

Summary

1 Introduction

This *Report on Sport 2008* (*Rapportage sport 2008*) brings together the main statistical trends in sport in the Netherlands in the recent period 2003-2008. Special attention is devoted to the importance of exercise for health, the rise of the fitness culture and the collaboration between sport and education. The *Report on Sport 2008* is a co-production by the Netherlands Institute for Social Research/SCP, the Mulier Institute, Statistics Netherlands (CBS), the National Olympic Committee * Netherlands Sports Federation (NOC*NSF) and TNO Quality of Life. In addition, some chapters were written in full or in part by staff from various universities (Utrecht, Tilburg, Amsterdam and VU University Amsterdam), DSP-groep, the Netherlands Institute for Transport Policy Analysis (KIM) and the Dutch Consumer Protection Council (Consument en Veiligheid). The *Report on Sport* is funded partly by the Ministry of Health, Welfare and Sport.

2 Social trends

Some social trends in recent years have been beneficial for sport, others less so. One positive factor has been the further increase in the general education level. Disposable incomes were also higher in 2007 than in 2005, when purchasing power reached its lowest point to date in the new millennium. Perhaps less favourable was the fact that the average Dutch person's life became slightly busier; the total time spent on obligatory activities increased by 0.4 hours per week between 2000 and 2005, while the amount of free time people had at their disposal remained stable. The trend towards spending less and less time on maintaining social contacts has also continued in recent years. Fewer people join clubs and associations. In the long term, the health-related behaviour of the Dutch has improved; in the last few years, however, this progress appears to have come to a halt. In 2007, for example, there were just as many regular alcohol users and just as many smokers as in 2004. The percentage of overweight Dutch people has also changed little.

3 Developments in the policy on sport

The development of the sports policy network, the division of roles and tasks among the various partners in this network, and thus the design and direction of the policy, have developed further in recent years in line with the investment scenario. This means that partners in the sports policy network have become less dependent on government subsidies and concentrate on finding or creating their own niche in the network. The increased funds flows within sport and the growing instrumental

importance attached to this money is making the demand for effectiveness ever more urgent. The quantifying of policy objectives and the monitoring of results means the achievement of policy targets is increasingly being tested.

The decentralisation of central government tasks affords local authorities the opportunity to adopt a more integrated approach to sport and exercise, education, welfare, youth policy and health policy. The paradoxical effect of this is that it makes the policy on sport less transparent and uniform.

The government policy memorandum *Tijd voor Sport* (Time for Sport) was published in 2005 and was based on three core themes, namely 'exercise', 'taking part' and 'performance'. These still form the basis for government policy. Exercise is gaining importance in the battle against overweight; taking part fits in seamlessly with the goals of the fourth government under Prime Minister Jan Peter Balkenende; and performing and excelling are once again deemed acceptable. In order to realise the envisaged gains through sport, great efforts are being made to create healthy, well-equipped sports associations and clubs. A good deal of effort is being invested in encouraging participation in sport, i.e. stimulating the demand side of the sports market. However, this means that scant attention is devoted to the supply-side, especially sports facilities. One problem here is that the costs are borne by parties (local authorities) which receive few if any of the benefits of those investments (which accrue directly to businesses, health insurers and central government). A similar problem surrounds the funding of the organised sports infrastructure. Whether or not the government should be making a contribution here, in order to guarantee the achievement of gains ('sport as a means') into the future, is open to question.

The thrust of the NOC*NSF report on sport in the Netherlands (*Nederland sportland*) has in recent years become linked to the debate on the organisation of the Olympic Games in the Netherlands. That organisation demands the development of a geographical/economic vision of the Netherlands, in which a key place is accorded to the development of (conference) tourism, the leisure economy and the organisation of large-scale sports and other events.

4 Participation in sport

More people are taking part in sport in the Netherlands than ever before: 71% of the population participated in sport at least once in 2007, compared with 53% at the end of the 1970s. Moreover, 65% of the population were taking part in sport at least 12 times per year in 2007, compared with 61% in 2003. Participation in sport by members of non-Western ethnic minorities is lower than in the rest of the population, and the participation by the over-65s, people with a lower education level, lower income groups and people with moderate to severe impairments is still much lower than among the population as a whole.

There was a further decline between 2003 and 2007 in the proportion of the population who participate in sport as members of a sports club. Organised sport is thus continuing to lose market share. On the other hand, the proportion of people

taking part in sports competitions and training sessions stabilised. The existing differences in participation in competitions and training sessions between men and women and between younger and older sports participants have not reduced. Sports which have seen further growth in recent years are particularly fitness training, running and soccer.

5 Sports fans

Sports magazines had a core paid circulation of 1.5 million copies in 2007. In the same year, Dutch public and commercial broadcasters dedicated an average of more than 2,800 hours to sport. People spend an average of 87 hours watching sport broadcast on the Dutch public and commercial channels. One in three Dutch people attend a sporting match at least once a year.

Attending matches is becoming more and more popular. By contrast, the following of sport via radio and television appears to be dwindling. It may be that more people now follow sport via the Internet; on the other hand, it is also possible that people are experiencing a degree of 'sport fatigue'. The enormous number of sports programmes broadcast has made following matches on the television less of a special event. Whether this reduced interest in following sport on radio and television marks the start of a new trend or is merely a temporary dip is a question that will have to be answered in the coming years.

6 Sports infrastructure

Although participation in sport is still growing, the number of sports facilities is failing to keep pace or is even falling back in relative terms. The main areas of growth are in the number of Cruijff Courts (playing fields established in disadvantaged neighbourhoods, sponsored by the Johan Cruijff Foundation; several of these have been established in the Netherlands, and recently a Cruijff Court was opened in Islington, London) and Krajicek playgrounds (a similar project involving the creation of sports fields and playgrounds for young people in disadvantaged areas, sponsored by the Richard Krajicek Foundation), and commercial sports organisations (riding schools, sports academies, fitness centres). The trend away from local authority-run towards privately operated sports facilities came to a halt or even reversed slightly between 2003 and 2006.

The top 15 NOC*NSF sports associations have remained fairly stable for several years. One change that has however taken place is that, after the Dutch Football Association (KNVB) and the Dutch Lawn Tennis Association (KNLTB), in first and second place, respectively, the Dutch Golf Federation (NGF) is now in third place, having displaced the Royal Dutch Gymnastics Federation (KNGU). Among the sports that have seen strong growth in memberships in recent years are athletics, hockey and equestrian sports. Almost 27,000 sports clubs were affiliated to the sports federations in 2007 (a reduction of 1% compared with 2004). The average number of

members rose during that period from 174 to 190 per club. 9% of sports clubs had 500 members or more in 2006; one in three sports clubs had fewer than 50 members.

Roughly 1.5 million people perform voluntary work within sport. This figure is fairly stable, though the most recent measurements suggest a slight decline in the number of volunteers in the population at large. Sport volunteers are more often men than women, and more often young than old. They are also generally better educated, come from the higher income groups and are indigenous Dutch. Volunteers are active at 84% of sports clubs. The total amount of unpaid work carried out in the sports sector is equivalent to 52,000 FTE.

7 Economics of sport

Consumer spending on sport fell from € 3.7 billion in 2003 to € 3.5 billion in 2006. Government spending on sport increased over the same period by 14%, to over € 1 billion. As in earlier years, spending allocated to sports clubs increased slightly more quickly than spending on sports halls and facilities. Further funding came from lotteries, which in 2006 generated more than € 44 million for sport.

The combined revenues of sports clubs (excluding water sports clubs and professional football) increased to € 1.1 billion between 2003 and 2006 (+16%). More than half the income and expenditure was attributable to clubs in just three branches of sport: amateur football, tennis and golf. Subsidies and government grants constituted 11% of the income of sports clubs in 2006. Without this income, the clubs would have operated at a deficit of € 80 million, as they did in 2003. The combined turnover of all sports organisations together (including commercial sports organisations and professional football) totalled € 2.9 billion in 2006 (2003: € 2.3 billion). This figure includes turnover in the fitness segment (€ 840 million in 2007, € 630 million in 2003).

Commercial and non-commercial sports organisations (excluding fitness centres) employed a total of 22,000 people in 2006 (an increase of 1,000 compared with 2003). The volume of labour increased by 9% over the same period to just under 9,000 full-time equivalents. The volume of labour of staff not on the payroll (e.g. owners/managing directors, temporary agency staff) grew by 23% over the same period, to 4,500 full-time equivalents. Together with the volume of labour of staff on the payroll and employment at fitness centres (11,600 FTE, see chapter 14), this implies that 25,100 FTE were employed at sports organisations in 2006. To this can be added the staff at facilities such as swimming pools and yachting marinas: 8,720 FTE for staff on the payroll (a reduction of 8% compared with 2003) and 1,850 FTE for non-payroll staff (-3%).

8 Sport, space and time

The total area available for sport in the Netherlands increased slightly between 1996 and 2003, from 31,000 to 32,000 ha. Open-air sports facilities occupy less than 1% of the total area of the Netherlands. The trend towards moving open air sports facilities out of central urban areas to peripheral municipalities, which has been under way for some time, has continued in recent years. Residents of these peripheral municipalities relatively frequently practise sport in a green environment. Land prices near to sports fields are relatively high, possibly suggesting that the presence of sports fields has a positive influence on land values.

More than one in ten leisure journeys can be traced to sporting activities. A large majority of all sports-related journeys (60%) are however shorter than 5 km. Even more striking is the (continuing) domination of the car in sport-related journeys, even over short distances.

Sport remains an activity predominantly for the evenings and weekends: 69% of participation in sport takes place at these times, and when it comes to attending matches the figure is even higher, at 94%. The routine of the working day means that sport and associational life only really get going after 5.00 p.m. This offers opportunities for utilising empty sports facilities during work and school hours, but also implies that paid staff would have to be recruited for all manner of tasks, since at these times volunteers are engaged in other activities.

9 Sport, exercise and health

Adult exercise patterns are improving in the Netherlands; the proportion of Dutch people who are inactive has fallen from 9% to 5% in recent years. The proportion of Dutch people who exercise in accordance with the 'combinorm' – the norm amount of exercise that is required to maintain good health – increased from 52% in 2002 to almost 66% in 2006/07. However, detailed figures on the exercise patterns of the adult population do not yet confirm this positive trend. Those who participate in sport score better across the board than those who do not. A further point for attention is that the percentage of people achieving the fitness exercise norm appears to be falling slightly. The percentage of people who meet the norm is considerably lower among 12-17 year-olds than among adults. The percentage of young people meeting the exercise norm of 60 minutes is 38%.

On average, there are at least 1.5 million sports-related injuries in the Netherlands each year. Half of these require medical treatment. The possibility cannot however be ruled out that the actual number of injuries is even higher.

There is growing evidence that physically demanding forms of exercise, such as sport, have a greater (positive) effect on health than less intensive forms of physical activity. This means that there is a need when encouraging exercise to stress that in order to achieve the maximum effect, it is important to participate in more intensive forms of physical activity, such as sport.

10 Sport and education

Primary school pupils receive an average of 90 minutes physical exercise instruction each week, while in secondary schools between 2 and 2.5 hours per week are devoted to this. Around half of all primary schools employ a specialist physical education teacher. They work mainly with the more senior years and are found mainly at larger schools and at primary schools in the *Randstad* conurbation (the densely populated region in the west of the Netherlands incorporating the four largest cities Amsterdam, Rotterdam, The Hague and Utrecht). Physical education is not regarded a priority in senior secondary vocational education.

The position as regards the ability of Dutch children to swim is not bad; 55% of all 6-7 year-olds and 96% of 11-15 year-olds have attained at least one swimming certificate. Compared with 2003, there has been no change in the overall attainment of swimming diplomas among all children aged between 6 and 15 years, though there has been an increase in the number of children holding the more advanced C-diploma.

There has been a marked increase in the interest in sports education courses in recent years. A number of new courses have been introduced and the number of students is growing, both at senior secondary vocational level and at higher professional and university level. There are some concerns about the labour market position of those graduating from senior secondary vocational sports training courses; however, many of these students go on to further education or branch out to sectors other than the sport sector. One negative aspect is the often limited opportunity for full-time employment for graduates in sports disciplines. Pooling hours between schools and expanding the range of tasks to create combination posts could offer a solution here.

11 Elite sports

The investments in elite sport have increased since 2000. This has helped enable more elite sportsmen and women to practise their sport full-time, and has allowed sports federations to employ more top-class coaches and offer them better terms of employment. A majority of elite sports practitioners are themselves of the opinion that this policy has led to further improvements in the climate surrounding elite sport in recent years. There are however still problems. For example, older elite sports practitioners, in particular, face financial problems precisely because they have begun practising sport full-time. In the longer term it is likely that the improvement in the climate in elite sport will lead to more success. The ambition of being among the top 10 countries in the world has not yet been achieved, but the Netherlands is close to doing so.

Developments in recent years show that it is difficult to continue improving the level of performance relative to other countries. The competition also pushes up investments. In the light of the ambition of the sports organisations and the Dutch

government to put the Netherlands in the world top 10, these international developments put pressure on the Netherlands to increase the spending on elite sport and to further improve the efficiency and effectiveness of those investments. A related question here is whether the Netherlands should focus on diversity or on specific priorities. It would seem that more money is spent on diversity in the Netherlands than in other countries, though it remains the case that 91% of all Dutch Olympic medals between 1948 and 2008 have been achieved in just nine branches of sport.

12 *Medical costs of insufficient exercise*

A lifestyle which contains insufficient physical activity has an impact on health care costs. Although the percentage of people meeting the combinorm for exercise rose between 2004 and 2007, the health-related costs attributable to sub-norm activity levels rose over the same period from € 744 million to € 907 million. A key explanation for this increase are the increased fees in the health care sector. The annual medical costs directly attributable to sports injuries in the Netherlands are estimated at € 230 million. The biggest cost item, € 70 million, is accounted for by physiotherapists.

If the costs of health care caused by sub-norm physical activity (€ 907 million) are set against the cost savings due to absence of sports injuries (€ 230 million), this results in a total of € 677 million per year. Investing in exercise policy thus not only involves costs, but also generates significant revenues.

13 *Collaboration between schools and sport*

There is wide public interest in projects at the interface of education and sport. National incentives and projects ('Young people on the move' (Jeugd in beweging), BSI (Sport for All), BOS (Neighbourhood, Education, Sport)) have facilitated this collaboration. The socialisation of education and sport also plays an important role here, however; schools today are much more emphatically rooted in the local community, in everyday life. In this sense, the collaboration between schools and sport can be described as positive.

However, the effect of school and sports projects on the exercise patterns of young people as a whole is minimal. The collaboration between education and sport enables young people to become acquainted with various branches of sport, but the limited scope of this collaboration and its ad hoc character means it makes virtually no contribution to the creation of new, supplementary sports opportunities for those who are currently inactive, nor to extra opportunities for those pupils already participating in sport. Moreover, the collaborating partners (e.g. schools and sports clubs) do not themselves always see the benefits of the collaboration, or they perceive too many barriers to engaging in it (no time, no volunteers, etc.). It remains to be seen to what extent the collaboration between schools and sport will have a positive impact over the long term, and to what extent it encourages sport among the young.

14 *The fitness industry in the Netherlands*

The Dutch fitness sector is developing rapidly to a fully fledged service industry in the fields of sport, exercise and health. More than two million Dutch people practise sport at one of the 2,000 fitness centres throughout the country. Together, these centres generate turnover of around € 840 million per year and provide employment for 26,000 people, or 11,600 FTE.

Fitness companies are increasingly being acknowledged by health insurers and central government as partners in the policy for (preventive) healthcare and encouraging sport. The growing interest in health, both among the population and from the perspective of policy and related sectors (wellness, hospitality industry, leisure) is likely to generate further growth in the sector. However, the competition in the fitness market, too, appears to be increasing. It remains to be seen whether the market will become saturated in the near future and turn into a strong displacement market. What is in any event likely is that the desire to participate actively in sport will grow further, even in an ageing population.

15 *Epilogue*

Sport is showing more and more signs of being a genuine, mature sector of industry. The developments taking place in sport are illustrative of the changes in the leisure industry as a whole. Generous sponsors, entrepreneurial providers of sports amenities, health-conscious sports consumers and expansionist media have all helped sport to raise its game to a new level. Politicians and policymakers sing the praises of sport as a means of contributing to improved public health and social cohesion. If it is assumed that these trends will continue in the coming years, then the future for sport seems to be a very healthy one. The main threat appears to stem from the recent financial crisis, with the concomitant uncertainty as to how much this will affect the economy in the next few years. On another note, the recent increases in participation in sport suggest that there may be a good deal of as yet undiscovered potential. The prospect of one day bringing the Olympic Games back to the Netherlands is a powerful stimulus for asking that attention (and money) be ploughed into investments in sport across the full spectrum. At the same time, the challenge facing sport is to channel the processes of commercialisation and professionalisation smoothly and successfully. There is no doubting the fact that sports federations, associations and clubs will play a key role in the sports landscape of the future. Precisely what that role will be and who will fulfil which key tasks in it, is by contrast still open for debate.