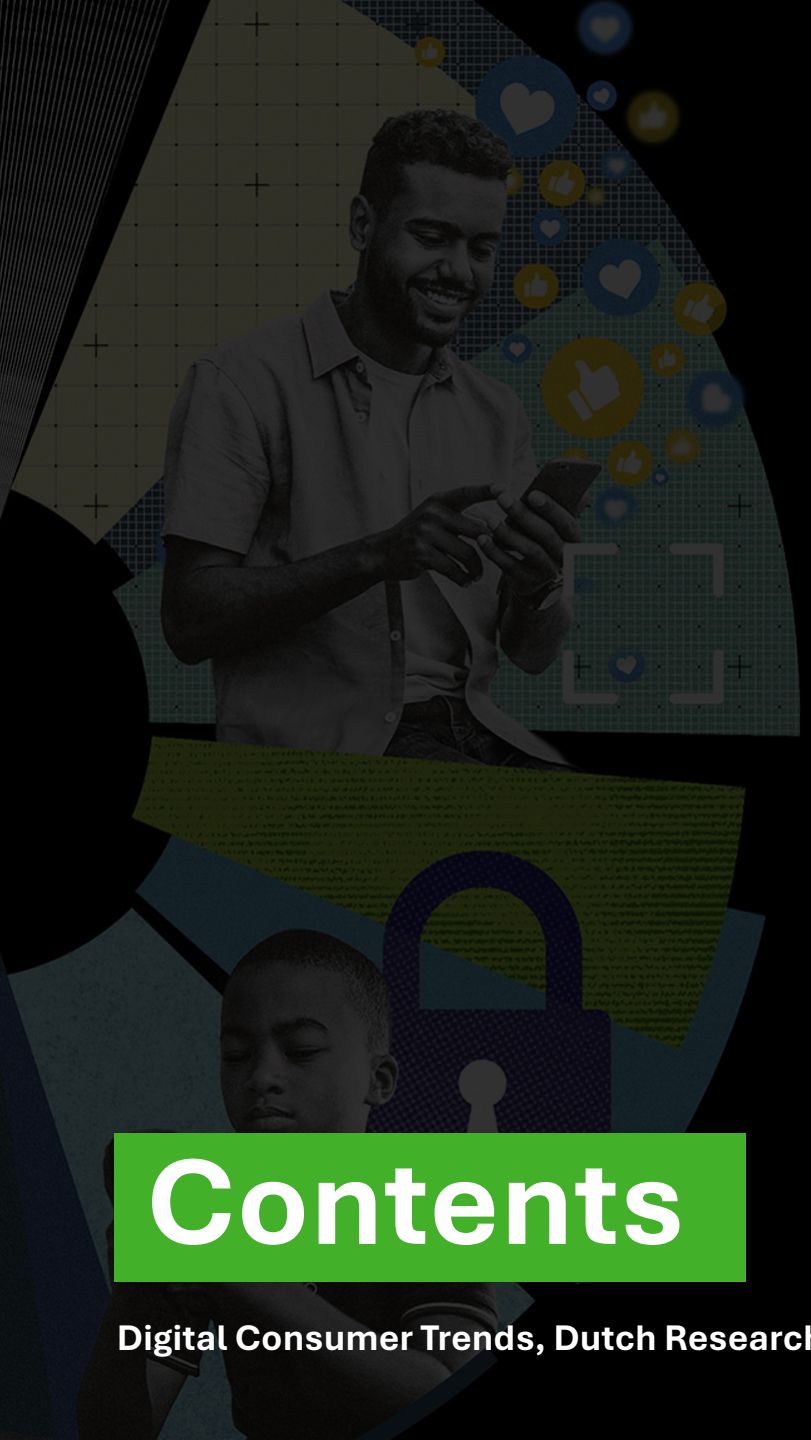
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Together makes progress

Digital Consumer Trends



Dutch Research Edition | January 2026



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Digital Consumer Trends, Dutch Research Edition

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About Deloitte's

Digital Consumer Trends

- Digital Consumer Trends (NL Edition) is conducted by Deloitte's Technology, Media and Telecommunications (TMT) practice.
- Digital Consumer Trends is a study of how individuals engage with and purchase digital products. It spans devices, connectivity, media, and emerging technologies.
- It is a multi-country study. In this report, the findings from the Netherlands are compared with those from the United Kingdom, Italy and Portugal.
- Fieldwork was conducted in August 2025 by Ipsos, an independent research agency. The survey was distributed to 2,000 consumers in the NL aged between 18-75, and weighted for demographics such as age, gender, region and working status.
- Questions cited in this document may be simplified for the sake of visualization.

Throughout this report we compare digital Consumer Trends across four generations

Gen Z

BORN 1996–2007

Age range 18–29



Millennials

BORN 1980–1995

Age range 30–45



Gen X

BORN 1966–1979

Age range 46–59



Baby Boomers

BORN 1950–1965

Age range 60–75





Generative AI

Digital Consumer Trends, Dutch Research Edition

Key Insights – Generative AI

Executive Summary

- Awareness and use of GenAI rose sharply in 2025: 76% of users are aware (up from 60% in 2024), and 61% of all consumers have used GenAI (up from 42% in 2024).
- GenAI use is predominantly personal at 83% (up from 70% in 2024), rising in the workplace to 52% (up from 48% in 2024), and lower for educational purposes at 20% (down from 26% in 2024).
- Consumers primarily use GenAI to look-up information (59%), to generate ideas (47%), and to summarize text (41%).
- Employees frequently use third-party tools with 15% paying for the tool themselves. Only 17% of those using GenAI at work use tools developed in-house.
- Trust and attitudes shift, as only 20% of consumers believe GenAI responses are unbiased (down from 36% in 2023), and reluctance to use AI customer service and creative content has risen to 58% (up from 53% in 2024).

Strategic Implications

- There is an opportunity for companies across TMT to bridge the gap between personal and professional GenAI usage (83% vs 52%) through training and change to get more impact of AI
- TMT companies need to address the potentially high usage (53% of employees) of unapproved free tools, amongst others through improved governance, formalizing AI policies and procedures
- For Telco, Media and Tech companies there is an opportunity to improve customer experience whilst reducing costs through the increasing usage of passive AI (now 73%); for tech companies this opens the opportunity for indirect, vendor positions to scale their AI technology

Yearly usage rate
(among all consumers)
61%
▲ 45% since 2024

Work usage
(among consumers that use GenAI)
52%
▲ 8% since 2024

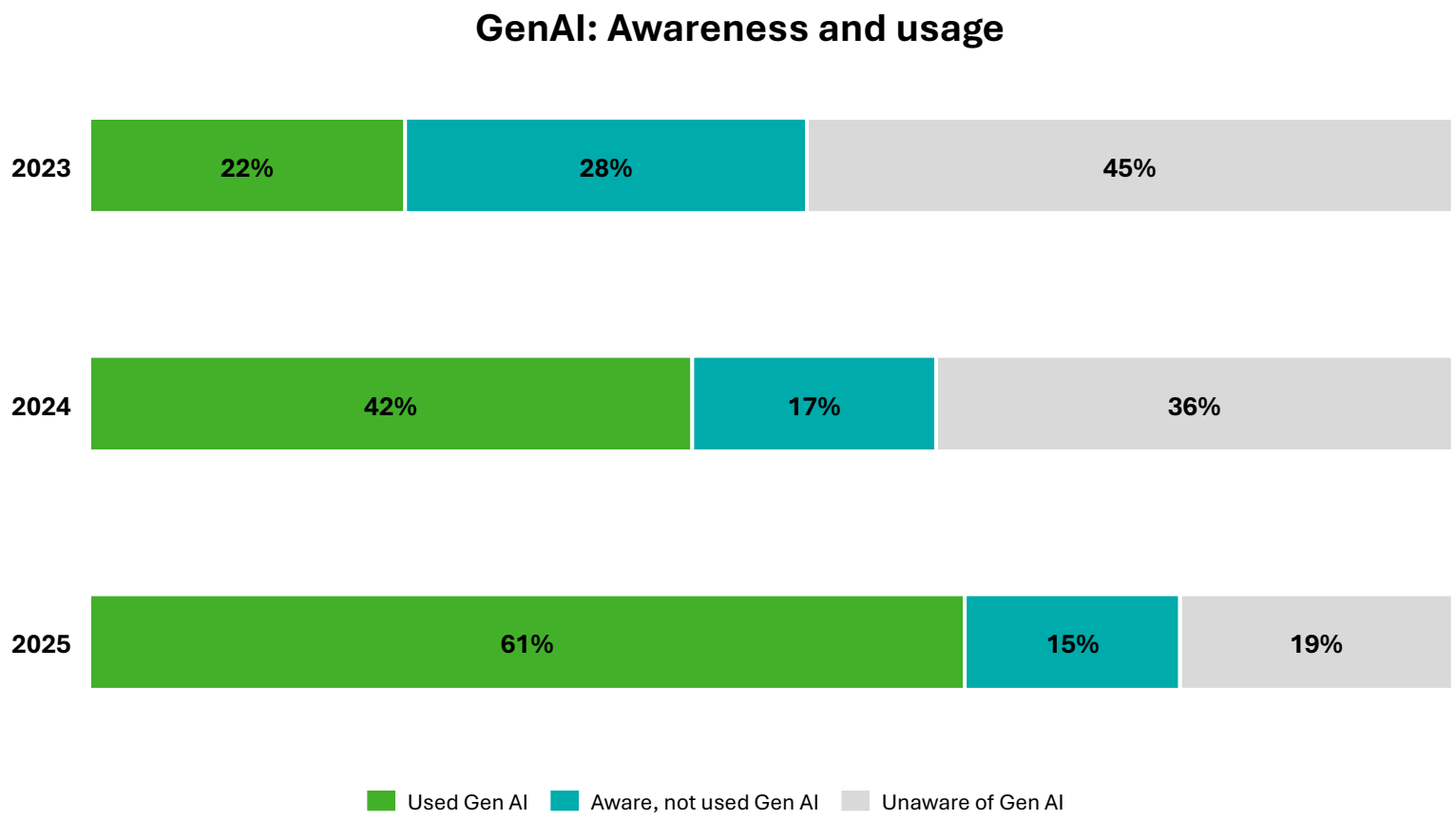
Using non-approved free AI tool
(among consumers that use GenAI for work)
53%

Reported no company policy
(among consumers that use GenAI for work)
23%

GenAI usage and awareness has increased to 76% in 2025

More than half (61%) of Dutch citizens have used GenAI. Which is a steady increase from the previous years, with a (45%) increase from 2024 and a (177%) increase since 2023. As a result, the number of individuals who have not used GenAI is rapidly decreasing.

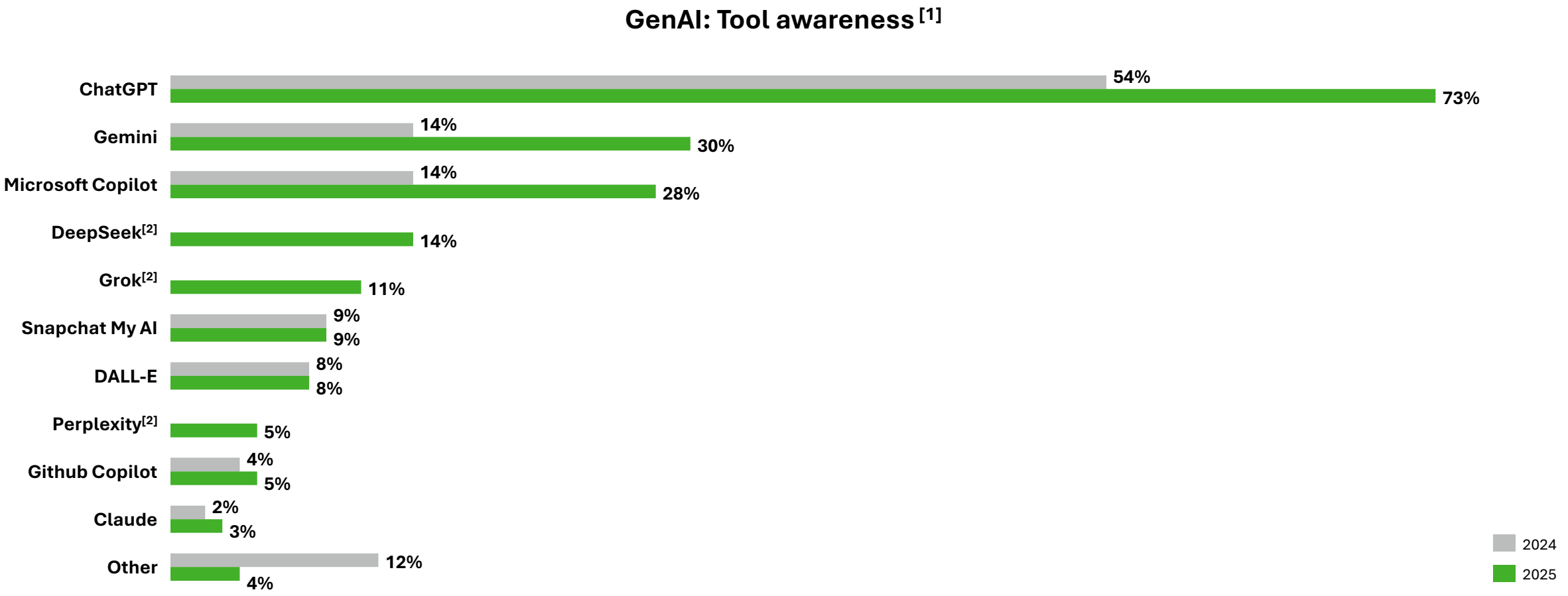
This is clear momentum for the adoption of GenAI tools, amid sustained public interest and relentless marketing from major tech companies.



Question: Which, if any, of the following Generative AI tools are you aware of?; Which, if any, Generative AI tools have you used?
Weighted base: All respondents aged 18-75, 2023 (2000), 2024 (2000), 2025 (2000)
Source: Deloitte Digital Consumer Trends, NL, 2023-2025

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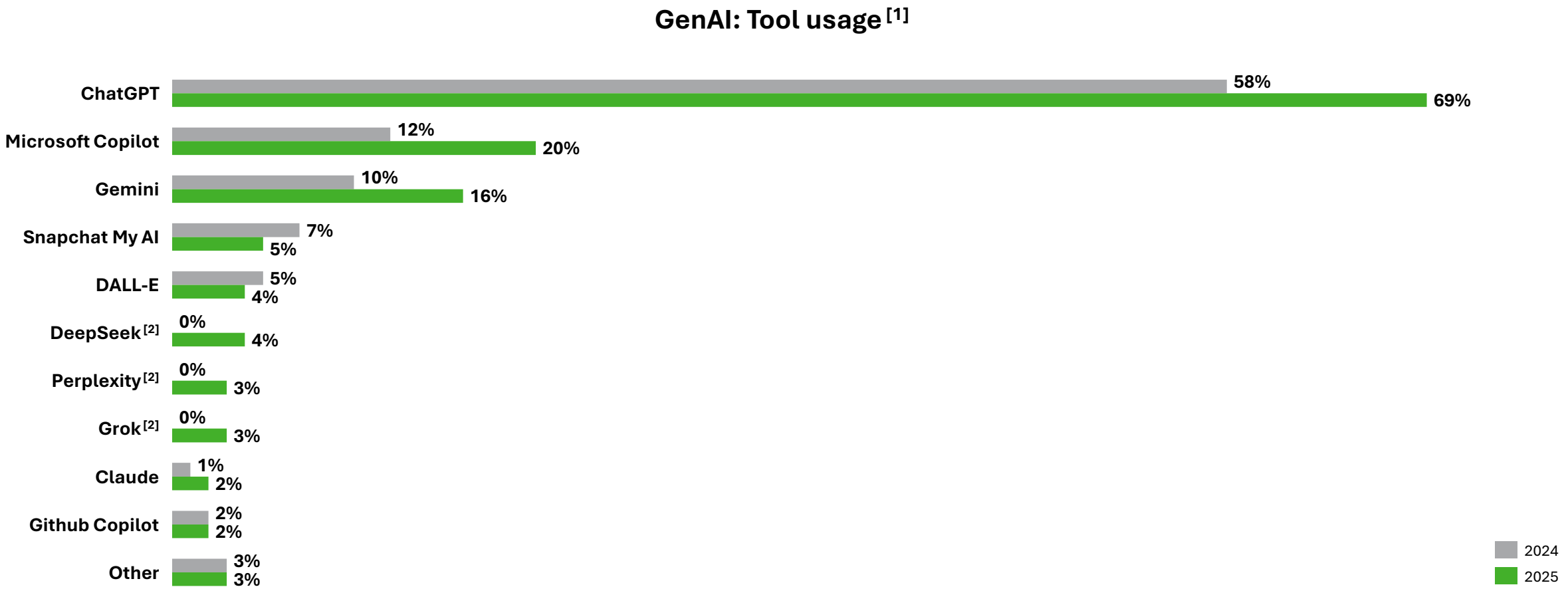
Led by ChatGPT's surge to 73% awareness (35% increase from 2024), public recognition for other major platforms like Gemini and Copilot has also grown dramatically



Question: Which, if any, of the following Generative AI tools are you aware of?
Weighted base: All respondents aged 18-75 years, 2024 (2000), 2025 (2000)
[1] Survey fielded in August. Figures may understate the actual end of 2025 awareness (e.g. Gemini 3 launched in November which could have led to increased awareness); [2] DeepSeek, Perplexity & Grok were not part of the 2024 survey
Source: Deloitte Digital Consumer Trends, NL, 2024-2025

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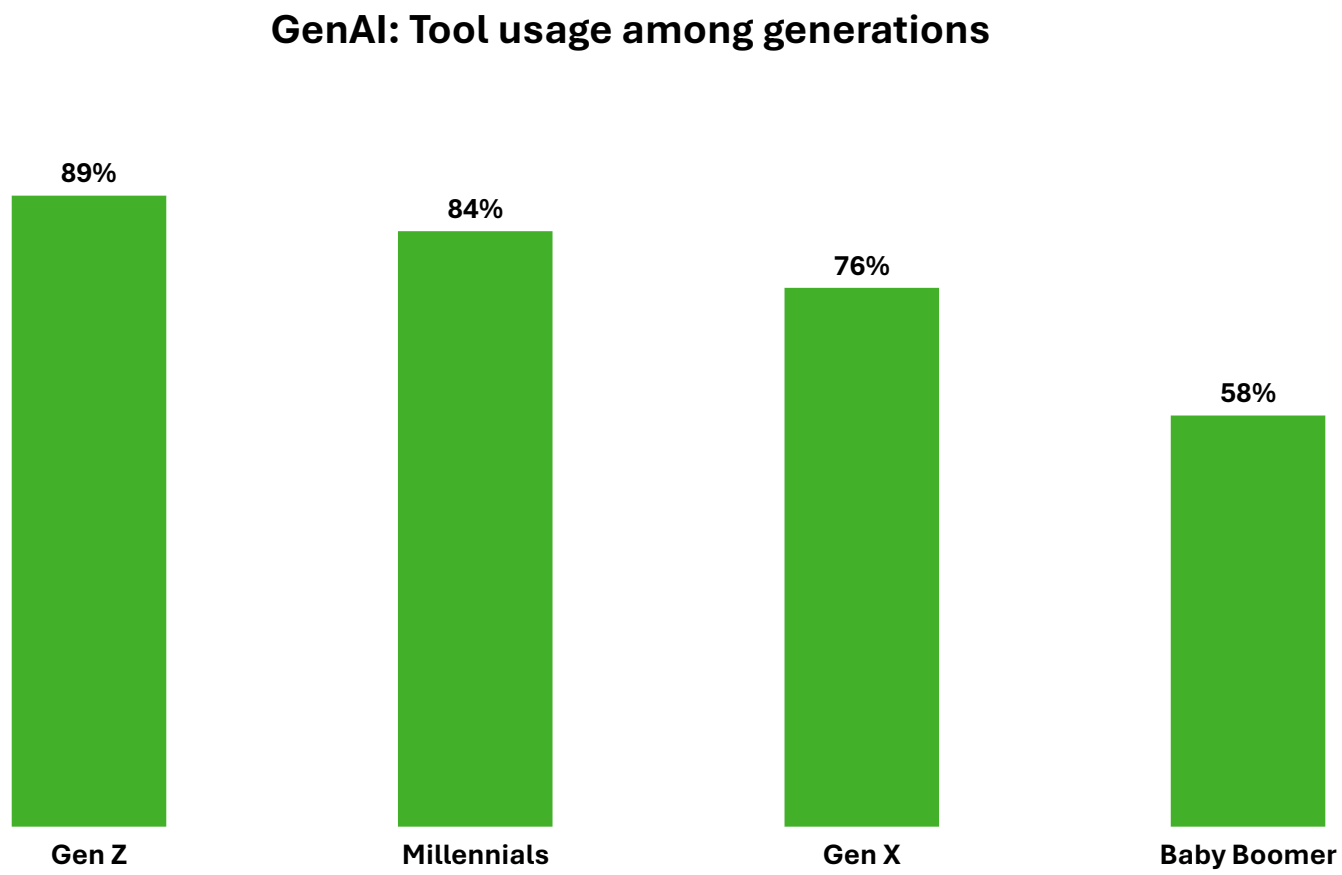
Use of GenAI tools have increased since 2024, ChatGPT still remains the most widely used tool



Question: Which, if any, Generative AI tools have you used?
Weighted base: All respondents aged 18-75 years, 2024 (1149), 2025 (1565); Respondents who are aware of any GenAI tool
[1] Survey fielded in August. Figures may understate the actual end of 2025 usage (e.g. Gemini 3 launched in November which could have led to increased usage); [2] DeepSeek, Perplexity & Grok were not part of the 2024 survey
Source: Deloitte Digital Consumer Trends, NL, 2024-2025

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Younger generations show greater GenAI adoption: 89% of Gen Z, versus 58% of Baby Boomers

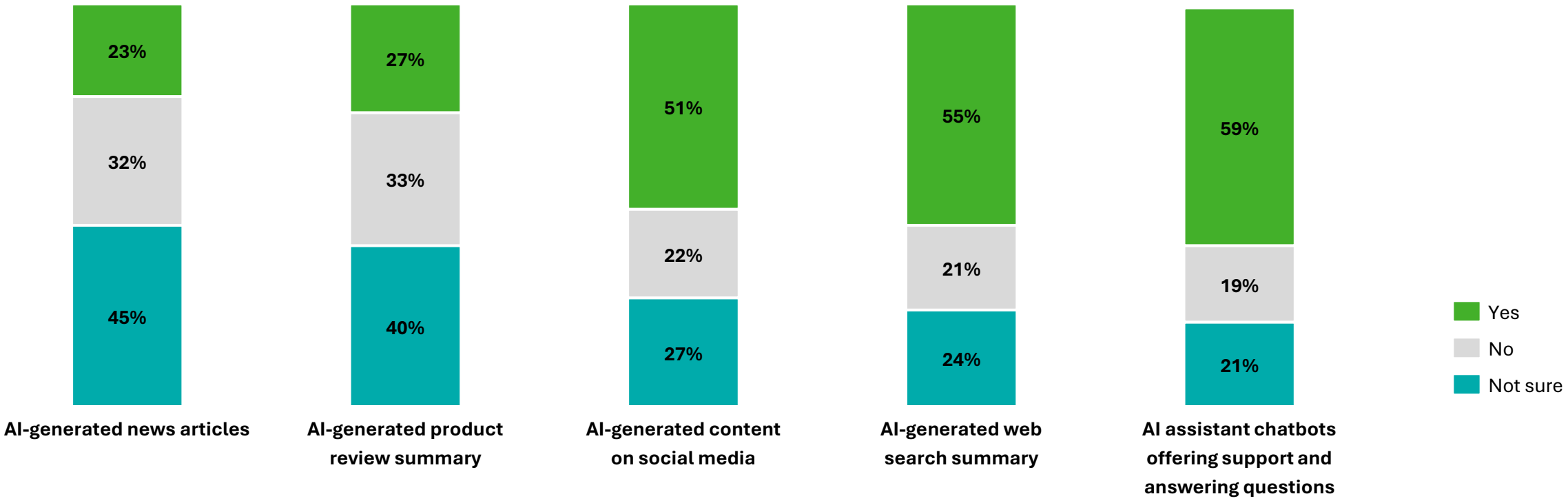


Question: Which, if any, Generative AI tools have you used?
Weighted base: All respondents aged 18-75 years, 2025 (1565); Respondents who are aware of any GenAI tool
Source: Deloitte Digital Consumer Trends, NL, 2025

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Consumers struggle to identify the AI-generated content apart from human-generated content, with over 40% unsure on news articles and product reviews

GenAI: Encounter AI-generated content

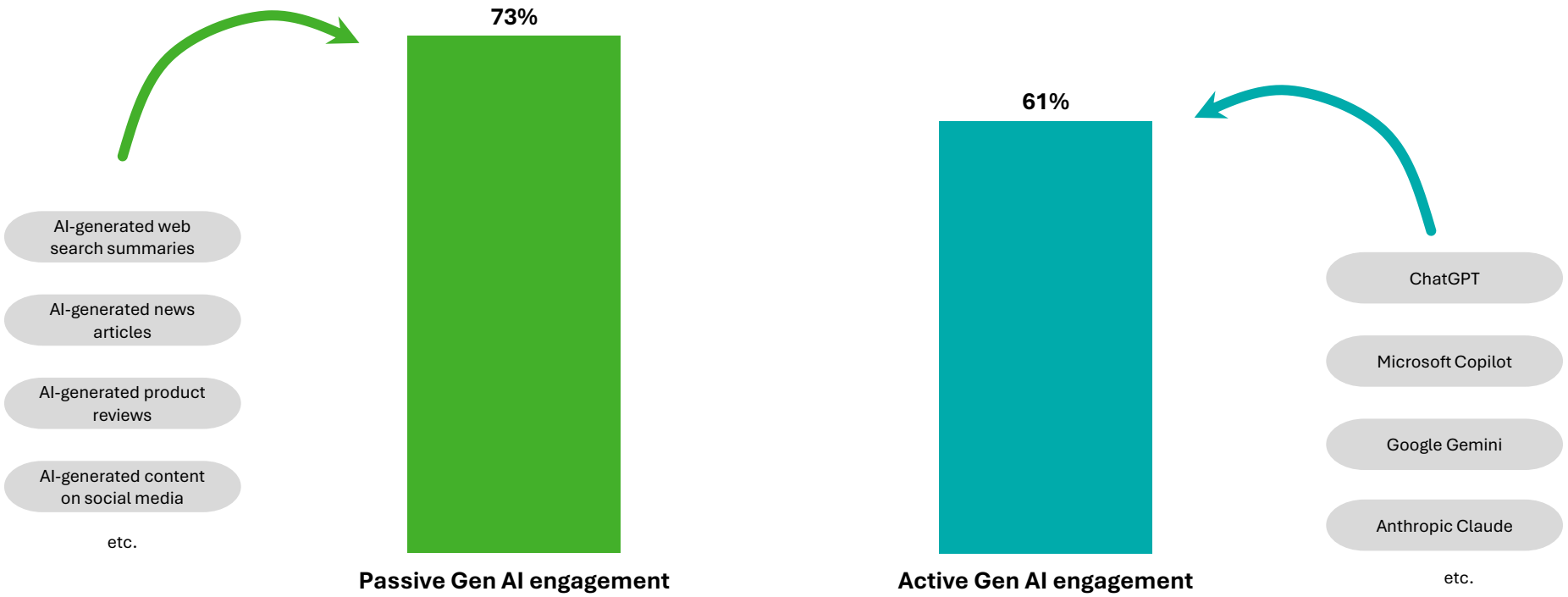


Question: In the last 12 months, have you come across any of these AI features while using your devices or browsing online?
Weighted base: All respondents aged 18-75 years, 2025 (2000)
Source: Deloitte Digital Consumer Trends, NL, 2025

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Among GenAI users, engagement occurs passively (73%) more often than actively (61%)

GenAI: Passive vs active usage



Question: In the last 12 months, have you come across any of these AI features while using your devices or browsing online?; Which of the following purposes have you used any GenAI for?
Weighted base: All respondents aged 18-75 years, 2025 (1221); Respondents who have used any GenAI tool
Source: Deloitte Digital Consumer Trends, NL, 2025

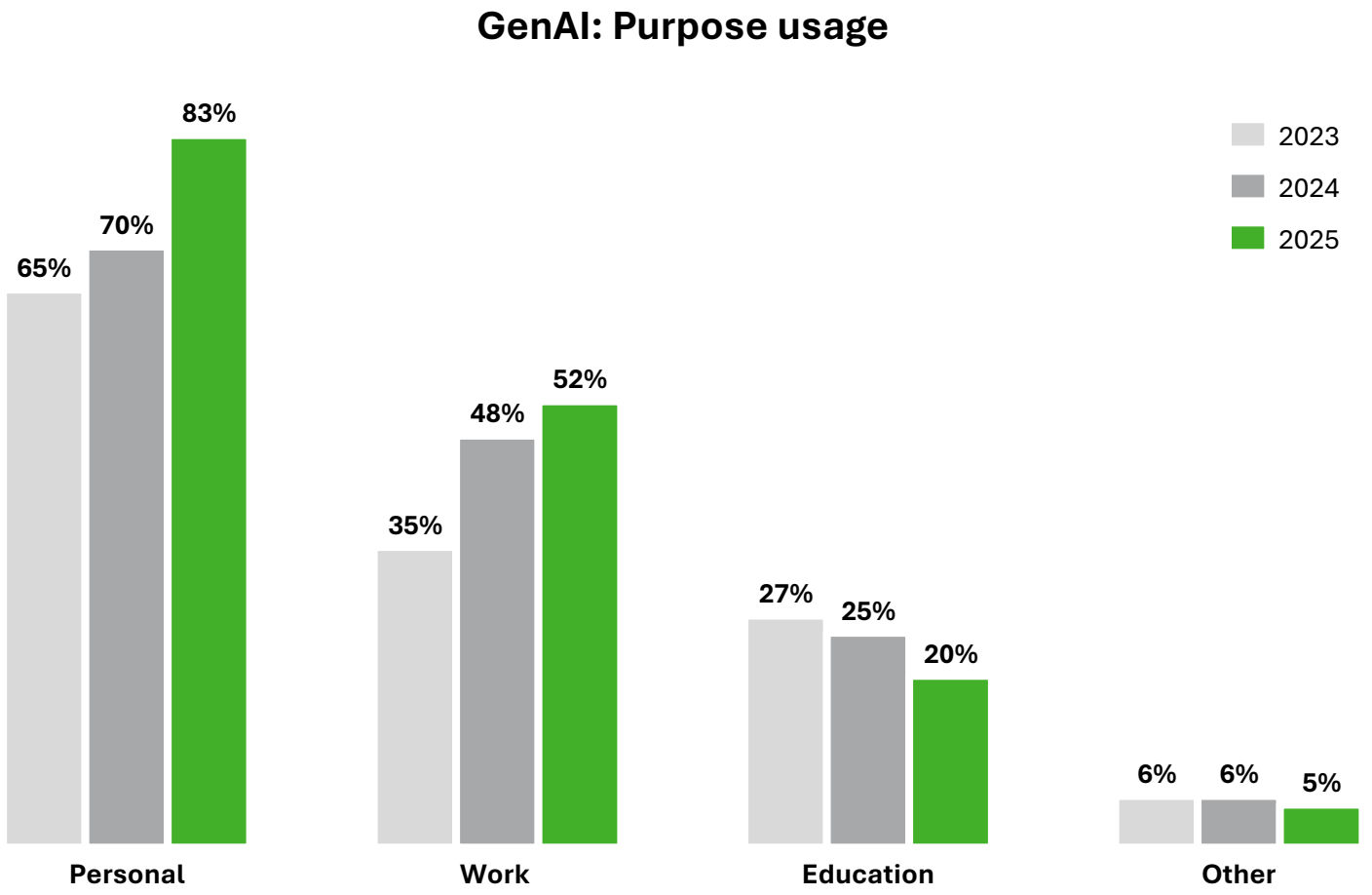
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GenAI usage has decreased for educational purposes but increased for personal and work purposes since 2023

Of those respondents using GenAI tools, most (83%) use these for personal purposes.

Since 2023, the proportion of individuals using GenAI tools for personal purposes have increased by 28% and work by 49%.

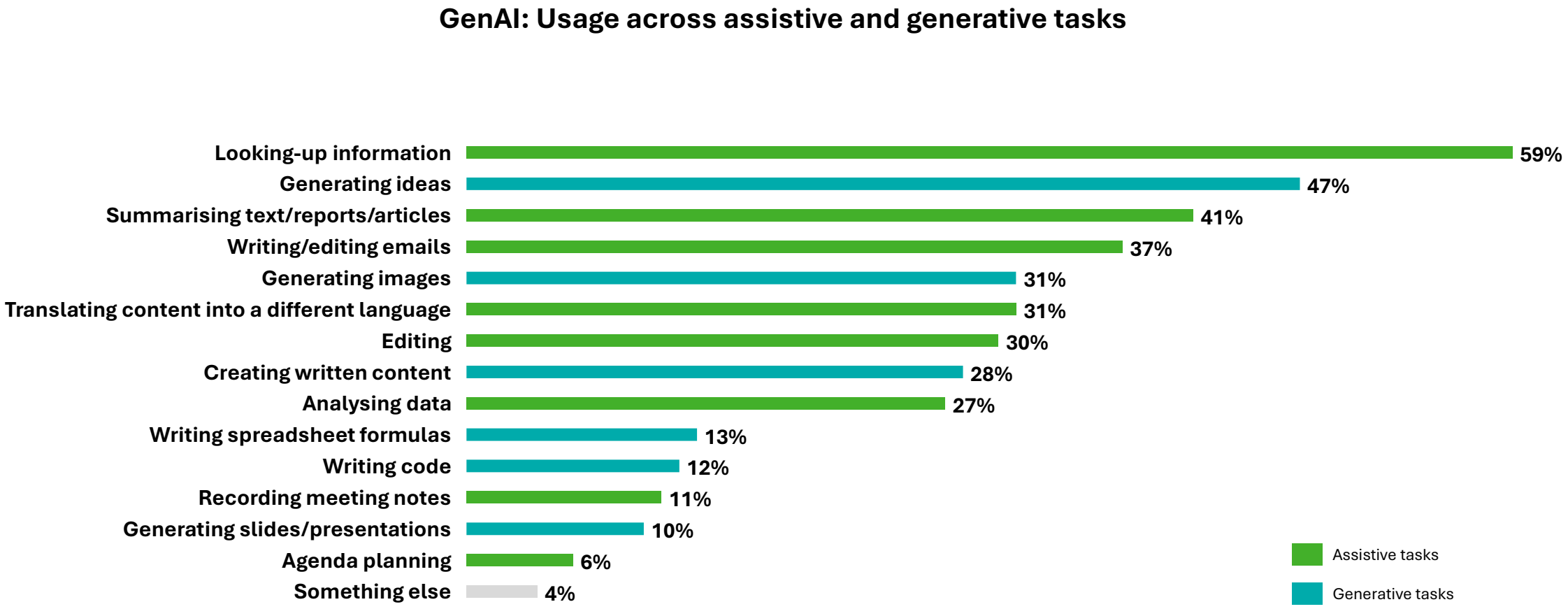
A smaller portion of individuals has been using GenAI tools for educational purposes, dropping from 27% in 2023 to 20% in 2025.



Question: Which of the following purposes have you used any GenAI for?
Weighted base: All respondents aged 18-75 years, 2023 (547), 2024 (839), 2025 (1221); Respondents who have used any GenAI tool
Source: Deloitte Digital Consumer Trends, NL, 2023-2025

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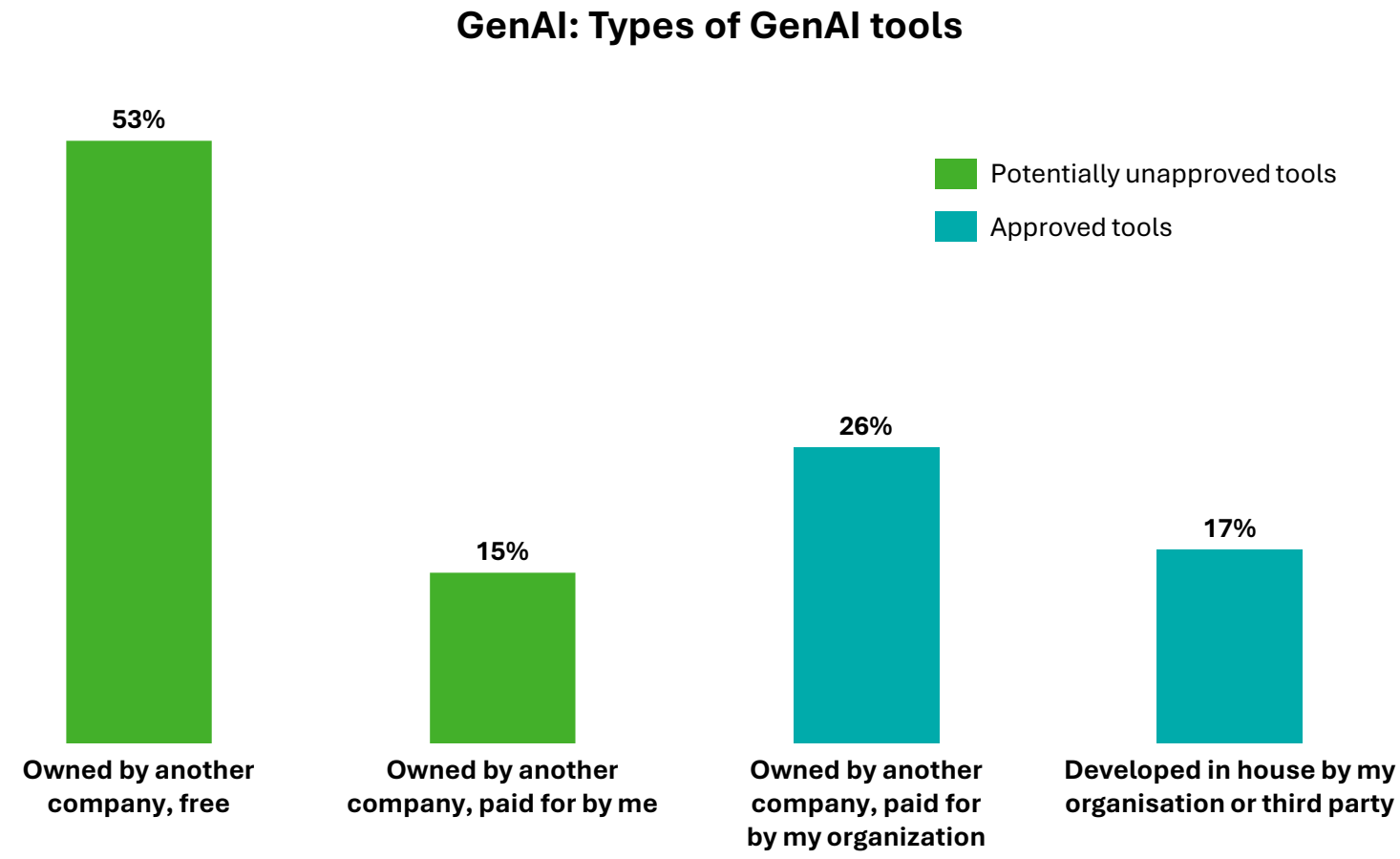
Consumers primarily use GenAI to look-up information (59%), to generate ideas (47%), and to summarize text (41%)



Question: Which of the following work tasks have you used any Generative AI tools for?
Weighted base: All respondents aged 18-75 years, 2025 (632); Respondents who have used any GenAI tool for work
Source: Deloitte Digital Consumer Trends, NL, 2025

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Employees using GenAI tools use external (potentially unapproved) tools more frequently than employer-approved tools



Of the respondents who use GenAI for work, more than half (53%) use tools that are free and owned by another company, risking data privacy and sensitivity issues.

Only around quarter of the employees use GenAI tools approved by their employers with only 17% using in-house developed tools.

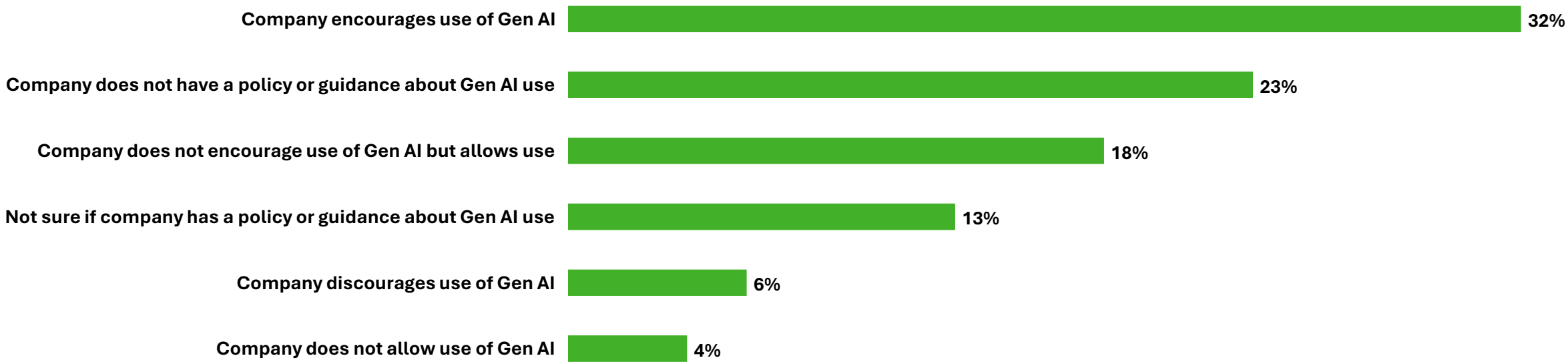
Question: Which, if any, of the following statements describe the Generative AI tools you have used for work?
Weighted base: All respondents aged 18-75 years, 2025 (632); Respondents who have used any GenAI tool for work
Source: Deloitte Digital Consumer Trends, NL, 2025

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32% of the employees are encouraged by their employers to use GenAI for work tasks, while 23% report that there are no employer policy or guidance about GenAI use

More than one-third of employees using GenAI (36%) in a company that has no policy or guidance about GenAI use or is insufficiently clear about this. About 10% of respondents work for a company that either discourages or disallows the use of GenAI tools for work.

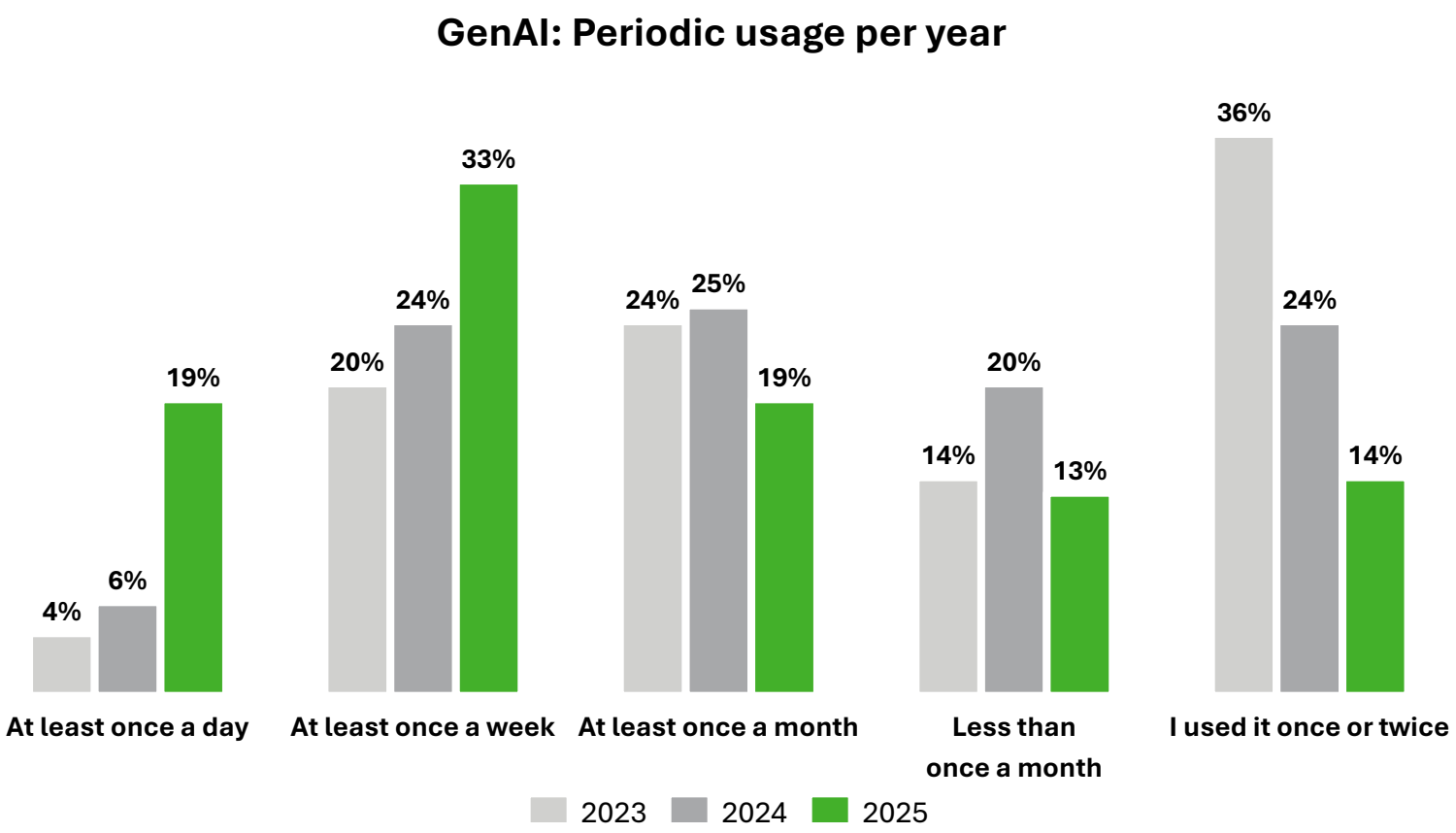
GenAI: Company policies and guidance



Question: Thinking about the use of GenAI tools for work purposes, which, if any, of the following statements applies to your company about the use of Generative AI tools for work purposes?
Weighted base: All respondents aged 18-75 years, 2025 (632); Respondents who have used any GenAI tool for work
Source: Deloitte Digital Consumer Trends, NL, 2025

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Daily GenAI usage has increased close to fivefold since 2023



Daily GenAI use has risen nearly fivefold since 2023, and 52% of respondents now use GenAI either at least once daily or weekly.

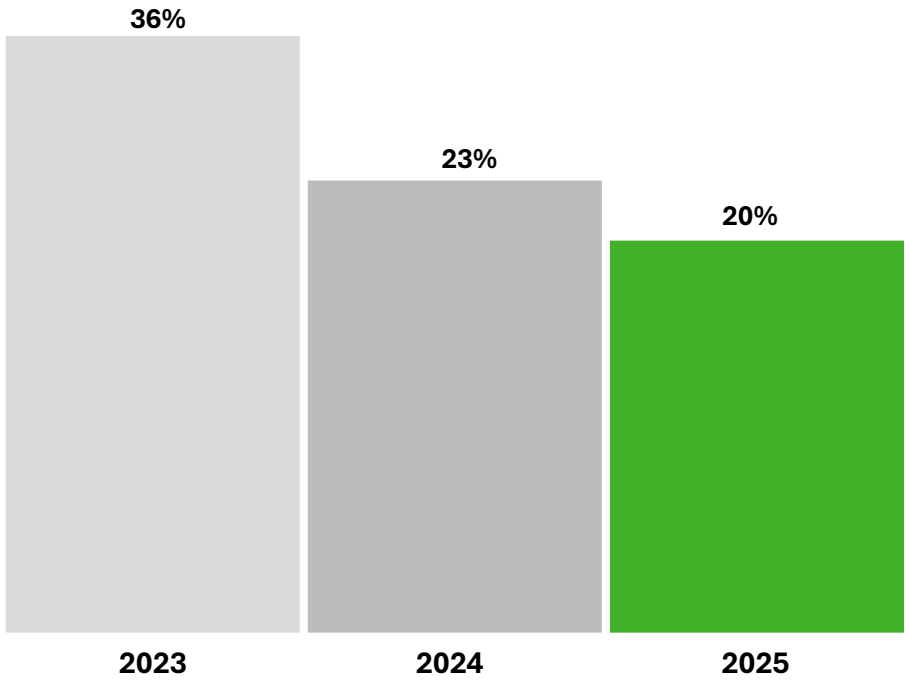
Occasional use of GenAI (once a month or less) has decreased, indicating a shift to more regular GenAI use amongst users.

Question: You mentioned you have used Generative AI. Which of the following best describes your use?
Weighted base: All respondents aged 18-75 years, 2023 (547), 2024 (806), 2025 (1221); Respondents who have used any GenAI tool
Source: Deloitte Digital Consumer Trends, NL, 2023-2025

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Belief of Dutch consumers that GenAI responses are unbiased has declined to 20%

GenAI: Believe that GenAI responses are unbiased



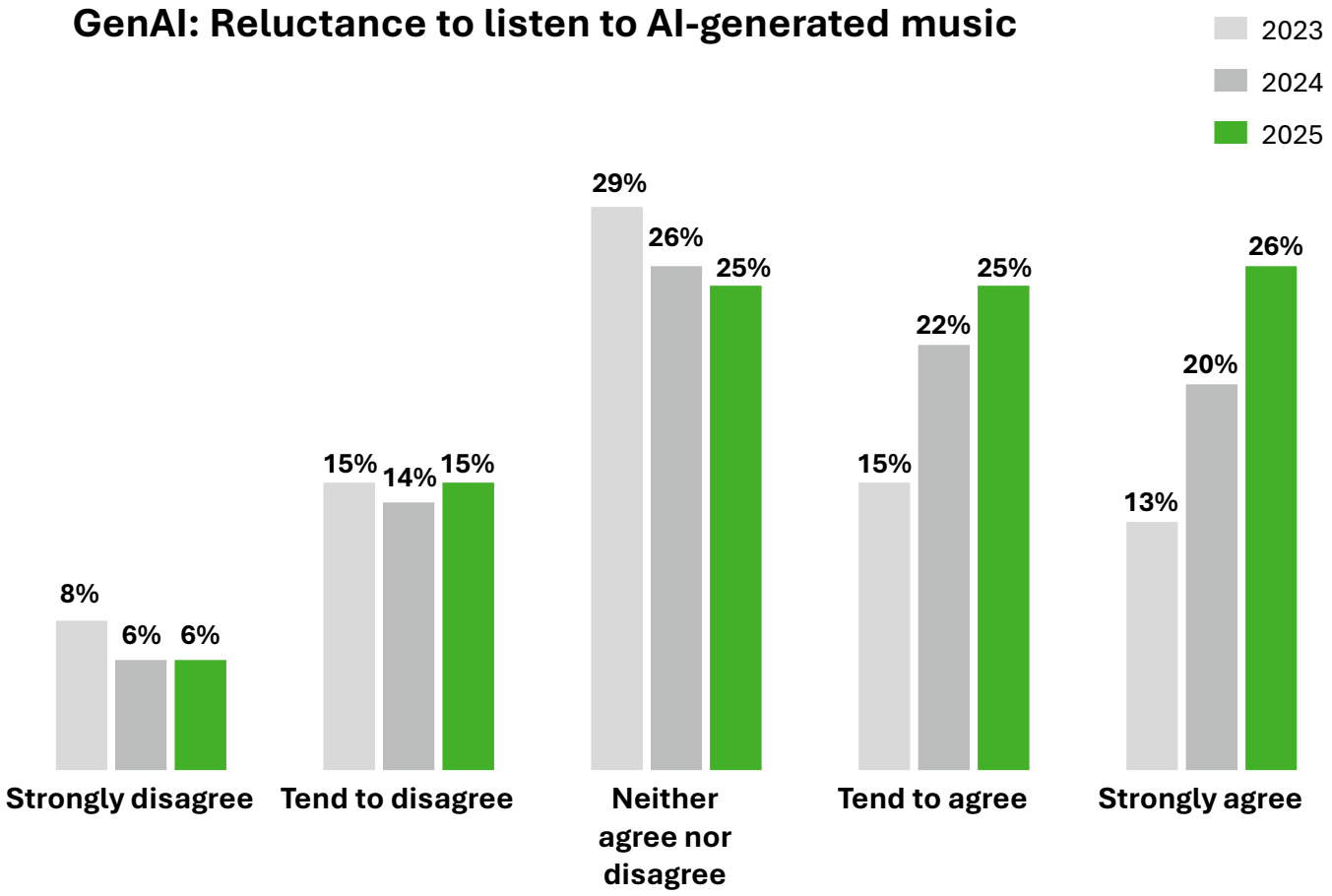
The share of consumers who believe GenAI produces unbiased responses has fallen from 36% in 2023 to 20% in 2025 – a decline of 44% overall.

The decline indicates a rising awareness of the limitations of GenAI, which is becoming increasingly important as 52% of employees use it for work tasks.

Question: To what extent do you agree or disagree with the following statements? - Generative AI responses are unbiased
Weighted base: All respondents aged 18-75 years, 2023 (2000), 2024 (2000), 2025 (2000)
Source: Deloitte Digital Consumer Trends, NL, 2023-2025

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Reluctance towards GenAI produced music grows, and the share of consumers who strongly agree has doubled since 2023



General reluctance towards AI-generated music continues to grow with over 50% of consumers less inclined to listened to GenAI produced music, an increase of 82% since 2023.

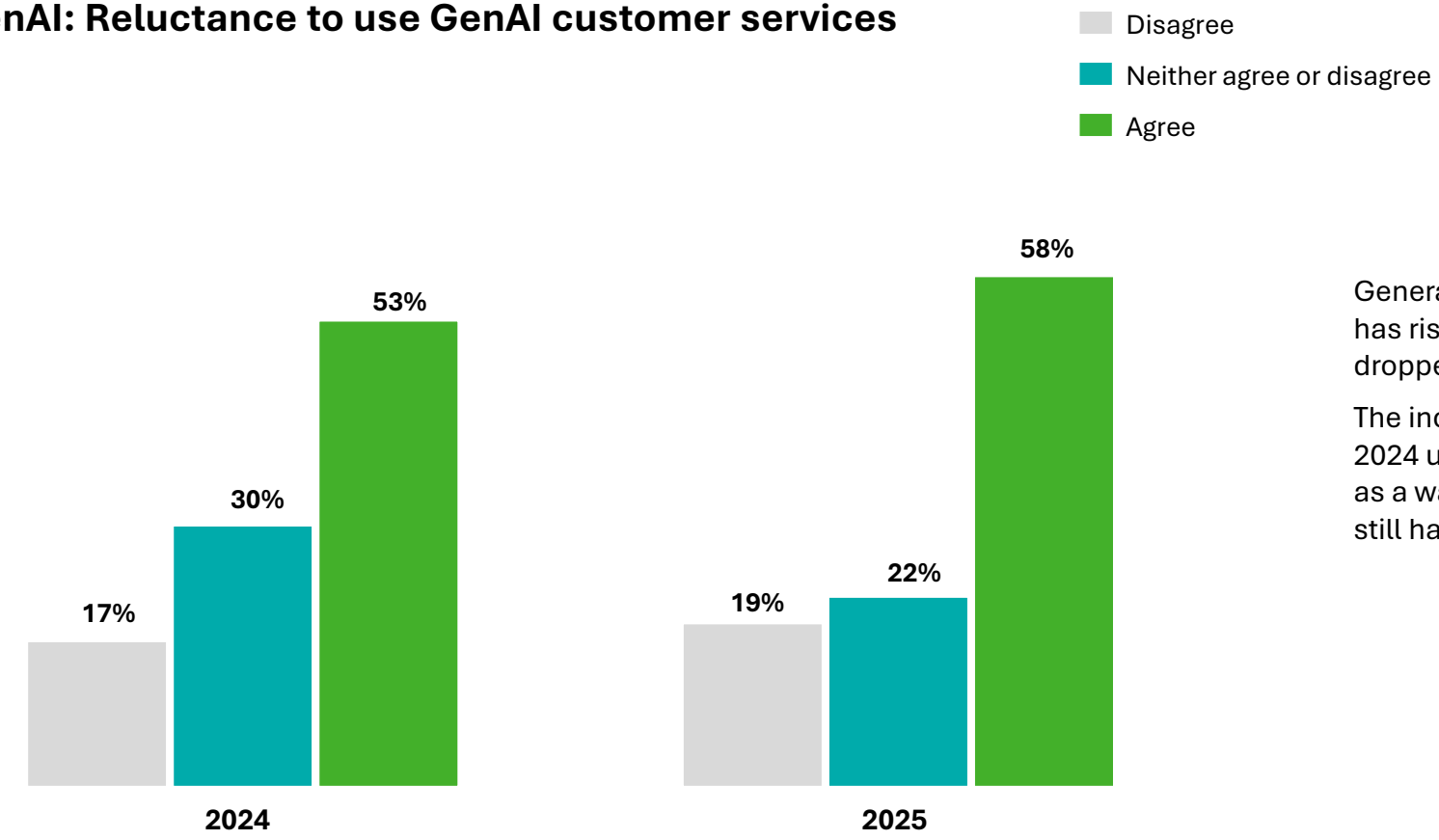
While the reluctance grows, the acceptance to listen to AI-generated music stands at 21% with a slight increase from 2024.

Question: To what extent do you agree or disagree with the following statements? - I would be less inclined to listen to music if I knew it was produced using Generative AI
Weighted base: All respondents aged 18-75 years, 2023 (2000), 2024 (2000), 2025 (2000)
Source: Deloitte Digital Consumer Trends, NL, 2023-2025

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Consumers are increasingly reluctant to use customer services when they know it uses GenAI

GenAI: Reluctance to use GenAI customer services



General reluctance to use GenAI customer services has risen by 9% from 2024, while the neutral group has dropped from 30% to 22%.

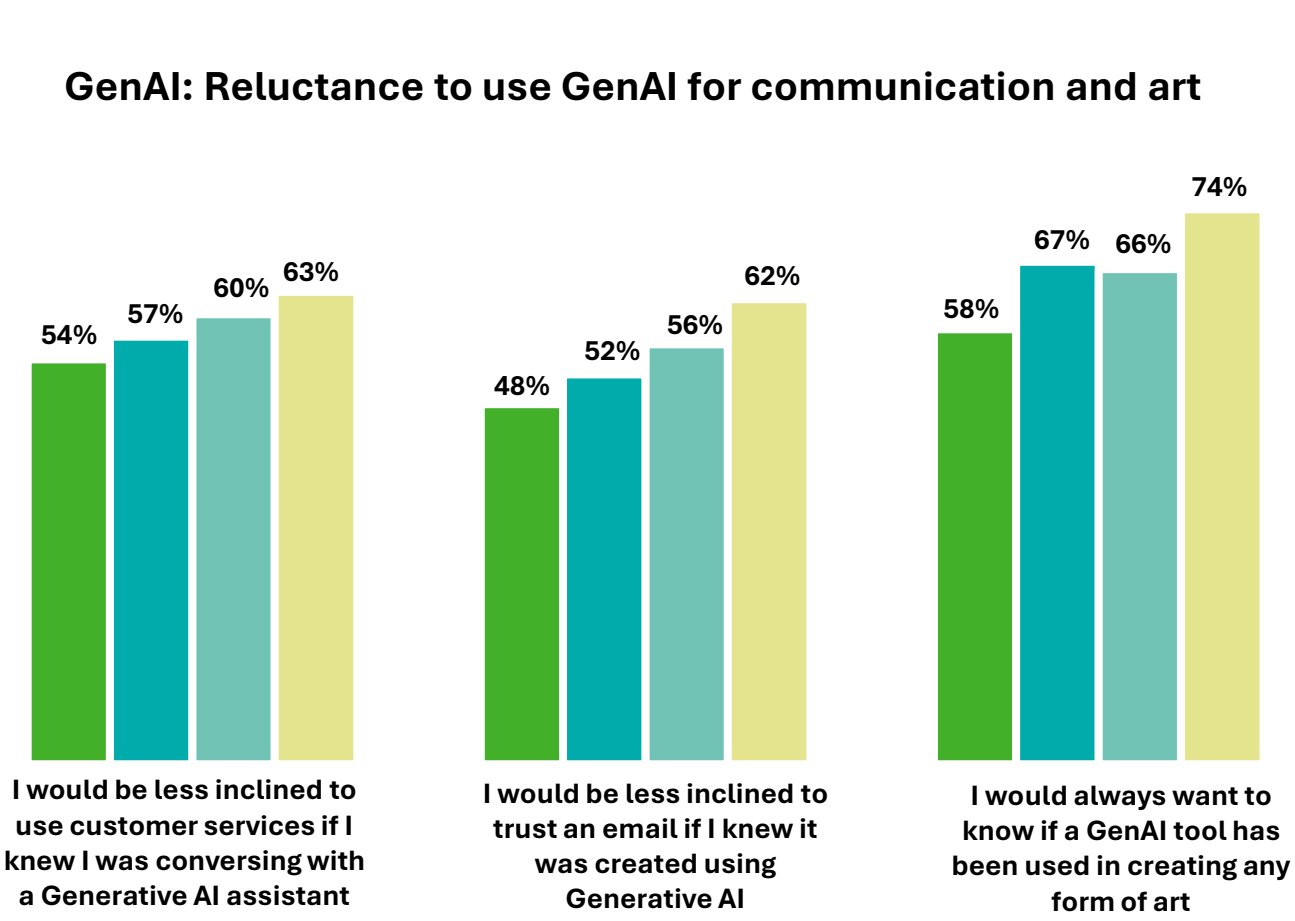
The increase in both reluctance and acceptance from 2024 underlines the importance of positioning GenAI as a way to improve quality, with sensitive interactions still handled by humans.

Question: To what extent do you agree or disagree with the following statements? - I would be less inclined to use customer services if I knew I was conversing with a Generative AI assistant
Weighted base: All respondents aged 18-75 years, 2024 (2000), 2025 (2000)
Source: Deloitte Digital Consumer Trends, NL, 2024-2025

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Younger Dutch consumers are more inclined to trust and use GenAI communication and art services compared to older generations

GenAI: Reluctance to use GenAI for communication and art



Majority (>50%) of Dutch consumers are reluctant to use GenAI services for communication and artistic purposes.

However, the younger generation seems less reluctant in consuming GenAI produced services while older generations are more likely to step back or demand clarity when GenAI is involved.

Question: To what extent do you agree or disagree with the following statements? - I would be less inclined to use customer services if I knew I was conversing with a Generative AI assistant, I would be less inclined to trust an email if I knew it was created using Generative AI, I would always want to know if a GenAI tool has been used in creating any form of art

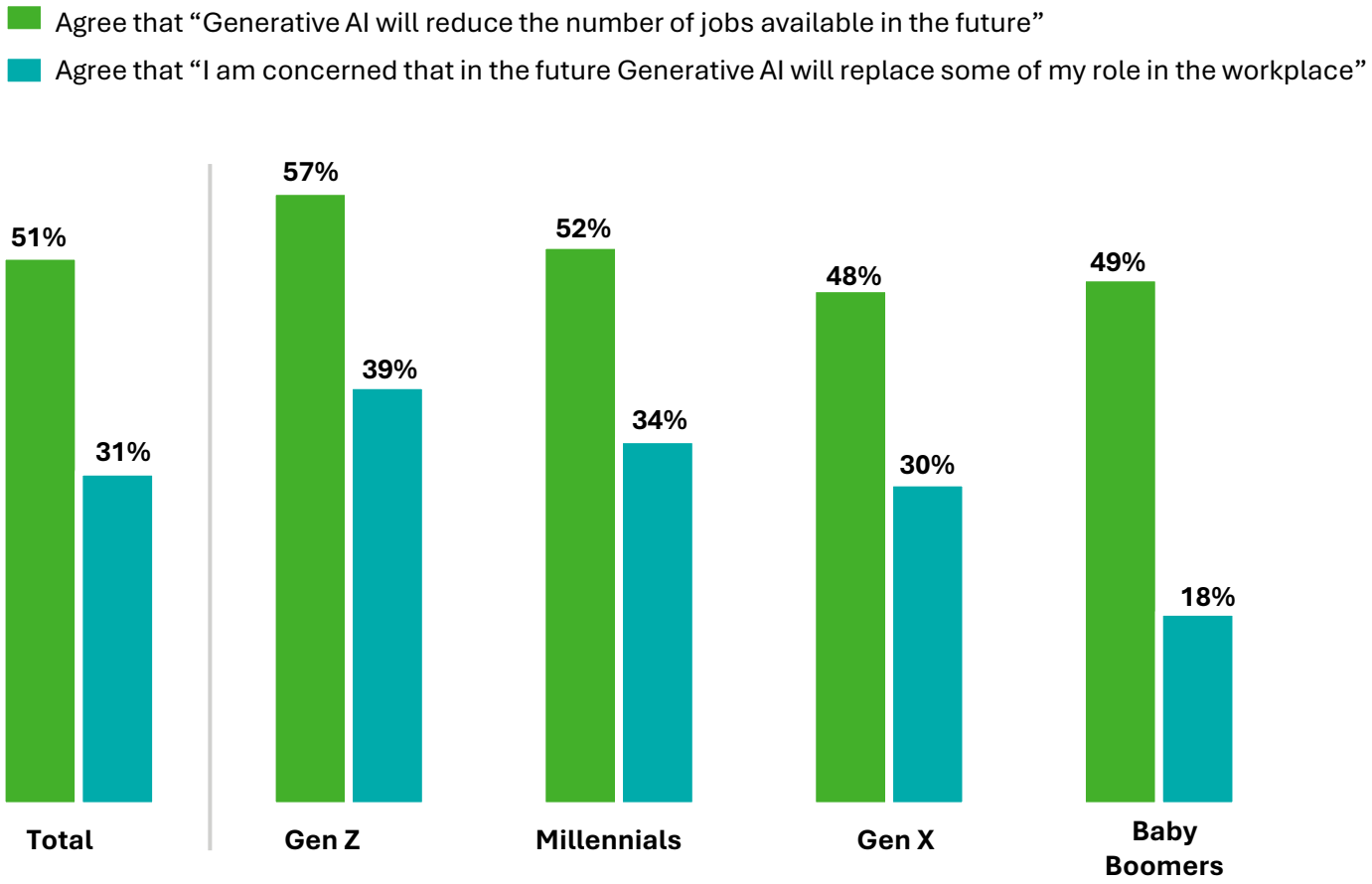
Weighted base: All respondents aged 18-75 years, 2025 (2000)

Source: Deloitte Digital Consumer Trends, NL, 2025

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Gen Z and Millennials are most concerned about the impact of GenAI on jobs and careers

GenAI: reduction and replacement of jobs



More than half of the Dutch consumers believe that GenAI will reduce the number of jobs while one-third are concerned over its impact on their own role.

Younger generations are more likely to see GenAI as a threat to work with around 57% of Gen Z and 52% of Millennials think GenAI will reduce the number of jobs available.

Concern about their own role follows the same pattern, with 39% of Gen Z and 34% of Millennials worried that GenAI will replace parts of their job, versus only 18% of Baby Boomers.

Question: To what extent do you agree or disagree with the following statements? - Generative AI will reduce the number of jobs available in the future, I am concerned that in the future Generative AI will replace some of my role in the workplace
Weighted base: All respondents aged 18-75 years, 2025 (2000)
Source: Deloitte Digital Consumer Trends, NL, 2025

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Devices

Digital Consumer Trends, Dutch Research Edition

Key Insights – Devices

Executive Summary

- Smartphone and laptop remain the core devices for nearly everyone, with ownership at 95% and 83% respectively. This represents a minimal change from 2024 (0% and 1% increase respectively).
- Wearables and audio accessories are the fastest-growing categories, as 68% (up 6% from 2024) now own wireless headphones or earbuds and 38% (up 12% from 2024) own a smartwatch in 2025.
- A total of 9% of respondents stopped using a device, which compares to 22% of the Gen Z respondents who reported doing so.
- Consumers are upgrading their smartphones regularly, with 48% acquiring their current smartphone within the past 18 months (compared to 46% in 2024).

Strategic Implications

- With the device landscape largely plateauing, Tech, Media and Telecom companies need to drive growth within the existing device ecosystem, for example through new and more integrated services.

Smartphone ownership
(among all consumers)

95%

▶ 0% since 2024

Smartwatch ownership
(among all consumers)

38%

▲ 12% since 2024

Stopped using a device
(among all consumers)

9%

Bought Phone in last 18 months
(among all consumers)

48%

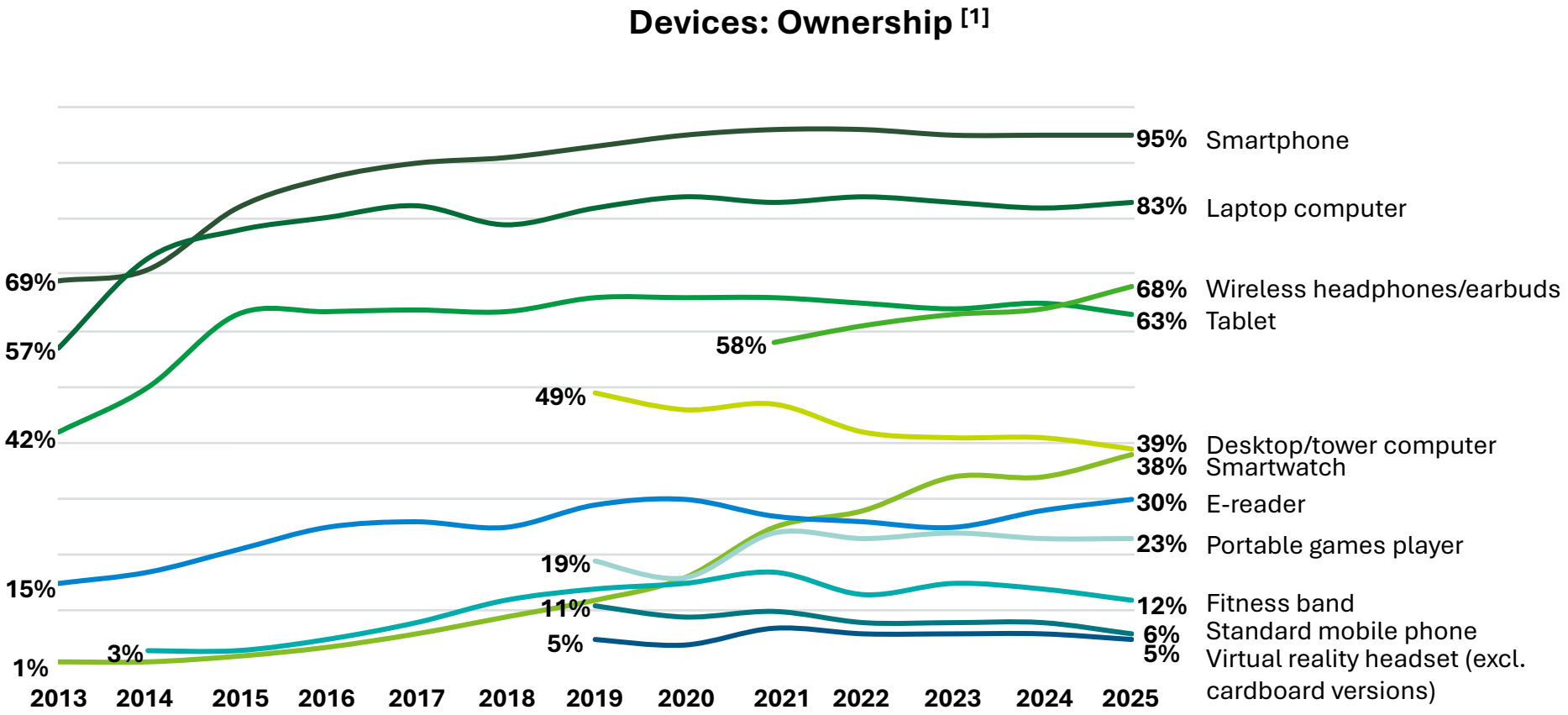
▲ 4% since 2024

Device ownership has remained stable, only wireless headphone and smart watch ownership are growing

Device ownership remains broadly stable, dominated by smartphones at 95% and laptops at 83%.

Ownership of wireless headphones/earbuds is now 68% in 2025, an increase from 64% in 2024. These accessories have now overtaken tablets.

Smartwatch adoption has continued to climb to 38% in 2025, up from 34% in 2024.



Question: Which, if any, of the following devices do you own or have ready access to?
Weighted base: All respondents aged 18-75 years, 2019 (2,000), 2020 (2,000), 2021 (2,000), 2022 (2,000), 2023 (2,000), 2024 (2,000)
[1] Over the years the questionnaire question scope has broadened. Hence why certain devices have only limited historically data
Source: Deloitte Digital Consumer Trends, NL, 2013-2025

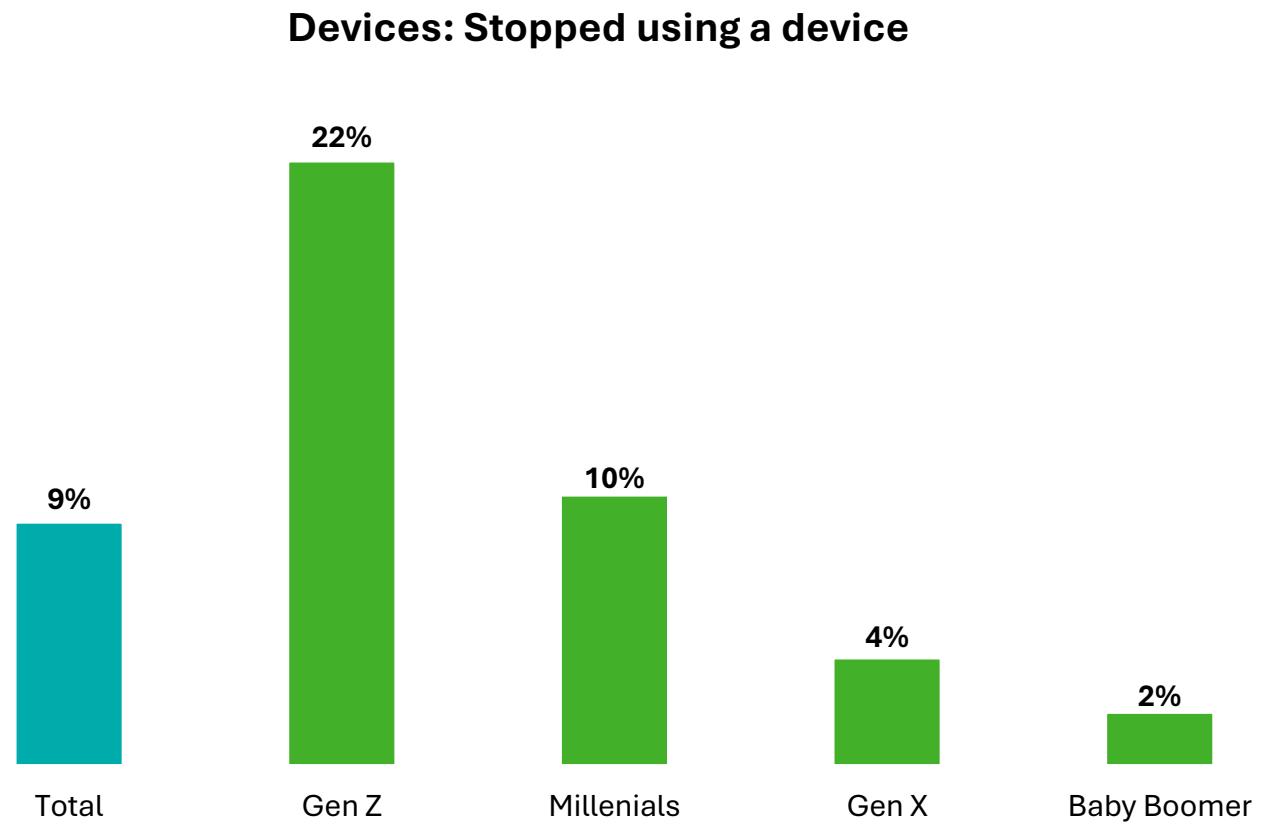
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Gen Z consumers have stopped using a digital device more frequently than older generations

Nearly one in ten (9%) of all respondents have stopped using a digital device in the past year.

The trend is significantly driven by Gen Z, who report the highest rate with 22% of this generation have stopped using a device in the past year.

This behavior aligns with findings from the 'Online' section, which highlights that Gen Z consumers also delete social media accounts most often. This may indicate a conscious move among younger generations to cut back on screen time and digital engagement.



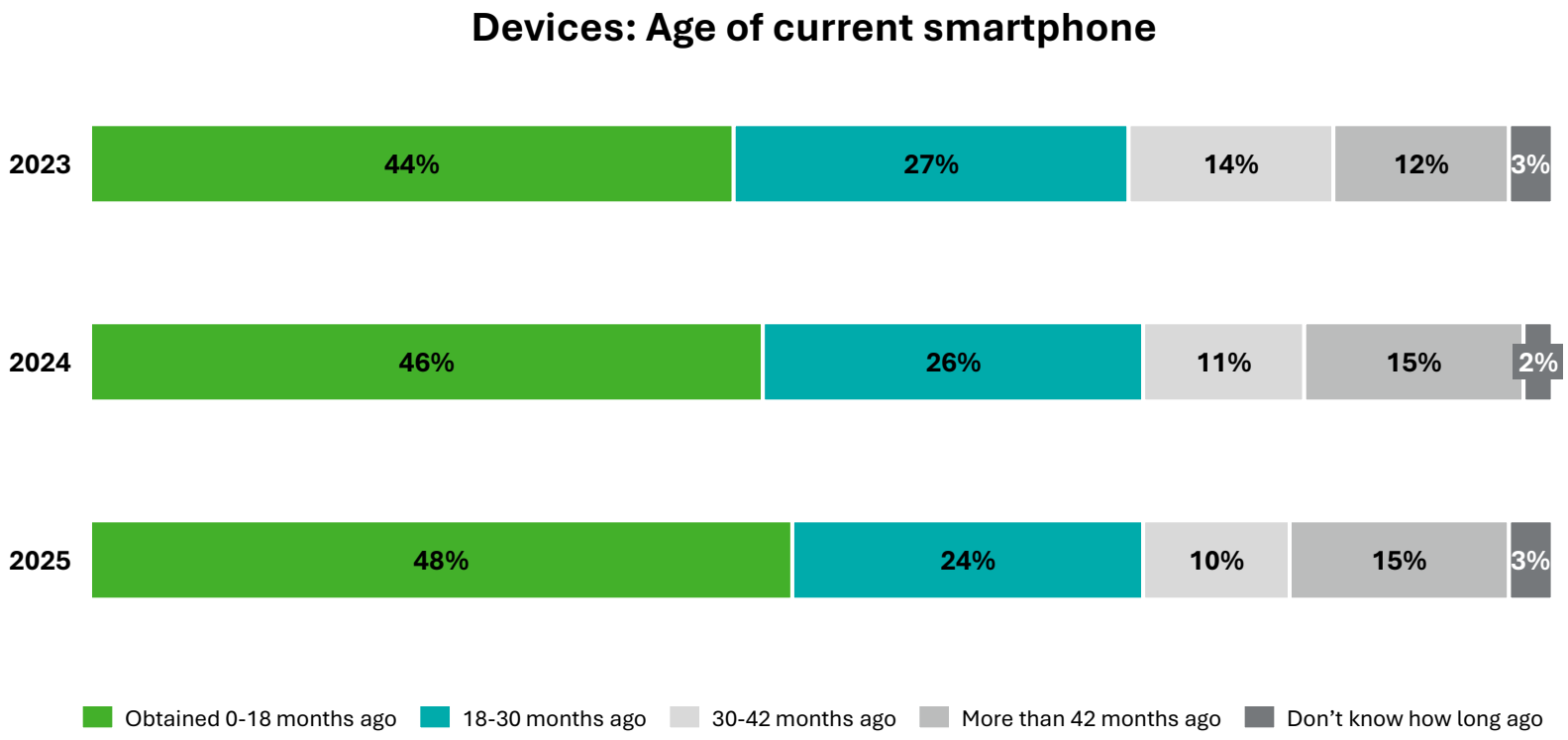
Question: Which, if any, of the following have you personally done in the last 12 months? - stopped using a digital device
Weighted base: All respondents aged 18-75 years, 2025 (2000)
Source: Deloitte Digital Consumer Trends, NL, 2025

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Smartphone replacement cycles are shortening, with 48% obtaining their current device in the past 18 months compared with 44% in 2023

Consumers have been acquiring phones more quickly. In 2023, 44% had obtained their smartphone in the last 18 months, whereas this number has increased to 48% in 2025.

In 2025, about half (49%) of smartphone owners have had their current device for more than 18 months.



Question: When did you buy or receive your current phone?
Weighted base: All respondents aged 16-75, years 2025 (976), 2024 (953), 2023 (970); Respondents who have a phone or smartphone
Source: Deloitte Digital Consumer Trends, NL, 2025

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Networks

Digital Consumer Trends, Dutch Research Edition

Key Insights – Networks

Executive Summary

- More than one-third of Dutch consumers are unaware of their broadband speed suggesting that factors other than raw speed also influences their experience.
- 24% of respondents use mobile data as their primary household connection, while this figure is 34% for Gen Z respondents.
- Overall broadband satisfaction remains high, with 84% reporting at least being "fairly satisfied." Younger cohorts are less satisfied, with Gen Z at 79% and Millennials at 81%, compared with Baby Boomers at 90%.
- 5G network accessibility rose sharply in 2025. 73% of respondents reported having access to 5G network, up from 59% in 2024.

Strategic Implications

- In line with results from earlier years, there is unawareness and indifference about broadband speeds (36% unaware) whilst broadband reliability and stability are cited as key influencers. For Telecom companies, this implies a value proposition around broadband reliability and stability will be more compelling than speed
- High usage of mobile as primary household connection, especially across younger generations, shows potential for Fixed Wireless Access solutions

Don't know broadband speed
(among all consumers)
36%
▼ 2% since 2024

Mobile as primary connection
(among all consumers)
24%
▲ 14% since 2024

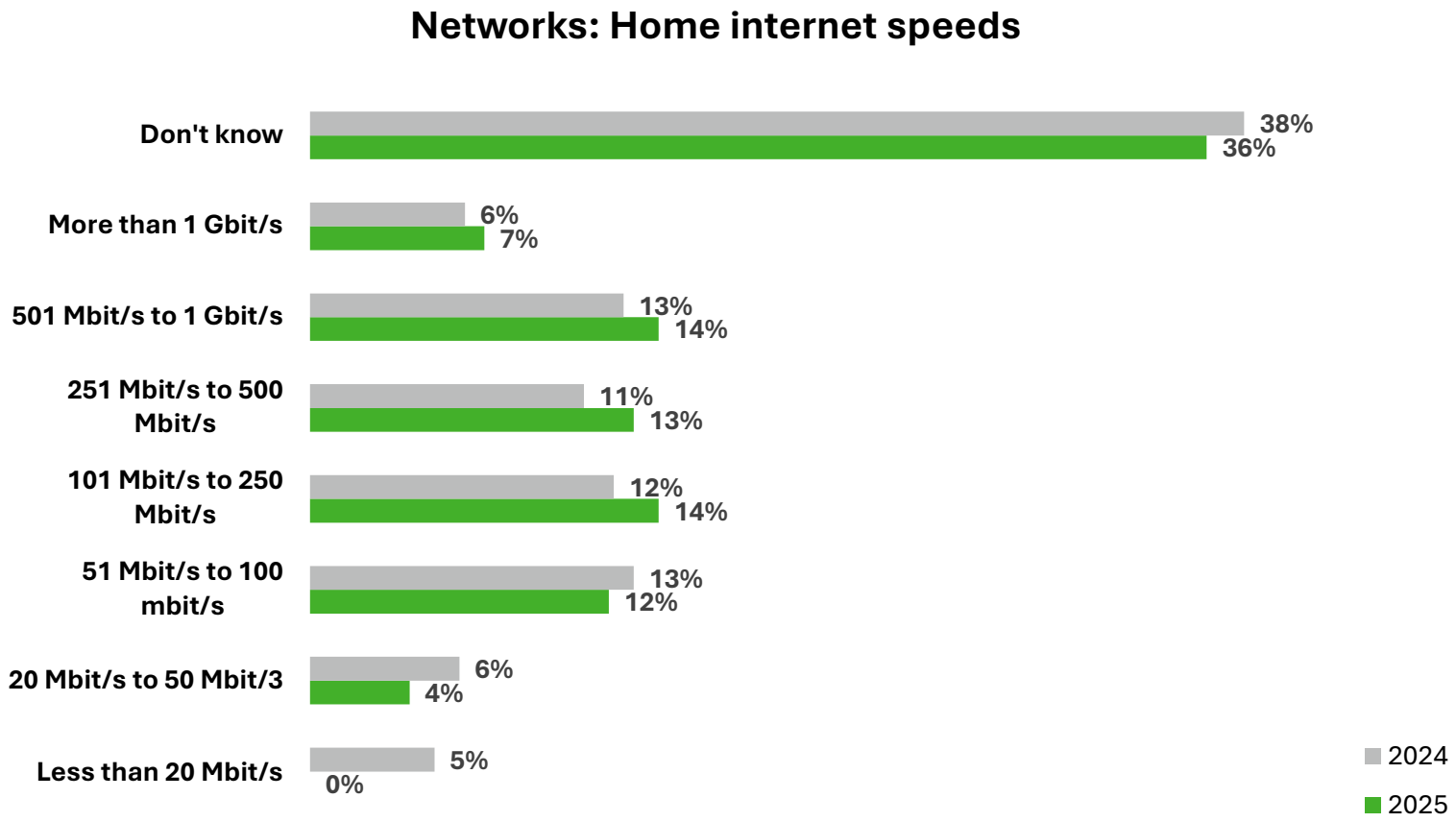
Broadband satisfaction
(among consumers with a broadband connection)
84%
▼ 1% since 2024

Access to 5G network
(among consumers with a smartphone)
73%
▲ 14% since 2024

36% of Dutch consumers who have internet access at home are unaware of their home internet speed

36% of consumers do not know what their home broadband speed is, possibly because speed is not a main concern or because someone else in the household arranged the broadband contract.

This trend is particularly evident among women, with 53% uncertain compared to less than half that percentage for men (21%).



Question: How fast is the home internet connection you currently have? Please think about the speed as advertised, rather than the speed you actually get.
Weighted base: All respondents aged 18-75 years, 2024 (1429), 2025 (1,537); Respondents who have internet access at home
Source: Deloitte Digital Consumer Trends, NL, 2024-2025

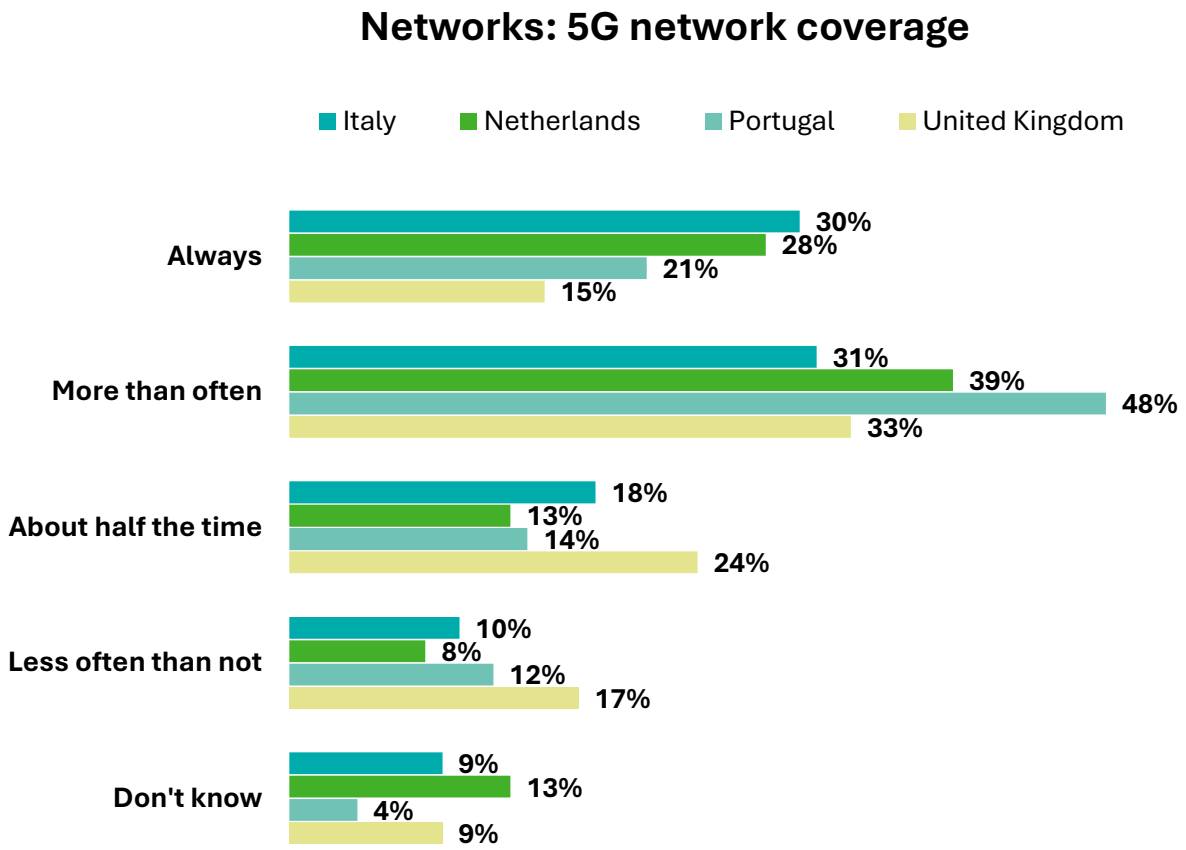
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Netherlands ranks second for always-available 5G network access (28%) behind Italy (30%)

Based on consumer perception, compared with the UK, Italy and Portugal, the Netherlands ranks second for 'always' having 5G network coverage (28%) and likewise ranks second for 'more than often' coverage (39%).

Nevertheless, more respondents in the Netherlands do not know if they have 5G network coverage compared to other countries.

Compared to 2024, consumers are experiencing increased 5G coverage. Among all consumers, the share reporting 5G coverage rose by 14%, from 59% in 2024 to 73% in 2025.



Question: Do you have 5G network on your main phone?; How often, if at all, do you get 5G network coverage?
Weighted base: All respondents aged 18-75 years, NL (1416), UK (2402), Italy (1078), Portugal (680); Respondents that got 5G network coverage
Source: Deloitte Digital Consumer Trends, NL, 2025; Deloitte Digital Consumer Trends, PT, 2025; Deloitte Digital Consumer Trends, IT, 2025; Deloitte Digital Consumer Trends, UK, 2025

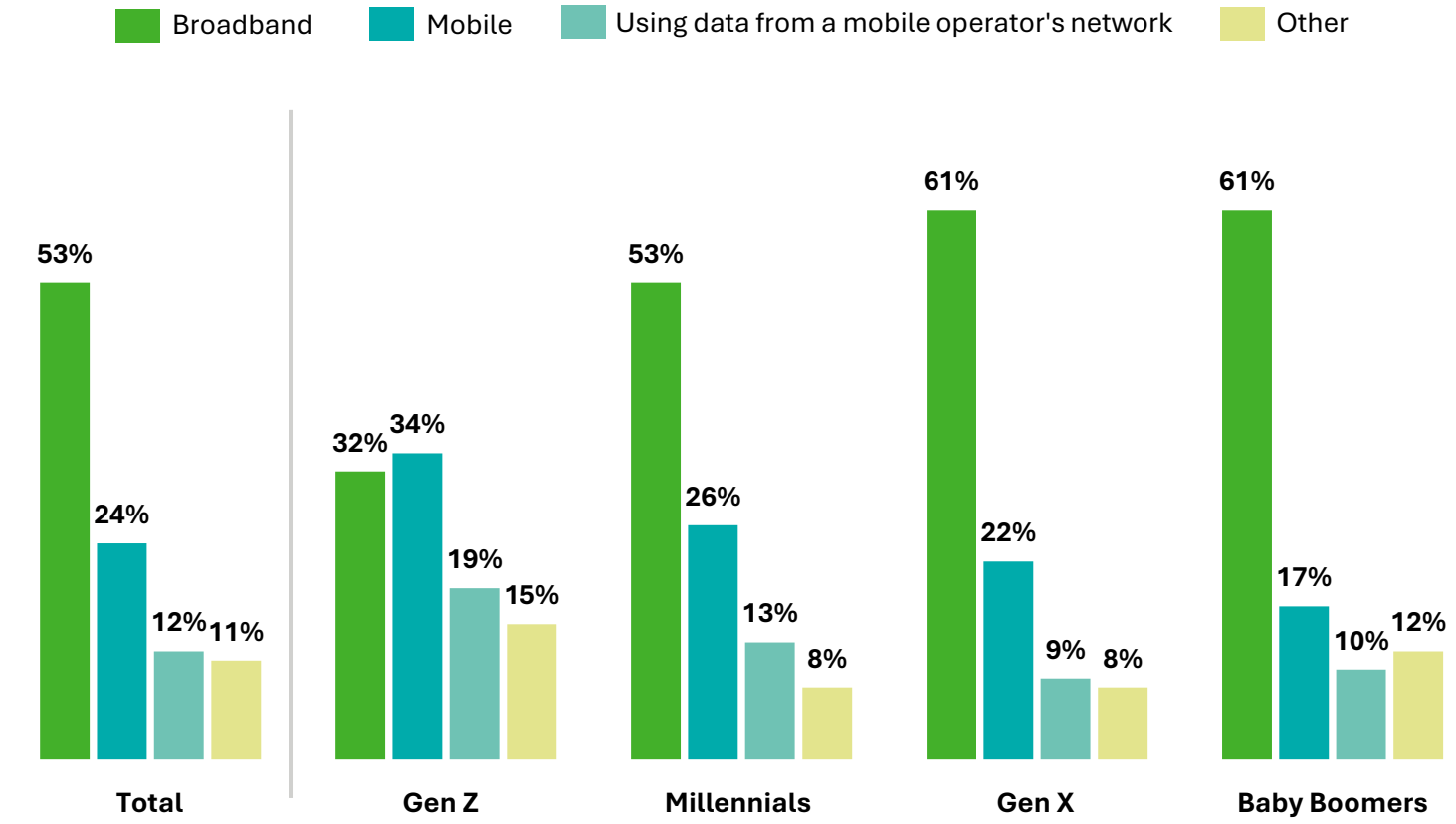
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More than a third (34%) of Gen Z consumers use mobile as their primary household connection

More than half (53%) of the Dutch consumers use home broadband as their primary connection, with Gen Z reporting the lowest share at 32%.

Students use home broadband connection less (33%) than working and non-working respondents (53% and 55% respectively). While men use home broadband more than women (63% and 43% respectively).

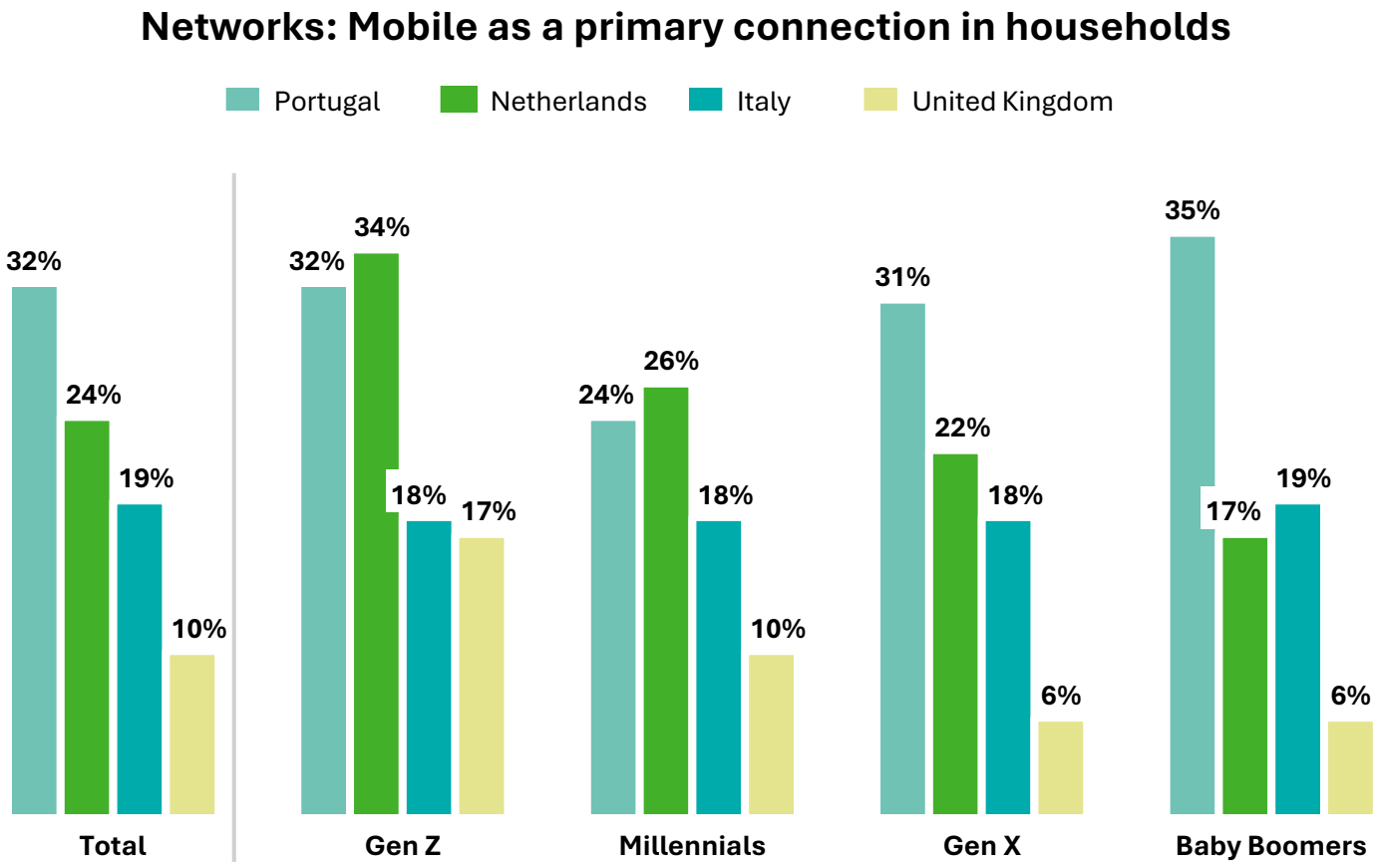
Networks: Source of primary connection in households



Question: Which, if any, of the following types of internet or home broadband connection is the MAIN one you use in your household?
Weighted base: All respondents aged 18-75 years, 2025 (2,000)
Source: Deloitte Digital Consumer Trends, NL, 2025

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Almost 25% of Dutch consumers use mobile as their main household connection more than twice as much as consumers from the UK



Netherlands (25%) stands second for using mobile as their primary internet connection behind Portugal (29%) but much ahead of countries like Italy and UK.

Netherlands ranks first among the young consumers with more than 30% using mobile as their primary internet connection.

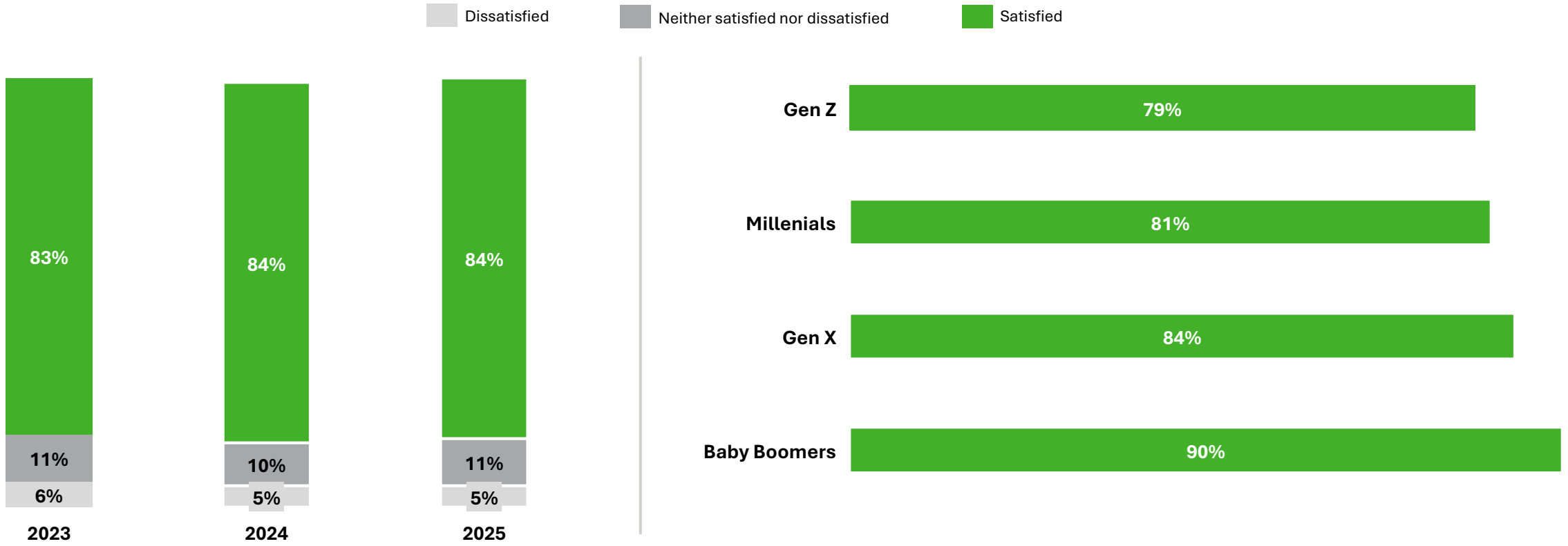
Question: Which, if any, of the following types of internet or home broadband connection is the MAIN one you use in your household?
Weighted base: All respondents aged 18-75 years, 2025 NL (2,000), IT (2000), PT (1000), UK (4150)
Source: Deloitte Digital Consumer Trends, NL, 2025; Deloitte Digital Consumer Trends, PT, 2025; Deloitte Digital Consumer Trends, IT, 2025; Deloitte Digital Consumer Trends, UK, 2025

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Broadband satisfaction levels seem to stabilize with more than four in five (84%) of the consumers being satisfied with their broadband

Gen Z and the Millennials are the "least" satisfied, with 79% and 81% respectively expressing satisfaction, which is lower than the Baby Boomers, who are the most satisfied with 90% satisfaction.

Networks: Satisfaction with internet connection



Question: How satisfied or dissatisfied are you with your internet connection overall?
Weighted base: All respondents aged 18-75 years, 2025 (1,537); Respondents who have internet access at home
Source: Deloitte Digital Consumer Trends, NL, 2025

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Subscriptions

Digital Consumer Trends, Dutch Research Edition

Key Insights – Subscriptions

Executive Summary

- Video and music streaming remain the dominant paid services, used by 73% and 52% of all respondents respectively. Gen Z is the heaviest user group, with 89% using video and 81% using music streaming.
- Paid subscriptions for traditional TV access has also jumped to 34% (10% increase from 2024)
- The subscription market is showing rotational churn as 25% subscribed to a video service and 20% canceled one in the past year, while 52% of the respondents made no changes to their subscriptions.
- Younger consumers are most actively joining and canceling a subscription service, which points to lower loyalty among Gen Z and Millennials.
- Price and perceived value drive many cancellations. About 49% of respondents who cancelled a subscription said it was too expensive or that they were spending too much on subscriptions.
- Majority of the consumers subscribe to the video-streaming services directly (76%) while only 17% of the consumers get their video streaming through a third-party service providers.

Strategic Implications

- Media companies can address rotational churn — especially among younger consumers — by creating compelling bundles that increase perceived value and usage, thereby reducing subscription cancellations (20%).
- Opportunity for telecom companies and media companies to win a larger share of subscriptions, as only 17% access video services via third-party provider compared with 76% who subscribe directly.

Video streaming access
(among all consumers)
73%
▲ 4% since 2024

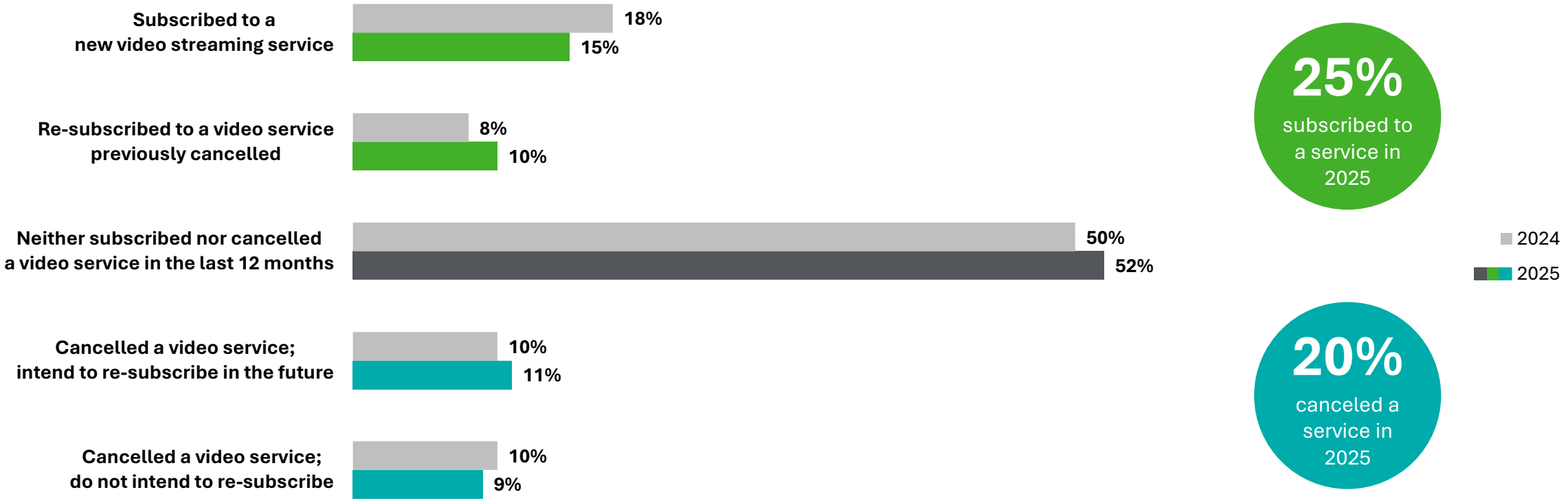
Pay for TV access
(among all consumers)
34%
▲ 10% since 2024

Canceled video subscription due to price
(among consumers that canceled a subscription)
27%
▶ 0% since 2024

Subscribe to video streaming service via a 3rd party provider
(among consumers with video streaming access)
17%

The subscription market is showing rotational churn as 25% subscribed to a video service and 20% canceled one in the past year

Subscriptions: Joining and canceling a video streaming service



Question: In the last 12 months, have you or your household subscribed to any paid subscriptions for a video streaming service, or canceled any existing ones?
Weighted base: All respondents aged 18-75 years, 2024 (2,000), 2025 (2,000)
Source: Deloitte Digital Consumer Trends, NL, 2024-2025

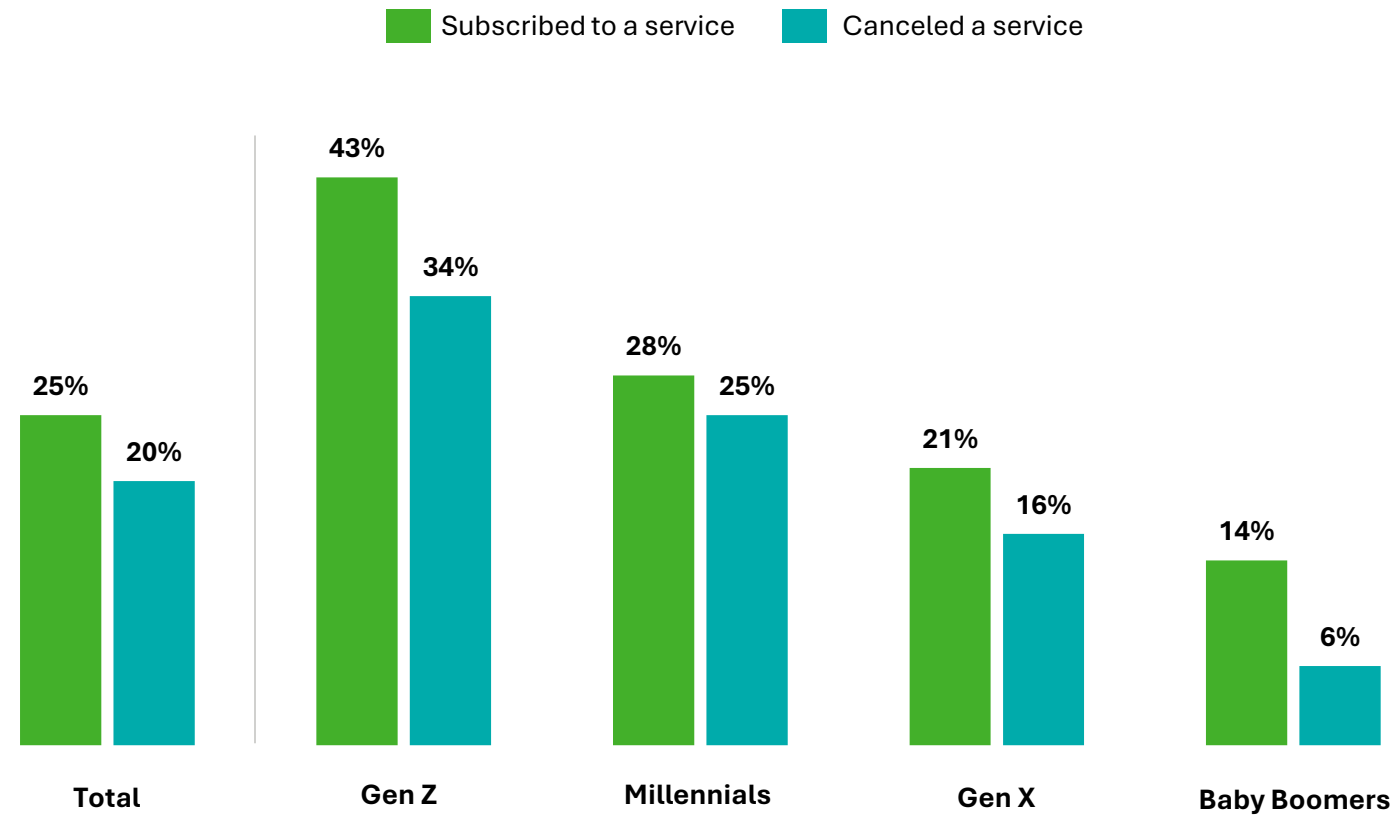
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Younger generations are more likely to subscribe and cancel video streaming services, indicating lower loyalty

43%

Of Gen Z consumers newly subscribed or re-subscribed to a video streaming service

Subscriptions: Joining and canceling a video streaming service



Question: In the last 12 months, have you or someone else in your household subscribed to any paid subscriptions for a video streaming service?; You mentioned you have cancelled a paid subscription for a video streaming service in the last 12 months, why did you cancel?

Weighted base: All respondents aged 18-75 years, 2025 (2,000)

Source: Deloitte Digital Consumer Trends, NL, 2025

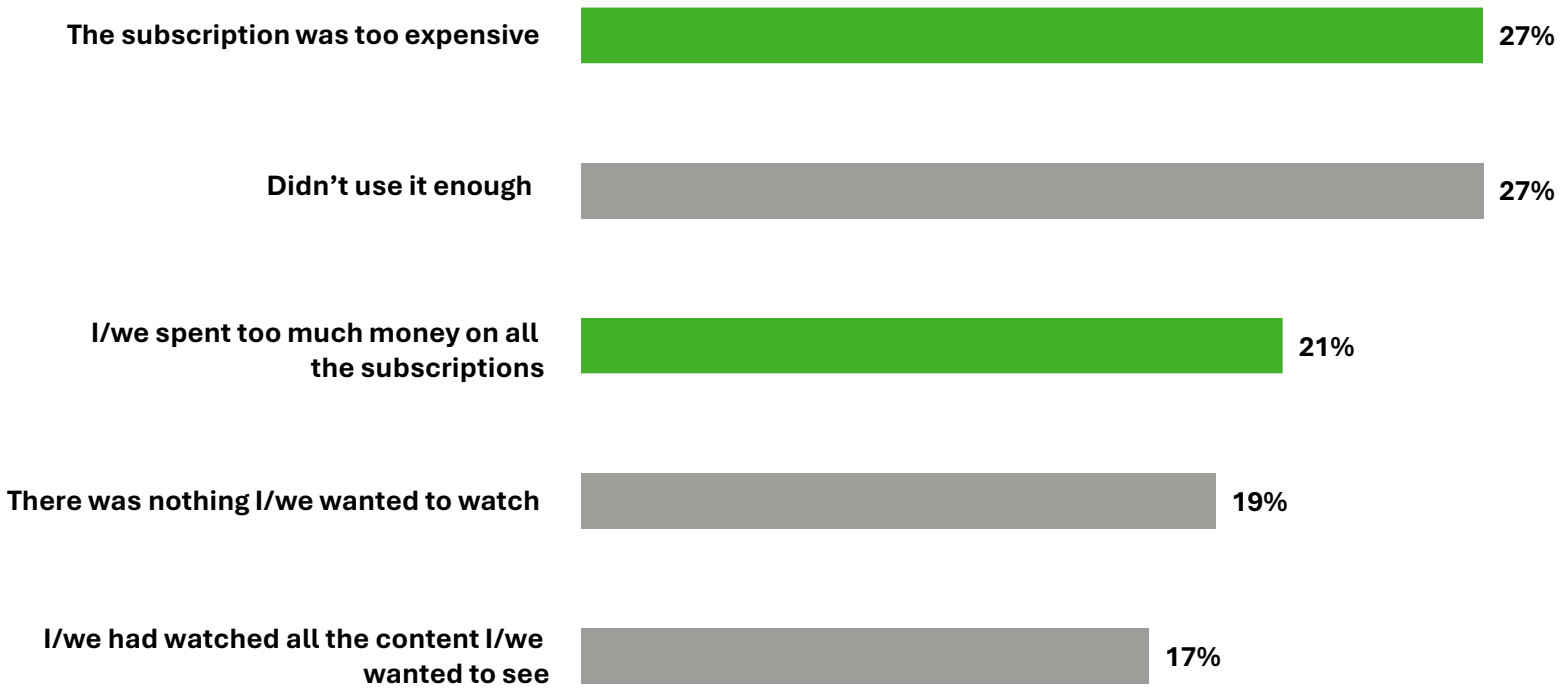
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Among all consumers that canceled a subscription, 48% have price-related reasons

48%

Of consumers who canceled a subscription said they did so because the service was too expensive or felt that they did not use it enough

Subscriptions: Cancellation reasons for video streaming services



Question: You mentioned you have canceled a paid subscription for a video streaming service in the last 12 months, why did you cancel?
Weighted base: All respondents aged 18-75 years, 2025 (506); Respondents who have canceled a video streaming subscription service
Source: Deloitte Digital Consumer Trends, NL, 2025

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The digital subscription market is still growing, and video and music streaming remain the most popular subscriptions

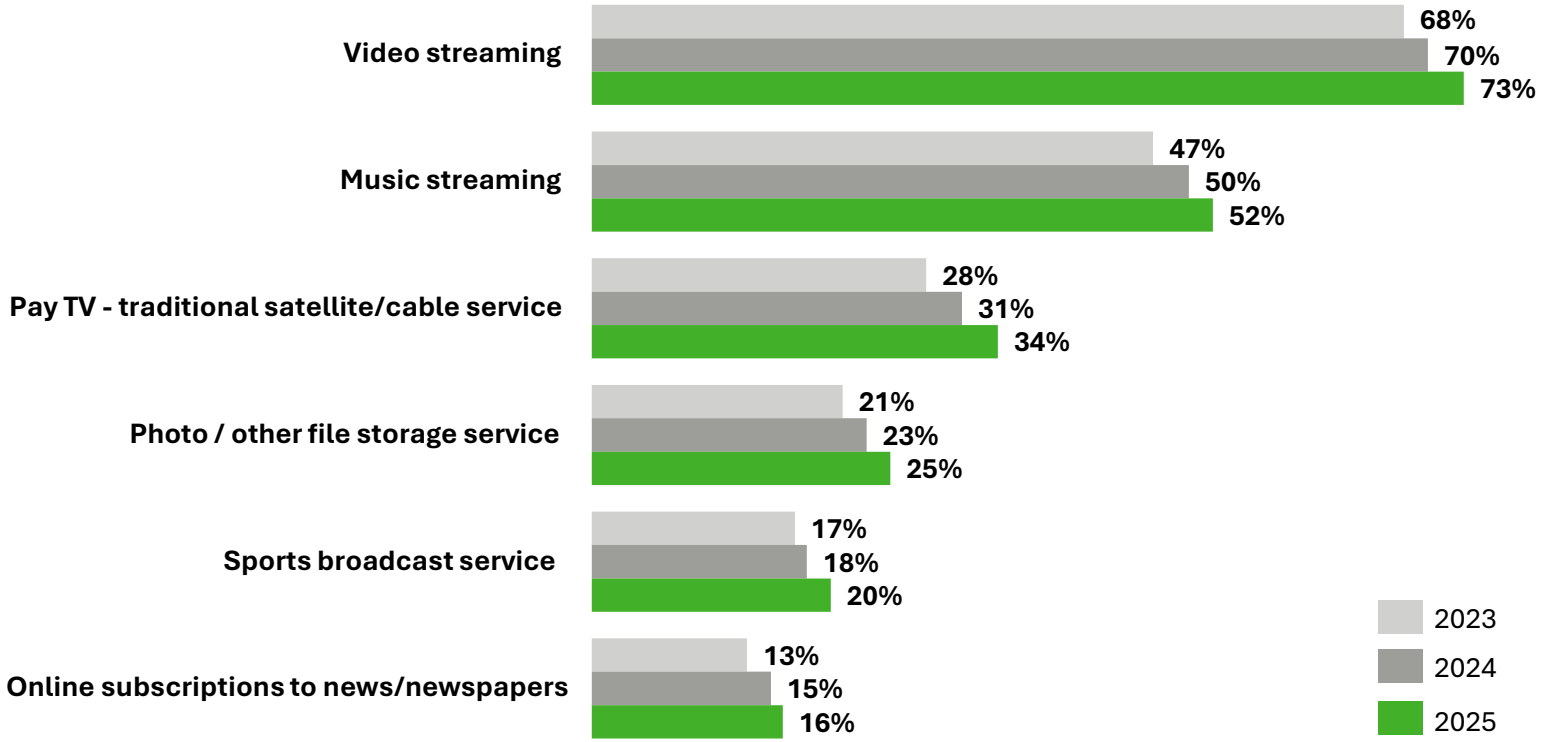
Overall, subscription access has increased consistently across the various categories, roughly averaging a 7% rise from 2024 to 2025.

The sports broadcast subscription category is the fastest growing, with access rising 10% from 2024 to 2025.

Gen Z lead in sports broadcast subscriptions, with 30% having access versus 14% of Baby Boomers.

Gen X show the highest share of Pay TV (37%), compared with the lowest share among Gen Z (26%).

Subscriptions: Access per category



Question: Which, if any, of the following paid digital subscription services do you have access to?; Thinking now about paid services or subscriptions, which, if any, of the following do you have access to?
Weighted base: All respondents aged 18-75 years, 2023 (2,000), 2024 (2,000), 2025 (2000)
Source: Deloitte Digital Consumer Trends, NL, 2023-2025

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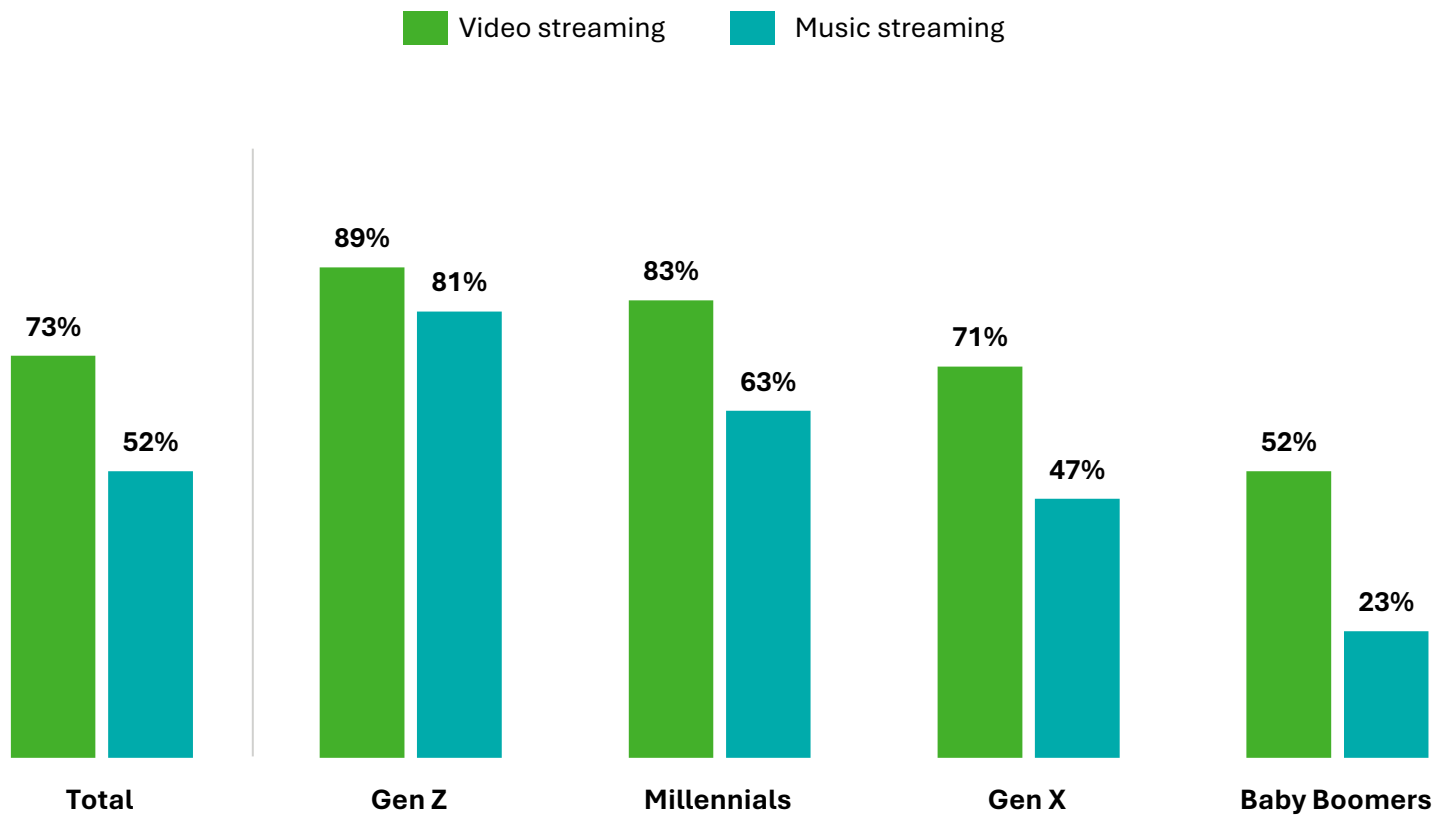
Baby Boomers have significantly less access to video and music subscriptions compared to younger generations

In 2025, Baby Boomers are least likely to have access to video and music streaming (52% and 23%, respectively), while Gen Z are most likely to have access to these platforms (89% and 81%).

Students have access to music streaming services the most (83%) compared to working respondents (50%) and non-working respondents (25%)

Non-working respondents have access to video streaming services the least (55%) compared to working respondents (78%) and students (86%).

Subscriptions: Access to video and music streaming

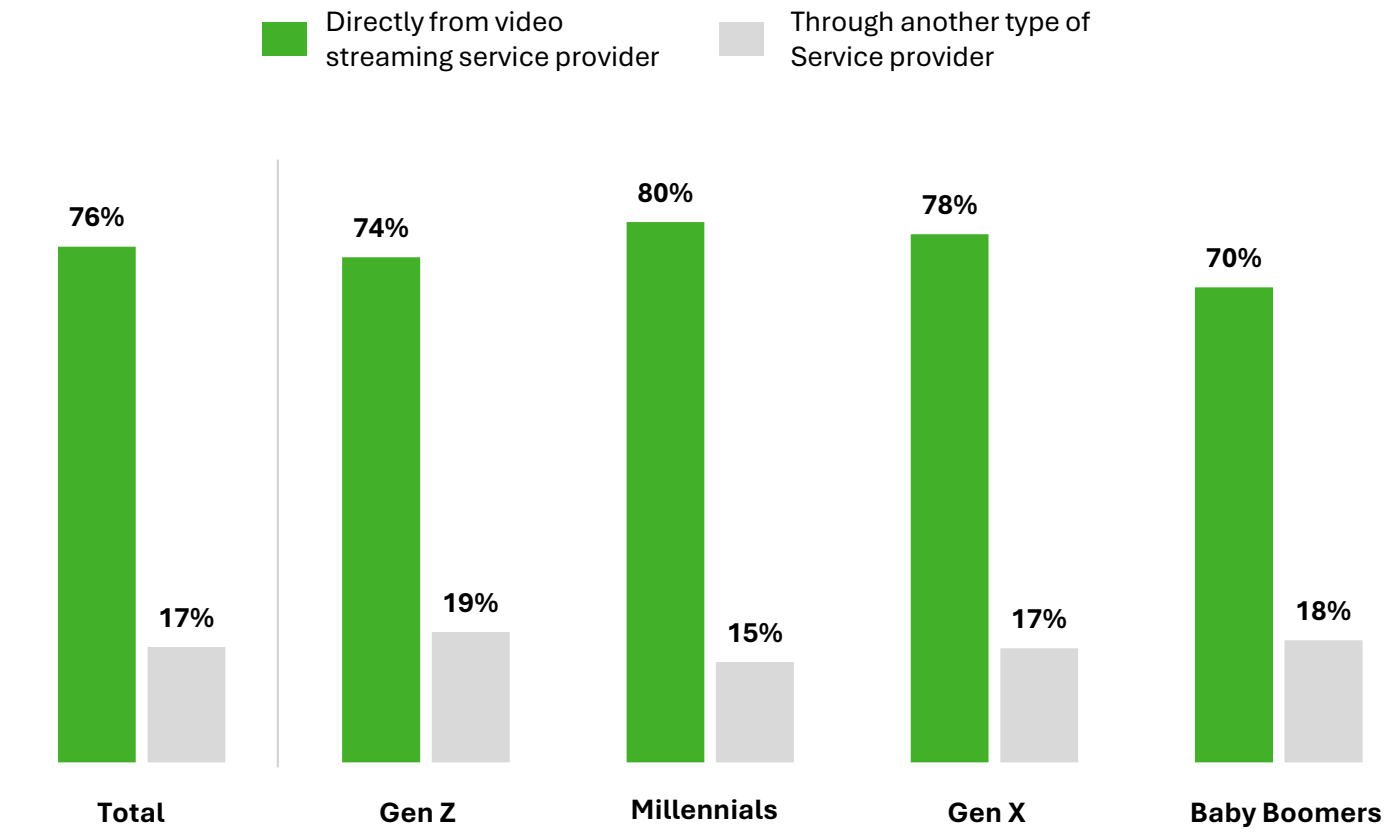


Question: Which, if any, of the following paid digital subscription services do you have access to?
Weighted base: All respondents aged 18-75 years, 2025 (2,000)
Source: Deloitte Digital Consumer Trends, NL, 2025

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Most consumers get their subscription to video-streaming services directly from the platform rather than as part of a bundle from another service provider

Subscriptions: Video streaming access through provider



Question: Which, if any, of the following best describes how you/the account holder took out each of the following paid video streaming subscriptions?
Weighted base: All respondents aged 18-75 years, 2025 (1127); Respondents who have access to paid video subscription services
Source: Deloitte Digital Consumer Trends, NL, 2025

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Online

Digital Consumer Trends, Dutch Research Edition

Key Insights – Online

Executive Summary

- 21% of respondents deleted a social media app and 19% joined one in the past 12 months with Gen Z showing the most movement at 34% and 27% respectively. This suggests that individuals are frequently moving and/or rejoining social media platforms.
- Reasons for removing social media apps differ per generation. Baby Boomers point to misinformation (26%) and advertising (30%) while Gen Z point to time use (28%), stopped using the app (25%) and mental-health concerns (27%).
- Many respondents are de-digitizing, with 51% turning off notifications in 2025 and 16% setting screen-time limits to manage usage.
- Dutch respondents generally favor earlier access to smartphones and social media than some other Europeans, though they still broadly support secured age verification and usage limits.

Strategic Implications

- The trend of consumers actively curating their digital lives - evidenced by 21% deleting social media apps and 51% turning off notifications - makes transparency and quality assurance essential to gain consumer trust. This creates an opportunity for media companies to differentiate not on content volume but on trust, by investing in high-quality trusted curation to filter out digital noise.

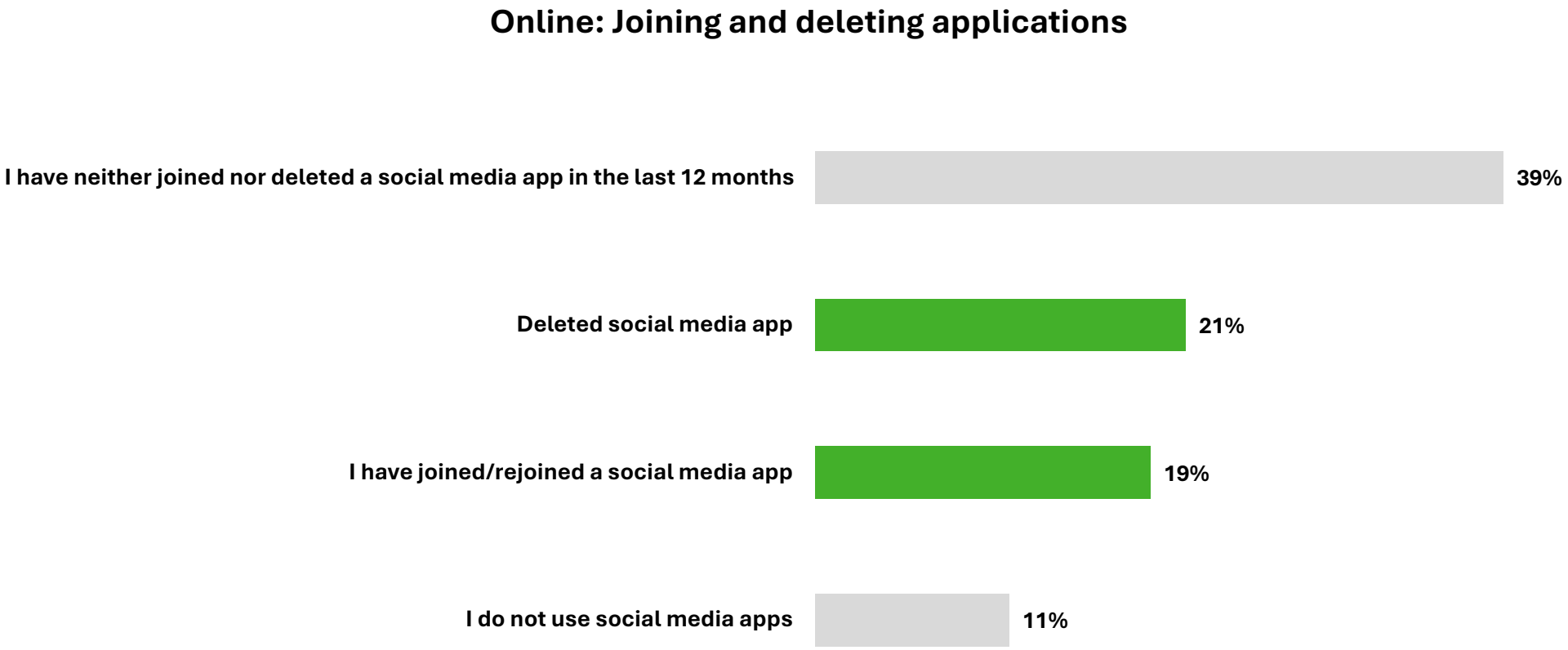
Deleted a social media app
(among all consumers)
21%

Switched off notifications on social media apps to reduce digital exposure
(among all consumers)
51%

Acceptable age for social media access is 12–15 years
(among all consumers)
50%

Favor social media ban below 16 years old
(among all consumers)
62%

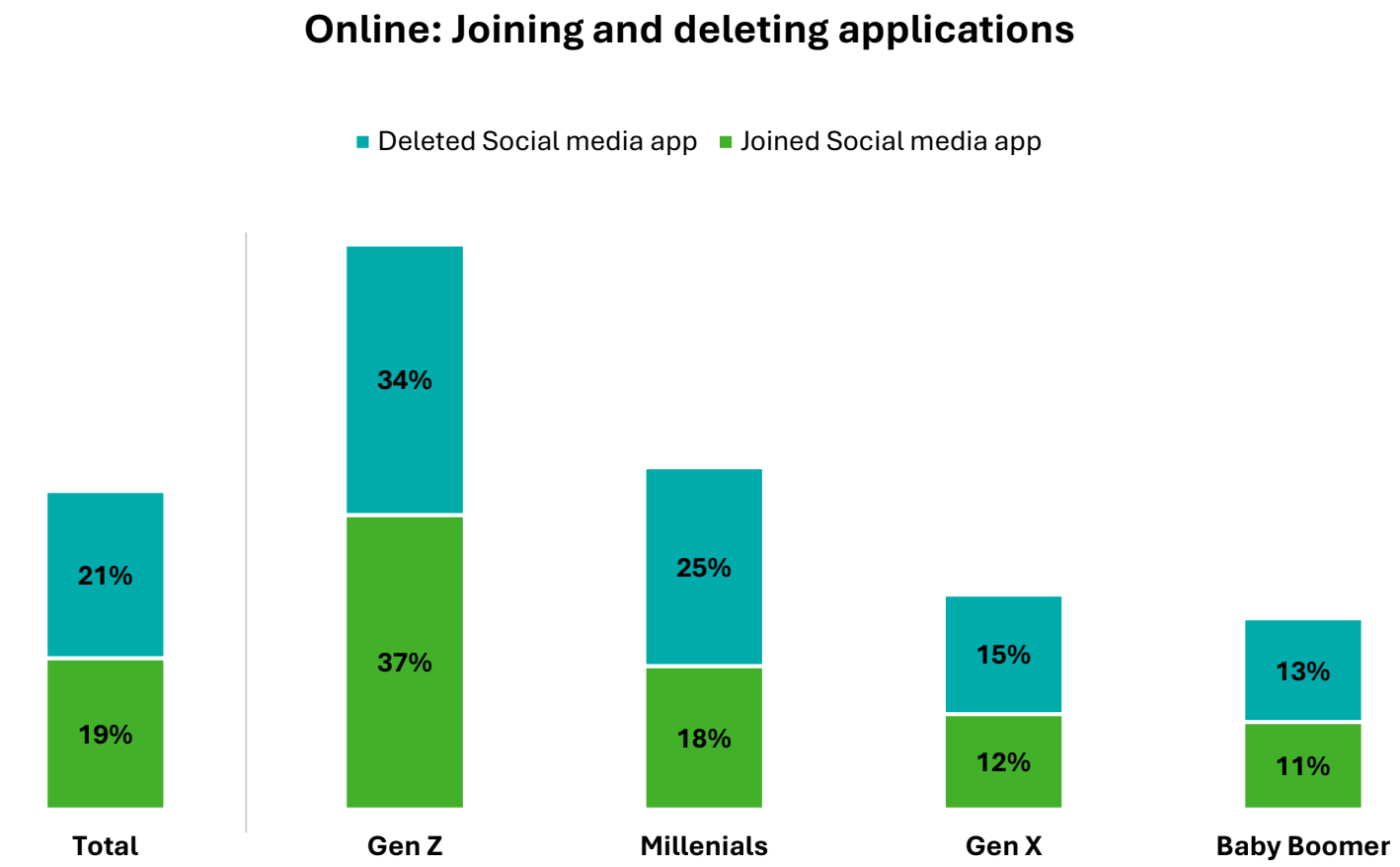
One in five individuals (21%) have deleted a social media app in the past 12 months



Question: In the last 12 months, have you joined any social media apps or deleted any existing ones from one or more of your devices?
Weighted base: All respondents aged 18-75 years, 2025 (2000)
Source: Deloitte Digital Consumer Trends, NL, 2025

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Gen Z consumers are the most likely to change their social media applications — 37% joined one and 34% deleted one in the past 12 months

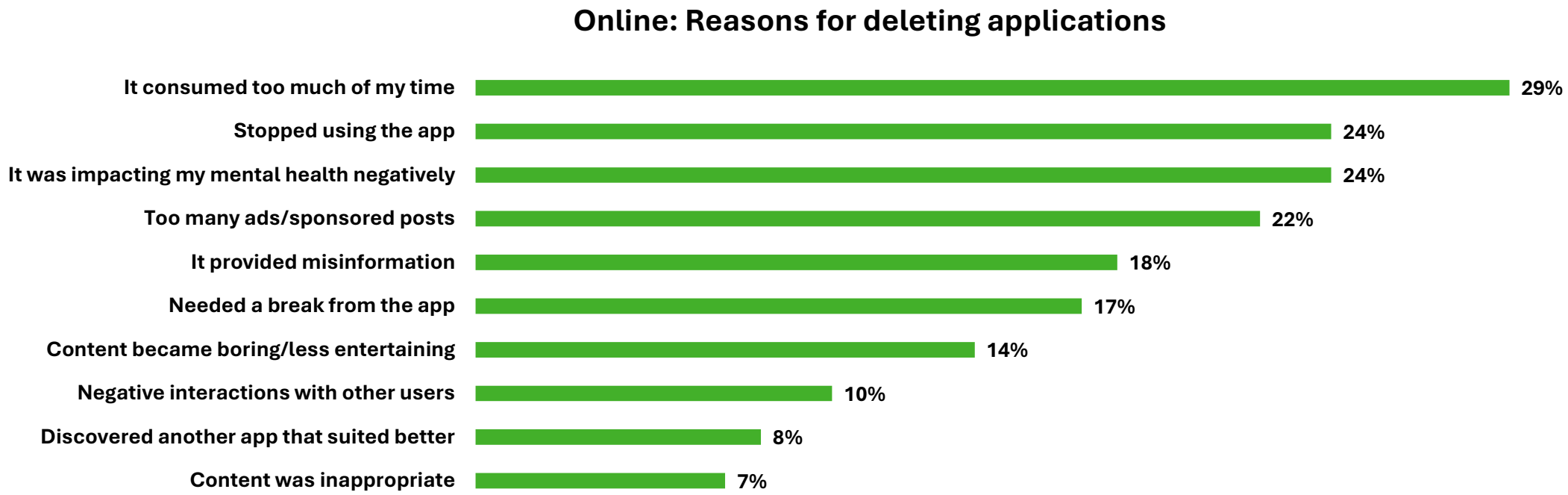


Question: In the last 12 months, have you joined any social media apps or deleted any existing ones from one or more of your devices?
Weighted base: All respondents aged 18-75 years, 2025 (2000)
Source: Deloitte Digital Consumer Trends, NL, 2025

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24% of Dutch consumers who uninstalled a social media app cited negative impacts on their mental health

Reasons for deleting social media vary per generation. Baby Boomers mostly delete apps due to advertisements (30%) or misinformation (26%), whereas Gen Z tends to remove social media apps because they take up too much time (28%), have stopped using the app (25%) or because of negative impact on their mental health (27%).



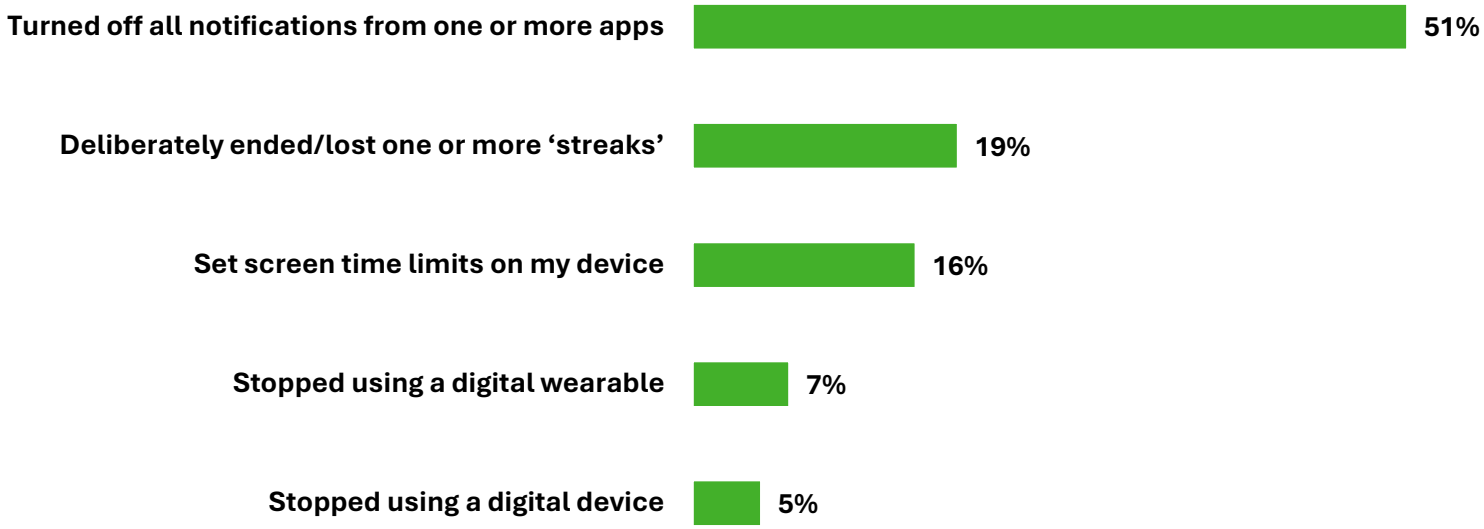
Question: You mentioned that you have deleted a social media app in the last 12 months. What prompted you to make this decision?
Weighted base: All respondents aged 18-75 years, 2025 (538); Respondents who have deleted a social media app
Source: Deloitte Digital Consumer Trends, NL, 2025

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Among consumers taking measures to de-digitize, over half (51%) of them turned off all notifications in the past year

Many have grown fatigued from digital exposure and have begun to change their digital habits with just over half of respondents (51%) reported turning off notifications in 2025, up from 30% in 2020.

Online: Measures to reduce digital exposure for de-digitization

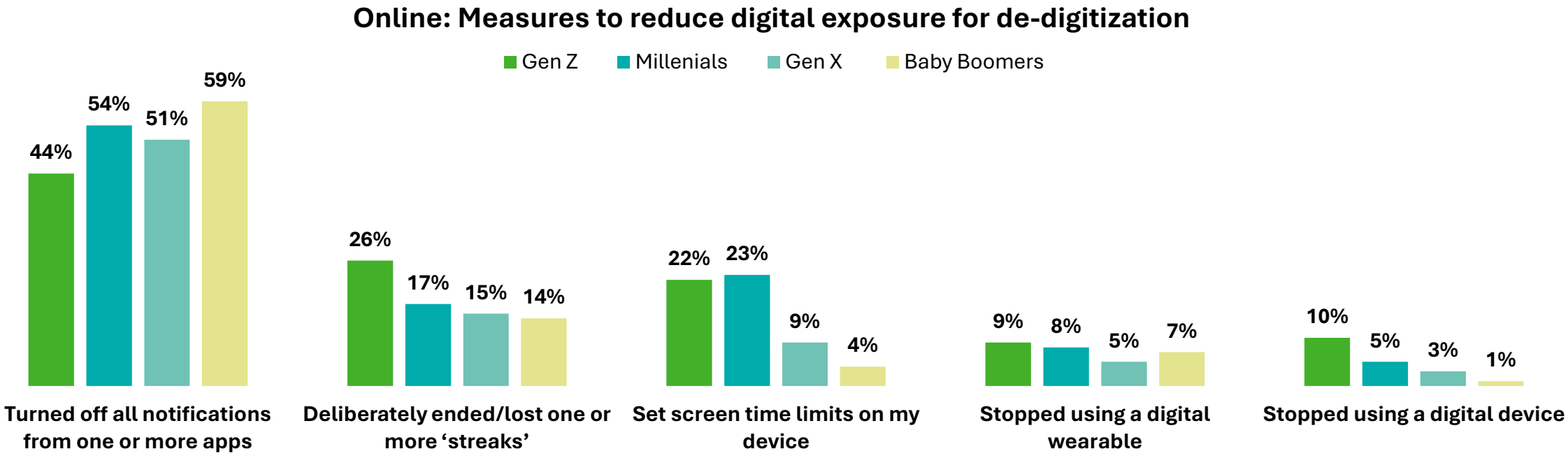


Question: And which, if any, of the following have you done within the last 12 months MAINLY to reduce the use of technology or digital devices?
Weighted base: All respondents aged 18-75 years, 2025 (1155); Respondents who have done any of these activities
Source: Deloitte Digital Consumer Trends, NL, 2025

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Among consumers taking measures to de-digitize, Gen Z leads in those efforts across most actions, whereas turning off notifications is dominated by Baby Boomers (59%)

Among consumers taking measures to de-digitize, Baby Boomers (59%) are more likely to turn off notifications to reduce the use of technology or digital devices, compared to 44% for Gen Z. While the opposite pattern can be observed for the other categories where younger generations are more likely to take de-digitization measures, such as setting screen time limits or to stop using a digital device altogether.

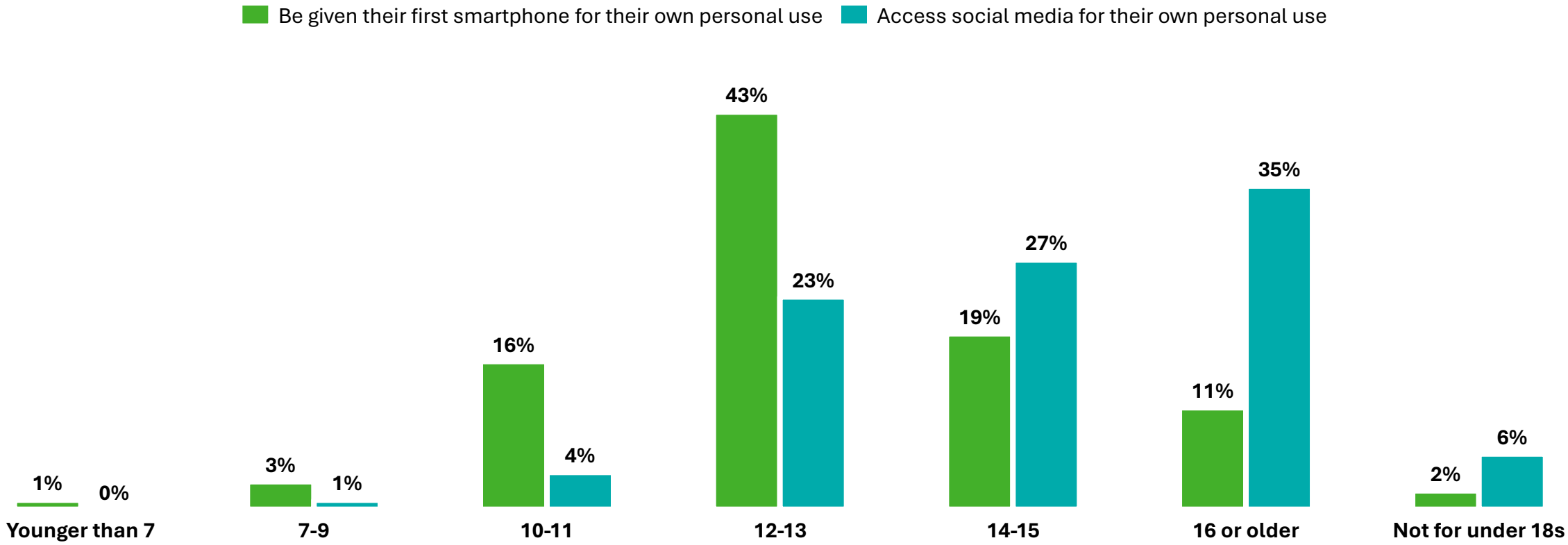


Question: And which, if any, of the following have you done within the last 12 months MAINLY to reduce the use of technology or digital devices?
Weighted base: All respondents aged 18-75 years, 2025 (1155); Respondents who have done any of these activities
Source: Deloitte Digital Consumer Trends, NL, 2025

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50% of consumers believe the appropriate age to access social media is 12-15 years old; smartphone use may be considered a safer option for children

Online: Acceptable age for smartphone and social media access

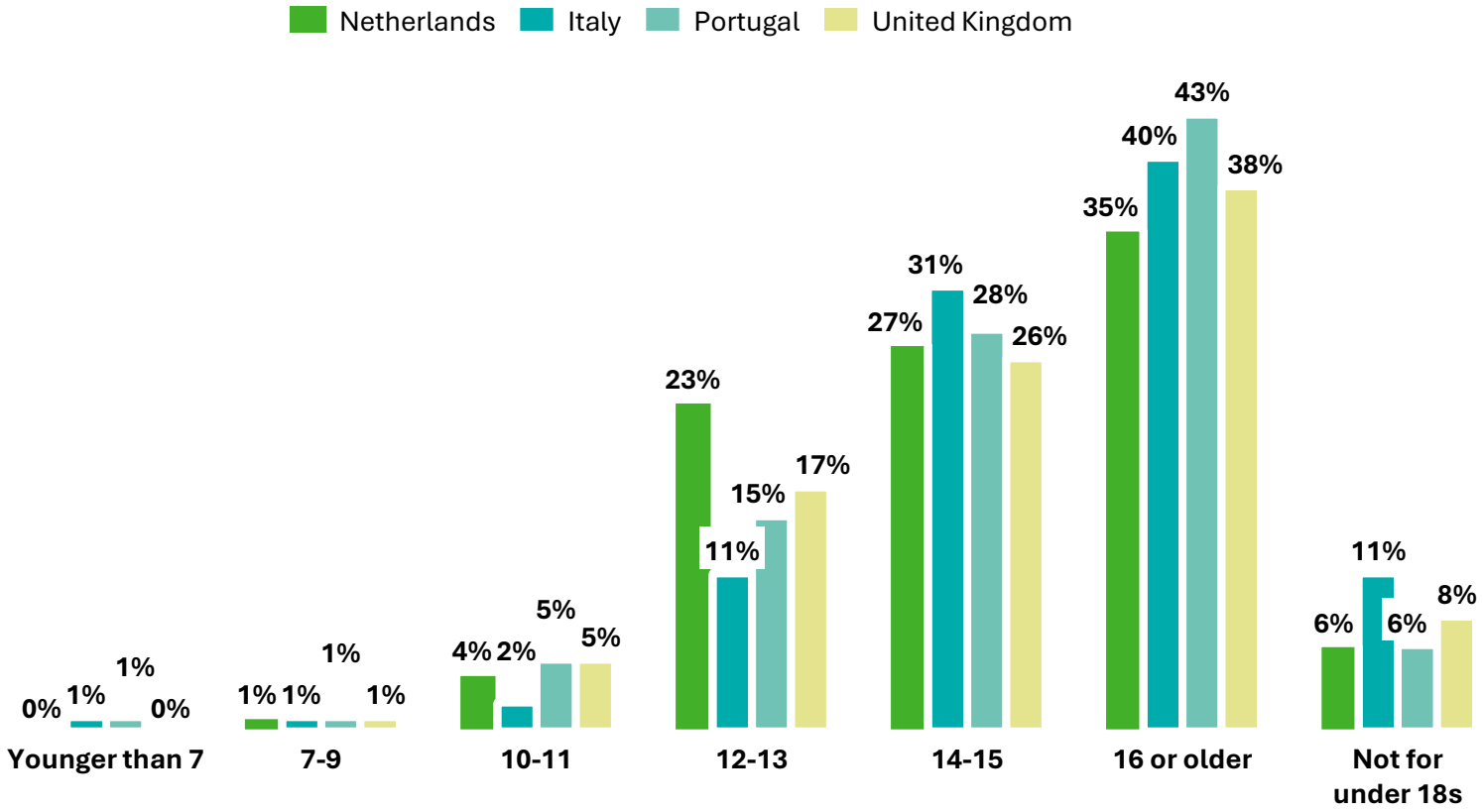


Question: At what age do you think it's acceptable for a child to be given their first smartphone for their own personal use?; At what age do you think it's acceptable for a child to access social media for their own personal use?
Weighted base: All respondents aged 18-70 years, 2025 (1944); Respondents who have a phone or smartphone
Source: Deloitte Digital Consumer Trends, NL, 2025

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Compared with other European consumers, Dutch consumers are more accepting of social media use by children

Online: Country comparison for acceptable age for social media access



Dutch consumers appear more comfortable with their children accessing social media at a younger age (23% for 12-13 years old, followed by 17% for UK).

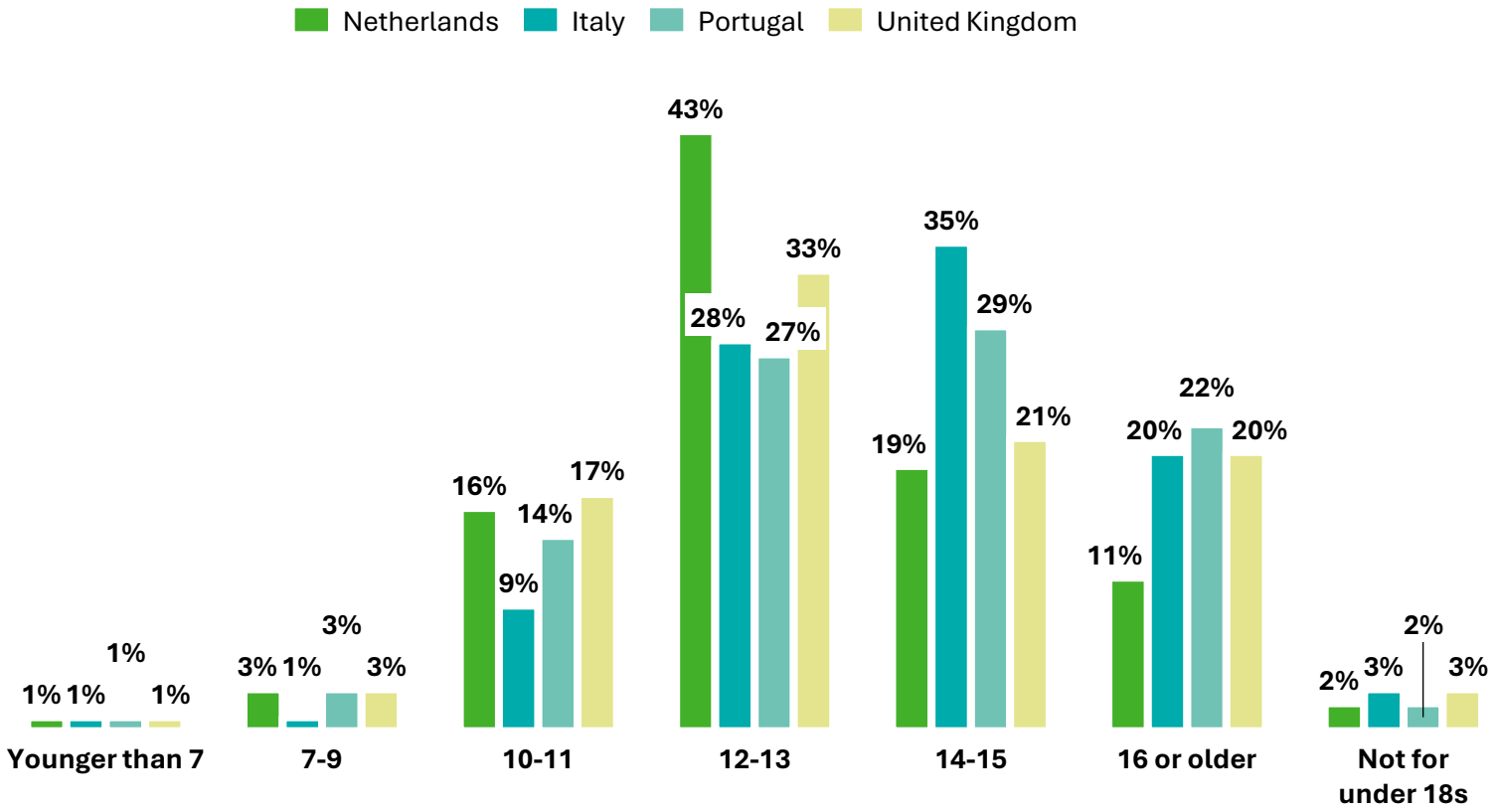
Portuguese consumers are most conservative, with 43% agreeing on a minimum age of 16 for accessing social media, against 35% for Dutch respondents.

Question: At what age do you think it's acceptable for a child to access social media for their own personal use?
Weighted base: All respondents aged 18-70 years, 2025 NL (1944); IT (1935); PT (970); UK (3879); Respondents who have a phone or smartphone
Source: Deloitte Digital Consumer Trends, NL, 2025; Deloitte Digital Consumer Trends, PT, 2025; Deloitte Digital Consumer Trends, IT, 2025; Deloitte Digital Consumer Trends, UK, 2025

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Compared with other European consumers, Dutch consumers are more open to children receiving their first smartphone at an earlier age

Online: Country comparison for acceptable age for smartphone access



Dutch consumers are more comfortable with the smartphone use of children than their European counterparts, with 43% agreeing on a minimum age of 12-13 years (followed by UK at 33%).

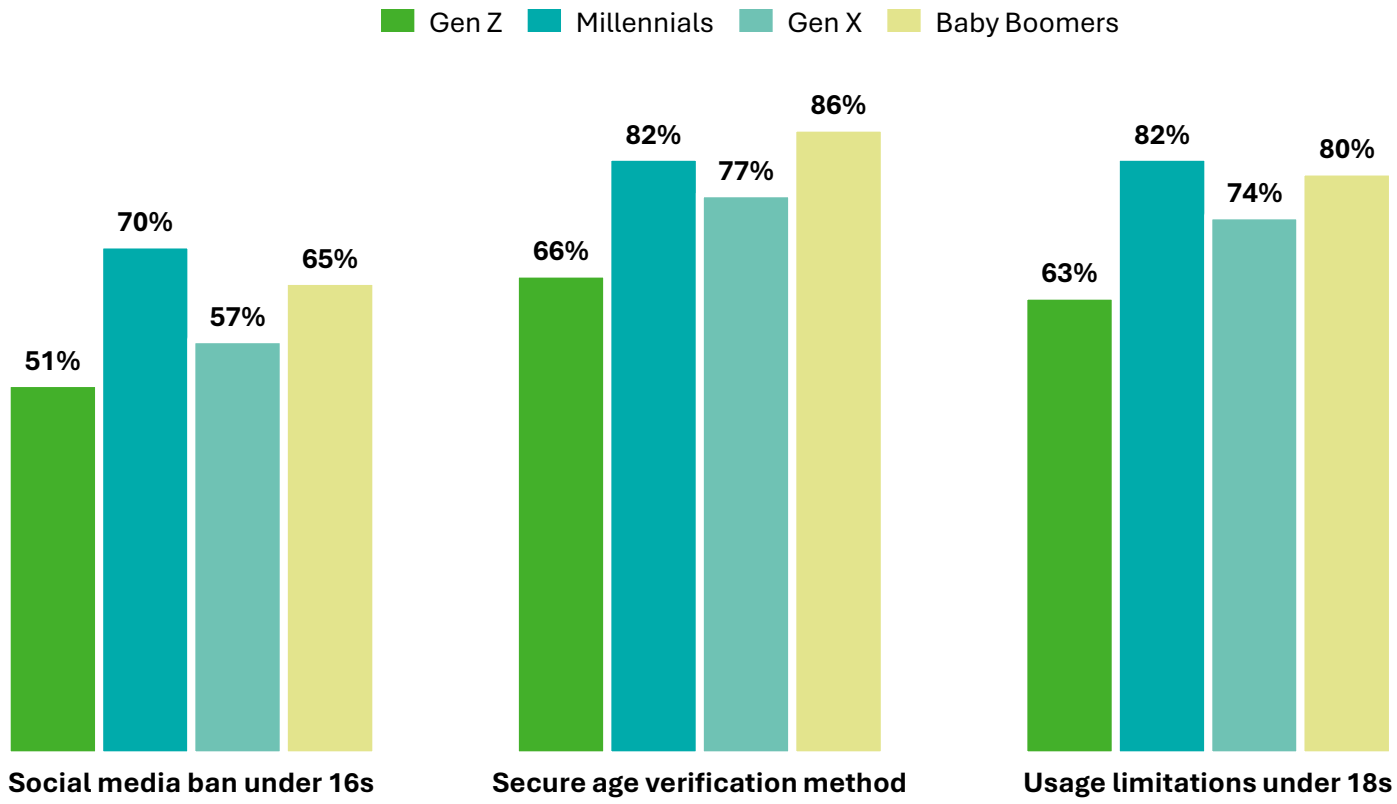
Italian (35%) and UK (29%) consumers favor a minimum age slightly older, at 14-15 years.

Question: At what age do you think it's acceptable for a child to be given a smartphone for their own personal use?
Weighted base: All respondents aged 18-70 years, 2025 NL (1944), IT (1935), PT (970), UK (3879); Respondents who have a phone or smartphone
Source: Deloitte Digital Consumer Trends, NL, 2025; Deloitte Digital Consumer Trends, PT, 2025; Deloitte Digital Consumer Trends, IT, 2025; Deloitte Digital Consumer Trends, UK, 2025

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Majority of consumers across all generations support stronger controls or limits on social media access

Online: In favor of social media restrictions for minors



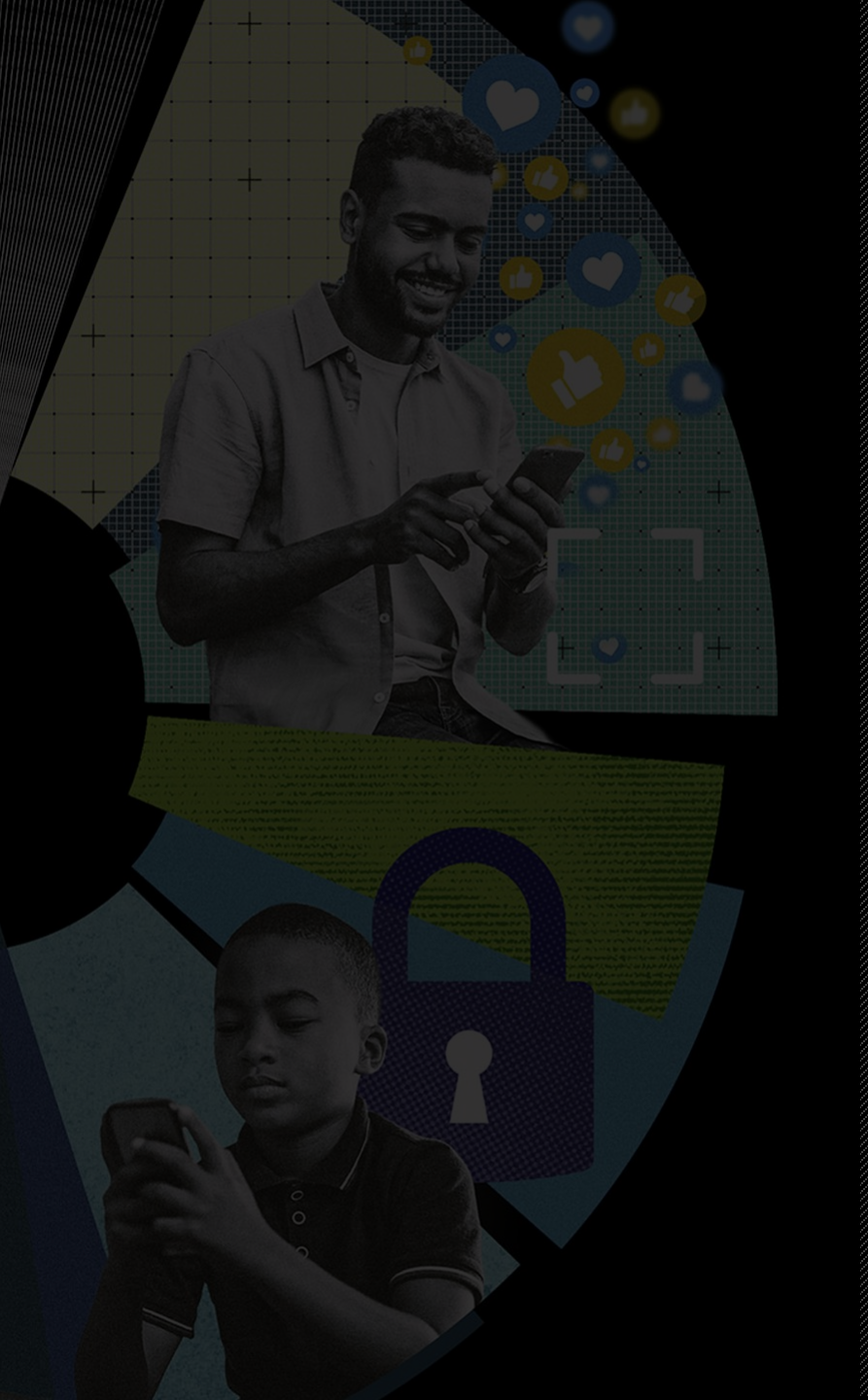
Overall, Dutch consumers support banning social media for individuals younger than 16, with on average 62% agreeing.

Secure age verification methods are the most popular social media restriction for children according to all four generations.

More than half of Gen Z (51%) agree with banning social media for children below 16 years old, a measure that would affect part of their generation. This would not directly affect these respondents, who are aged 18 to 29.

Question: To what extent would you favor the implementation of each of the following?
Weighted base: All respondents aged 18-70 years, 2025 (1944); Respondents who have a phone or smartphone
Source: Deloitte Digital Consumer Trends, NL, 2025

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Digital Consumer Trends, Dutch Edition

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