# Summary and conclusions Report on Sport 2014

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The *Report on Sport* (*Rapportage sport*) is regarded by the Dutch sports sector as the primary reference work in the field. The first edition was published in 2003 at the request of the Sport Department of the Ministry of Health, Welfare and Sport. The purpose of the *Report on Sport* is to bring together and describe the available statistics on sport in the Netherlands, and to draw conclusions from this regarding the way in which sport is developing. The notion of 'sport' is defined broadly in this report: it not only includes active participation in sport, but also following sport via the media or attendance at events, etc., the sports infrastructure (organisations and facilities), the sports economy (spending levels, income and expenditure of organisations, employment) and developments in sports policy, including elite sport. Where possible, we place the outcomes in the context of developments in society. The report is edited by the Netherlands Institute for Social Research | s CP with collaboration from several research institutes.

This summary starts by presenting the main findings, summarised in a list of key indicators. The list is based on an scp report on strengthening the sports data infrastructure (*Versterking Data-infrastructuur sport*) and has been fleshed out further by the Ministry of Health, Welfare and Sport in collaboration with sports research institutes. This is followed by a discussion of social and policy developments and other key results from other chapters in this report.<sup>2</sup> Where applicable, there is a broader discussion of developments in the sports landscape.

### S.1 Key indicators for sport: stable to slight increase

The key indicators present a broad picture of developments in sport in the Netherlands (table S.1). Most of the indicators show a stable or improving – although often to a very limited extent – picture over the last decade. Multi-year statistics show a slight increase in the proportion of Dutch people taking part in sport, but not enough to achieve the sports sector's ambition of 10% growth (see note a, table S.1). The share of the Dutch population who are members of the sports club, volunteer each month or attend matches or events is neither increasing nor decreasing. The social engagement with sport by the Dutch is thus fairly stable. The majority of Dutch people are satisfied with the sports and exercise facilities on offer locally. Almost three-quarters of those who regularly participate in sport or attend events feel safe at sport matches, but nearly four in ten have experienced or witnessed antisocial behaviour. No trends can be identified regarding these figures; future measurements will provide more clarity here. The same applies for the data on physical education.

Looking at sport from the perspective of its health benefits, we observe both a positive and a negative development: slightly more Dutch people are taking exercise and meet the exercise norms<sup>3</sup> (see note b, table S.1), but the number of injuries per 1,000 hours spent on sport has increased.

Overall, the achievements of Olympic and Paralympic sportsmen and women show a mixed picture, with no clear increase in the international medal rankings over the last ten years.

The recent economic crisis has thus far not had a negative impact on the sports economy. Between 2006 and 2010, the share taken by sport in the total economy remained stable at around 1%. Employment in the sports economy (the sports sector itself, but also related sectors such as merchandising, hospitality, public sector or education) amounted to 110,000 full-time jobs in 2010 (1.6% of total employment in the Netherlands), an increase of 10,000 compared with 2006.

Conclusion: developments in sport based on these key indicators show a stable or slightly increasing picture over the last decade. Could more have been expected from the available budgets? Would the outcome have been the same without specific policy? Merely answering 'yes' or 'no' to these questions is too simplistic.

First, it is uncertain whether this stability has occurred despite or because of the policy on and investments in sports facilities, promoting sport and elite sport. It may be that these would have declined if nothing had been done. Which of the two options is correct is not easy to determine. Evaluation of the policy measures would require separate research that goes beyond this study. What is certain is that policy is not the only determining factor; economic and social developments also play a role in sport. And when it comes to elite sport, international changes also influence Dutch achievements. The influence of policy on developments should therefore not be overstated. Second, the key indicators present an average picture for the whole population, across all regions and all branches of sport in the Netherlands. More detailed analysis of the key factors, for example by education level, municipalities that invest a lot in sport versus municipalities that do not, or by different branches of sport, produces a more differentiated picture. Analysis of involvement in sport in different population groups shows that there is still wide variation, which increases or decreases over time. In this report, differences between municipalities or branches of sport are largely left out of consideration. This is mainly for methodological reasons: much of the data available to date does not permit statements at that level of detail. Some changes are however taking place in this regard,<sup>4</sup> which is promising for future reports. A number of key indicators will need to be developed further in the years ahead, either in the sense of defining more precisely how they should be interpreted, or in terms of calculating their value.

Table S.1

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Key indicators for sport

key indicator	definition	most recent outcome	trend over last ten years
Participation in the Netherlands			
sports participation	share of population regularly taking part in sport		
	sport 12x per year or more (6-79 yrs)	75% <sup>b</sup>	slight increase
	weekly sports participation (12-79 yrs)	56%	slight increase
sports participation	share of people with a disability/chronic illness regularly participating in		
disabled persons	sport		
	sport 12x per year or more (6-79 yrs)	64%	I
	weekly sports participation (12-79 yrs)	34%	slight increase
club membership	share of population who are members of a sports club (6-79 yrs)	33%	stable
volunteering	share of population who volunteer monthly for sport (12-79 yrs)	11%	stable
norms and values/safe	share of monthly participants/spectators who feel safe in and around	73%	I
sports climate	matches/events (12-79 yrs)		
	share of monthly participants/spectators who have experienced or	38%	I
	witnessed misbehaviour in sport in the last 12 months (12-79 yrs)		
physical education	total number of minutes actually devoted to physical education in pri-	yr 1-2 primary: 144 min	I
	mary and secondary school	yr 3-8 primary: 87 min	
		yr 1 secondary: 150 min	
		yr 4 secondary: 97 min	
doping recreational sport	prevalence of doping in recreational sport	I	I
VITAL NETHERIANDS			
exercise <sup>b</sup>	share of population taking sufficient exercise according to combinorm	65%	slight increase
	(≥12 yrs)		
	share of population taking sufficient exercise according to exercise norm	63%	slight increase
	(212 yrs)		
incidence of injuries	number of injuries per 1000 hours of sport (≥4 yrs)	2.0	increase

Table S.1 (continued)		-	
key indicator	definition	most recent outcome	trend over last ten years
sedentary behaviour	number of hours spent sitting/lying by 12-64 year-olds on a school/wor- king day (excl. sleep)	7.4 hours	T
Talent in the Netherlands			
top-10 ambition	position of Netherlands in international medal rankings, Olympic sports	6	stable
top-10 ambition disabled	position of Netherlands in international medal rankings, Paralympic	16	stable
sport	sports		
talent development	position of Netherlands in international medal rankings in European and world youth championships	I	I
Map of the Netherlands			
subjective assessment of	share of population satisfied with sports and exercise facilities (12-79 yrs)	87%	1
sport and exercise facilities			
level of amenities	density of sports facilities per 10,000 inhabitants	I	I
	total area occupied by sports facilities	34,474 hectares	slight increase
exercise-friendly environ-	1	I	I
ment			
Focus on the Netherlands			
sports fan	share of population following sport weekly via media (12-79 yrs)	62%	I
	share of population attending matches/events monthly (12-79 yrs)	23%	stable
GDP from sport	GDP from sport as share of total GDP	1%	stable
employment in sport	absolute employment volume in sport	110,000 FTE	increase
a. According to the Leisure T	ime Omnibus (v τo) study, 75% of the Dutch population take part in sport	12 times or more per year.	Purely on the basis of this
percentage, it may be though the vito study was carried	ught that the amplition of the sports sector ( from 95% to 75%) has been ( out for the first time in 2012 and resulted in a high sports participation fig	achieved. However, this col gure compared with other s	nclusion is not jusuited: studies. There are several
methodological explanati	ons for this (see Van den Dool et al. 2014). The outcomes can therefore no servise norm are guidelines for adeguate exervise. To meet the exervise n	ot be readily compared with	i other studies. Moderately intensive activity
for at least 30 minutes per	day on five days per week. The combinorm also includes intensive exerci	se.	
<ul> <li>– = no data yet available/furti</li> </ul>	her analysis needed		

#### 5.2 Social and policy developments in relation to sport

Social developments in recent years have been both favourable and less favourable for sport. Population ageing and the related increase in impairments and chronic illnesses have a less positive impact on sport – although the sports participation among the older population, even those with chronic illnesses, has increased in recent years. The Dutch attach great value to good health, but developments in a number of lifestyle factors – with the exception of smoking – still show no improvement. Almost half of Dutch adults, and one in seven young people, are overweight. On the other hand, these figures have not increased in recent years, which might be viewed as a positive development. The growth in the share of non-Western migrants could imply a positive development because of the increased number of second or third-generation migrants, in particular, who are more familiar with the Dutch sports culture than the first generation. Another positive development is the continuing rise in average education level: better educated people more often take part in sport. The present generation of over-65s, in particular – whose participation in sport relatively low – are largely lower-educated; this situation will change in the future due to cohort replacement.

For most people, sport is a form of leisure activity. Although the Dutch have acquired more leisure time in recent years, they have devoted most of that time to media (Tv, computer), with just a slight increase in the amount of time spent on sport. Contributions or entrance fees during a period of economic crisis may have dampened the growth in sports participation and attendance. This could be particularly relevant for households living in poverty, and their number has increased in recent years. Children who grow up in poverty are at greater risk of social deprivation (including in later life), which also means that they participate less in sporting activities.

The years 2008-2014 marked a turbulent period for sports policy in the Netherlands. It received a strong boost from the Olympic Plan 2028 and the related government standpoint, both dating from 2009, but released in 2012. An example is the policy document on Sport and Exercise in an Olympic Perspective (*Sport en Bewegen in Olympisch Perspectief*), which was published by the Ministry of Health, Welfare and Sport in 2011. The policy document identified three priorities:

- Sport and exercise in the neighbourhood, focusing on demand-led and appropriate sports and exercise facilities at neighbourhood level. Promoting public-private partnership as well as linking sport, care, education and work by deploying 'combination officers' and neighbourhood sports coaches. Extra attention for participation in sport by people with a disability.
- Working on a safer sports climate, with attention for sportsmanship and respect in sports clubs.
- Excelling in sport, with support for the top-10 ambition of the National Olympic Committee \* Netherlands Sports Federation (NOC\*NSF) and sports federations, and a focus on realising social and economic spin-offs from events.

Sport is widely visible in the media, but by no means always in a positive light (e.g. match-fixing, doping, violence in and around venues). To date, the (national) sports policy has been exempt from spending cuts, as the government continues to invest in both recreational and top-level sport. Local spending cuts pose a risk to this policy, and are expected to impact on local authority sports budgets in 2015. A further risk is the potential loss of funding from gambling, such as the national lottery (Lotto).

## S.3 Taking part in the Netherlands – playing sport and being active

Participation in sport has risen slightly in recent years. Three-quarters of the Dutch population (75%) take part in sport at least 12 times per year, and more than half (56%) participate once a week or more. Based on these figures, it might be concluded that the ambition of the sports sector (an increase from 65% to 75%) has been achieved. However, such a conclusion is premature: the Leisure Time Omnibus (VTO) study was carried out for the first time in 2012 and resulted in a high sports participation figure compared with other studies. There are several methodological explanations for this (see Van den Dool et al. 2014). Other studies show a very limited increase.

Regular participation in sport is high in the Netherlands compared with other European countries. Even so, a quarter of the population (25%) never or rarely play sport and almost one in five (19%) do participate, but not every week. Differences in sports participation by sociodemographic background characteristics are stubborn. Age, education level and health remain important indicators for participation. The differences in participation between young and old have narrowed since 2001, but have widened slightly between those with low and higher education levels. People with a moderate or severe physical disability have increased their weekly sports participation in recent years, though their participation is still much lower than that of people without a disability (64% participate 12 times or more per year, 34% do so weekly).

Environmental characteristics are also related to sport and exercise. Residents of relatively disadvantaged neighbourhoods play sport and take exercise less and are less often members of a sports club than those living in good or very good neighbourhoods. Reasons for this may lie in neighbourhood characteristics, such as fewer amenities or accessibility of sports facilities, but also in personal characteristics, such as feeling less safe in the neighbourhood, less mobility, or unfamiliarity or not feeling at home in the modern-day sports culture. How these factors relate to each other and to what extent they can explain differences in sports participation is insufficiently clear and will be the subject of research in the coming years.<sup>5</sup>

The slight increase in sports participation is not reflected in growth in participation through clubs (33% of the Dutch are members of a sports club). Almost half those who participate in sport are members of a sports club or other (often commercial) organisation. People often choose to participate in sport alone or to organise their own small group, a trend that is also visible in other sectors of society. This can have consequences for the need for sports venues (see § S.5) and the number of sports clubs. Many members are active as volunteers: in 2012, 11% of the population worked as volunteers in sport at

least once a month. They are very important for sports clubs: 82% of clubs use volunteers (2000: 86%), who together account for 56,000 unpaid full-time jobs.

The deployment of combination officers (2008-2010) and neighbourhood sports coaches (2011 and beyond) is intended to create a link between sport and education, care or welfare (see chapters 3 and 11). The intention is that they should make it easier for these sectors to collaborate and to encourage different groups (young people, older people, disabled people, non-Western migrants) to take part in sport. Local authorities can use co-funding to deploy neighbourhood sports coaches, and have already made wide use of this facility (94%). Organised sport supports this policy by promoting an open and neighbourhood-focused policy by sports providers.

In (physical) education, the government is using neighbourhood sports coaches and other policy incentives in a bid to stimulate cooperation with the sports sector as a means of reinforcing its policy on health care, education, sport and welfare. The attention for sport and exercise fits with the broadening of the tasks of schools and sports organisations. Evaluations have shown that creating combination posts at school can boost quality by expanding the availability and involvement of combination officers. The collaboration between sport and education is however growing only very gradually. The Sport, Exercise and Education policy framework which ran from 2009 to 2012 produced results, but the ambitions in respect of taking exercise, reducing school dropout and promoting talent proved not to be attainable within three years. The subsequent Sport, Exercise and Healthy Lifestyle education agenda is attempting to embed these aspects in a broader policy approach in schools. Although schools are showing lots of interest in this initiative, it remains to be seen whether short-term measures can be expected to produce lasting developments in local education and sports practice. One in five Dutch primary schools give children only one hour physical education per week, and in senior secondary vocational education only a quarter of students in vocational training meet the norm for school time devoted to sport and exercise. Stricter criteria have been applied since 2006 for teaching physical education at primary school, but this has not led to the deployment of more specialist teachers.

Seven out of ten sports participants or spectators (73%) feel safe in and around sports matches. However, just under four out of ten (38%) have experienced or witnessed misconduct. This occurs in all age groups and all sports, but is relatively frequent in team sports. Excesses appear to be a particular problem for soccer. Vulnerable subgroups such as non-Western migrants, lesbian, gay, bisexual and transgender (LGBT) and disabled participants, as well as participants in top-level sport, report significantly more experiences with unacceptable behaviour.

A growing number of sports federations and clubs are devoting attention to sportsmanship and respect, preventing antisocial behaviour and encouraging good behaviour. However, the policy and other instruments developed do not adequately reach sports clubs, and their implementation warrants extra attention. Administrators, trainers/ coaches, referees, parents and participants are all essential in creating a respectful climate within a sports club.

#### S.4 Vital Netherlands – health and exercise

Two-thirds of the Dutch take sufficient exercise according to the combinorm (65%) or the exercise norm (63%).<sup>6</sup> The number has risen very slightly in recent years. Those who participate in sport more often meet the exercise norms than those who do not participate. Sport acts as an 'extra' source of physical exercise, as well as a source of intensive exercise, which has great health benefits. Compared with other Europeans, the Dutch take a lot of exercise, but are also champions when it comes to sitting: Dutch people aged between 12 and 64 years spend an average of 7.4 hours sitting down on each school or working day. Sports participants, with the exception of 30-64 year-olds, are found to spend just as much time sitting down as non-participants, and therefore needlessly run health risks. This means that sports participants are just as important a target group for policy to combat sedentary behaviour as non-participants.

The number of sports injuries per 1,000 hours of sport has risen to an average of two. Fitness training and running have caused far more injuries in recent years, and these sports figure largely in the increased incidence statistics. The risks of promoting sport manifest themselves in this way as more people start playing sport, not always under expert supervision (e.g. budget gyms or individuals who begin running), so that the risk of injuries and possibly giving up sport as a result is a very real one. The prevalence and the medical and social costs of sports injuries call for continuation of preventive policy; training in how to fall safely, protective equipment (shin guards, braces and gum shields) can play a role here. The savings on health care and sickness absenteeism costs as a result of promoting exercise are however still substantially greater than the costs of sports injuries.

Sports policy has broadened its focus in recent years, and now embraces exercise as well as sport. This can be justified based on the health benefits of sport and exercise, something to which the Dutch attach great importance. This broadening of policy does beg the question of whether a more integrated approach should not be adopted to exercise and the sedentary behaviour of the Dutch. Exercising in leisure time (cycling, walking, sport, DIY, gardening) accounts for only a part of the daily exercise pattern. It is also important to devote attention to physical activity at work or school. Both extremes – work that is physically too demanding versus sitting too much and for too long – are risks that are insufficiently covered by the sports and exercise policy in its present form.

#### S.5 Talent in the Netherlands – top-level sporting achievements

The Dutch elite sports sector has set itself the target of being among the top 10 best countries in the world, for both Olympic and Paralympic sports. Based on the medals gained at World Championships, Olympic and Paralympic Games, the Netherlands took ninth place in early 2014 in Olympic sports and 16th place for Paralympic sports. The trend has fluctuated over recent years, but does not show a clear improvement. Since the 1990s, Dutch policy on top-level sport has focused primarily on improving the collective conditions. Many top sportsmen and women have benefited from this and perform

better against other countries than might be expected based on the gross national product and size of the Dutch population – important explanatory variables for success in elite sport.

International research shows that Dutch policy on elite sport scores well in areas where long-term planning and coordination are important: sports participation, organisation and structure, recognition and development of talent, supporting former and current elite sportsmen and women and coaches. The small size and population of the Netherlands makes the organisation and structuring of elite sport and the recognition and development of talent easier. Measures taken allow more elite sportsmen and women to participate in their sport full-time, and allows more coaches to be employed full-time. In areas which require more financial resources, such as international competitions, scientific research and – to a lesser extent – training facilities, the Netherlands achieves an average score. There is (as yet) no overarching control of applied research in elite sport, and top-level sportsmen and women would like to have access to training facilities at any time of day. As regards funding, the liberalisation of the gambling market poses a particular threat to elite sport. The national lottery (Lotto) provides more than a quarter of the collective funding for elite sport.

Whether the policy recently introduced by NOC\*NSF of focusing on a limited number of sports will push the Netherlands up the medal rankings remains to be seen. Dutch policy on elite sport already uses the available resources extremely efficiently. Moreover, the achievements of countries which have a longer track record with such a focused policy do not suggest that this leads to greater success. The scarcity of resources and increased competition do however force prioritisation. Time will tell whether the top-10 ambition can be realised despite or because of these choices.

#### S.6 Map of the Netherlands – sports infrastructure

87% of the Dutch are satisfied or very satisfied with the range of sports, venues and exercise facilities available in their neighbourhood. The Dutch are also very satisfied with these aspects compared with other Europeans. Most Dutch people (77%) say they see no obstacles in their local setting that impede them in taking part in sport or exercise. Yet not everyone takes part in sport and not everyone takes enough exercise. Although the government believes that people should make their own choices and take their own responsibility, it does attempt through its policy to persuade people to play more sport and take more exercise. Citizens see a role for local government here: a majority think that local authorities are key in maintaining sports amenities, though they would like to see the government continuing to provide financial support for activities to encourage participation in sport. How does this compare with other local amenities? Swimming pools score highly among amenities supported by the local authority. However, if we include non-publicly funded amenities in the comparison, local amenities such as shops or doctors' surgeries are more important for people's immediate residential setting than sports facilities. A degree of perspective is therefore called for here. Half the population play sport in official venues such as sports halls, sportsfields, fitness centres or swimming pools. At the same time, four out of ten (also) use public spaces. This applies especially for adults and older persons, who more often use the public road for sporting activity. Residents of urban areas make more use of commercial facilities and swimming pools, which are more common and closer to home. In very highly urbanised areas, people travel 1.7 kilometres to a swimming pool, whereas residents of non-urban areas have to travel 3.7 kilometres. The distance to a limited choice of sports facilities partly explains why residents of non-urban areas make more use of sportsfields, though this also suggests that people are choosing from what is available locally. On the other hand, people do not always go to the nearest venue to participate in their branch of sport; the distance they actually travel is generally greater than the distance to the nearest facility.

The available sports infrastructure (space, venues, sports organisations) has both grown and contracted since 2000. The number of hectares devoted to sports fields increased by 8% until 2010 to 34,500 ha. This was greater than the growth in the Dutch population over the same period, which means that there are now 2.1 ha of sport fields per 1,000 inhabitants. This growth took place mainly outside the urban setting; in town centres and suburbs, the number of hectares of sportsfields remained unchanged or fell slightly. This corresponds with fluctuations in the local population. The growth in the amount of land devoted to sport and in the population does not run parallel everywhere: in the Province of Limburg, for example, the population has shrunk whereas the number of hectares devoted to sport has increased by 10%.

Compared with 2000, there are also more commercial sports organisations such as fitness centres, riding stables, sports schools and instructors, sailing and surfing schools. The number of sports clubs is declining, whereas the total number of members has grown. This means that trend towards larger sports clubs has continued: 9% of clubs had 500 or more members in 2012; one in three have fewer than 50 members.

The total number of venues provided by local authorities and commercial operators has declined since 2000; there were fewer swimming pools (-8%) and open-air sports facilities (-7%) in 2012, but more indoor sports venues (+2%). There is a trend towards greater multifunctionality and clustering of sports facilities. The former trend is particularly evident for indoor facilities, with more spaces being configured for multifunctionality at the expense of areas dedicated to specific sports. Clustering leads to fewer open-air facilities, but this has no consequences for the number of sportsfields and courts, which has increased. Local authorities are increasingly outsourcing the management and operation of sports facilities to foundations or private-sector organisations. Swimming pools (until 2009) and open-air sports facilities, which are generally still managed by the local authority.

The number of swimming pools has fallen markedly, and fewer Dutch people swim weekly. This appears to be a chicken and egg situation: did the number of swimming pools decline first or did it begin with fewer swimmers? What is certain is that a swimming pool is a major cost item in a local authority sports budget, which means that closing a swimming pool is a real consideration during times of austerity. The public do not always welcome such decisions; more and more swimming pools are being managed by 'neighbourhood enterprises': a group of residents who operate the swimming pool themselves. The government would like to see civic initiatives such as this in many more areas (e.g. care), but it is questionable whether it is realistic to expect this from all citizens. Not everyone will be able to provide the knowledge, time, effort and skills needed for this.

# S.7 Focus on the Netherlands – attendance at matches, media and economic profit

23% of the Dutch population attend a match or event once a month or more. This can vary from attending the hockey world championships in The Hague in 2014 to the local children's kickabout. Young people, men and people with a higher education level attend more often than others. Amateur or professional football matches are the most popular. Professional football draws more than seven million spectators annually. The government and the sports sector hope to achieve several economic and social goals by organising larger and smaller sports events. However, it may be that these expectations are set too high. The economic impact of a sports event is mainly regional and short-lived. How great the impact is depends on the type of event, e.g. its scale, length and the type of sport(s). The social goals include increasing sports participation and social cohesion, with the hope being to create a win-win situation. Whether these goals are achieved has been insufficiently researched. There is considerable support and appreciation among the local population for the organisation of appealing sporting events, though this does vary depending on the type of event and the region where it takes place. However, attending an event mainly inspires more participation in sport by those who are already active; hardly any non-participants are persuaded to take up sport after attending a match or event. 19% of the Dutch population occasionally take part in a sporting event. Running and cycling, in particular, appear to be gaining in popularity.

The media attracts many people who are interested in sport. A large majority of the population (62%) follow sport via various media at least weekly. Tv is especially popular, though people make just as much use of printed media and the Internet to inform themselves about sport on a daily basis. People who participate or attend matches are more likely to follow sport via the media. However, participating and watching sport do not always go hand in hand; the over-50s and lower-educated people frequently follow sport via the media, but relatively infrequently participate in sport. Major international sporting events (Olympic Games, football championships) continue to draw Tv viewers. The Paralympic Games attract less interest from Tv broadcasters and viewers and from online news sites and social media than the Olympic Games.

The Internet has within a short space of time acquired a permanent place alongside other media as a means of following sport. A third of the population sometimes visit sports websites, and young people in particular exchange sporting experiences via social media. Social media, following sporting achievements in real time and monitoring one's own sporting and exercise patterns are leading to the interweaving of passive and active sports participation.

Macroeconomically, sport contributes 1% to the total Dutch economy. Much of the 'production' of sport takes place outside the sports sector itself, for example in the form of physical education in schools, spending on food, drink and accommodation in relation to sports participation or attendance, and the purchase of sports clothing and articles. The sports economy as a whole employs 150,000 people (1.7% of the total Dutch economy) in 110,000 full-time jobs (1.6% of the total economy). These are still relatively often part-time jobs, though the number of jobs in the sports sector has however grown in recent years, as has the number of training courses for jobs in this sector. Interest in a job in sport or a related sector is evident at secondary schools from the fact that more students are taking examinations in subjects related to physical education and sport. The main consumers of sport in the Netherlands are households and the government. Households spent almost 500 euros on sport in 2010, 1.6% of their total expenditure. This amount was higher between 2007 and 2009. The government spent just over 1.2 billion euros on sport in 2012, the lion's share of which was spent on the (private or public) operation of sports facilities in municipalities. This amount has remained stable since 2010.

The government contribution is important for private-sector operators of swimming pools and for sports clubs. Subsidies and other donations account for 36% and 9%, respectively, of their total income. Without a government contribution they would be unable to balance their budgets. This argument does not apply for other indoor or outdoor sports facilities, where subsidies account for only 4% of total income. It should be noted that this does not take into account the difference between the cost price of the venue and the hire fees charged to users; this could change following the introduction of the Market and Government Act (Wet Markt en Overheid). If this difference is included in the calculation, it is likely that the operating deficit of private-sector operators and sports clubs will increase. Based on the new coalition agreements, it is moreover likely that spending cuts will impact on local authority sports budgets in 2015. This will particularly affect sports clubs, as local authorities expect them to become more 'self-sufficient'. Most of the variables in the sports economy, such as government spending on sport, the costs and benefits of private-sector sports facilities and sports clubs, and employment in sport, increased between 2000 and 2009. After 2009 they remained stable or fell, as in the case of employment. The economic downturn thus appears to have had an impact on sport, though thus far sport does not appear to have been hit harder than other sectors or to be lagging behind the general economic trend.

#### Notes

- 1 With thanks to the other authors of the *Report on Sport* for their critical contribution to earlier versions of this summary.
- 2 The order and classification of the key indicators is also maintained in this summary. The chapters in the report follow a different sequence, following that used in earlier *Reports on Sport*.

- 3 Other research does not confirm this slight increase. This may be due to differences in the measurement method and question formulation.
- 4 The data from the Health Monitor (Statistics Netherlands (CBS), Municipal Health Services (GGD-NL) and the National Institute for Public Health and the Environment (RIVM)), the Sports Facilities Monitor (Mulier Institute) and the Knowledge Information System (KISS) produced by NOC\*NSF will create opportunities in this regard in the future.
- 5 Research is being carried out on this as part of the Netherlands Organisation for Scientific Research's Sport programme, and SCP and RIVM are also carrying out research to explain participation in sport and exercise.
- 6 The combinorm and the exercise norm are guidelines for sufficient physical exercise. To meet the exercise norm, adults must engage in moderately intensive activity for at least 30 minutes on five days per week. The combinorm also includes intensive activity.