

Global Mobile Consumer Survey 2019

The Netherlands

Global Mobile Consumer Survey 2019

Welcome to the Dutch edition of the 2019 Global Mobile Consumer Survey, Deloitte's annual study into global mobile consumer trends. This "Dutch Cut" outlines the details around device ownership, connectivity, operator stores, mobile payments, smartphone usage, mobile gaming and privacy.

Deloitte has been researching mobile consumer behavior on a global scale for many years now, focusing on the key aspects of devices, connectivity and usage. Our research provides not only the most important insights into the state of the market, but it also reveals the most insightful developments.

So did Dutch consumers shift their priorities in this year's Dutch Edition? Do they still focus mostly on price and discounts when they choose a provider, or do other factors come into play?

Smartphone penetration in The Netherlands is still rising, with ownership reaching 93%. The Dutch also like to keep it fresh: the majority of smartphones were purchased in the last 18 months. But what about connected devices, can the Dutch keep up with other countries in term of adoption?

SIM-only and post paid subscriptions including phone have once again grown at the expense of pre-paid packages, which now only 1 out of 10 people have. But how has the attitude towards 5G been impacted in the last year? Are

people actually willing to pay more for 5G and if so, how much?

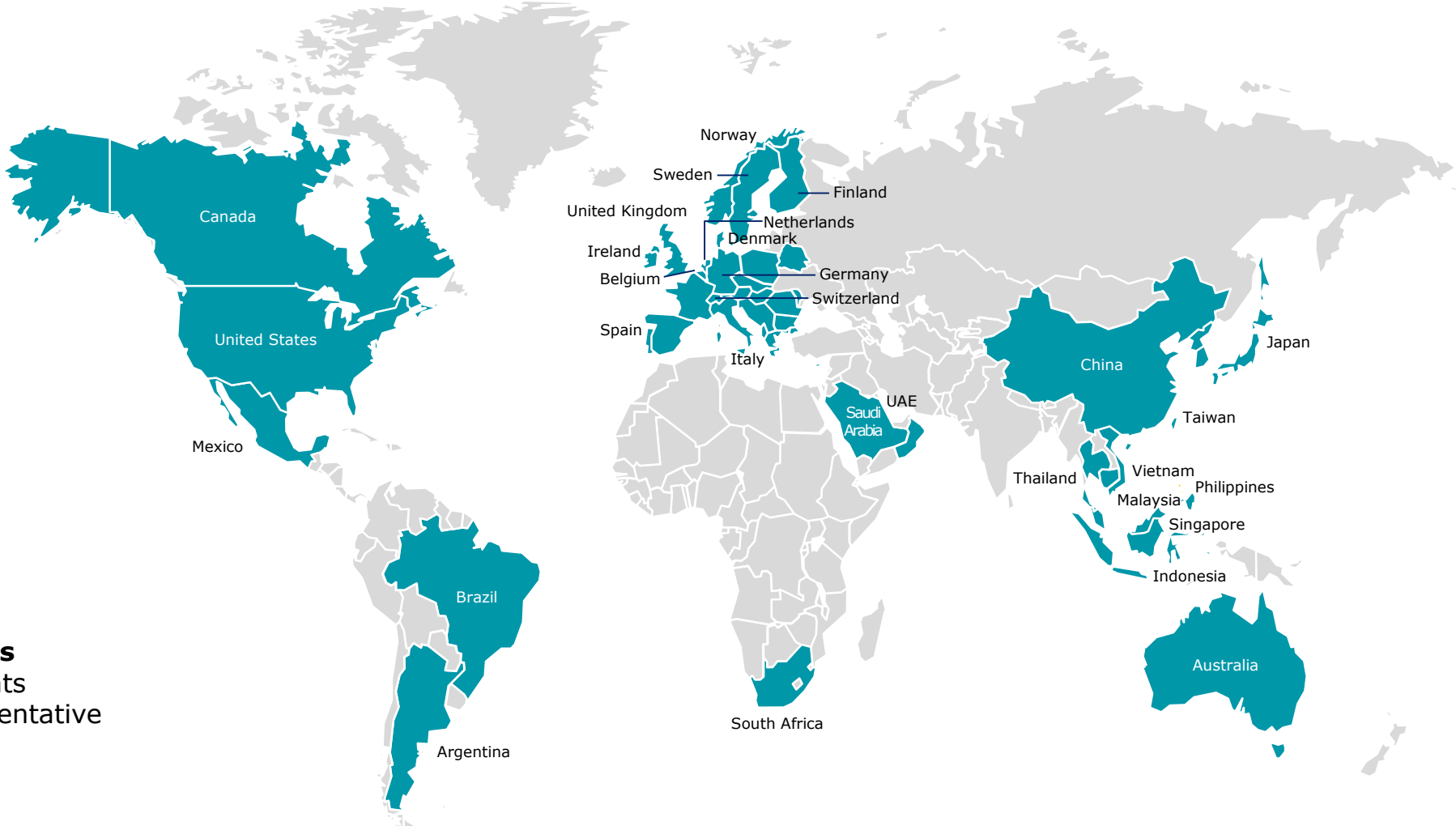
Smartphone addiction has been increasing over the last years and this trends continues in 2019. However, the use of mobile phones in traffic is a true problem that has been recognized by Dutch legislators in 2019. Has this new legislation that prohibits the use of mobile phones while cycling impacted consumer behavior?

More than half of Dutch smartphone owners play games on their device. Is there a difference in gender and age groups in terms of gaming activities? Which games are preferred by women, or older people?

The answers to these questions, and more, are included in this survey. We hope this study gives you the insight and data to enhance your understanding of the opportunities and challenges ahead, and as always we welcome your feedback.

Global Mobile Consumer Survey 2019

6 continents, 28 countries, 44.150 respondents



The Netherlands
2,000 Respondents
Nationally representative
Adults 18-75
Online polling

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Devices

Connected device ownership grows further. Nowadays,

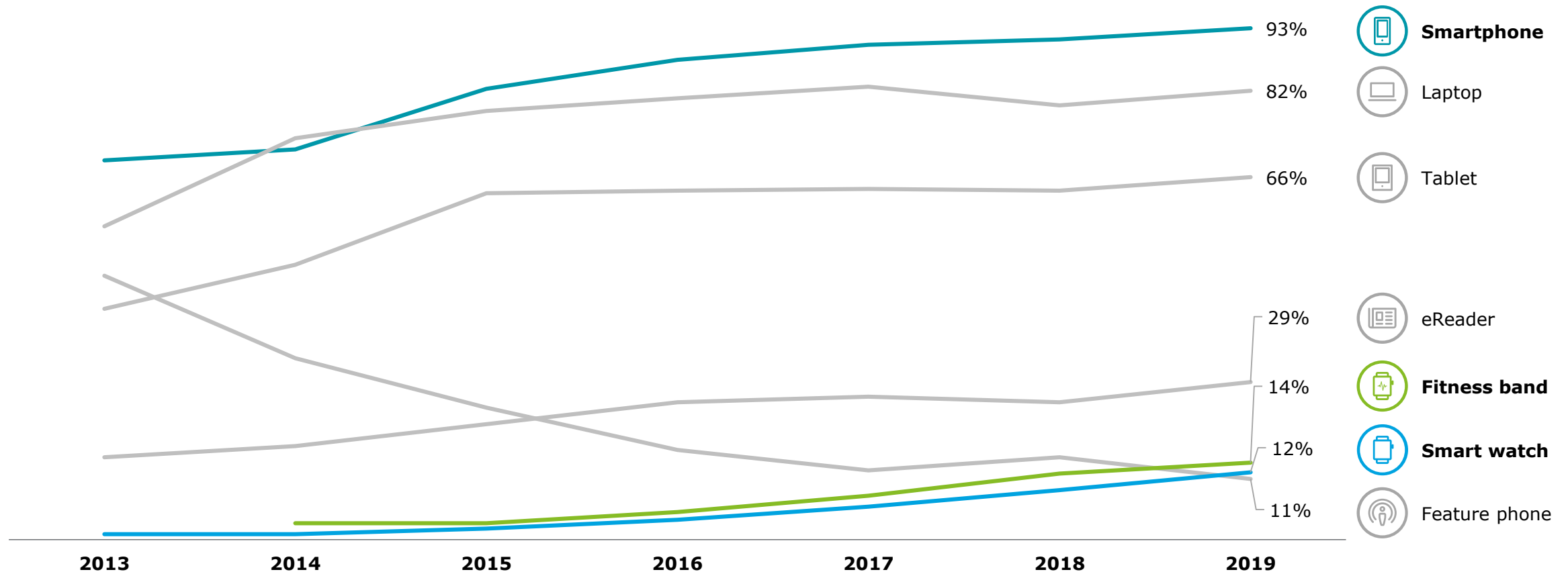
77%

of Dutch population owns at least one connected device.



Smart watch and fitness band adoption takes over feature phone, while smartphone penetration has reached 93%

Which, if any, of the following devices do you own or have ready access to?

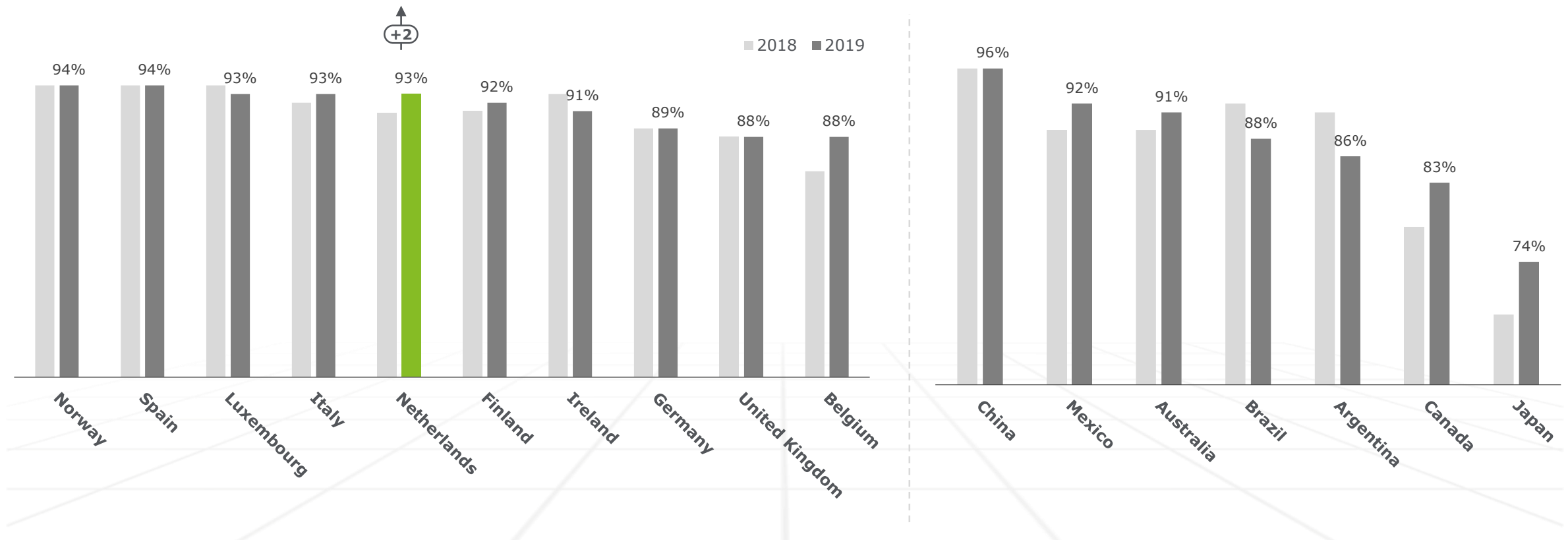


Source: Deloitte Global Mobile Consumer Survey 2013 – 2019, NL edition

Weighted Base: All respondents (2019: n=2000)

The Netherlands shows a growth of 2% in smartphone adoption and is catching up in Europe

Do you own or have ready access to a smartphone?

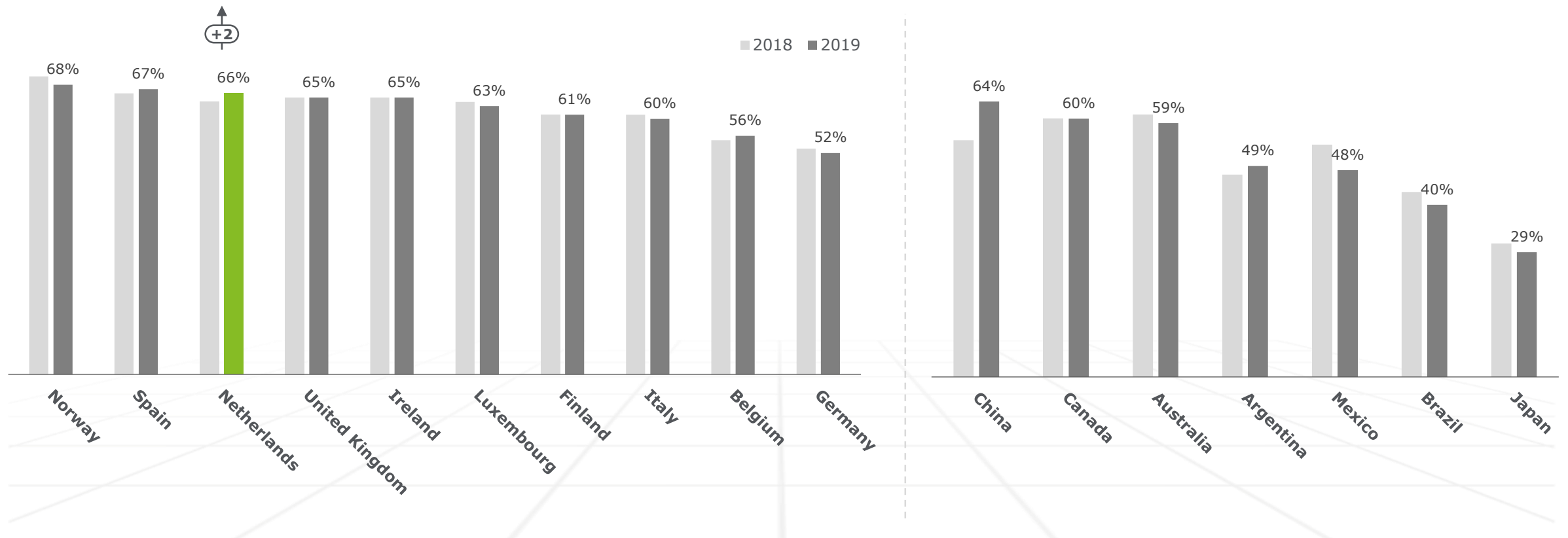


Source: Deloitte Global Mobile Consumer Survey 2018 and 2019, NL edition and global data aggregation

Weighted Base: All respondents (2019: n=2000)

The Netherlands is one of the three EU countries that shows a growth in tablet adoption and is now ranked third in Europe

Do you own or have ready access to a smartphone?

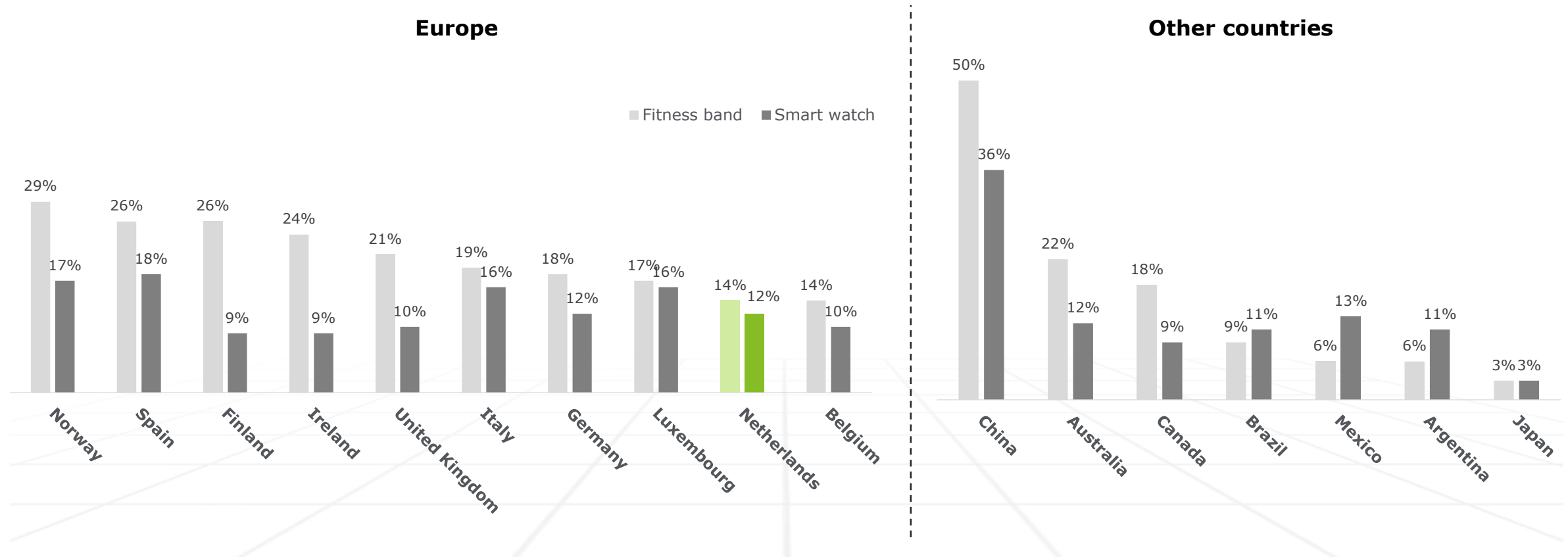


Source: Deloitte Global Mobile Consumer Survey 2018 and 2019, NL edition and global data aggregation

Weighted Base: All respondents (2019: n=2000)

Compared to other surveyed European countries, the Netherlands is especially behind in fitness band adoption

Do you own or have ready access to a smartphone?

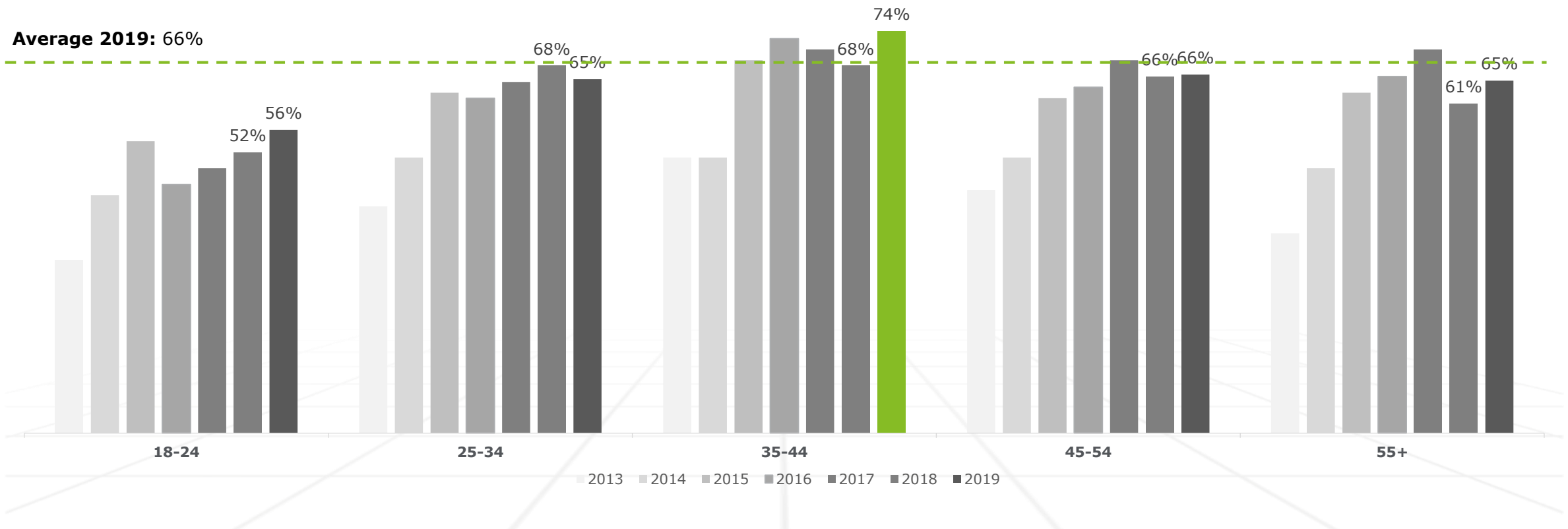


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition and global data aggregation

Weighted Base: All respondents (2019: n=2000)

The increase in tablet adoption can be mostly attributed to the 35-44 age group

Do you own or have ready access to a tablet?

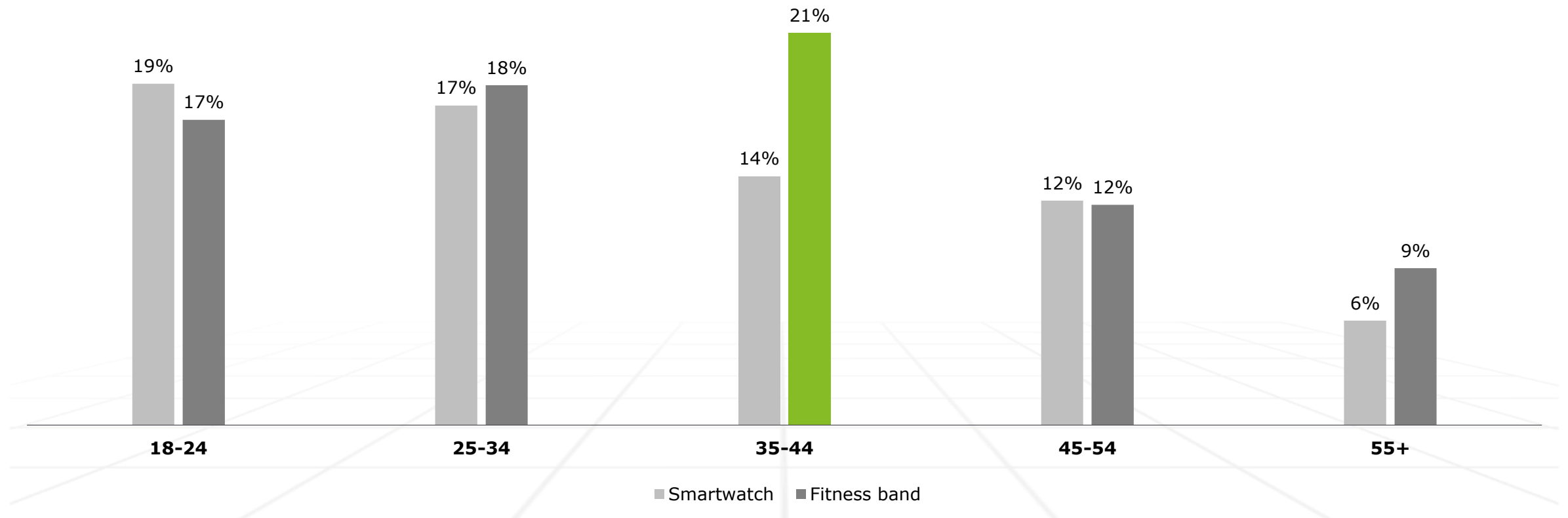


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents (2019: n=2000)

Fitness band is mostly adopted by people in the age range 25-44, while the smartwatch is more popular among youngsters

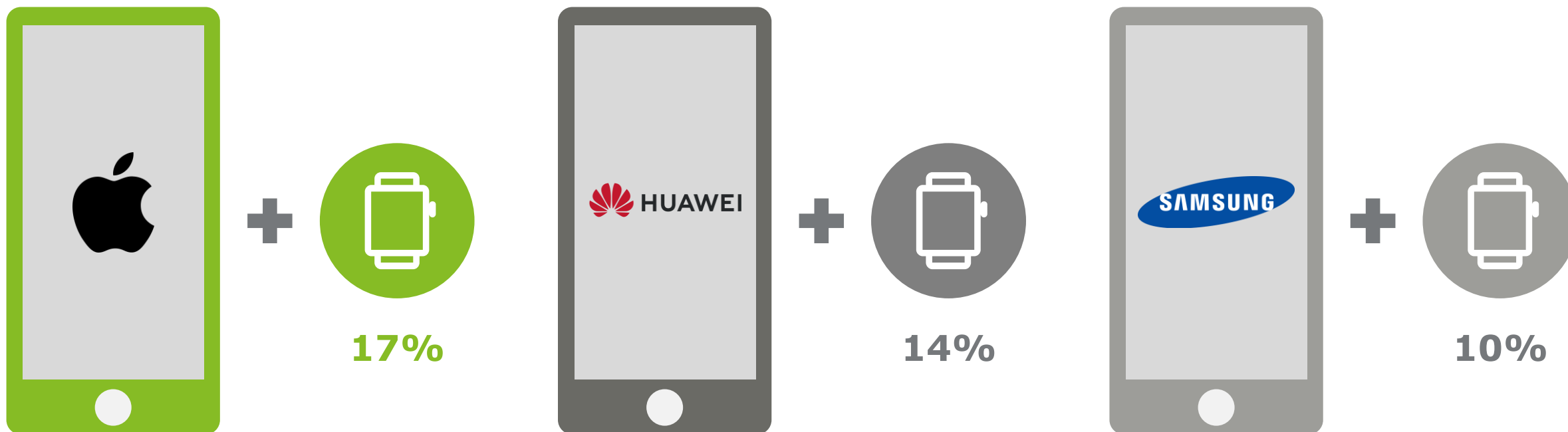
Do you own or have ready access to a smartwatch or fitness band?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents (2019 NL Edition: n=2000)

17% of Apple smartphone owners has a smartwatch, while smartwatch adoption is lowest for Samsung smartphone owners

Do you own or have ready access to a smartwatch?

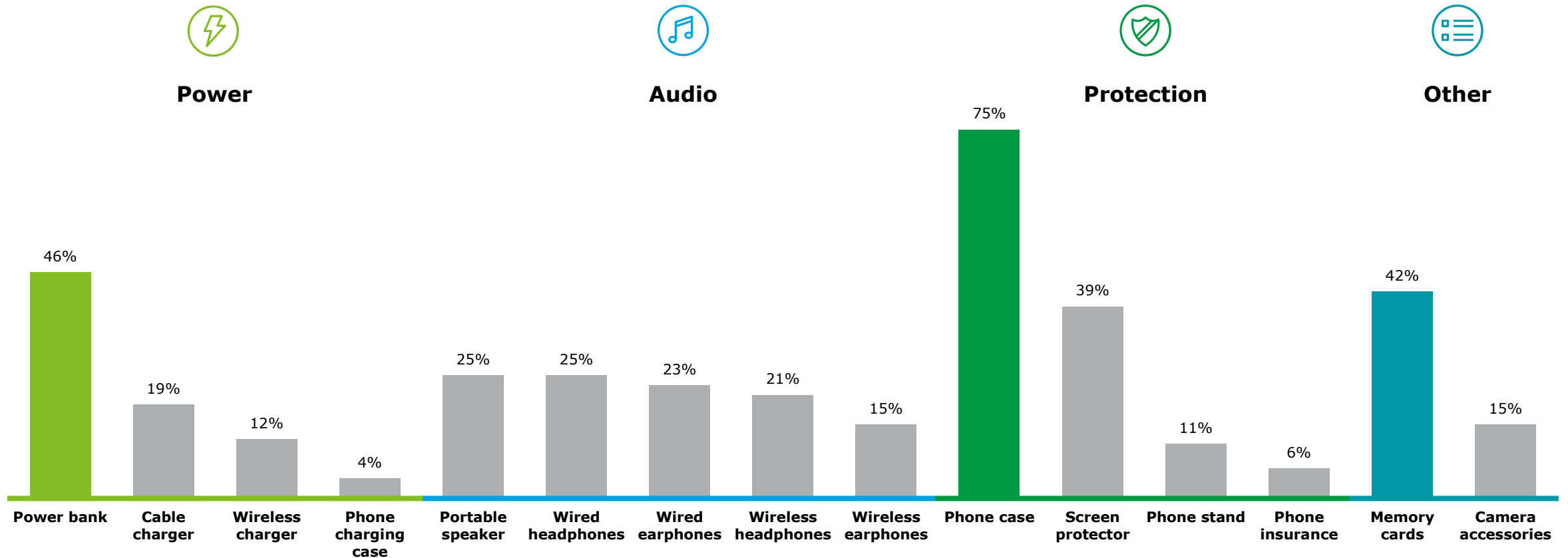


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a smartphone of the brands Apple, Samsung and Huawei (2019 NL Edition: n=1514)

A phone case, power bank and memory card are accessories usually purchased separately

Which of these accessories/services for your phone did you purchase separately?

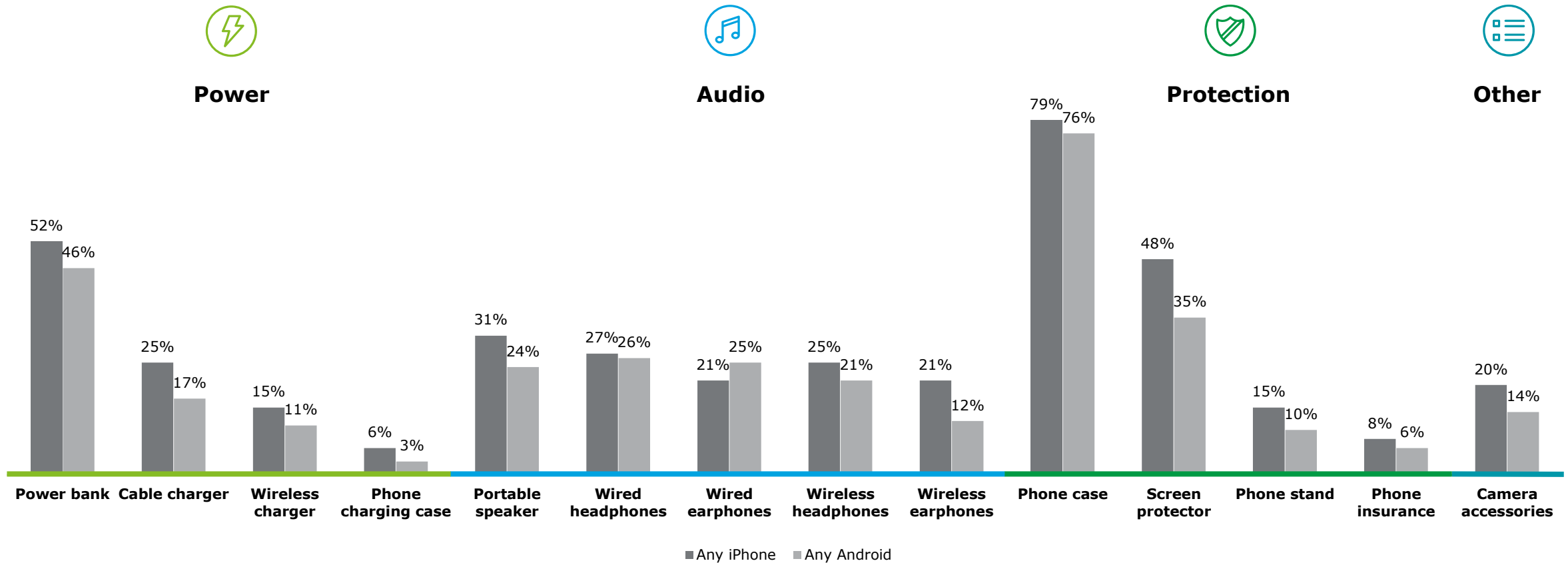


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

In general, iPhone users purchase more accessories/services separately, except for wired earphones

Which of these accessories/services for your phone did you purchase separately?

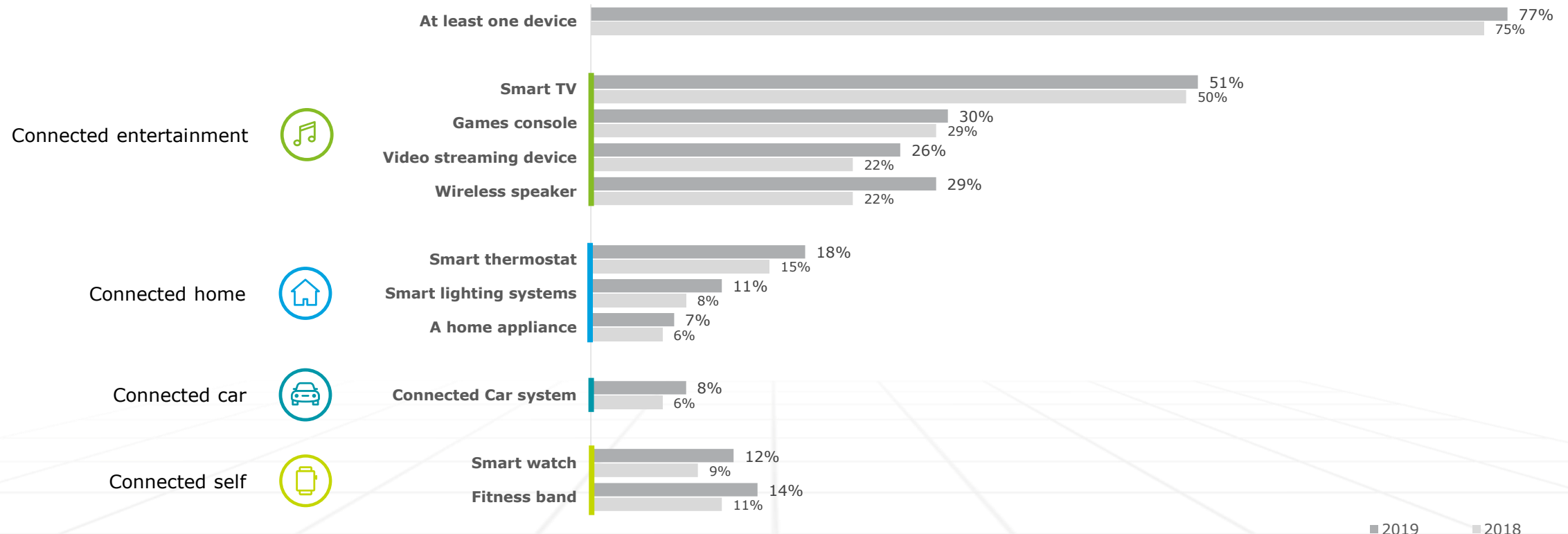


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

Connected device ownership grows to 77%, driven by growth across all connected device categories

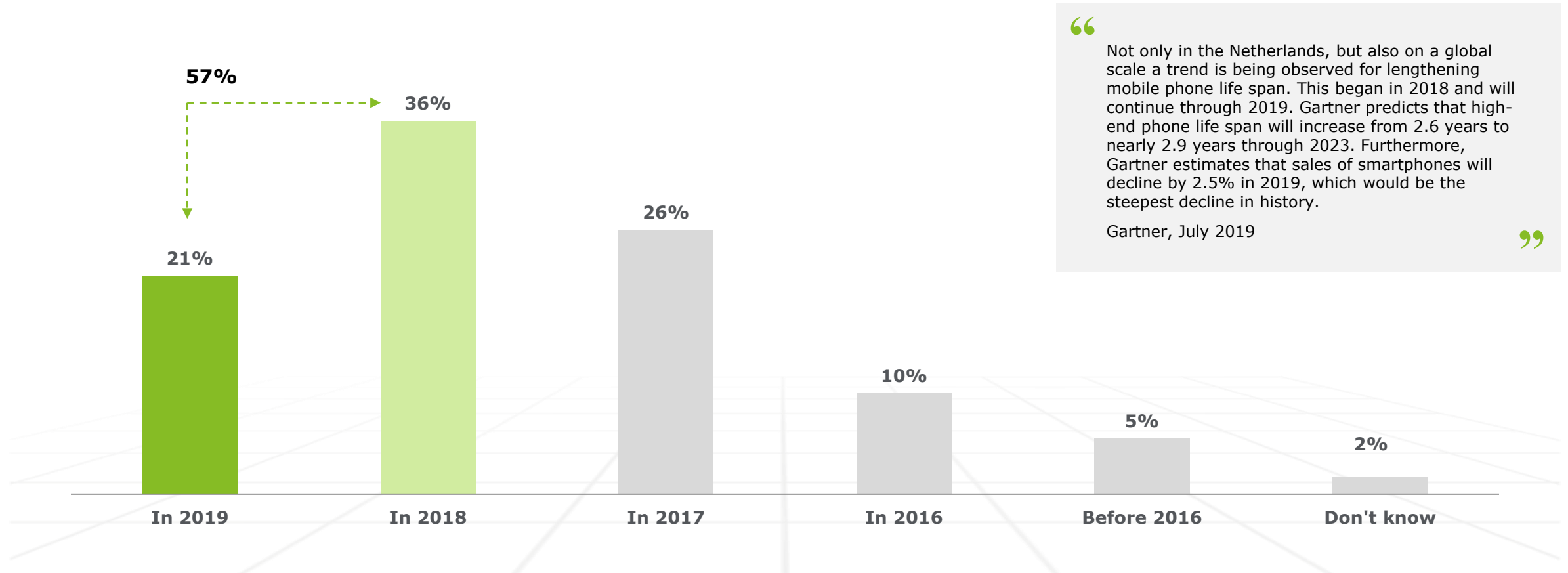
Which of the following connected devices do you own or have access to?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents (2019 NL Edition: n=2000)

57% of smartphones were purchased within the last 18 months, which is a decrease of 2%-points compared to last year's figures

When did you buy or receive your current smartphone?



“

Not only in the Netherlands, but also on a global scale a trend is being observed for lengthening mobile phone life span. This began in 2018 and will continue through 2019. Gartner predicts that high-end phone life span will increase from 2.6 years to nearly 2.9 years through 2023. Furthermore, Gartner estimates that sales of smartphones will decline by 2.5% in 2019, which would be the steepest decline in history.

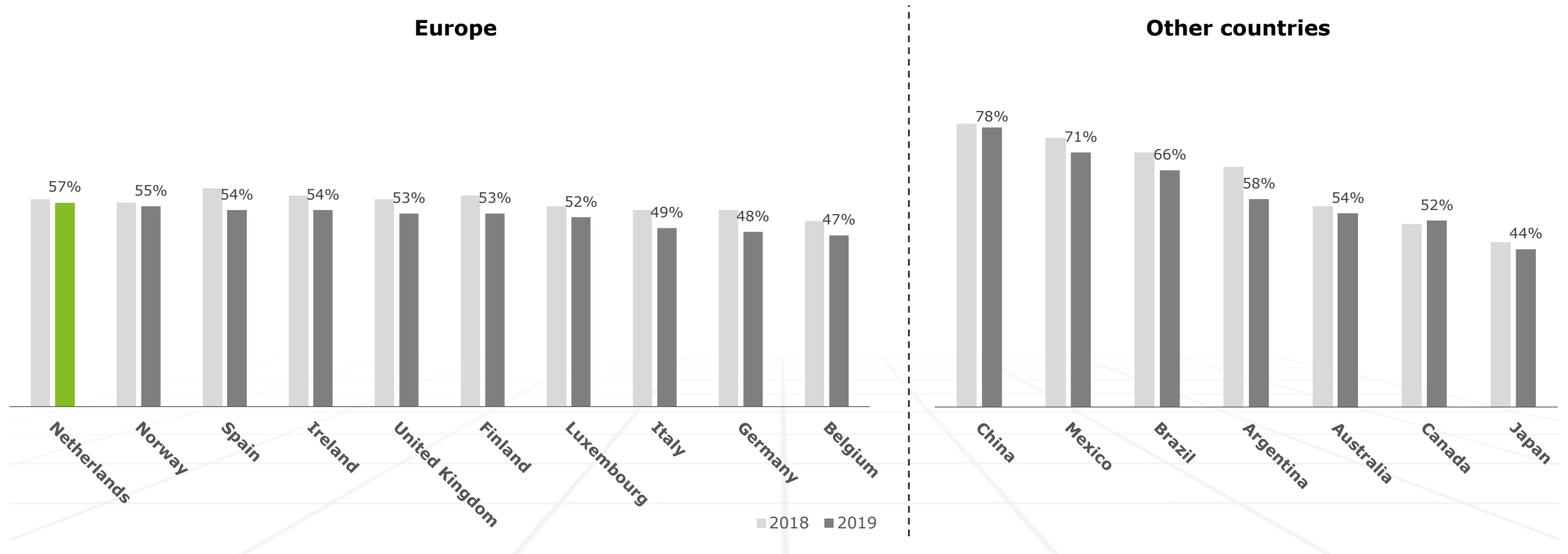
Gartner, July 2019

”

Source: Deloitte Global Mobile Consumer Survey 2019, NL edition and global data aggregation
Weighted Base: All respondents owning a smartphone (NL edition: n=1860)

In Europe, NL shows the highest percentage of people with smartphones bought or received in the last 18 months

When did you buy or receive your current smartphone? In the last 18 months

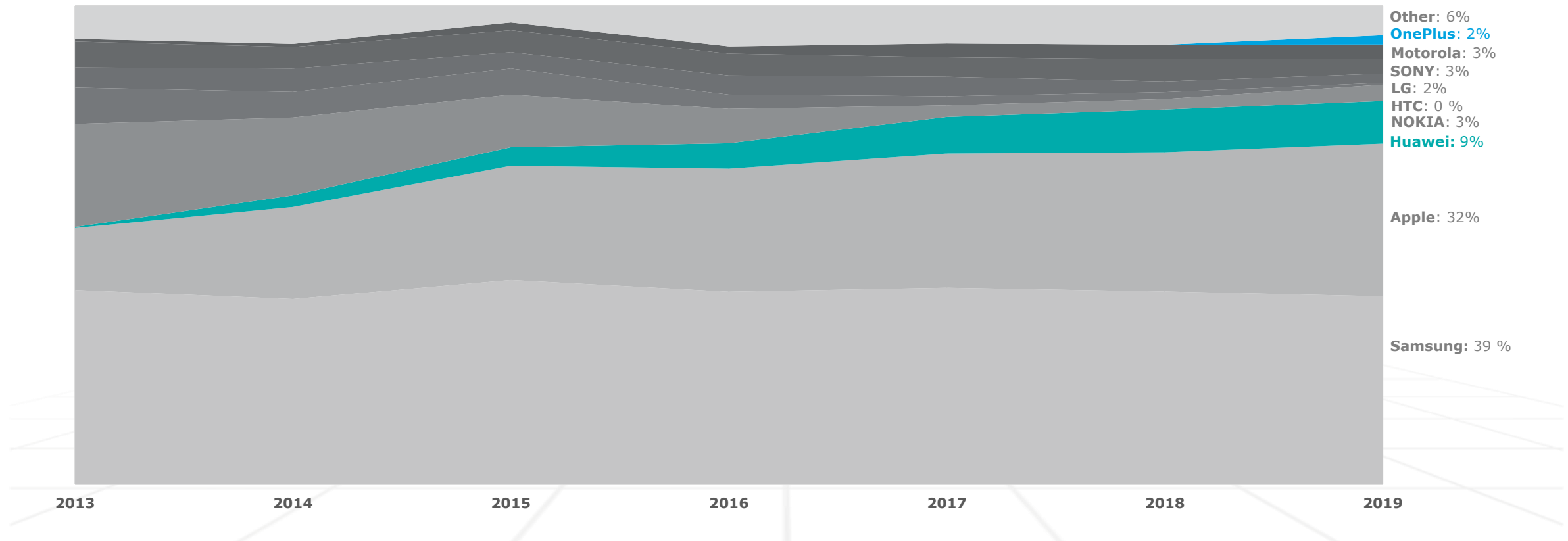


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition and global data aggregation

Weighted Base: All respondents owning a smartphone (NL edition: n=1860)

Huawei growth stagnated for the first time since 2013, while OnePlus captures 2% of the installed base in the Netherlands

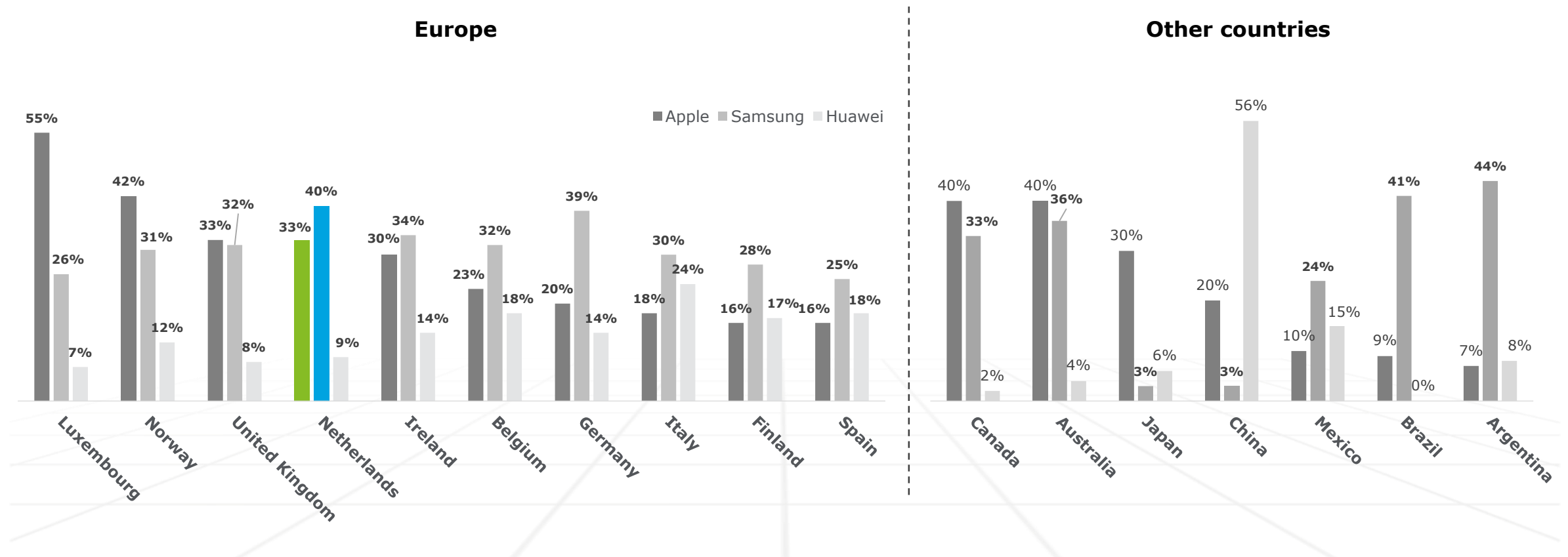
Thinking about your main phone, what is the brand and model of your current handset?



Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

The Netherlands has a higher adoption of Samsung compared to Apple brand phones, Europe shows variety in brand adoption

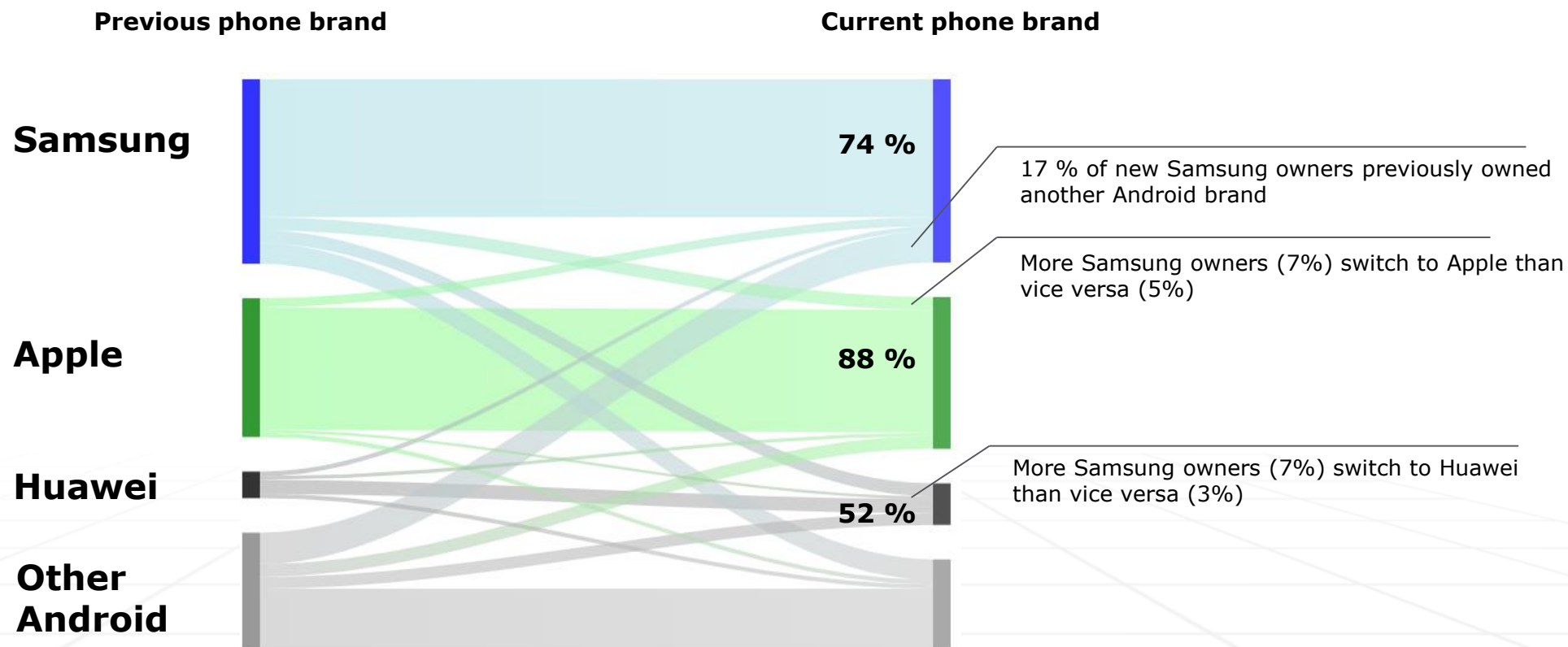
Thinking about your main phone, what is the brand and model of your current handset?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition and global data aggregation
 Weighted Base: All respondents owning a smartphone of the brands Apple, Samsung and Huawei (2019 NL Edition: n=1514)

88% of Apple phone owners previously owned an Apple brand phone, and seem to be most loyal to the brand

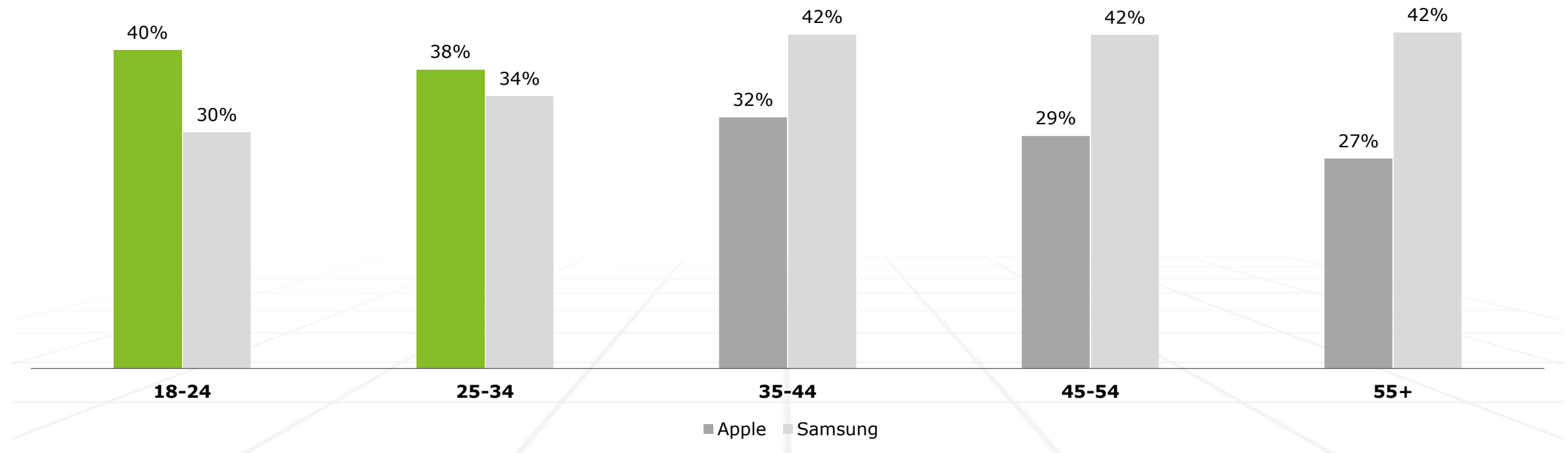
Thinking about your main phone, what is the brand and model of your current handset?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents owning a smartphone (NL edition: n=1860)

Apple is most popular among 18-34 year olds, Samsung has higher adoption among the 35+ age groups

Thinking about your main phone, what is the brand and model of your current handset?

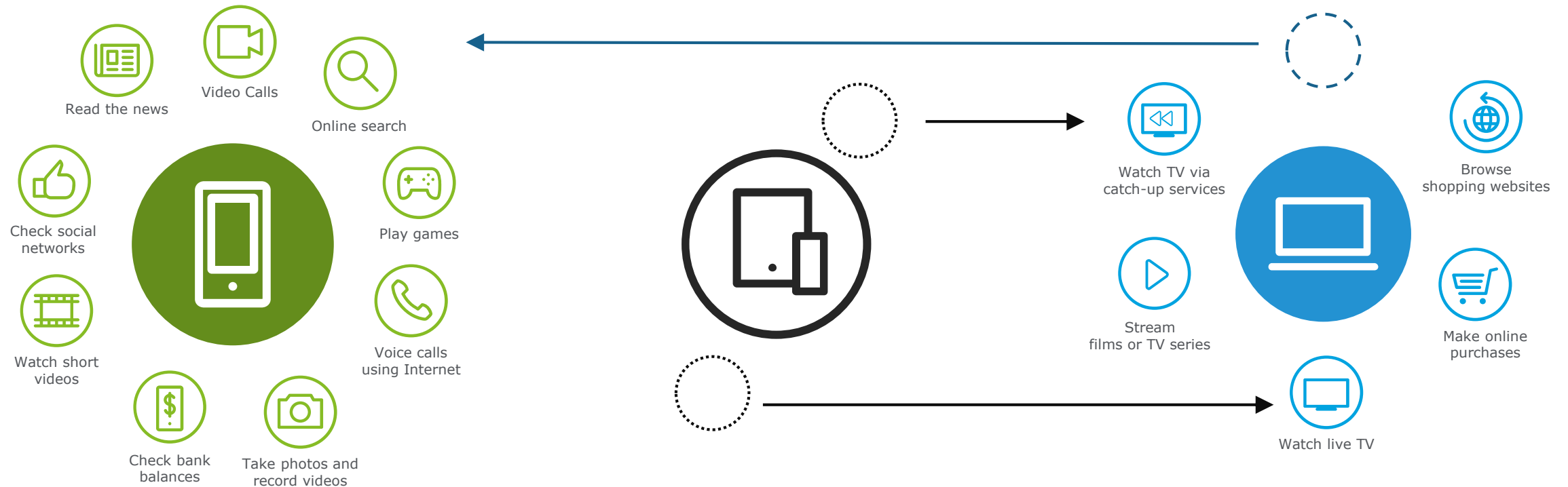


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a smartphone (NL edition: n=1860)

Laptop has become the preferred device for the two remaining activities previously preferred to be performed on a tablet

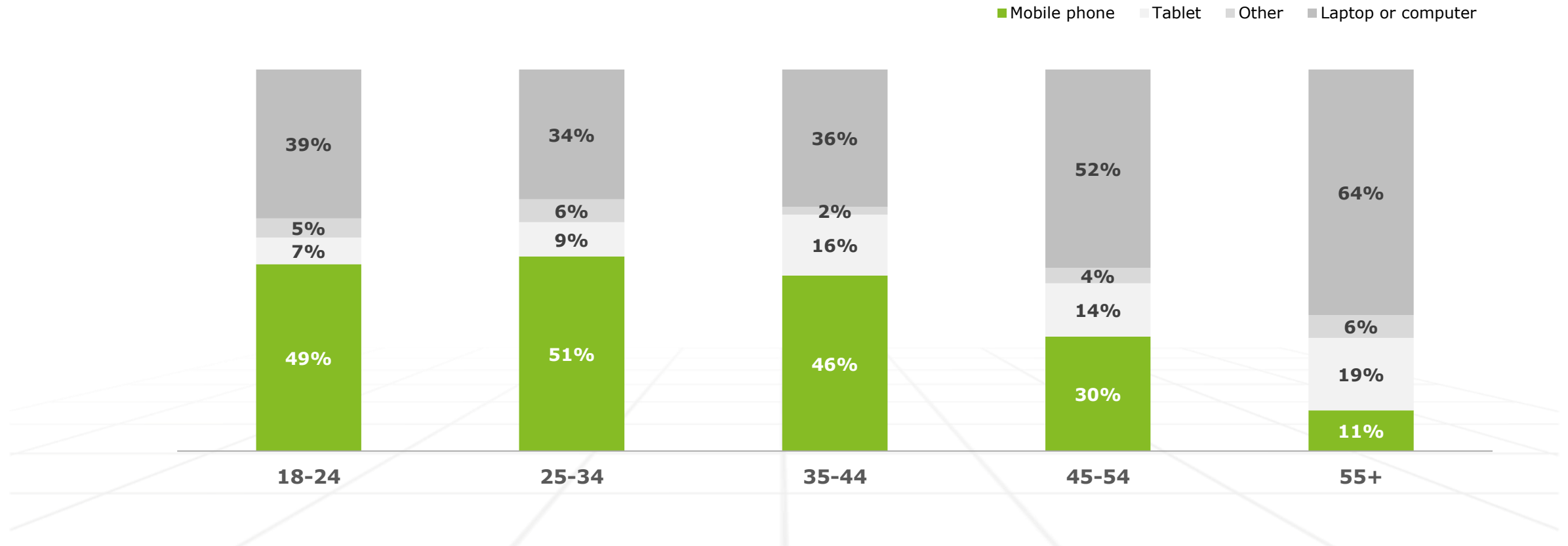
Which, if any, is your preferred device for each of the following activities?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents who have a smartphone, tablet or laptop (n=1934)

Mobile phone is the preferred device for younger age groups for online search, older age group prefer to use a laptop or PC

Which, if any, is your preferred device for each of the following activities? - Online search



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents who have a smartphone, tablet or laptop (n=1934)

Connectivity

60%

of youngsters in the age of 18-24 are willing to pay more for 5G.

17% of this age group is willing to pay more than € 10 per month.

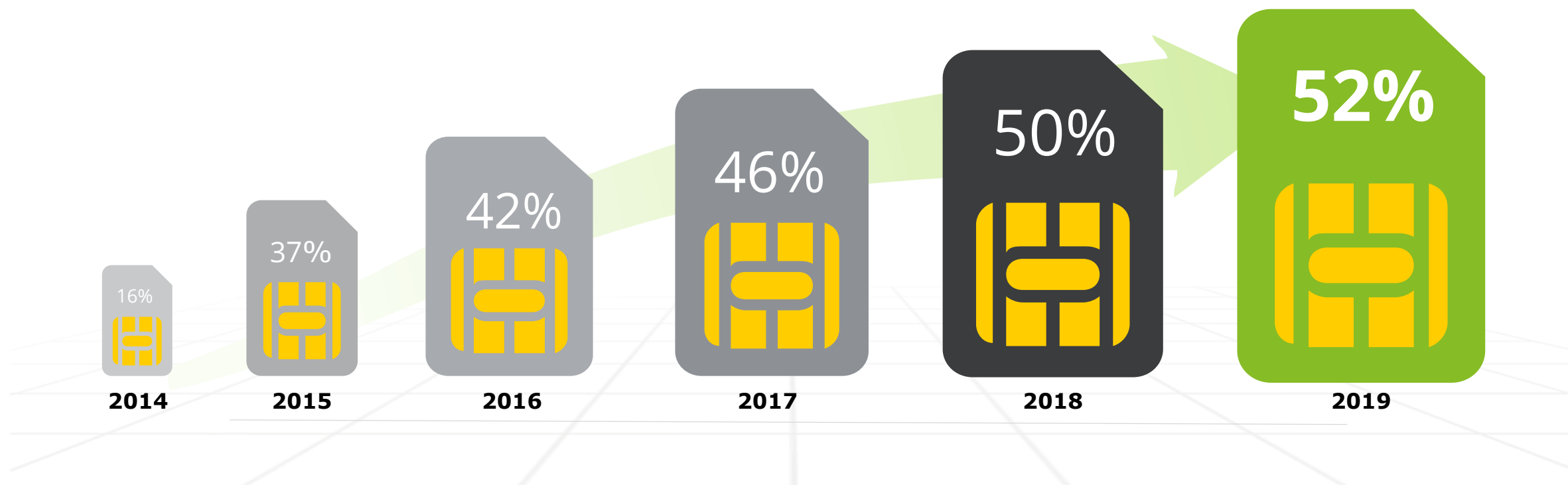
5G



Pay with Touch ID

Sim-only penetration follows trend and reaches 52%

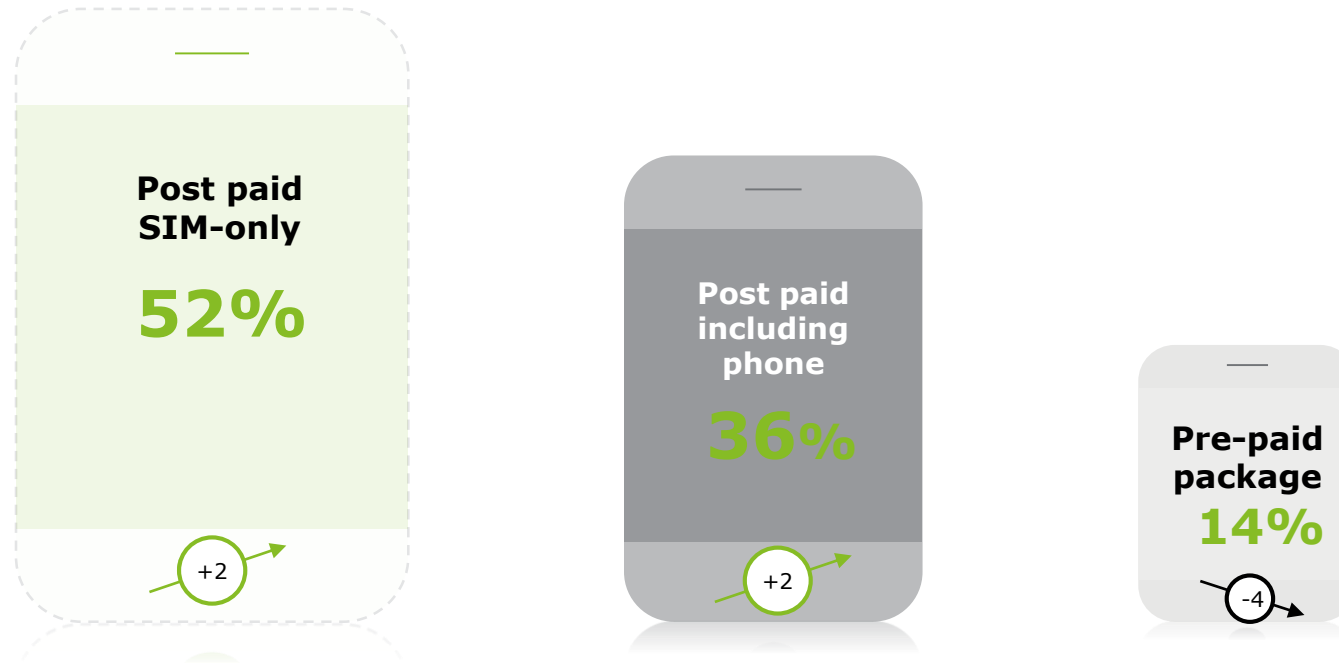
Percentage of sim-only post-pay phone users



Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

Pre-paid base has declined by 4%-points and reaches 10%

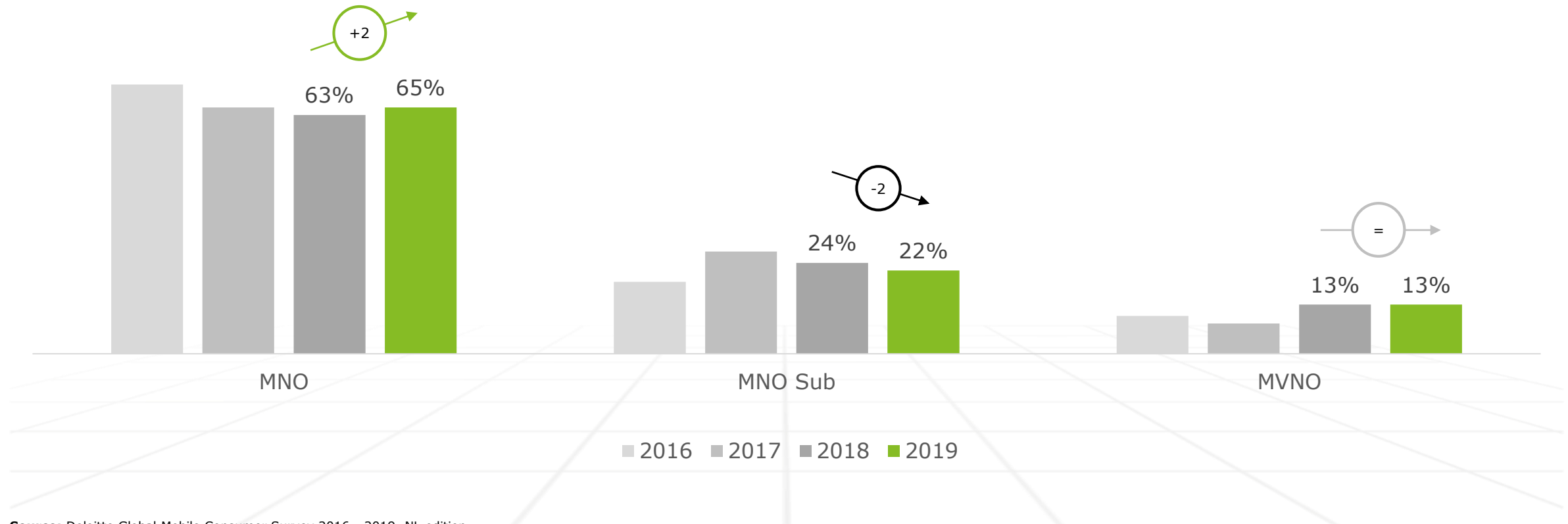
Is your main phone on...?



Source: Deloitte Global Mobile Consumer Survey 2018 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

MNO base has grown with 2% at the expense of MNO sub-brands

Which mobile operator do you use for your main phone?



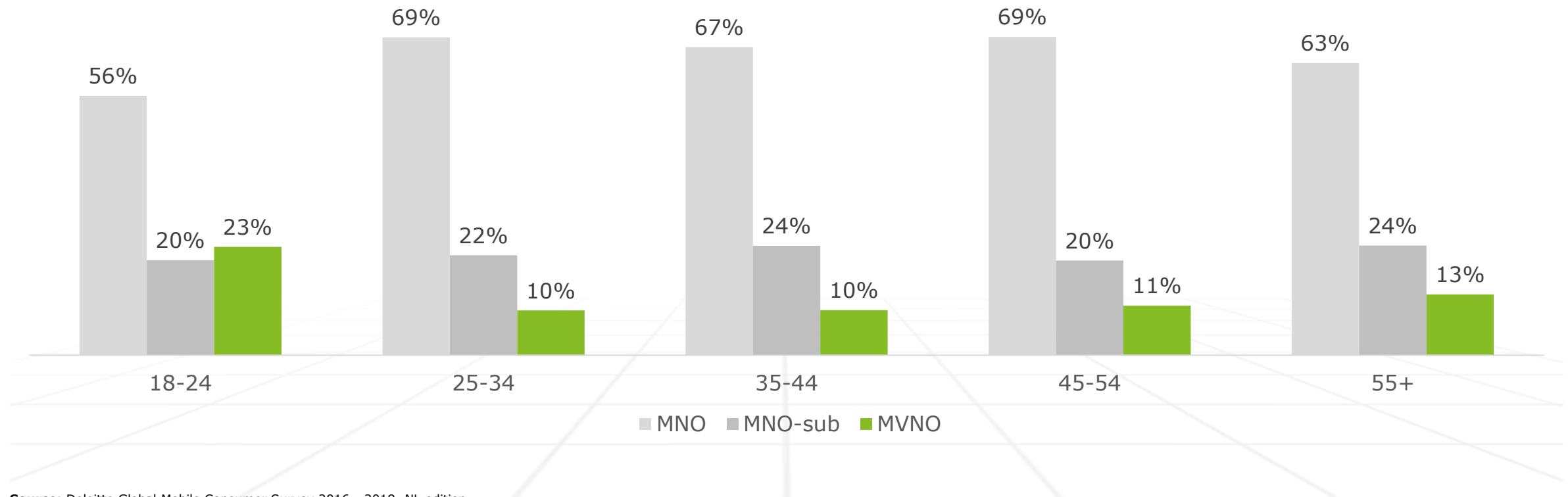
Source: Deloitte Global Mobile Consumer Survey 2016 - 2019, NL edition

Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

MNO: KPN, T-Mobile, Vodafone, Tele2, MNOsub: Telfort, Ben, Simyo, Hollandsnieuwe, Ziggo, MVNO: all other brands

MVNO's are most popular with the youngest age group

Which mobile operator do you use for your main phone?



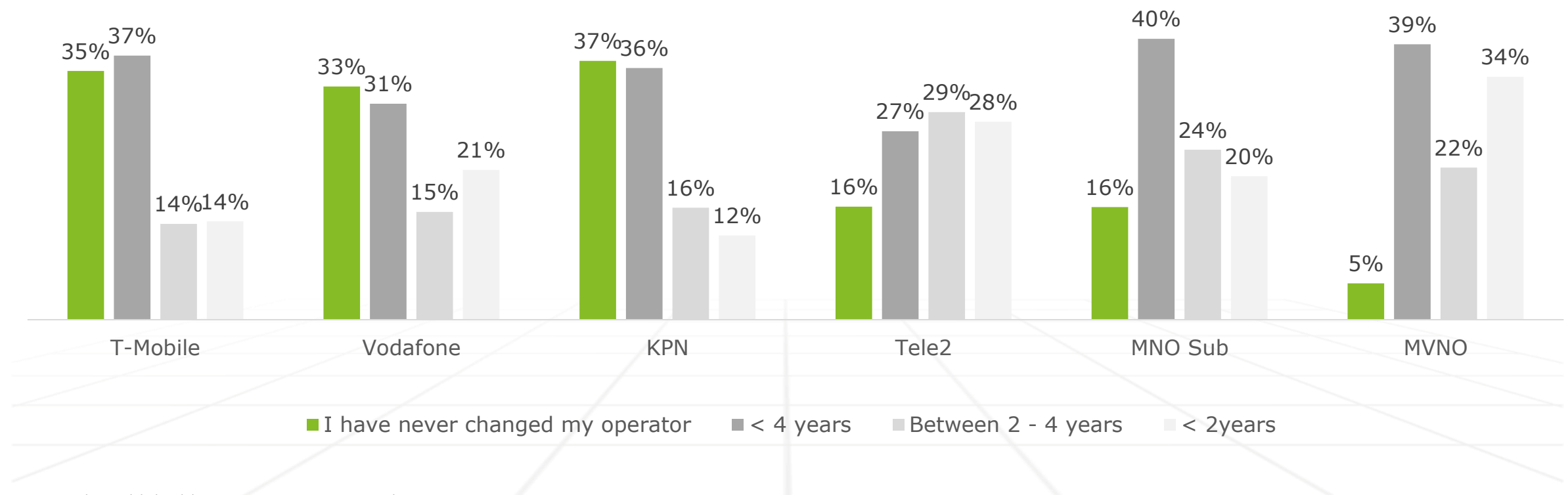
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Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

MNO: KPN, T-Mobile, Vodafone, Tele2, MNOsub: Telfort, Ben, Simyo, Hollandsnieuwe, Ziggo, MVNO: all other brands

The traditional big three brands have the highest share of customers who never switched mobile phone operator

When was the last time that you changed your mobile phone operator?



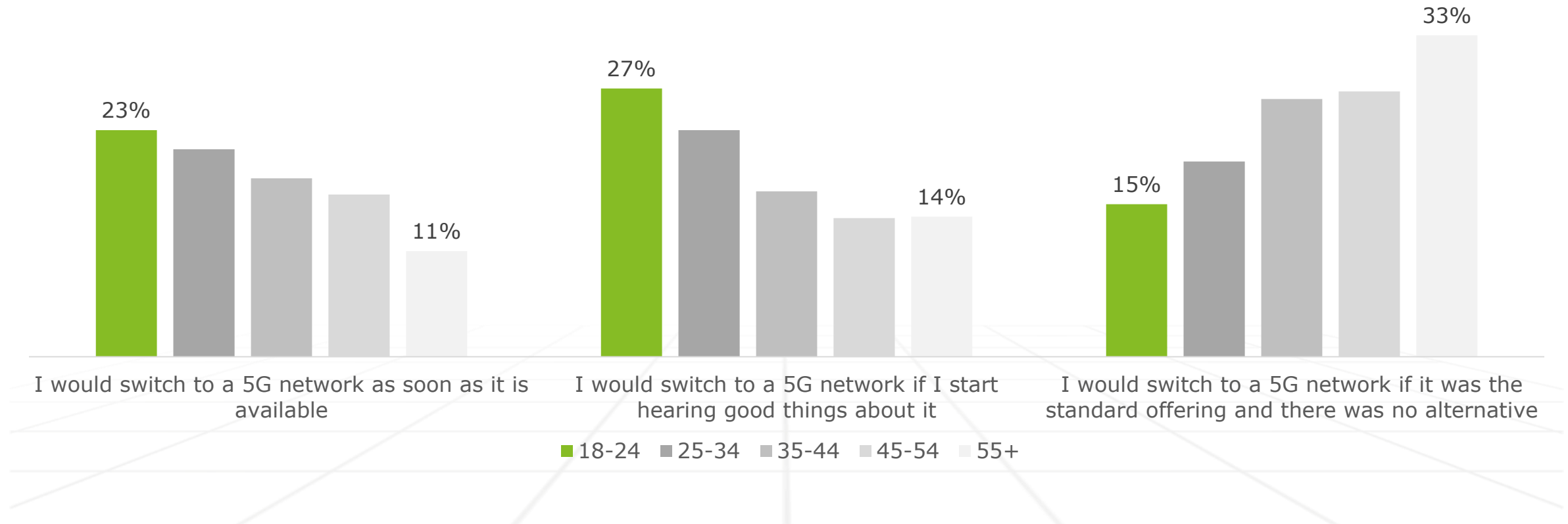
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Younger age groups are more willing to actively switch to 5G

Which of the following best describes your attitude towards 5G networks?

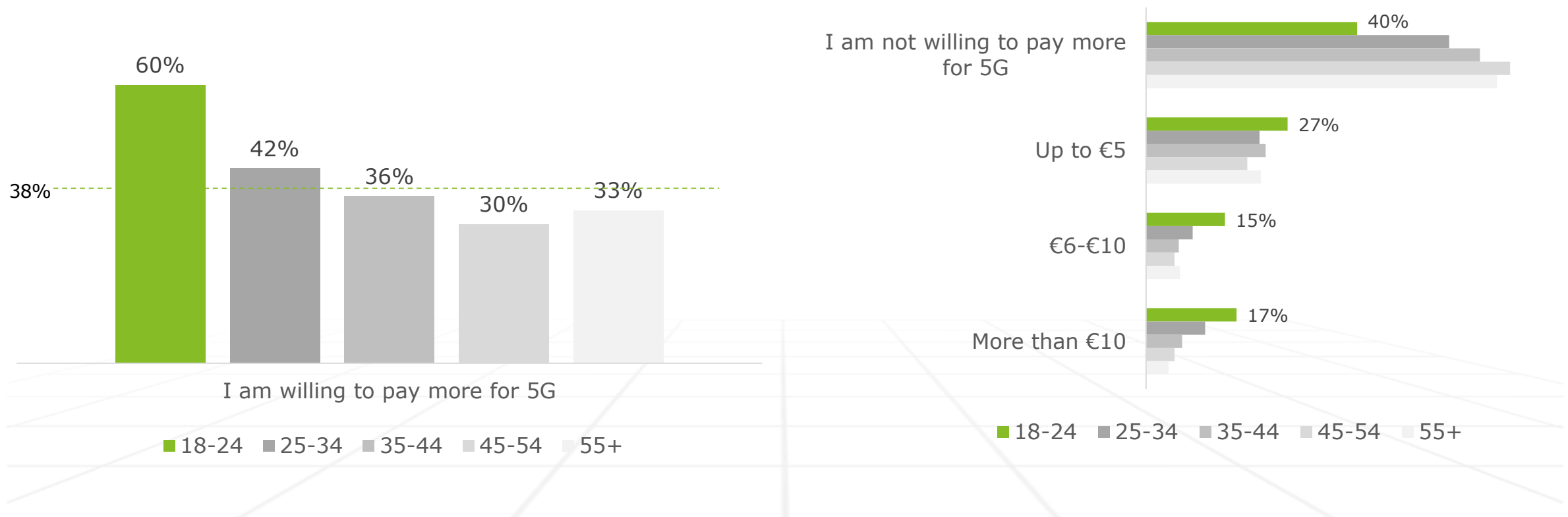


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

Younger age groups seem more willing to pay premium for 5G

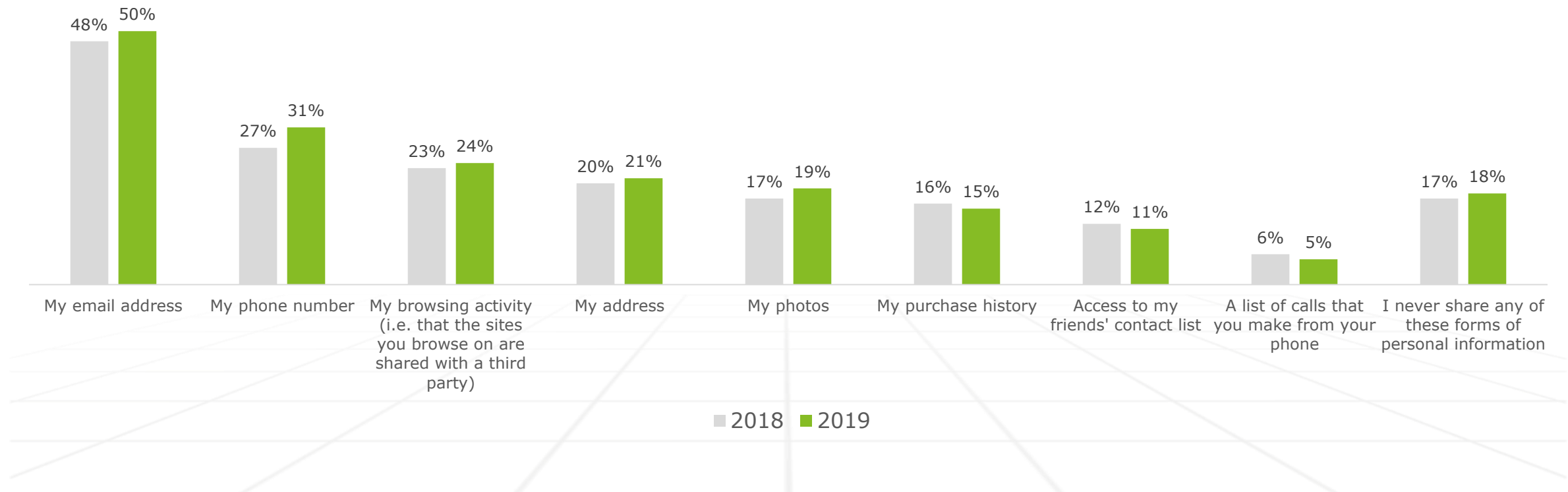
If 5G network speeds were ten times faster than those provided by 4G/LTE networks, how much more per month would you be willing to pay?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

Awareness around information sharing has increased for most information categories

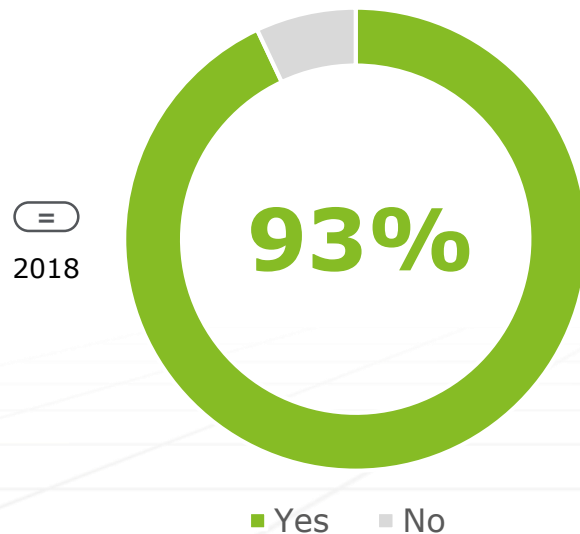
Thinking about companies which you may interact with online (such as Facebook, public Wi-Fi providers, online retailers), as far of you are aware, which information do you already share with them?



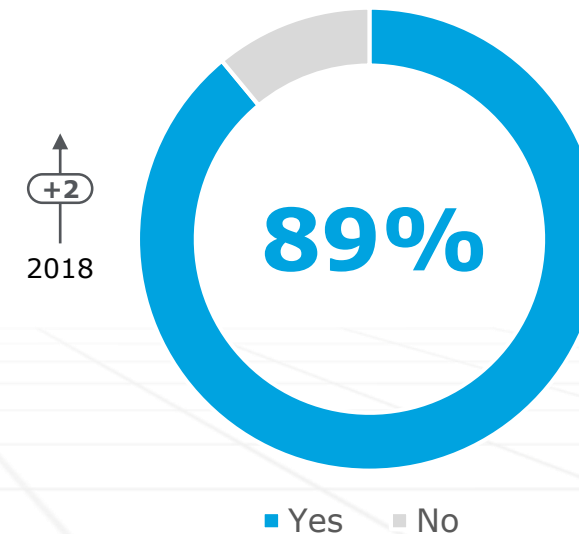
Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

There is a slight increase in belief that companies share personal data with third parties

Do you believe the companies you interact with online use your personal data?



Do you believe that the companies you interact with online share your personal data with third parties (e.g. social networks sharing data with retailers)?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

People are more concerned about their data being shared with third parties, compared to using or storing their personal data

To what extent, if at all, would you say you are concerned about how companies you interact with online...?

Use your personal data



■ Concerned

62%

Store your personal data



■ Concerned

64%

Share your personal data with third parties



■ Concerned

72%

Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All adults 18-70 who think companies use or share their personal data, 2019 n = 1578

Most people increasingly accept the terms and conditions without reading them

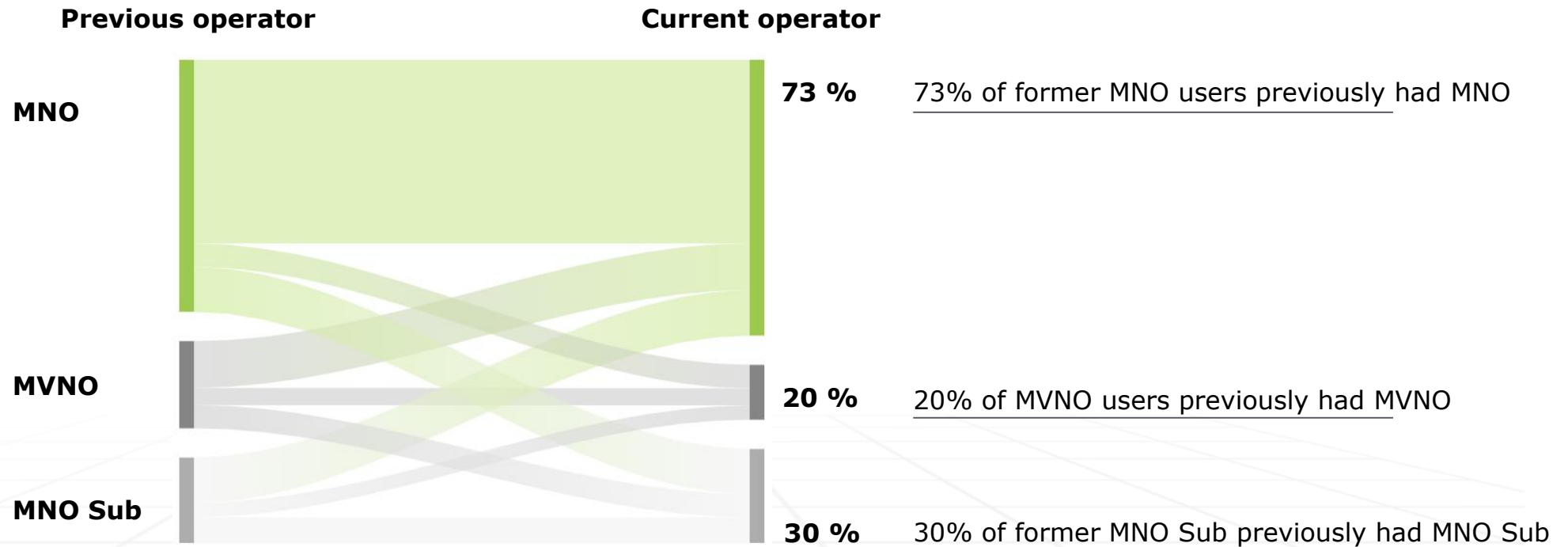
How often, if at all, do you accept terms and conditions without reading them?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents owning a smartphone (NL edition: n=1860)

MNO customers show lowest churn, while MVNO customers seem least loyal

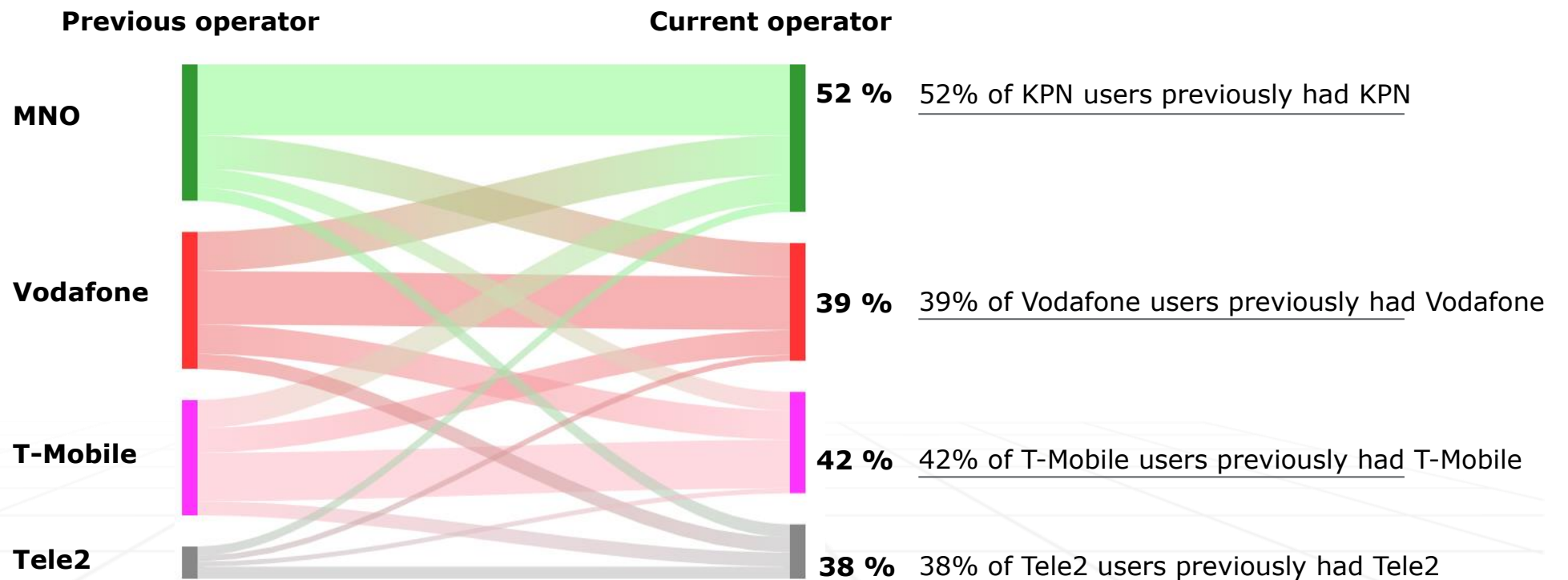
Which operator were you previously with?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

KPN customers show lowest churn, while Tele2 customers seem least loyal

Which operator were you previously with?

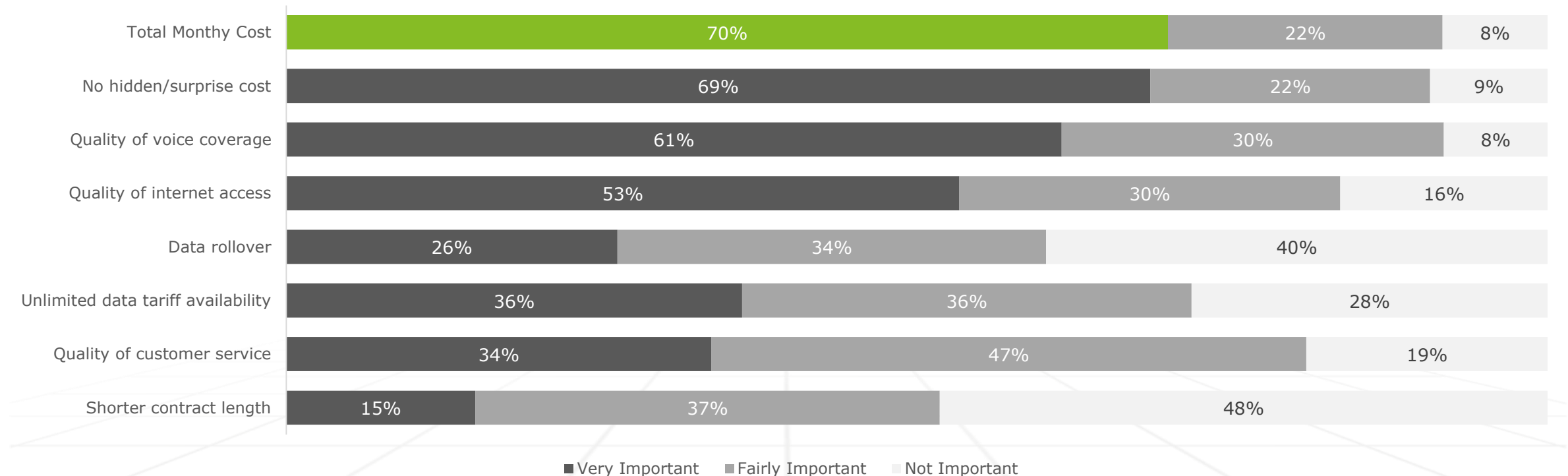


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a phone and have an MNO brand as a current and previous operator, 2019 n = 863

Monthly cost is the main reason for choosing a provider, followed by no hidden costs and quality of voice coverage

Which services are important to you?

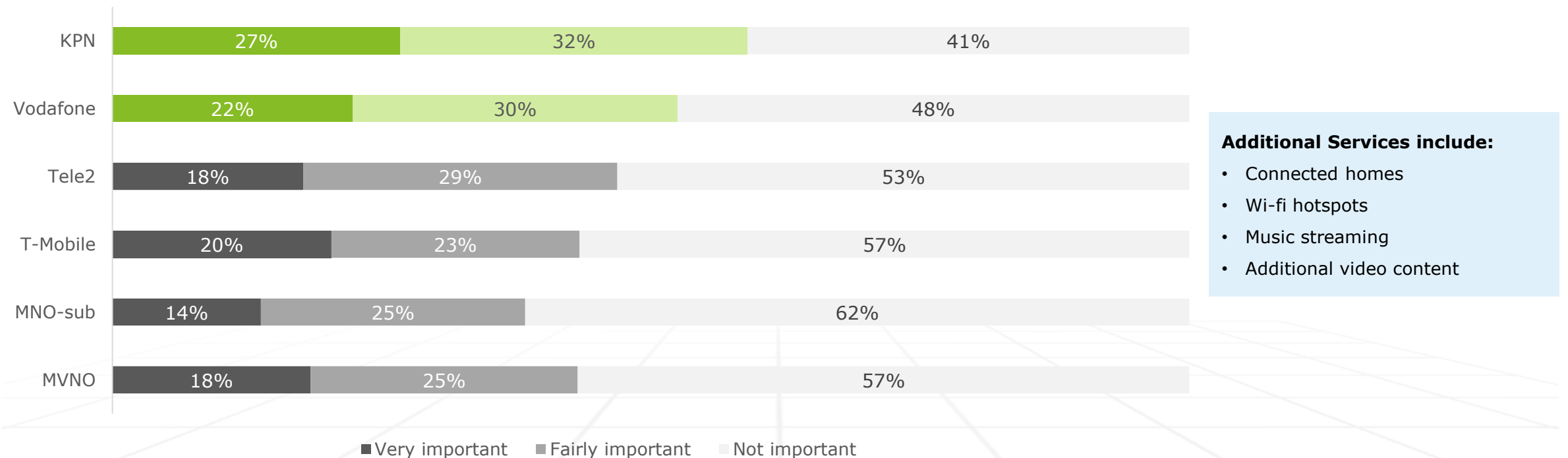


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

Vodafone and KPN customers find availability of additional services more important than customers of other operators

Are additional services important to you?



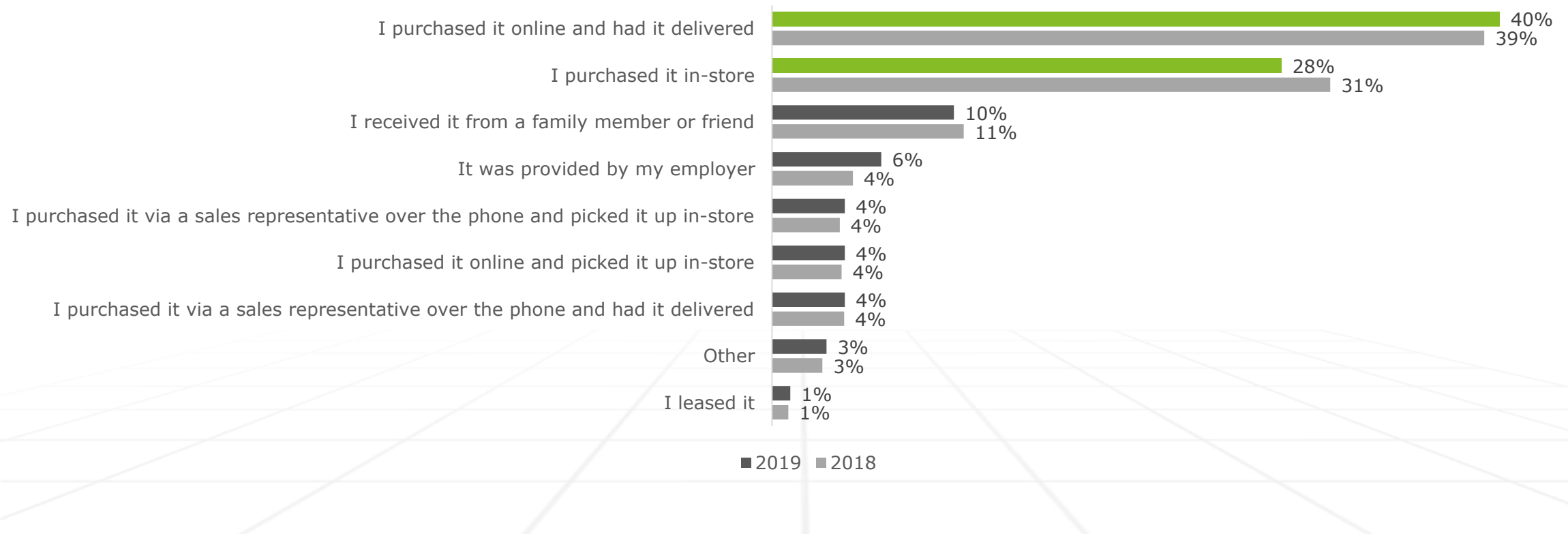
Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

MNO: KPN, T-Mobile, Vodafone, Tele2, MNOsub: Telfort, Ben, Simyo, Hollandsnieuwe, Ziggo, MVNO: all other brands

Online purchases increased in 2019, whereas in-store purchases have declined

Which, if any, of the following apply to how you got your current phone?

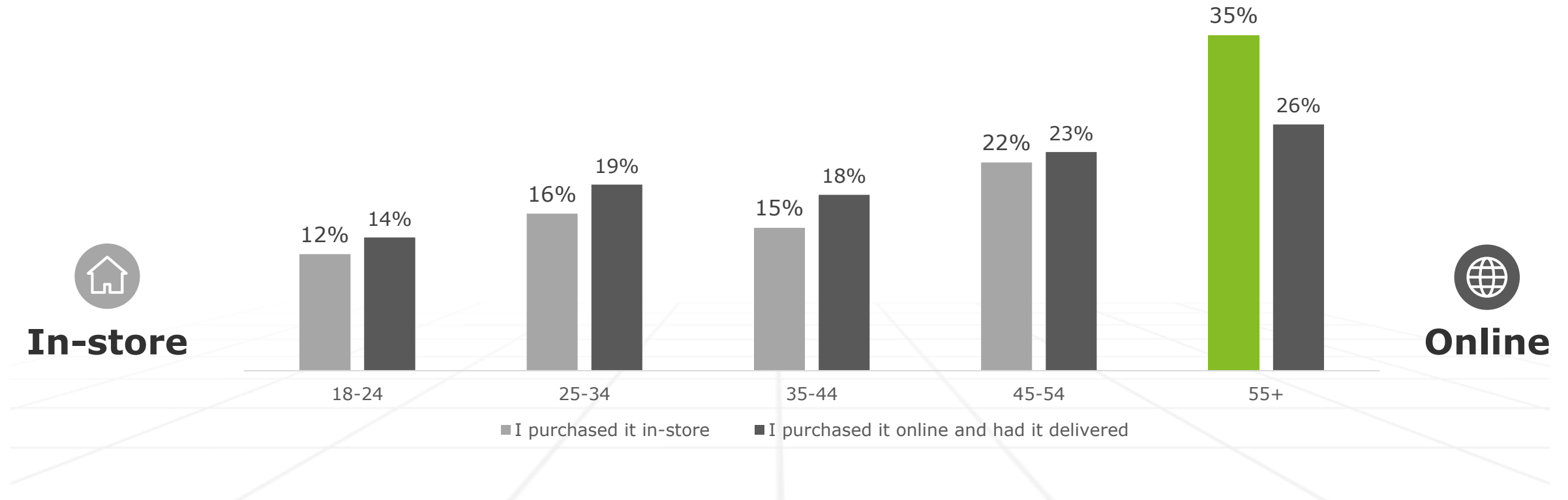


Source: Deloitte Global Mobile Consumer Survey 2018, NL edition

Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

In-store purchases are strongly preferred over online purchases only by the 55+ age group

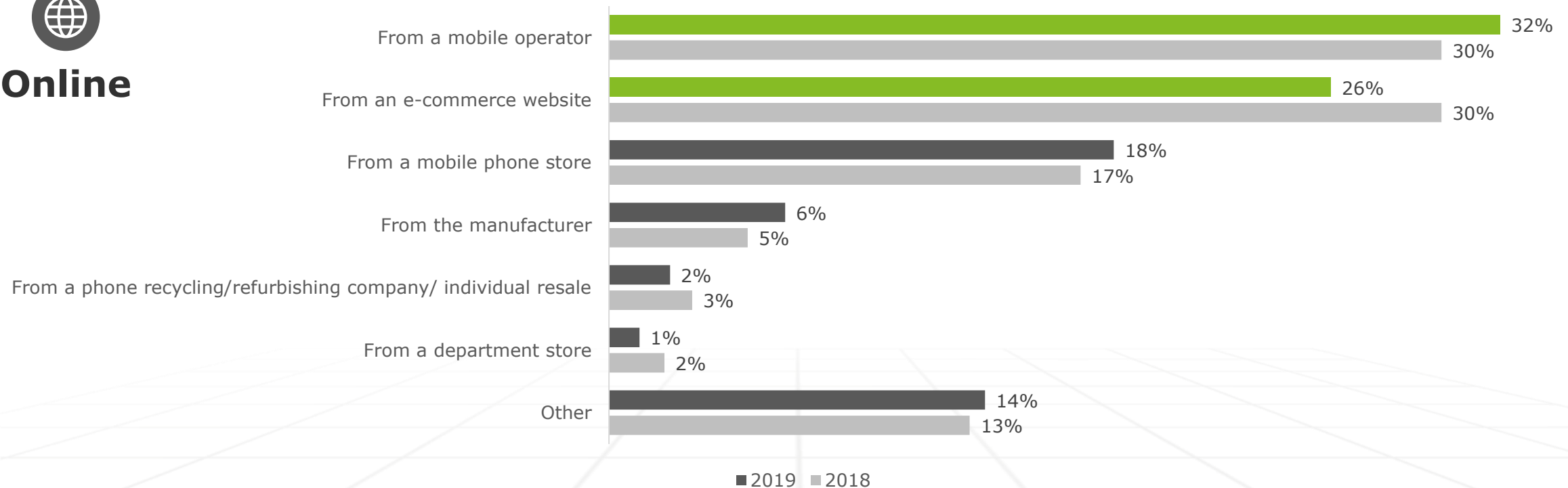
Which, if any, of the following apply to how you got your current phone?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

Online phone purchases decreased for e-commerce websites, while mobile operators see an increase

You said you purchased your current phone online, which of the following best describes where you purchased it from?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

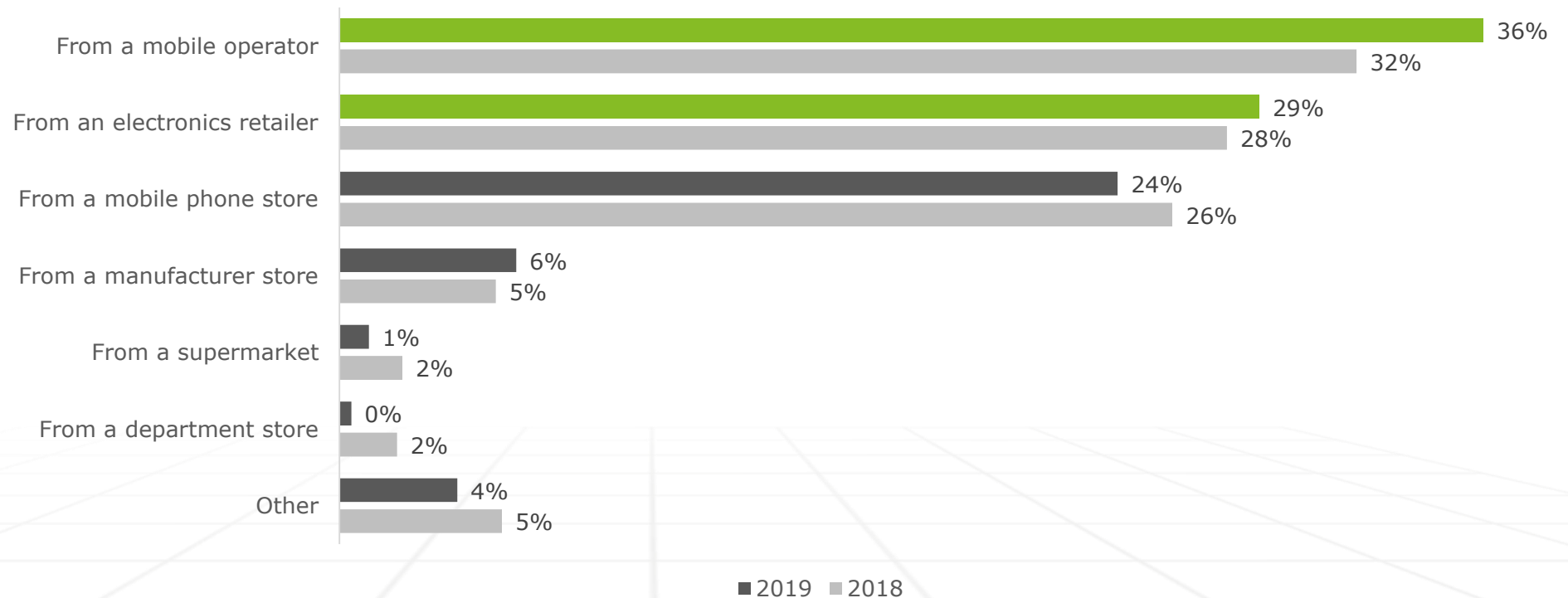
Weighted Base: All respondents who bought their phone or smartphone online (2019 NL Edition: n=838)

Mobile operator stores and electronic retailers are the most used channels for in-store phone purchases

You said you purchased your current phone in-store, which of the following best describes where you purchased it from?



In-store

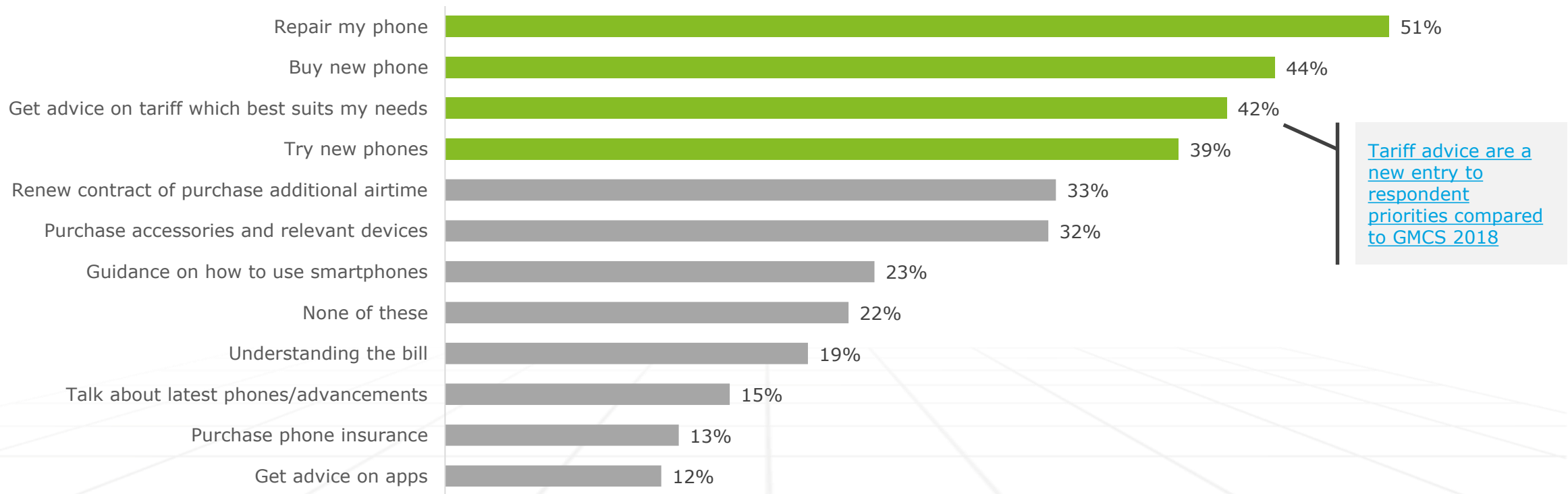


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents who bought their phone or smartphone in-store (2019 NL Edition: n=544)

Most customers would like to be able to fix their phones, buy & try new phones and research tariffs in-stores

Which of the following things would you like to be able to do in an operator store?

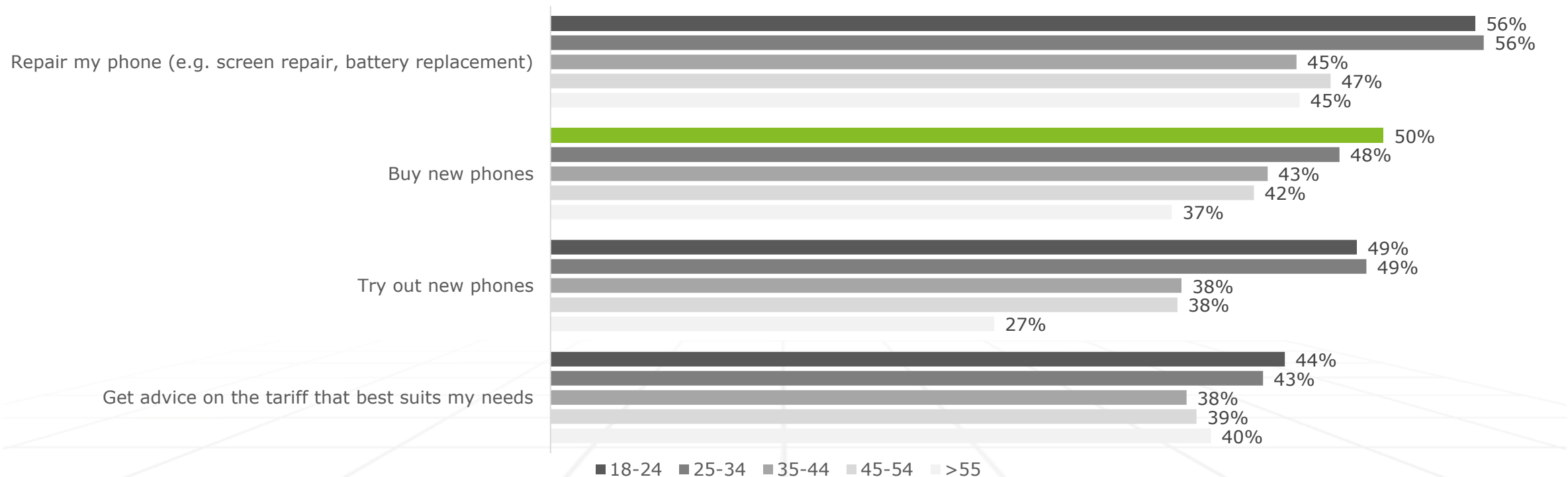


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

The 18-24 age category would most like to be able to buy a new phone in an operator store

Which of the following things would you like to be able to do in an operator store?

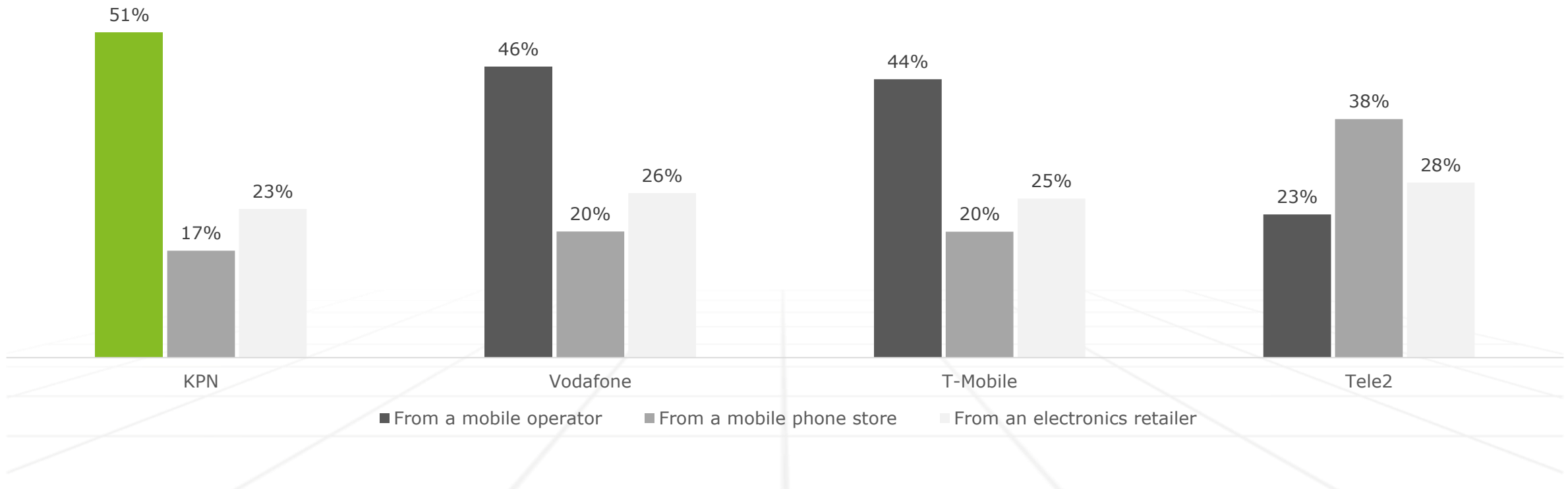


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

KPN has the highest share of customers who bought their phone from a mobile operator store

You said you purchased your current phone in-store, which of the following best describes where you purchased it from?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents who bought their phone or smartphone in-store (2019 NL Edition: n=544)

Usage

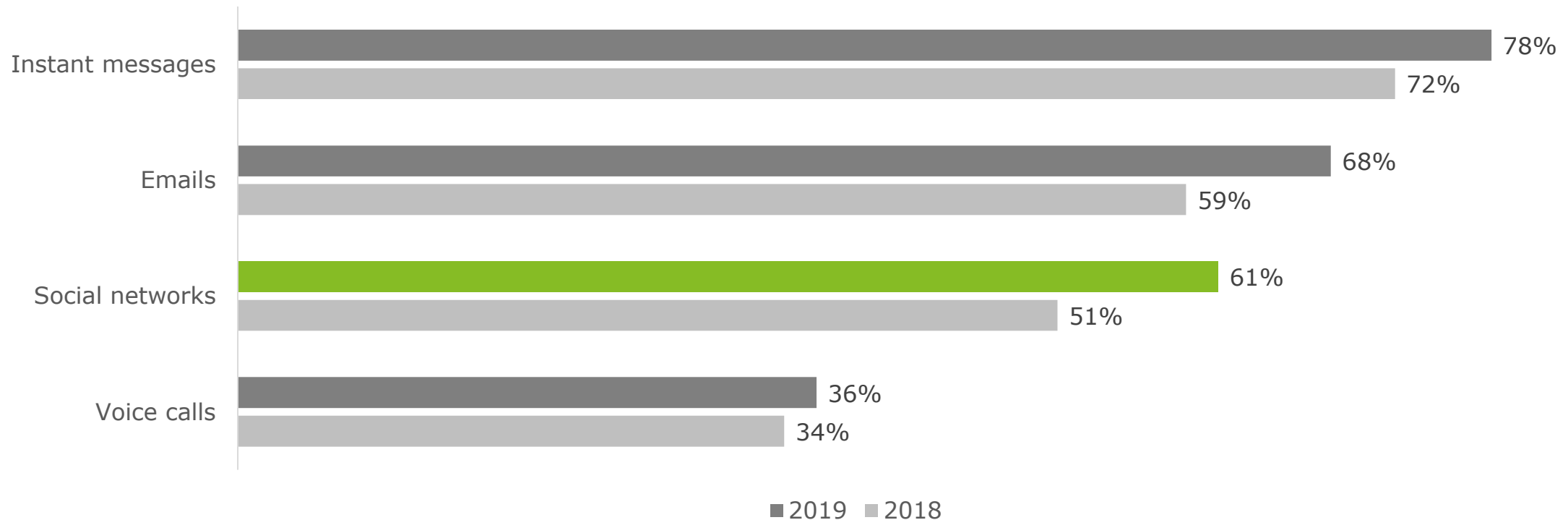


36%

of consumers use their mobile phone while riding a bike compared to 49% last year. Writing and reading texts and selecting music to stream are activities that are performed specifically.

Daily communication is mostly done via instant messaging, while social networks are showing the largest growth

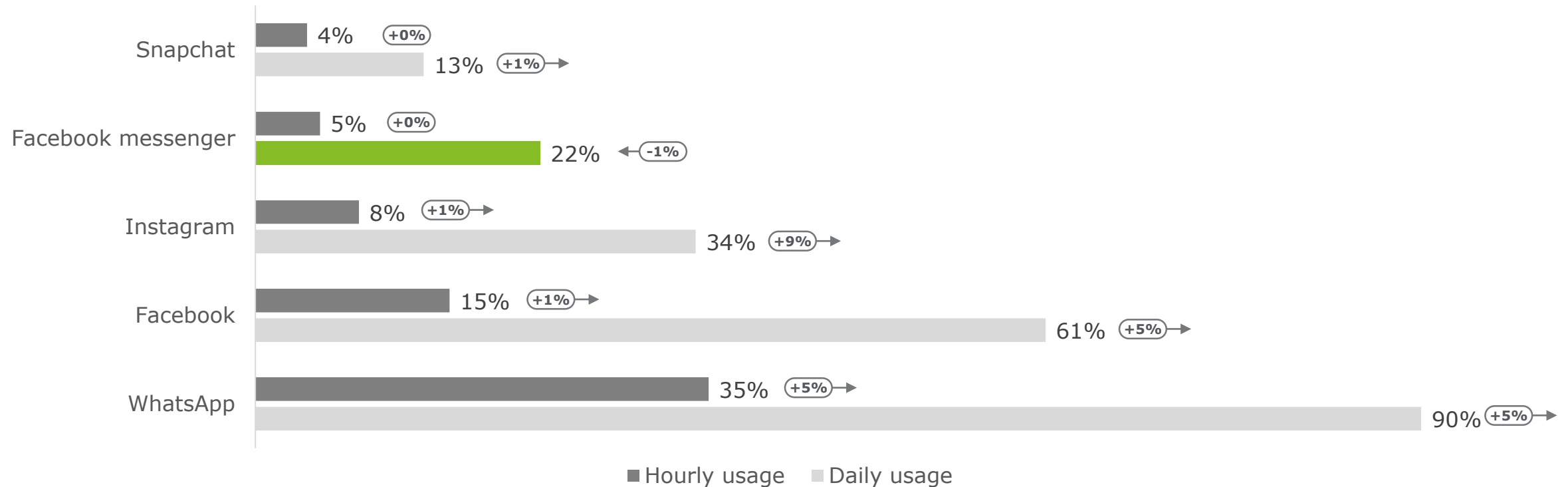
Do you use each of these on your mobile phone on a daily basis?



Source: Deloitte Global Mobile Consumer Survey 2018 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

Daily and hourly usage of most frequently used apps is increasing, except for Facebook messenger

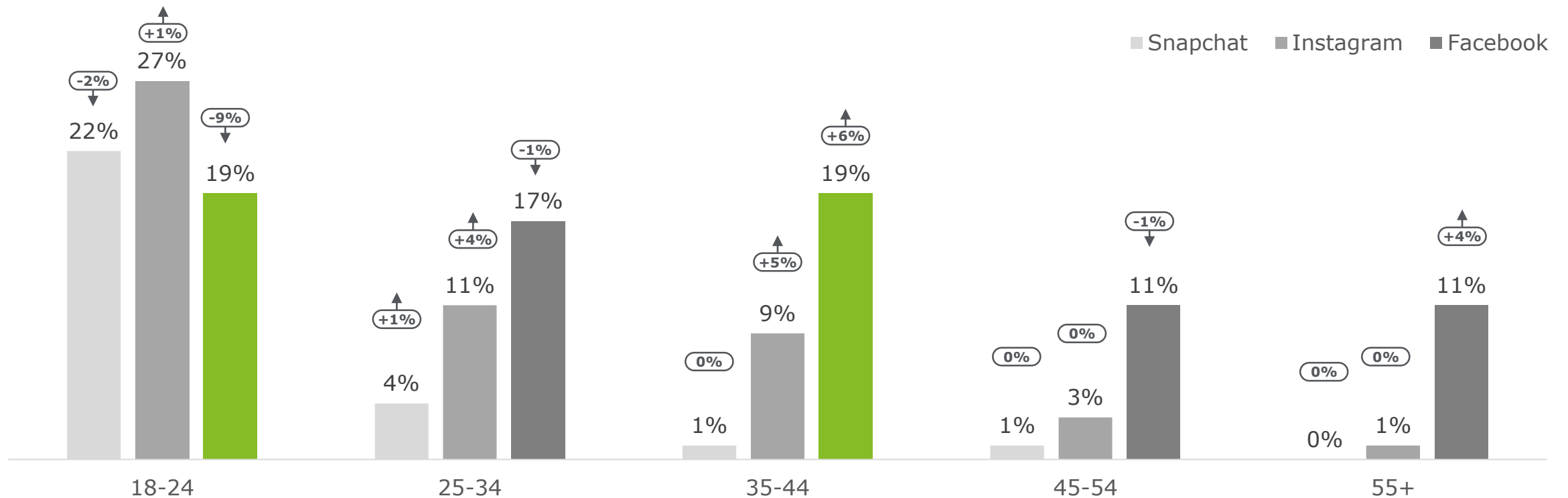
How often, if at all, do you use each of these on your mobile phone on a daily/hourly basis?



Source: Deloitte Global Mobile Consumer Survey 2018 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

In the 18-24 age group, hourly Facebook usage has decreased significantly, whereas the 35-44 age group has increased

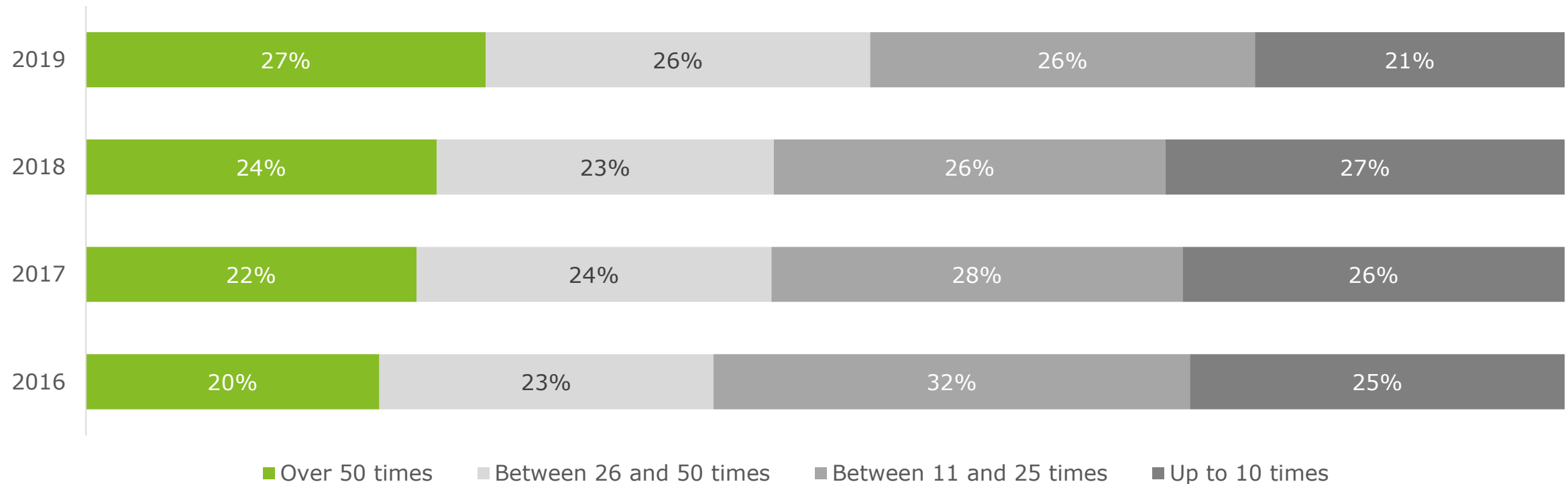
How often, if at all, do you use each of these on your mobile phone on an hourly basis?



Source: Deloitte Global Mobile Consumer Survey 2018 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

The number of times people look at their phone during the day keeps increasing

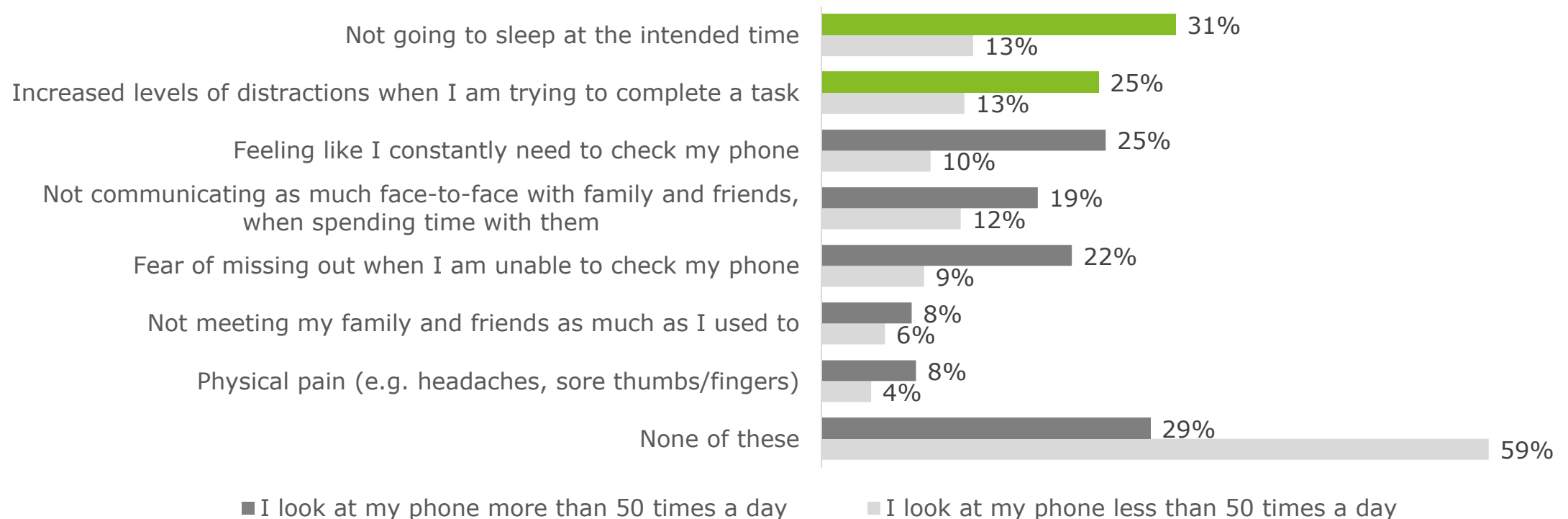
How many times would you estimate you look at your phone in a day?



Source: Deloitte Global Mobile Consumer Survey 2018 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

People that check their phone more than 50 times a day experience more negative side-effects than less frequent users

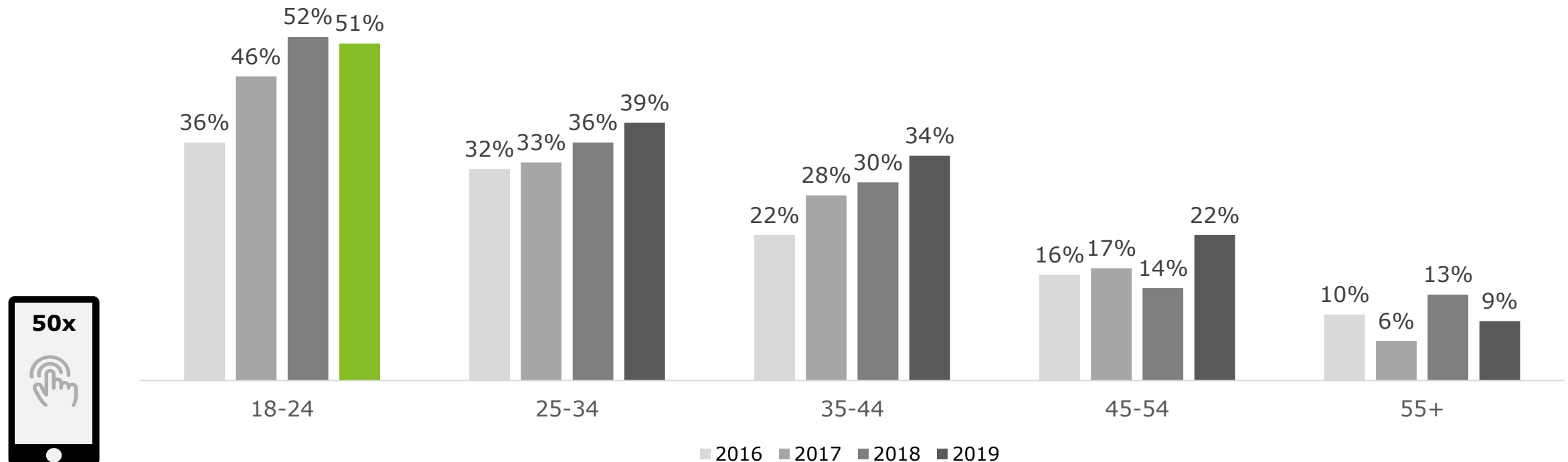
Which of the following, if any, do you experience as a result of using your smartphone (too much)?



Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

For the first time in four years a slight decrease is shown in the 18-24 age group looking at their phone more than 50 times a day

Would you estimate you look at your phone more than 50 times in a day?

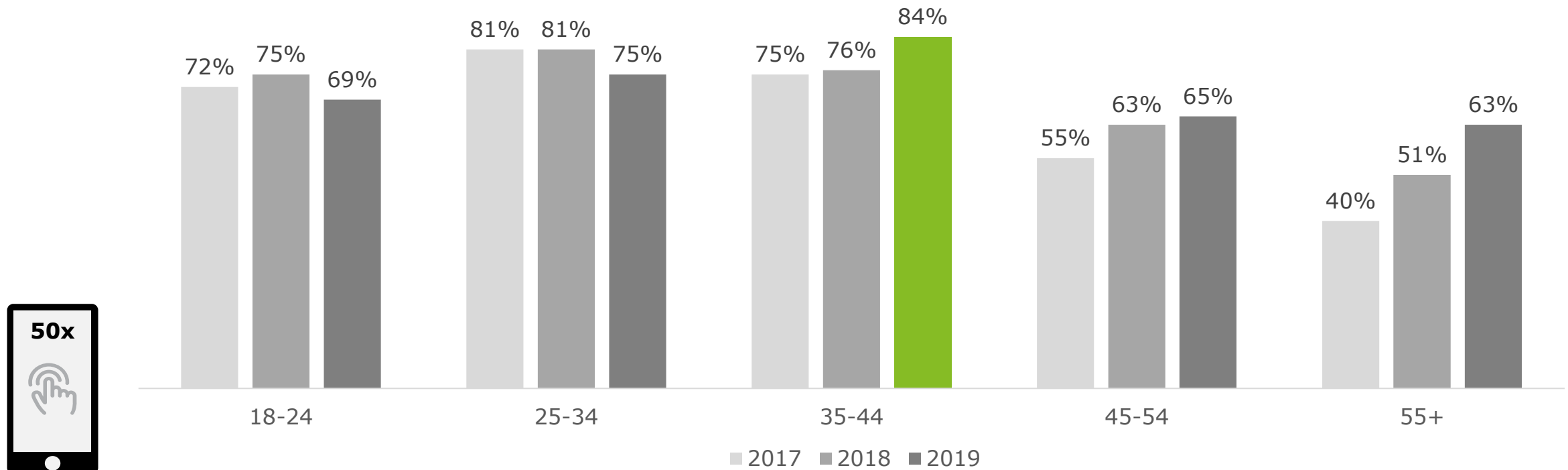


Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition

Weighted Base: All respondents owning a phone and look at their phones more than 50 times a day (2019 NL Edition: n=503)

Consumers older than 35 years are increasingly annoyed by their own mobile phone usage

**Overall, do you think you use your mobile phone too much, or not?
Yes, I think I use my mobile phone too much**



Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition

Weighted Base: All respondents owning a phone and look at their phones more than 50 times a day (2019 NL Edition: n=503)

Women tend to be more annoyed by their own phone usage than men

Overall, do you think you use your mobile phone too much, or not?

75%



69%

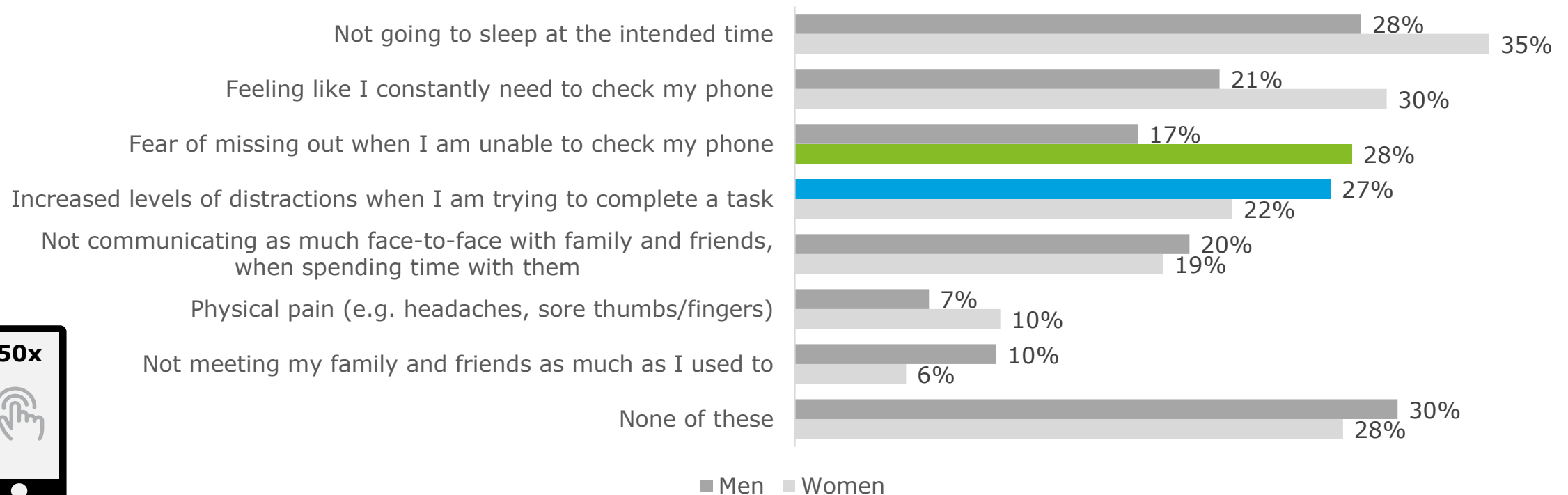


Source: Deloitte Global Mobile Consumer Survey 2013 – 2019, NL edition

Weighted Base: All respondents owning a phone and look at their phones more than 50 times a day (2019 NL Edition: n=503)

Due to frequent smartphone usage, women mostly experience the fear of missing out while men mostly feel distracted

Which of the following, if any, do you experience as a result of using your smartphone (too much)?

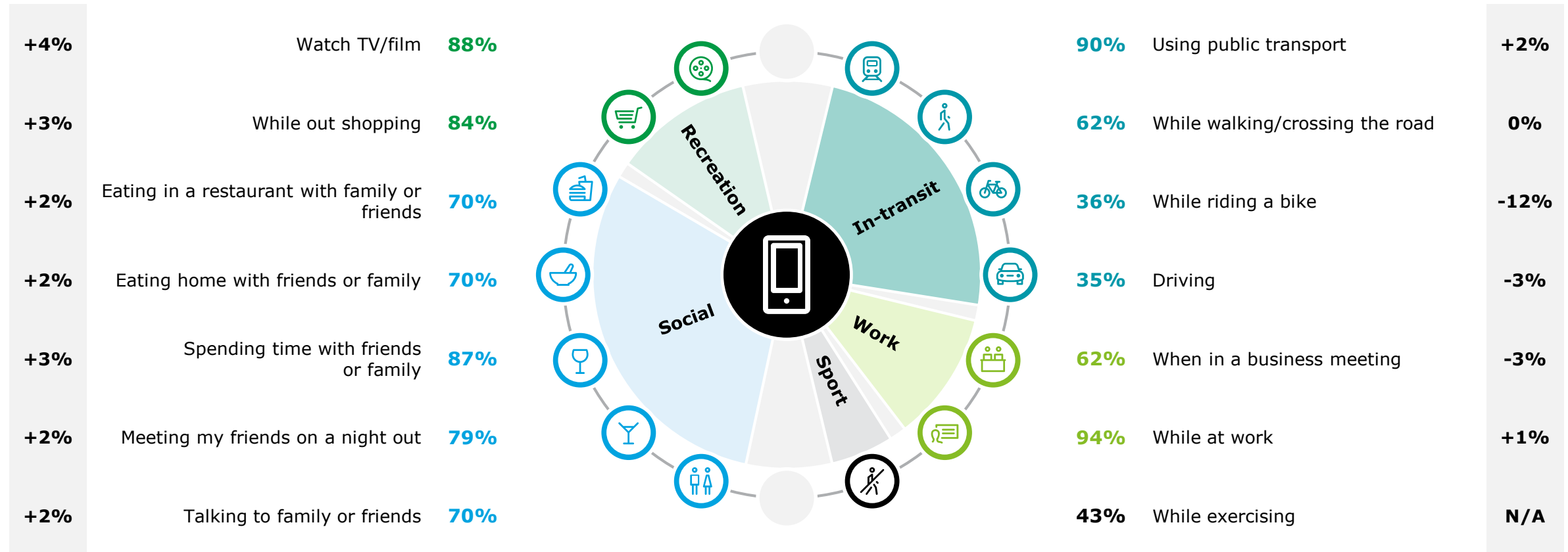


Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition

Weighted Base: All respondents owning a phone and look at their phones more than 50 times a day (2019 NL Edition: n=503)

Phone usage increased for almost every activity type, except for riding a bike, driving and being in a business meeting

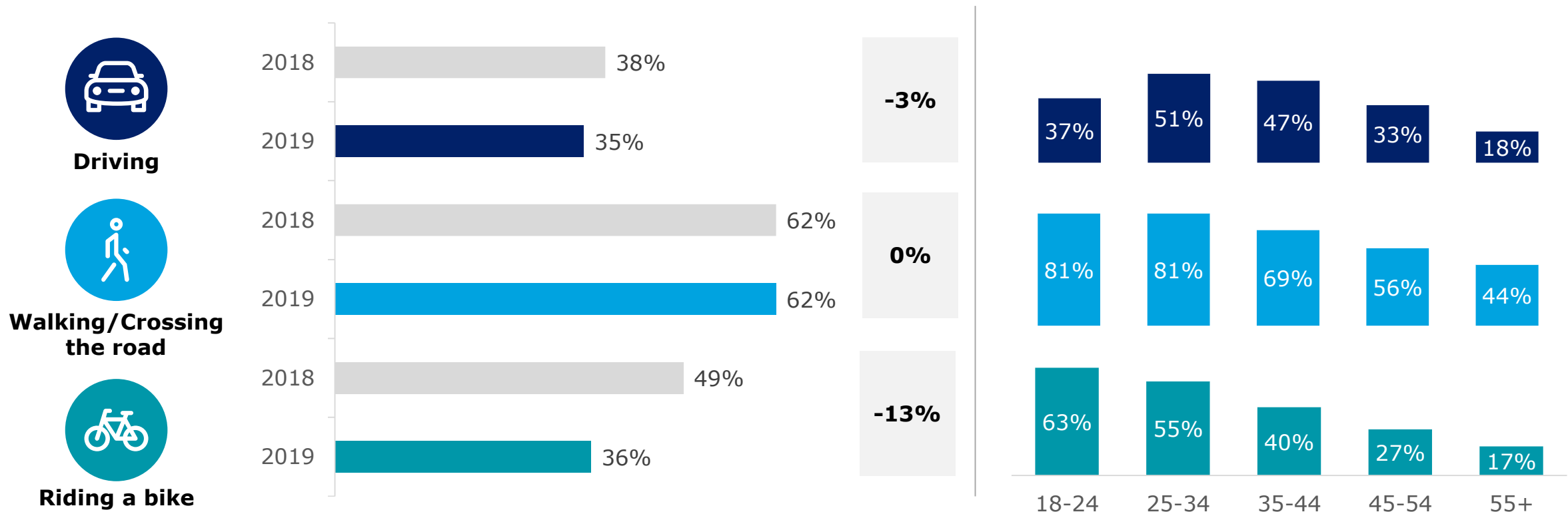
How frequently, if at all, do you use your mobile phone while doing the following?



Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

Consumers using their phone while riding a bike decreased by 13%

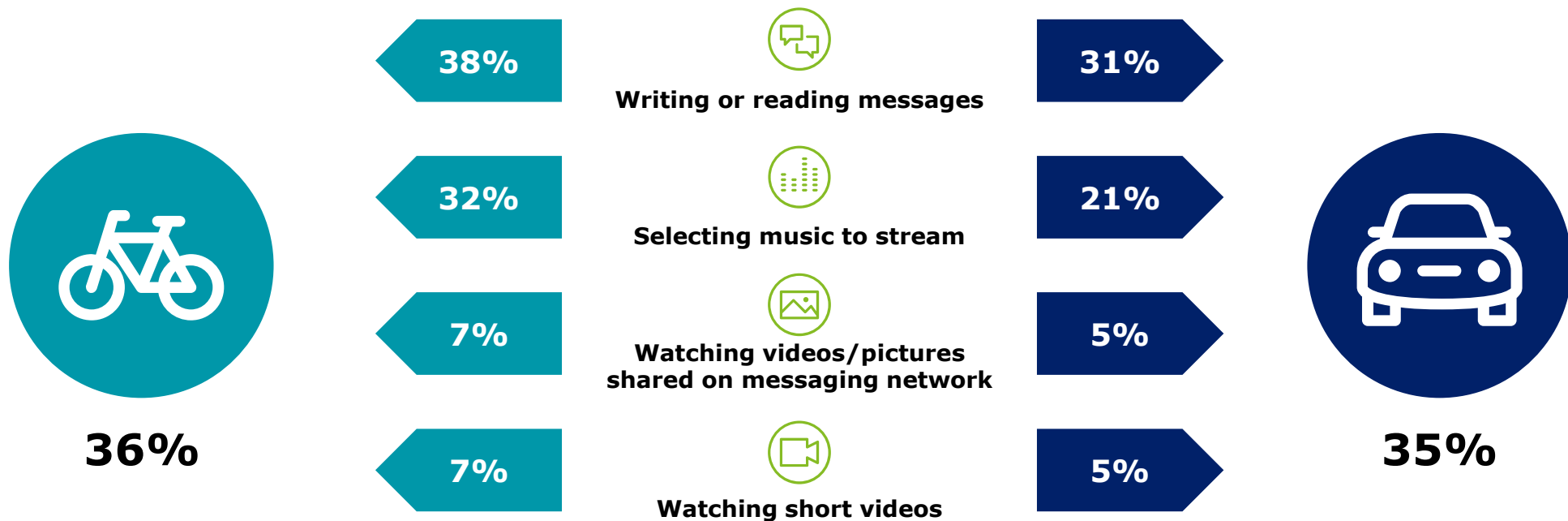
How frequently, if at all, do you use your mobile phone while doing the following?



Source: Deloitte Global Mobile Consumer Survey 2018 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

If consumers use their phone while driving, they are mostly writing and reading messages or selecting music to stream

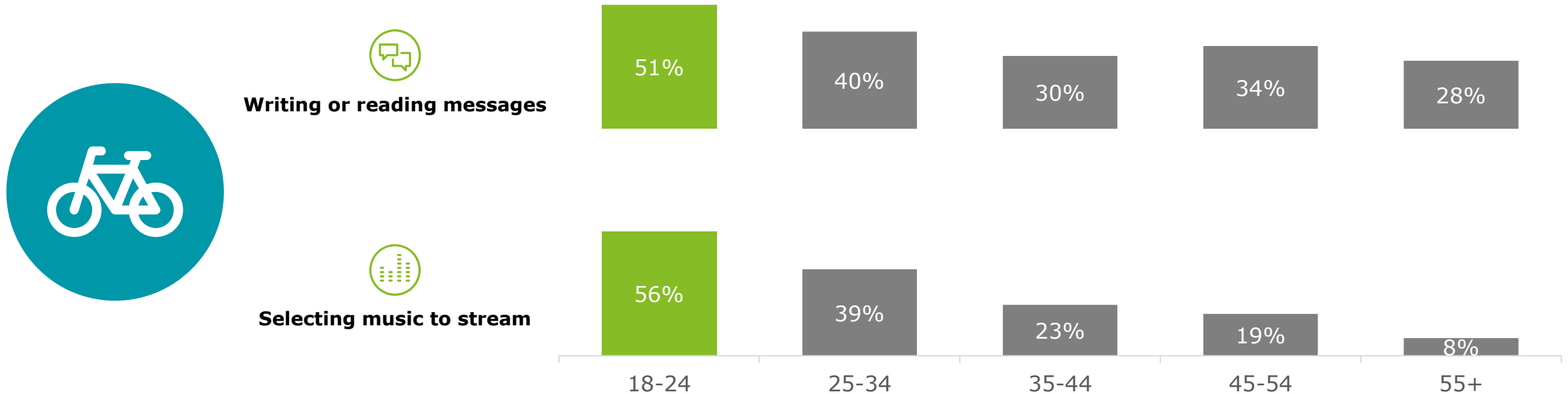
For which of the following activities, if any, do you use your smartphone while cycling/driving?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents (2019: n=659 (cycling) and n=616 (car))

Most consumers in the age group 18-24 make are texting and selecting music while cycling

For which of the following activities, if any, do you use your smartphone while cycling?

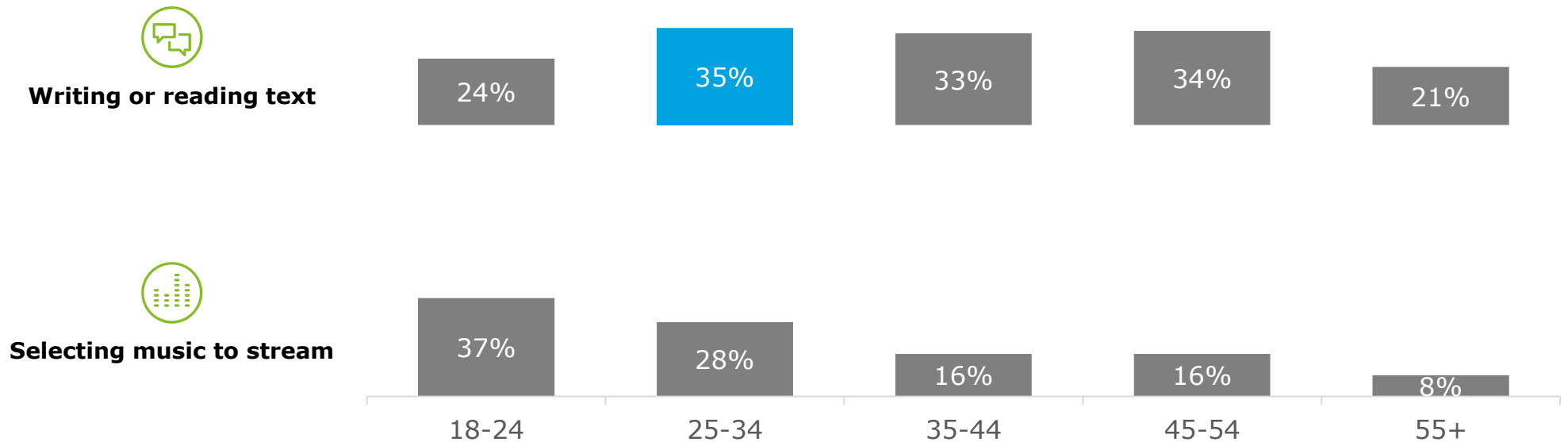


Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition

Weighted Base: All respondents (2019: n=659 (cycling))

People in the age of 25-34 write or read texts more often on while driving compared to other age groups

For which of the following activities, if any, do you use your smartphone while driving?

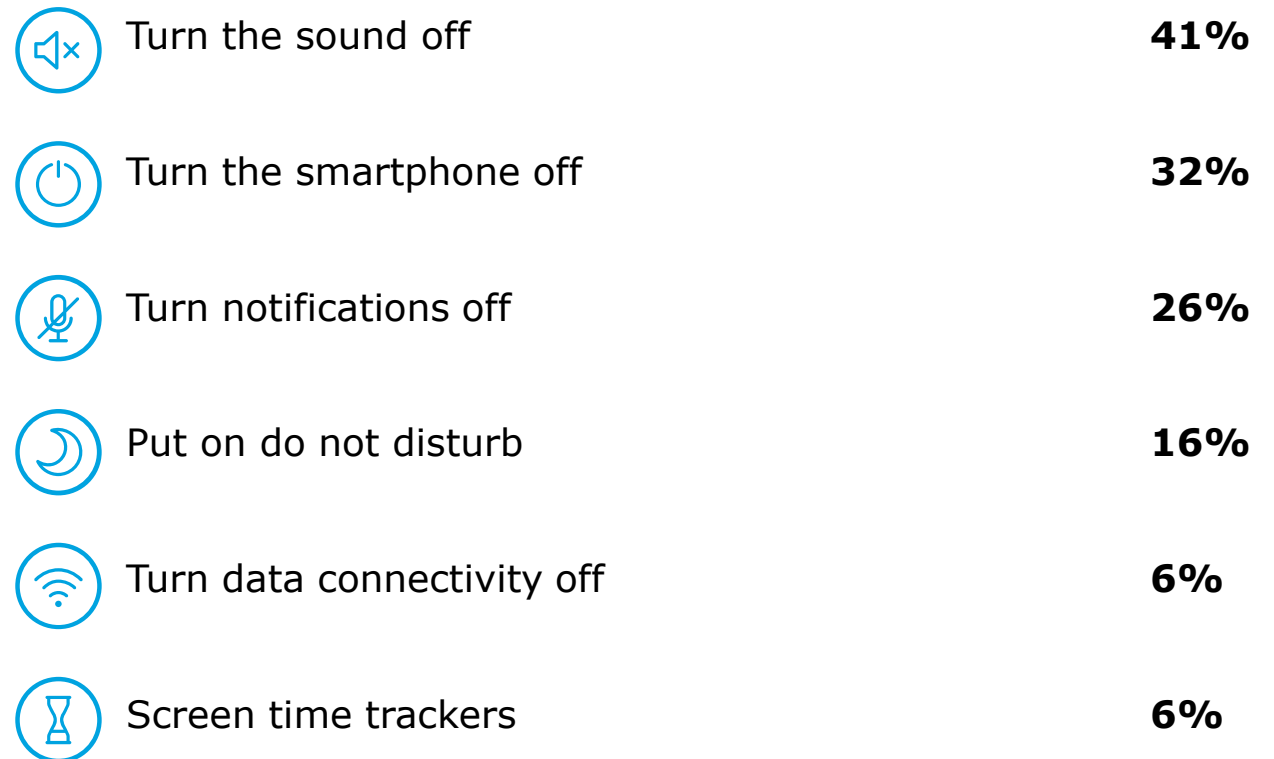
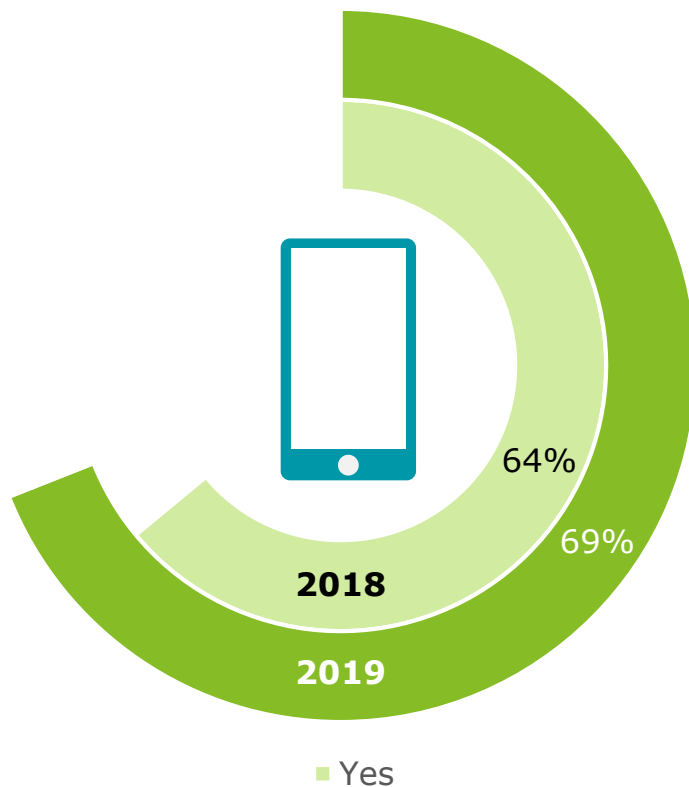


Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition

Weighted Base: All respondents (2019: n=616 (car))

One third of the people actively try to limit their phone use, primarily by turning the sound or smartphone off

Do you try to limit your smartphone usage, and if yes: how?



Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition
Weighted Base: All respondents owning a phone (2019 NL Edition: n=1934)

From the people that are using the screen time tracker 46% finds this functionality somewhat useful

How useful, if at all, do you find the screen time tracker for managing your phone usage?



Not at all useful

4%

Very useful

24%

Not very useful

26%

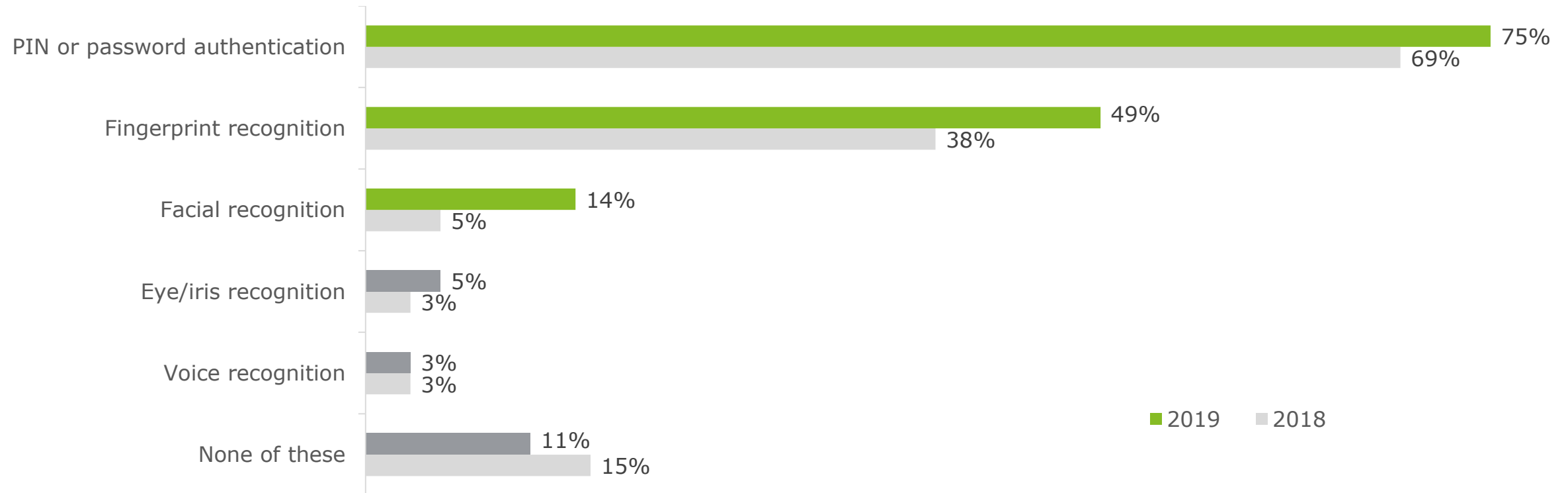
Somewhat useful

46%

Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition
Weighted Base: All respondents that use the screen time tracker (2019: n=107)

Unlocking via identification has increased, with the highest growth seen in finger recognition and facial recognition

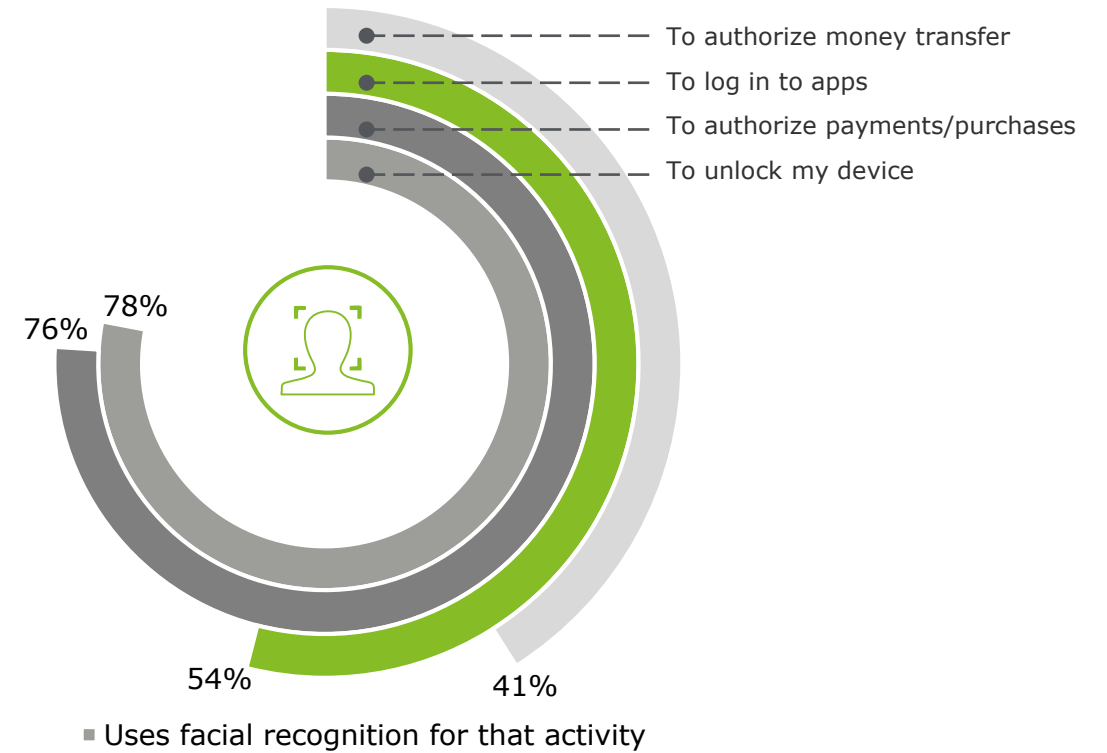
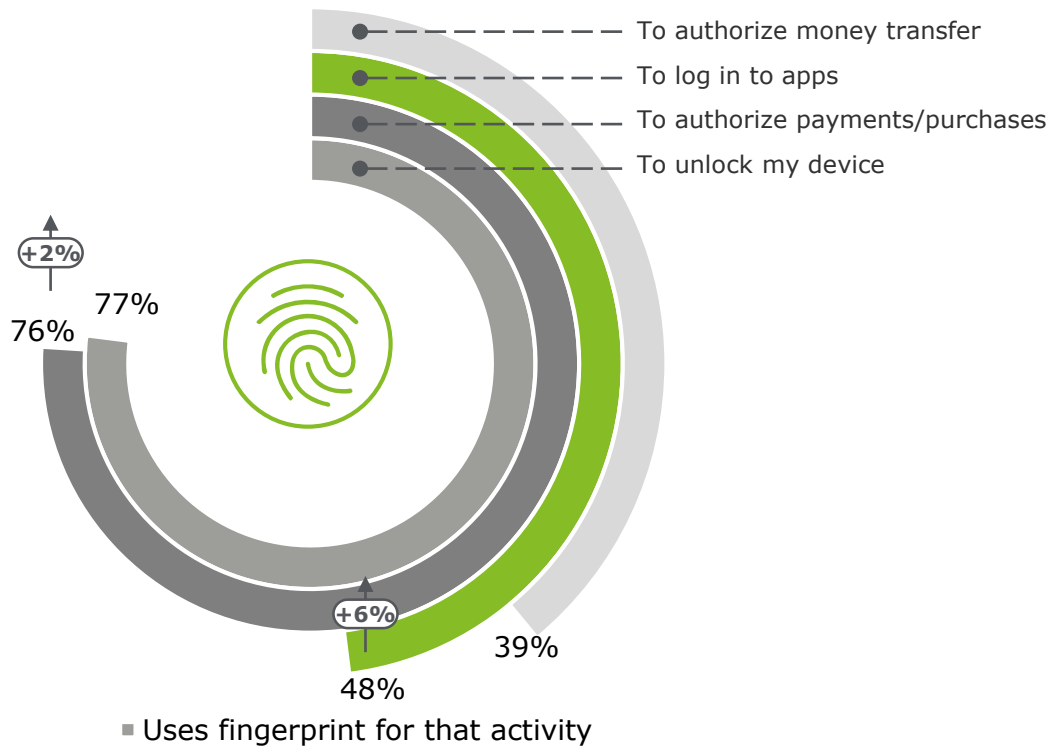
Which, if any, of the methods listed below have you used to identify yourself when unlocking your smartphone, authorizing mobile payments or other transactions?



Source: Deloitte Global Mobile Consumer Survey 2013 - 2019, NL edition
Weighted Base: All respondents owning a smartphone (NL edition: n=1860)

48% of fingerprint users use it to log into apps and 54% of facial recognition users use that to log in to apps

How do you use these methods to identify yourself?

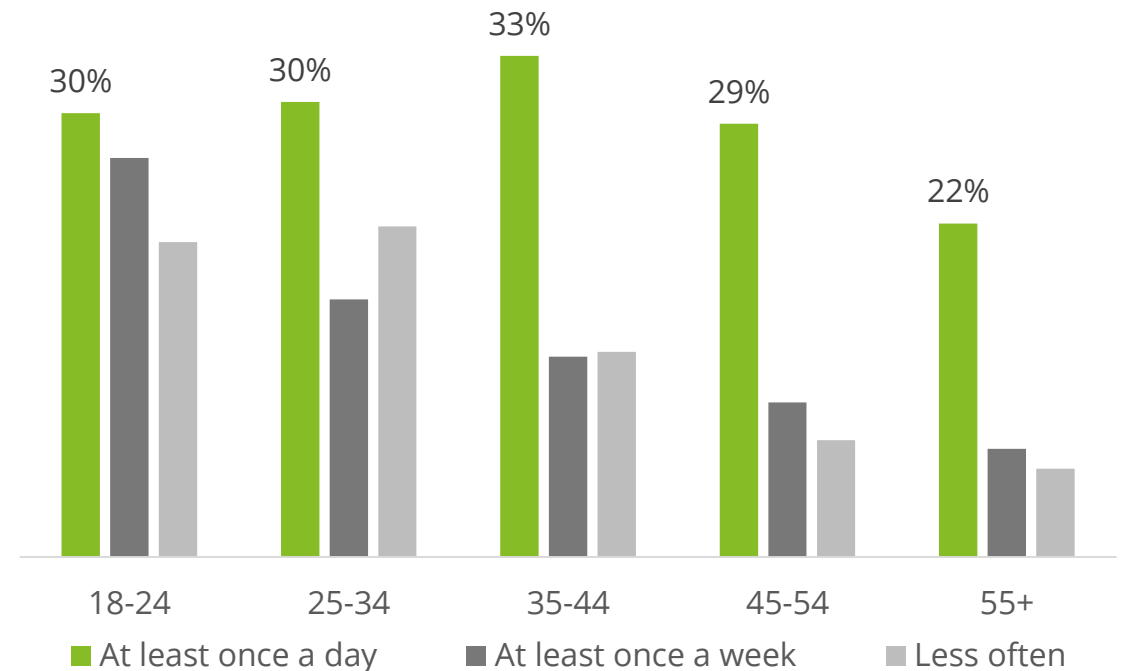
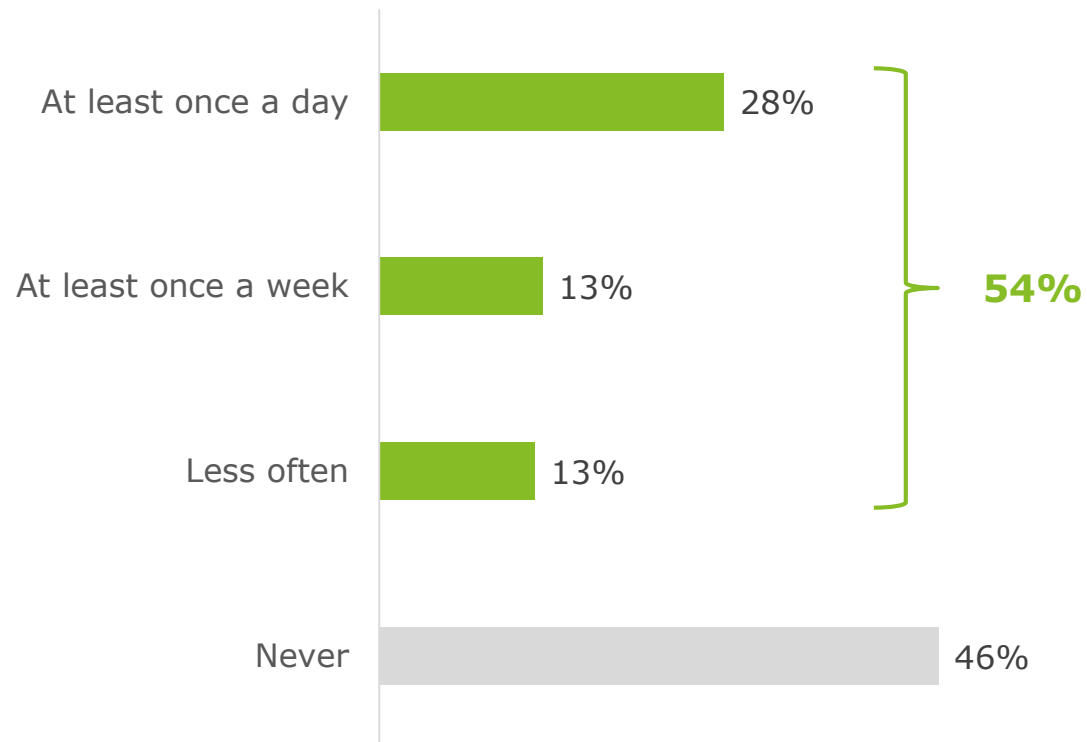


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents who have used fingerprint or facial recognition on their smartphone (2019: n=920)

The majority of the people owning a smartphone plays games on their device, daily gaming is done by all groups

Do you use your mobile phone to play games?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents owning a smartphone (NL edition: n=1860)

53% of the mobile gamers are women, Apple phone owners tend to game more often

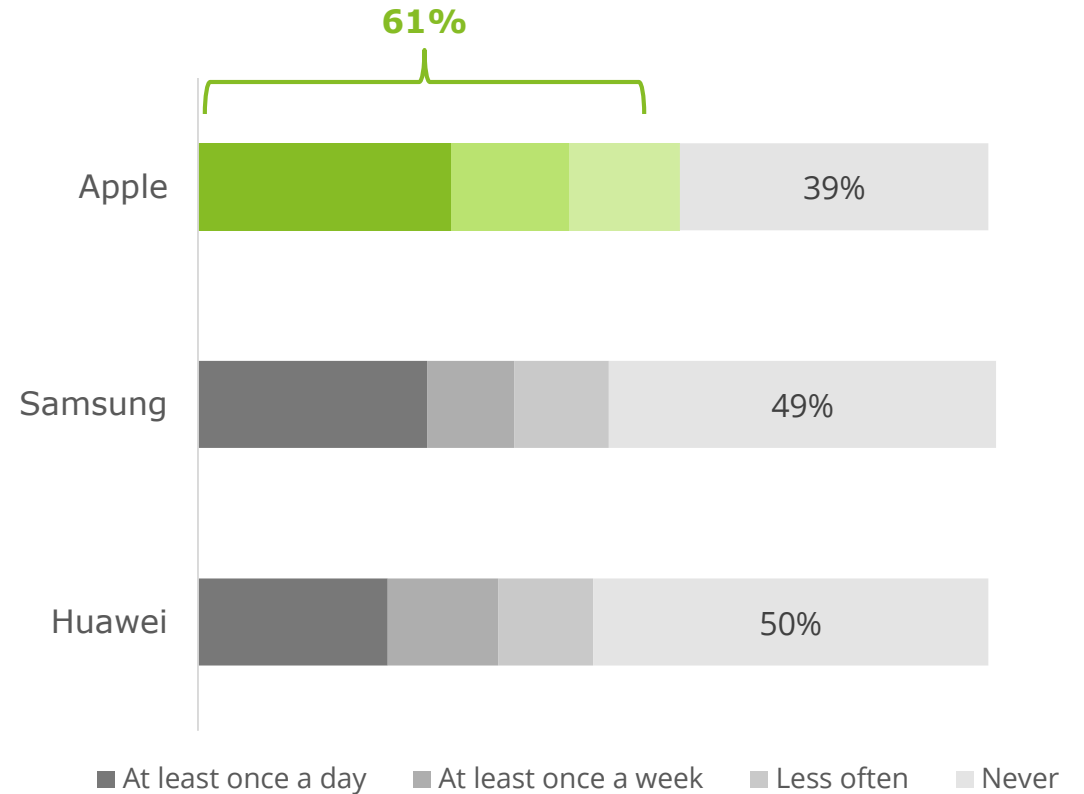
Do you use your mobile phone to play games?



47%



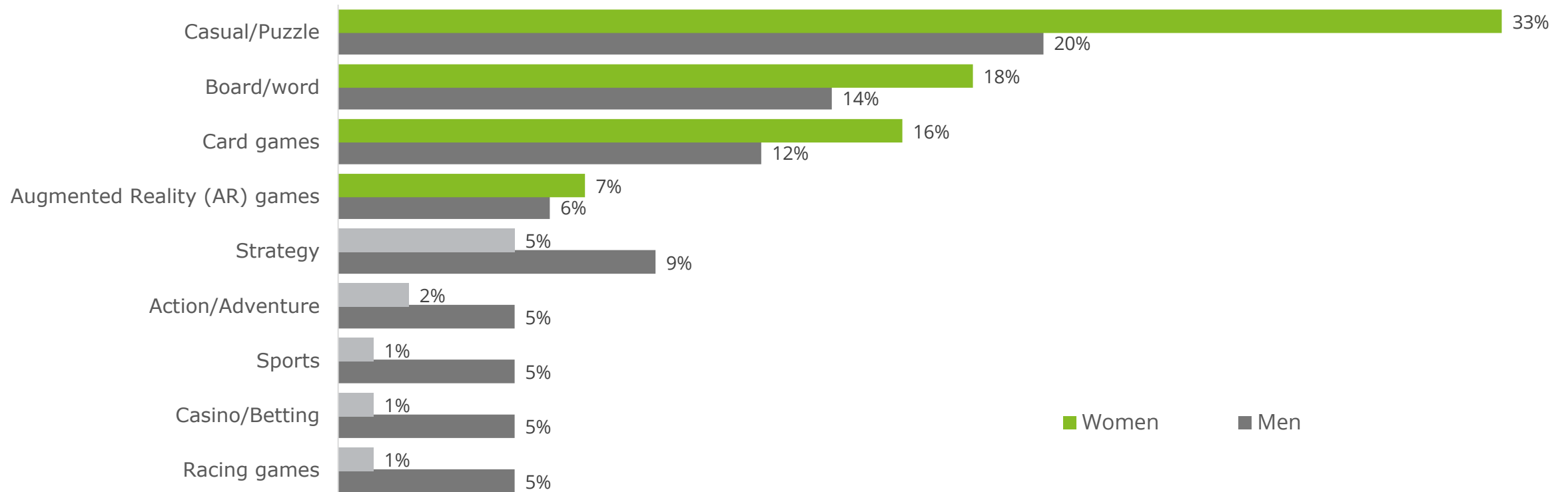
53%



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition
Weighted Base: All respondents owning a smartphone (NL edition: n=1860)

Women play casual, board, card and AR games more often while men play more strategy and action games

Which, if any, of the following types of games do you play on a smartphone?

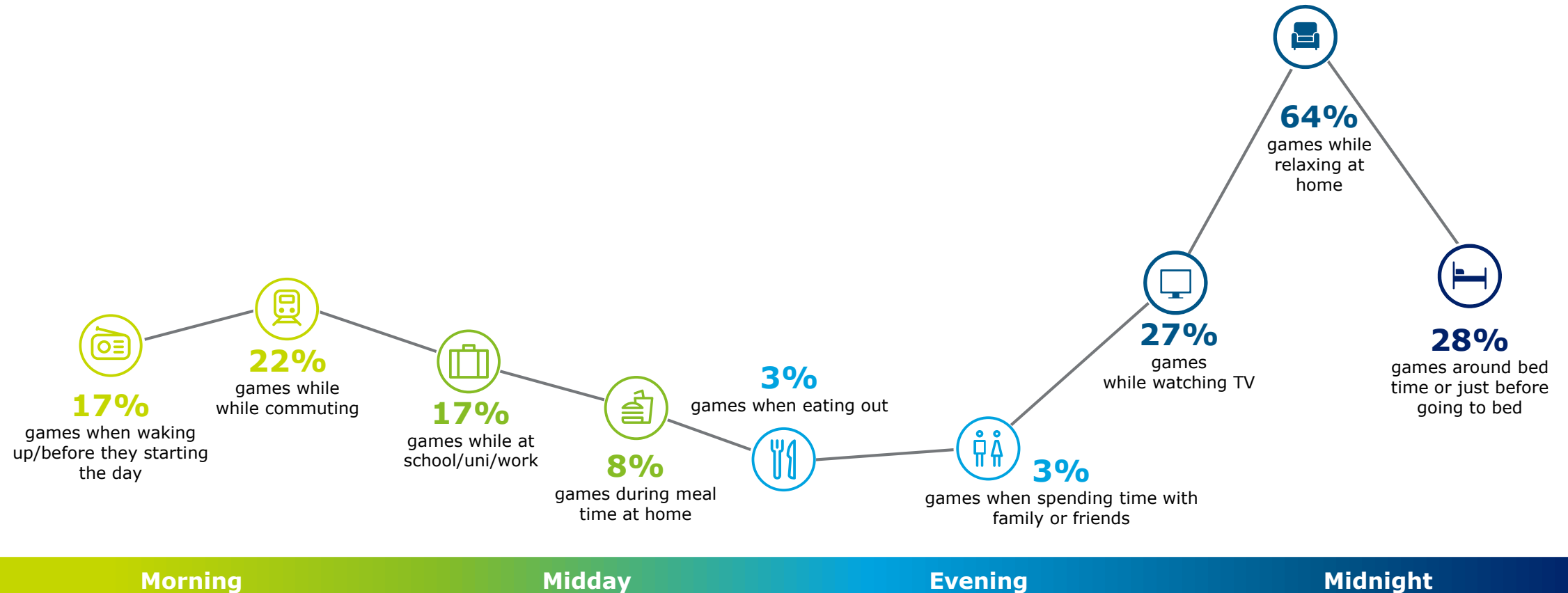


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents owning a smartphone (NL edition: n=1860)

Gaming is mostly an evening activity, and 28% of consumers play games just before going to bed

When do you tend to play games on your mobile phone?

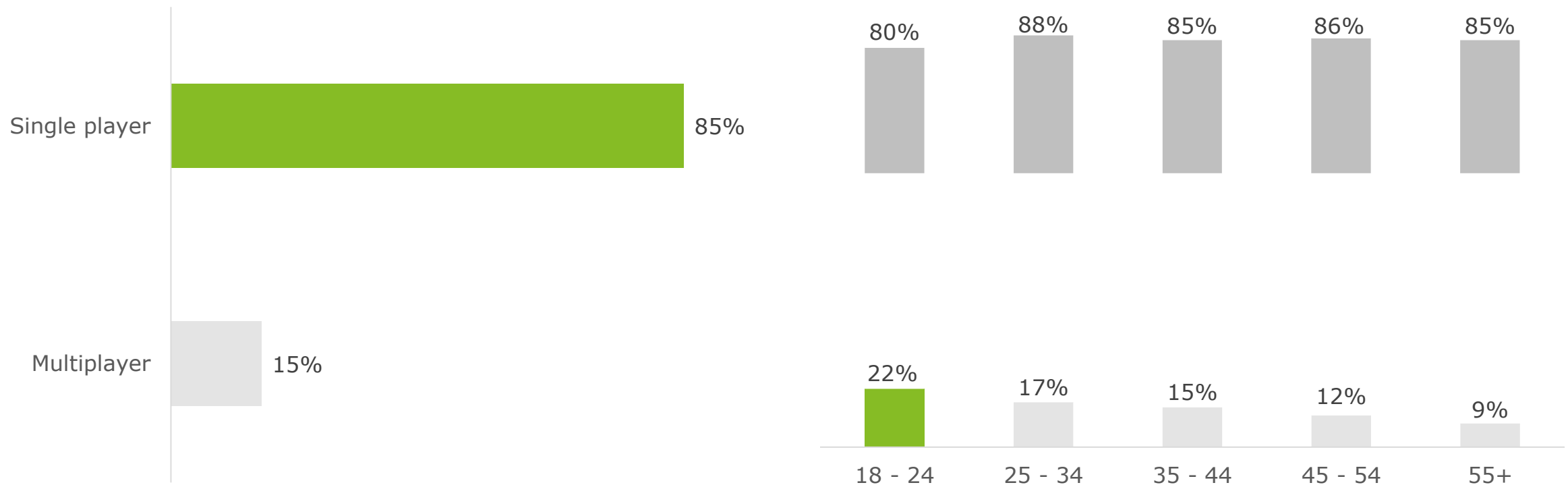


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents who play games on their smartphone (n=1000)

85% of smartphone gamers play single player games, younger age groups are more likely to play multiplayer games

Do you play single player or multiplayer games?

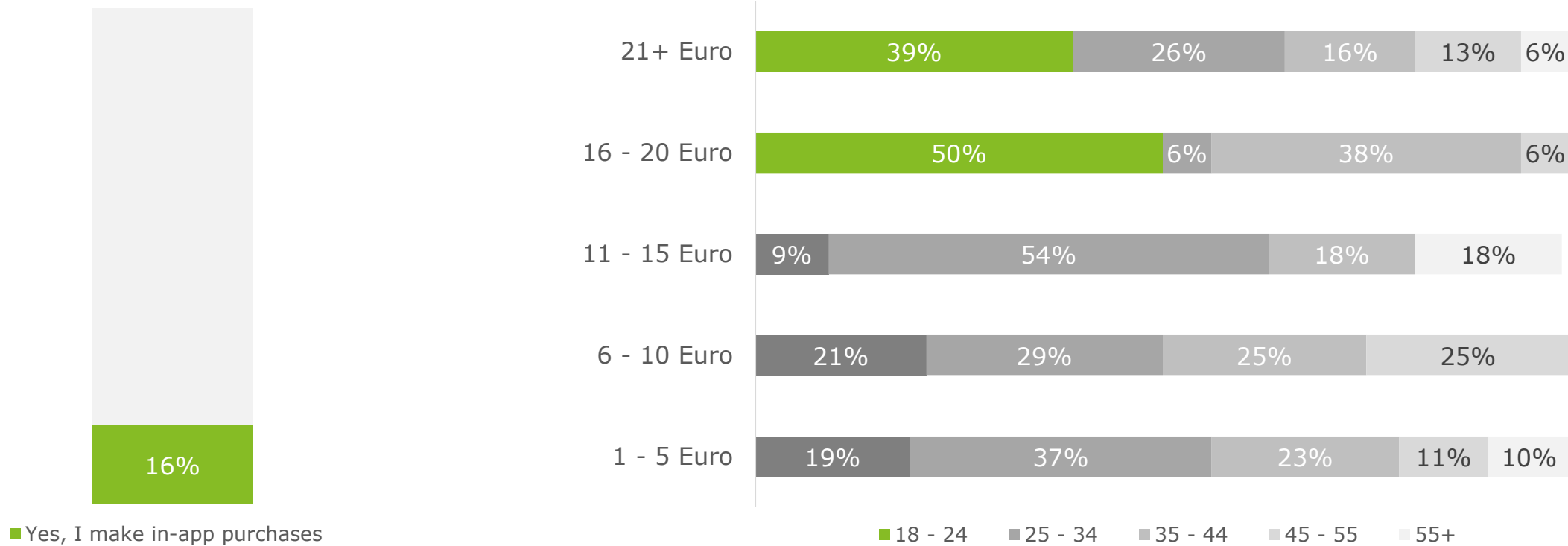


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents who play games on their smartphone (n=1000)

16% of the smartphone gamers make in-app purchases, youngsters spend higher amounts

Do you spend on in-app purchases for mobile games, and if so: how much each month?

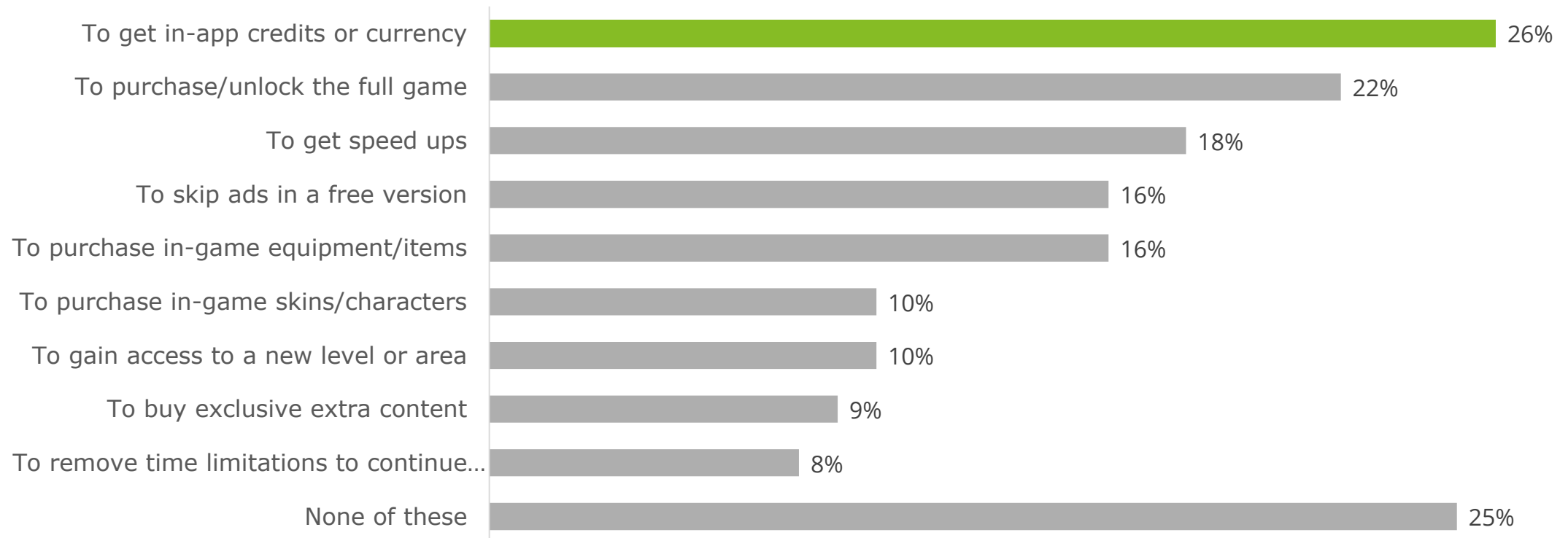


Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents who play games on their smartphone (n=1000)

Of the in-app gaming purchases, buying in-app credits is the most popular category

You mentioned that you have made an in-app gaming purchase(s). Which, if any, of the following have you purchased?



Source: Deloitte Global Mobile Consumer Survey 2019, NL edition

Weighted Base: All respondents who play games on their smartphone (n=1000)

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