



PwC Global Sports Survey

Exploring the sports sector
in The Netherlands

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Netherlands Edition



Foreword



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Since its launch in 2016, the PwC Global Sports Survey has taken the pulse of global sport by tracking leaders' views on growth, risks, and opportunities. This year we gathered 517 responses from senior sports executives across 48 countries in addition to 7,250 responses from sports fans across 17 countries, providing a dual perspective on how strategies align with audience expectations.

For the first time, we are delighted to present a dedicated deep dive into the Dutch sports market, based on contributions from 30 sports executives and 500 fans in the Netherlands. Thank you to everyone who shared their perspectives on the current state and future direction of the industry.

In the pages that follow, we assess the growth outlook and explore five themes we believe will shape the next phase of the sports economy: the investment landscape, changing fan behaviours and media consumption, the positive momentum in women's sport, the evolution of stadiums and venues, and sports integrity and governance. The industry's opportunities remain significant, but must be considered alongside macroeconomic uncertainty that could influence consumer spending and investor appetite. This will require the industry to carve a new path, with bold strategies and creative approaches to deliver growth.

A big thank you to our interviewees Joris de Boer, Xander Czaikowski, Yuri van Rijswijk, and Leonne Stentler, whose insights on the Dutch sports landscape deepen and enrich the analysis and provide relevant local nuances.

We hope you find the report thought-provoking and useful to help you navigate change and capture the opportunities ahead.

Introduction

This report provides an in-depth analysis of the Dutch sports market, framed around the core themes from the Global Sports Survey: market growth, sports investment, fandom, women's sport, stadiums & venues, and sports integrity. For each theme, we compare Dutch responses from the Executive Survey (n=30) and Fan Survey (n=500) against global benchmarks. These findings are enriched with perspectives from leading Dutch sports executives across media, investment, and women's sport.

Key insights

1. Market growth: Dutch sports executives are significantly more optimistic about future growth than their global counterparts, projecting annual revenue increases of 10.1% versus 7.4% globally over the next 3-5 years. This confidence is strongest in commercial and sponsorship rights, as well as ticketing and hospitality. However, expectations for betting-related rights and team/franchise valuations are more cautious, reflecting local dynamics such as stricter betting regulations and a smaller media rights market.

2. Sports investment: Sport Tech stands out as a high-potential investment area in the Netherlands, outperforming global averages by six percentage points. Conversely, esports, betting, and fantasy sports attract less investor interest due to regulatory constraints and less developed infrastructure. Investment in rights holders (clubs, leagues, teams) is slightly below global trends as institutional capital in Dutch professional sports is still relatively modest.

3. Fandom: Dutch fan behaviour remains rooted in tradition, favouring established leagues and traditional media channels. Unlike global trends toward influencer-driven formats and digital engagement, Dutch fans prioritise ease of access to content over celebrity-driven experiences. Nevertheless, Dutch sports organisations are proactively adopting digital-first strategies, slightly ahead of the global curve.

4. Women's sport: Women's sport is a shared growth priority, with Dutch and global executives forecasting similar revenue increases of around 25% over the next 3 to 5 years. Notably, a higher proportion of Dutch executives plan to boost investment, signaling progress toward closing the gap with more mature markets like the US and UK. Fan engagement is strong – only 18% of Dutch fans never consume women's sports content – but willingness to pay remains low, posing a challenge for monetisation.



5. Stadiums & venues: Dutch sports fans are highly price-sensitive, ranking affordable ticket prices as their top priority when attending live events, followed by safety, match quality, and cleanliness. Core fundamentals matter far more than immersive experiences or in-game entertainment, which score significantly lower. While preferences vary by age and gender, essentials consistently drive satisfaction.

6. Sports integrity: Both Dutch and global respondents identify match-fixing and game manipulation as the leading integrity risk, followed by doping and performance enhancement. However, Dutch stakeholders place greater emphasis on off-field risks, particularly financial misconduct and discrimination.

View from the top

10.1%

p.a. sports market growth expected by Dutch executives for the next 3-5 years (versus 7.4% global average)

65%

of Dutch executives say sports agencies are the most interesting investment opportunity

73%

of Dutch fans globally still prefer traditional leagues and structures (versus 63% globally)

83%

of Dutch executives see shortened formats (like 3x3 basketball) as the top commercial opportunity

26%

p.a. revenue growth in women's sports expected by Dutch executives over the next 3-5 years

63%

of Dutch respondents expect to boost investment in women's sports over the next 3-5 years

47%

of Dutch fans believe matchday experiences outweigh ticket costs (versus 37% global average)

82%

of Dutch fans believe that athletes should face stricter penalties for cheating

40%

of Dutch fans believe that technology, such as VAR, has not improved fairness in sports

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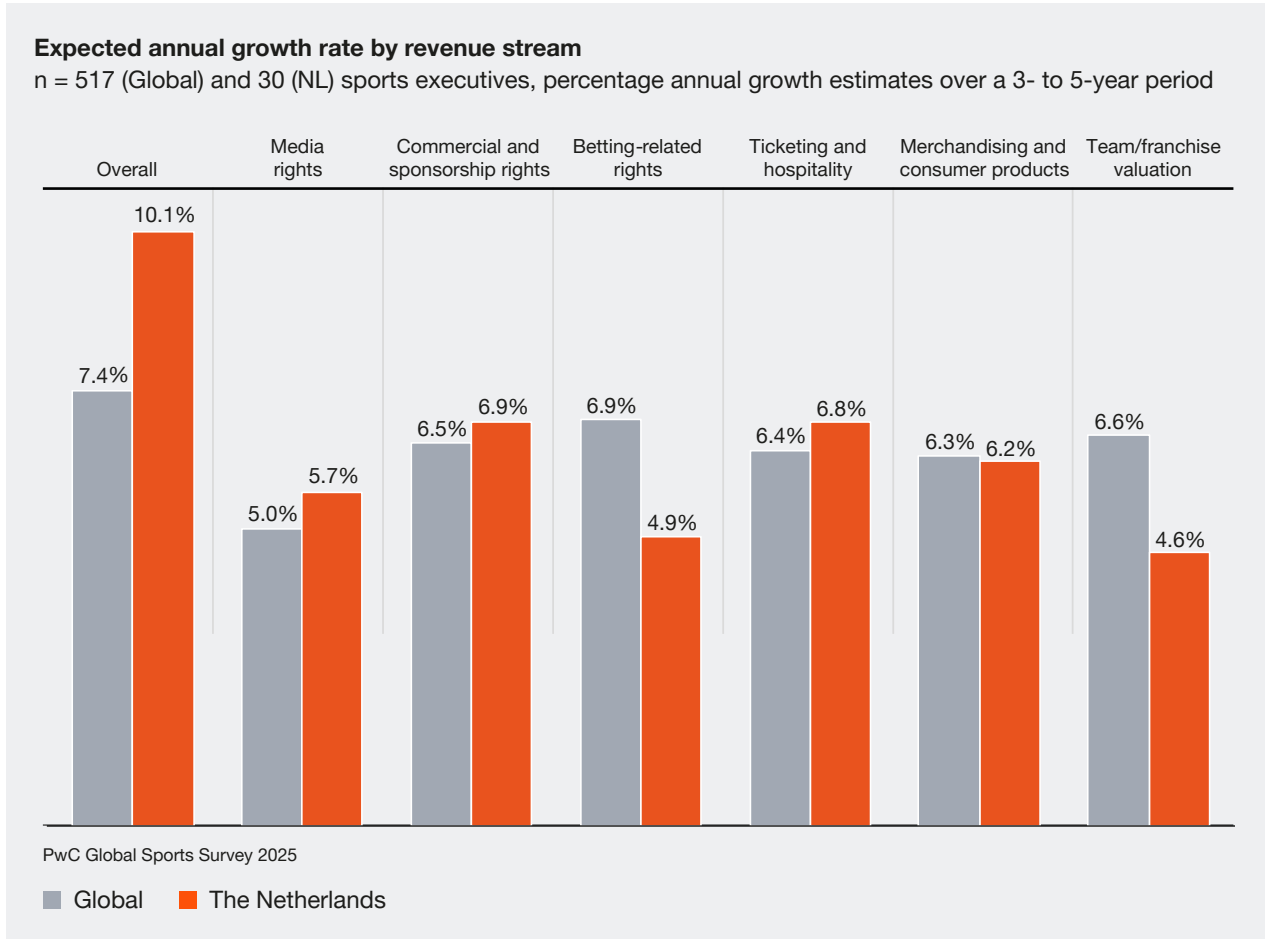
Greatest threats to integrity in sports competitions

Fan perspectives on fairness in sport

1. Market growth

INSIGHT 1

Sports executives in the Netherlands are generally more optimistic about growth over the next 3-5 years compared to the global average



- Sports executives in the Netherlands show a bold optimism about the sector’s growth, anticipating a 10.1% annual increase compared to the global average of 7.4% over the next three to five years.
- This confidence is most evident in commercial & sponsorship rights and ticketing & hospitality, where Dutch expectations exceed global forecasts, signaling strong potential for enhanced fan experiences.
- Conversely, the outlook for betting-related rights (4.9% versus 6.9%) is more cautious, reflecting strict regulations such as advertising restrictions, deposit limits, and the voluntary gambling self-exclusion system (CRUKS) in the Netherlands.
- Similarly, team/franchise valuations (4.6% versus 6.6%) remain lower, as Dutch teams operate in a smaller market with limited media rights opportunities and historically modest foreign institutional investment in professional sports.

Sports still rules, live, on-demand and everywhere in between

Interview – Joris de Boer, Broadcast Sales & Relationships at NHL

Joris de Boer is responsible for media rights sales and strategic broadcaster relationships for the NHL (National Hockey League) across Europe. He previously held senior media partnership roles at FIFA for five years, and started his career at KNVB.

Working in sports media over the past decade has given me a front row seat to a transformation that is still accelerating. When I think back to how I became a sports fan, the landscape was simple: a few TV broadcasts, some radio, teletekst, and the newspaper. You watched whatever happened to be on. If Eurosport was showing biathlon or ski jumping, then that's what I absorbed. My fandom for Arsenal started the same way – by chance – through live Premier League matches on RTL with Bergkamp and Henry at their brilliant best. Today, that world is gone. Sports still rules, but its power now lives across platforms.

This shift has fundamentally reshaped how fandom develops. Instead of discovering sports through whatever happened to be broadcast, fans now curate their own journeys across a diversity of platforms: social media, podcasts, highlights feeds, long form documentaries, direct to consumer services, traditional TV, and everything in between. The consumer, not the broadcaster, is at the wheel. It's on demand, personalised, and highly fragmented. Generational differences shape behaviour, but not as neatly as people often assume. Younger audiences naturally gravitate to short form stories and personalities, discovering sport through athletes long before they attach themselves to teams or leagues. But they won't live on TikTok forever. People age, their habits evolve, and spending power shifts with them. A fifteen year old glued to vertical videos today may become a long form documentary fan or a season ticket holder tomorrow.





This means **rights holders shouldn't chase a single platform. They need a strategic mix that matches the full life cycle of fandom, and they must deliver the right content on the right channels: premium content live, growth content on social, and behind the scenes access wherever fans already are.**

Yet despite all the innovation, one thing remains constant: the enduring power of live sports. Whether it's a World Cup match, a UFC fight, or emerging crossover events like Skyscraper Live, people still crave the shared, live experience. The screen may have changed – phones, tablets, laptops – but the instinct to watch live has not diluted. Netflix's evolution in sports is proof that even the world's most data driven, on demand platform recognises live sport as a disproportionate value driver.

In that broader system, YouTube is still massively undervalued. It functions as both a social platform and a broadcaster, and creators have built sports communities that rival or exceed traditional networks. In golf, for example, YouTube personalities have turned content creation into full businesses, shaping how younger audiences enter the sport. Even elite athletes like Bryson DeChambeau now leverage their channels as major revenue and fan development engines.

Looking at the Dutch market specifically, the dynamics are particularly interesting. We have a mature ecosystem with high cable and internet penetration and a healthy balance of sports on free to air and pay TV channels. But budgets at public broadcaster NOS are tightening, which directly threatens visibility for smaller sports in particular. RTL and Talpa currently hold no major sports rights, which is quite unusual and interesting to see how this evolves. Meanwhile, the three main pay players (ESPN, Ziggo, and Viaplay) each depend on different pillars: domestic football, UEFA competitions, and Formula 1. That focus brings risk, especially if a single tent pole right disappears. At the same time, the cord-cutting trend puts pressure on the business model of some of these players. And the looming question is whether global streamers will enter the Netherlands more aggressively – as Paramount recently did in the UK and Germany. If they do, the economics shift overnight.

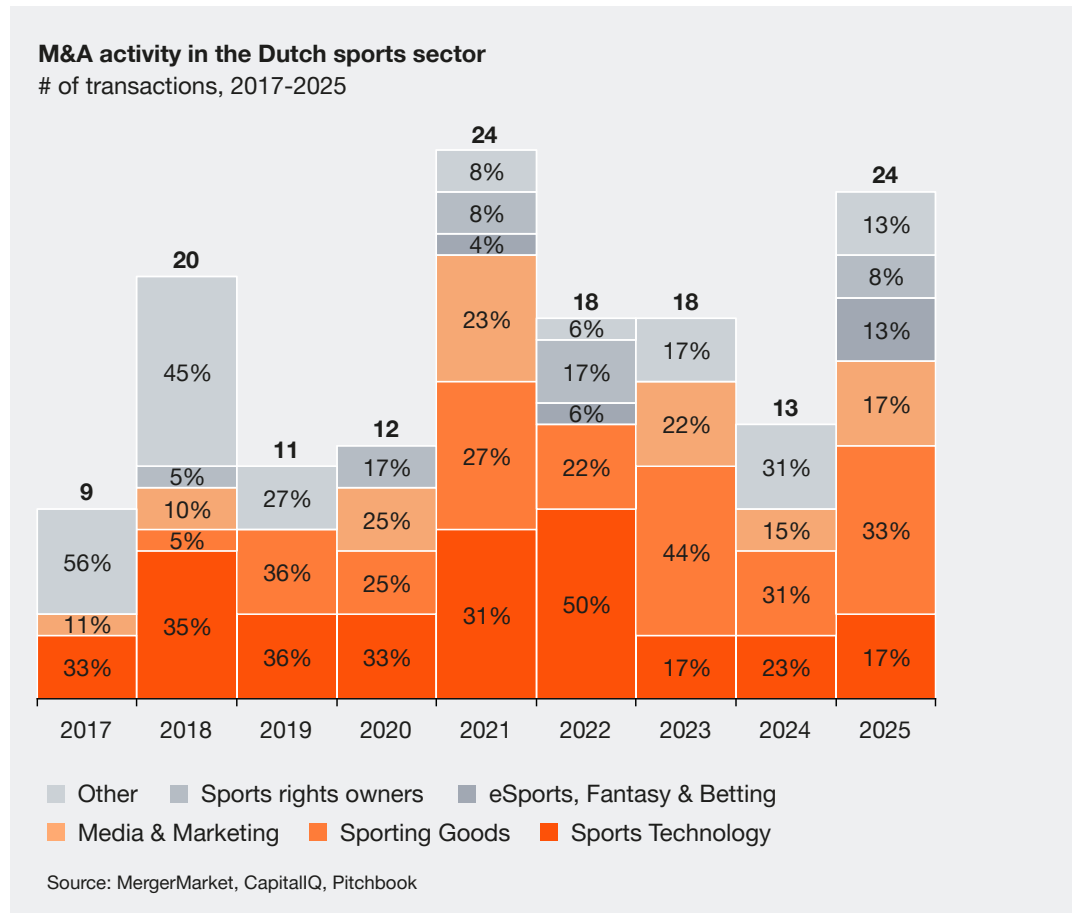
For sports organisations, the priority is clear: to understand where their opportunities lie and to maximise value and visibility across every platform that matters. For broadcasters, the task is harder. Competing with global giants means leaning into what they can't easily replicate: Dutch stars, Dutch stories, Dutch cultural relevance.

Collaborations and mergers – like the RTL/DPG merger – could help build resilient, locally anchored media powerhouses. In this shifting sports media universe, adaptability, authentic local content and a clear value proposition will be the keys to sustaining engagement and thriving long-term.

2. Sports investment

INSIGHT 2

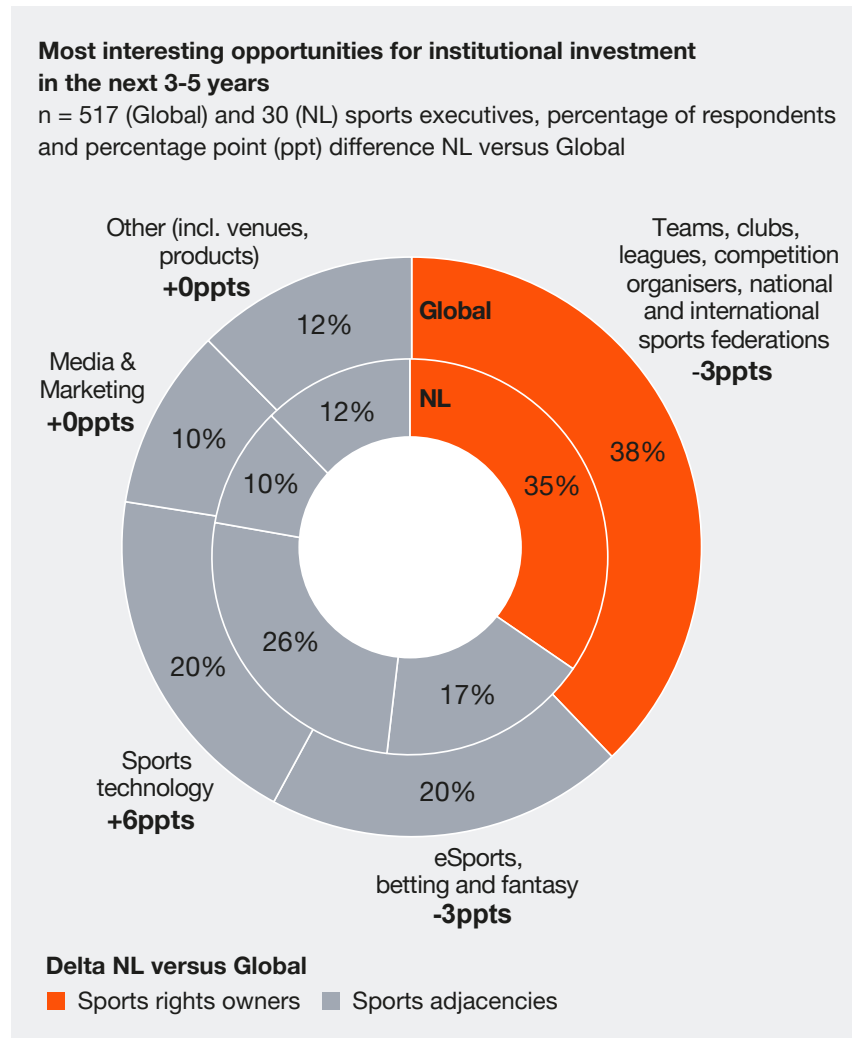
M&A activity in the Dutch market is steadily rising, spurred by investments in Sports Tech and Sporting Goods



- Dutch sports M&A has increased from single digit transactions in 2017 to a mid 20s peak by 2021 and again in 2025, indicating sustained momentum despite year to year volatility. Activity is consistently concentrated in Sports Technology and Sporting Goods, which together underpin overall market growth.
- Investor interest remains strongest in sports technology, particularly apps, platforms, wearables, data analytics and fan engagement solutions. This reflects broader digitisation trends across global sport, as stakeholders seek scalable, data driven growth and deeper fan interaction.
- Sporting Goods assets – spanning apparel, equipment and retail – continue to attract capital, while Media & Marketing deal activity has increased alongside consolidation among agencies and rights driven platforms, highlighting the growing commercial value of fan reach and content ownership.
- Alongside these themes, there is selective and often foreign investment in clubs and teams, such as Yanmar’s acquisition of Almere City FC in 2025, which illustrates how strategic partners and sponsors are using ownership stakes to deepen long term commercial and operational relationships within the Dutch sports ecosystem.

INSIGHT 3

Sport Tech stands out as an attractive investment opportunity in the Netherlands for the next 3-5 years



- **Sport Tech** is emerging as a highly attractive investment opportunity in the Netherlands, outperforming the global average by six percentage points. This strength is underpinned by a robust innovation ecosystem, including national initiatives such as Sportinnovator and regional ones like the Cluster Sports & Technology in the Brainport region. These initiatives connect sports organisations, research institutions, businesses, and government bodies to accelerate breakthroughs that aim to enhance public health and elite sports performance. Adding to this momentum is the Dutch Sport Tech Fund – the country’s first investment fund dedicated exclusively to supporting the (international) expansion of sports technology startups and scale-ups.
- In contrast, **esports, betting, and fantasy** show weaker investor appeal. This reflects the Netherlands’ relatively small esports market compared to neighbouring European countries and the tightening regulatory environment for sports betting introduced in 2024–2025. Recent measures include stricter deposit limits, mandatory interventions for high-risk players, and plans for overarching loss limits, all designed to curb gambling-related harm and reduce aggressive advertising by betting companies.
- Investment interest in **rights owners** (teams, clubs and leagues) in the Netherlands remains slightly below global trends. Historically, Dutch professional sports have attracted relatively limited institutional capital due to the smaller domestic market and modest media rights revenues.
- As the largest professional sport, football has received the most interest. The KNVB (Royal Dutch Football Association) is generally open to foreign investment, but enforces strict governance to safeguard transparency and financial integrity. Measures include a mandatory “Know Your Owner” (KYO) test for anyone acquiring 25% or more of a club and a ban on third-party ownership of players’ economic rights, in line with FIFA regulations. These rules aim to prevent issues like those seen with foreign ownership at Vitesse and ADO Den Haag.

Unlocking potential: How the Dutch Sport sector can attract global capital

Interview – Xander Czaikowski, CEO Estrella Football Group

Xander Czaikowski is a Dutch sports executive and investor with extensive experience at the intersection of sports, media, and entertainment. He is the founder of Estrella Football Group (a Horizontal Multi Club Ownership group) and former CEO of PEC Zwolle, and he advises clubs and investors on governance, strategy, and sustainable value creation in professional football.

Working in sports investment with Estrella Football Group, across multiple European markets, I've seen the sport sector's momentum up close. In the US, investing in sports properties has delivered attractive average returns, often outperforming traditional asset classes like real estate and stocks and drawing capital from private equity, high net worth individuals, and sovereign wealth funds.





However, the American market is becoming saturated. Prices are high, and almost every major club is already owned by venture capital or private investors. That's why many are turning their gaze to Europe, where clubs are still relatively affordable. Yet, investing here isn't as straightforward as it seems. The cultural and operational differences are significant. **In the US, sport is primarily an entertainment business, while in Europe it is still largely a cultural institution.** Investors who arrive with big promises often find themselves facing scepticism, and many projects fail because they underestimate these cultural nuances. The most successful American owners in Europe have learned to minimise interference in sporting decisions and focus instead on enhancing the entertainment proposition around the club.

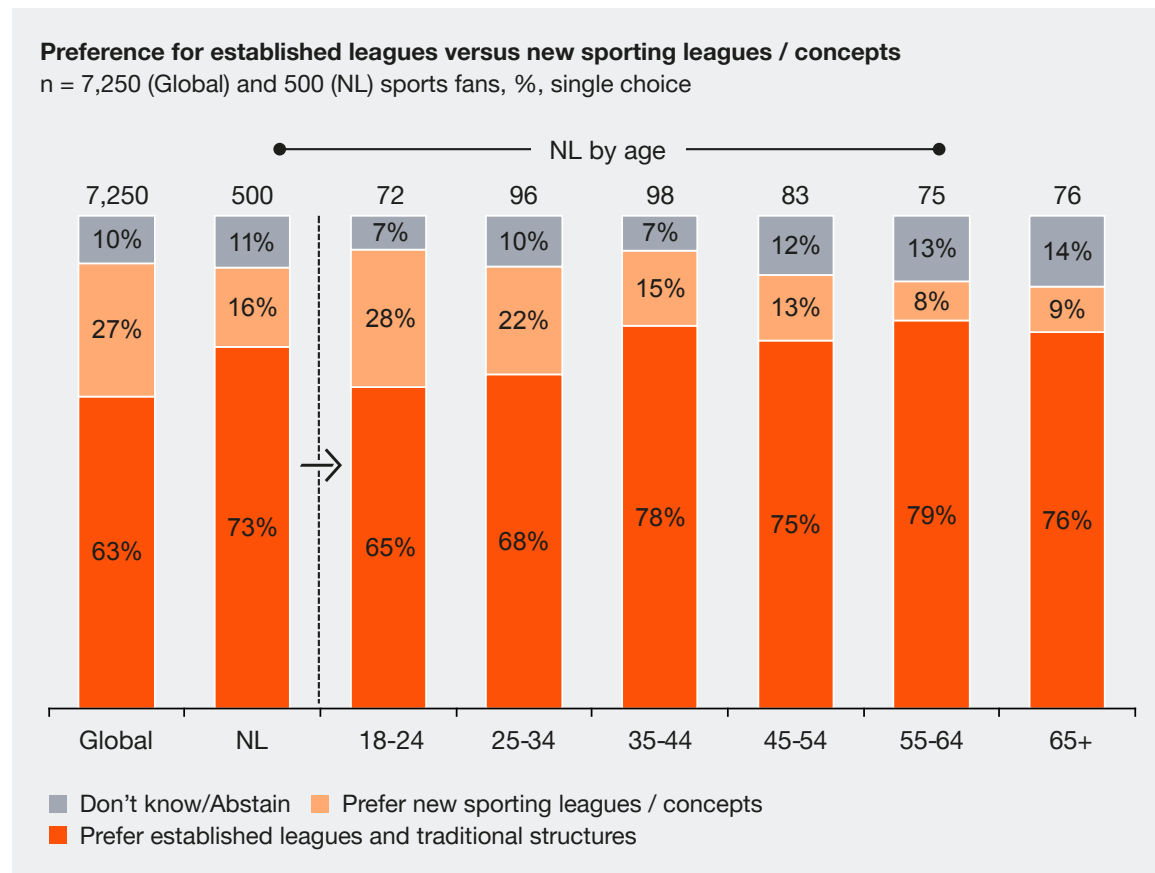
The Dutch market, in particular, is a tough nut to crack. Our regulations are strict, and there's often a scepticism of foreign capital. After high-profile cases like ADO Den Haag, the process for foreign investors to acquire significant stakes in Dutch football clubs has become quite cumbersome and can deter even well-intentioned parties. Foreign investors are more often treated with suspicion than positioned as long-term partners. This mentality risks Dutch clubs falling behind on revenues, facilities, and ultimately European competitiveness. Without new capital, clubs can't innovate or expand their facilities. Take Tottenham Hotspur, for example – their stadium revenues alone surpass the entire budget of Ajax or any other Dutch club, thanks to modern infrastructure and innovative (matchday) experiences.

Despite these challenges, I see plenty of exciting opportunities. Concepts like the Kings League and 3x3 basketball are gaining traction, blending sport with entertainment in ways that appeal to younger audiences. Women's football also offers compelling opportunities, but to succeed, it must be positioned with its own identity and operated independently from the men's side, reflecting its different audience, lifecycle, and commercial dynamics. Sports tech is another area where the Netherlands, especially regions like Eindhoven, has real potential – though countries like Spain and Portugal are catching up fast due to their favourable climates and lower (labour) costs. Beyond Western Europe, markets like Italy, Greece, Slovenia, Croatia, and Poland are particularly interesting for Multi-club ownership (MCO). Clubs there offer modern facilities and lower entry costs, and new tournament structures like the Conference League make it easier for them to reach the European stage and grow revenues.

Looking ahead, **the Dutch sport sector could unlock enormous potential by evolving governance, streamlining regulations, and embracing a more open mindset toward foreign investment.** Imagine a KNVB unit dedicated to guiding clubs through capital raises, or ownership rules that protect integrity without creating impossible barriers. A shift in perception – seeing foreign capital as a catalyst rather than a threat – could enable clubs to modernise facilities, innovate commercially, and compete globally. The choice is no longer whether Dutch clubs want foreign capital, but whether they want to shape it or be shaped by markets elsewhere.

INSIGHT 4

Fans in the Netherlands lean more traditional and appear less open to emerging sporting leagues and concepts



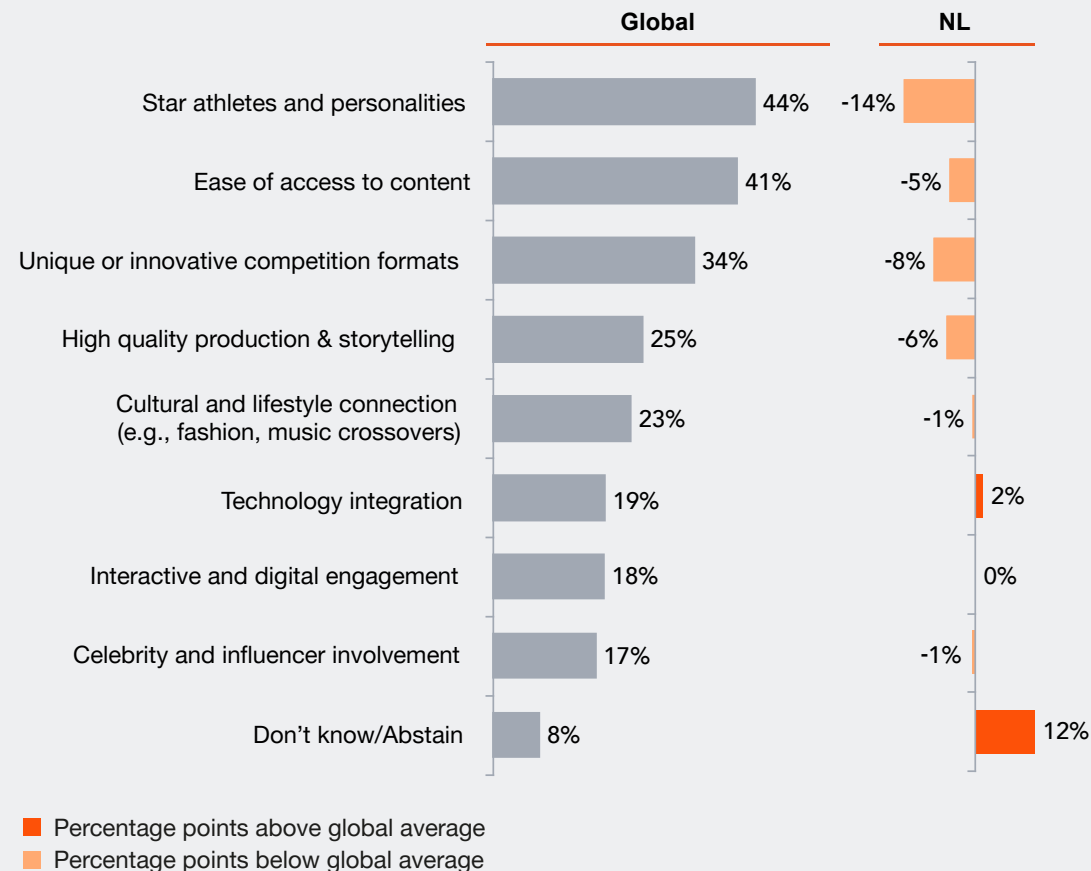
- In recent years, new sporting formats such as the FIFA Club World Cup and Kings League have gained traction globally. Despite this innovation, most fans still favour tradition: 63% globally prefer established leagues and structures, compared to just 27% who favour new concepts.
- Dutch fans are even more conservative than the global average: 73% of respondents in the Netherlands prefer traditional leagues, with only 16% open to new formats and 11% undecided. Age plays a significant role in openness to innovation. Younger Dutch fans (18-34) show greater willingness to embrace new formats, with 28% of those aged 18-24 favouring emerging concepts. However, this openness declines sharply with age, dropping to just 9% among fans over 65.
- For rights holders and investors, the cultural attachment to established competitions and structures combined with the generational divide suggests that while innovative formats may gain traction over time, traditional structures are likely to remain dominant in the Netherlands in the near term.

INSIGHT 5

Dutch fans are less swayed by star athletes & personalities and mainly care about ease of access to content

Key factors driving interest in new sporting leagues / concepts

n = 7,250 (Global) and 500 (NL) sports fans, % of mentions in top three by respondents



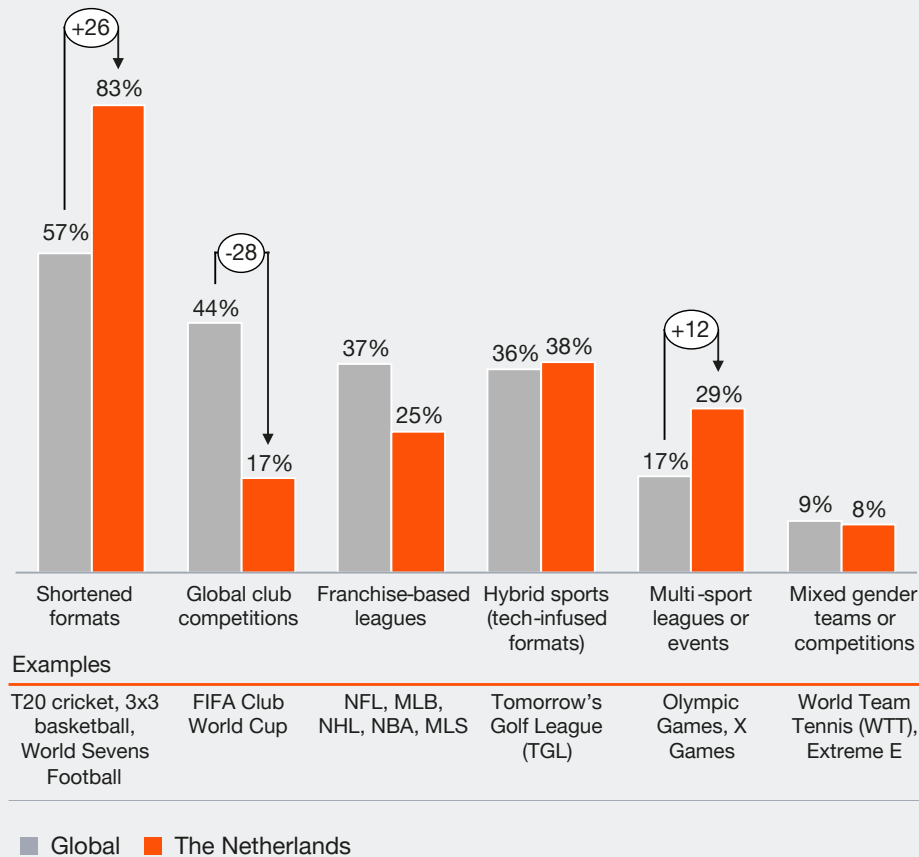
- Globally, fans are drawn to new sporting concepts by star athletes and personalities, with 44% citing this as a key driver. Concepts like Kings League and Baller League have capitalised on this by recruiting famous footballers as team managers and owners, creating influencer-driven formats, and broadcasting on platforms such as YouTube and Twitch to maximise reach and engagement.
- In contrast, Dutch fans rank star power much lower at 14 percentage points below the global average, indicating that celebrity appeal is far less influential in the Netherlands. Instead, Dutch fans prioritise ease of access to content, suggesting that convenience and accessibility matter more than big names when it comes to engaging audiences. Other innovation-led factors, such as unique competition formats and high-quality production also resonate less with Dutch fans compared to global trends, each scoring 6-8 percentage points below average.
- Interestingly, 20% of Dutch respondents abstain from choosing any driver, significantly higher than the global average of 8%. Combined with the generational trend – where younger fans (18-34) are more open to innovation – this signals an education gap and untapped potential. New concepts may gain traction if positioned around practical benefits like easy viewing and digital engagement, rather than focusing solely on star power or lifestyle branding.

INSIGHT 6

Dutch sports executives see most commercial potential in shortened formats, such as 3x3 basketball

Emerging competition formats with most commercial growth potential (Rank)

n = 517 (Global) and 24 (NL) sports executives, % of mentions in top two by respondents

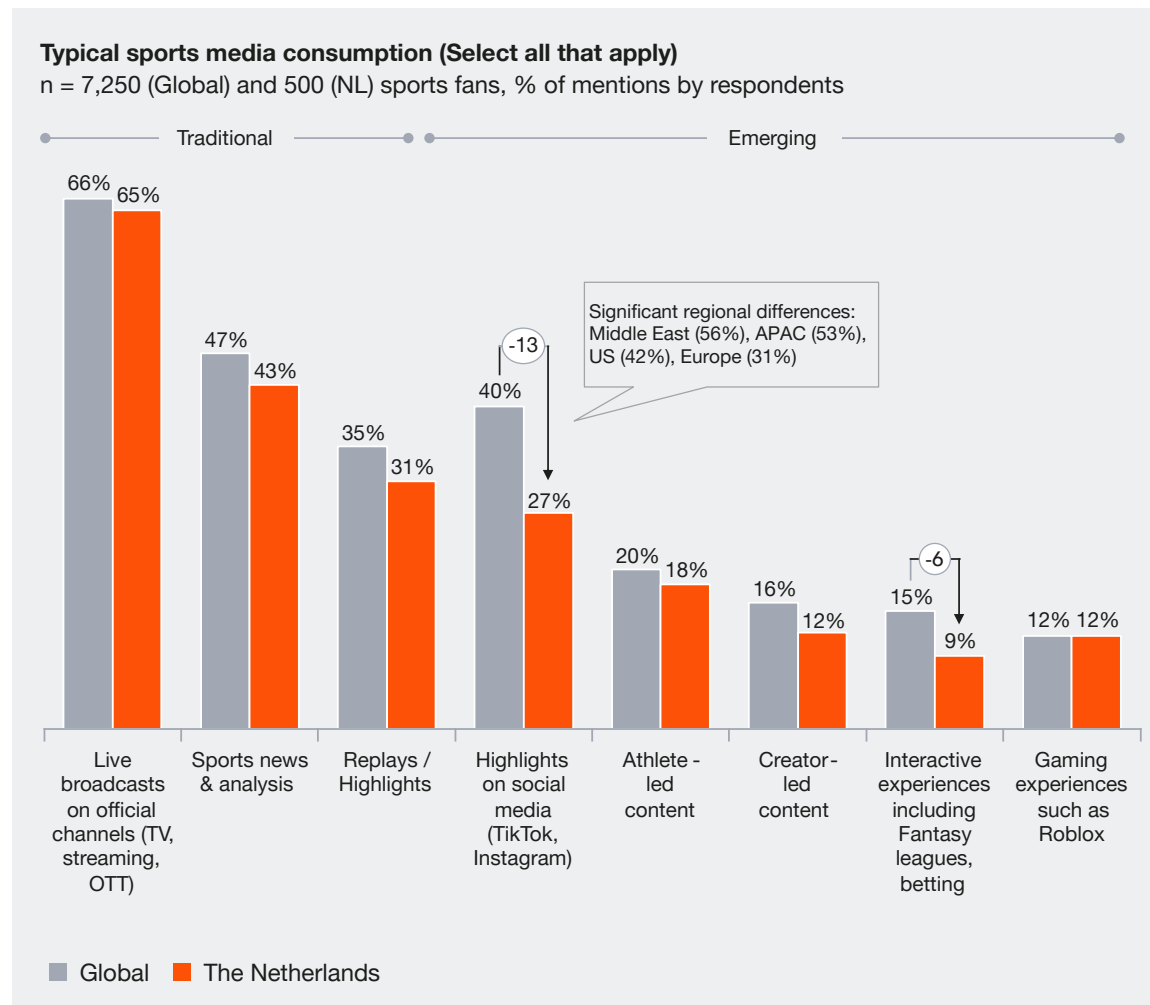


- There is a clear and substantial gap in interest for shortened formats between Dutch sports executives and their global peers: 83% of Dutch respondents rank shortened formats (e.g., 3x3 basketball) as having the most commercial growth potential, compared to 57% globally – a 26-point difference.
- This strong preference likely reflects the Netherlands' success in 3x3 basketball, where Dutch teams captured men's gold at the Paris 2024 Olympics and women's gold at the 2025 European Championships, reinforcing the country's position as a frontrunner in this fast-paced format. This success is supported by a strong domestic structure, with the Pro League providing a clear pathway from local tournaments to international competition.
- Conversely, global club competitions rank far lower in the Netherlands, with only 17% citing them as a top growth driver versus 44% globally (a 28-point gap). This disparity may stem from the fact that Dutch clubs did not participate in the inaugural FIFA Club World Cup in 2025, limiting local exposure and enthusiasm for globalised club formats. It highlights a market dynamic where domestic success and visibility strongly influence commercial outlook, making it harder for international concepts to gain traction without local representation.
- Other noteworthy differences include the Netherlands' higher interest in multi-sport leagues or events (29% versus 17% globally), signaling an appetite for diversified formats that can attract broader audiences. Meanwhile, franchise-based leagues and hybrid sports show relatively balanced interest, suggesting that while innovation matters, Dutch executives favour concepts that align with existing strengths and cultural familiarity rather than radical departures from tradition. As seen previously, this also aligns with current fan preferences for established leagues and structures.

3. Fandom

INSIGHT 7

Dutch fans still favour traditional sources of sports media and are less likely to consume highlights on social media



- Dutch fans continue to favour traditional sources of sports media. 65% of Dutch respondents consume live broadcasts, nearly identical to the global average of 66%. Sports news and analysis (43%) and replays/highlights (31%) also rank highly, reinforcing the strong preference for conventional viewing habits.
- In contrast, Dutch fans are far less likely to consume highlights on social media, with only 27% citing platforms like TikTok or Instagram, compared to 40% globally (a 13-point gap). This suggests that while social-driven formats are gaining traction worldwide, they have yet to resonate strongly in the Netherlands. Emerging formats such as athlete-led content (20%) and creator-led content (18%) also trail behind global averages, indicating slower adoption of influencer-driven engagement.
- Another notable difference is the relatively low interest in interactive and gaming experiences, including fantasy leagues and betting (9% versus 15% globally). Combined with the fact that Dutch fans reference fewer sources overall (2.2 versus 2.5 globally), this points to a market that values simplicity and reliability over experimentation. For rights holders and media platforms, this means that traditional broadcast remains critical, while digital strategies should focus on ease of access and incremental engagement rather than disruptive formats.

INSIGHT 8

Live action dominates fan preferences, but content creators should tailor their offerings by age

Most important attributes for sports content

n = 500 sports fans, ranking based on % of mentions by respondents

Rank	Overall (NL)	By age					
		18-24	25-34	35-44	45-54	55-64	65+
1st	Live Action	Entertainment	Live Action	Live Action	Live Action	Live Action	Live Action
	Highlights	Official content	Highlights	Entertainment	Highlights	Highlights	Entertainment
	Entertainment	Live Action	Entertainment	Highlights	Entertainment	Entertainment	Analysis
	Authenticity	Humour	Authenticity	Official content	Analysis	Official content	Authenticity
	Official content	Authenticity	Humour	Analysis	Official content	Analysis	Official content
	Analysis	Storytelling	Community	Storytelling	Authenticity	Authenticity	Highlights
	Humour	Highlights	Official content	Community	Humour	Storytelling	Humour
	Storytelling	Interactivity	Analysis	Authenticity	Storytelling	Community	Player access
	Community	Analysis	Storytelling	Humour	Community	Interactivity	Exclusivity
	Interactivity	Community	Player access	Interactivity	Player access	Player access	Interactivity
	Player access	Player access	Interactivity	Player access	Data	Data	Data
	Exclusivity	Data	Data	Exclusivity	Interactivity	Humour	Community
13th	Data	Exclusivity	Exclusivity	Data	Exclusivity	Exclusivity	Storytelling

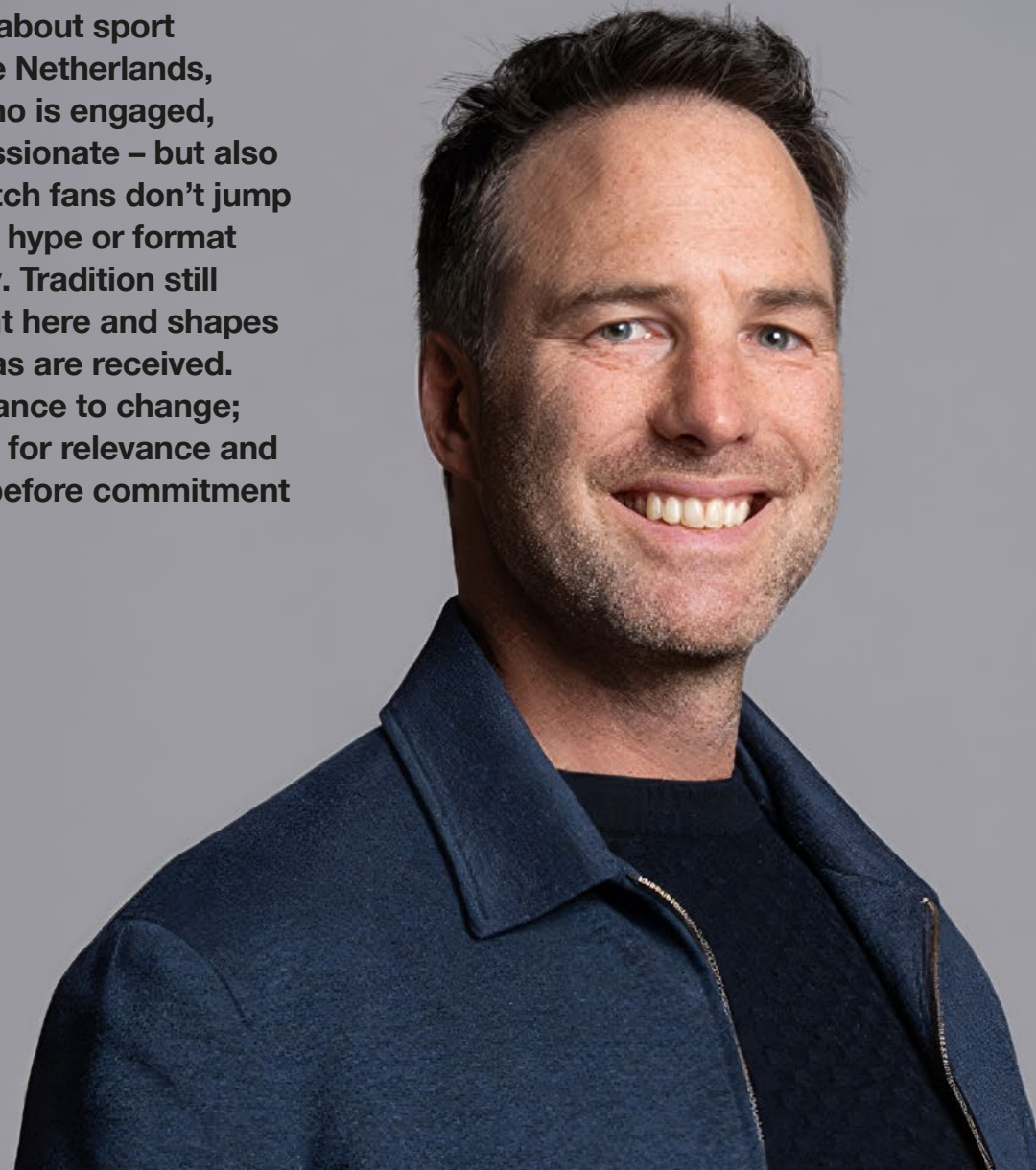
- Live action and highlights dominate as the most valued attributes in sports content, consistently ranking at the top across nearly all age groups. This suggests that immediate, dynamic, and visually engaging content is crucial for Dutch sports fans, reinforcing the idea that real-time and highlight-driven footage create the most significant engagement.
- Nuances emerge when examining different age demographics. For instance, younger fans (18-24) prioritise entertainment and humor, showcasing a preference for content that entertains beyond just the sport itself. In contrast, older fans, particularly those aged 35 and above, place more importance on expert analysis and authenticity, indicating a deeper appreciation for insightful, credible commentary and genuine sport narratives.
- Interestingly, attributes such as player access, interactivity, exclusivity, and data consistently rank lower across all age groups, suggesting these areas might be less critical in driving broad fan engagement. Overall, these insights highlight the importance for sports content creators to tailor their offerings by age, balancing between live excitement, entertaining elements, and in-depth analytical content to maximise fan engagement.

Relevance – not reach – is the future currency in Sport

Interview – Youri van Rijswijk, Managing Partner Players United

Youri van Rijswijk is Managing Partner at Players United, a full-service football marketing and activation agency working for brands and rights holders in national and international football. Driven by his passion for the game and his extensive knowledge of the football world, he advises and supports organisations in sponsor strategy, concept development, campaigns, and brand activation.

When I think about sport fandom in the Netherlands, I see a fan who is engaged, loyal, and passionate – but also selective. Dutch fans don't jump on every new hype or format straight away. Tradition still carries weight here and shapes how new ideas are received. It's not resistance to change; it's a demand for relevance and authenticity before commitment follows.





That tension between tradition and innovation is something I see every day in my work at Players United. Clubs in the Netherlands are doing many things right. Stadium experiences have improved enormously, and there has been real investment in the fan journey before, during, and after matches. But compared to what I experience abroad – especially in the United States – the gap remains clear. **American sports are built around moments, interaction, and fan participation. Our sports culture, by contrast, is still rooted in traditional formats. Yet the way fans connect with sport has changed fundamentally. Fandom today is no longer just about clubs; it's about identity.**

This shift is most visible among younger fans. Loyalty is increasingly attached to individuals rather than institutions. My own daughters aren't fans of Paris Saint Germain – they're fans of Jackie Groenen. If she moves clubs, their loyalty likely moves with her. We've seen this at scale with Messi, Ronaldo, and many others. Athletes now build their own communities through social media, often reaching far beyond the clubs or federations they represent. Those communities are personal, direct, and highly loyal.

That sense of community has become central to modern fandom. Fans no longer want to be treated as one large, anonymous group; they want to be recognised as individuals. For clubs and rights holders, the challenge is clear: how do you move from mass communication to true hyper personalisation? Short attention spans intensify that challenge. Keeping young fans engaged requires constant relevance, grounded in insight, culture, and data. In the Netherlands, we remain cautious when

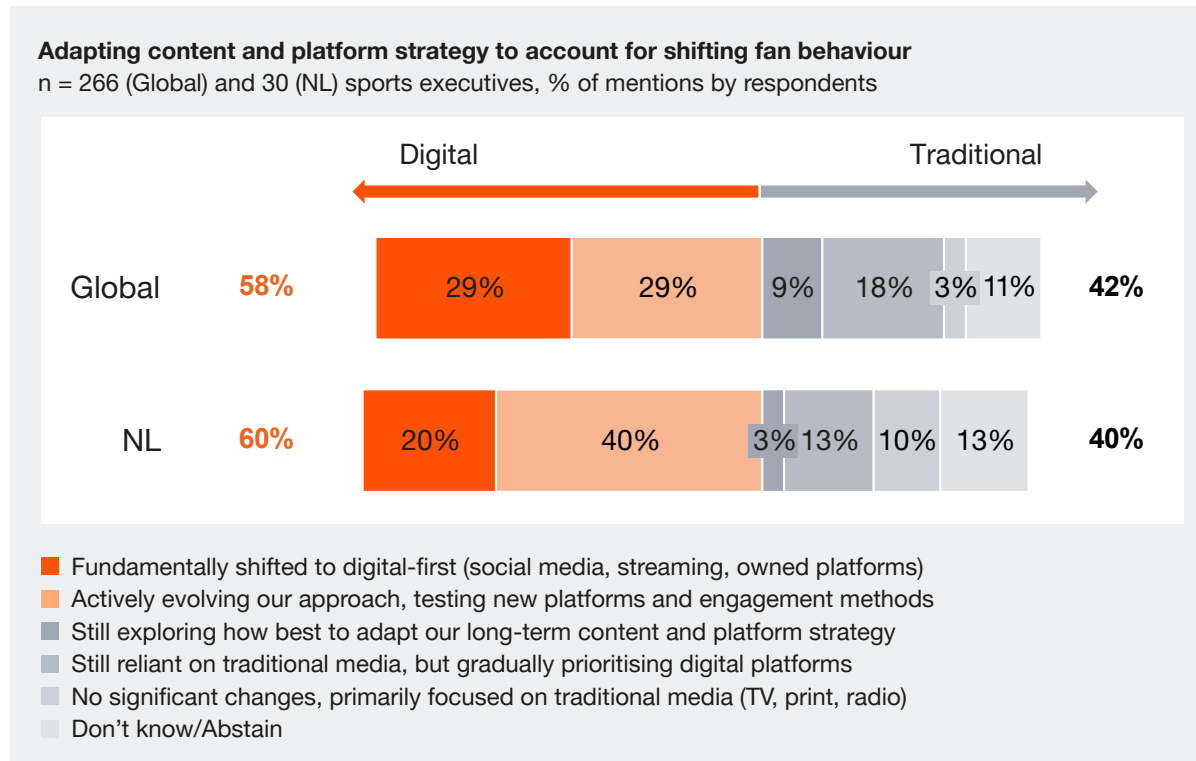
it comes to data usage, and that cultural sensitivity matters. We're not anti commercial, but we are selective. Commercial messages must feel meaningful and authentic, or fans disengage quickly.

This is where formats like the Kings League feel genuinely different. The competition is social-first, built around participation rather than passive consumption. Matches are shorter, rules evolve, and every minute has the potential to become a viral moment. Through fan voting and real time influence, supporters feel their presence truly matters. What's especially powerful is that the Kings League doesn't rely on its own channels for reach. It's built on creators. Influencers stream matches to their existing audiences, drawing fans into the ecosystem organically. Reach isn't the real currency here – relevance is. And relevance can't be bought, it has to be earned. That participatory mindset reflects a broader shift in how younger fans experience sport. They don't just want to watch; they want to engage, influence, and belong. Sport is no longer separate from music, fashion, or culture – it's part of a wider lifestyle.

Traditional football and new formats like the Kings League may not yet compete for the same fan. But the trajectory is clear: attention is harder to earn, loyalty is more fluid, and relevance must be constantly renewed. For clubs, federations, and brands, the message is clear: think less like a rights holder and more like a brand. Be culturally aware, always on, and willing to move from content owner to content enabler. Because in modern sport fandom, relevance and authenticity aren't optional. They're everything.

INSIGHT 9

Sports organisations in the Netherlands are already actively moving to a more digital-first model

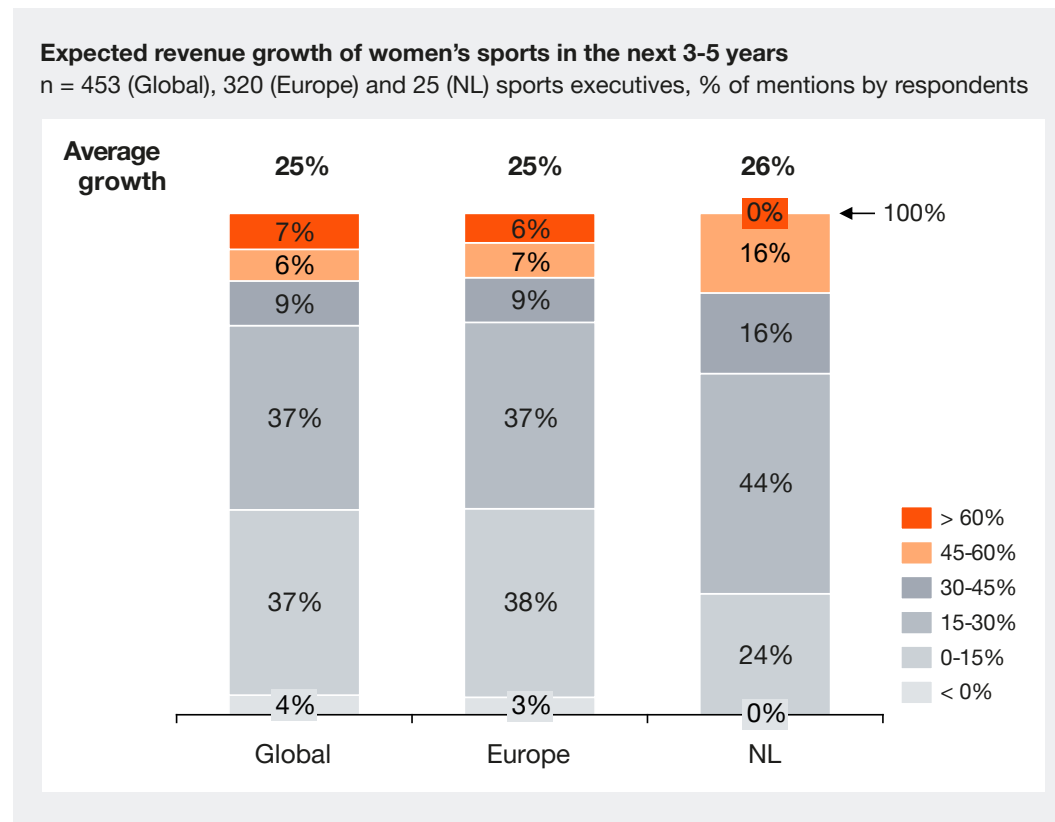


- Sports organisations in the Netherlands are actively moving toward a digital-first model, slightly ahead of the global trend. 60% of Dutch respondents report prioritising digital platforms, compared to 58% globally. Notably, 40% of Dutch organisations are actively evolving their approach (testing new platforms and engagement methods) versus 29% globally, signaling a strong commitment to adapting content strategies for shifting fan behaviour.
- Despite this progress, only 20% of Dutch organisations have fundamentally shifted to a fully digital-first strategy, similar to the global figure of 29%. The majority remain in transition, gradually prioritising digital while still relying on traditional media. This reflects a pragmatic approach: embracing innovation without abandoning established channels that continue to deliver reach and revenue.
- Interestingly, 10% of Dutch organisations report no significant changes, focusing primarily on traditional media such as TV and print, compared to 3% globally. Combined with the relatively low share of organisations still exploring long-term strategies (3% versus 9% globally), this suggests that Dutch sports entities are more decisive in their digital evolution.

4. Women's sport

INSIGHT 10

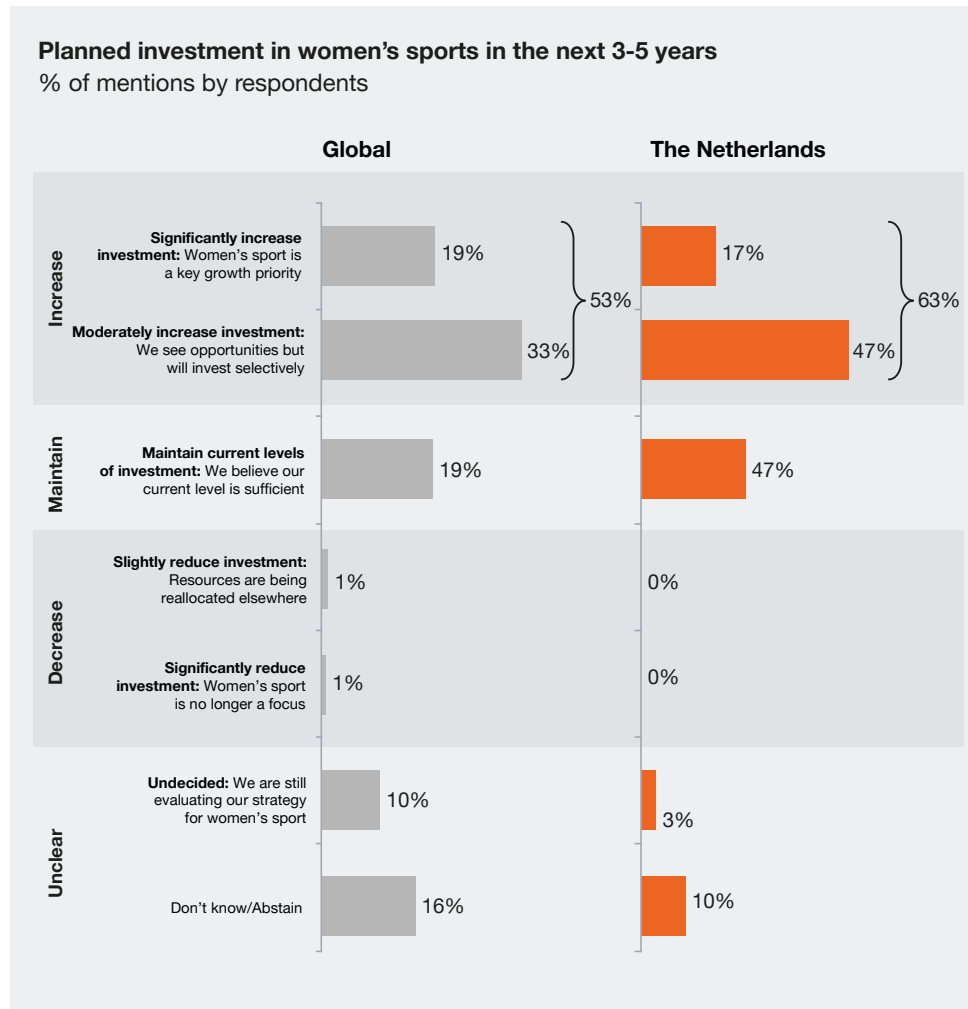
Overall growth expectations for Women's sport are similar for the Netherlands as at global and European level



- Sports executives in the Netherlands are equally bullish about the commercial potential of women's sport as their global and European counterparts. The Netherlands projects a 26% average revenue growth over the next three to five years, marginally above the Global (25%) and European (25%) forecasts.
- This optimism reflects strong momentum across multiple disciplines. The Dutch women's field hockey team continues its strong run – winning nine World Cup titles and defending Olympic gold in Paris 2024 – while the national women's volleyball team is forging a young and empowered roster, building on domestic grassroots investment and strong performance in the Volleyball Nations League. On the football pitch, the Oranje Leeuwinnen's popularity has been spurred by consistent presence and strong performance at recent Euros and World Cups.
- These high-performing teams reflect broader participation and success, fueled by a general cultural willingness to support girls in traditionally male-dominated sports.

INSIGHT 11

However, a larger share of Dutch executives expect to increase investment going forward



- A higher share of Dutch sports executives plan to increase investment in women's sports compared to the global average. 63% of Dutch respondents expect to boost investment over the next 3-5 years, versus 53% globally, with most opting for moderate increases (47%) rather than significant jumps (17%). This signals strong confidence in growth potential, but also a cautious approach – likely reflecting the need to balance ambition with resource constraints.
- One reason additional investment may be needed is the historic underfunding of women's sports in the Netherlands compared to more mature markets like the US and UK. These countries have seen major strides in media rights deals, sponsorship, and professional league development, while Dutch women's sports still lack comparable commercial infrastructure. Closing this gap will require targeted funding for marketing, broadcast visibility, and grassroots development to build sustainable fan engagement.
- Another factor is the rapidly rising global expectations for women's sports. If Dutch organisations fail to accelerate investment, they risk losing competitive ground in sponsorship and talent development. With the Oranje Leeuwinnen's strong international profile, field hockey dominance, and growing volleyball and cycling programmes, the Netherlands has a solid foundation – but scaling these successes into commercial growth will depend on bold, strategic investment in the coming years.
- Signs of investment are emerging. For example, in late 2025 the KNVB announced a €100k annual subsidy for all Eredivisie and First Division women's teams for two years to stimulate domestic football development. However, sustained and scalable investment will be critical to turn momentum into long-term growth.

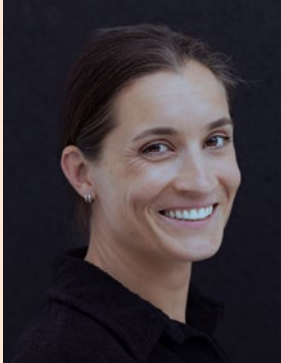
Why Women's football needs belief, structure, and bold choices

Interview – Leonne Stentler, football analyst and consultant

Leonne Stentler is a Dutch former professional footballer who played for ADO Den Haag, AFC Ajax and the Dutch national team. She is now a football analyst for NOS and ESPN, covering both men's and women's football, and leverages her passion to advance the women's game as a freelance consultant.

Women's football has come a long way, with growing visibility and passionate fans. Yet despite that progress, significant barriers still prevent the sport from reaching its full potential. Having lived the game both on and off the pitch, I know that passion and talent are only the beginning. To truly elevate women's football and unlock sustainable growth, we need more than momentum – we need data, dedicated resources, professional infrastructure, and bold investment.





One of the most pressing challenges is the lack of data. In men’s football, detailed statistics like goals, assists, and passing metrics, shape scouting, media narratives, and financial decisions. In the women’s game, these fundamentals are often missing. Without reliable data, clubs undervalue players, media can’t tell richer stories, and sponsors and investors struggle to understand what they’re investing in. Without numbers, it becomes difficult to demonstrate the sport’s true worth.

But this data gap reflects a larger issue: the absence of specialist roles focused on developing the women’s game. I genuinely believe every professional club should have a director dedicated to women’s football, backed by experts in marketing, storytelling, and commercial strategy. Showing matches is not enough. We need to spotlight players’ personalities, explain tactical developments, and present achievements with the same seriousness and visibility seen in the men’s game. That is how perceptions shift and how fanbases grow.

Infrastructure is another essential pillar. Progress cannot rely on players alone. It requires qualified coaches, medical teams, analysts, and performance experts who understand the specific demands of the women’s game. Historically, pathways into coaching have been unwelcoming or financially inaccessible to women. When courses are male dominated, expensive, or culturally uninviting, the talent pipeline stays small and nothing changes.

Looking abroad shows us what’s possible. The English FA offers a powerful example: investing to keep national players in the

domestic league, creating an independent governing entity for the WSL, and requiring all Premier League clubs to contribute financially to the women’s game, whether they field a women’s team or not. This collective commitment is a major reason their league has grown so quickly and so visibly. But England isn’t the only model worth studying. Italy has made important step by step progress, including introducing a collective labour agreement and improving professional standards around top women’s clubs. They’ve shown that even without England’s resources, significant growth is achievable through consistent structure, clear standards, and long term vision – an approach that aligns more naturally with what the Netherlands could realistically adopt.

Because the truth is simple: we cannot copy paste the English system. Our clubs are smaller. Budgets are tighter. Governance is more fragmented. If we want real progress, we must build a model that fits our reality. Looking five to ten years ahead, I imagine a league where every player earns at least a living wage; where clubs have strong leadership and full time staff; where data is standard; and where the media covers the women’s game with the same curiosity and depth as the men’s.

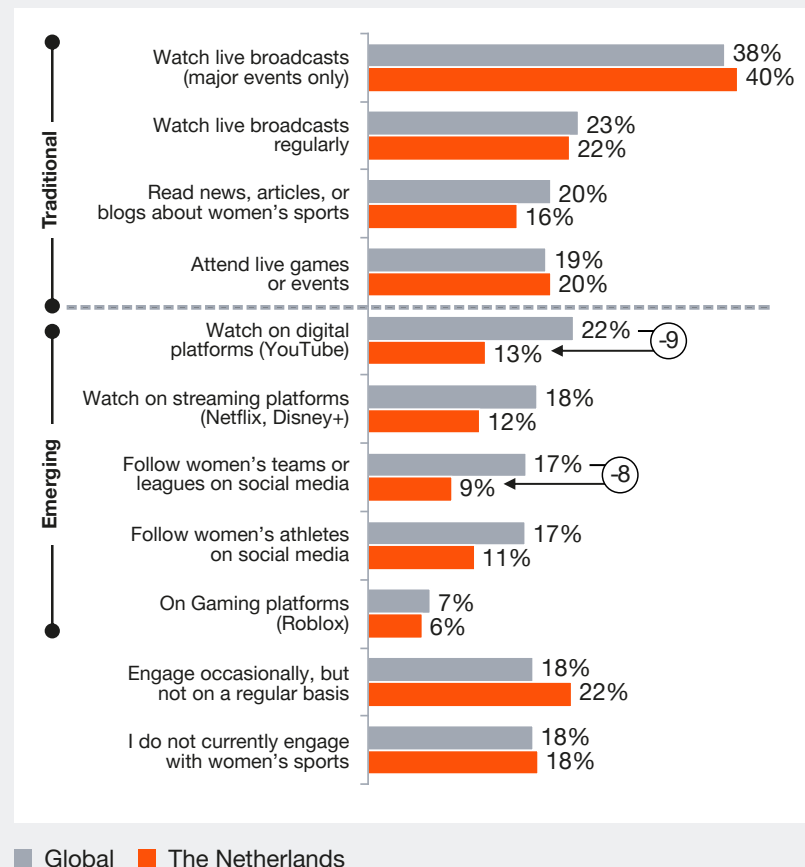
To get there, we will need bold decisions. That’s why I believe an independent structure for the Eredivisie Vrouwen – outside the KNVB – could be transformative. A dedicated organisation with real authority and resources could accelerate progress far more effectively than the current model allows. Ultimately, women’s football is more than a sport. It’s a movement – one that deserves belief, structure, and the courage to choose a different path. With the right vision, we can unlock the potential that has always been there.

INSIGHT 12

Dutch fans already consume women's sports content quite regularly, especially around major events

Current engagement with Women's Sports

n = 7,250 (Global) and 500 (NL) sports fans, % of mentions by respondents, 2025



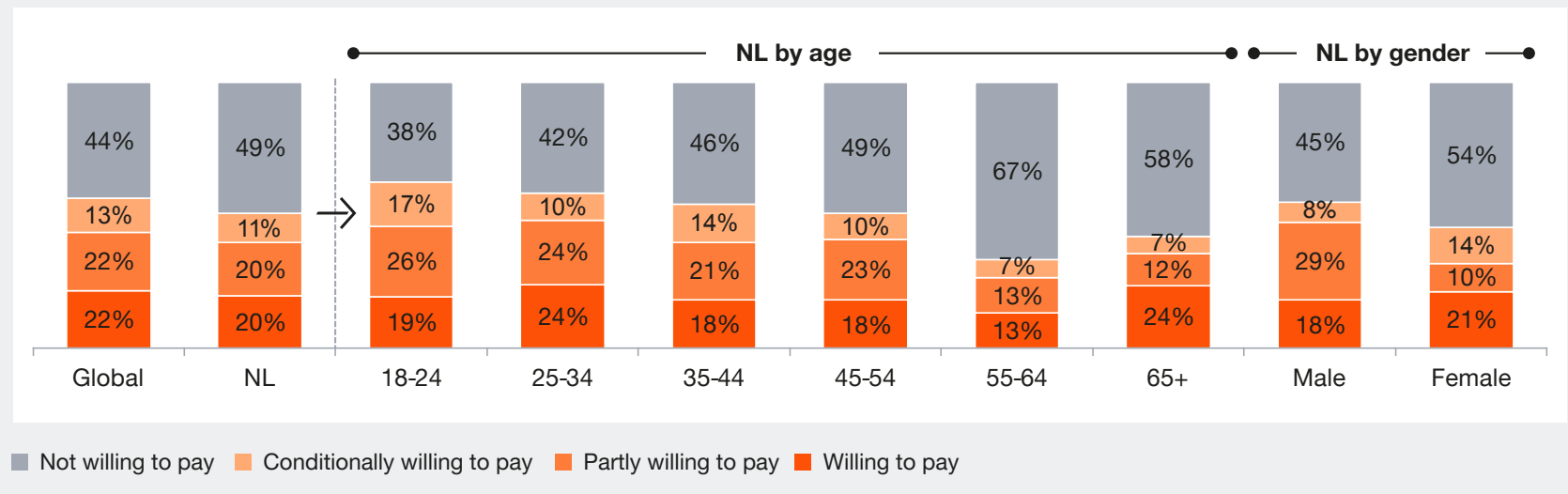
- Dutch fans engage with women's sports primarily through traditional channels, similar to global trends but with some notable differences. 40% of Dutch respondents watch live broadcasts of major events, slightly above the global average (38%), and 22% watch live broadcasts regularly. Attendance at live games or events is also comparable (20% NL versus 19% global).
- However, digital engagement lags: only 13% of Dutch fans watch on platforms like YouTube, compared to 22% globally (a 9-point gap). This disparity is partly driven by limited content availability: for example, while the WSL in the UK streams non broadcast matches live on YouTube, the Eurojackpot Eredivisie channel primarily shares highlights, resulting in lower fan engagement. A similar pattern emerges on social media. Just 9% of Dutch fans follow women's teams or leagues, compared to 17% globally – an eight point deficit. This signals that awareness, accessibility, and discovery remain core challenges for growing digital fan engagement.
- Within the Netherlands, gender differences are clear. Women are more likely than men to follow female athletes on social media (17% versus 6%) and to read news or blogs about women's sports (18% versus 14%). Men, on the other hand, slightly over-index on watching live broadcasts of major events (41% versus 39%) and attending live events. Both groups show relatively low engagement with emerging formats like gaming platforms or interactive experiences, suggesting that growth will depend on improving visibility and convenience rather than introducing niche engagement models.
- Age is another critical factor shaping engagement. Younger fans (18-24) are far more active in attending live games (32%) and following athletes on social media (21%), compared to just 8% and 6% respectively among fans aged 55+. Streaming platforms also skew younger, with 25% of 18-24-year-olds using services like Netflix or Disney+, versus only 5% among those over 55.

INSIGHT 13

Willingness to pay is lagging and must be addressed to bridge the gap between engagement and monetisation

Willingness to pay for access to women's sports content and events

n = 7,250 sports fans, % of mentions by respondents



Note: Willing to pay (as much as for men's sports content), Partly willing to pay (somewhat willing to pay but less than for men's sports content, or only willing to pay for major events), Conditionally willing to pay (only for exclusive content/perks or only if revenue supports women's leagues, athletes or grassroots directly), Not willing to pay (prefer free access / don't pay for any sports content, men's or women's)

- Despite strong growth in women's sports, willingness to pay for content and events remains limited. In the Netherlands, 49% of respondents say they are not willing to pay, while only 20% are willing to pay at the same level as for men's sports (slightly below the global average of 22%).
- Age and gender differences provide important nuance. Younger fans (18-34) show the highest intent to pay – whether partly or conditionally – while fans aged 55+ strongly favour free access.

Women are slightly more willing to pay than men (21% versus 18%) but also more likely to reject payment altogether (54% versus 45%). Men over-index in the "partly willing" category (29% versus 10%), suggesting a preference for selective or event-based spending. Meanwhile, women show higher conditional willingness (19%), indicating interest in exclusive perks or behind-the-scenes access rather than standard subscriptions.

- These patterns confirm that women's sports remain in an early monetisation phase. For

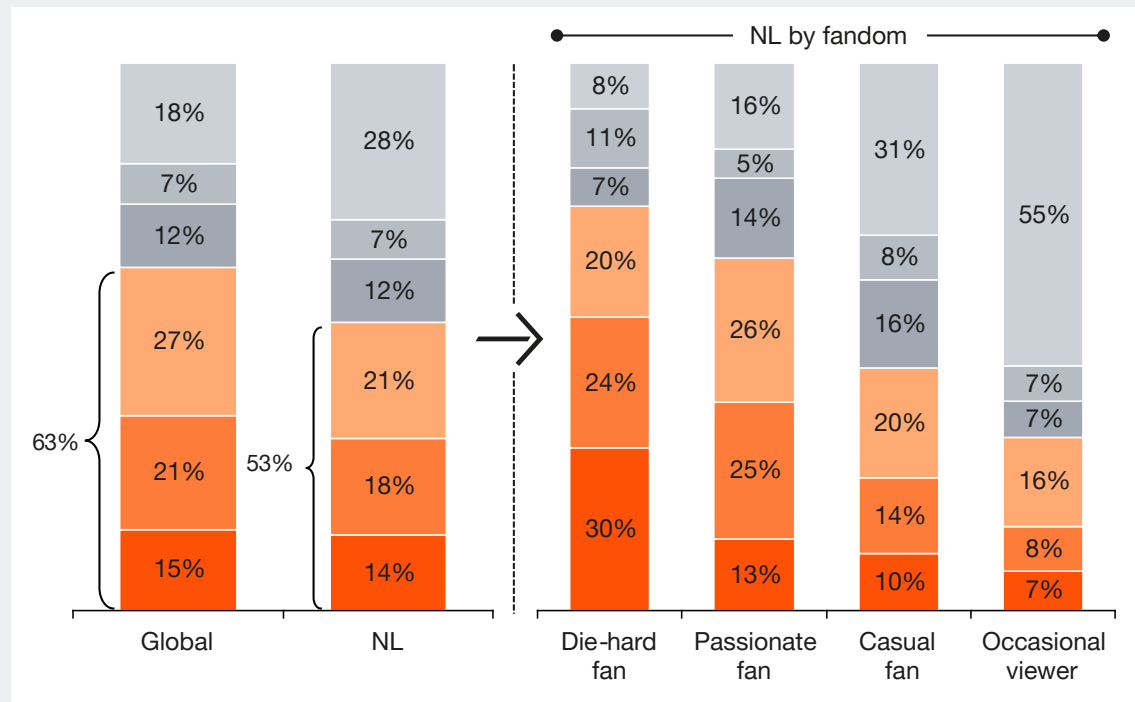
Dutch rights holders and broadcasters, the priority should be reach over revenue: leveraging free or ad-supported models to grow audiences. At the same time, targeted digital offerings for younger fans, such as streaming bundles and premium experiences, could unlock incremental revenue. Flexible pricing models like event passes or freemium tiers will be essential to bridge the gap between engagement and monetisation, while sponsorship-driven strategies remain the primary revenue engine in the short term.

5. Stadiums & venues

INSIGHT 14

Fans that attend sporting events in the Netherlands perceive weaker value-for-money than the global average

Alignment of matchday experience with the cost of tickets and other expenses
 n = 7,250 (Global) and 500 (NL) sports fans, % of respondents



- I don't attend live events
- Far below: the price is too high for the experience provided
- Slightly below the cost: the experience is decent but not fully worth the price
- On par with the cost: the experience matches what I expect for the price
- Slightly exceeds the cost: the experience feels like good value for money
- Far exceeds the cost: the experience is well worth the price

- Dutch fans perceive weaker value-for-money on matchdays than the global average. While 63% of fans globally say the live experience is on par with or exceeds the cost of tickets and other expenses, this drops to 53% in the Netherlands. The Netherlands also has a notably higher share of non attenders (28% versus 18% globally), a signal that pricing, scheduling, and/or transport frictions are suppressing attendance and eroding perceived value.
- Fan passion matters: die-hard and passionate fans are far more likely to feel the experience matches or exceeds the price, whereas casual and occasional viewers are disproportionately represented among those who don't attend or feel the experience is below value. In practical terms, this means enhancements aimed at the core fan base can lift value scores, but conversion of casual/occasional fans will require tackling cost and convenience head on.

INSIGHT 15

Dutch fans are price sensitive and prioritise essentials (such as affordable ticket prices, match quality and crowd safety) when attending sporting events

Important elements when visiting a stadium

n = 7,250 (Global) and 500 (NL) sports fans, average score out of 5

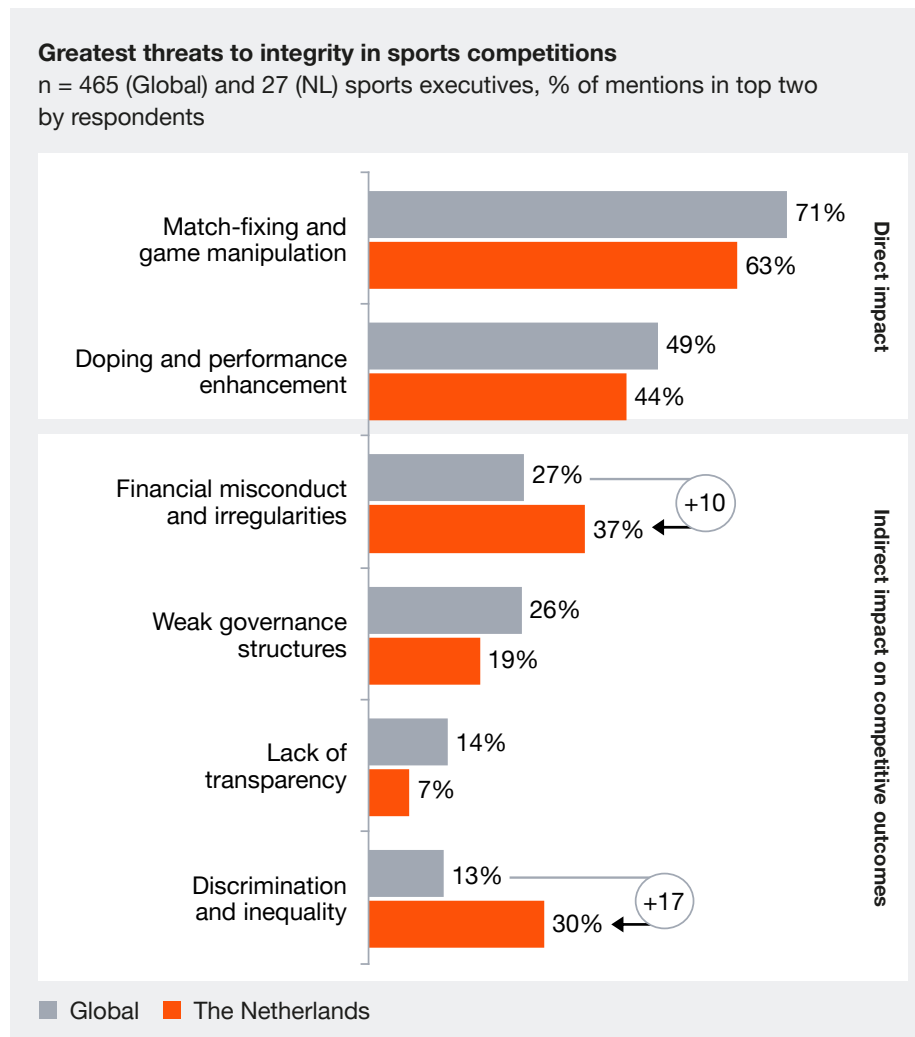
Global			The Netherlands		
Rank	Score		Score	Rank vs Global	
#1	4.3	Safety and crowd management	4.2	#3	↘
#2	4.3	Quality of the match	4.2	#2	↔
#3	4.3	Cleanliness, hygiene and sufficient restrooms	4.2	#4	↘
#4	4.2	Affordable ticket prices	4.2	#1	↗
#5	4.2	Seating comfort and pitch visibility	4.1	#5	↔
#6	4.1	Accessibility and ease of navigation	4.0	#6	↔
#7	3.7	Immersive/interactive fan experiences	3.7	#8	↘
#8	3.7	Food and beverage experience	3.6	#7	↗
#9	3.6	Sustainable practices	3.3	#9	↔
#10	3.4	In-game entertainment	3.3	#10	↔

- Dutch fans place the highest importance on affordable ticket prices, ranking it #1 (average score 4.2), ahead of global fans who prioritise safety and match quality. Safety and crowd management, along with match quality and cleanliness, also score highly in the Netherlands (all at 4.2), showing that fans value a secure and comfortable environment as much as the game itself. In contrast, immersive fan experiences and in-game entertainment rank near the bottom (3.7 and 3.3), indicating that Dutch fans are less driven by add-ons and more by core fundamentals.
- Gender and age differences should also be considered. Women rate safety and cleanliness slightly higher than men, while men place more emphasis on seating comfort and immersive experiences. Older fans (55+) consistently score safety and accessibility higher than younger fans, while younger fans show more interest in interactive experiences and entertainment. Across all groups, sustainability and in-game entertainment remain low priorities.
- Dutch fans are highly price-sensitive and prioritise essentials, such as affordable tickets, safety, match quality, and cleanliness, over premium or entertainment-driven experiences. Rights holders should prioritise investments in security, seating, and hygiene standards, while pricing strategies will remain competitive to avoid suppressing attendance. Enhancements like immersive experiences can be secondary, targeted at younger segments rather than the broader fan base.

6. Sports integrity

INSIGHT 16

Dutch executives place greater emphasis on off-field integrity risks, particularly around financial misconduct and discrimination



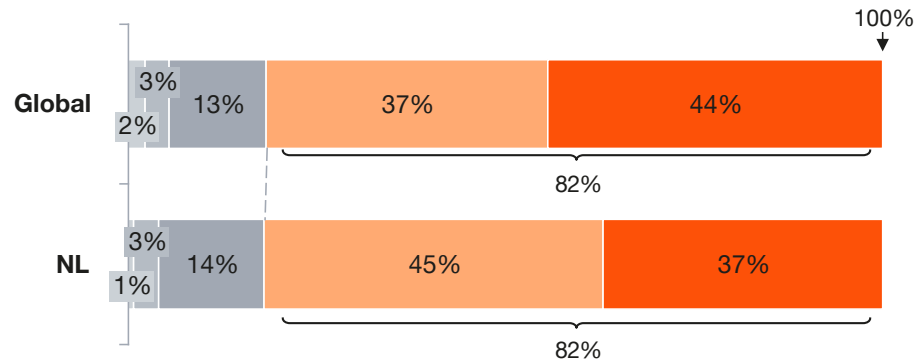
- Globally, the top perceived risk to sports integrity is match fixing and game manipulation (71%), followed by doping and performance enhancement (49%). Dutch respondents share that hierarchy, but with lower intensity: match fixing 63% and doping 44%. This suggests that while Dutch stakeholders still view on-field tampering as the primary risk, they consider its likelihood or impact slightly lower than the global benchmark – likely because these issues have historically been less prevalent in the Netherlands. Dutch sport enjoys a strong reputation for fair play and robust anti-doping systems, supported by the Dutch Doping Authority and strict compliance rules.
- In contrast, Dutch executives place greater emphasis on off-field integrity risks, particularly organisational ethics and social responsibility. Compared with global peers, they are significantly more concerned about financial misconduct and irregularities (+10 percentage points) and discrimination and inequality (+17 percentage points). Weak governance structures also rank higher in the Netherlands, while lack of transparency is mentioned less often, signaling a nuanced focus on systemic and social issues rather than purely operational gaps.
- This divergence is likely driven by recent high-profile cases and societal trends. The ADO Den Haag and Vitesse ownership controversies exposed vulnerabilities in foreign investment and transparency, reinforcing calls for stricter financial oversight. At the same time, discrimination has become a growing challenge, with official reports in the Netherlands more than doubling in 2024 and prompting the KNVB to expand anti-racism programmes and enforcement measures. Public discourse and media coverage have amplified these concerns, shifting attention toward governance and inclusion issues and explaining why off-field risks now rank higher for Dutch executives than traditional integrity threats like doping or match-fixing.

INSIGHT 17

Integrity has a broad mandate in the Netherlands, but fans want fairness delivered with proportionality and game flow preserved

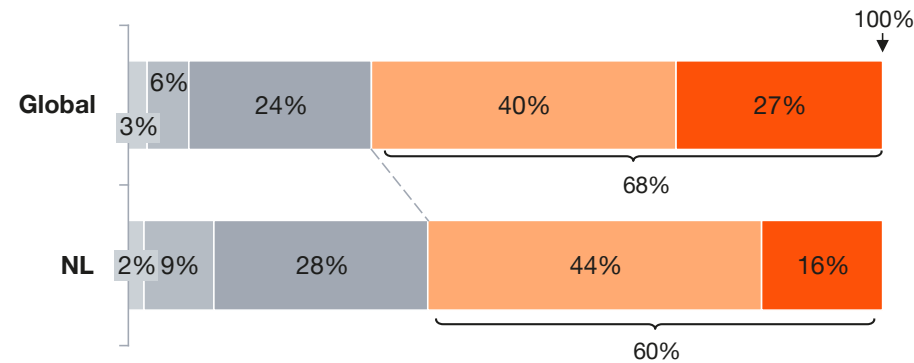
Athletes should face stricter penalties for cheating (e.g. doping, match-fixing)

n = 7,149 (Global) and 492 (NL) sports fans



Technology, such as VAR, has improved fairness in sports

n = 6,951 (Global) and 480 (NL) sports fans



Strongly disagree Disagree Neutral Agree Strongly agree

- Dutch fans align with global sentiment on integrity: 82% in both groups support tougher sanctions for offences like doping and match fixing, but Dutch intensity is lower (37% “strongly agree” NL vs. 44% global). This could be driven by the Netherlands’ traditionally strong trust in rules and institutions, which fosters support for fairness, while a pragmatic culture favours proportionality over punitive extremes. Moreover, relatively few high profile domestic scandals keep urgency, and thus “strong agreement”, slightly muted.
- Dutch fans are more sceptical about tech’s impact on fairness: 60% agree versus 68% globally, with less “strong agreement” (16% NL vs. 27% global) and more disagreement. Possible drivers include fan frustration with visible delays and interruptions in Eredivisie matches, high expectations for consistency across leagues and competitions, and a preference for the flow of the game – making perceived marginal gains in accuracy feel outweighed by the cost to match rhythm.
- In conclusion, integrity has a broad mandate in the Netherlands. Support is strong for clean and fair sport, yet technology must prove its value on the pitch through speed and consistency.

Survey Background

This report combines two primary data sources to reflect the perspectives of both industry decision makers and sports fans.

PwC's Global Sports Network fielded an online Executive Survey between June and September 2025, capturing responses from 30 senior executives working across the global sports ecosystem in the Netherlands (including leagues, clubs, and federations) and 517 Globally. All respondents held C suite or director level roles at the time of participation. Quantitative findings were supplemented with interviews with industry experts and the experience of PwC teams drawn from executive level engagements and project delivery.

To complement the executive view, PwC conducted a Global Fan Survey online between June and July 2025. The fan dataset reflects the collective opinions of 500 respondents from the Netherlands balanced by gender and age group. The total fan survey featured 7,250 respondents across 17 countries, covering similar themes as the Executive survey. Results are reported as percentages of respondents (and, where noted, top two or three selections) and are indicative of sentiment at the time of fieldwork.



PwC Netherlands Sports Business Advisory Team

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The PwC Netherlands Sports Business Advisory Team brings together a diverse group of industry and functional experts. We collaborate with a wide range of private and public stakeholders, providing strategic and operational guidance tailored to their needs.

Our clients value our comprehensive service portfolio, industry benchmarks, and integrated consulting solutions made possible through our extensive global PwC Sports Business network.

We are dedicated to being a vital part of this dynamic and socially significant industry, and we welcome the opportunity to support your projects. We hope the first Dutch market edition of this publication offers you valuable insights.

For more information on how we can support, visit our [website](#).

Credits

A big thank you to all the senior industry executives who participated in this year's survey. A special thanks to the interviewees who have all enriched this report further with their expert insights. Thank you to the PwC Sports team members who have helped shape the thought-provoking content in this report. And lastly, a special thank you to the PwC Marketing team for their hard work and creativity to bring the report to life.

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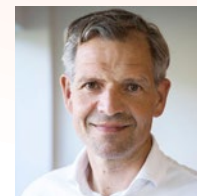
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