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Digital Consumer Trends
Dutch edition | key insights preview

Understanding Dutch consumer behaviour across digital products and services

About Deloitte’s
Digital Consumer Trends

Comprehensive study of Dutch digital consumer behaviour
The Dutch edition of the Digital Consumer Trends is a multi-country study examines how individuals engage with and purchase digital products across devices, connectivity, media, and emerging technologies.

The Digital Consumer Trends 2025 (NL Edition) is conducted by Deloitte’s Technology, Media and Telecommunications (TMT) practice.

Methodology: survey of Dutch 2,000 consumers aged 18-75y an independent research agency. Data weighted for demographics including age, gender, region, and working status.

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Five research areas

Generative AI | Key insights

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%

Devices | Key insights

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.
- Consumers are upgrading their smartphones regularly, with 48% acquiring their current smartphone within the past 18 months (compared to 46% in 2024).
- A total of 9% of respondents stopped using a device, which compares to 22% of the Gen Z respondents who reported doing so.

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

Network | Key insights

Executive Summary

- More than one-third of Dutch consumers are unsure of their broadband speed suggesting that factors other than raw speed also influences their experience.
- 5G network accessibility rose sharply in 2025. 73% of respondents reported having access to 5G network, up from 59% in 2024.
- 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%.

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

Subscriptions | Key insights

Executive Summary

- 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.
- 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.

Strategic Implications

- Media companies can address the rotational churn across subscription services, especially among younger generations – through partnerships/bundling with other media companies and telcos to increase value and usage thereby combating the most cited reasons for cancellations. The opportunity is significant, as currently only 17% access a service through another service provider (vs. 76% directly)

Video streaming access
(among all consumers)

73%

▲ 4% since 2024

Pay 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

Music streaming access
(among all consumers)

52%

▲ 4% since 2024

Online | Key insights

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%

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