

SUMMARY

SPORTS INNOVATION MONITOR

A first assessment in a variety of
sport and exercise domains

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Definition of sports innovation:

‘Sports innovation concerns the development and/or introduction of new products, services and sports activities that directly affect the practice of sport and which are primarily directed towards the promotion of sport and exercise.’



Report commissioned by:



Principal findings



Background and principles



Outcomes



Factors influencing sports innovation



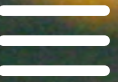
The effect of sports innovation on sports performance



General recommendations



Principal findings¹



The 1st Dutch Sports Innovation Monitor has revealed that sports organisations have, on average, a higher level of fundamental new solutions than most other Dutch organisations.

Sports innovation pays

The Monitor has also shown that innovation pays. Sports organisations that score highly in sports innovation deliver better performance – in financial terms, in terms of sporting achievement, and in increasing the number of sportspeople. At the same time these sportspeople and club staff members are clearly happier with their sports organisation.

1 The sports innovation monitor principally describes the links between sports innovation and performance indicators. The research makes no claims about causality. To better determine the causal nature of these links, more research is needed that follows developments within sports organisations over a longer period.

Elite sporting events and programmes are doing fairly well in sports innovation. Innovation in sports clubs and in recreational sports (non-organised sports such as running, hiking and cycling), however, is lagging; in these sports, innovation generally means acquiring new equipment or facilities that are not necessarily particularly innovative for that sport or exercise.

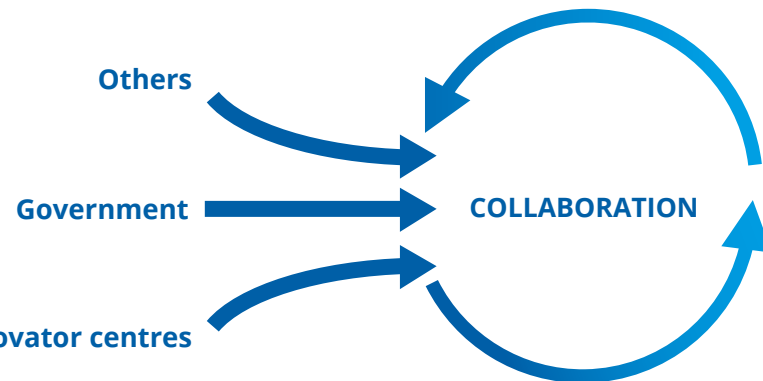
Copying vs. innovating

In sports clubs and recreational sports, copying a successful ('best practice') sports innovation is often chosen above introducing changes in their offering which are fundamentally new for that specific type of sports. Research and development (R&D) and the training of club staff members or volunteers are given little attention in grass-roots sports.

> Principal findings

Co-creation

The Monitor has also shown that sports organisations invest relatively little in collaboration with external parties (co-creation). This is a missed opportunity; research has shown that co-creation with parties such as the government, Sportinnovator centres and others (though not suppliers or clients) is linked to a higher degree of sports innovation.





Sports innovation in the Netherlands ²

Overall score:

6,2

Large elite sports events:

7,9

Elite sports programmes:

6,9

Professional football
organisations:

6,7

Fitness centres:

6,3

Sports clubs:

5,0

Non-organised sports:

4,6

² To derive the scores shown above, the score on a 7-point scale was converted to a value on a scale from 1 to 10. This is not to say that 5.5 stands for a 'pass score'. The scores are intended to quantify sports innovation.

Background and principles



Introduction

What is the scale of sports innovation in the Netherlands? To answer this question, Sportinnovator commissioned the Amsterdam Centre for Business Innovation and the Mulier Institute to carry out a baseline measurement study to provide a picture of how the Netherlands stands with regard to sports innovation in 2021.

The study examined sports innovation within a variety of sports and exercise forms in elite sports, grass-roots sports and recreational sports. It drew a distinction between organised, non-organised and commercial sports.³ The study included over 100 sport organisations, including professional football organisations, elite sports programmes run by sports federations, the organisers of (elite) sports events, tennis and volleyball clubs, fitness centres, and bodies active in recreational running, hiking and cycling in the Netherlands.

The Sports Innovation Monitor is the result of a unique study that has never been carried out before in comparable form, in the Netherlands or elsewhere.

3 By 'Commercial sports' we mean sports providers with a profit motive or a commercial business model, such as fitness centres



The Amsterdam Centre for Business Innovation has considerable experience in carrying out innovation monitors in a great many sectors and regions. The Mulier Institute focuses on monitoring and research in sport and exercise. The study was supervised by a focus group comprising representatives from the sports world.

Indicators of sports innovation

To reveal sports innovation and make it measurable, this monitor defined three indicators of sports innovation:

Degree of newness:
The development and/or introduction of something new (a new product, service, or sporting activity).

Frequency:
The number of sports innovations and the number of sportspeople who were immediately involved or who made use of them.

Intended impact:
Sporting impact (performance improvement), social impact and economic impact.





With regard to the 'impact' indicator, we understood sports innovation as being directed primarily towards improving sports and exercise forms in terms of performance improvements, social impact and economic impact. We held the meaning of 'social impact' to include promoting an active lifestyle and a positive sports culture. We understood 'economic impact' to include reducing health care costs and promoting employment.

To measure impact we looked at the degree to which an innovation was linked to the principles and ambitions of the Dutch National Sports Agreement (Nationaal Sportakkoord) and the Dutch National Knowledge Agenda on Sport and Exercise (Nationale Kennisagenda sport en bewegen).

Questionnaires

Extensive questionnaires were employed to determine how sports organisations scored on the three indicators and which factors fostered innovation in a sports organisation. A distinction was drawn between technological factors, such as investment in new sports equipment and facilities, and non-technological aspects, such as the skills of staff members and volunteers and the degree of collaboration in innovative activities.



Outcomes



Above the national average

The degree of radical product and service innovation⁴ in sports innovation is 13% higher than in the average Dutch organisation. This means that in the forms of sport and exercise we studied, more effort was devoted to innovation in what sports organisations can offer, than is devoted to comparable forms of innovation in the average organisation in the Netherlands.

Copying versus innovating

Although this innovation in what sports organisations can offer, is 'new' for the sports organisation concerned, the innovations themselves are nevertheless rather conservative for the sports discipline in question and exercise in general. The degree of newness in what sports organisations offer is 9% lower than that of innovations in the average Dutch organisation.

Innovation in what sports organisations can offer, consists principally of the adoption of best practices from other sports organisations. The Dutch government and sports federations have promoted this practice for some years, which could explain this finding/trend.

⁴ Innovations aimed at new markets and/or clients, and which involve knowledge lying outside the existing framework of the organisation concerned



The advantage of the rapid, wider dissemination of sports innovations is that more sports organisations, and therefore more sportspeople, can make use of them. This then raises the legitimacy of the innovation, and this raises the likelihood that other parties – including suppliers – will engage more closely with this innovation.

A disadvantage of this copycat behaviour is a less distinctive character: from a market perspective the organisation seems to be standing relatively still, so to speak. This is particularly relevant to elite sports organisations and in the fitness sector, where innovation in what sports organisations offer, has a direct influence on whether sportspeople remain loyal to a fitness club or switch to another.

Lower score on R&D and co-creation

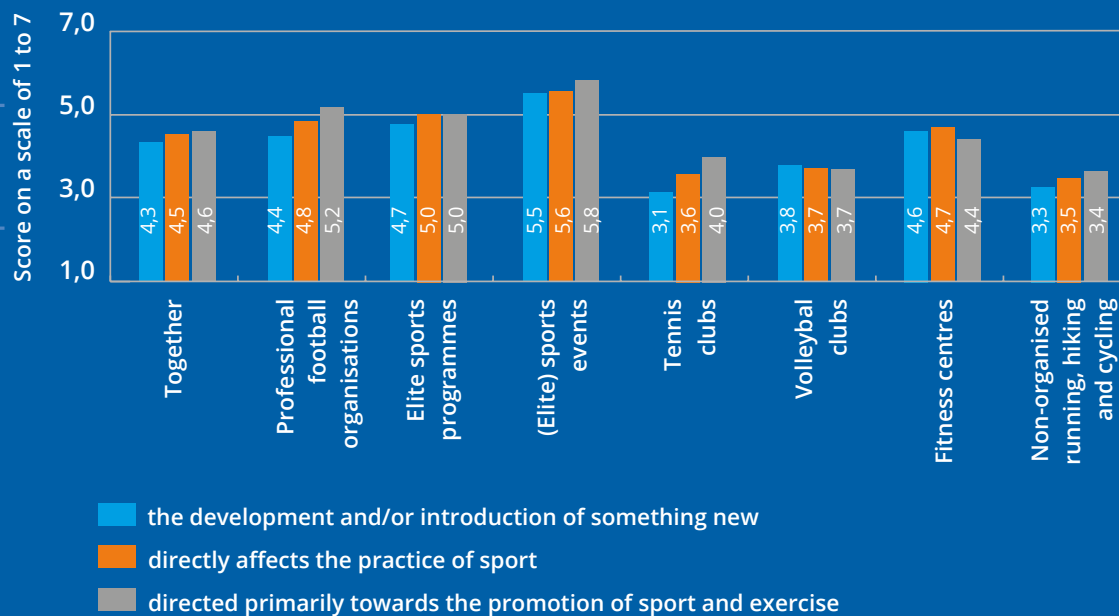
Sports organisations invest relatively little (4% less than the average Dutch organisation) in research and development (R&D) and in collaboration with external innovation partners (co-creation) (11% less than the average Dutch organisation). This is a missed opportunity, as research has also shown that co-creation with specific external parties is linked to a higher degree of sports innovation.



Outcomes per sector

How do the various sports organisations score on the three indicators we employed (degree of newness, frequency, and intended impact)? Figure 1 below provides an overview for each sector.

Figure 1: Scores on shared indicators of sports innovation per selected form of sport and exercise





Explanation

This figure shows that in the selected forms of sport and exercise, comparatively less is invested in the development and/or introduction of something new (the degree of newness) than in the promotion of sport and exercise (impact). The rapid imitation of a given innovation within a given form of sport and exercise is probably an explanatory factor. At the same time, the (perceived) need to develop and/or introduce more radically new components in what sports organisations offer, may be absent or experienced as less urgent in a variety of forms of sport and exercise.



Factors influencing sports innovation



Technological factors

Investment

Sports organisations invest relatively little in research and development (R&D) and in the acquisition of sports equipment and facilities that are new for the specific form of sport and exercise. Most investment is directed towards the acquisition of new sports equipment and facilities whose usefulness is proven but which are not necessarily very new. The adoption of a demonstrably successful innovation ('best practice') seems to be preferred above the development of a fundamentally new innovation.

The availability of more freely disposable resources (time, money) is linked to a higher degree of sports innovation and to increased investment in the acquisition of sports equipment and facilities that are new to the specific area of sport and exercise. Investment in R&D and in the acquisition of innovative sports equipment and facilities lead to a higher sports innovation score.





Non-technological factors

The study also included the measurement of non-technological factors: the creative skills of staff and volunteers, transformational leadership in managers and directors, and co-creation.

In transformational leadership, managers stimulate their staff to attain the organisation's goals through identification with those goals. Staff members are motivated to get the best out of themselves and to subordinate their own interests to the organisation's collective interests. Co-creation simply refers to the degree to which an organisation collaborates with external partners in its innovation activities.

Creative skills and transformational leadership

The sports organisations we surveyed were characterised by a relatively high level of creative skills amongst staff/volunteers (+4%) and transformational leadership amongst managers or directors (+5%). In sports innovation, such non-technological factors are at least as important as technological factors. These skills and leadership style were particularly prevalent in elite sports programmes and (elite) sports events, but were also in evidence in tennis and volleyball clubs.



Co-creation

Collaboration in innovation activities can take place across a broad range of parties. In general terms the Monitor showed that sports organisations scored 11% lower on co-creation than the national average.

A certain amount of differentiation can be detected, however. Professional football organisations, elite sports programmes and (elite) sports events score higher (that is: relatively less low) on co-creation than the average sports organisation. The level of co-creation in elite sports events is notably higher. On the other hand, organised (tennis and volleyball clubs) and commercial grass-roots sports (fitness) are characterised by a relatively low level of co-creation.

Our research also showed that the sport organisations we surveyed collaborated principally with their own sportspeople/members, as well as maintaining relatively close collaborations with suppliers, sports federations, sponsors, and other comparable sports organisations.





Sports organisations engage relatively little in co-creation with other external parties such as financial institutes, consultants and/or open innovation mediators, rights holders (in the case of elite sports events) and visitors. There is also little co-creation with parties connected to the Sportinnovator centres. The Monitor has shown that a higher score on co-creation with this category of external parties is linked to a higher sports innovation score. The potential benefits are therefore being overlooked.

Sports organisations co-create only to a moderate degree with government bodies, even though such co-creation has been linked to a significant increase in sports innovation.

Compared to the average Dutch organisation, sports organisations collaborate relatively little (9% less) with knowledge institutes and research institutes. We found no significant link between collaboration with research institutes and sports innovation.



The effect of sports innovation on sports performance⁶



6 The Sports Innovation Monitor principally describes the links between sports innovation and performance measures. The study makes no claims about causality. To better determine the causal nature of these links, more research is needed that follows developments within sports organisations over a longer period.

In this report the term 'sports performance' refers to the extent of a solid financial position, outstanding sporting achievements, a positive development in the number of sportspeople, and the general performance of one sports organisation compared to others. Within the framework of performance measurements we also surveyed satisfaction levels among staff members, volunteers, and sportspeople. To generate a picture of the performance levels of sports organisations, these were compared with the performance levels of the average Dutch organisation.



Sports innovation pays

A raised level of sports innovation is linked to raised performance levels in sports organisations and to higher satisfaction levels amongst staff, volunteers, and sportspeople.



Raised performance levels

A raised level of sports innovation is linked to raised performance levels in sports organisations in terms of financial performance, sporting achievements, and the number of sportspeople. In this way sports organisations can use sports innovation to further distinguish themselves within a given sport or exercise discipline, and in so doing derive sporting and financial benefits. Depending on the specific form of sport or exercise, the financial benefits may include more prize money, more sponsorship, and the justification of higher membership fees.

More satisfied staff and sportspeople

A higher degree of sports innovation is also linked with greater levels of satisfaction among sportspeople, staff, and volunteers, not least because sports innovations can be introduced in response to their actual needs.





Sports organisation performance in perspective

The performance of sport organisations lags behind that of the average Dutch organisation (6% lower). One explanation for this is probably that in a large number of sports organisations – in contrast to the business community – profit is not the guiding principle.






General recommendations ⁷



- Secure and stimulate sports innovation in the different forms of sport and exercise.
- Stimulate sports innovations seen as new in specific sport and exercise disciplines.
- Stimulate the available resources for sport organisations – particularly elite sports programmes – for the purchase of sports equipment and facilities that are new for specific sport and exercise domains. This could include collaborations on innovation activities with financial institutes and visitors.



⁷ For the individual recommendations per sector we refer the reader to Chapter 5 in the research report.

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- Stimulate sport organisations to experiment, both independently and together with others, to acquire new knowledge and put it into practice. This applies especially to parties connected with the Sportinnovator centres, less usual external parties (other than clients, suppliers, etc.) and, to a certain extent, government bodies. The Sportinnovator centres can serve as a support infrastructure in this regard.
 - Stimulate sports clubs and other sport organisations to promote the creative skills of staff and volunteers and transformational leadership among board members and managers.

Colophon



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The full [report in Dutch](#)

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* The Amsterdam Centre for Business Innovation is a brand name and part of the Amsterdam Business School, University of Amsterdam.

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