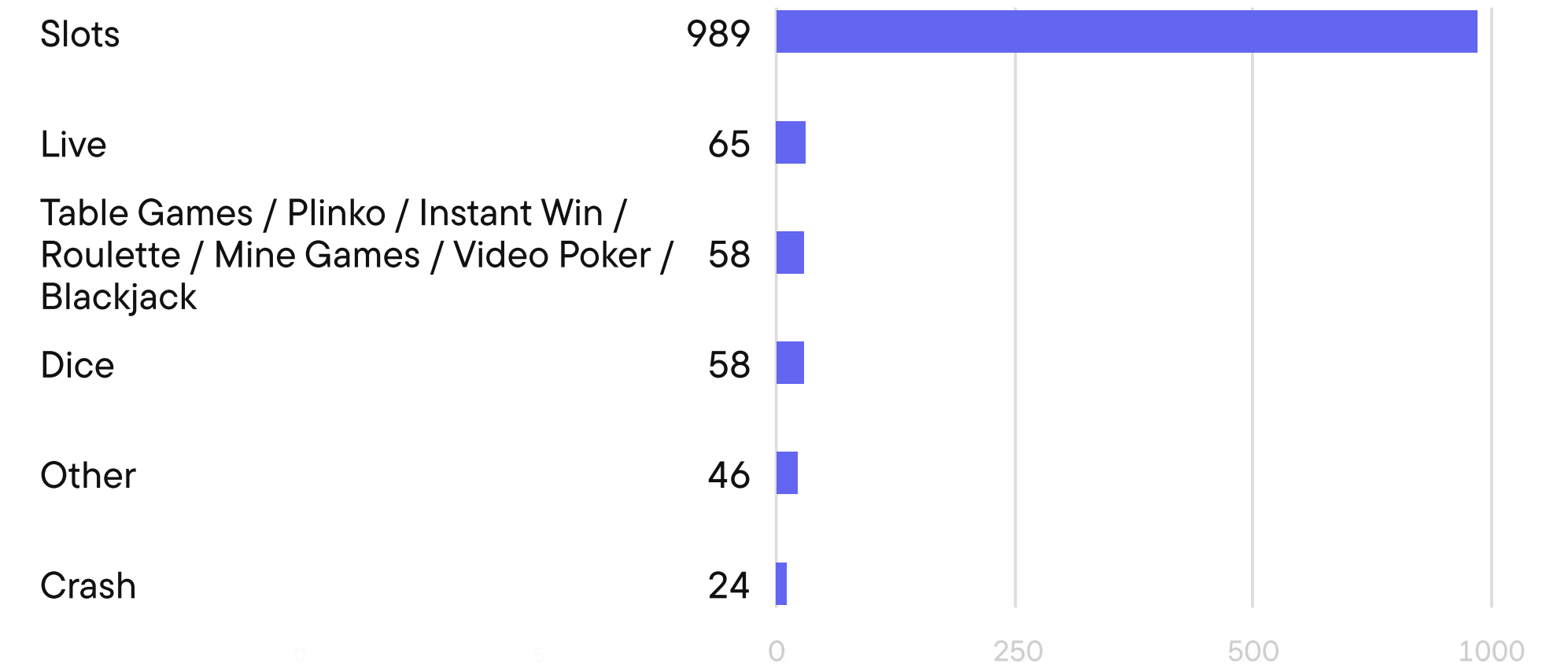
Repeated #1 Game

27 Apr 2026

#	Game	Provider	Genre	Operators where visible
1	 Wanted Dead or a Wild	Hacksaw Gaming	Slots	13
2	 Le Bandit	Hacksaw Gaming	Slots	11
3	 Preach TV	Shady Lady	Slots	10
4	 Book of Dead	Play'n GO	Slots	10
5	 Sweet Bonanza 1000	Pragmatic Play	Slots	8
6	 Gates of Olympus 1000	Pragmatic Play	Slots	8
7	 Marlin Masters	Hacksaw Gaming	Slots	8
8	 Wild Cash x9990	BGaming	Slots	6
9	 Legacy of Dead	Play'n GO	Slots	6
10	 Bonsai Gold Hold and Win	Novomatic	Slots	6

Genre mix

27 Apr 2026



Offshore Main pages are still slot-led, but the visible shelf looks different from licensed operators. Hacksaw titles are the clearest offshore shelf signal: “Wanted Dead or a Wild” and “Le Bandit” appear at 13 and 11 offshore operators.

Crash is easier to find **offshore**

Licensed

Segment	Operators where visible
Operators checked	22
Operators with Crash in top 100	7
Best Crash position	#44
Median best Crash position	#70

Offshore

Segment	Operators where visible
Operators checked	53
Operators with Crash in top 100	20
Best Crash position	#1
Median best Crash position	#32

Key finding

















The licensed market does not completely lack Crash games, but Crash is harder to discover.

Only 7 of 22 licensed operators show Crash in the top 100 Casino Page rows, and the best Crash position is #44.

Offshore operators show a different visibility pattern: Crash appears for 20 operators, reaches positions #1 and #2.

Most visible Crash examples

27 Apr 2026

#	Segment	Operator	Game	Provider	GVR position
1	Offshore	 Kokobet	 Chicken Road	InOut Games	#1
2	Offshore	 IgoBet	 Chicken Road	InOut Games	#2
3	Offshore	 Jack Top	 Chicken Road	InOut Games	#14
4	Offshore	 Lucky Block	 Aviator	Spribe	#15
5	Offshore	 Hispin	 Aviator	Spribe	#19
6	Licensed	 Betnation	 JetX	SmartSoft Gaming	#44
7	Licensed	 ComeOn	 Thunderstruck FlyX	Buck Stakes Enterta...	#57
8	Licensed	 Bet365	 Aviator	Spribe	#63

Offshore lobbies show a broader genre shelf

Key finding

Slot share is nearly identical (~83% vs 82%), but composition differs: licensed brands over-index on Live and Table Games, while offshore operators prioritize alternative mechanics like Dice, Crash, and Plinko.

Offshore lobbies show a broader genre shelf


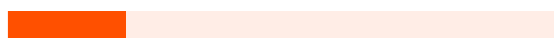

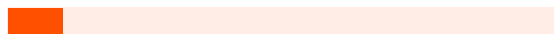

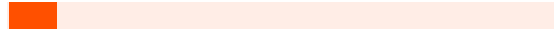

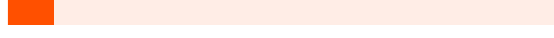



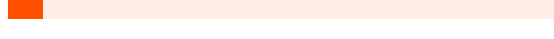

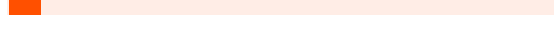

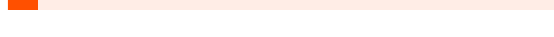

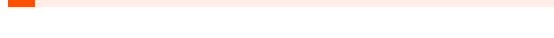

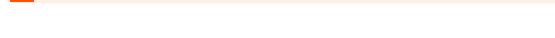
• Licensed count / share • Offshore count / share

#	Genre	Licensed count / share	Offshore count / share	Readout
1	Slots	83.5%	81.9%	Slots dominate both sides; this is not a "slots vs no slots" story.
2	Live	7.6%	3.4%	Licensed catalogues over-index on Live in this sample.
3	Dice	0.3%	2.3%	Offshore is about 8x higher by sample share.
4	Crash	0.5%	1.3%	Offshore is about 2.5x higher by sample share.
5	Instant Win	0.8%	2.0%	Offshore has a larger instant-play layer.
6	Plinko	0.3%	0.5%	Present on both sides, slightly higher offshore.
7	Mine Games	0.2%	0.4%	Present on both sides, slightly higher offshore.
8	Table Games	1.5%	1.1%	Similar, with licensed slightly higher.
9	Roulette	1.7%	1.4%	Similar, with licensed slightly higher.
10	Other / untracked	3.6%	5.7%	Offshore has a broader residual long tail.

What Dutch players actually search for

SoI shows how much of that demand a specific game captures within its category. 521 games tracked, Mar 2025–Feb 2026.

Mar 2025–Feb 2026

#	Game	Provider	Genre	SOI	YoY	MoM
1	 Blackjack	Various provider	Live	21.76% 	+11.32%	+0.39%
2	 Crazy Time	Various provider	Live	6.44% 	+21.36%	+41.18%
3	 Pirots 4	Elk Studios	Slots	5.01% 	+6 920%	+12.28%
4	 Le Pharaoh	Hacksaw Gaming	Slots	4.30% 	+9.29%	+5.52%
5	 Sweet Bonanza	Pragmatic Play	Slots	3.57% 	+37.03%	+8.65%
6	 Sugar Rush 1000	Pragmatic Play	Slots	3.21% 	+2.20%	+46.53%
7	 Gates of Olympus	Pragmatic Play	Slots	3.17% 	+20.39%	+0.41%
8	 Gates of Olympus Super Scatter	Pragmatic Play	Slots	2.95% 	+327 100%	+12.03%
9	 Pirots 3	Elk Studios	Slots	2.43% 	+13.95%	+8.16%
10	 Mines	Spribe	Mine Games	2.13% 	N/A	N/A

What to do with the gap

The Dutch market is slot-led, but the demand and product gaps sit around live casino strength, search-led staples, and alternative mechanics.

Licensed operators

Catalogues are slot-led, but the search demand is anchored by Blackjack and Crazy Time. Offshore also carries a broader layer of alternative mechanics.

What to do next

Benchmark Blackjack / Live visibility against peers, then audit whether alternative mechanics are absent because of regulation, supply, or positioning.

Game suppliers

Slots still dominate, but offshore catalogues show more breadth in Dice, Crash, Instant Win, Plinko and Mine Games.

What to do next

Package alternative mechanics with compliance-ready framing for regulated operators, and separate “can launch now” formats from formats blocked by regulation.

Affiliates / media

Player search interest and licensed availability do not fully line up. Some formats players search for are easier to find offshore than onshore.

What to do next

Build comparison content around what is legally available in NL vs what players encounter offshore; keep licensed and offshore recommendations clearly separated.

#Blask

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