

## Consumers Revamp Their Digital Spending

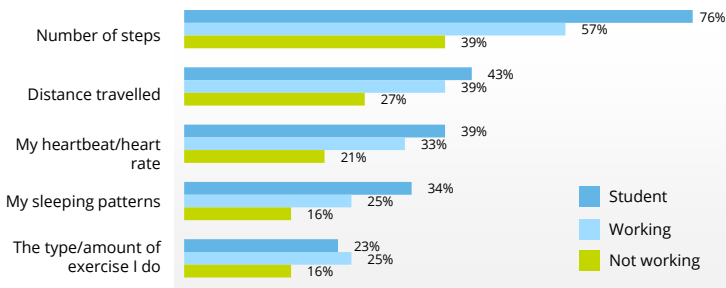


Consumers in the Netherlands are turning to digital tech to improve their health, while accessing fewer streaming services and making changes to their home Internet service, as the cost-of-living crisis bites. Those are some of the insights from the Deloitte Digital Consumer Trends Survey 2023, which canvassed the views of more than 2,000 people in the Netherlands during the summer of 2023. The survey generated valuable insights on a wide range of topics, including generative AI, consumers' views on digital privacy and sustainability, as well as uptake of digital devices and services. To explore the results, click [here](#).

### Households adopt smart watches

The findings of the research point to how smartphones, tablets and wearable devices now serve as personal assistants, health monitors, and entertainment hubs, as well as communication tools. The survey found that 54% of Dutch consumers now use a watch, fitness band or a handset to track their daily steps, 31% track their heartbeat and 23% their sleeping patterns. This trend is particularly prevalent among students (see graphic). Tellingly, one third of respondents now own, or have access to, a smart watch - more than double the penetration of 2020.

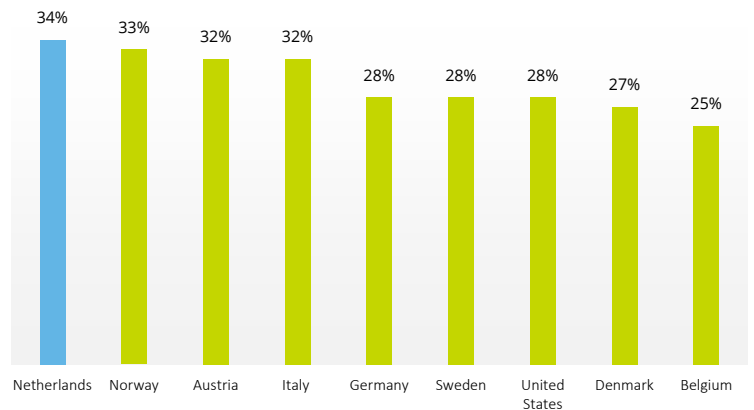
#### Which of these do you monitor on your devices such as smartphones, smart watches, fitness bands, etc.?



Source: Deloitte Digital Consumer Trends Survey 2023, NL edition and global data aggregation  
Weighted base: All adults 18-70 (n=1918)

Interestingly, Dutch consumers are among the highest adopters of smart watches in Europe (see graphic).

#### Do you own or have access to a smart watch? - Agree

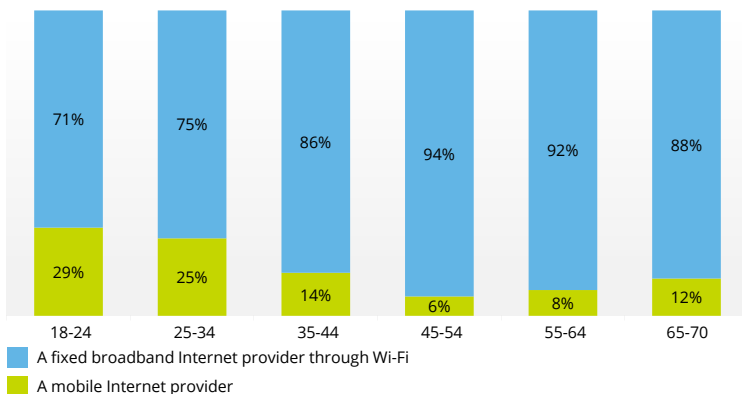


Source: Deloitte Digital Consumer Trends Survey 2023, NL edition and global data aggregation  
Weighted NL base: All adults (n=2000)

### Making new connections

Although the Netherlands has yet to release a key tranche of 5G spectrum, almost half of all Dutch consumers now use a 5G phone as their main handset, with the penetration of 5G particularly high among adults under the age of 45. Younger people are more inclined than their older counterparts to rely on mobile networks for connectivity in the home. One quarter of adults under the age of 35 use a mobile Internet service for their home broadband - a similar proportion as a year earlier (see graphic).

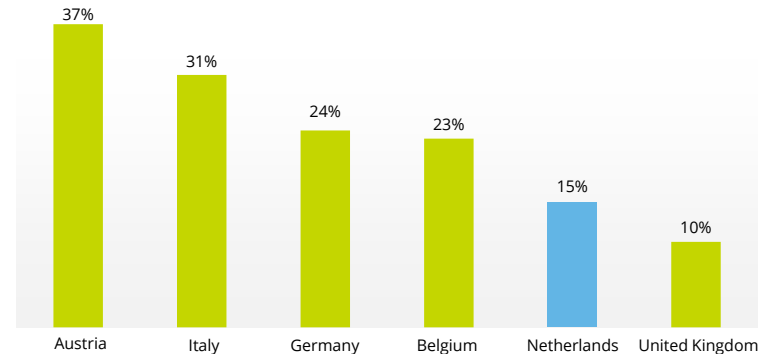
#### What is your main provider of your internet at home?



Source: Deloitte Digital Consumer Trends Survey 2023, NL edition and global data aggregation  
Weighted base: All adults 18-70 (n=1993)

Although a significant number of younger people use mobile connections as their service for the house, overall penetration of mobile internet as a main provider remains low compared to other European countries (see graphic) at 15%. This is likely to be due to the extensive coverage of high-speed fixed line networks in the Netherlands.

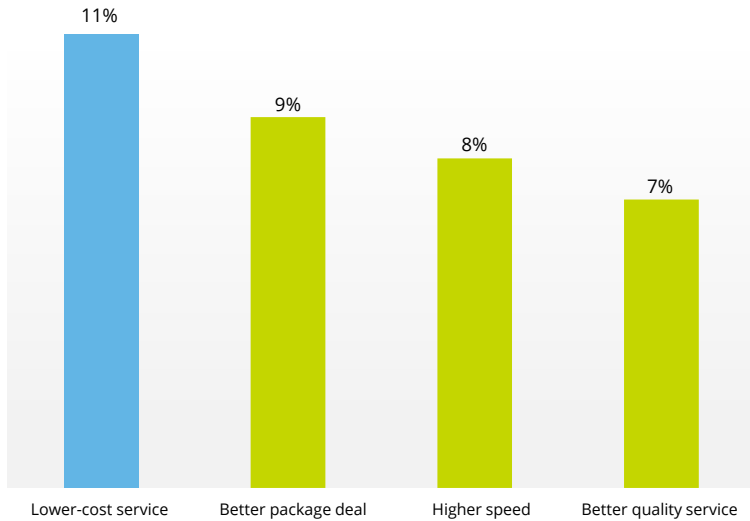
#### Is Mobile internet your main provider of your internet at home? - Agree



Source: Deloitte Digital Consumer Trends Survey 2023, NL edition and global data aggregation  
Weighted NL base: All adults (n=1993)

Still, some consumers are looking to spend less on connectivity, or at least get better value. 35% say they made changes to their home internet service in the past 12 months, a slight increase compared to the 33% of last year. That figure was 57% among people under 35. The most common reason was to lower expenditure, followed by a better package deal (see graphic). However, some changes were driven by a desire for higher speeds and better-quality service, reflecting the shift to more remote working and online education, which have made it even more important to have a robust home Internet service.

**Which of the following changes have you made to your home internet service in the past 12 months?**

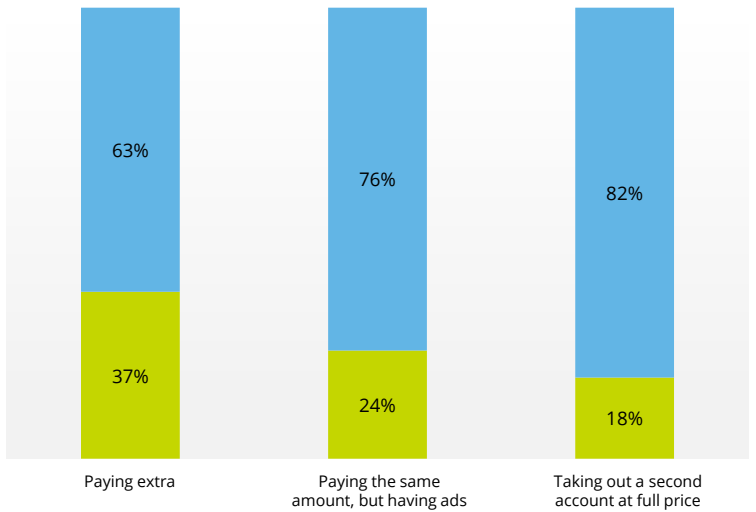


Source: Deloitte Digital Consumer Trends Survey 2023, NL edition and global data aggregation  
Weighted base: All adults 18-70 who have internet access at home (n=1993)

**Account sharing still popular**

The survey found that 44% of Netflix, and Disney+ and/or Amazon Prime subscribers share their accounts with other households. If sharing video subscription service accounts with people outside your household was banned, 37% of consumers would be willing to pay extra to share their streaming accounts with other households, while 24% would accept advertisements as the price of sharing their account (see graphic).

**If sharing video subscription service accounts with people outside your household was banned, would you or would you not consider any of the following?**



Legend:  
■ Would not consider  
■ Would consider

Source: Deloitte Digital Consumer Trends Survey 2023, NL edition and global data aggregation  
Weighted base: All adults 18-70 (n=1354)

The Deloitte Digital Consumer Trends Survey generated many more insights into consumers' views on a wide range of topics including generative AI, data protection and sustainability, as well as trends in digital products and services. To access the full report, click [here](#).

**Contacts**



**Jan-Piet Nelissen**  
**Partner TMT Strategy**  
 Deloitte Netherlands  
[jnelissen@deloitte.nl](mailto:jnelissen@deloitte.nl)  
 +31620390670



**Jens Groot**  
**Director TMT Strategy**  
 Deloitte Netherlands  
[jgroot@deloitte.nl](mailto:jgroot@deloitte.nl)  
 +31882884816

