Trends in the Netherlands 2017

Trends in the Netherlands

2017

Explanation of symbols

.	Data not available
*	Provisional figure
**	Revised provisional figure (but not definite)
X	Publication prohibited (confidential figure)
–	Nil
–	(Between two figures) inclusive
0 (0.0)	Less than half of unit concerned
empty cell	Not applicable
2016–2017	2016 to 2017 inclusive
2016/2017	Average for 2016 to 2017 inclusive
2016/’17	Crop year, financial year, school year, etc., beginning in 2016 and ending in 2017
2014/’15–2016/’17	Crop year, financial year, etc., 2013/’14 to 2015/’16 inclusive

Due to rounding, some totals may not correspond to the sum of the separate figures.

Colofon

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Contents

1. Society

Trends

The active over-65s

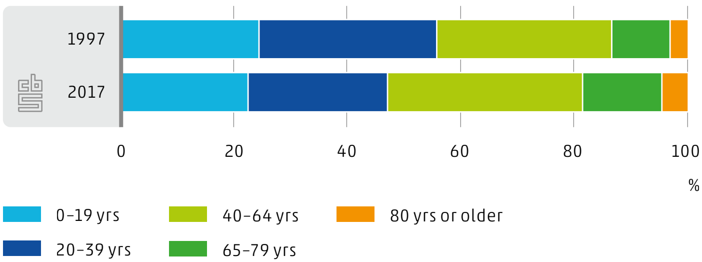
The number of over-65s in the Dutch population is growing steadily. On 1 January 2017, the population aged 65 and over stood at 3.2 million, an increase of over 1 million over two decades. This sharp increase is linked to the post-war baby boom, which lasted until 1955. Virtually all these baby boomers have now passed the age of 65. Today's over-65s are relatively healthy and fit, live longer than previous generations, and take on an active rolexin society.

Over a span of two decades, the population of over-65s rose from 2.1 to 3.2 million (+50 percent). In the same period, the overall population grew relatively slowly by 10 percent. In 1997 the share of over-65s in the Dutch population was just over 13 percent, versus 18 percent in 2017. Women constitute the vast majority of his age group, as they did 20 years ago. The gap is narrowing, however, as male life expectancy is increasing as well. Similar to 1997, the average age among over-65s is slightly over 74 years.

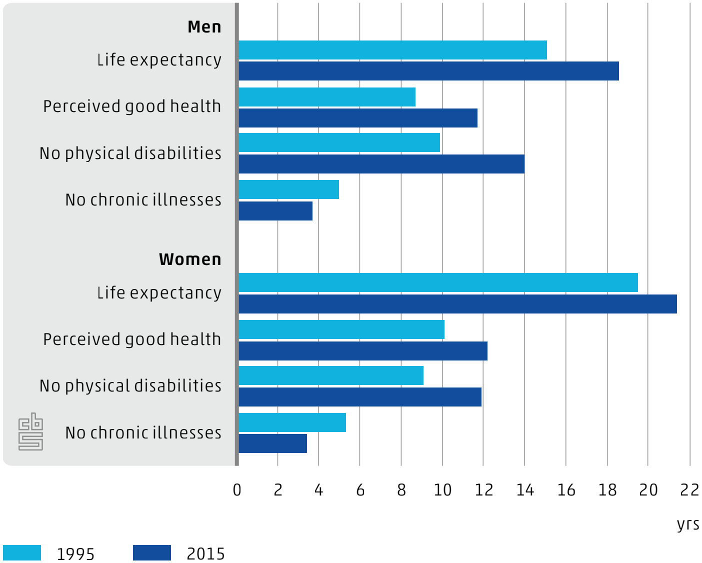
Healthy old age more likely

Both male and female life expectancy continue to rise. In 2015, a 65-year-old male had a remaining life expectancy of just under 19 years, while a 65-year-old female could expect to live over 21 more years. Two decades ago, average life expectancy at 65 was still 15 years for men and over 19 years for women. The life expectancy gender gap is closing, but women do still live longer than men.
The smaller difference is linked to the more equal shares of men and women who smoke.
Not only can over-65s expect to live longer, they will do so in perceived good health. Men in particular are more likely to achieve a healthy old age, gaining three healthy life years on average, whereas women have gained only two. Life expectancy without physical disabilities has increased even more than life expectancy in perceived good health.

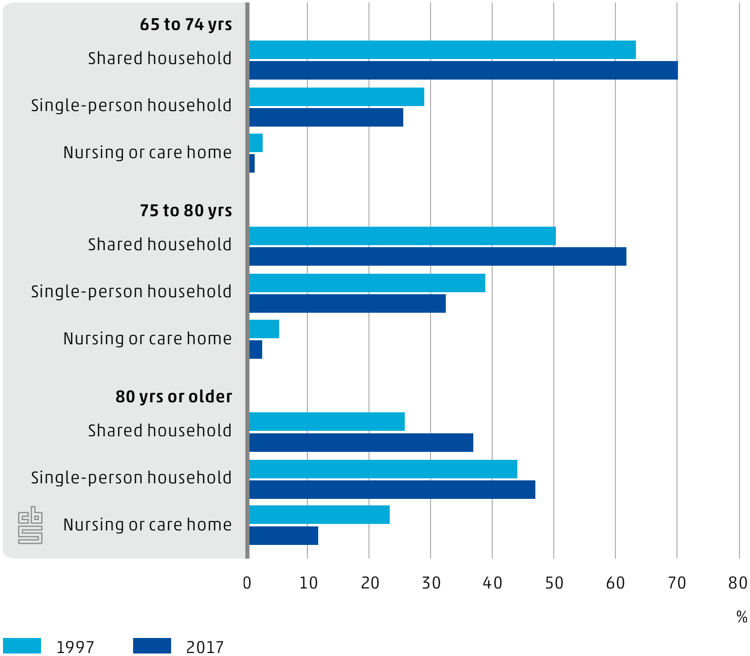
1.1 Age composition of the Dutch population



1.2 Life expectancy after age 65



1.3 Living situation of elderly people



On the other hand, both men and women at age 65 have seen a slight decline in their disease-free life expectancy. There are several possible explanations for this. Screening programmes have improved and are taking place at a younger age, which has led to greater and earlier awareness of any health conditions. At the same time, progress in terms of treatments increases the lifespan of people who suffer from chronic disorders. Certain disorders, such as diabetes, are also more common nowadays than they were twenty years ago. In 2016, the chronically ill over-65s mostly reported suffering from high blood pressure or joint wear.

Living independently for longer

People not only live longer, they also stay independent for longer without moving into a nursing or care home. At the beginning of this century, 81 percent of the over-75s lived on their own; this share has increased to 88 percent in 2017. Over 617 thousand over-75s live in a shared household while 530 thousand are on their own. Relatively few elderly under

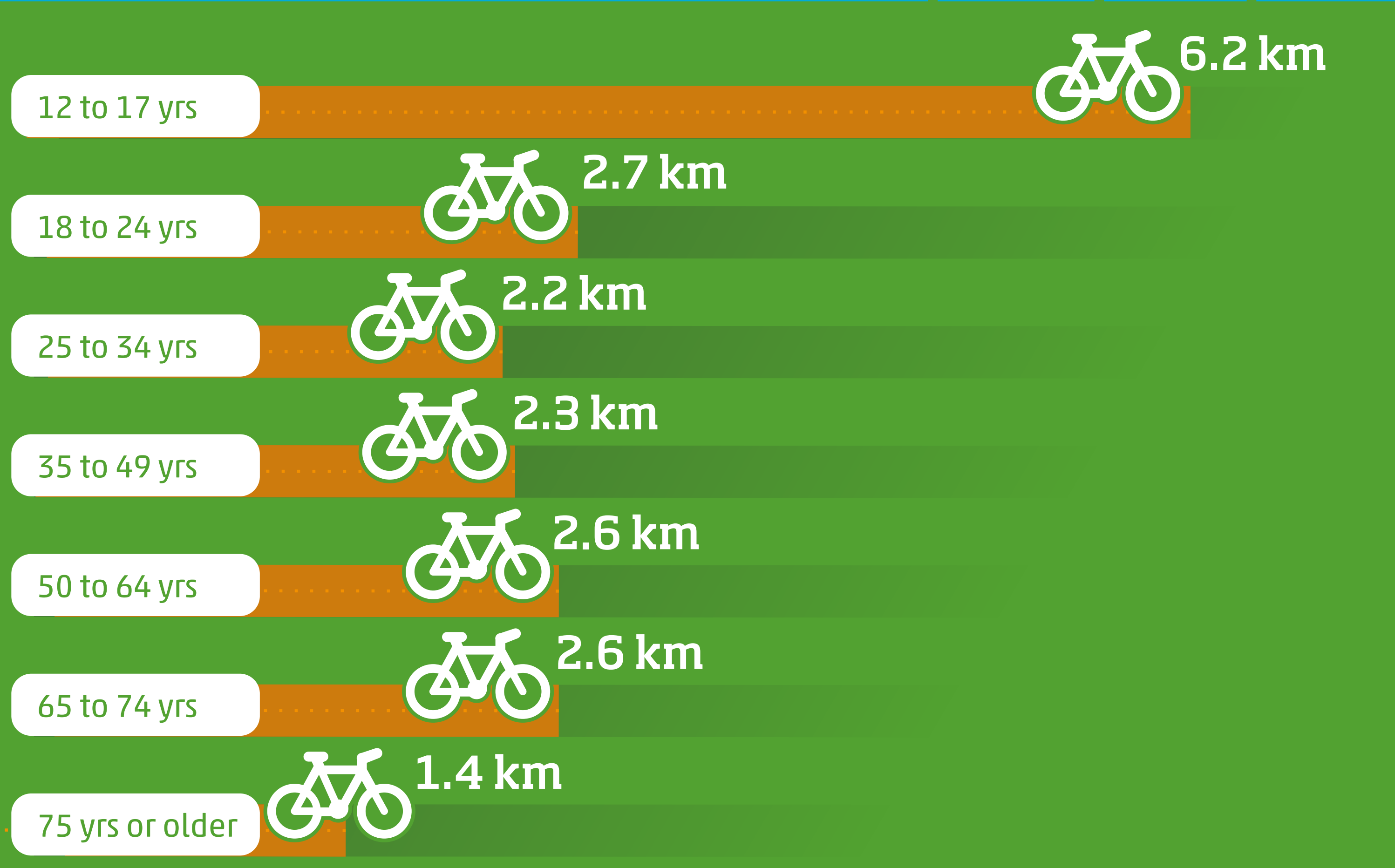
80 live in a nursing or care home. But even over 80, fewer live in homes, a trend which has existed for several years. In 1997, 23 percent of the over-80s lived in nursing and care homes; this share was less than 12 percent by 2017, a decline which is seen among younger age groups as well.

Another increase among the over-65s is seen in home ownership. During the late 1990s, about one in three elderly were home owners; this share rose to 45 percent in 2008 and by 2015, around half of all over-65s owned a house. Six out of ten baby boomers are home owners, as against four out of ten over-75s.

Over 65 and exercising

Today's over-65s often like to exercise. In 2016, nearly 16 percent of people aged 65 to 75 owned a membership at a fitness centre, swimming pool or other sports provider, while over 15 percent were members of a sports club. In comparison: 20 percent in the total Dutch population aged 4 or older had a sports membership and over 24 percent joined a sports club. One in four over-75s and over four in ten 65 to74 year-olds still take up exercise once weekly. People in the latter age bracket are also most likely to comply with the Dutch Healthy Activity Standard (well over 77 percent).
The over-65s are also keen cyclists: people between 65 and 75 cycle an average distance of 2.6 kilometres a day. Only teenagers and young adults (up to age 25) cycle more on a daily basis.

Average cycling distance per person per day, 2015

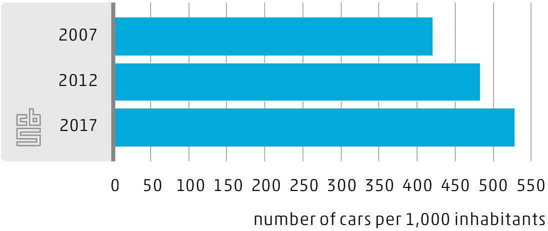


More grey on the road

At the beginning of 2017, nearly 1.7 million cars in the Netherlands were owned by people aged 65 or over. This is 675 thousand more cars than ten years ago. Of all new cars which have entered the Dutch market over the past decade, nearly 68 percent have been registered by people aged 65 or over. This rapid growth is not just due to more over-65s, but also to more car ownership. The ratio of car ownership among over-65s has increased: from 420 per one thousand people at the beginning of 2007 to 528 per one thousand ten years later.

In other words, car ownership and car use have become much more common among the over-65s, especially among women. However, car owners are still most likely men: in this age group, three-quarters of men own a car versus one-quarter of women. Which colour is most popular amoung over-65s? The answer is: grey.

1.4 Car ownership among over-65s



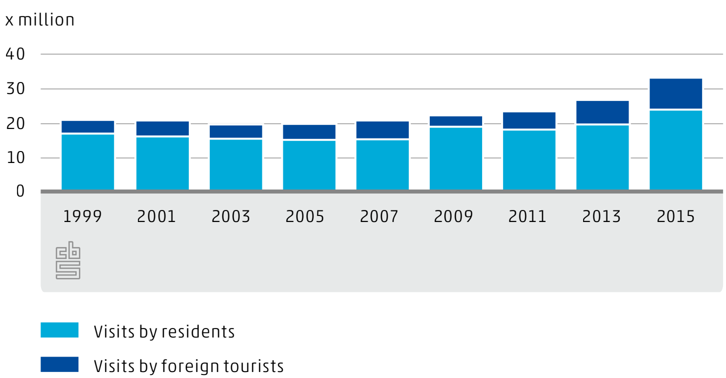
Figures

Culture

In 2015, government subsidies were the main source of income for Dutch museums. The share of subsidies did go down considerably in the span of a decade: in 2005, nearly two-thirds of revenues consisted of subsidies, versus 42 percent in 2015. Museums have become more and more dependent on revenues from entrance tickets, museum shops and cafés and restaurants, as well as on donations and charity.

Due to the economic crisis that started at the end of 2008, fewer foreign tourists visited the Netherlands. The number of foreign museum visitors increased again gradually after 2009 to 28 percent in the total number of visits by 2015. This increase goes hand in hand with growing numbers of foreign tourist arrivals. Large museums in particular have benefited from this growth.

1.5 Visits to Dutch museums



Source: CBS, RCE, Dutch Museum Association.

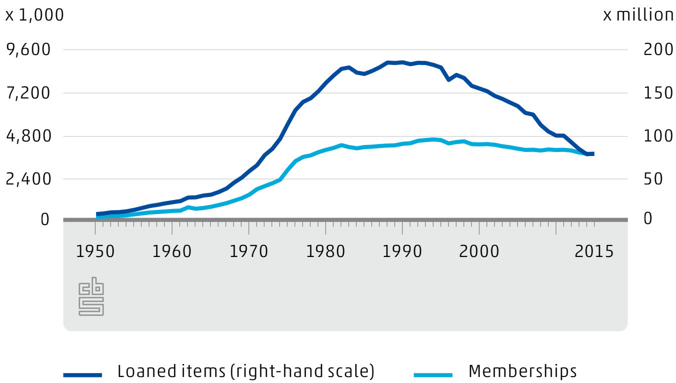
Museum revenues, 2015

Source: CBS, RCE, Museumvereniging.

1.6 Revenues at Dutch theatre and music venues

Source: CBS, VSCD, VNPF.

1.7 Memberships and loaned items at public libraries

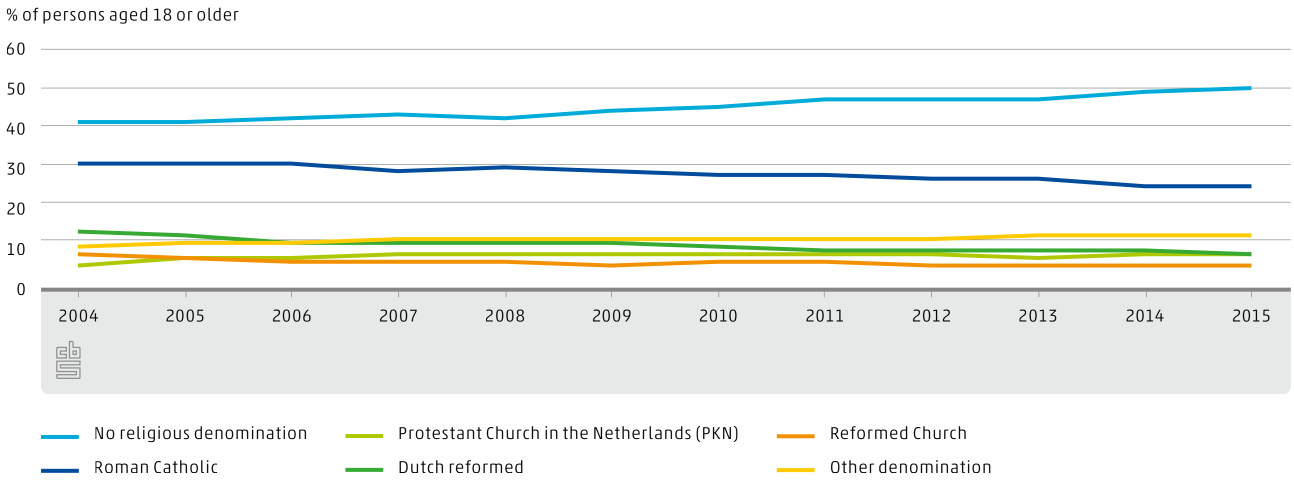


Source: CBS, VOB, KB.

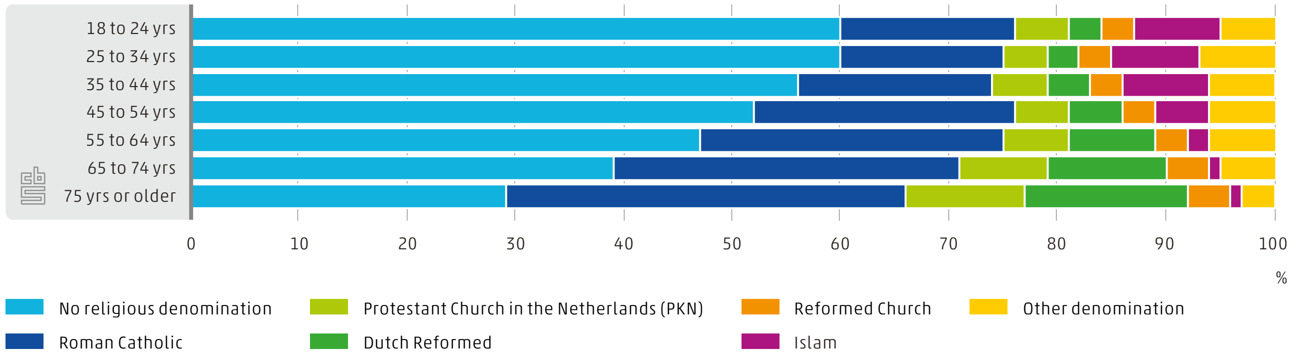
Performing arts attendance was up by 6 percent in 2015 relative to 2012. In the same period, audience revenues at the 337 venues were up accordingly: in 2015, revenues generated by entrance fees, cloakroom charges and merchandising were 13 percent higher than in 2012.

In 2015, there were 156 public libraries with a membership base of around 3.8 million, including 61 percent young people. Libraries have adopted a wider range of services in recent years beyond the lending of books.

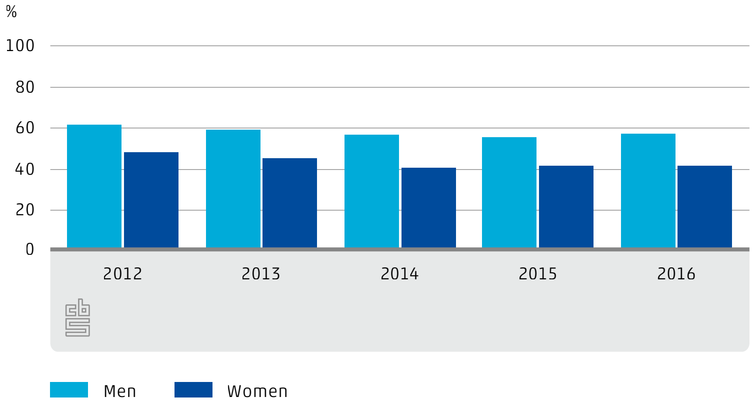
1.8 Religious denomination



1.9 Religious denomination, 2015



1.10 Political interest



In 2015, for instance, around 81.5 thousand activities were organised in the areas of functional illiteracy and education.

The share of adults belonging to a religious denomination has diminished over the years. In 2004, 59 percent of the adult population belonged to a religious group; this share had halved by 2015.

Young people are much less inclined than elderly to consider themselves members of a religious group. In 2015, six in ten young people indicated they are not religious, against three out of ten over-75s. The most commonly stated religion is the Roman Catholic faith.

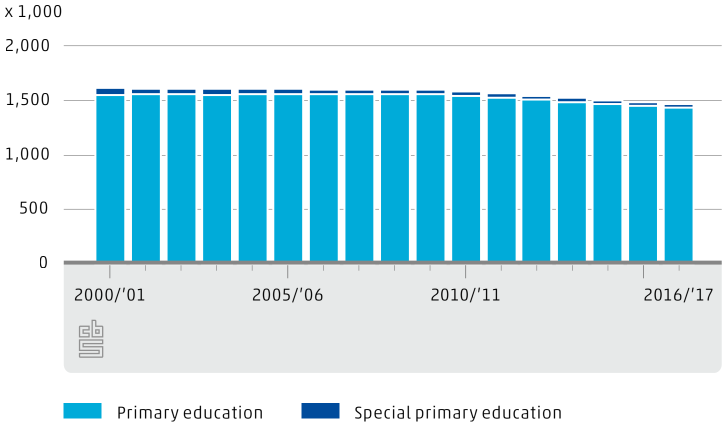
Men are more interested in politics than women: in 2016, 57 percent of men showed an interest in politics against 42 percent of women. Political interest has dropped slightly since 2012 among both sexes.

Education

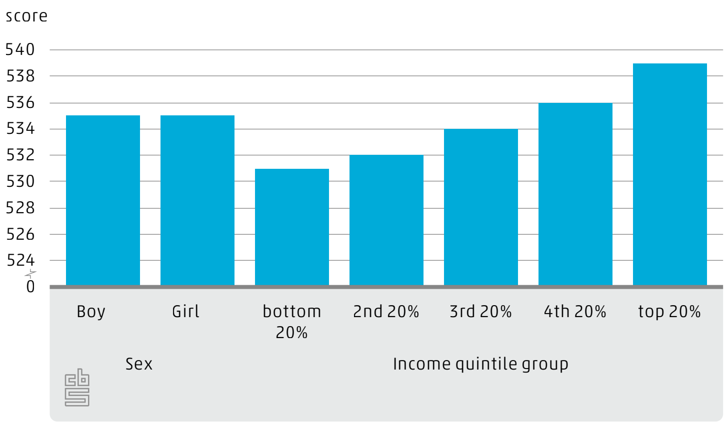
The number of (special) primary school pupils has been declining since the academic year 2008/'09. This trend is expected to continue in the coming years based on population forecasts by Statistics Netherlands. In the academic year 2016/'17, there were slightly over 1.5 million primary school pupils in the Netherlands, a decline of more than 8 percent relative to 2008/'09.

In the 2016 End of Primary School Test, boys achieved the same average score as girls. Students from the top high income families scored on average 8 more points than those from families with the lowest parental income.

1.11 Number of students in (special) primary education

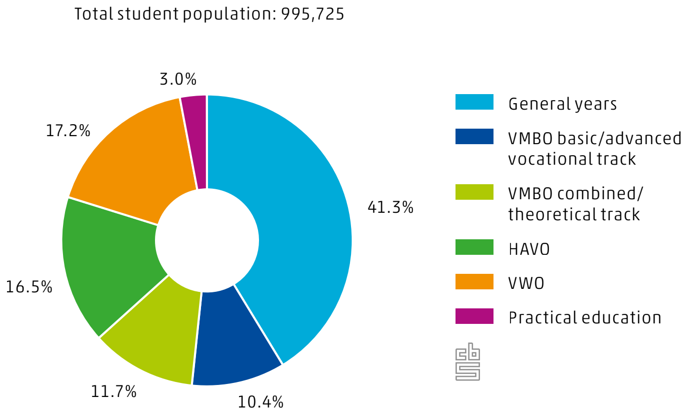


1.12 Scores at End of Primary School Test, 2016



Source: Cito, CBS.

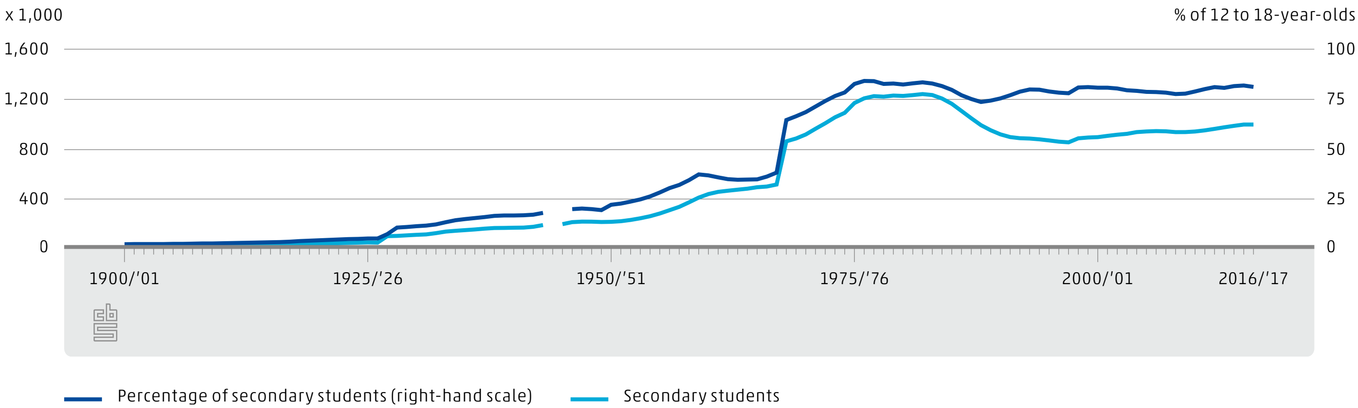
1.13 Secondary school enrolment ratios



Secondary school enrolment has increased slightly over the past few years to almost 1 million in school year 2016/’17. Over 40 percent of these students are in their first or second year or in a third general year. Around one-third are enrolled in third-year HAVO or VWO and up, while over 20 percent are enrolled in the third or 4th (final) year of VMBO. Another 3 percent of secondary school students are in practical education.

Over the course of the 20th century, a gradual shift took place at secondary schools from elite to mass education. The main reasons for the

1.14 Secondary school enrolment, 1900-2016

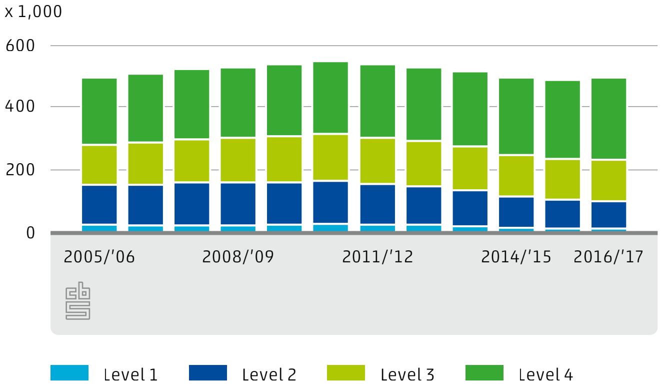


growing numbers of students are the expansion of compulsory education, the introduction of a new law on secondary education (the 'Mammoth Act' of 1968) and an increase in the population cohort aged 12 to 18 years.

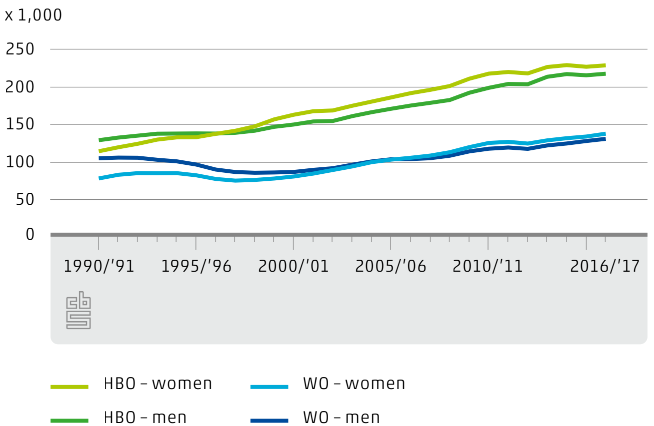
Student numbers in upper secondary vocational education (MBO) rose until 2010/'11 and subsequently declined year-on-year, but a new upward trend occurred in 2016/'17. The number of Level 4 MBO students has seen a continuous rise, reaching 53 percent in 2016/'17. The student population at all other levels, notably Level 2, has declined in recent years.

Higher education enrolments stood at slightly over 714 thousand in the academic year 2016/'17. Two decades ago, this was still only 440 thousand. Since 1997/'98, higher professional (HBO) students have included more women than men; this trend was followed in 2007/'08 by university (WO) students.

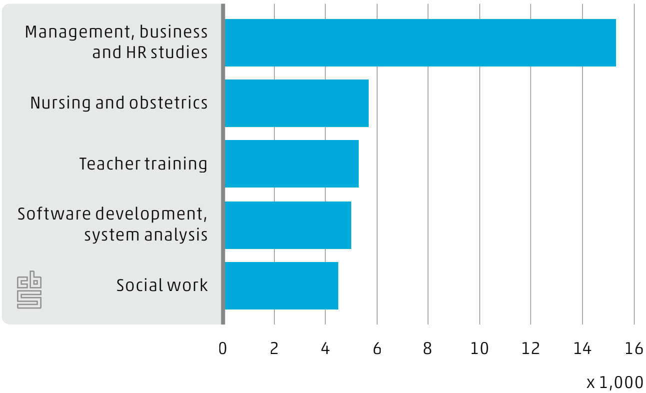
1.15 Enrolment in senior secondary vocational training (MBO)



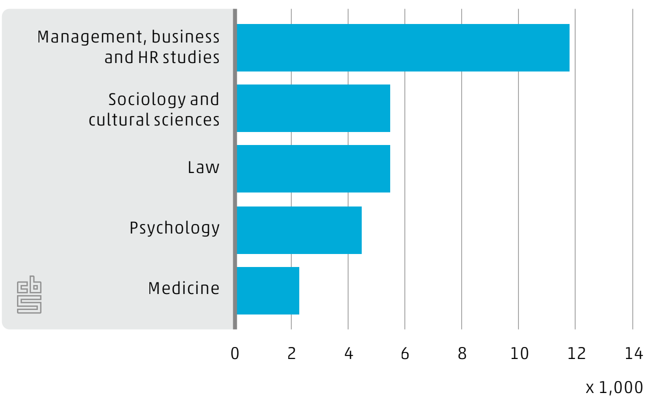
1.16 Higher education enrolment



1.17 Top 5 studies among first-year HBO students, 2016/'17



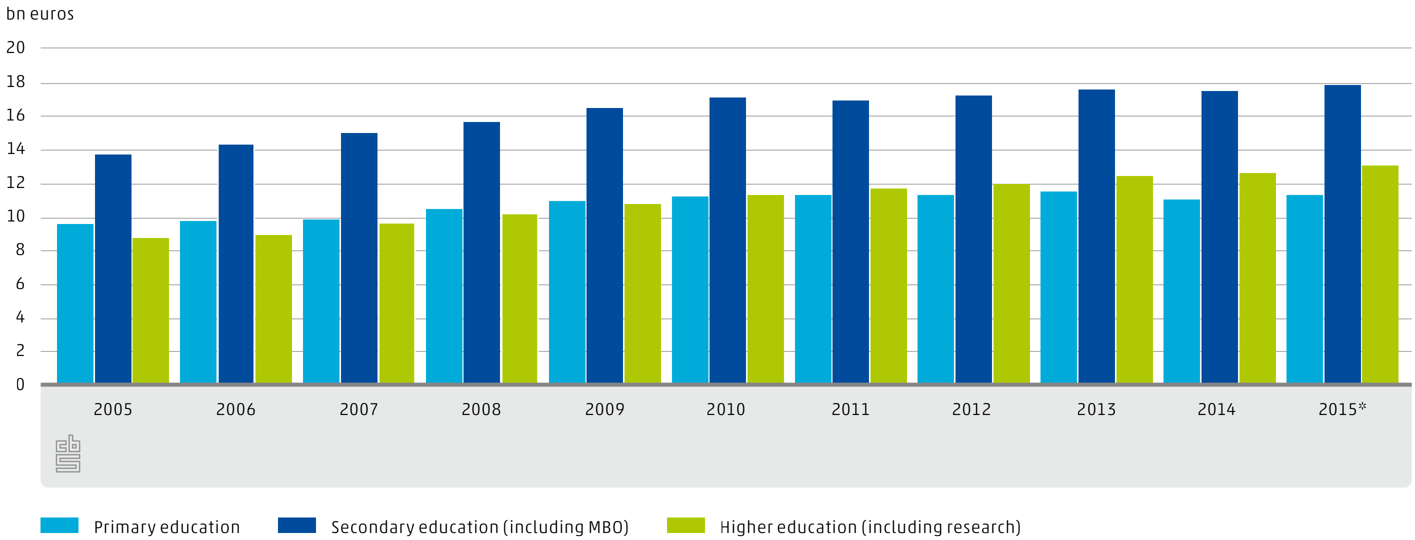
1.18 Top 5 courses, first-year university (WO) students



Among first-year HBO students in 2016/'17, more than 15 thousand had chosen management, business or human resource studies. Close to 6 thousand students took nurse or midwifery training, almost all female (90 percent). By contrast, software development and system analysis drew almost exclusively male students: 93 percent of the 5 thousand first-year students.

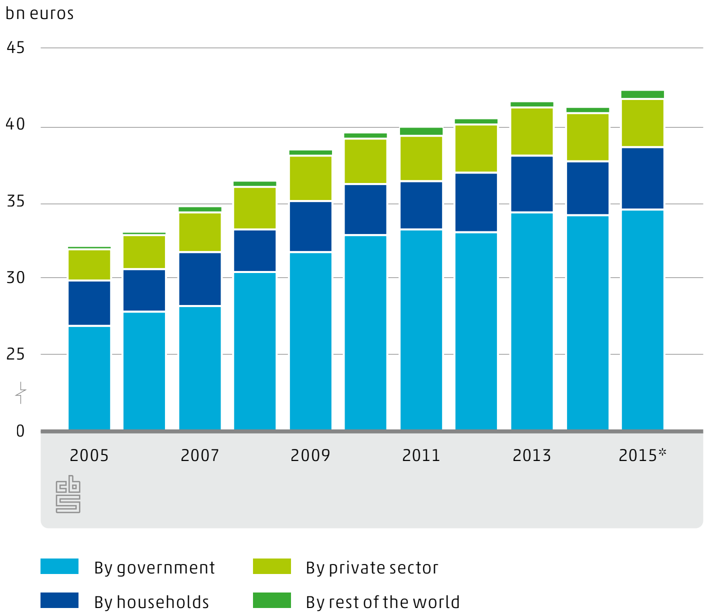
At universities, many students who enrolled in 2016/'17 had chosen management, business and human resource studies; altogether nearly 12 thousand. Of the more than 2 thousand first-year medical students, 7 out of 10 were female.

1.19 Education expenditure

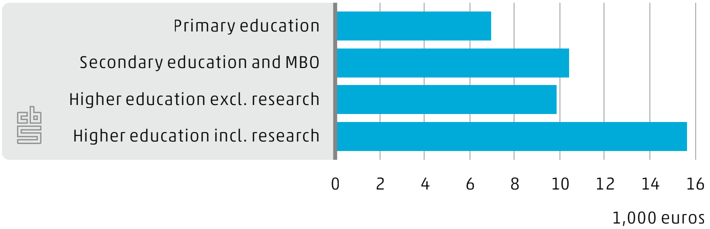


The Netherlands' rise in education spending has mainly been focused on higher education. Since 2010, more has been spent on higher education than on primary education. Higher education spending went up from 8.8 billion euros in 2005 to 13.1 billion euros in 2015.

1.20 Education expenditure



1.21 Expenditure at educational institutions, per student, 2015*



Over a ten-year period, education (including research) expenditure increased by 32 percent to 42.3 billion euros in 2015. In the same period, public expenditure increased by 7.6 billion euros. Households and businesses spent more on education as well by 1.3 and 1.1 billion euros respectively.

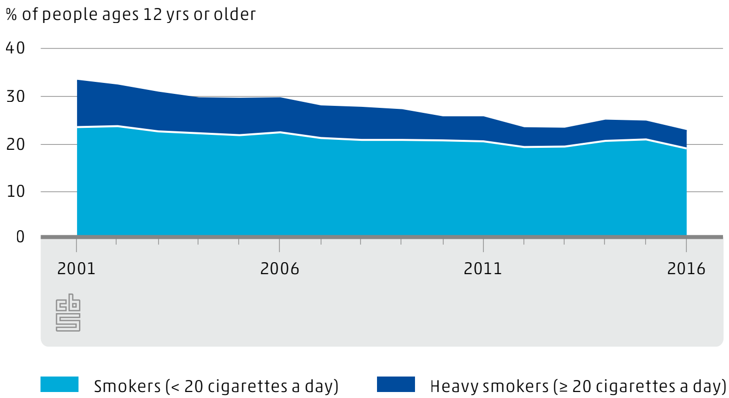
In 2015, all higher educational institutions combined received 11.8 billion euros towards education and research. This is equivalent to an amount of 15 thousand euros per student.
In higher education (not including research), spending reached almost 10 thousand euros per student. Spending was lowest on primary education at 7 thousand euros per pupil.

Health and care

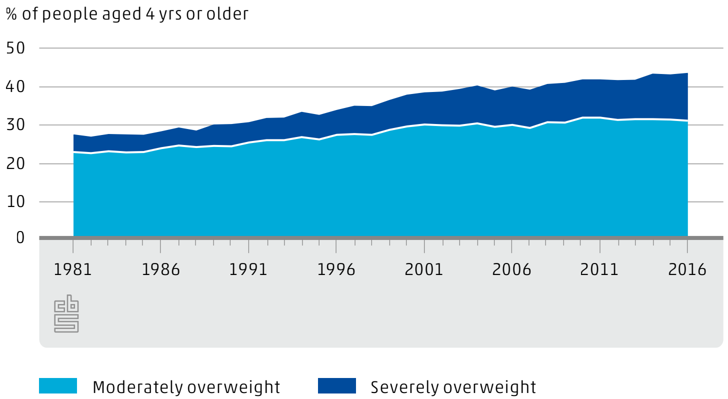
Eight percent of the Dutch population aged 12 years or older are excessive drinkers. This means that men consume more than 21 glasses and women more than 14 glasses of alcohol per week. Men are regarded as heavy drinkers when they have 6 or more alcoholic drinks on one day; 4 or more glasses for women. Young people in their twenties are relatively the largest group of excessive or heavy drinkers. Excessive drinking is seen relatively more often than heavy drinking among people aged 55 and over.

1.22 Heavy and excessive drinkers, 2016

1.23 Smokers



1.24 Obesity rates

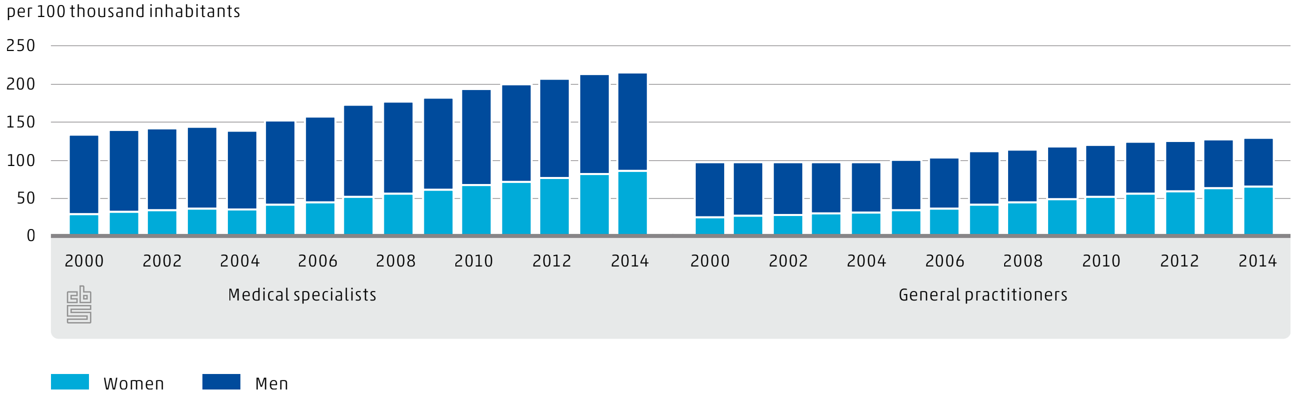


Smoking rates among the population aged 12 years or older have declined steadily for years. In 2016, tobacco consumption was down by more than 19 percent on 15 years previously. The percentage of heavy smokers, i.e. people who smoke more than 20 cigarettes per day, has fallen as well, by over 62 percent since 2001.

More and more Dutch people are moderately to severely overweight. The percentage share of severely overweight (obese) people has doubled since 1995. In 1986, 28 percent of the Dutch population aged 4 years and over were overweight; this had become 43 percent 30 years later.

Overweight is measured on the basis of the Body Mass Index (BMI). Adults with a BMI between 25 and 30 kg/m^2 are moderately overweight, while a BMI of 30 km/m^2 or higher indicates obesity.

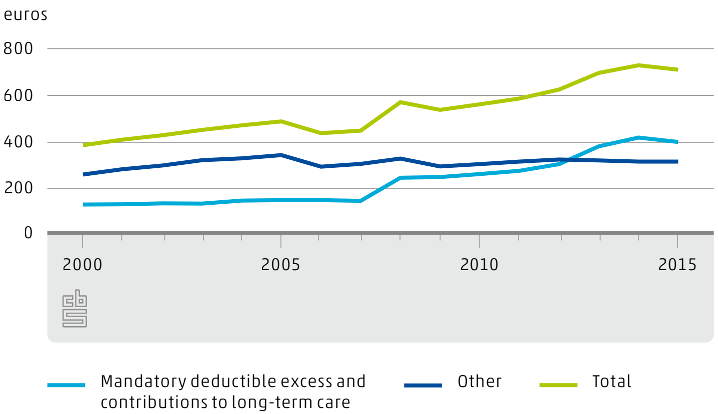
1.25 Number of medical specialists and GPs



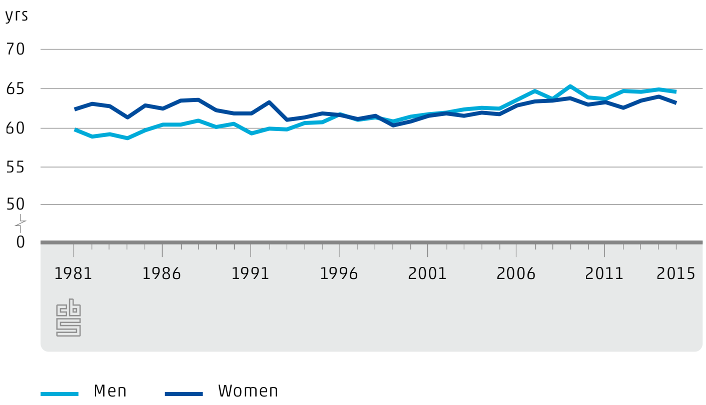
The number of medical specialists and general practitioners per 100 thousand inhabitants has increased by 61 percent and 34 percent respectively. There are mainly more female doctors. Nowadays, 40 percent of medical specialists and 50 percent of GPs are women.

The average personal expenditure on health, care and welfare was slightly lower in 2015 than in 2014. The general trend is upward, in line with the increase in total care expenditure. Personal spending includes amounts paid for care actually provided and is excluding health

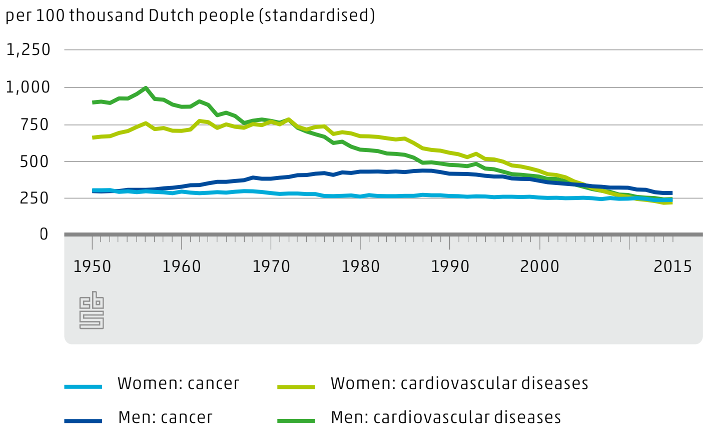
1.26 Personal expenditure on care



1.27 Life expectancy in good self-perceived health



1.28 Mortality due to cardiovascular diseases and cancer



care insurance premiums. The average amount spent is now 80 percent higher than 15 years ago. Deductible excess, which was introduced in 2008, and long-term care contributions have gone up in particular.
Other personal care expenditure, for example on dental care or over-the-counter medicines, is around 300 euros on an annual basis.

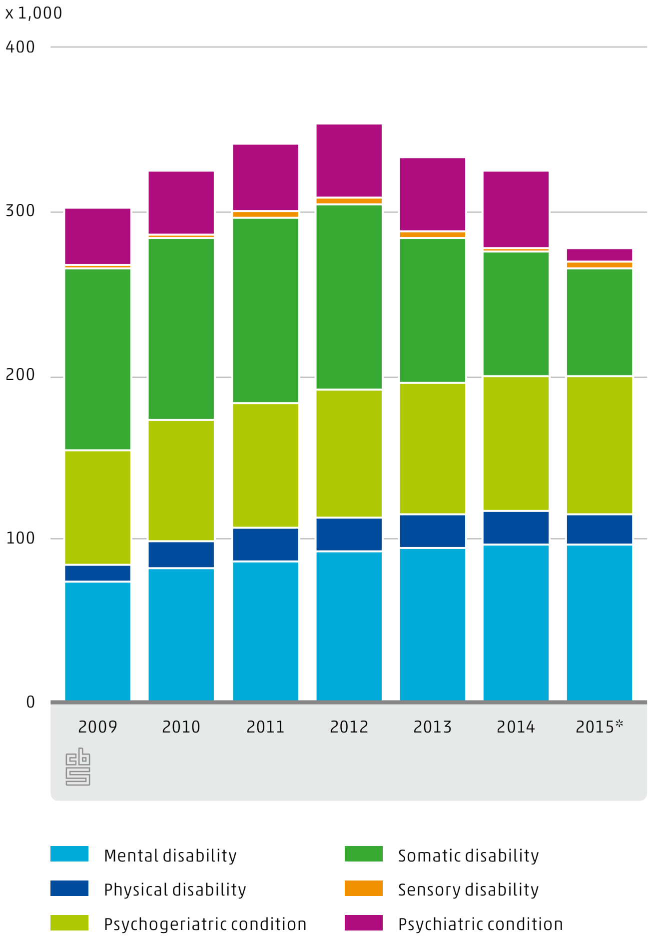
Healthy life expectancy means the average number of years that a person is expected to live in good self-perceived health, assuming that future health and mortality risks remain unchanged. Over a span of 35 years, the average healthy life expectancy among men has increased markedly: from 60 years around 1980 to 65 years in 2015. Among women, healthy life expectancy fluctuates around 62 years.

In the period 1970–2015, mortality due to cardiovascular diseases declined among both men and women. This mortality rate – calculated per 100 thousand inhabitants and taking into account the population structure in 2015 – declined earlier among women than men, but ended up as very similar between the two

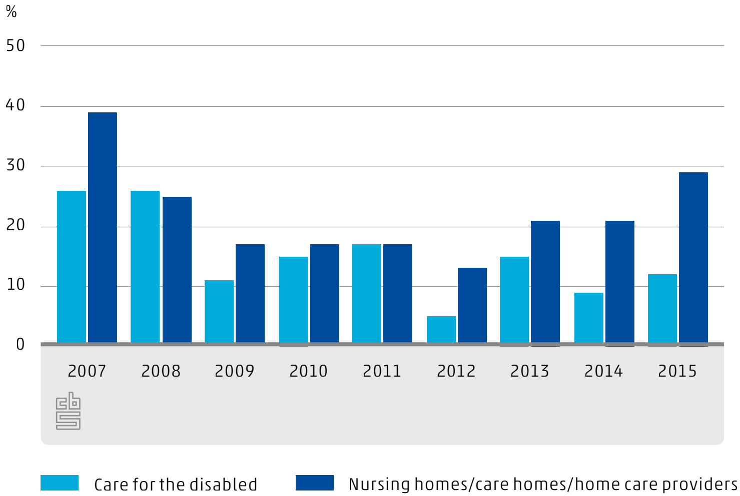
sexes. Based on the same calculation method, the cancer death rate among men has dropped by more than one-third over the past three decades.
This is partly due to a decline in lung and stomach cancer deaths. Cancer mortality among women shows a gradual decline over the entire period 1970–2015, but this has slowed in recent years due to more lung cancer deaths.

In recent years, increasingly fewer people have become eligible for residential long-term care. Before 2015, long-term care was available under the General Act on Exceptional Medical Expenses (AWBZ) and the Social Support Act (Wmo). As a result of the 2015 long-term care reform, this care has been transferred to the Long-Term Care Act (Wlz), the Social Support Act 2015, the Health Care Insurance Act and the Youth Act. Residential psychiatric care now falls largely under the Health Care Insurance Act.

1.29 Eligibility for residential AWBZ/Wlz care



1.30 Percentage of loss-making care institutions



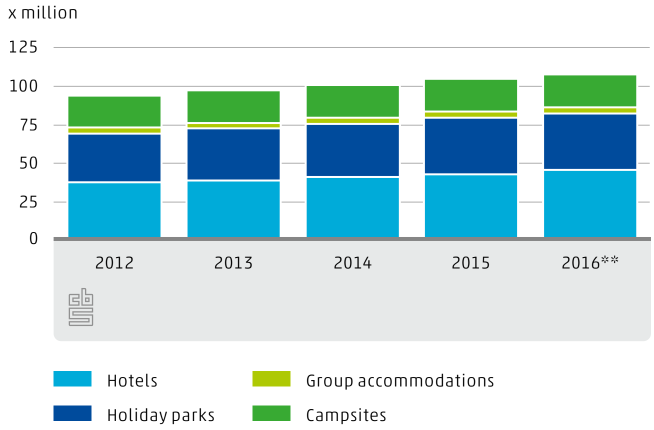
The share of VVT institutions (nursing homes, care homes and home care providers) that suffered turnover losses rose from 21 percent in 2014 to 29 percent in 2015. Of the institutions caring for the disabled, 12 percent faced a loss in 2015, versus 9 percent in 2014.

Leisure

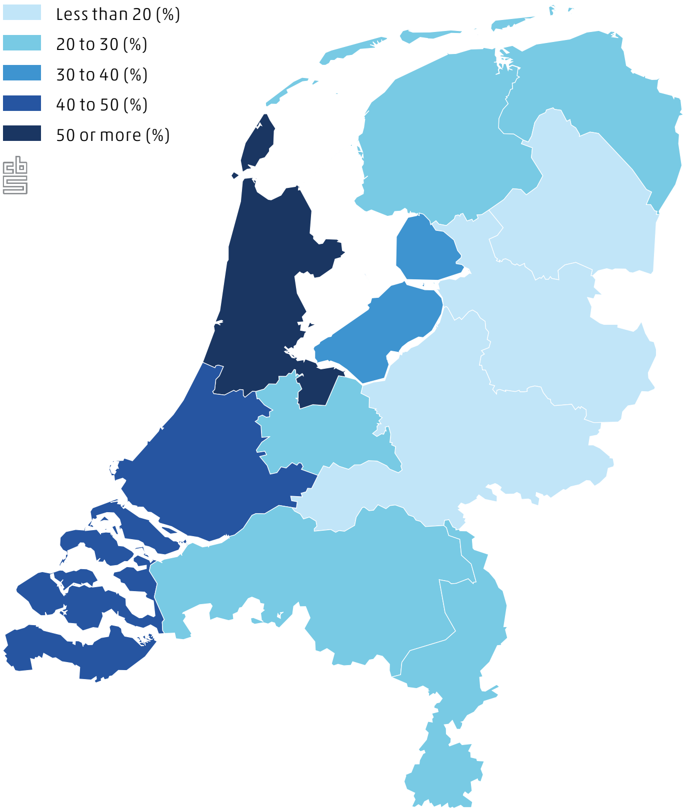
The number of overnight stays at hotels, hostels and bed and breakfast accommodations has gone up in recent years; the same applies to holiday parks. Camping as a recreational activity has become less popular in the Netherlands, however. The number of campsites has also declined in recent years, while the number of beds at hotels and holiday homes has risen.

Of all overnight stays in the Netherlands in 2016, 63 percent are on account of Dutch guests.
In the province of Noord-Holland, it is just the other way round: foreign guests there occupy a share of 65 percent. Noord-Holland is also the province with the highest number of overnight stays.
These are mainly hotel stays in Amsterdam. Amsterdam had 14 million overnight stays in 2016.

1.31 Overnight stays in the Netherlands, by type of accommodation

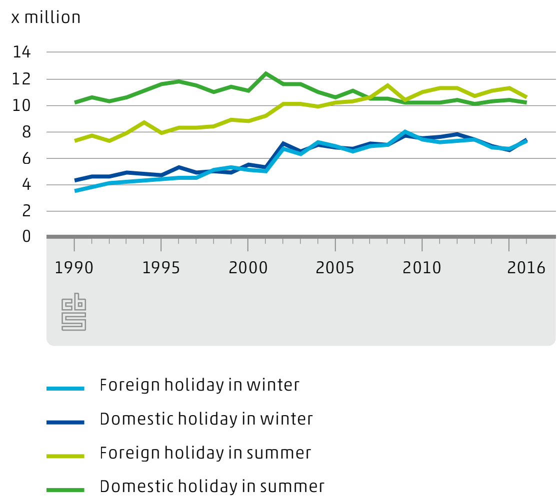


1.32 Overnight stays by foreign guests in Dutch tourist accommodation, 2016



The Dutch tend to go on holiday during summer (May through September) rather than winter season (October through April), although the number of winter holidays has increased: from 8.8 million in 1992 to 14.7 million in 2016. Winter holidays spent within the Netherlands have grown more popular at the same rate as holidays outside of the country. The number of holidays spent abroad during summer has increased from 7.3 million in 1992 to over 10.6 million in 2016.

1.33 Holiday trips

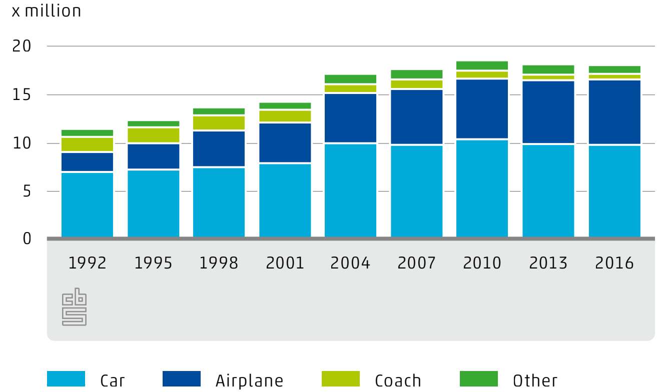


There is no significant increase in the number of domestic summer holidays, in spite of a brief rise around 2000: just as in 1992, the total was slightly over 10 million in 2016 with a peak in 2001 of more than 12 million holidays.

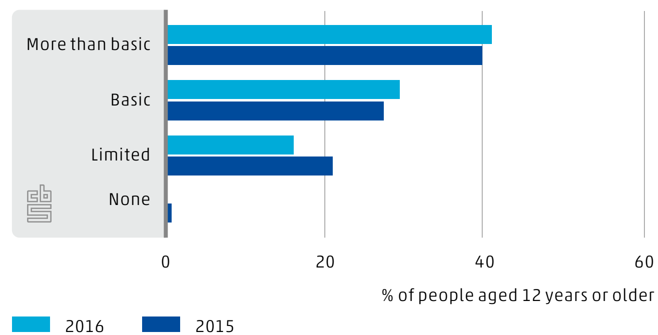
Over the past 25 years, Dutch holidaymakers have taken more and more trips abroad. Foreign holidays stood at 11.4 million in 1992 but reached almost 18.0 million in 2016. The most popular mode of transport is the car. Car holidays abroad rose by nearly 3 million to a total of 9.7 million in 2016. Holidays by air more than tripled over this period, from 2.1 million in 1992 to 6.8 million trips in 2016.

More and more Dutch people have at least basic computer and internet skills. A large group even possess more than the basic skills in ICT. The percentage of Dutch people with low or no skills has decreased in 2016 relative to 2015. Here, percentages refer to the share of respondents who said they had used the Internet in the three months before the survey. This explains why they do not add up to 100: not everyone went online in these three months.

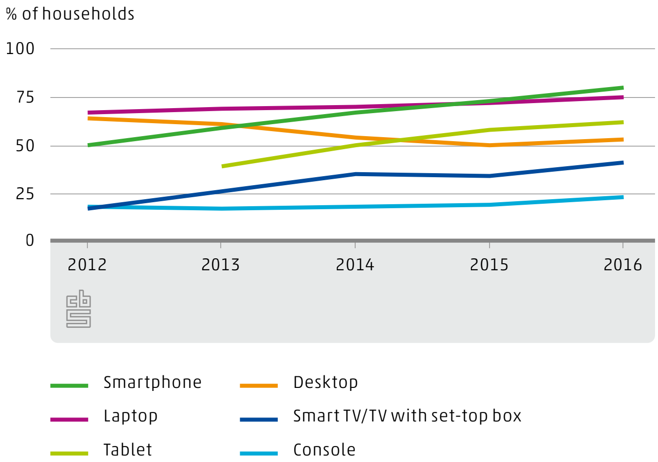
1.34 Mode of transport in foreign holidays



1.35 ICT skills



1.36 Internet devices at home

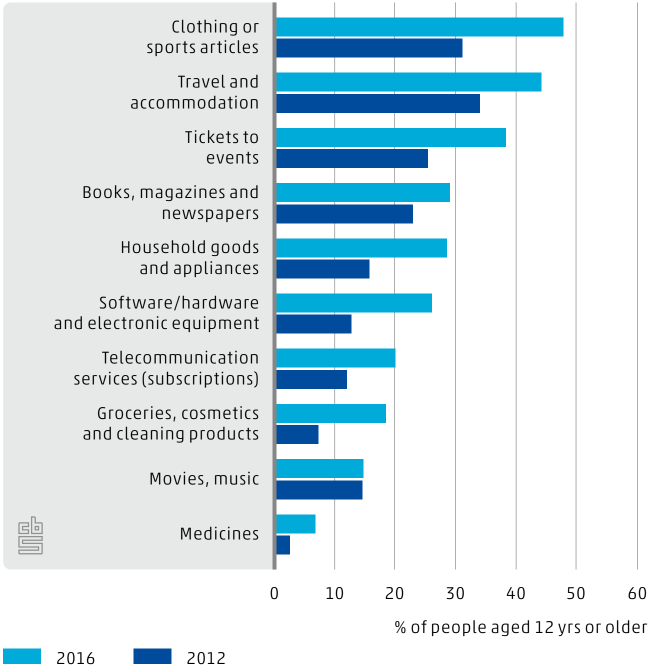


Smartphones and laptops were the most frequently used internet devices used by households in 2016. Eight in ten households have one or more smartphones and three-quarters have a laptop. Especially smart-phones have gained a lot of ground in recent years: in 2012, only 50 percent of households possessed one or more smartphones.

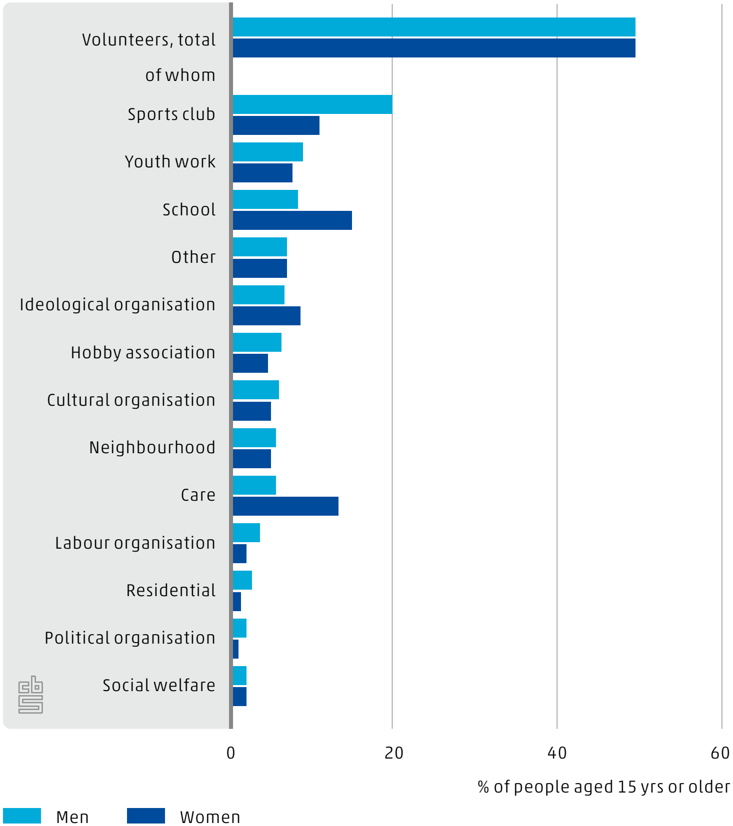
In 2016, 73 percent of the Dutch population aged 12 or older had ever made a purchase online. This is 9 percentage points more than in 2012. As in previous years, the most frequently made purchases included sports equipment, travel and holiday packages as well as tickets to events.

About half of the Dutch population aged 15 years or older engaged in volunteer work last year, including both men and women. They do, however, prefer different types of organisations: men most often volunteer for a sports club while women are more often involved in school or care activities.

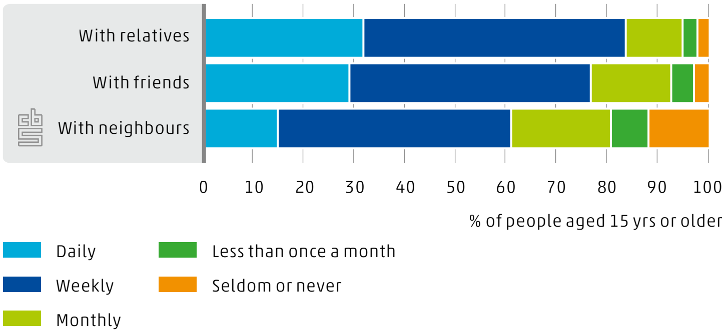
1.37 Online purchases



1.38 Volunteering, 2016



1.39 Social contacts, 2016



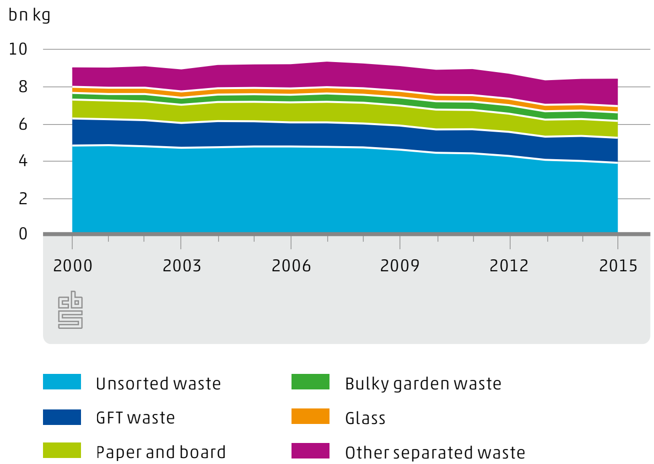
Over three out of ten Dutch people aged 15 or older have daily contact with relatives who do not live with them. A more or less equally large group are in daily contact with friends. Fifteen percent see neighbours on a daily basis, but 12 percent seldom or never talk to their neighbours. The level of social contact has hardly changed over the past few years.

Nature and environment

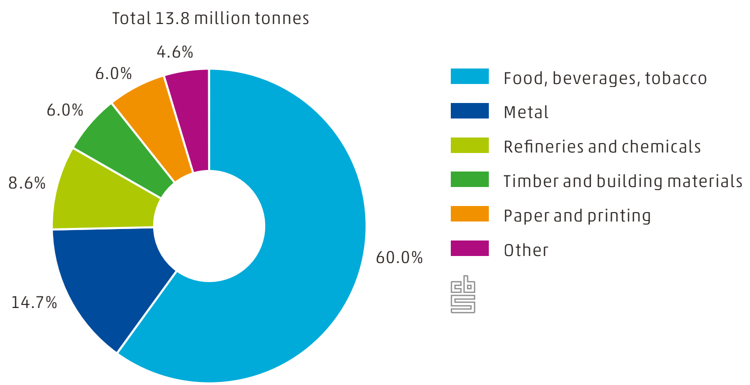
The total volume of household waste increased slightly between 2000 and 2007 and subsequently declined. In 2015, the volume of collected household waste was 8.4 million tonnes, equivalent to 496 kg per inhabitant and 10 percent less than in 2007. Over 53 percent was separately collected waste, up from 46 percent in 2000.

The Dutch manufacturing industry produces around 14 million tonnes of non-hazardous waste per year. In 2015, the volume stood at 13.8 million tonnes, 1 percent more than in 2014 but 4 percent less than in 2010. Nearly all the waste generated (96 percent) is being recycled or used for the production of animal feed. Sixty percent of the waste originates from the food, beverages and tobacco industry.

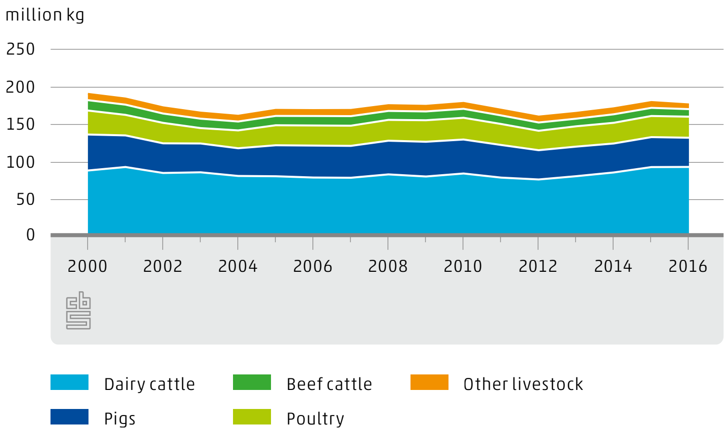
1.40 Volume of household waste collected



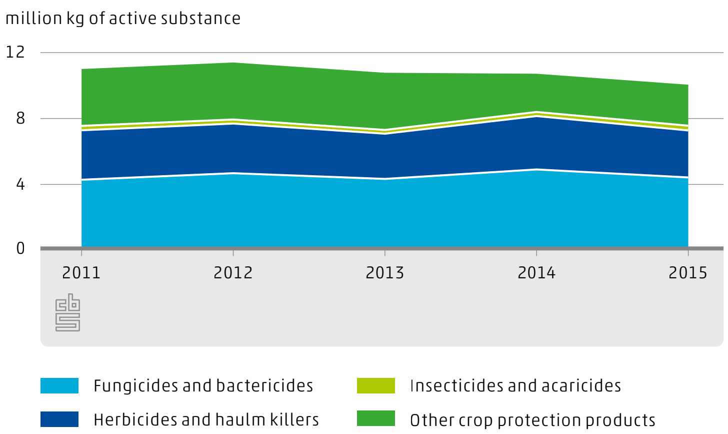
1.41 Non-hazardous waste in the manufacturing industry, 2015



1.42 Phosphate production from livestock manure



1.43 Chemical pesticide sales



Nearly 60 percent of the Dutch livestock sector's phosphate production originates from beef cattle manure. Phosphate levels have risen since 2013 due to the growing size of dairy herds after milk quotas were abolished. Phosphate production fell again by 2 percent in 2016, mainly as a result of a reduced phosphate content in roughage.

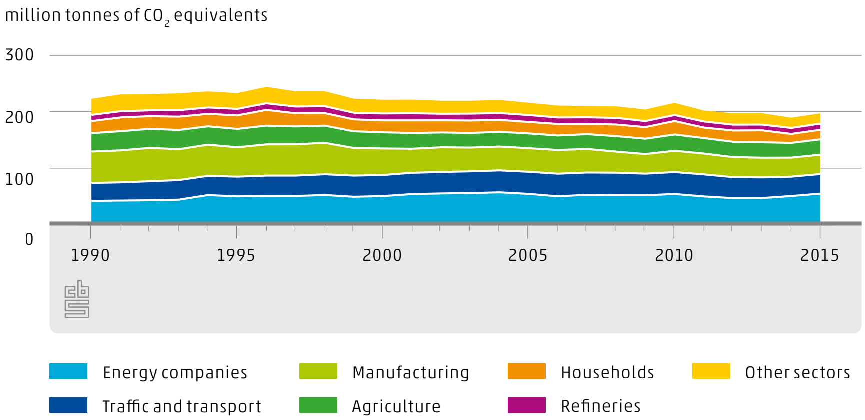
In 2015, Dutch farmers bought 10 million kg of chemical crop protection products. Sales fluctuated depending on pests and diseases as well as the weather conditions during the growing season.

Greenhouse gas emissions rose by 4 percent year-on-year in 2015, an increase of 7.7 million tonnes of CO2 equivalents. Emission levels were 12 percent below the level of 1990. The target set by the Paris climate agreement, which the Dutch government has signed, is to achieve 25 percent lower emissions by 2020 relative to 1990.

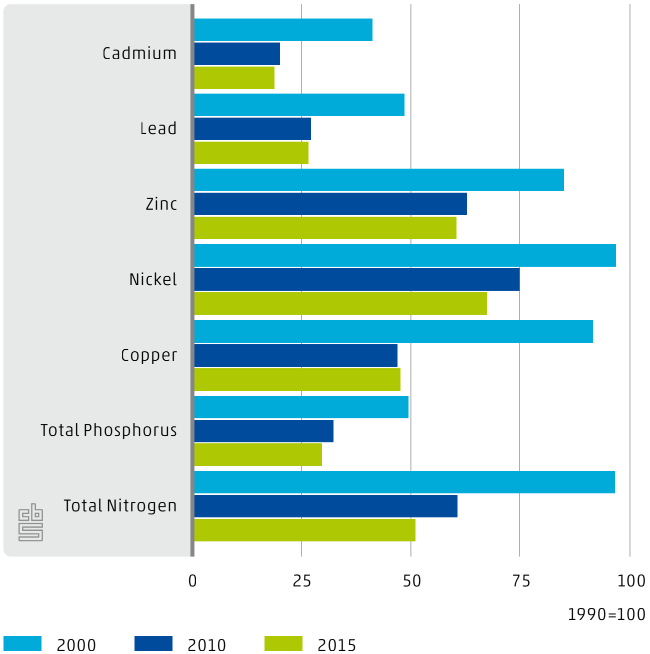
Contamination of surface water due to nutrient and heavy metal runoff has declined signficantly. This is the result of a range of measures taken between 1990 and 2010 which were very effective. The total contamination load has declined further since then, but only slowly. The figures presented here only include emissions to inland waterways, i.e. the contamination load entering the North Sea is not included.

In 2015, Dutch companies in the sectors mining and quarrying, manufacturing and energy invested slightly under 2.1 bn euros in environmental provisions. The energy sector in particular invested strongly. The majority of investments made over the past decade have been towards limiting or preventing air pollution.

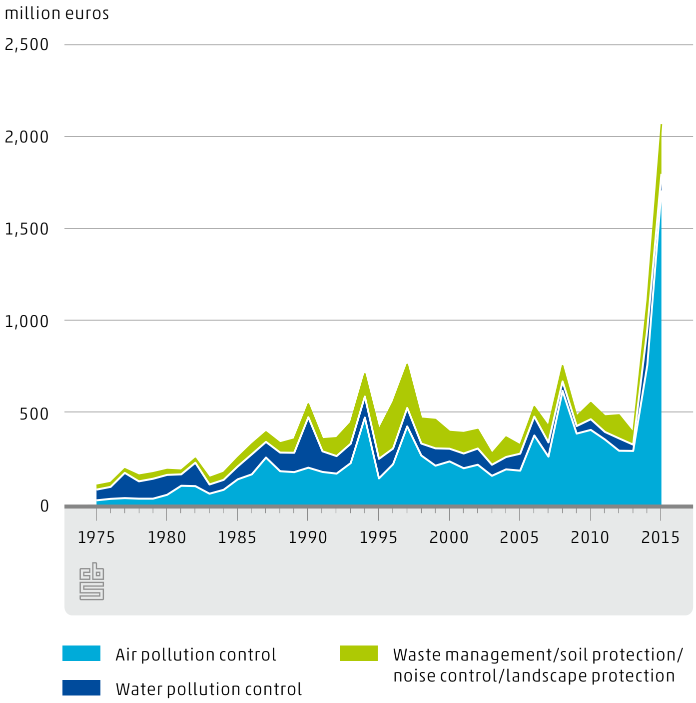
1.44 Greenhouse gas emissions (according to IPCC)



1.45 Emissions into surface water

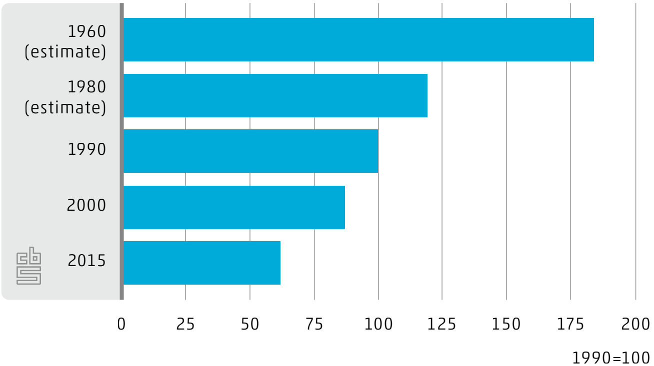


1.46 Environmental protection investments in the private sector

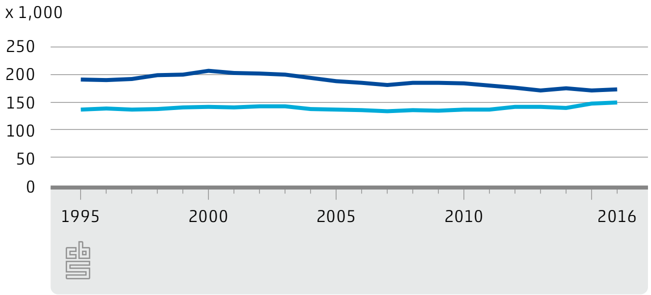


The farmland bird indicator shows a 60 to 70 percent decline in the breeding bird population on Dutch farmland since 1960. The number of breeding pairs fell from an estimated 4 million in 1960 to slightly over 1.5 million in 2015. Some species have become practically extinct in large parts of the Netherlands. An estimated 750 thousand to 1.1 million breeding pairs of the skylark population have disappeared since 1960. Furthermore, partridges (–93 percent), turtle doves (–92 percent), tree sparrows (–93 percent) and black-tailed godwits (–68 percent) have all become a rare sight.

1.47 Farmland bird population

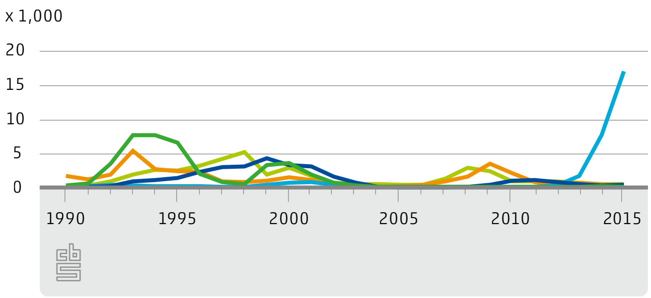


1.48 Births and deaths



Live births
Deaths

1.49 Immigration of asylum migrants



Syria
Iraq
Somalia
Afghanistan
Former Yugoslavia

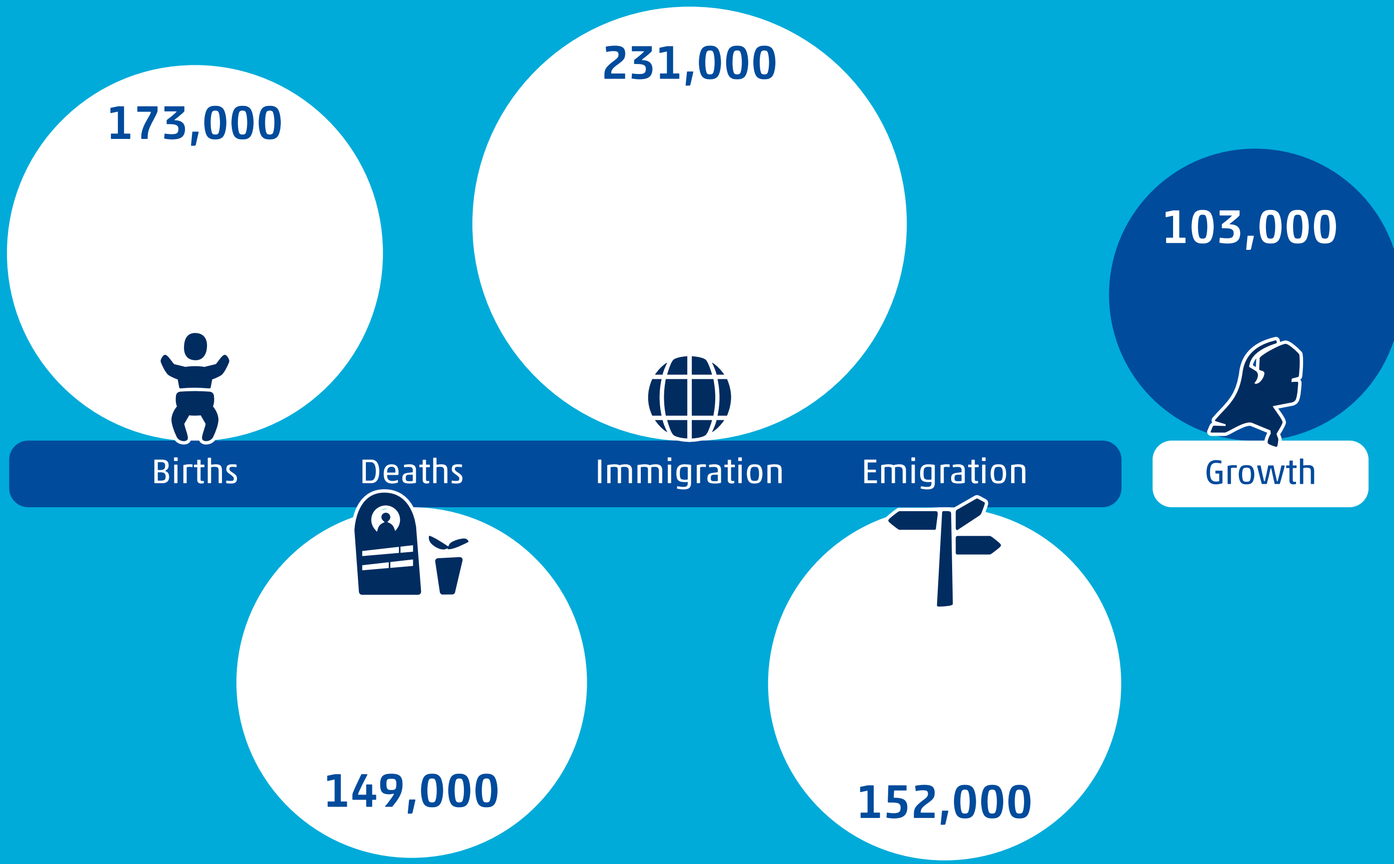
Population

On 1 January 2017, the Netherlands had close to 17.1 million inhabitants, over 100 thousand more than one year previously. This growth was mainly due to migration. On balance (immigrants minus emigrants), 79 thousand migrants settled in our country. Natural population growth (births minus deaths) contributed 24 thousand more to the population.

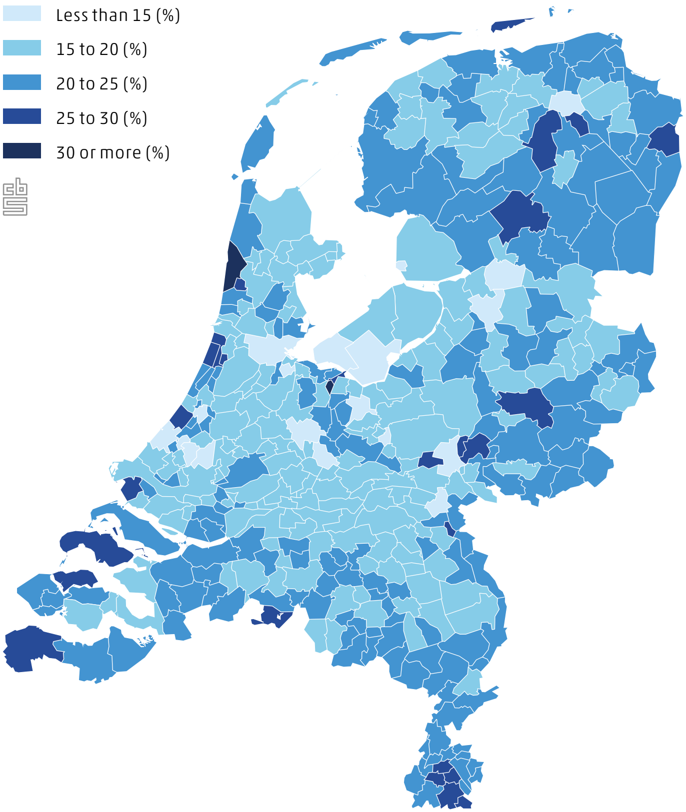
Around the turn of the century, the annual number of births exceeded 200 thousand. It has declined since then, fluctuating between 170 and 175 thousand in recent years. The number of deaths peaked in 2015 and 2016 at an annual rate of almost 150 thousand.
Natural population growth has more than halved over the past two decades.

Global conflicts have sparked a number of sharp increases in the flow of asylum seekers to the Netherlands. In 2015, there was a peak in the number of Syrian and Eritrean asylum migrants.

Population dynamics, 2016



1.50 Population aged 65 and over, 1 January 2016



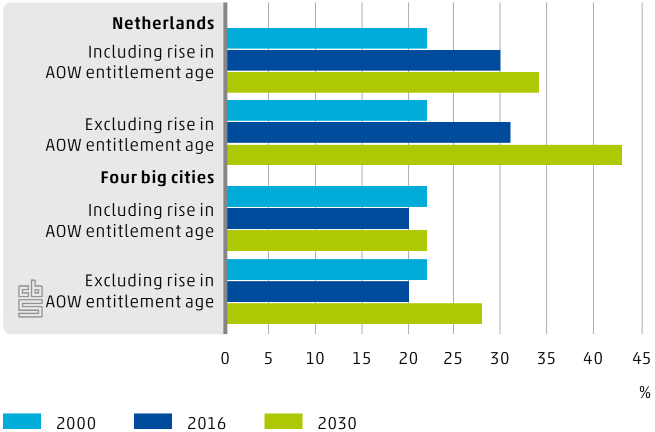
The first decade of this century saw a relatively modest influx of asylum seekers, mainly from Iraq. Many Yugoslavs arrived during the 1990s, followed by Afghans around the turn of the century.

The Netherlands has an ageing population. In 2016, 18.2 percent of the population were 65 years or older, up from 13.6 percent at the turn of the century. The share of over-65s is much lower in big cities than in smaller municipalities. Among the four major cities, Rotterdam has the highest share of over-65s at 15.1 percent while Utrecht has the lowest share at 10.2 percent. Urban areas remain relatively young due to the continuous influx of young people, who often stay after finding a partner and starting a family. By contrast, there is an outflow of young people from the smaller municipalities, particularly in regions outside of the Randstad conurbation.

Large municipalities are younger than smaller ones and will be in the future. As the AOW entitlement age is being raised, grey population pressure (ratio of people who have reached AOW entitlement age to the population aged 20 up to AOW entitlement age) will increase more slowly in the future.

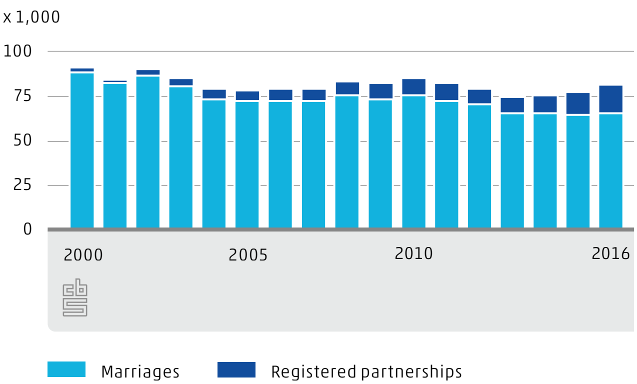
As of 2013, more people are entering into a marriage or registered partnership again after falling marriage rates in previous years. The number of registered partnerships has risen in particular over the past few years, while the number of marriages has remained stable. Nowadays, nearly one in five registered relationships are partnerships; in comparison, only one in thirty registered relationships were partnerships in the year 2000.

1.51 Old-age dependency ratio ('grey pressure')

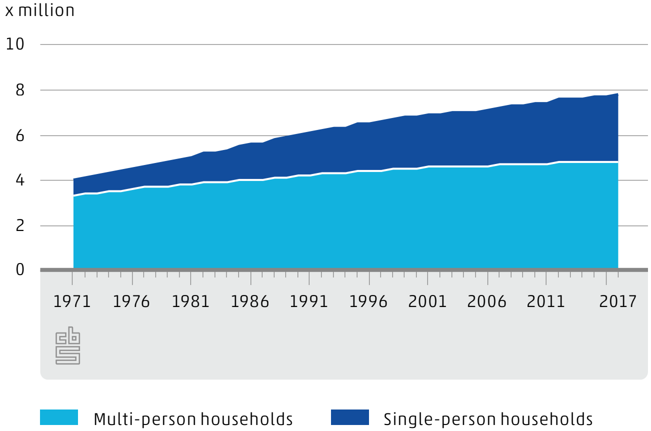


Source: CBS, PBL.

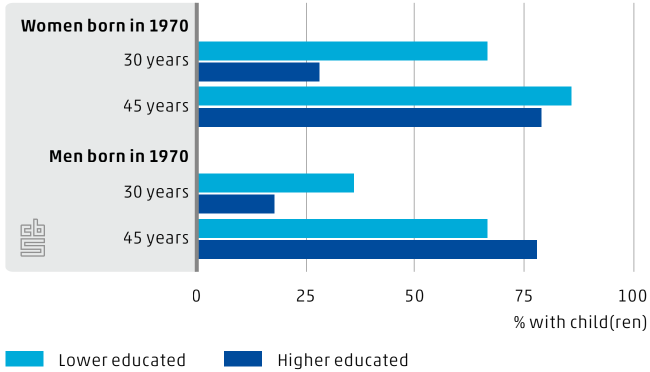
1.52 Marriages and registered partnerships



1.53 Households, 1 January



1.54 Parents by age and education



The number of single-person households has quadrupled since 1971 and stood at nearly 3 million on 1 January 2017. The number of multi-person households has also increased, but to a far lesser extent. The number of single-person household grew most rapidly over the 1980s: by 600 thousand. Growth was relatively at its strongest during the 1970s and ’80s. Nowadays, nearly 40 percent of all private households consist of a single person.

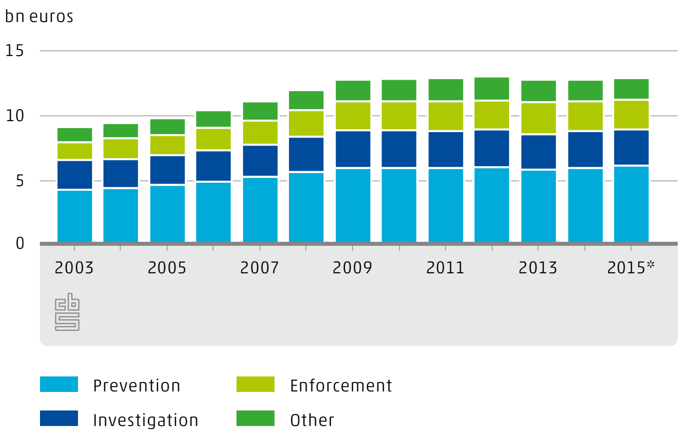
Slightly less than 20 percent of higher educated men born in 1970 have children by the age of 30. This share is significantly higher among lower educated men (over one-third), but men with higher education levels do catch up at a later age. By the age of 45, highly educated men born in 1970 are much more likely to have children than lower educated men. As for women born in 1970, those with lower education remain more likely to have children than highly skilled women, even at a later age.

Security and justice

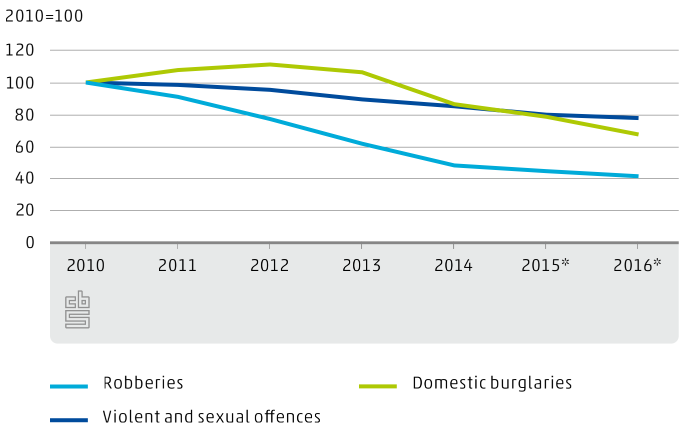
Almost half of the total expenditure on public security went to prevention in the period 2005–2015. This was mainly for the deployment of police and private security services. In 2015, over 2.8 billion euros was spent on investigation activities and 2.3 billion euros on enforcement of criminal penalties.

In recent years, more police resources have been focused on combating so-called High Impact Crimes: violent and sexual offences, domestic burglary and robberies, i.e. serious offences with a major impact on victims. The High Impact Crime rate has declined: since 2010, the number of robberies has dropped by nearly 60 percent, domestic burglaries have dropped by almost one-third and violent and sexual offences by 22 percent.

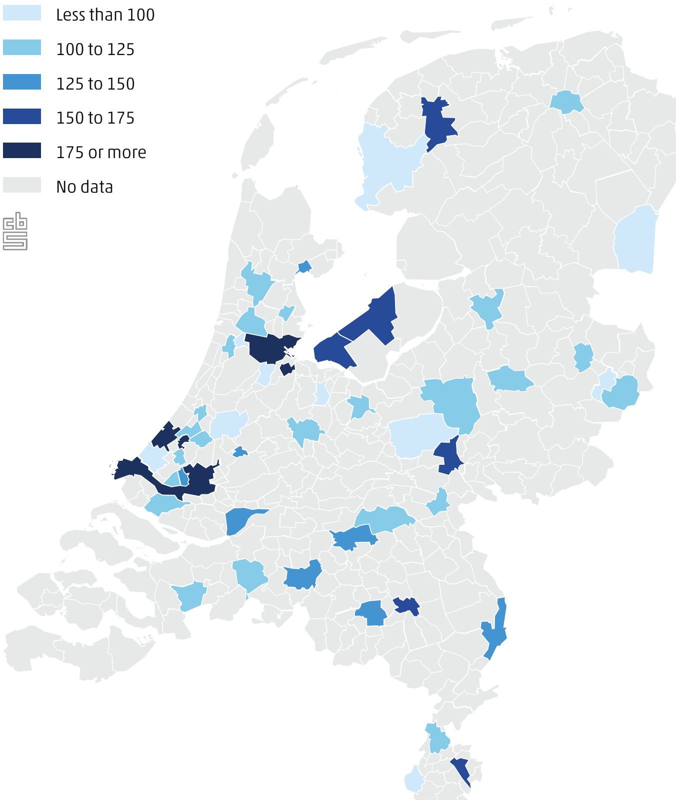
1.55 Expenditure on public security



1.56 High impact crimes



1.57 Registered crime suspects per 10 thousand inhabitants inmunicipalities with over 70 thousand inhabitants, 2016



In 2016, The Hague had a crime suspect rate of 206 per 10 thousand inhabitants, the highest rate of all Dutch municipalities. Amsterdam and Rotterdam also have relatively high crime suspect rates. Utrecht has a far lower rate at 119 suspects per 10 thousand inhabitants. Up in the northern provinces, the city of Leeuwarden has relatively many registered crime suspects.

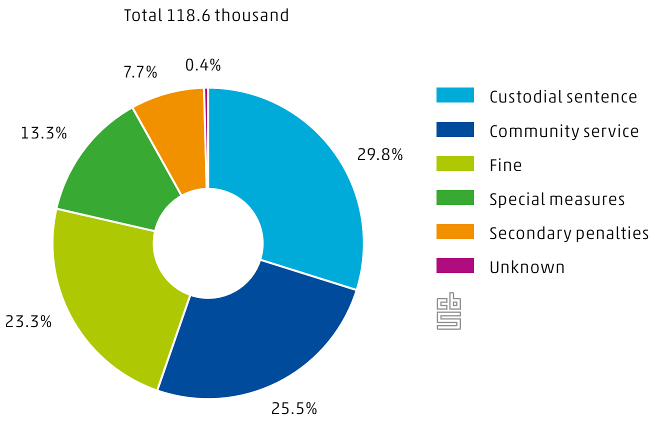
In 2015, 88.8 thousand people were found guilty of a criminal offence by a court of first instance. The majority of crime convictions were for property, violent and sexual offences.

In the same year, Dutch courts imposed 118.6 thousand sanctions for criminal offences. The most common sanction was imprisonment, followed by community service and fines. In recent years, the share of prison sentences has risen from 23 percent in 2007 to 30 percent in 2015.

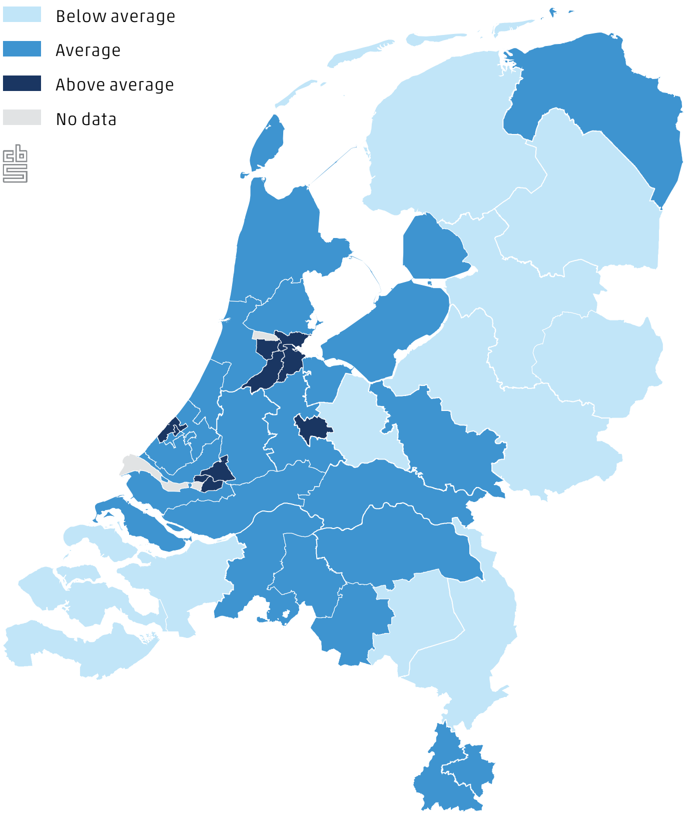
1.58 Convictions by courts of first instance

	2011	2012	2013	2014	2015
	x 1,000				
Total convictions	94.4	88.7	89.0	85.9	88.8
Penal Code	65.8	62.1	61.7	59.5	59.0
of which					
property offences	32.8	31.1	32.1	31.0	30.5
vandalism and public order offences	10.8	10.0	9.3	8.9	8.6
violent and sexual offences	18.9	18.3	17.9	17.6	17.6
Traffic offences	15.2	15.1	16.1	14.7	16.5
Drugs-related offences	6.7	6.7	6.9	7.2	7.7
Other offences	6.7	4.9	4.3	4.4	5.6

1.59 Criminal penalties by courts of first instance, 2015



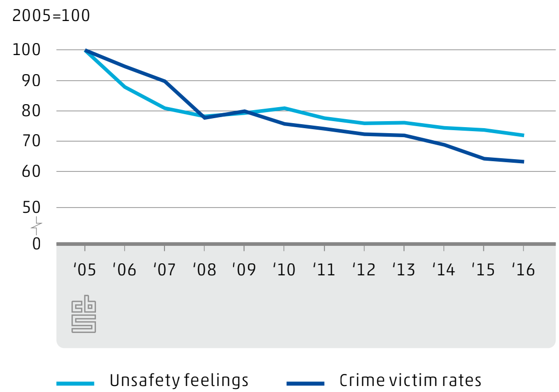
1.60 Crime victim rates by police district, 2016



The crime victim rate is above average in police districts in and around the four largest cities. Crime victim rates are below the national average in a number of districts, especially in the northeast, southeast and southwest. Rates range from 12 percent in the district of Zeeland to 31 percent in the district of Amsterdam West.

The share of people who have at one point become crime victim has declined almost continually for more than ten years. In 2005, nearly three out of ten Dutch citizens stated they had been victims of a criminal offence.

1.61 Crime victim rates and unsafety feelings

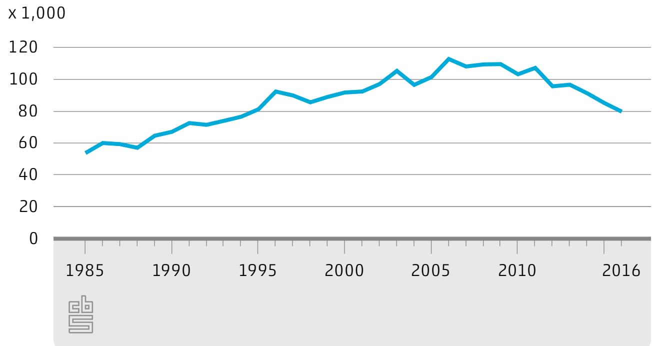


By 2016, this was less than two in ten, a decline of 37 percent. In line with falling crime rates, the number of people who sometimes feel unsafe has become progressively lower.

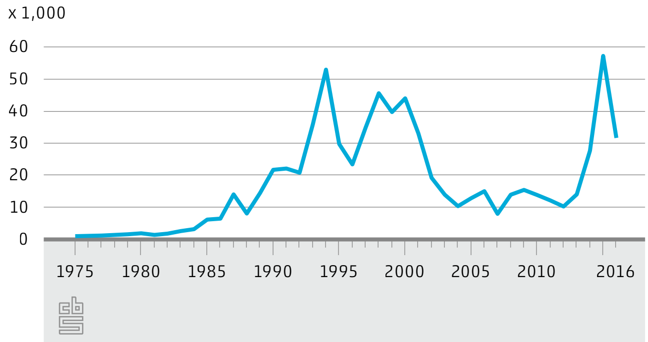
The introduction of smoke and fire detection systems has led to more fire alarm call-outs at fire stations. Many have turned out to be false alarm, however. Fire services have been successful in reducing the number of fire alarms for several years. In 2016, almost 36 percent of reported fire incidents were handled by the control rooms.

In 2016, the Netherlands received more than 31 thousand new asylum seekers and following family members. This is nearly half the number in 2015, when almost 57 thousand persons requested asylum in the Netherlands. Syrian asylum seekers have constituted the largest group in recent years. During the 1990s, the majority of asylum seekers were from the former Yugoslavia.

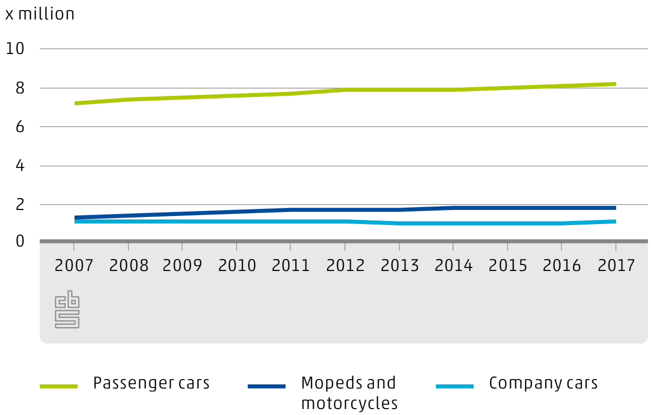
1.62 Fire alarm call-outs at fire stations



1.63 First asylum requests and following family members

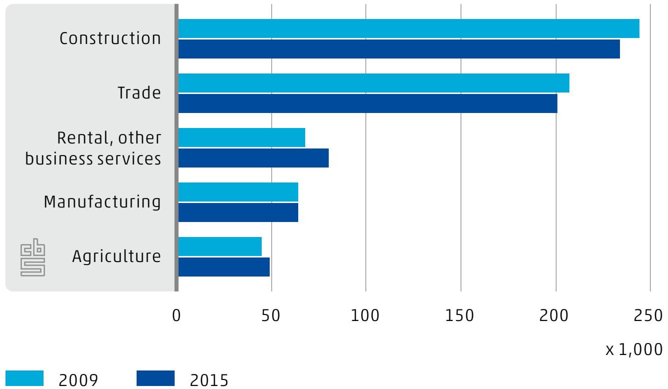


1.64 Motor vehicles



Source: CBS, RDW.

1.65 Delivery vans in top 5 business sectors



Traffic

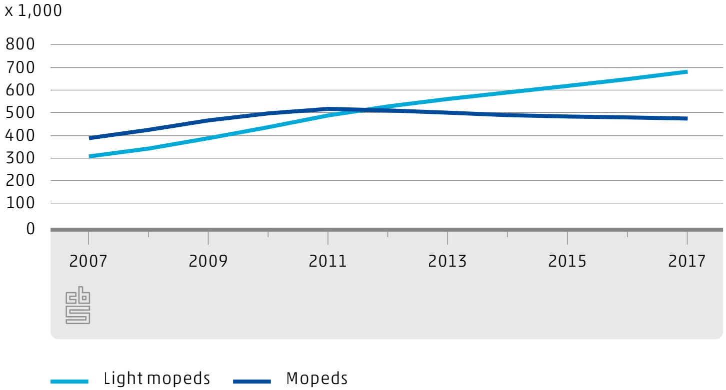
The number of passenger cars in the Netherlands is still rising. There were 8.2 million cars at the beginning of 2017, an increase of one million over ten years. The number of motorcycles and mopeds has risen continually as well: over the past decade, by nearly 500 thousand to 1.8 million in 2017.
The number of commercial vehicles has remained basically unchanged.

In 2015, over 53 percent of commercial vans were registered in the name of construction companies, wholesalers and retailers.
The number of vans registered by companies in these sectors has declined relative to 2009.
By contrast, the number of registrations in the name of rental and other business support services went up in 2015.

Over the past few years, there has been a sharp rise in the number of vehicles with a moped number plate, such as (light) mopeds and microcars, in comparison with other motor vehicles such as cars and motorcycles. This is mainly attributable to the growing popularity of the light moped. Since 2012, there have been more light mopeds than mopeds on Dutch roads. There were approximately 200 thousand more light moped than mopeds at the beginning of 2017.

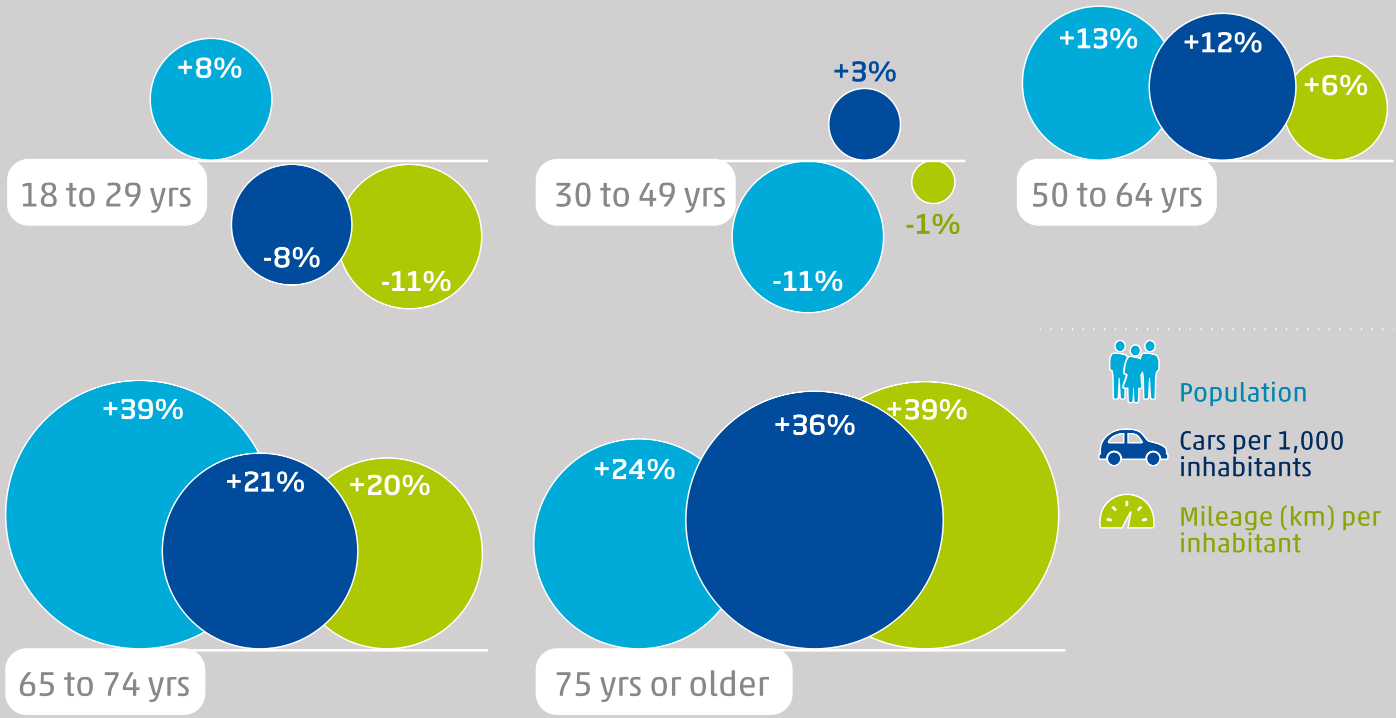
In 2015, private cars covered a total distance of 91 billion kilometres, a 6 percent rise compared with 2005. Between 2005 and 2015, the sharpest increase in travel distance was on account of drivers aged 65 and over: up 68 percent to a total of 14.2 billion km. On the other hand, young road users (18 to 29 years) travelled fewer kilometres: down 4 percent to a total of 10.6 billion km.

1.66 Mopeds and light mopeds

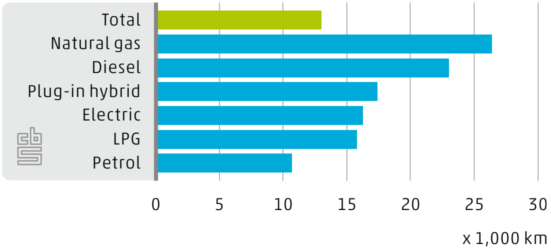


Source: CBS, RDW.

Car ownership and mileage by age group, changes, 2005-2015



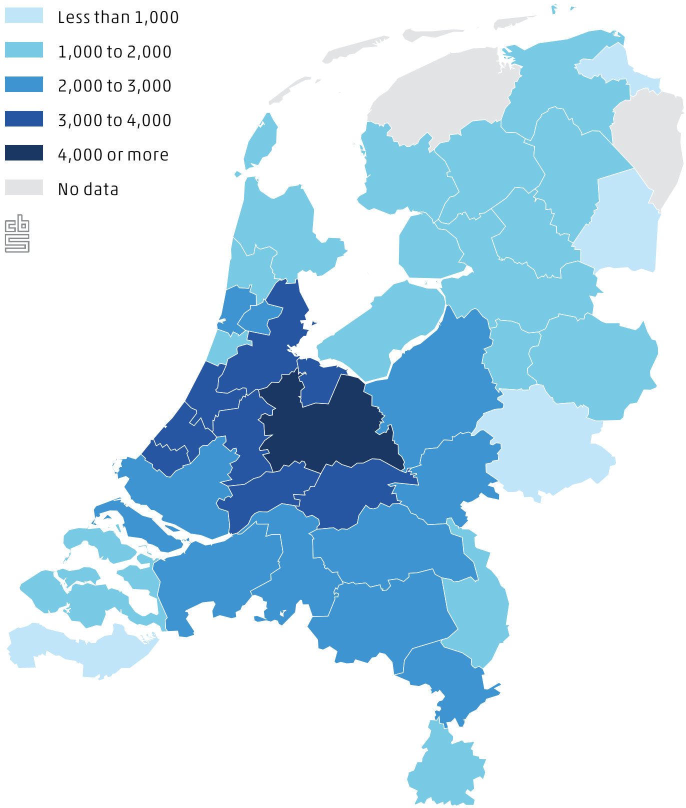
1.67 Average travel distance, 2015



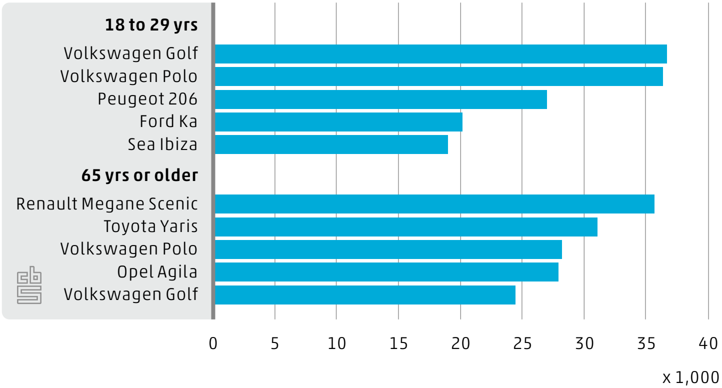
The average total distance covered by electric cars was 16.3 thousand km in 2015, while plug-in hybrids covered 17.4 thousand km. Most of these cars were company cars: 85 percent of plug-in hybrids were used for commercial purposes. Likewise, cars powered by natural gas and diesel were often used as company cars. These accounted for the longest distance on average with over 26 thousand and 23 thousand km respectively per year. The least popular cars were those on LPG and petrol.

The average number of vehicles per hour on national trunk roads varies widely per region. In the Utrecht region with national trunk roads A1, A2, A12, A27 and A28, average hourly traffic intensity in 2016 was 4,286 passenger cars, freight vehicles, buses and motorcycles.

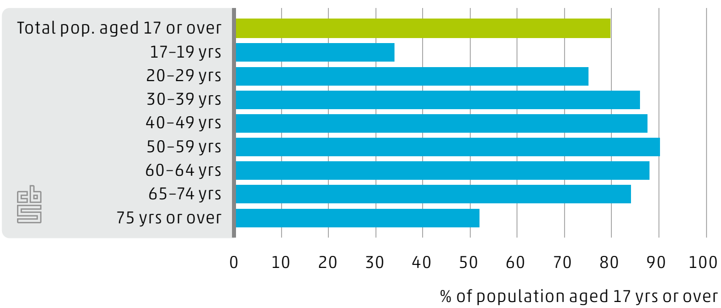
1.68 Traffic intensity: average number of vehicles per hour on nationalroads, 2016



1.69 Top 5 car brands, 1 January 2016



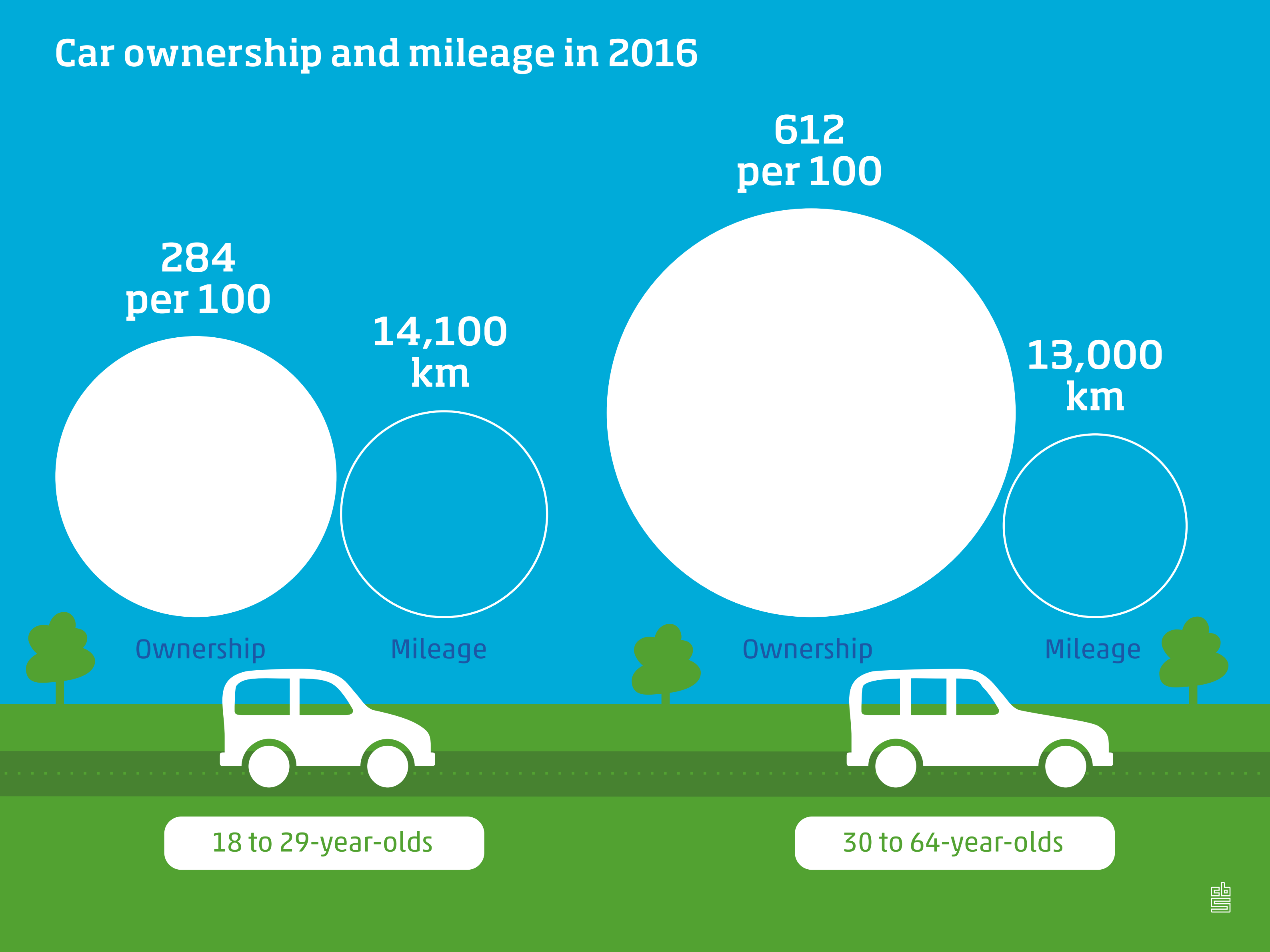
1.70 Driving licence holding, 1 January 2017



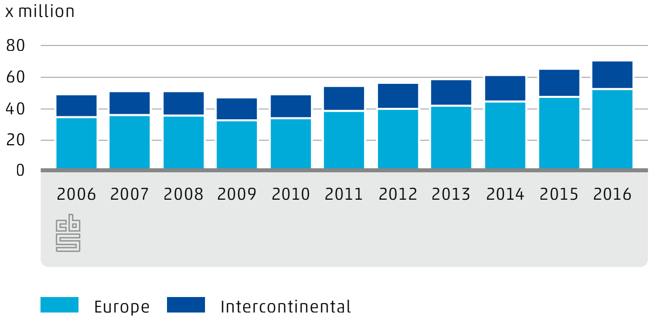
This makes Utrecht the Netherlands' busiest region. Traffic intensity is 16 times higher than around Delfzijl, the region with the lowest number of road users.

The most popular car models among Dutch drivers under the age of 30 are the Volkswagen Golf and the Volkswagen Polo. The over-65s also like Volkswagen, but even more popular are the Renault Megane Scenic and the Toyota Yaris.

Eighty percent in the Dutch population aged 17 and over hold a driving licence. Ninety percent of people between 50 and 59 have a driving licence, the highest percentage among all age groups. In the youngest (under 30 years) and the oldest age groups (75 years and over), fewer people hold a licence.


Car ownership and mileage in 2016
284
per 100
14,100
km
612
per 100
13,000
km
Ownership
Mileage
Ownership
Mileage
18 to 29-year-olds
30 to 64-year-olds

1.71 Passengers at Dutch airports, by origin/destination



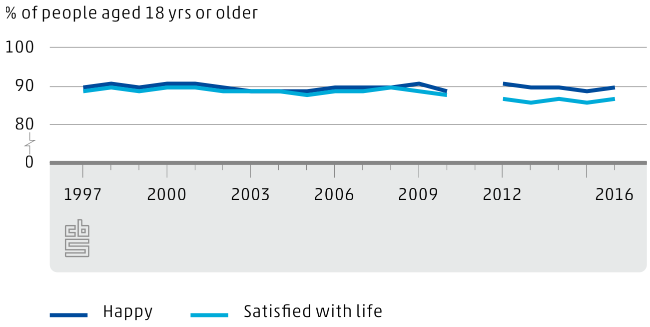
The number of passengers flying to or from Dutch airports has grown steadily for several years.
In 2016, nearly 70.3 million passengers checked in and out at Dutch airports, up from 48.6 million in 2006. Low-cost carriers have contributed to the growth in air traffic across Europe.

Well-being

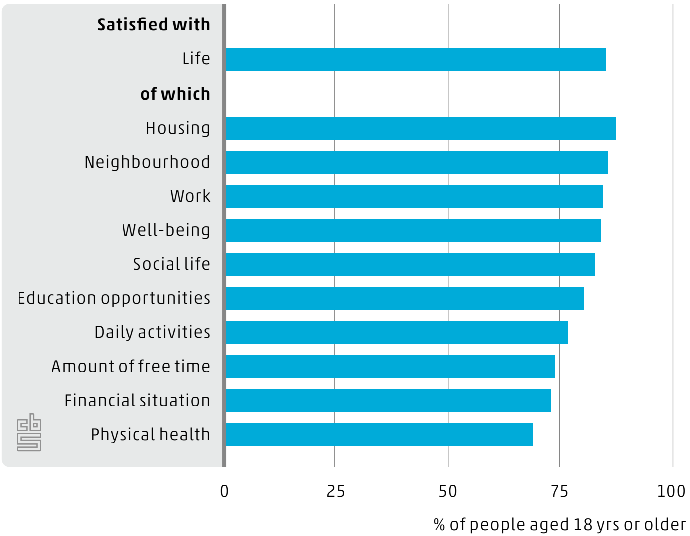
The Dutch are generally very happy people. Almost 9 in 10 adults say they are happy. A slightly smaller group are satisfied with life in general. Both shares have remained stable in recent years. Due to a change in research methodology, figures over 2012–2016 are not entirely comparable with figures over 1997–2010.

Almost 88 percent of the adult population say they are satisfied with their housing situation. The neighbourhood is rated positively by a slightly smaller share. Lower satisfaction levels are seen when it comes to people's physical health, their financial situation and the amount of free time they have available. As for job satisfaction, people who were asked this question worked at least 12 hours a week. Those working less than 12 hours per week or not in paid employment were asked about their level of satisfaction with daily activities.

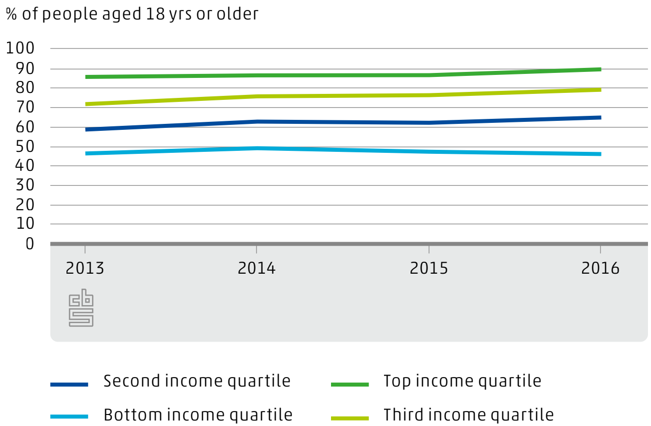
1.72 Happiness and life satisfaction



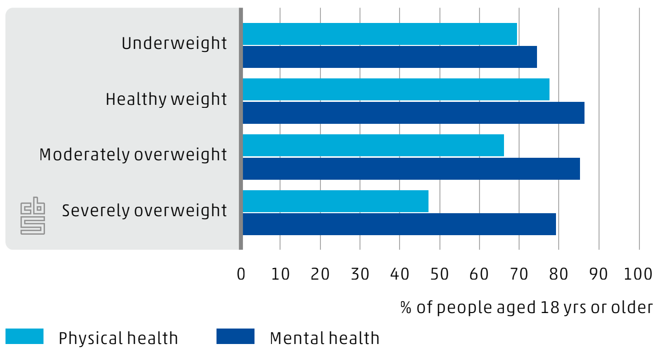
1.73 Share of satisfied people in the Netherlands, 2016



1.74 Financial satisfaction



1.75 Satisfaction with health status



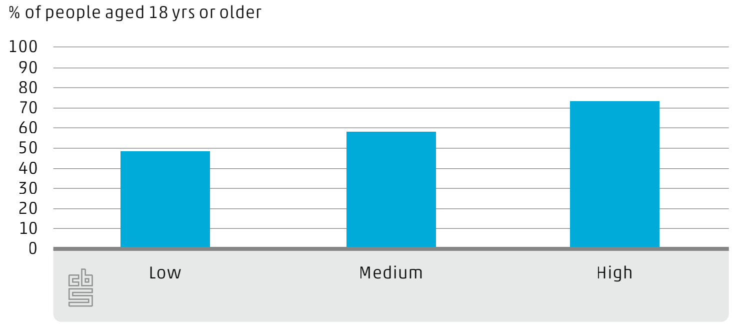
People with higher incomes tend to be more satisfied with their financial situation than those on lower incomes. Among people in the lowest income quartile, slightly less than half are happy about their financial situation; this satisfaction level has not risen over the past few years, either. By contrast, the share of people in the higher income groups who are happy about their financial situation has increased. In the highest income group, 9 in 10 people are satisfied with their financial situation.

There is a relation between obesity and health situation. Severely obese people are least likely to be satisfied with their own health, while those with a healthy body weight are most positive about their health situation.
Underweight people are slightly more positive about their health than those who are moderately overweight.
The relation between body weight and well-being is less distinct. People with a healthy body weight report the highest well-being while the lowest well-being is felt among those who are underweight. The differences in psychological well-being are not very large, however.

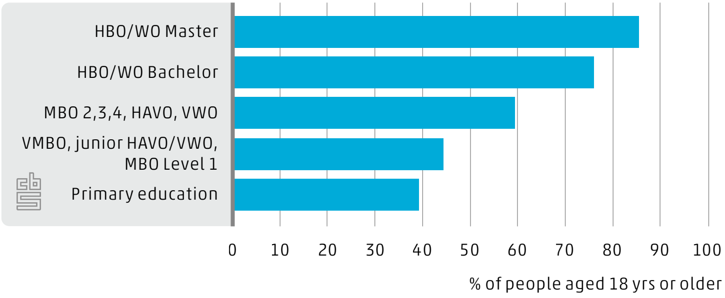
Personal well-being increases as the educational attainment level gets higher: over 70 percent of people with a higher education level also have high personal well-being, versus less than half of the lower educated. Personal well-being is captured in a single figure which summarises eight different aspects of well-being, including health, material wealth, social relations and safety feelings.

The higher the level of education, the more trust people have in their fellow citizens. The level of social trust among the highly educated (i.e. those with a professional or academic Master's degree) stood at 85 percent. Among people with only basic education, the level is not even 40 percent.

1.76 High personal well-being and educational attainment level, 2016



1.77 Social trust and educational attainment level, 2016



How happy are the Dutch?


XXL
WOON
BOULEVARD
BREDA
XXL
WOON
BOULEVARD
BREDA
QAZQA

2. Economy

Trends

Gradual recovery from severe recession
The Dutch economy grew by 2.2 percent in 2016. It was the second year in a row that the economy grew by more than 2 percent. In recent years, the Dutch growth rate has stood out favourably among European countries. However, the economic crisis also ran deeper in the Netherlands. On balance, the Dutch economy has not developed very favourably since 2008; France, for example, has seen more rapid growth.

Gross domestic product (GDP) per capita, a measure for economic prosperity, exceeded the level of 2008 for the first time in 2016 on the back of further economic recovery. This was also the case in many other EU countries, except in the south. The Netherlands' GDP per capita is one of the highest in the European Union.

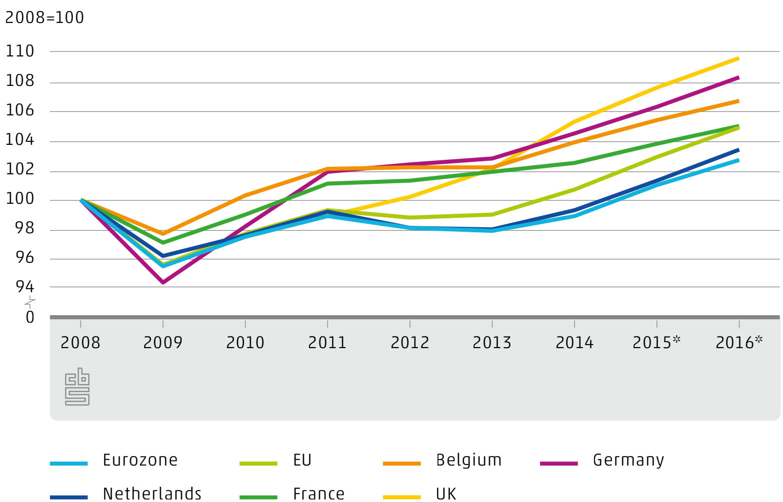
Unemployment still high
The fact that the Netherlands has climbed out of deep recession is furthermore evident from recent labour market developments. Unemployment stood at precisely 6 percent of the working-age population in 2016 and is still at historically high levels. At the end of 2016, 467 thousand people under the AOW entitlement age were dependent on income support, 17 thousand up from one year previously. Most other labour market developments were positive. Around 100 thousand new jobs were created and the unemployment rate saw the largest decrease in a decade. The number of unemployment (WW) benefit recipients declined as well, while the number of employees on permanent contracts increased for the first time in years. However, the share of permanent employees in the total active labour force declined further.

Median household income increased by 2.3 percent in 2016, partly due to rising employment. The average wage increase was relatively high as well. CLA wages rose much faster (by 1.8 percent on average) than consumer prices, which saw only a minor increase. Consumer spending as a portion of household income has continued to rise in recent years. In addition, companies have spent a greater share of their revenues.

Multifaceted growth

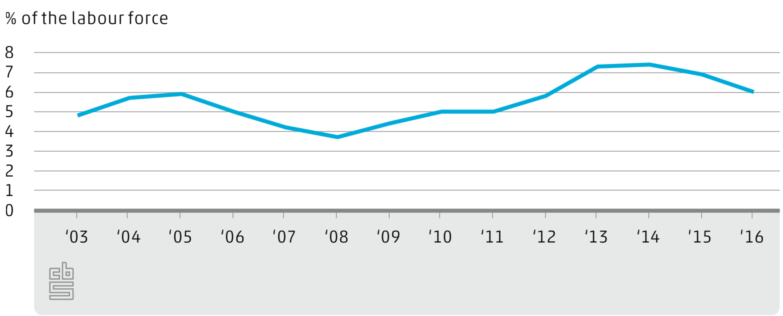
The current economic recovery is broad-based. The export motor keeps running, while consumption and especially investments have picked up again in recent years, with residential investment up in particular. The volume of export of goods produced in the Netherlands grew by 4.0 percent in 2016. In line with this, the manufacturing industry had a good year. Furthermore, the construction sector has begun recovering after a severe contraction between 2009 and 2013. In addition, the hotel and restaurant sector recorded solid growth, as did business services, especially the temporary employment and travel sectors.

2.1 Gross domestic product (GDP)

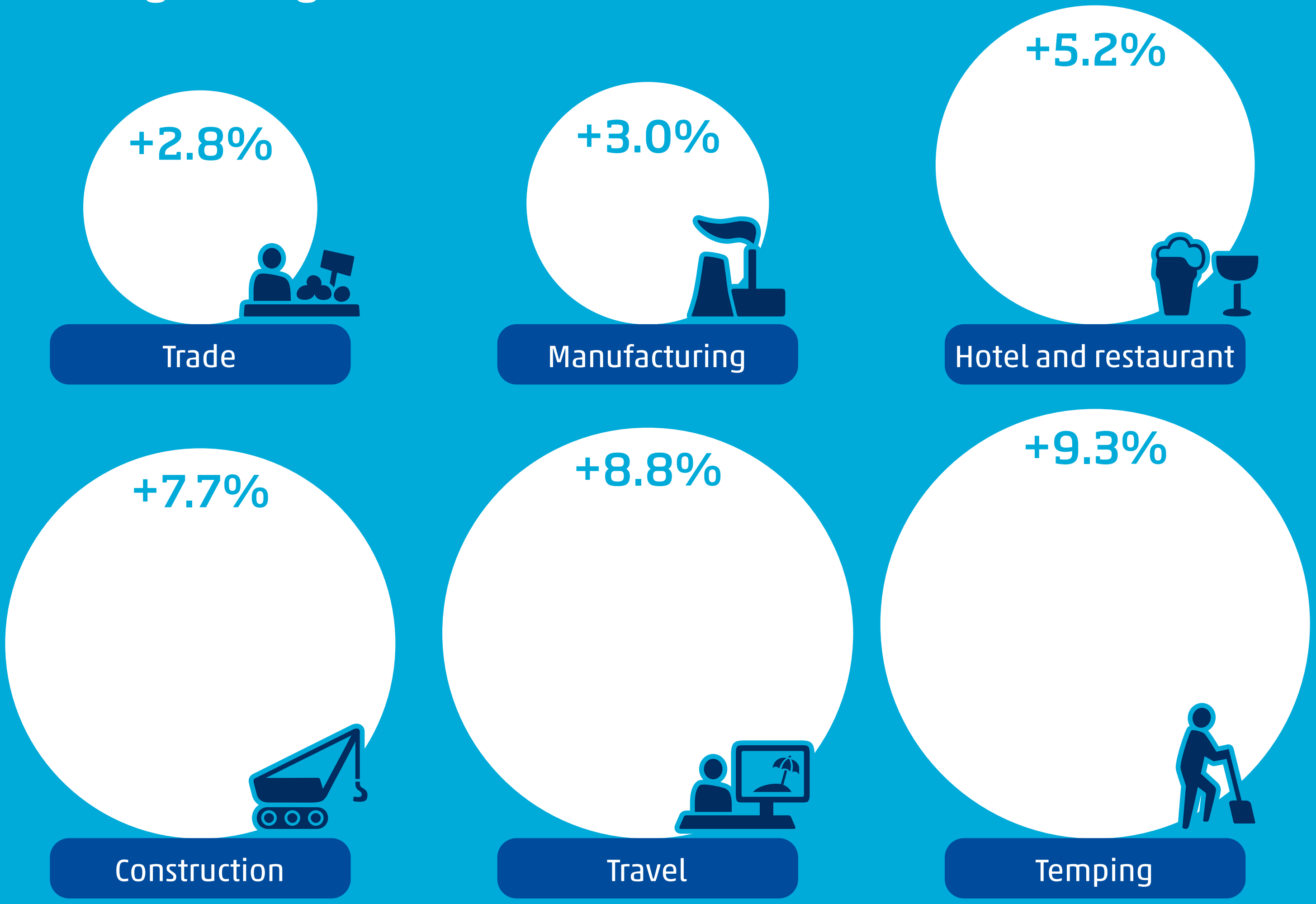


Source: Eurostat.

2.2 Unemployment rate



Fast-growing sectors, 2016



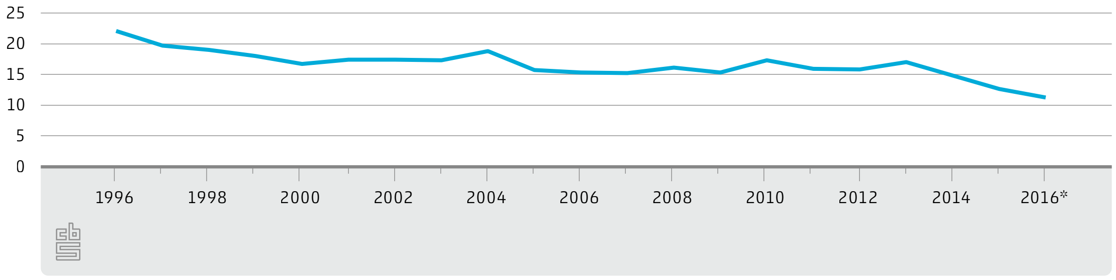
On the other hand,the mining and quarrying sector has fared significantly less well. Due to further reductions in natural gas extraction, revenues in this sector have dropped sharply in recent years. The government's natural gas revenues have fallen by more than 75 percent over the past three years. If natural gas production had remained at the same level as the previous year, economic growth in 2016 would have amounted to 2.5 percent.

Increased activity on the housing market

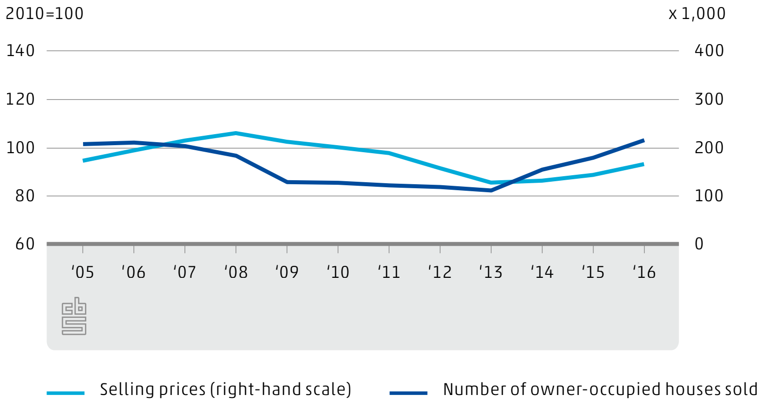
The slump on the Dutch housing market is often quoted as the main cause of the relatively deep recession as compared to many other European countries. In 2013, residential property sales had nearly halved relative to 2006. The number of transactions increased sharply after that. In 2016, 215 thousand (existing) dwellings were sold, breaking the old record of 2006. House prices are on average still lower than their peak in 2008. Only cities such as Amsterdam and Utrecht have reached pre-crisis levels again or even exceeded them. Just as house prices fell and the decreasing number of transactions had a dampening effect on the economy, rising prices and number of transactions have had positive effects: people buying a house usually also spend on items such as kitchens, furniture and paint.

2.3 Value added in mining and quarrying sector

bn euros, in prices of 2010



2.4 Existing home sales, price and volume



Moderately rising consumer prices

Although house prices rose again considerably in 2016, only a modest rise was seen in prices for consumer goods and services. In July 2016 prices were on average even lower than one year previously. Falling energy prices in particular had a significant downward effect on average price levels. Prices did increase slightly more rapidly in the final quarter. On average, consumer prices were only 0.3 percent up on the previous year. The rise in consumer prices excluding energy, food, alcohol and tobacco was small at 0.8 percent.

Higher CO_2 emissions

The Netherlands' recent economic growth has had consequences for the environment.
After adjustments for the slightly colder winter weather, CO2 emissions increased by 1.2 percent in 2016 relative to the previous year. On the other hand, coal consumption by power stations was much lower in 2016. The share of renewable energy in total electricity production increased from 11 to 13 percent.

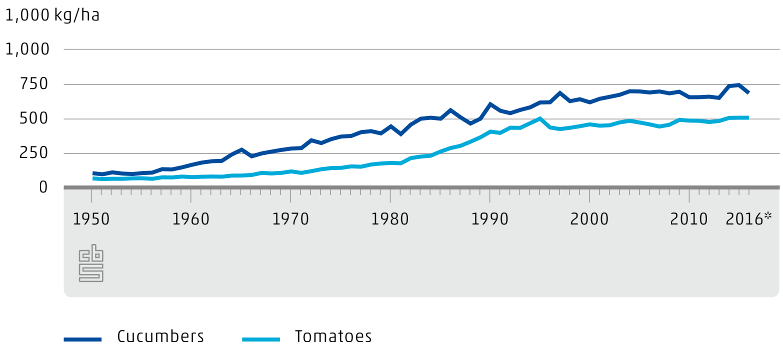
Figures

Agriculture

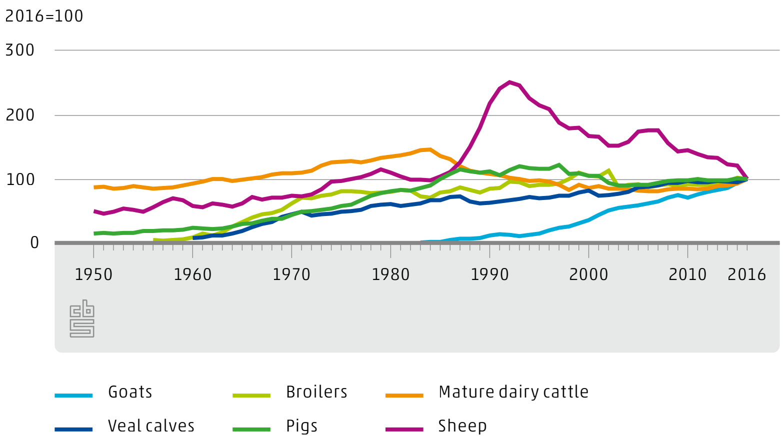
Yields in greenhouse vegetable cultivation have increased substantially. In 1950, cucumber cultivation yielded approximately 10 kg per square metre. This had risen to nearly 70 kg per square metre by 2016. For tomato growers, yields rose nearly 8-fold. Innovations have played an important role in this growth. From the mid-1960s onwards, greenhouses were heated by natural gas from Slochteren, and the residual CO_2 – not containing pollutants such as flue gases – could be used for fertilising purposes.
In the 1970s, crop growing on substrate was introduced, allowing better control of temperatures as well as better delivery of moisture and nutrients.

As shown by this graph, developments in the Dutch livestock population have been fairly volatile. After the introduction of milk quotas and the imposition of fines for excess milk production (super levies) in 1984, the mature dairy cattle population declined considerably. Anticipating the abolition of the milk quota system, dairy

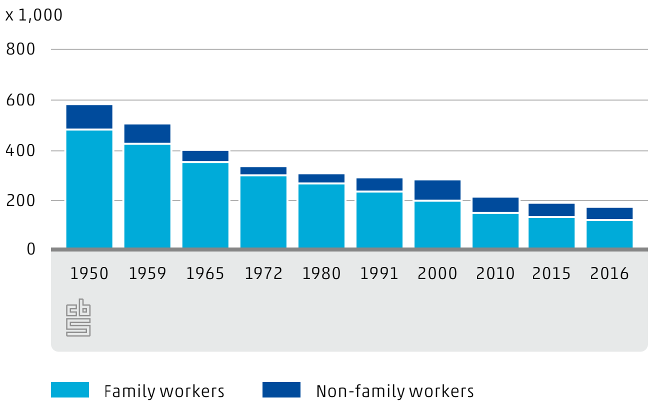
2.5 Annual yield of cucumbers and tomatoes



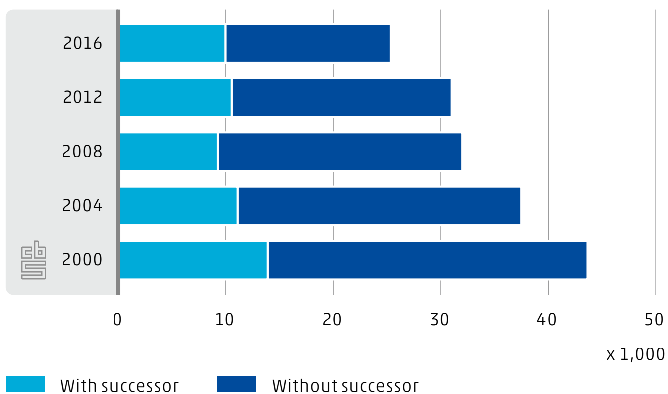
2.6 Livestock on farms



2.7 Agriculture and horticulture workers



2.8 Agricultural holdings with/without successor



farmers started to slowly increase their livestock herds. By 1 April 2015, the number of dairy cows had increased again to 1.62 million, and the population increased further to 1.74 million by 1 April 2016.
Meanwhile, structural measures have been taken which are aimed at reducing the dairy herd in order to meet phosphate limits. These include a subsidy scheme which will pay farmers who want to fully stop producing milk (the Stoppersregeling), as well as a step-by-step reduction of the dairy herd on dairy farms.

Employment levels in agriculture and horticulture have decreased markedly since 1950. There were 580 thousand permanent workers in 1950. This number had dropped to 172 thousand by 2016. The average labour force now amounts to 3.1 per holding. The number is highest in the greenhouse areas of Westland and around Aalsmeer. The decline was mainly due to mechanisation, rationalisation and increasing scale.

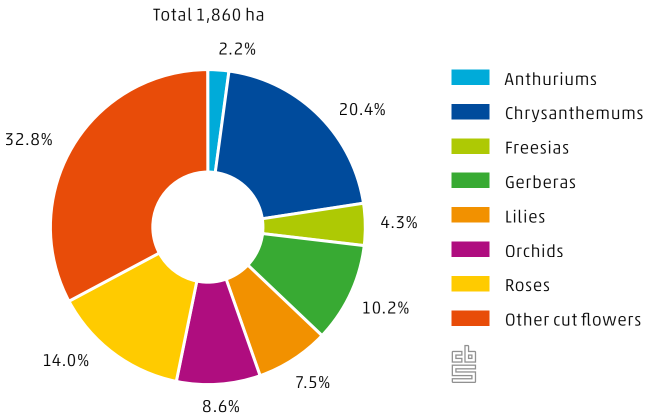
Most farms do not have an exclusive successor. Of the 25 thousand agricultural holdings where the holder is 55 years old or over, more than 15 thousand do not have any successors.

The share is higher among the larger holdings (up to 70 percent) than among medium-sized holdings (50 percent). The small holdings find it especially difficult to find a successor: in 2016, only one in four had arranged for this.
Dairy farms are relatively most likely to find a successor. Least likely are sheep farms, as well as pot-plant and bedding-plant holdings.

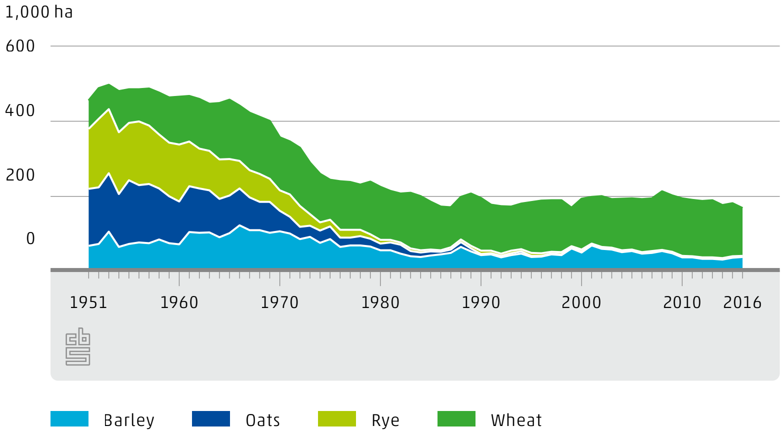
Cut flower production under glass has decreased by 40 percent in the span of a decade. The area of land used for lilies was down by 40 percent, while the area for freesias has almost been halved. The area used for roses decreased by nearly two-thirds. Cut flower production in the Netherlands is affected by competition from African countries in particular.

Cultivation of rye and oats has seen a steep fall since 1950s, nearly disappearing from the Netherlands by 2016. Rye (1.6 thousand hectares) and oats (1.5 thousand hectares) were primarily used as fodder and have been replaced by silage maize and soy. Barley, on the other hand (at 35 thousand hectares), has stood the test of time. Barley is also supplied to beer breweries, provided the quality is deemed acceptable.

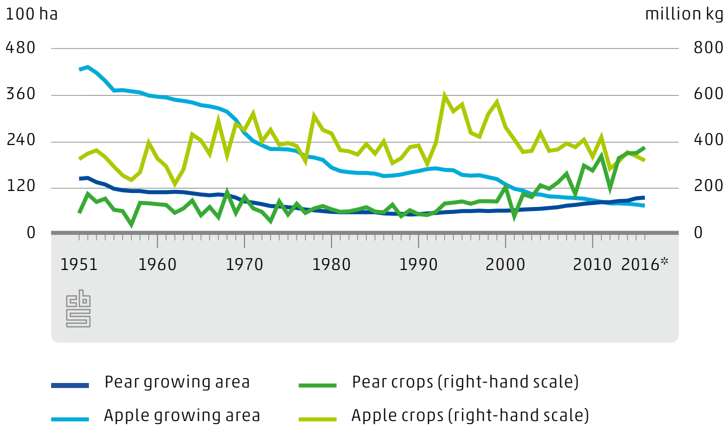
2.9 Cut flower growing area, 2016



2.10 Cereal growing area



2.11 Apple and pear crops and growing area



Fruit production has grown multiplefold since the 1950s, due to an increase in productivity outpacing the decline in the acreage for fruit orchards. Back in 1950, the yield from one hectare of apple trees was 6 tonnes. But in 2016, the same hectare of land would yield 43 tonnes of apples. Productivity at pear orchards increased a bit more slowly with a yield of nearly 8 tonnes per hectare in 1950s and nearly 40 tonnes by 2015.

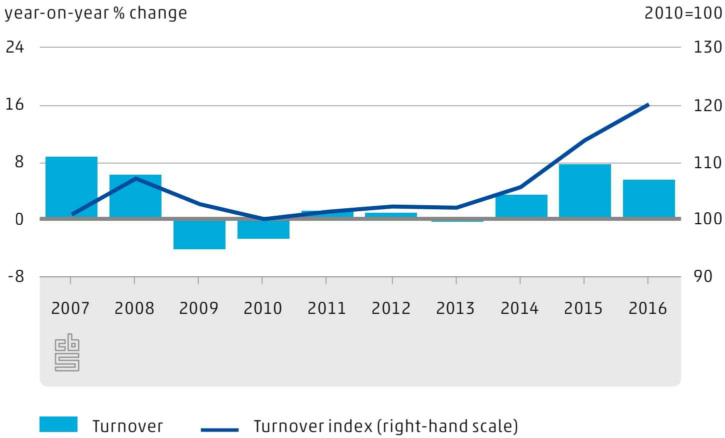
The raised productivity is mainly the result of more mineral fertilisers and pesticides. In addition, improved plant breeding techniques, exchange of knowledge among growers and business innovations have contributed significantly.

Business services

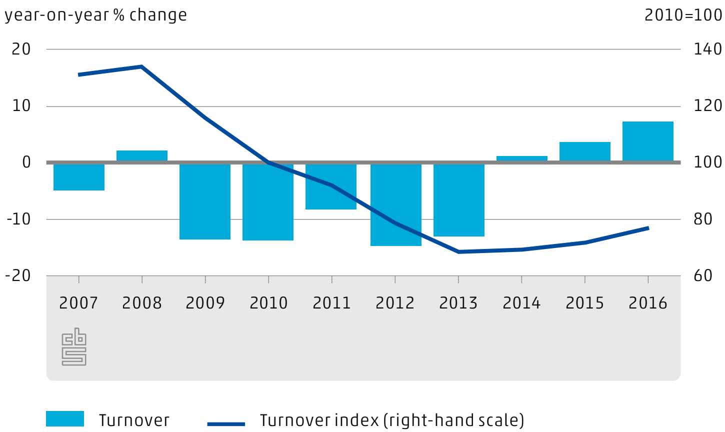
Business services turnover was up by 5.6 percent in 2016. It was the third consecutive year of turnover growth relative to the previous year. Since 2007, business services turnover has risen by 19.1 percent. Dutch travel agents and tour operators realised over 90 percent more turnover in 2016 than ten years previously. However, not all the industry sectors within business services achieved higher turnover; publishers and architects, for example, reported losses of more than 25 percent over this ten-year period.

In 2016, architectural firms posted their strongest turnover growth in ten years, namely 7.3 percent. It was the third consecutive year of growth; after hitting a record low in 2013, the firms are back on track but their turnover continues to be far below pre-crisis levels.

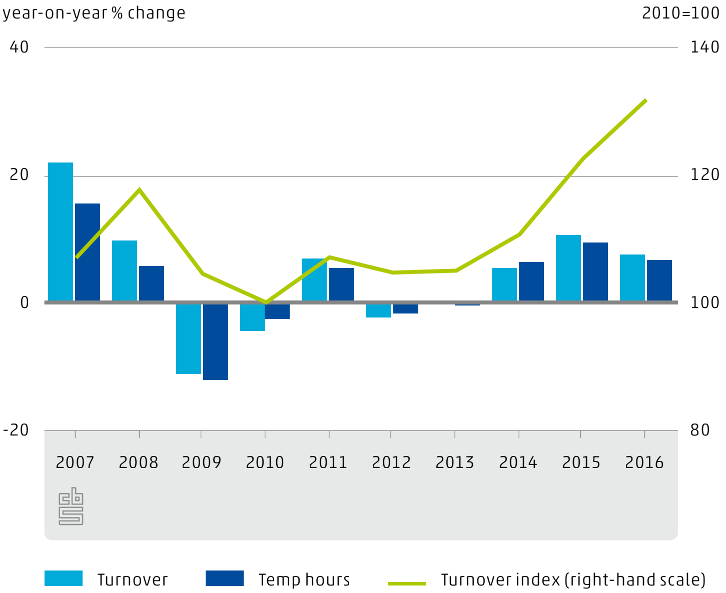
2.12 Turnover in business services



2.13 Turnover by architectural firms



2.14 Turnover and hours by employment agencies



Turnover in the (temporary) staffing sector rose by 7.6 percent in 2016. Both turnover and hours fell sharply after the crisis of 2008 and growth was negative once again in 2012, one year before the 2013 economic downturn. Since 2014, temp hours and turnover have shown an upward trend again.

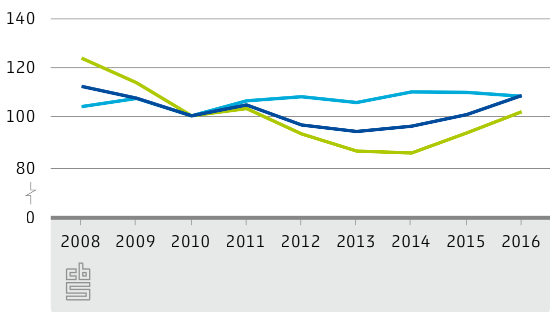
Construction and housing

Turnover in the construction sector grew by 6.5 percent in 2016 relative to the previous year. The highest growth rate was recorded in residential and non-residential construction: 9.4 percent. The civil engineering segment suffered a decline in turnover of 1.4 percent. Small businesses (employing up to 10 persons) achieved the best results with turnover increasing 8.5 percent on average relative to one year previously. At 4.0 percent, turnover growth was slowest for large businesses (over 100 employed persons).

At the end of 2016, business confidence reached its highest level since 2008. In the construction sector, it rose above all other sectors and above the private sector as a whole. Building contractors report a positive mood with well-filled order books.

2.15 Turnover construction

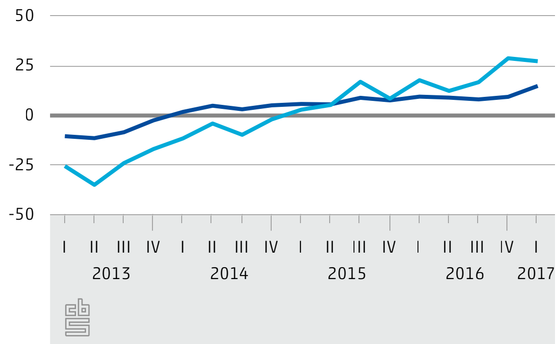
2010=100



Civil engineering
Specialised construction
Residential and non-residential

2.16 Entrepreneurial confidence (seasonally adjusted)

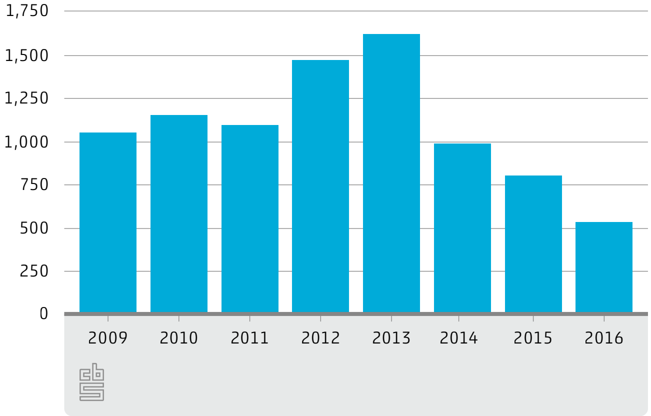
Balance % positive and negative answers



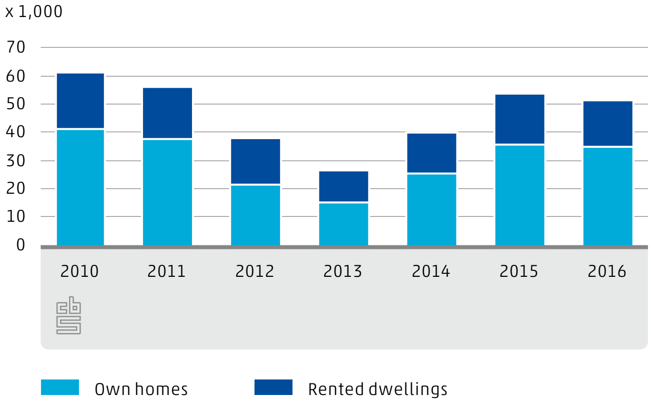
Total private sector
Construction

Source: CBS, EIB, KvK, MKB-Nederland, VNO-NCW.

2.17 Bankruptcies construction



2.18 Building permits issued for new homes



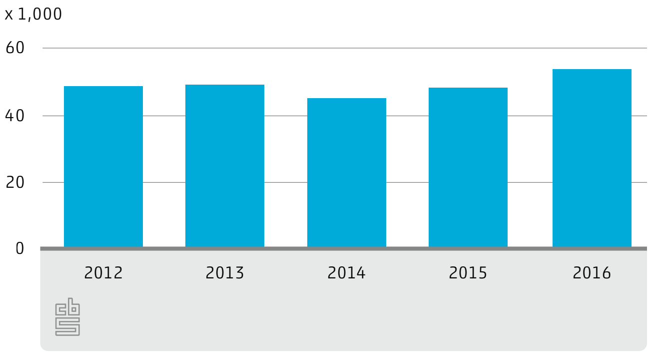
The number of bankruptcies decreased in the construction sector for the third year on end and stood at 539 in 2016, the lowest number in years.

In 2016, 51 thousand building permits were granted for new dwellings, 2.5 thousand (5 percent) less than in 2015. The number of permits for owner-occupied homes (35 thousand) fell by 2 percent, for tenant-occupied homes (15.8 thousand) by 10 percent. Housing corporations in particular had fewer projects.
The number of permits for new-build homes in 2016 was above the low point in 2013, but certainly not yet back to pre-recession levels. During the period 2006-2008, for example, 90 thousand permits for new-build homes were granted each year.

Nearly 54 thousand new-build homes were reported as completed in 2016. This is more than 11 percent up on 2015, representing the highest number since 2012 and taking the current dwelling stock to 7,686 thousand (total by the end of Q4 2016).

House sales continued to rise in 2016. Over the year, 215 thousand homes were sold. This is almost 40 thousand more than in 2015. The number of transactions in 2016 was even 2 percent up from the peak year 2006. Sales were up in all provinces, particularly in Flevoland (28 percent); the lowest increase was in Noord-Holland (11 percent).

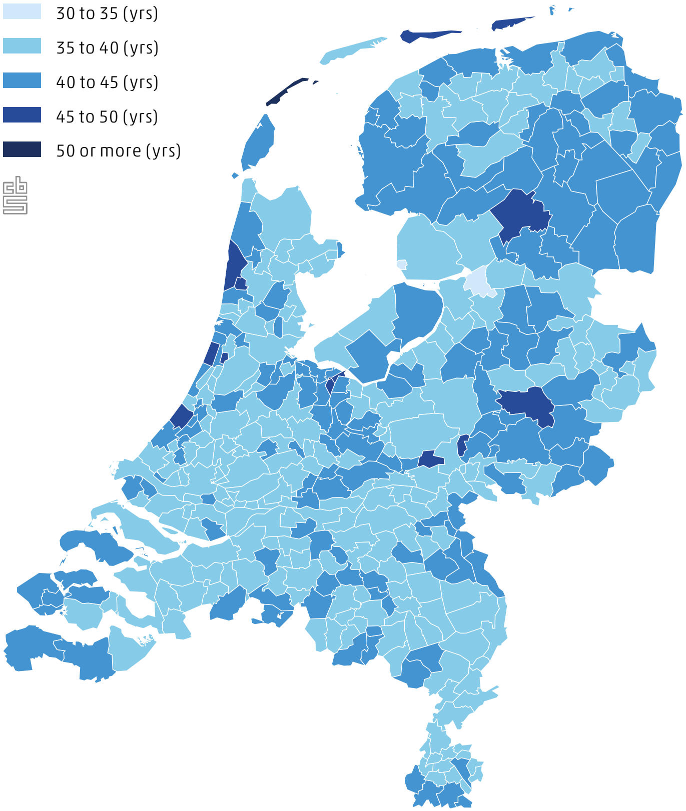
2.19 New-build dwellings



2.20 Existing owner-occupied dwellings, sales and prices

	2010	2014	2015	2016
	year-on-year % changes			
House price index of existing own homes	–2,2	0,9	2,8	5,0
	x 1,000			
Number of transactions	126	154	178	215

2.21 Average age of homebuyers, 2016



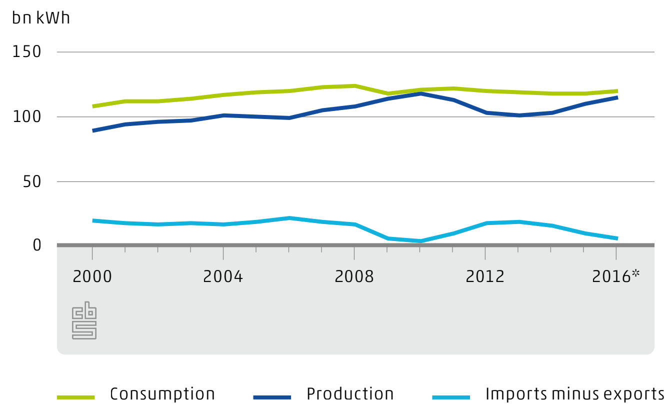
In 2016, the average age of first-time homebuyers was 39.4 years, up from 36.1 in 2007. The average age started to decline from the outset of the economic crisis in 2008. The share of (older) existing homebuyers dropped, leaving relatively more opportunities for (younger) starters on the housing market.
The average age of homebuyers increased again as of 2010, possibly due to stricter mortgage regulations effective as of 2013. Buying a new home became increasingly difficult as a result, especially for prospective starters.

Energy

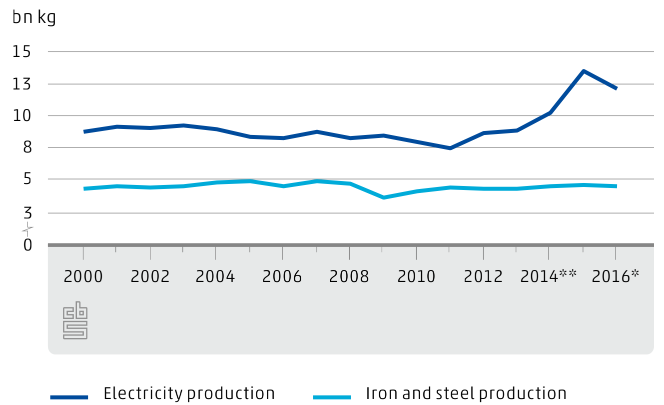
Over the past few years, electricity consumption has remained fairly stable at around 120 billion kWh. Consumption was at its highest level in 2008 (124 billion kWh). This level has not been reached since, due to the financial crisis of 2008, the resulting low economic growth as well as the savings effects of new energy-efficient appliances. Fluctuations in electricity production are related to developments in the international electricity market.
Total electricity consumption is calculated as the sum of domestic production and net import balance (imports minus exports).

Coal is used for electricity generation as well as iron and steel production. Considerably more electricity has been produced from coal in recent years as new coal-fired plants were gradually being put into service. Coal consumption declined slightly in 2016 when three old plants were closed down. Coal consumption for the production of iron and steel is fairly stable.

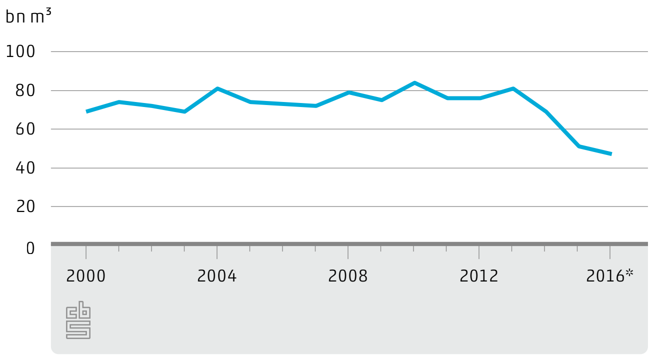
2.22 Electricity supply and consumption



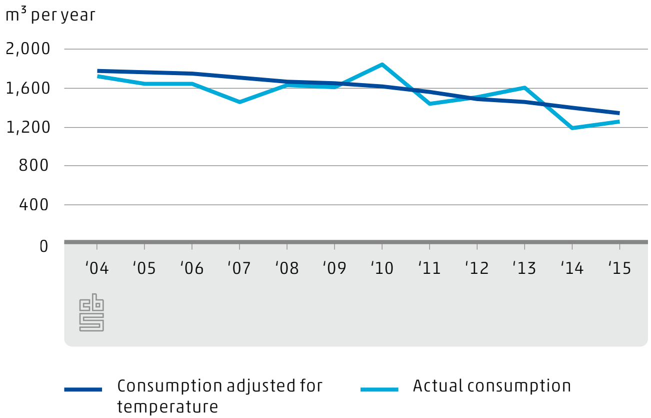
2.23 Coal consumption



2.24 Natural gas extraction from soil



2.25 Average natural gas consumption in homes



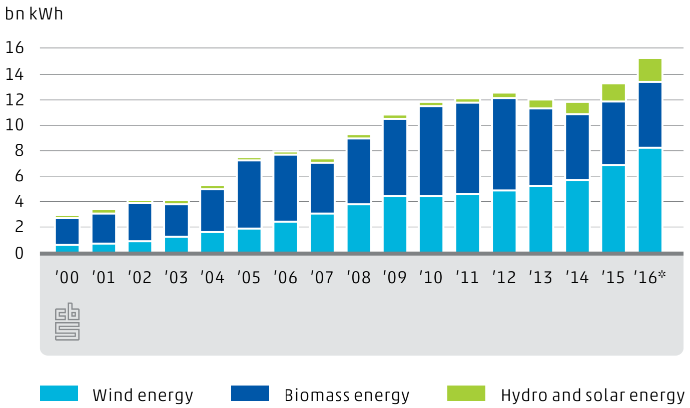
Natural gas production has dropped substantially in recent years. As earthquakes in Groningen province caused by gas extraction have posed increased safety risks, the government has gradually reduced the production cap. This has had a major impact on national gas revenues, which came under further pressure as a result of falling natural gas prices.

Average annual natural gas consumption in homes showed a downward trend as of 2004. Actual consumption is partly related to average outside temperatures and therefore shows an unpredictable pattern. When adjusted for temperature differences between the years, there was a decline of around 25 percent over this period. Energy-saving measures, energy-efficient new-build homes and an increase in alternative heat sources such as district heating and heat pumps all contributed to this decline.

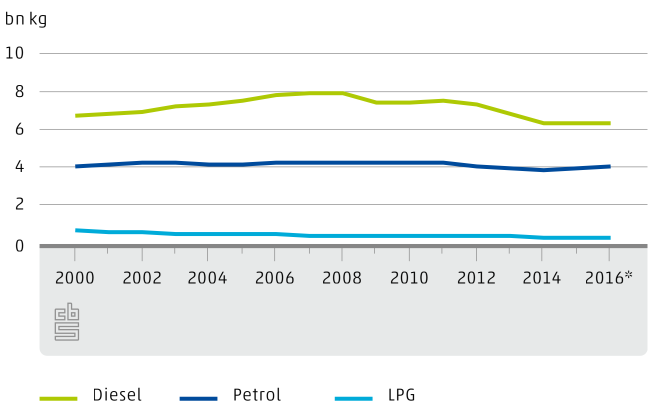
Renewable electricity production from sources such as wind, biomass, solar and hydro power is on the rise; there was a year-on-year increase of 15 percent in 2016. A major contributor was the new offshore wind farm near the island of Schiermonnikoog with a capacity of 600 megawatts. In 2016, almost 13 percent of total electricity consumption in the Netherlands was generated sustainably, up from 11 percent in 2015.

Compared to 2006, there was a 50 percent decline in the consumption of liquefied petroleum gas (LPG) for road vehicles in 2016. A main reason for this is that the number of cars on LPG has been halved since 2003. Petrol consumption has increased, as in the previous year; although petrol cars have become more fuel efficient, they drive more vehicle-kilometres as the economy picks up. Diesel consumption has stabilised over the past few years.

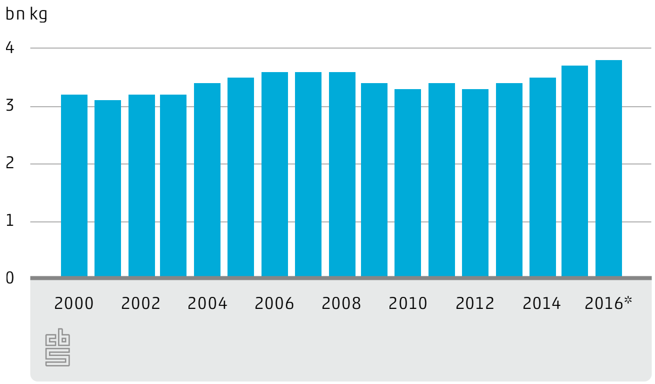
2.26 Renewable energy production



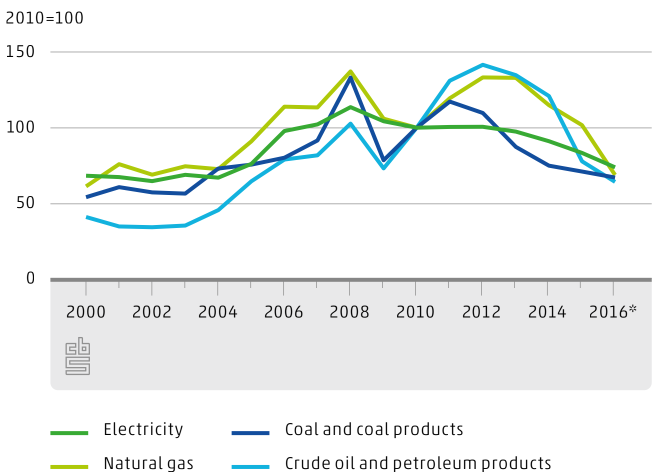
2.27 Motor fuel consumption



2.28 Aviation kerosine consumption



2.29 Prices of energy carriers



The strong growth in air traffic has taken kerosene consumption levels to a record high. Consumption was 2.5 percent higher in 2016 than in the previous year, almost exclusively on account of international air traffic. Schiphol Airport serves as an airline hub and stop-over point where aircraft need to be refuelled. This refuelling requires a total amount of energy equivalent to 165 petajoules (PJ), as much as the level of petrol consumption by vehicles.

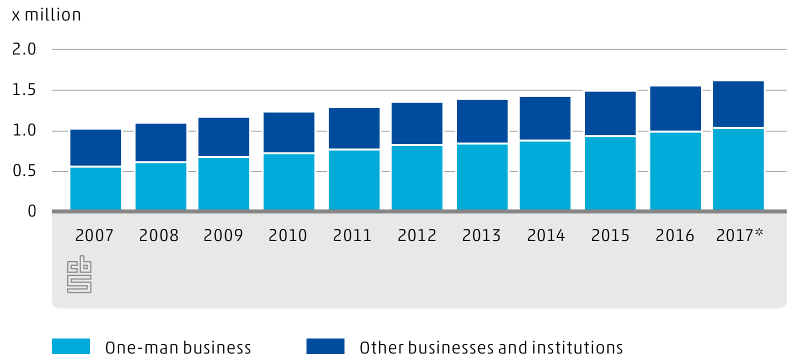
Producer prices of energy commodities have fallen in recent years. In 2016, natural gas prices declined in particular by as much as 30 percent. Electricity prices are influenced by coal and gas prices, as a lot of electricity is produced from these sources. Producer prices refer to prices of commodities which are available for domestic consumption. These are the amounts receivable by the producer or importer for the energy product supplied. They are affected by developments in Europe and the rest of the world and may fluctuate widely accordingly.

Enterprises

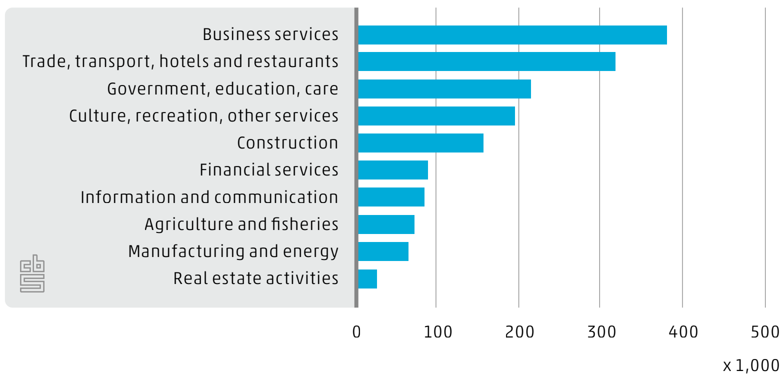
The number of businesses in the Netherlands has grown steadily since 2007 and stood at just over 1.6 million at the beginning of Q2 2017. In each year since 2007, the number of one-man businesses has increased more significantly than the number of businesses with other legal structures. One-man businesses are a popular legal form among the self-employed. Over one-quarter of all one man-businesses operate in business services.

The highest number of enterprises is found in the business services sector: 380 thousand at the beginning of Q2 2017, which are often one-man businesses (sole traders). The sector trade, transportation and hotels and restaurants ranks second with nearly 320 thousand enterprises, followed by the sector government, education and care and the sector culture, recreation and other services, each comprising around 200 enterprises and institutions. The sector renting and real estate activities had the lowest number of enterprises at the beginning of Q2 2017, namely 25 thousand.

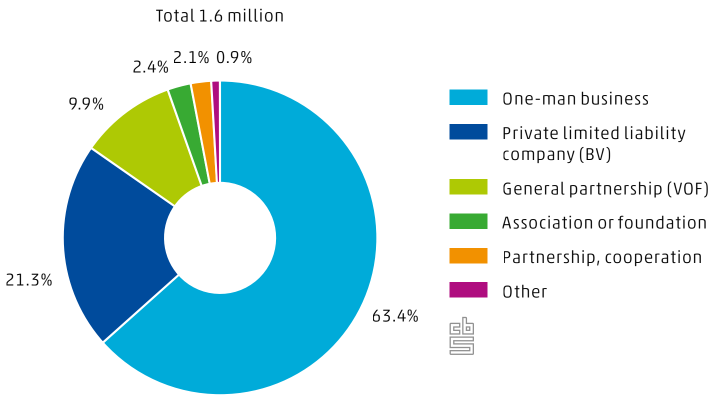
2.30 Businesses, Q2



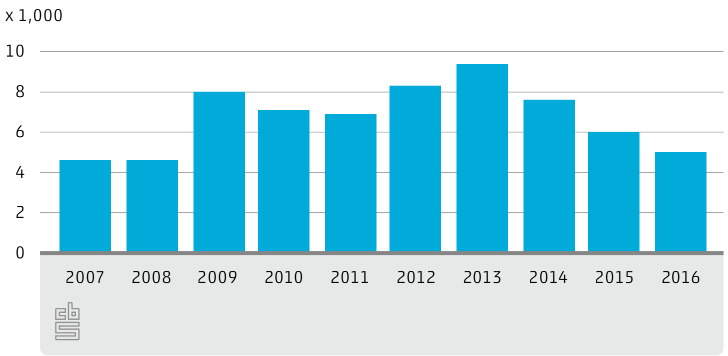
2.31 Businesses by sector, Q2 2017*



2.32 Business by legal form, Q2 2017*



2.33 Bankruptcies



Almost two-thirds of all enterprises and institutions are sole proprietorships (one-man businesses). Another common business structure is the private limited liability company (Besloten Vennootschap, BV). In Q2 2017, more than one out of five companies had this legal form. One in ten are general partnerships (Vennootschap Onder Firma, VOF).

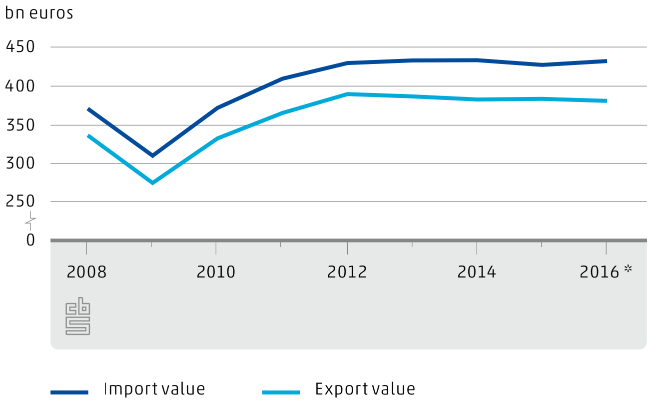
In 2016, 5 thousand companies went out of business: 4.4 thousand enterprises and institutions and 600 persons registered as sole traders. The total number of bankruptcies in 2016 was 17 percent lower than in 2015. It is also the lowest level since 2009. As in previous years, most bankruptcies were pronounced in the trade sector, followed by financial services.

International trade

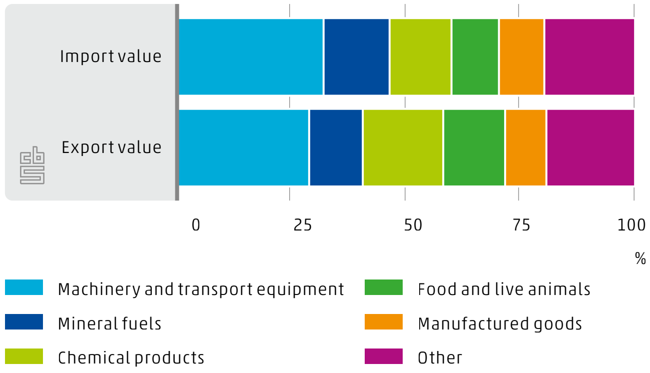
Due to the economic crisis that started in 2008, the import and export value of goods plummeted in 2009. International trade gradually recovered after that and the import and export value of goods surged again. As of 2012, the import value has fluctuated around 375 billion euros; the export value around 425 billion euros.

The Netherlands imported 381 billion euros worth of goods in 2016. Machinery and transport equipment accounted for one-third. Mineral fuels and chemical products had a share of 14 percent each. The Dutch export value of goods amounted to 432 billion euros in 2016, of which nearly 30 percent was on account of machines and transport equipment. Chemical products attributed 18 percent to the export value; food and live animals nearly 14 percent. Goods produced in the Netherlands relatively made the largest contribution to the export of food and live animals. In machines and transport equipment, the re-export value was highest.

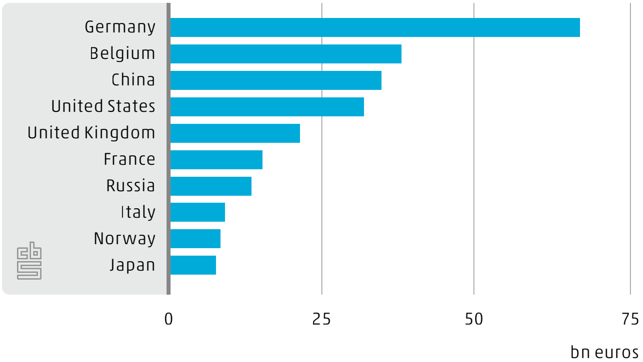
2.34 International trade in goods



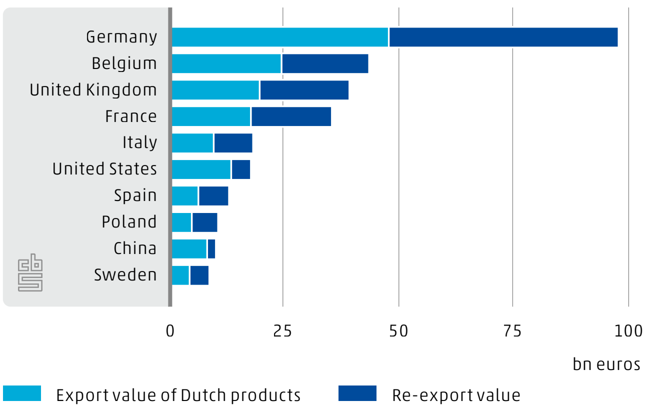
2.35 International trade in goods, 2016*



2.36 Top 10 countries importing goods, 2016*



2.37 Top 10 countries exporting goods, 2016*



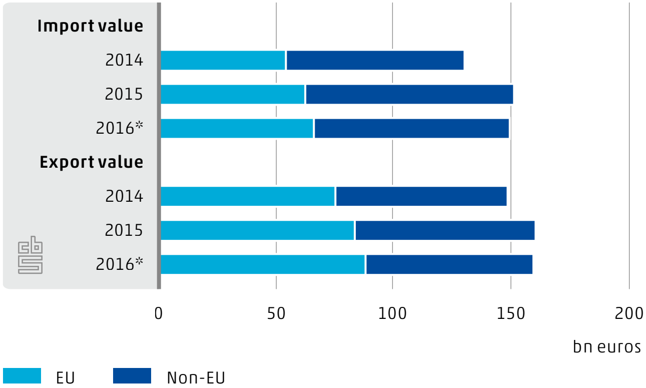
In 2016, the bulk of Dutch goods imports originated from the European Union (54 percent). Goods from Germany represented by far the highest import value, followed by goods from Belgium, China and the United States, although far behind Germany by 30 to 35 billion euros.

The highest value in Dutch goods exports stays within the European Union: almost three-quarters in 2016. The single most important destination is Germany (nearly 100 billion euros). Other EU countries occupy second to fifth place among the top ten destinations. The value of exports to these individual countries is however significantly lower than of exports to Germany. In sixth place is the United States as the first non-EU destination.

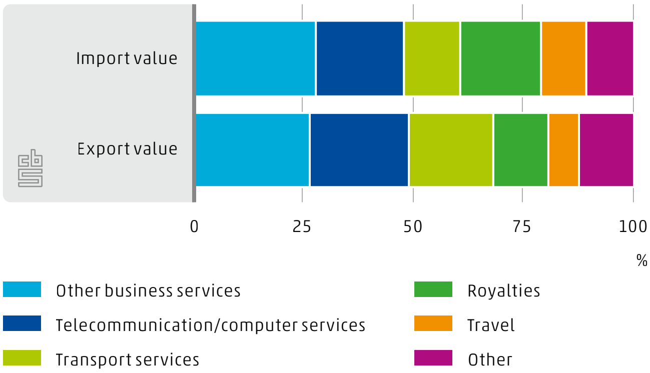
In 2016, the Netherlands imported almost 150 billion euros and exported 160 billion euros worth of services, for example 15 percent more imports and 7 percent more exports relative to 2014. This increase mainly took place in 2015. Over the past three years, cross-border trade in services – both imports and exports – has increasingly been focused on the European Union. In 2016, the EU accounted for 66 percent of service exports and 56 percent of service imports.

International service trade involves a wide variety of services. In 2016, around half the value of this trade – both imports and exports – consists of telecommunication, computer and information services as well as other business services. In addition, imports often concern royalties (19 percent), for example payments for the right to use intellectual property. In exports, transport services occupy third place with a share of 19 percent. The share of royalties in the export value amounts to 13 percent.
The growth of the international trade in services recorded in 2015 was mainly related to a peaking trade in royalties that year. This trade levelled off again in 2016.

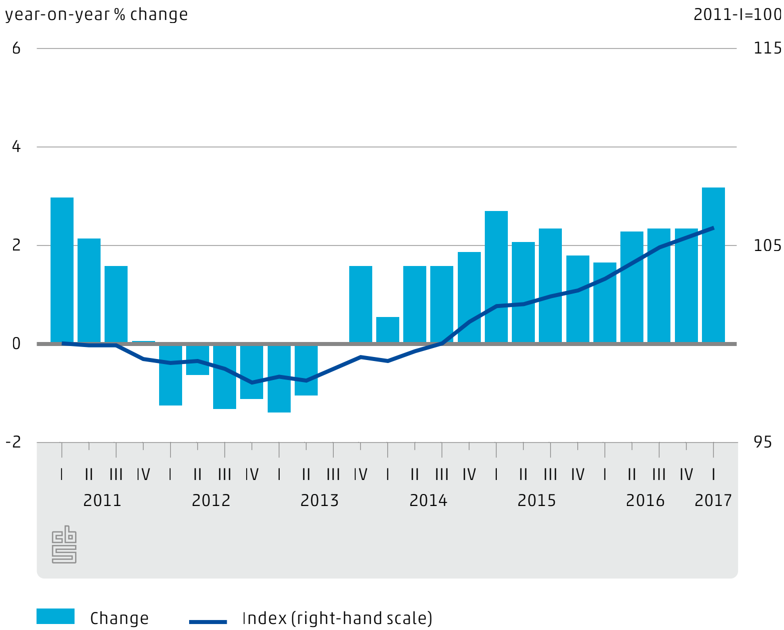
2.38 Import and export value of services



2.39 International trade in services, 2016*



2.40 Size of the economy

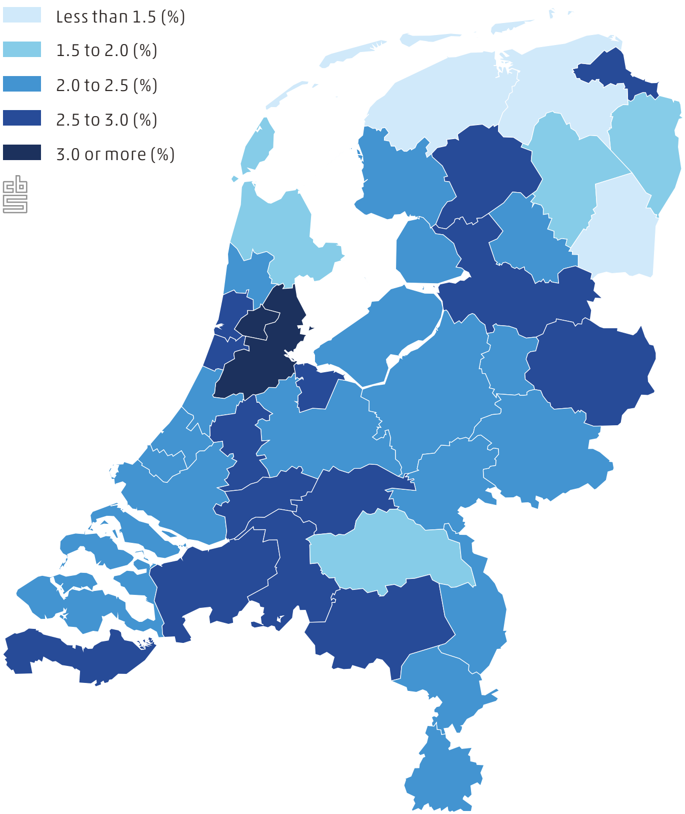


Macroeconomic trends

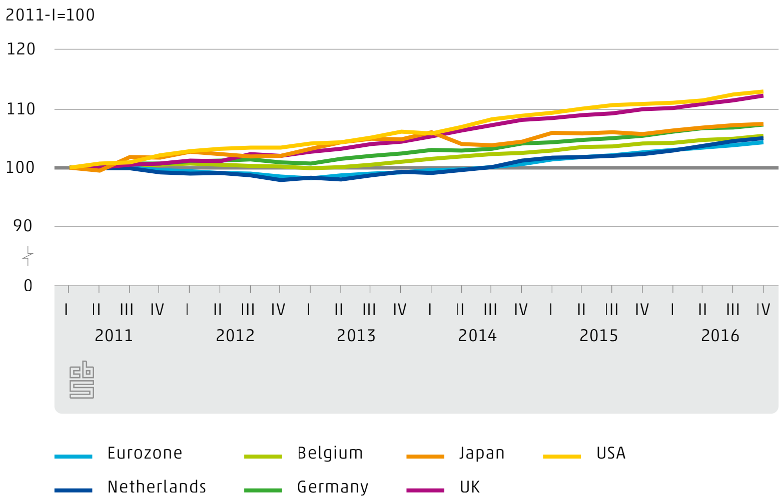
Measured by gross domestic product (GDP), the Dutch economy grew by 2.2 percent in 2016, a slightly higher rate than in 2015. This is the highest growth rate since the onset of the economic crisis in 2008. Major contributors to this growth were domestic spending, investments and consumption. Unlike in 2015, the balance of trade (the difference between exports and imports) was also positive in 2016.

Some regions perform better than others. Amsterdam and the Zaanstreek and Haarlemmermeer areas achieved strong growth at 2.9 percent or more in 2016. While Amsterdam benefited from an increase in renting and other real estate activities, growth in the Zaanstreek was due to the food industry. The Haarlemmermeer area flourished thanks to the presence of Schiphol airport. The city of Utrecht saw slower growth (2.3 percent) owing to contraction in the financial sector. The growth rate of Rotterdam's local economy (2.3 percent) was affected by a decline in the transport and storage sector.

2.41 Regional economic growth, 2016*

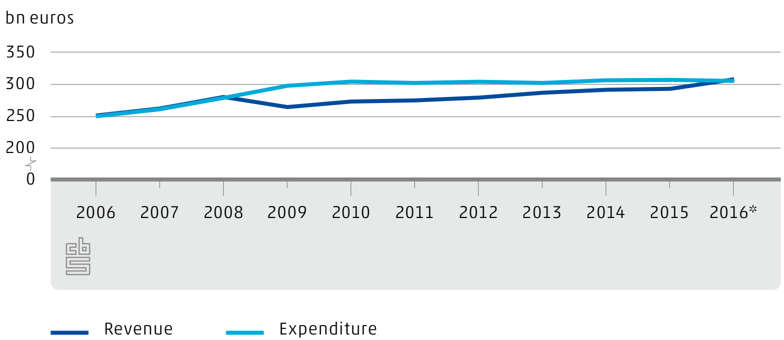


2.42 Economic growth



Source: Eurostat

2.43 Public revenue and expenditure

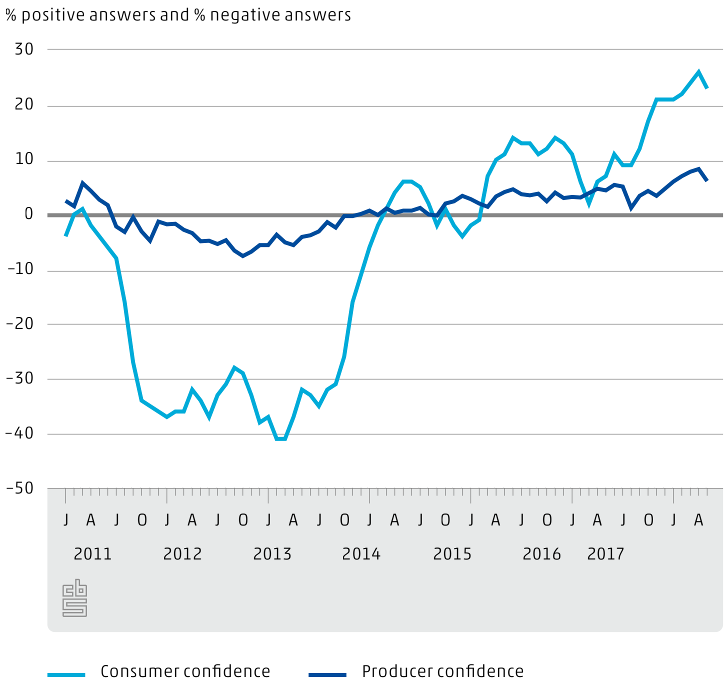


In 2016, the Dutch economy grew at a higher pace than the average across the European Union (1.8 percent). The Netherlands' national GDP growth (2.2 percent) exceeded growth in Germany (1.9 percent) and the United Kingdom (1.8 percent). GDP growth was also lower in Belgium (1.2 percent) and in France (1.1 percent).

In 2016 revenues from taxes and national insurance contributions increased by over 17 billion euros. VAT revenues rose by nearly 4 billion euros, and the private sector paid nearly 5 billion euros more in corporate tax. The wage and income tax including social insurance contributions was nearly 7 billion euros higher. Public expenditure saw a slight decline, partly due to the 3 billion euro reduction in contributions to the European Union which took effect over the last few years.
The interest burden dropped by around 1 billion euros due to historically low interest rates and decreasing debt. In 2016, the government had a general surplus revenue for the first time since 2008, to the amount of 2.9 billion euros or 0.4 percent of GDP.

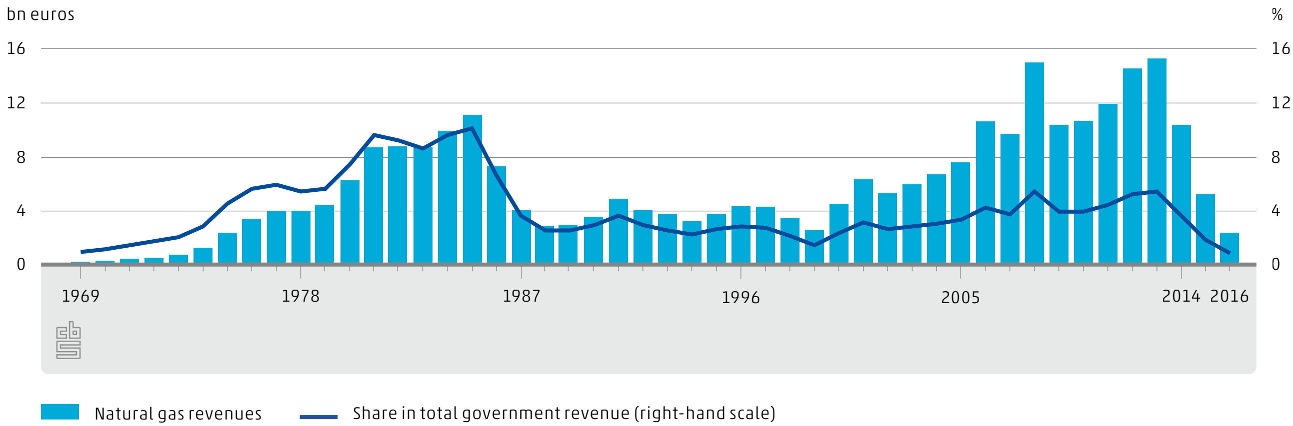
Consumer confidence improved further in 2016. It declined over the first few months of the year but then recovered rapidly, reaching the highest level in over nine years by the end of 2016. Consumers considered it a favourable time to make large purchases and were positive about their own financial situation over the next 12 months, leading to increased consumer spending in 2016. Q4 growth in consumer spending was the highest in nine years. Producer confidence already improved in the first half of 2016, reaching its highest level in over five years in June. This was followed by a drop but then a rebounce, ending at levels similar to the spring of 2016 by December. The positive mood among producers is in line with output levels in the manufacturing industry.

2.44 Confidence



In 2016, natural gas extraction generated 2.4 billion euros in government revenues. This is nearly 13 billion euros lower than in 2013 and the lowest level since 1975. Natural gas revenues contributed 0.8 percent to total government revenue, the lowest share since 1969.
The fall in natural gas revenues over the past few years has partly been the result of cuts in the natural gas production. The adverse affects of gas extraction in Groningen province have led the government to downward adjustment of the gas production ceiling.
The annual volume of extraction from gas fields in the Dutch part of the North Sea has also decreased steadily. The decline in government revenues from natural gas extraction is furthermore the result of lower prices.

2.45 Natural gas revenues

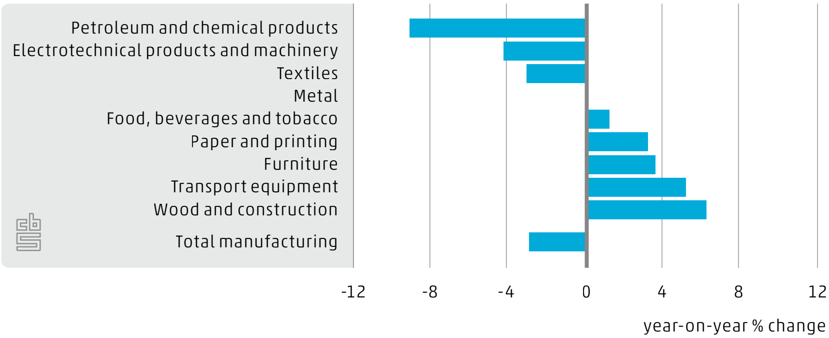


Manufacturing

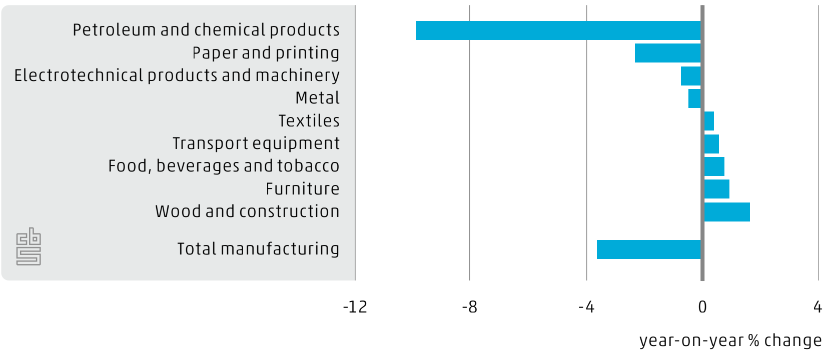
After falling turnover figures in nine consecutive quarters, manufacturing turnover rose by 1.1 percent in Q4 2016 year-on-year. The sharpest rise was recorded in the furniture industry: 8.2 percent. Turnover growth in the industries producing petroleum derivatives, chemicals, pharmaceuticals, and rubber and plastic products contributed to the upward trend in the industry as a whole. Despite the increase in Q4, manufacturing turnover decreased by 2.9 percent in 2016.

Output prices in industry were 2.5 percent up in Q4 2016 year-on-year. The OPEC agreement was responsible for price increases in the petroleum industry. Furthermore, prices went up in the industries producing (basic) metals, food and chemical products as well as in the automotive industry. The sharpest price drop was seen in the electrotechnical and machinery industries: 2.9 percent. On an annual basis, however, prices dropped by 3.6 percent.

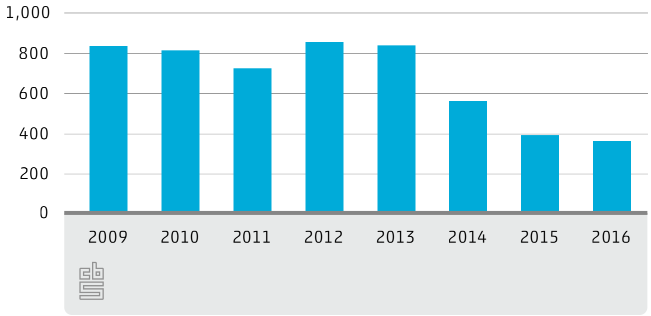
2.46 Turnover in manufacturing industries, 2016



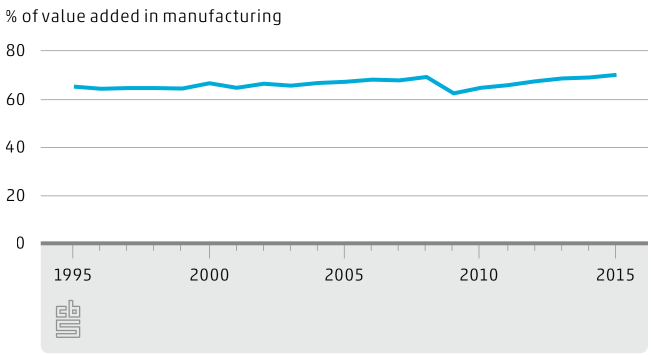
2.47 Output prices in manufacturing, 2016



2.48 Bankruptcies in manufacturing



2.49 Industrial products sold abroad



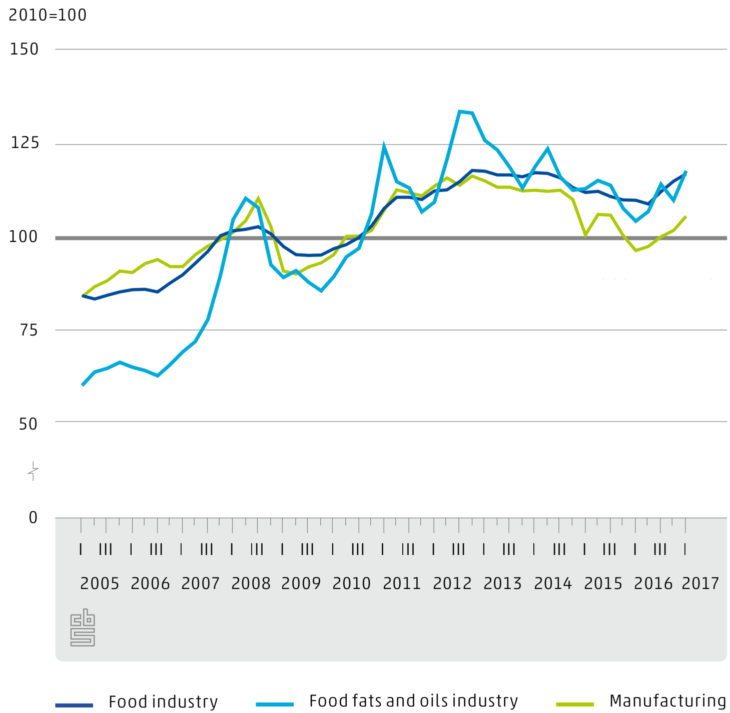
The number of pronounced bankruptcies in manufacturing has fallen considerably since 2013. In that year, 839 businesses went bankrupt versus only 365 in 2016, representing a decrease of 56.5 percent.

Out of every one euro earned by the Dutch manufacturing industry, 70 euro cents are generated by exports. In 2015, manufacturing added over 71 billion euros in value, of which nearly 50 billion euros were on account of exports. The chemical industry is 92 percent dependent on foreign markets. By contrast, the furniture industry is much more focused on domestic demand. Its export dependence amounts to 29 percent. Germany, Belgium, the United Kingdom, France, the United States and Italy were the most important export destinations in 2015, similar to 2006. China occupies seventh place and is a key runner-up. China’s share in the manufacturing industry’s total export earnings has increased from 1.3 to 2.9 percent since 2006.

Prices

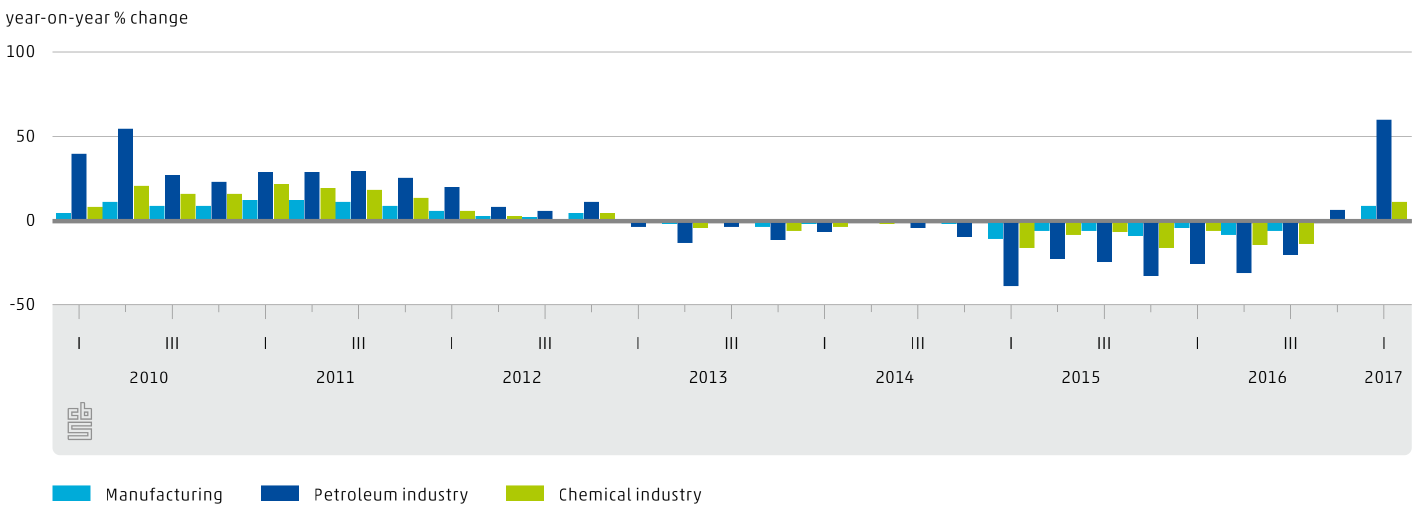
In the period January 2005-December 2016, manufacturing prices rose by more than 25 percent while prices in the food industry increased by nearly 40 percent. Within the food industry, the sharpest price rise relative to January 2005 was in edible oils and fats with 96 percent.

2.50 Producer prices in manufacturing



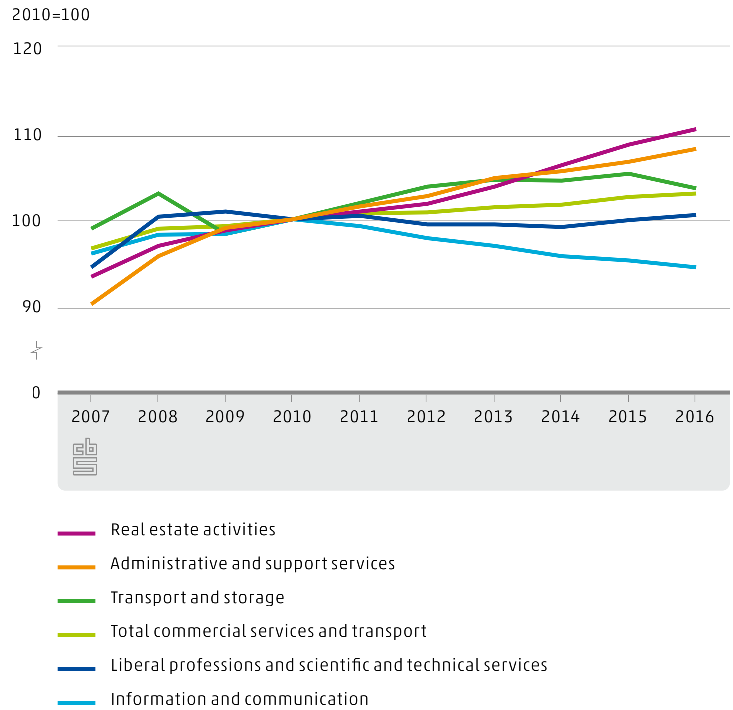
At the beginning of 2017, producer prices started picking up again in nearly all sectors after a four-year decline. This trend was mainly determined by price developments in the petroleum industry, which recorded a year-on-year increase of 60 percent in the first quarter. Chemical industry prices rose by 12 percent year-on-year. Prices of chemical products are greatly influenced by price changes in the petroleum industry.

2.51 Producer prices

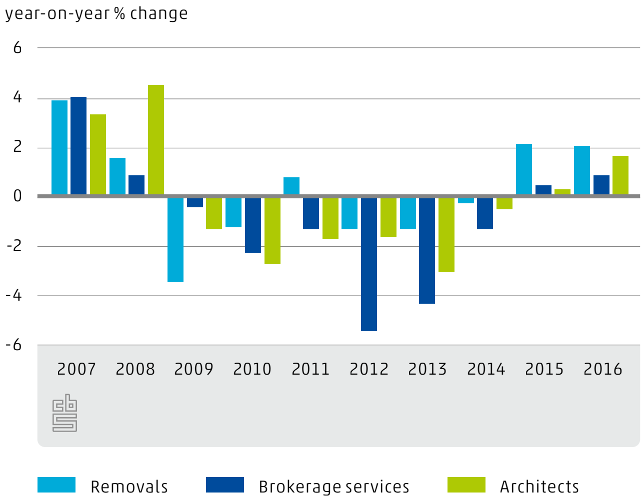


In 2016, prices of services rose by 0.4 percent on average relative to one year previously. The average price level was therefore over 6 percent higher than in 2007. Not all services became more expensive; prices fell in some market segments within the transport and storage sector as well as the information and communication sector.

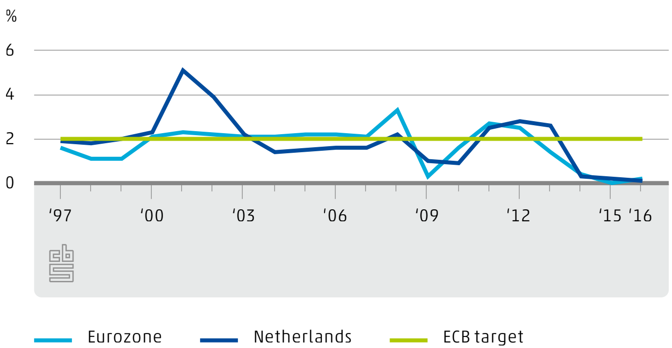
2.52 Prices of commercial services and transport



2.53 Prices of real estate related services



2.54 Consumer price changes in Europe (HICP)



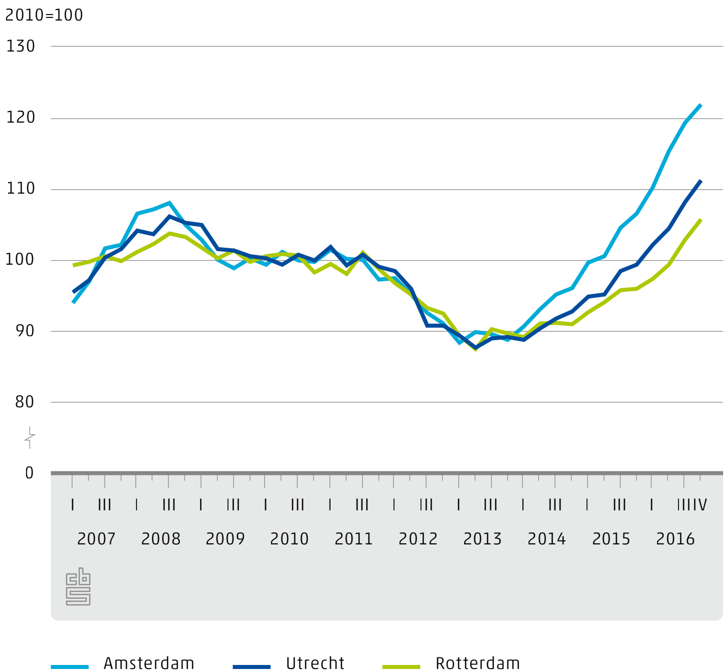
Source: CBS, Eurostat.

In 2016, prices of real estate services increased by 1.9 percent on average, a sign of sustained recovery as of 2015. The malaise on the residential and commercial property markets was felt by all service providers in the years after 2008: movers, real estate agents and architects all suffered from falling prices. Real estate agents experienced the strongest decline at 12 percent relative to 2007. Only removal services have more or less returned to their pre-crisis price levels.

CPI inflation in the Netherlands according to the Harmonised Index of Consumer Prices (HICP) averaged 0.1 percent in 2016, the lowest inflation rate since 1997. Eurozone inflation amounted to 0.2 percent on a yearly basis. The European Central Bank (ECB) uses this information to make monetary policy decisions. In the pursuit of price stability, the ECB aims at maintaining inflation rates below, but close to, 2 percent over the medium term.

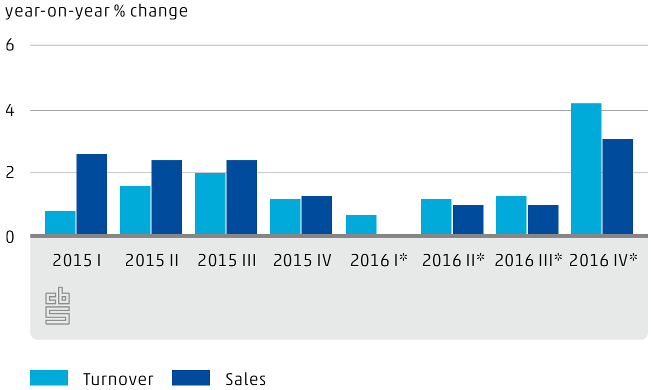
In 2016, prices of existing owner-occupied dwellings were on average 5 percent up from 2015. General price levels on the markets for existing homes in Amsterdam, Utrecht and Rotterdam have already surpassed pre-crisis levels. House prices reached a record high in August 2008, followed by a record low in June 2013 and an upward trend since then.
In 2016, 215 thousand dwellings were sold, the highest number of transactions since 1995. These transactions involved a record amount exceeding 52 billion euros.

2.55 Price changes existing owner-occupied dwellings

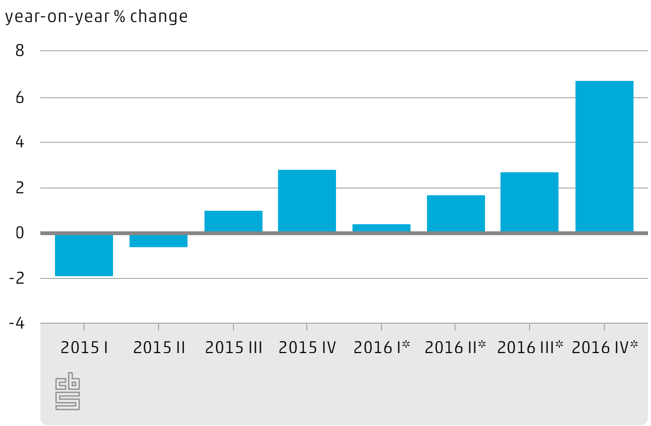


Source: CBS, Kadaster.

2.56 Turnover in retail trade



2.57 Turnover in wholesale trade



Trade, hotels and restaurants

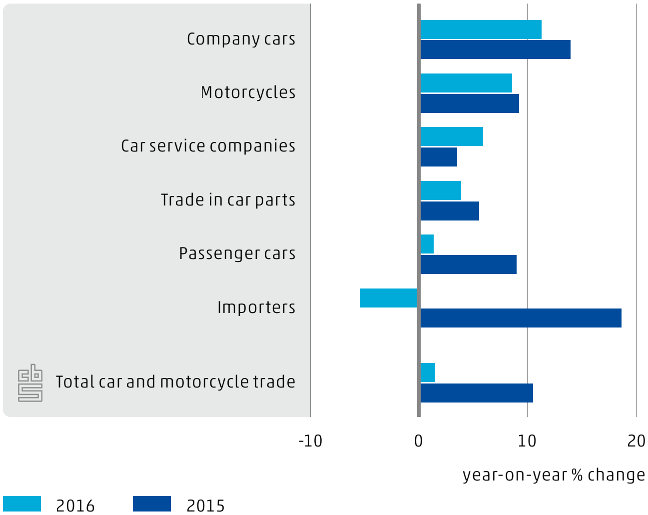
Retail trade posted a turnover growth of 1.9 percent and a growth in sales volume of 1.4 percent in 2016. It was the third consecutive year of turnover growth and represented the highest increase ever recorded. Nevertheless, turnover was still 4 percent below the highest level on record before the crisis (2008). The strong growth in 2016 can be attributed to an outstanding fourth quarter, when turnover rose by 4.3 percent.
The volume of sales surged as well by 3.2 percent. Quarterly growth figures of this size were realised in retail trade around ten years ago. Non-food retail in particular performed well; consumers spent large amounts in clothes, DIY and furniture shops. For grocery stores and online shops, turnover grew strongly as well relative to the previous quarters.

Turnover in wholesale trade continued to grow in 2016, by 2.9 percent year-on-year. In Q4, turnover growth even reached 7.0 percent. Virtually all sectors recorded more turnover at year-end. The highest peaks were seen in the

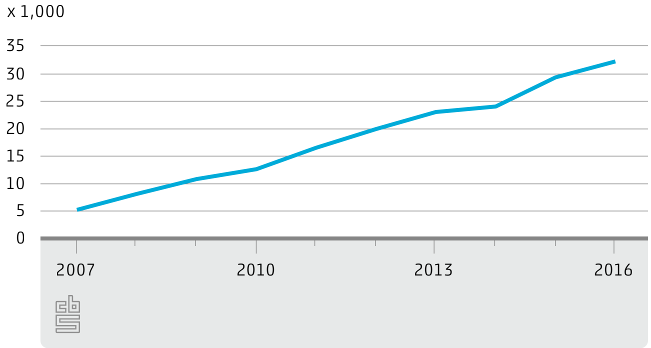
raw materials sector, trade in non-food retail (especially sporting goods), metal goods (+18.8 percent) and heating equipment (+8.4 percent).
On the other hand, trade in ICT equipment showed a different development and recorded a turnover decline of nearly 2 percent.

Turnover in the car and motorcycle trade was up by nearly 2 percent in 2016 relative to the previous year. Passenger car trade recorded a slight turnover increase, despite falling sales of new cars. Other sub-sectors of the car industry did achieve considerable turnover growth in 2016, especially trade in company cars (+11 percent) and motorcycles (+9 percent). Car service points and auto part suppliers recorded growth as well. Growth figures in 2016 were even the highest since 2002.

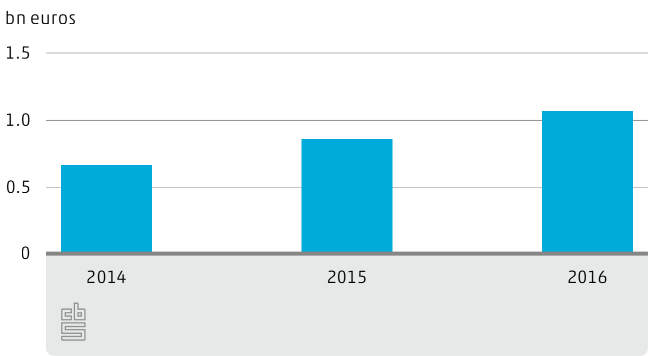
2.58 Turnover in car and motorcycle trade



2.59 Number of webshops



2.60 Dutch consumer purchases in EU webshops



The number of retail shops has dropped by 4.4 percent over the past decade. There are mainly fewer shops selling DVDs and CDs, photo cameras as well as baby and children's clothing relative to 2007. On the other hand, the number of online retailers has increased fivefold in this period.
In 2016, there were over 95 thousand brick and mortar shops in the Netherlands, down from 100 thousand in 2007. Many computer shops and shops selling small electronic equipment, such as DVD and CD players, have disappeared with a 20 percent decline since 2007.
The number of clothing shops fell by 5 percent, while the number of telephone shops has risen by 37 percent since 2007. The number of department stores, fishmongers and second-hand shops rose by more than 30 percent. Clothing shops nowadays represent the majority of all brick and mortar shops.

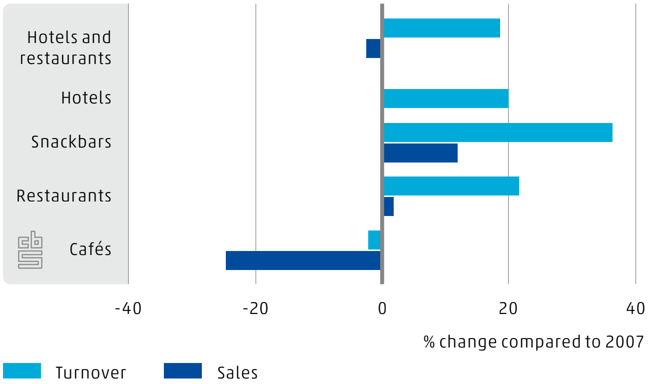
In 2016, Dutch consumers bought over 1 billion euros worth of goods through EU webshops: a 25 percent increase compared to 2015. They mainly bought clothing items and shoes. German webshops topped the list with a share of more than 50 percent in total related

purchasing value. Great Britain ranked second at around 12 percent, followed by Belgium and Italy at approximately 8 percent each. The other 20 percent was spent in webshops from across the entire European Union.
Online purchases are those which are made by Dutch consumers from companies located within the European Union but outside the Netherlands.

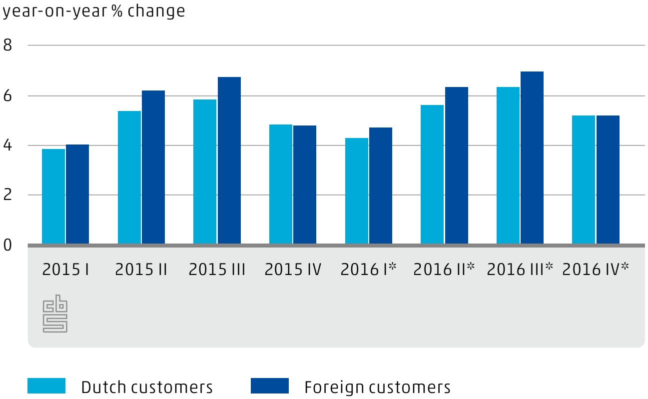
In 2016, hotels and restaurants recorded the strongest turnover growth in ten years, namely 6.5 percent. This represents an increase of 18.7 percent relative to 2007. The strongest turnover growth was realised by snackbars (+36.6 percent), followed by restaurants (+21.9 percent) and hotels (+20.1 percent). However, turnover declined for cafés by 2 percent in 2016 relative to 2006. The sales volume declined by nearly 25 percent as prices rose steeply (nearly 30 percent).

Snackbars, which include fast-food chains, food delivery services, lunchrooms and ice cream parlours, realised nearly 10 percent more turnover growth in 2016, the highest annual growth since 2006. The volume of refreshments

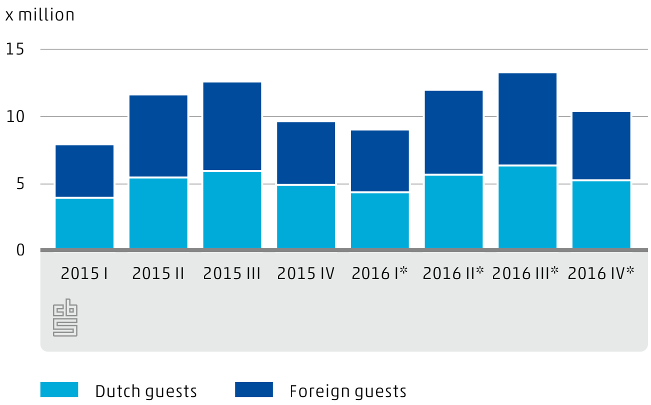
2.61 Turnover hotels and restaurants, 2016



2.62 Turnover in the fast food industry



2.63 Nights spent in hotel accomodation



sold accounted for 7.5 percent of this growth. These sales have risen again (substantially) since Q1 2015.

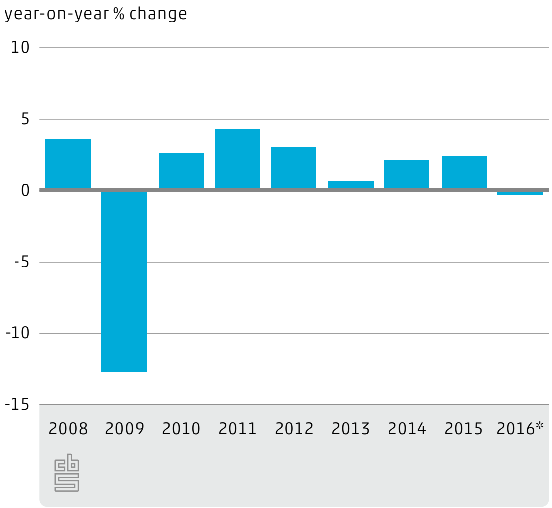
The number of overnight stays at hotels went up by 3 million in 2016, from 41.6 million (2015) to 44.6 million (2016). The increase in overnight stays was almost equally divided between Dutch guests and foreign guests.

Transport

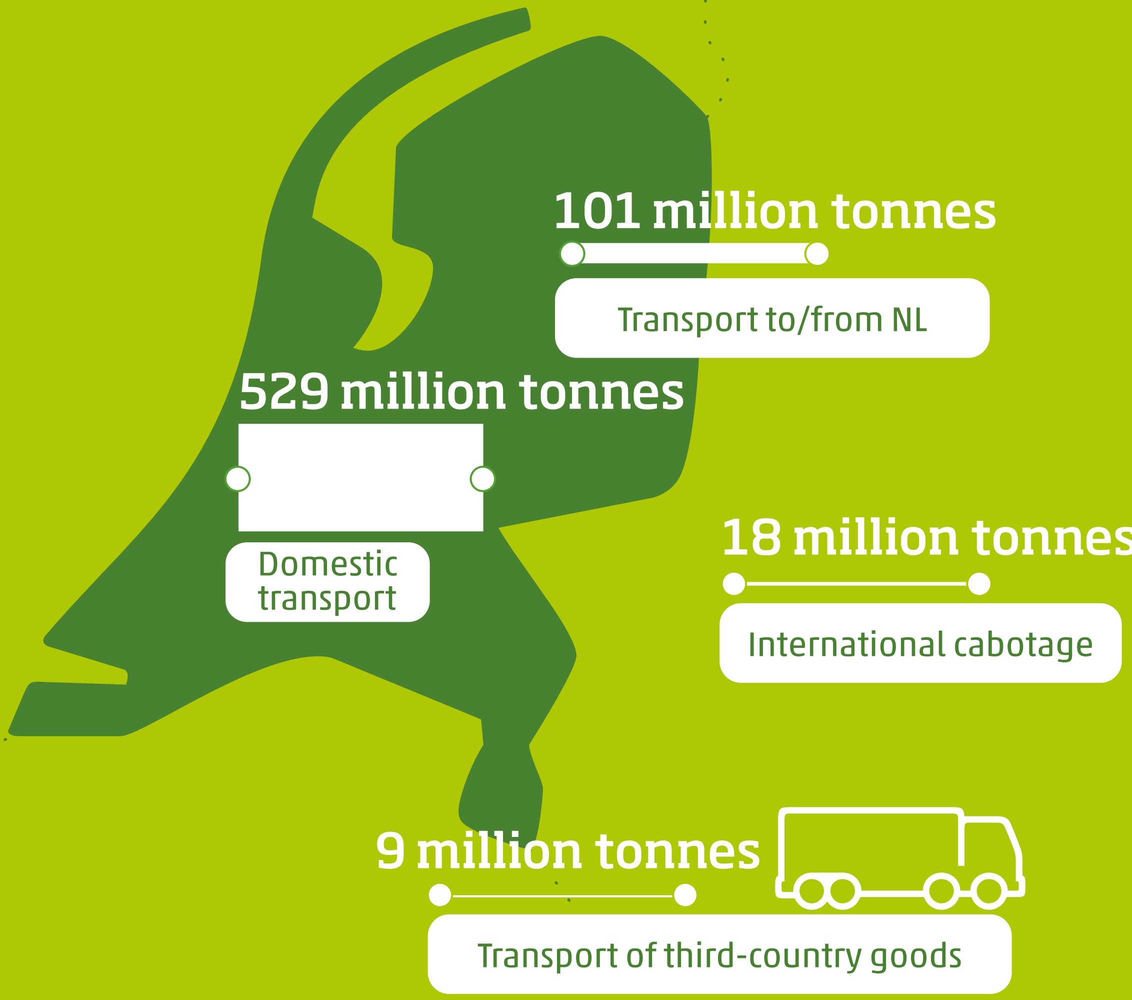
In 2016, Dutch transport companies recorded a 0.3 percent decline in turnover relative to the previous year. It was the first decline in turnover since 2009. While turnover fell in waterway transport and aviation, it rose instead in haulage (including rail and road transport). The strongest turnover growth in 2016 was recorded by removal and courier companies.

Dutch lorries carried 657 million tonnes of goods in 2016, 2.5 percent up from one year previously. The rise was entirely on account of domestic transport (+4%), while international road transport declined by 3.3 percent in 2016. Half of all goods in road transport are agricultural and food products or building materials.

2.64 Transport sector turnover



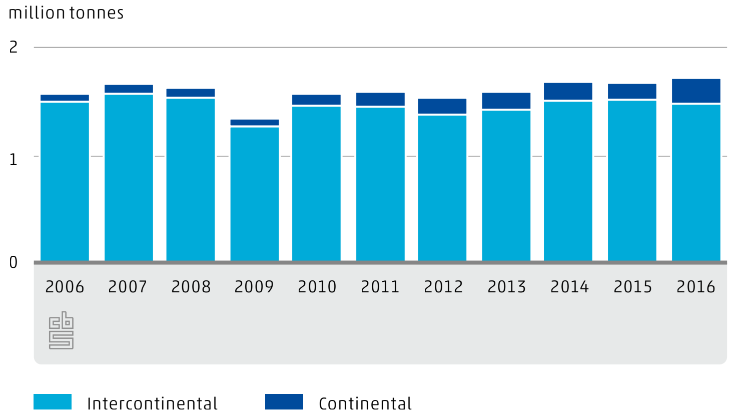
Transport by Dutch freight vehicles in 2016



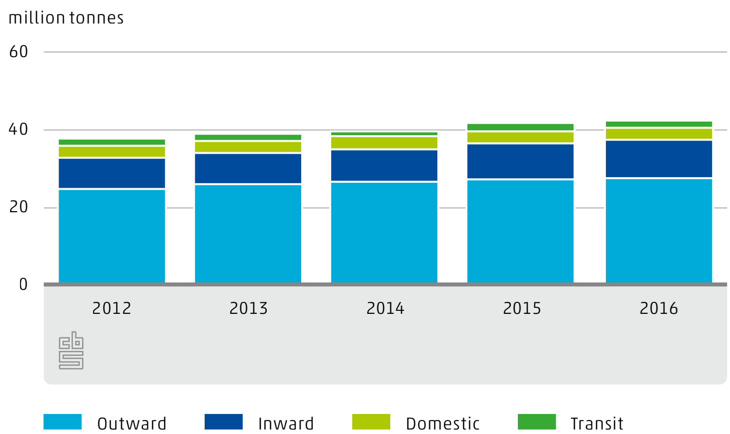
Last year, the total volume of freight transport to and from Dutch airports grew again after a slight decrease in 2015. This growth was confined to transport within Europe. Intercontinental freight transport saw a 2.4 percent volume decline in 2016. Air cargo transport is predominantly intercontinental (86 wpercent), although this share has declined continually over the past few years.

The volume of goods carried by railway hauliers in 2016 exceeded 42 million tonnes. This represented an increase of 4.5 million tonnes over 2015. Railway transport has grown steadily since 2012, entirely on account of international transport. Between 2012 and 2016, outward transport grew by more than 11 percent and inward transport even by 20 percent.

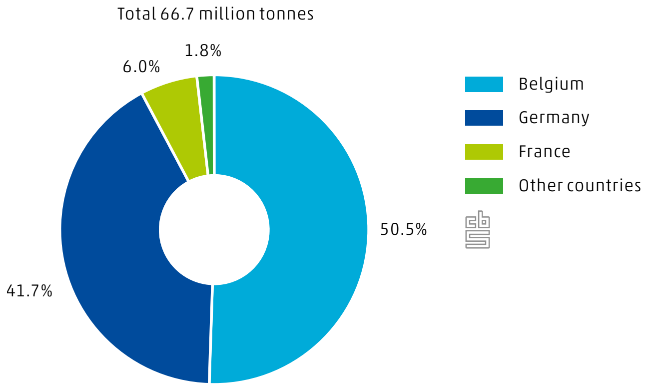
2.65 Air freight transport



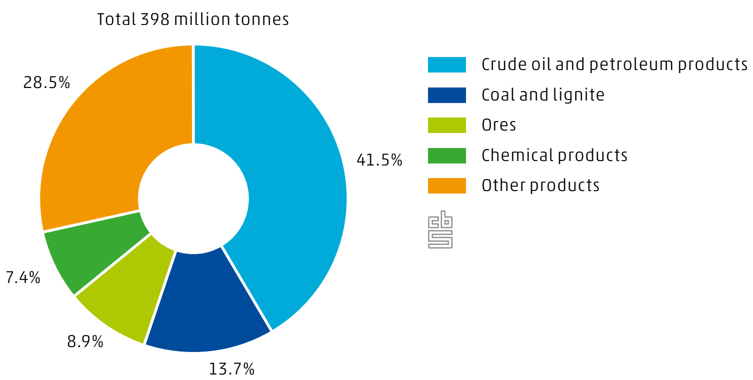
2.66 Rail freight transport



2.67 Inward shipping, 2016



2.68 Goods unloaded at seaports, 2016



In 2016, inland shipping companies carried 366 million tonnes in goods. Inward shipping accounted for 66.7 million tonnes; over 90 percent of these goods were transported over rivers from Belgium or Germany. Inward shipping from Belgium mainly consists of refined petroleum products. Shipments from Germany mainly include container goods and minerals such as sand and gravel.

After a three-year increase, the volume of goods unloaded at Dutch seaports declined in 2016 to 398 million tonnes, for example 2 percent less than one year previously. The bulk of goods unloaded at Dutch ports were crude oil and petroleum products with a volume of 164 million tonnes, representing a year-on-year decline of almost 3 percent. Another year-on-year decline among unloaded goods that year was in coal transport (–5 percent).


TRAINING
DE BOER

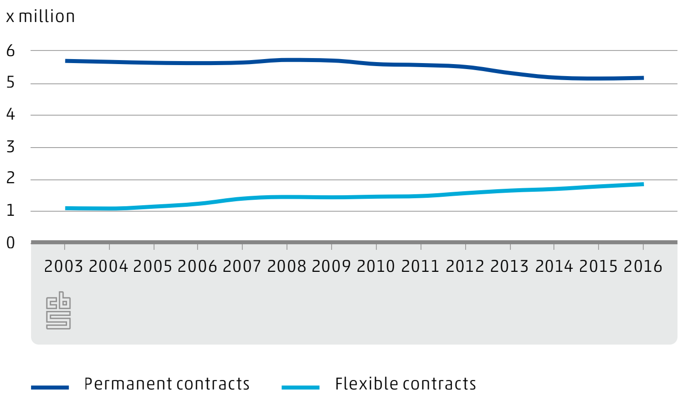
3. Labour and income

Trends

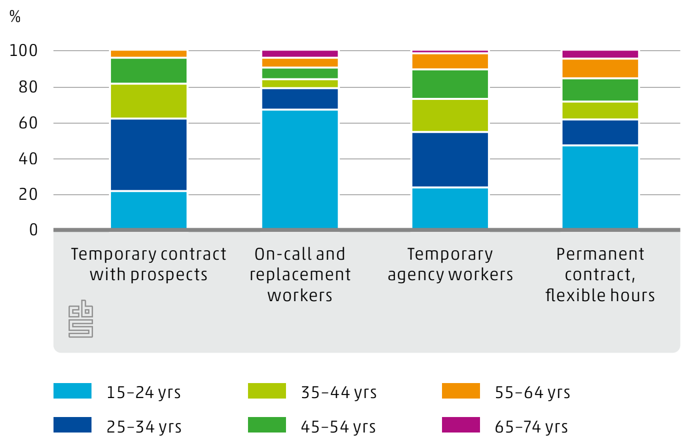
Flexible employment
Flexible forms of work are on the rise in the Netherlands. In 2016, more than 1.8 million people – i.e. over one-fifth of the Dutch labour force – were in flexible employment, up from merely 1.1 million in 2003. Between 2003 and 2016 the number of on-call (standby) and replacement workers even more than doubled, while the number of permanent workers declined from nearly 5.7 million (2003) to just over 5.2 million (2016).

Flexible arrangements offer employers the possibility to hire more staff during peak demand and reduce personnel costs in less favourable times. Employees themselves may also regard flexible arrangements as positive. One-third of 'flex workers' indicate they prefer flexibility or have no need for job security. However, the majority of flex workers state they have no other choice: they were hired recently by their employer (38 percent) or have not been successful in securing permanent work (30 percent). The disadvantages of flexible employment are a greater lack of employment and income security compared to a permanent contract; a lower income on average, compared to permanent employees; as well as highly variable income levels on average depending on type of contract. This variability is related to differences in number of hours worked, age, educational attainment level and branch of industry (other factors not precluded).

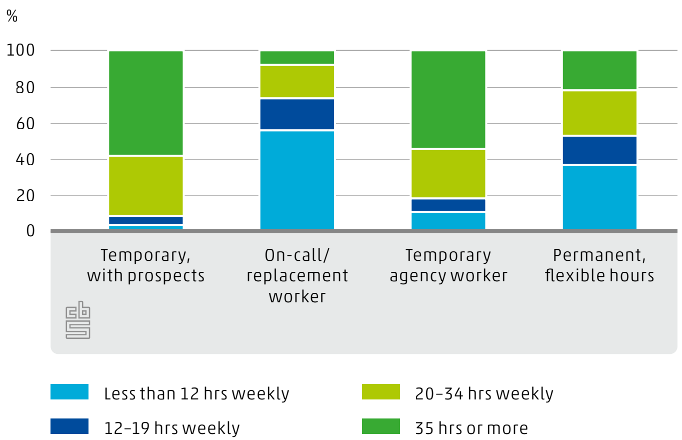
3.1 Employees

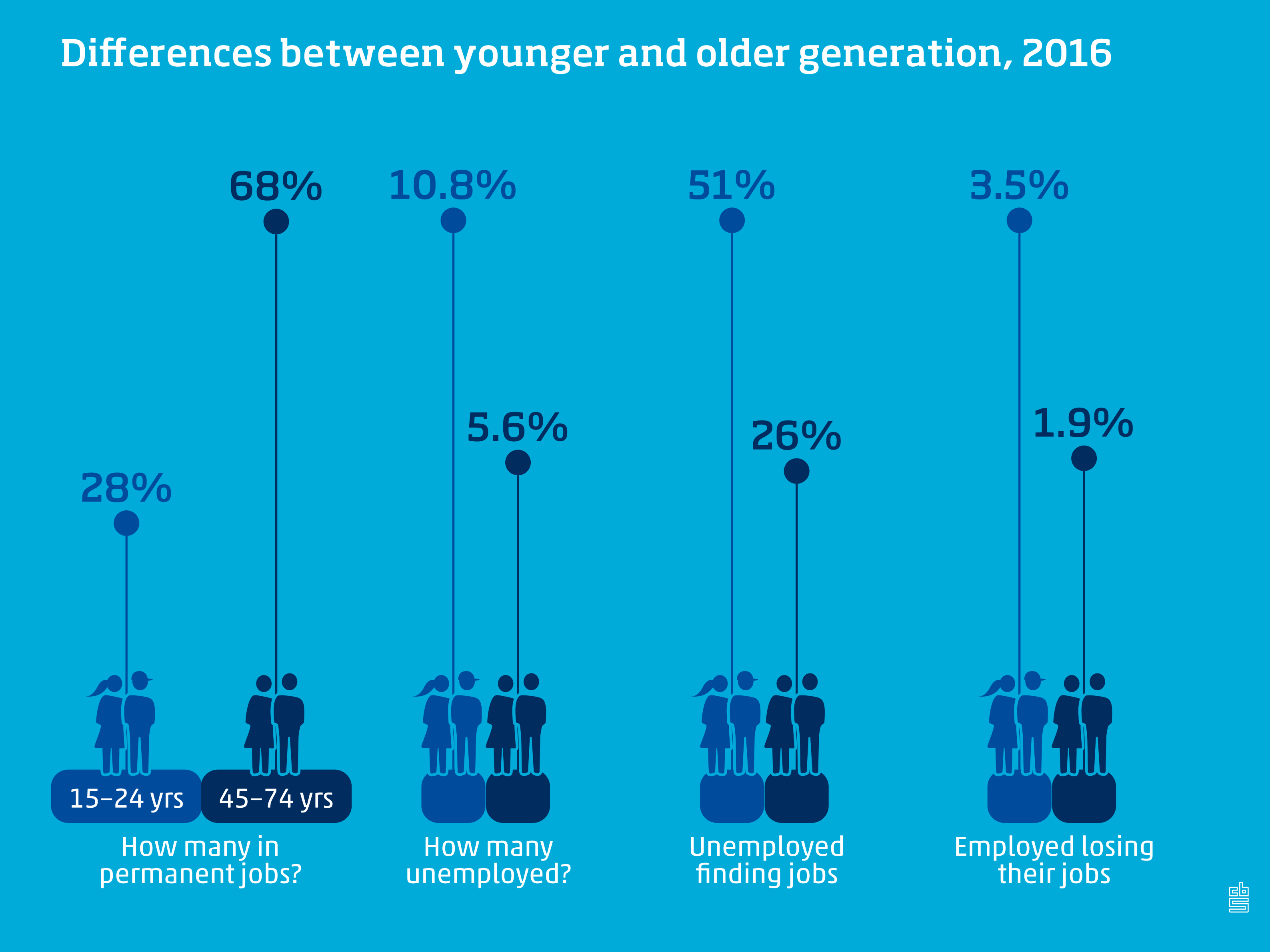


3.2 Flex workers, by age, 2016



3.3 Flex workers, weekly working hours, 2016



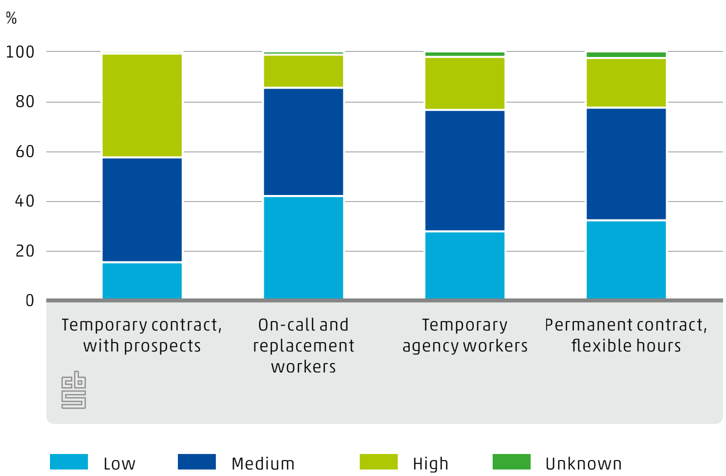

Differences between younger and older generation, 2016
28%
68%
15–24 yrs
45–74 yrs
How many in permanent jobs?
10.8%
5.6%
How many unemployed?
51%
26%
Unemployed finding jobs
3.5%
1.9%
Employed losing their jobs

Who are these flex workers?

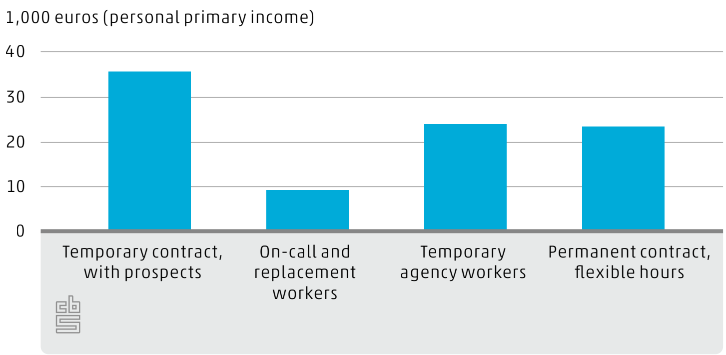
Flex workers are defined as people who have either a fixed-term contract or flexible hours. This group comprises seven different categories: temporary employees with prospects for permanent employment and a fixed number of hours; temporary employees with a fixed-term contract for 1 year or more and fixed hours; temporary employees with a fixed-term contract for less than 1 year and fixed hours; on-call and replacement employees; workers hired through temporary employment agencies; permanent employees with flexible hours; and temporary employees with flexible hours. This chapter highlights four of the categories which are more easily distinguished due to differences in age, educational attainment and working hours:

1. Temporary employees with prospects for permanent employment and fixed hours are often relatively young (25 to 35 years) and highly educated. They mostly work full time.
2. Permanent flex workers with flexible hours: this group has an equal male/female ratio. Almost half are under the age of 25, over half are no longer in education. They are relatively often employed by small trading companies and in the hotel and restaurant sector. Slightly under 54 percent work less than 20 hours per week.
3. Among workers hired through temporary employment agencies, the share of male workers (62 percent) and the share of workers with a non-western background (31 percent) are relatively high. They are often middle-aged, while half are medium-skilled workers. Over half work full time and 63 percent work for a large company, often in manufacturing or construction.
4. The group on-call and replacement workers includes 67 percent young people (15 to 25 years). Six in ten are in either secondary or tertiary education. Over half work less than 12 hours per week. Compared to other flex workers, relatively many work in the hotel and restaurant sector, in trade and in the care sector.

3.4 Flex workers, education levels, 2016



3.5 Flex workers, average income levels, 2015



Gross wages much lower than when permanent

Temporary employees with prospects for permanent employment are the highest-earning among all flex workers. The average gross annual income from labour is 35.8 thousand euros (2015). This income is still almost 30 percent lower than among permanent employees (50.8 thousand euros). Measured by income level, the second highest-earning are temporary agency workers (24.1 thousand euros) and permanent employees without fixed hours (23.4 thousand euros). On-call workers are the lowest earning by far at 9.3 thousand euros annually.

Income is determined by multiple factors including age, educational attainment level, seniority and sector of industry. The number of hours worked determines income to a great extent, of course. Among flex workers who work full time, the permanent employees without fixed hours earn most at an average 64.1 thousand euros, but income differences are relatively minor when they are compared to the other types of contracts. The lower pay for on-call employees can be explained by looking at all these factors: they are often young (half are in secondary or tertiary education), most work part time and less than 20 hours per week, and they often work in lower-earning sectors such as retail trade and the hotel and restaurant sector. The highest earning flex workers tend to be the full time employees. Their age is also higher on average than most other flex workers. The factors listed above – which partly determine annual income – are not exhaustive. Another important factor is occupation, while some flex workers are out of work for part of the year.

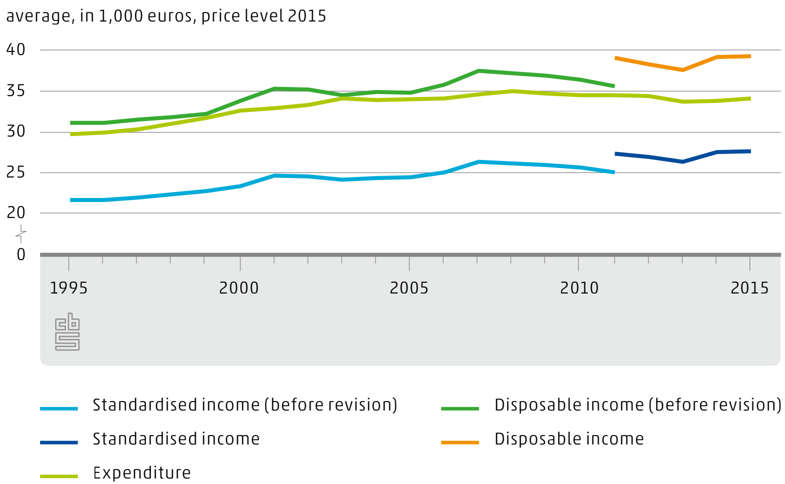
Few on-call and replacement workers are economically independent

Due to the fact that flex workers have (much) lower income levels than permanent employees, they are much more likely to be economically dependent. No more than 20 percent of the on-call and replacement workers are able to support themselves financially. This group includes many young students. Even when these students are excluded, only 35 percent of on-call and replacement workers are financially independent.

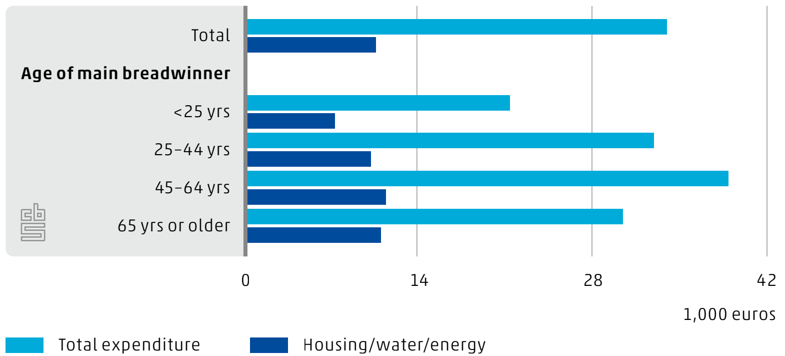
Temporary workers with flexible hours at higher risk of poverty

Someone's financial situation may not only depend on his or her own income, but also the income of a partner or other family member. Even with a second income, those in flexible employment are at risk of poverty. Over 6 percent of flex workers are members of a low-income household, versus 2 percent of permanent employees. In other words, half of all employees living in low-income households are flex workers.

3.6 Labour and income



3.7 Household expenditure, 2015*



Figures

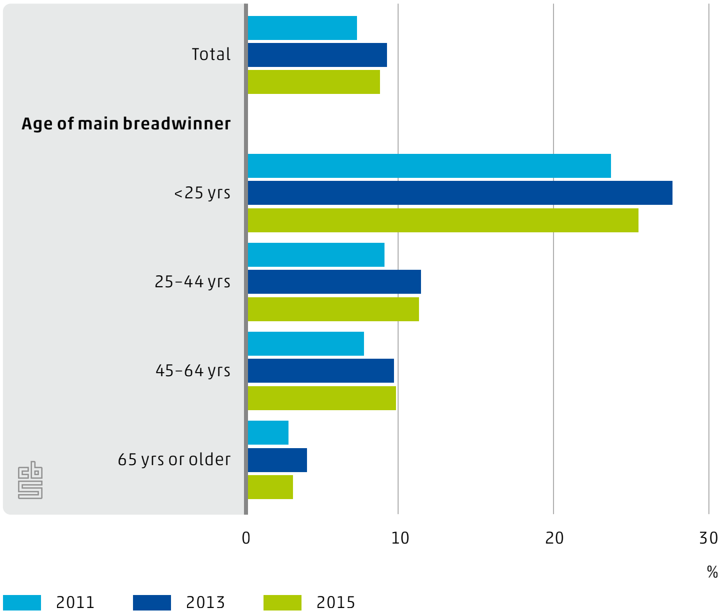
Income and expenditure

The average standardised household income for 2015 was virtually the same as for 2014. Income rose during most of the period 1995–2008, except between 2001 and 2005 when the economy deteriorated. Due to the recent economic crisis, income fell in each year between 2008 and 2013 (aside from a trend break in 2011). Household expenditure (adjusted for inflation) rose from nearly 30 thousand euros in 1995 to 34 thousand euros in 2015.

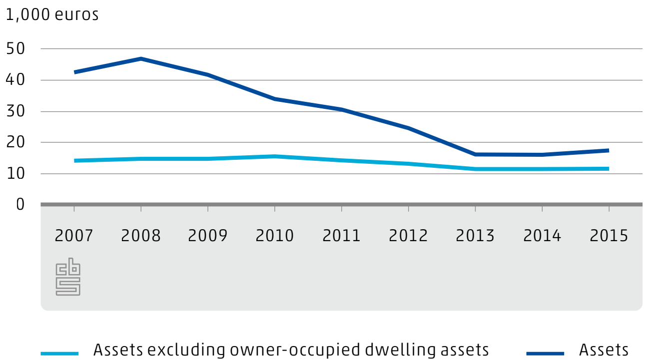
Average household spending amounted to 34 thousand euros in 2015. Over 31 percent was spent on housing costs. Households with a main breadwinner between the ages of 45 and 64 had the highest spending, as these are generally the largest households with an average size of 2.4 persons.The youngest households, with an average size of 1.4 persons also the smallest households, spent the least.

In 2015, nearly 9 percent of households (626 thousand) had to survive on an income below the low-income threshold, facing the risk of poverty. This percentage is slightly lower than in 2013 but higher than in 2011. The risk of poverty was reduced among young and old between 2013 and 2015 while it remained unchanged among 25 to 64-year-olds. In 2015, 3.3 percent of households had been on a low income for at least four years.

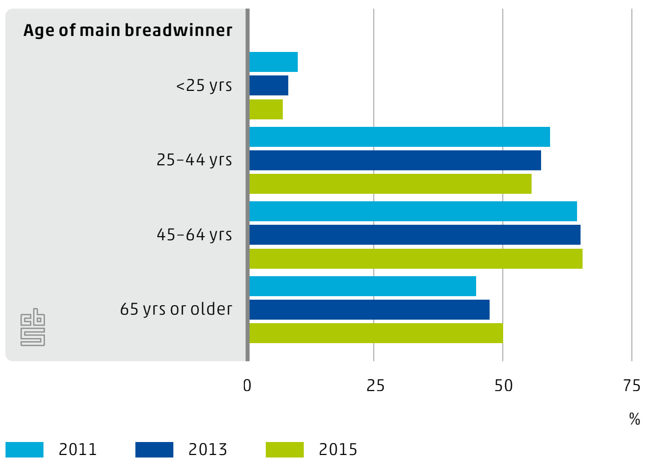
3.8 Low-income households



3.9 Median household wealth, 1 January



3.10 Home ownership rates

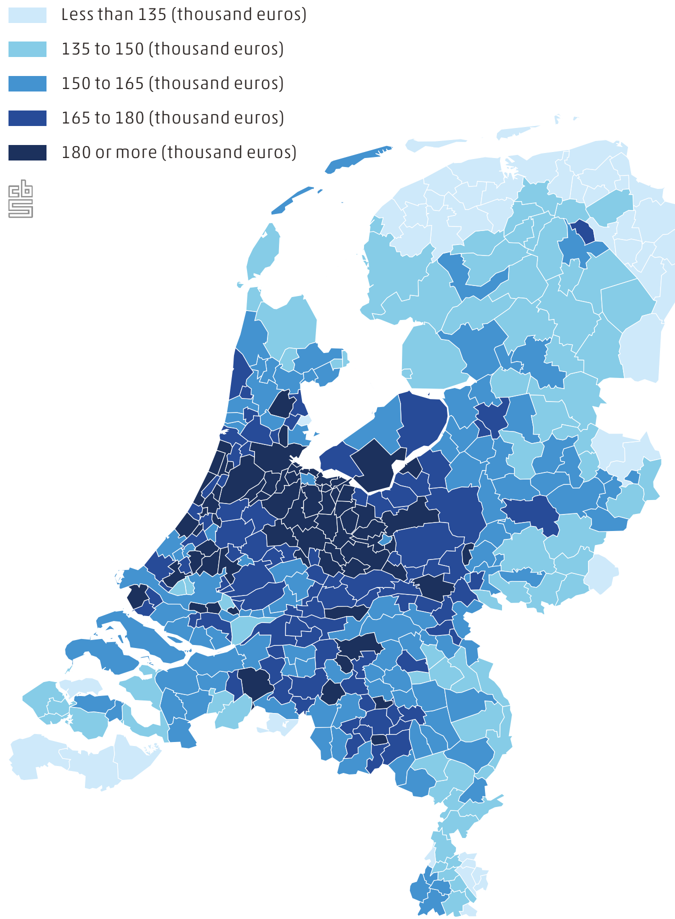


Median household wealth in the Netherlands picked up again in 2015 for the first time since the outbreak of the economic crisis in 2008. The total net worth of households – for example total assets minus total liabilities – increased, mainly as a result of rising house prices. If people's own homes are left out of the equation, net worth in 2015 was just as high as in 2014.

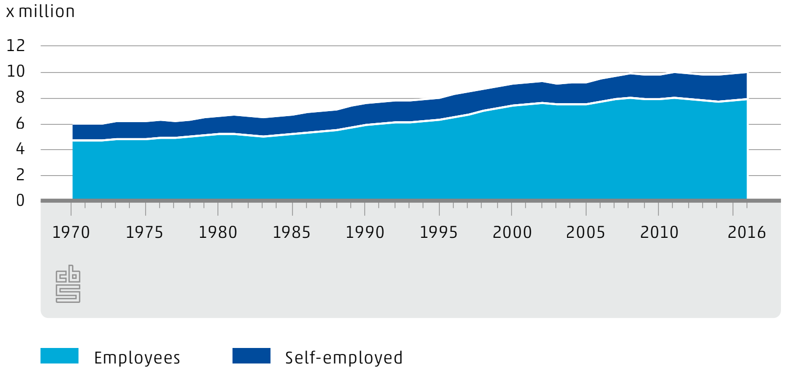
In the period 2011–2015, the home ownership rate declined among the youngest age group (the under-25s) as well as in the age group 25 to 44 years. The economic crisis posed obstacles for (first-time) home buyers. However, home ownership did increase among households with a main breadwinner aged 65 or older, up to 50 percent in 2015. This is mainly due to the influx of post-war baby-boomers into the group of over-65s, as they are often already home-owners.

In 2015, home owners in Rozendaal (Gelderland province)had the highest average mortgage debt nationwide at 295 thousand euros. Average mortgage debt was more than 250 thousand euros as well in Laren and Bloemendaal (Noord-Holland) and Wassenaar (Zuid-Holland). Mortgage debts are lowest in Delfzijl (Groningen) at 110.5 thousand euros. Municipalities with low average mortgage debt levels are mostly located in the border regions of the Netherlands, in the provinces of Groningen, Friesland, Limburg and Zeeland. In these regions, average house prices as well as average household income and capital are lower than elsewhere in the Netherlands.

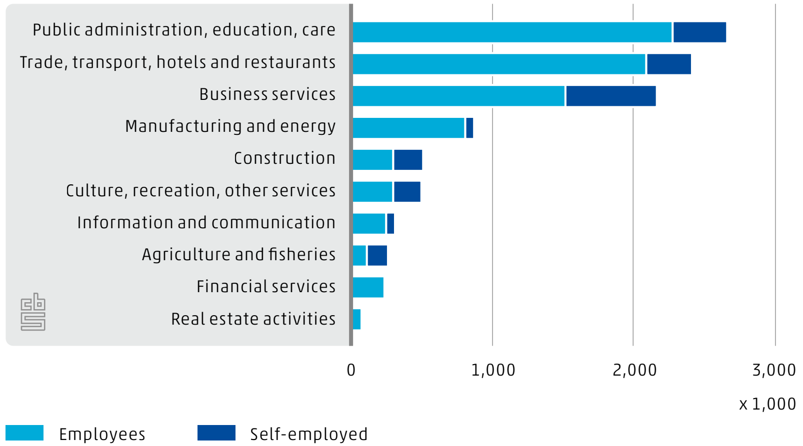
3.11 Median mortgage debt levels, 2015



3.12 Jobs



3.13 Jobs by sector, 2016



Labour

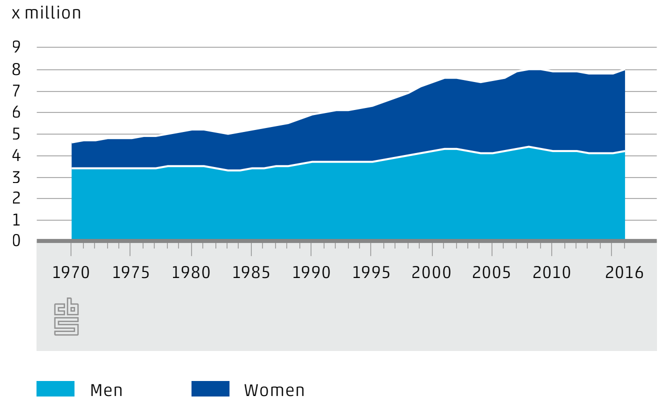
In 2016, the number of jobs in the Netherlands amounted to 10 million. This included 7.9 million employee and 2.1 million self-employed jobs. In comparison with 1970, the number of jobs has increased by 68 percent. The share of self-employed jobs has risen from 18 percent to 21 percent since 2003. It was even higher in the 1980s, namely 23 percent.

The combined sectors education, care and public administration contribute significantly to employment. Over one-quarter of all jobs are found in one of these sectors. The number of jobs is also significant in trade, transportation, hotels and restaurants, as well as in business services. The majority of self-employed people work in business services. On the other hand, agriculture and fisheries have the highest share of self-employed jobs: six out of ten jobs in this sector are held by self-employed.

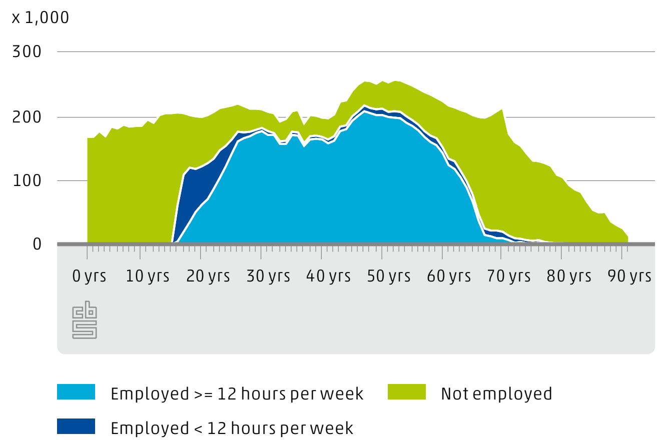
In 2016, nearly 50 percent of all employee jobs were held by women. This was 27 percent in 1970. The number of employee jobs for women has quadrupled since then. For men, it has increased by 22 percent. More than three-quarters of all employee jobs held by women are part-time jobs. The share of part-time jobs among men lags far behind but is still significant at 33 percent.

In 2016, 66 percent of the Dutch population aged 15 to 74 (the labour force) were in employment. Nine out of ten persons were working 12 or more hours per week. Young people in the age category 15 to 18 years usually have small jobs of less than 12 hours per week. Over the age of 60, considerably fewer people are in employment.

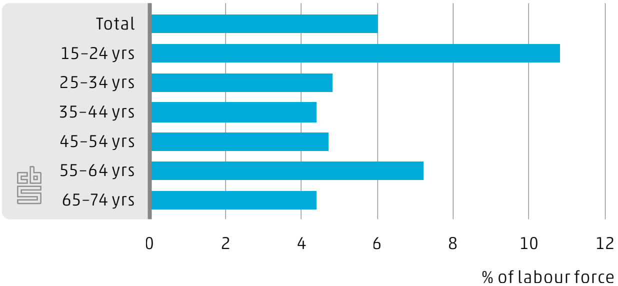
3.14 Employee jobs



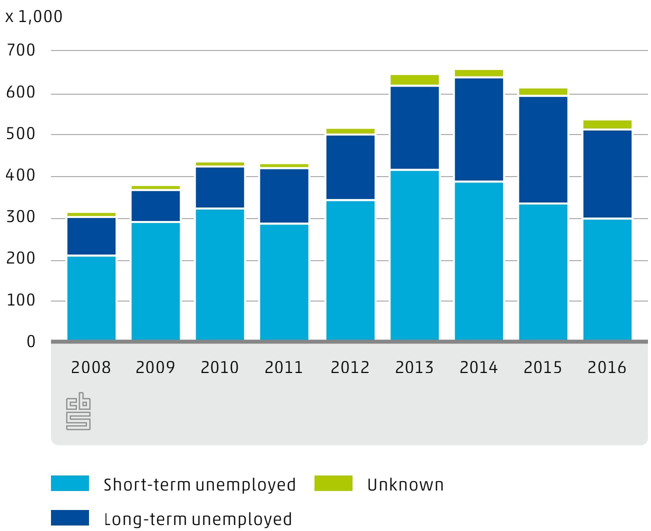
3.15 Employed labour force, 2016



3.16 Unemployment, 2016



3.17 Unemployed by unemployment duration



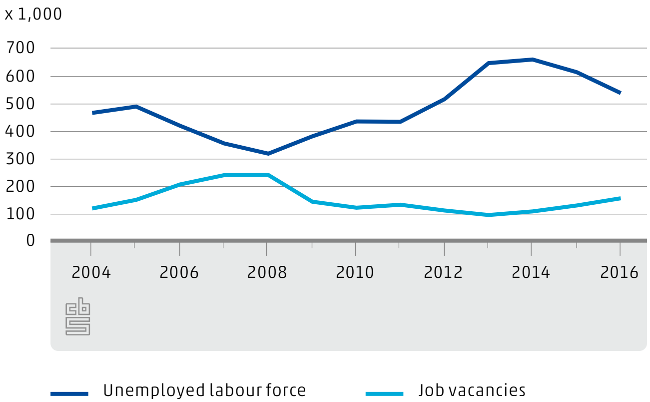
In 2016, 6 percent in the Dutch labour force were unemployed. An unemployed person is defined as someone who does not have a job but is looking and immediately available for work. Unemployment is highest among young people aged 15 to 24 with nearly 11 percent out of work. The unemployment rate is also relatively high among older people in the age category 55 to 64: over 7 percent.

The total number of unemployed in 2016 was more than one and a half times higher than in 2008, namely 538 thousand. The increase was particularly sharp in long-term unemployment (one year or longer). The number of unemployed has declined since 2014. Although the number of long-term unemployed fell by 43 thousand in 2016, this group was still more than twice as large as in 2008 (216 thousand against 95 thousand).

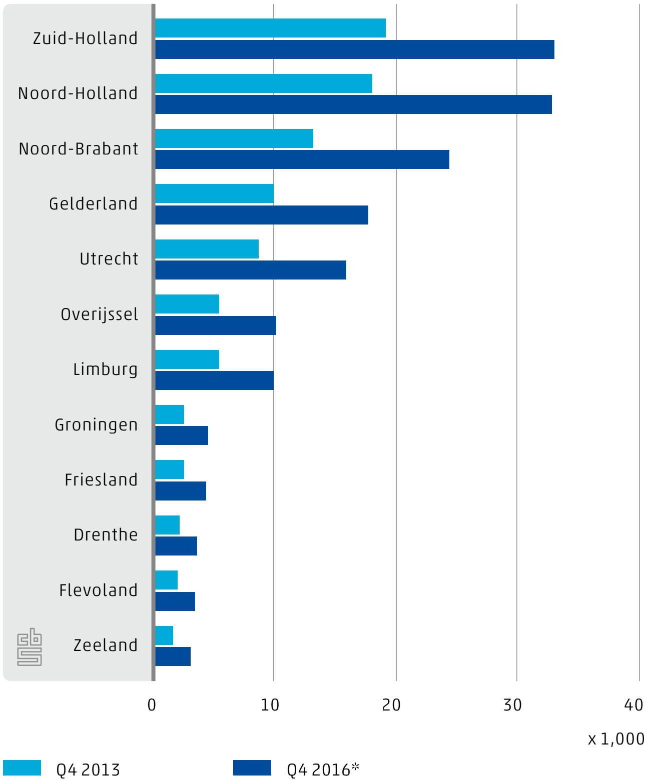
Around mid-year 2008, the number of job vacancies and the number of unemployed had balanced out: labour market tension was high. Then, the financial crisis caused the number of job vacancies to plummet while unemployment went up. By the end of 2013, the number of unemployed had eventually become over seven times higher than the number of job vacancies. The ratio of unemployed people against job vacancies has fallen back since then. At the end of 2016, there were on average 2.9 unemployed persons per unfilled vacancy.

In Q4 2013, the number of unfilled vacancies was at a low, but it has risen since then. Most unfilled vacancies are seen in the provinces of Noord-Holland and Zuid-Holland: 33 thousand, while Zeeland has the lowest number. Compared to 2013, relative growth is highest in Overijssel (+87 percent) and lowest in Drenthe (+68 percent). Relative to the size of the labour force, Utrecht has the highest number of unfilled job vacancies and Friesland the fewest in 2013 as well as in 2016.

3.18 Job vacancies and unemployed

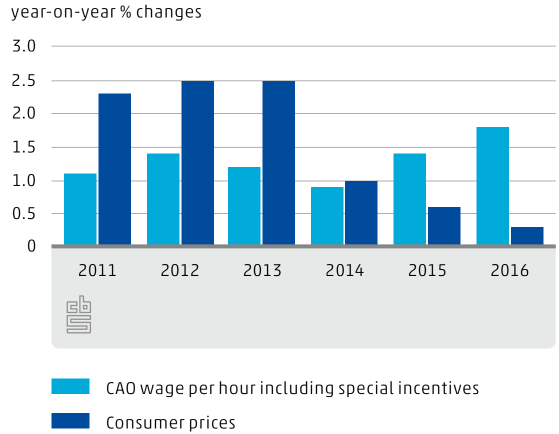


3.19 Unfilled job vacancies



In both 2015 and 2016, CAO (Collective Labour Agreement) wages increased more sharply than consumer prices. In the four preceding years, however, the wage increase fell behind consumer price developments due to the economic crisis. Wages increased by 1.8 percent in 2016. Only in 1987 and 2009 during the past thirty years, the increase in CAO wages was far above consumer price developments similar to 2016.

3.20 CAO wages and consumer prices

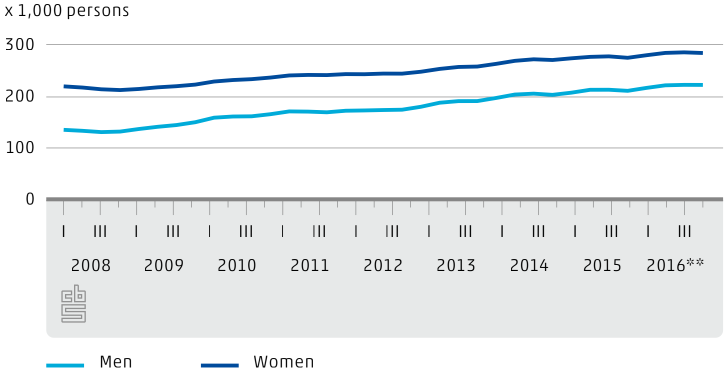


Social security

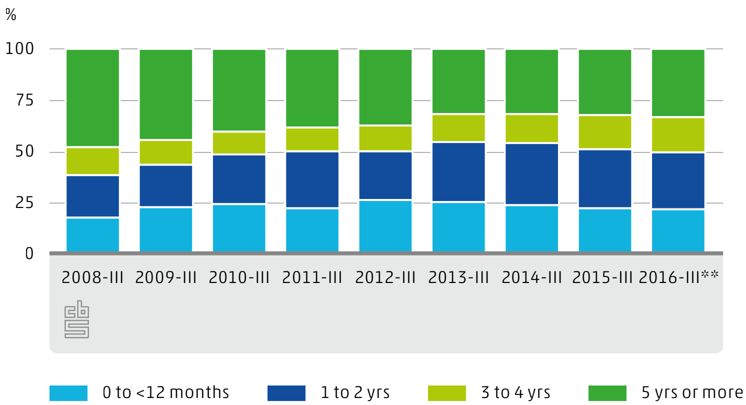
The number of people claiming income support has increased by 162 thousand since 2008, to 506 thousand at the end of Q3 2016. There are more women than men on income support, but since 2008, the sharpest increase has been among men. At the beginning of 2008, there were still 1.7 women on income support for each male claimant; this ratio dropped to 1.3 in Q3 2016.

The number of people who have lived on income support for five years or more has decreased. In Q3 2008, they still accounted for as much as 48 percent of all income support claimants, versus 33 percent in Q3 2016. In that quarter, half of the claimants had been on income support for less than three years.

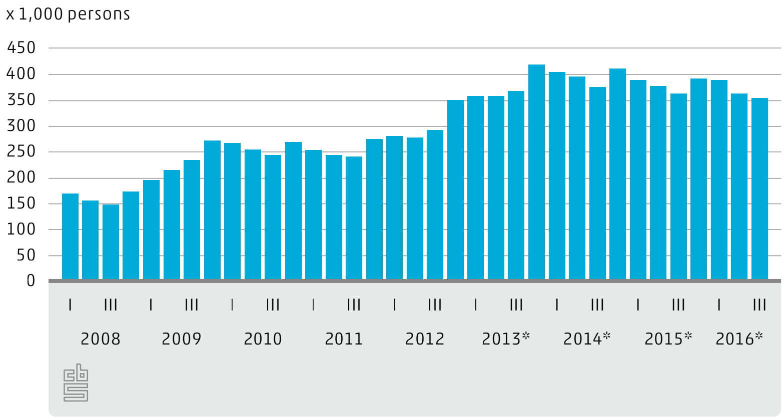
3.21 Income support, end of quarter



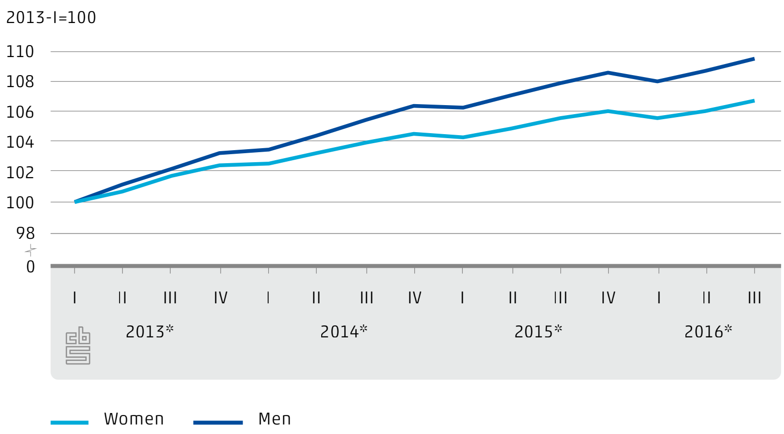
3.22 People on income support, duration



3.23 Unemployment benefits, end of quarter



3.24 People on state pension benefits, end of quarter



Since the start of the recession at the end of 2008, the number of unemployment benefit (WW) recipients has seen a primarily rising trend: from 150 thousand in September 2008 to over 400 thousand on 31 December 2014. The number started falling again in 2015 and stood at more than 350 thousand at the end of September 2016.

The retirement age for the AOW state pension has been raised gradually since 2013. It was increased by three months in 2016 and by one month in each preceding year. The effects are evident from falling numbers of state pension claimants at the beginning of each reporting year. Nevertheless, the number of people receiving AOW benefits continues to rise, slightly more among men than among women.

The Occupational Disability Insurance Act (WAO) was replaced by the Work and Income according to Labour Capacity Act (WIA) with effect from 2005, but continues to exist for people who are already receiving a disability benefit or, within five years after termination of the benefit, become disabled again for the same reason. The number of people on disability benefits has therefore fallen dramatically, whereas the number of people on benefits under the Work Resumption Scheme for Partially Disabled (WGA) or Income Provisions for Completely Disabled (IVA), both part of WIA, has increased.

3.25 Disability benefits