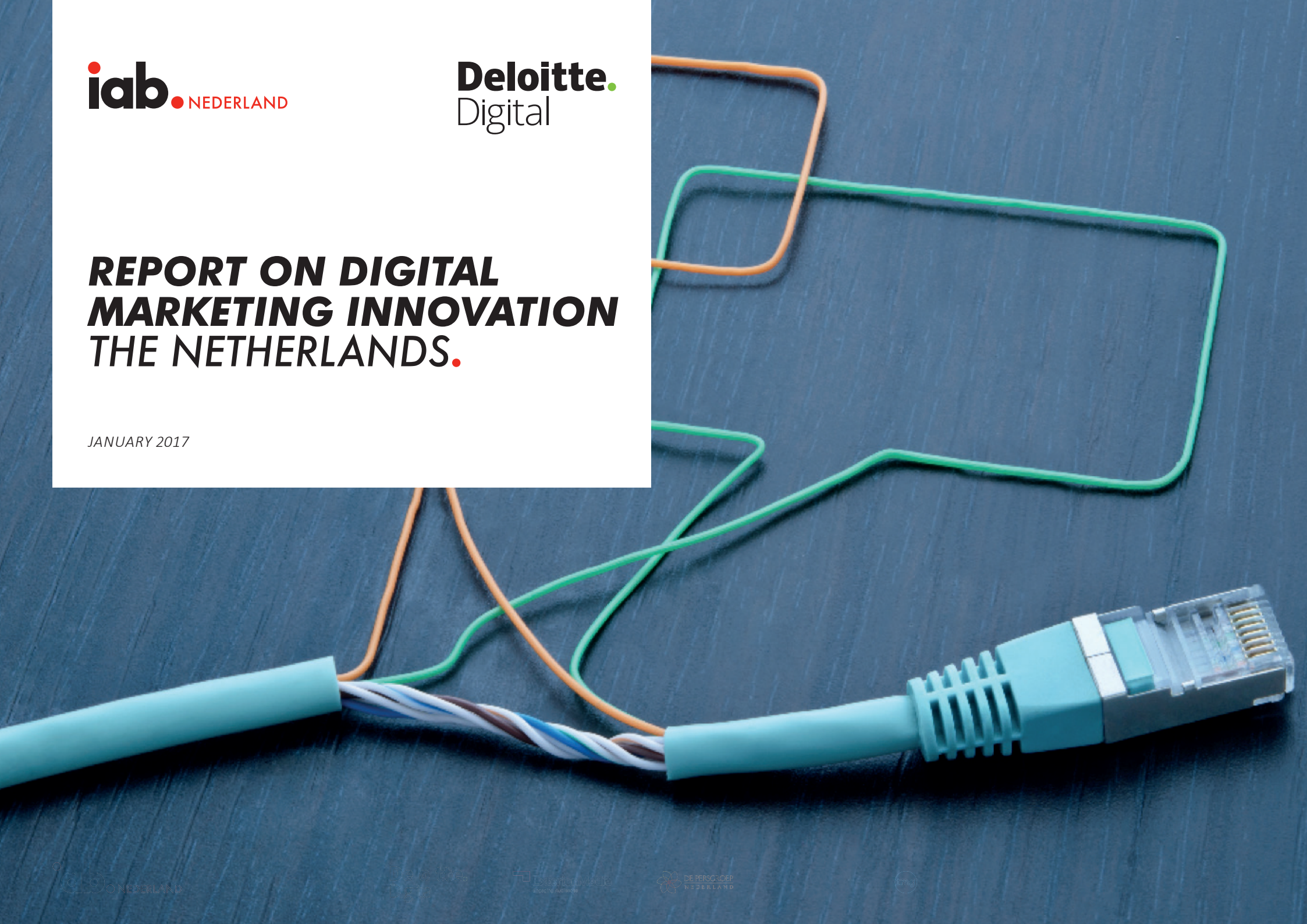


REPORT ON DIGITAL MARKETING INNOVATION THE NETHERLANDS.

JANUARY 2017



INTRODUCTION.

Welcome to our newest piece of research, the IAB Digital Marketing Innovation Research. We are proud to share it with you. With this survey, IAB Netherlands charts the digital innovation agenda of leading marketers in the Netherlands. In cooperation with Deloitte Digital we had interviews with 22 top marketers about the state of digital marketing in their organizations and we spoke about their expectations for the coming 3 years. The interviews were set up around three main themes; the use and organization of digital marketing, the role of data and technology, and the way to measure the results of digital marketing efforts. From the aggregated results we collected the main conclusions and put together this report.

TABLE OF CONTENTS.

<i>Introduction</i>	3
<i>Executive summary</i>	6
<i>Digital marketing: the status quo and expectations</i>	8
<i>Innovation linked with the data challenge</i>	12
<i>Potential barriers in driving digital marketing</i>	14
<i>Marketers' recommendations and appeals</i>	15
<i>Closing words</i>	16
<i>Respondents</i>	18
<i>References</i>	19
<i>Contacts</i>	20

“WE NOW USE ALGORITHMS AND INTELLIGENCE TO REMAIN RELEVANT TO OUR CLIENTS. DIGITAL IS COMPLETELY CHANGING OUR WAY OF WORKING AND WE WILL HEAVILY INVEST IN THIS AREA”.

DAAN NOORDELOOS, TRANSAVIA

EXECUTIVE SUMMARY.

Digital marketing has shown consistent growth figures in the past, and the expectation is that this trend continues; the respondents in our research expect that within the upcoming 3 years digital marketing budgets will increase by more than 20% (54% digital activities today, to 66% of the activities in three years). The question is whether or not all media including traditional media such as TV and radio are soon to be seen as 'digital' as well.

Mobile is a very important topic on the marketer's agenda. The exploration of added value of VR and AR is ongoing (although most companies have not yet found that value just yet). Video has shown tremendous growth figures and will take an even more important role in digital marketing in the coming years.

Digital transformation

Digital transformation is an important theme within the organizations we spoke to. The amount of data is growing every day and organizations are forced to invest in technology and marketing automation in order to remain relevant to their customers. The offer is incredible: the growth of marketing related tooling has exploded. The challenge here is to make the right choice on what investments will be made to stay agile enough in terms of people, technology and knowledge.

Marketers believe in data as enabler of the next step in marketing; 74% of the respondents expect to be able to drive one-to-one marketing within three years and organizations are preparing for

it right now. Technology solutions such as Data Management Platforms (DMP's) are on their way to becoming mainstream (36% has implemented a DMP, 55% is currently implementing one).

But although all respondents underline the central role of data within marketing, 27% does not have a data strategy implemented yet.

With the explosion of data, and current marketing automation projects in all organizations, marketing and IT departments find new ways to collaborate in order to generate more speed and create more value from data.

Another trend is that the buying of media and the execution of media activities is more and more organized in-house. The increasing need to take control of your own data and processes and the lack of transparency of third parties both seem to drive this change.

Data related challenges

Data is the new oil, many marketers declare. Distilling the value from data, however, is a large challenge. Respondents say to face many difficulties in processing their data. These difficulties are caused by technical restrictions (data quality, 35%, connecting data sources, 45%) as well as remaining relevant and actionable (25%) and handling privacy related issues (35%). Generating insights is one of the largest challenges for 35% of the respondents. Extracting valuable insights from data is challenging due to lack of knowledge and skills; a marketer is not primarily capable to perform in-depth data analysis. On the other hand, it cannot be expected either from a data analyst to craft the valuable and relevant marketing related data questions.

Being in the possession of these volumes of data comes with responsibility: most respondents say that data protection and privacy and compliance related issues are top of mind. Additionally marketers struggle with the ethical dilemma: how

far do you want to go? Marketers are afraid of the changing mindset of customers, and the possibility that they will no longer want to share their data. Furthermore, the amount of data and the ability to measure touchpoints does not necessarily simplify the measurement of success. 67% of the respondents say that they are not able to measure the ROI of their marketing investments over their channels. There is a lack of coherence due to the variety of metrics, which results in a complex and cloudy KPI landscape.

Closing words

The goal of marketing has not changed by the digital revolution: in the end it's still about being relevant to your customers. The challenge however has shifted to the organization: the velocity of change and development within the digital marketing landscape forces companies to create an insight driven organization that is nimble and agile in execution.

DIGITAL MARKETING: THE STATUS QUO AND EXPECTATIONS.

For years, digital marketing has shown strong growth figures. We asked topmarketers in the Netherlands to share their opinion on the current situation and their expectations in 3 years' time. What is the current situation in the Netherlands and what do marketers expect?

Digital growth continues: expectation of 20% growth in the coming 3 years

Digital marketing has grown, year-on-year. The respondents of the current study expect a 20% growth in digital marketing spend; digital holds 54% of their marketing mix today and is expected to grow towards 66% in the coming three years. However, the distinction between traditional offline and digital is blurring. Most respondents indicate that they have an "AV" category that includes both traditional linear TV commercials as well as digital video and radio. In December 2016 RTL claimed to be the first company to successfully execute digital product placement². Marketers question what exactly will be defined as digital, and whether or not all media will be digital in the end.

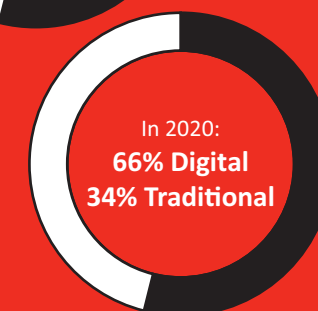
Marketing is seen as growth driver, investments continue to rise

Together with the growth in digital marketing, the marketing department itself and the role of the marketer is changing; expectations of its role are shifting from crafting brands to becoming an indispensable pillar of growth and innovation. A recent global study jointly executed by the CMO Council and Deloitte³ reveals the expectations of marketing being a growth driver among senior management and the board.

Investments are growing accordingly and year-on-year marketing budgets are rising. International research shows that 12% of the entire company budget is spent on marketing⁴. Gartner researched that 27% of the CMO spend is technology related, and additionally they predict that the CMO marketing spend on technology will exceed the overall CIO technology spend in 2017⁵. The respondents to this study all confirm they are investing heavily in marketing innovations and technological solutions that further automate marketing activities.

***"Innovation is part of our DNA;
if someone has an idea that will
benefit the business, they get a
budget, no questions asked"***

Marco Disseldorp, Adobe



Note: TV is added up to traditional media in the current metrics. Marketers do expect TV to be seen as a digital channel in the near future.

Digital transformation at all organizations

Being on top of mind of the customer becomes an ever increasing challenge with the increasing number of channels and touchpoints. Data is scattered across the organization and not all potential value can be uncovered. Going through a digital transformation is inevitable: all of the respondents are either transforming towards a digital organization, or can be qualified already as pure digital player. Attached to this digitization, the respondents mentioned that their relations with the IT department are becoming closer. Though rarely leading, IT is involved earlier in the innovation process and several of the respondents say to apply the agile or DevOps ways of working in order to accelerate.

The increasing volume of data and the urge to stay relevant to customers drives organizations to invest in optimizing their data usage as well. 27% of the respondents however, has no data strategy in place. They are far from the 33% of the respondents that have a separate data department in charge of their data strategy. The other 40% have a data strategy owned by the marketing department.

Channel integration becomes mainstream: 48% of the respondents declare to have their channels fully integrated and cross channel optimized. Only 14% says that they currently still manage their channels completely separately, but all respondents are working on increasing the percentage of optimally optimized organizations. The transformation continues, and 74% of the respondents expects to be able to have one-to-one marketing established within the next three years.

“We’re investing in marketing attribution technology to be able to make better budget allocation decisions in the future”

Edwin Hof, TUI

Hot topics in digital marketing

Mobile conversion still a challenge

Since the consumer is spending more and more time on mobile devices, mobile is an important topic on the marketer's agenda. Despite the wish for large sales conversion growth over mobile channels, the respondents confirm that customers do seem to browse and orientate on mobile devices, but larger purchases do not yet take place on mobile as much as wanted. Customers still tend to buy larger basket sizes and complex products and services on desktop. Some respondents indicated the difficulties on the creative side, where campaigns sometimes are started in a "traditional way", not taking mobile as a starting point, resulting in lack of user experience or extra costs for additional shooting (for video) or development.

Pokémon Go has not triggered large AR or VR investments just yet

Many of the respondents are interested in AR and VR and have started experiments to uncover the

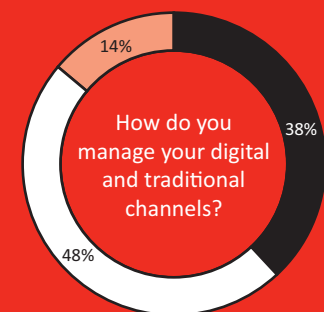
added value, but large investments do not yet take place. Despite entertainment or simulation purposes, respondents don't expect their customers to walk around wearing Oculus Rift or Cardboard 3D headsets any time soon. VR might bring added value in experience related event activations, but, one exception noted, a clear link to sales has not been discovered so far.

Video is on the rise, SEO and SEA remain a large part of the budget

As in other studies that show accelerating revenue growth in video (+28% in 2015¹), 70% of the respondents expect a strong growth in video in the coming years, and they allocate their budgets accordingly. They expect customers to consume many types of engagement through video, which might make written instructions less important. Additionally, SEO and SEA currently are, and will remain, a large part of the marketer's budget. Respondents confirm the need to buy the top positions on search engines in certain phases of the customer journey.

"I believe that our inhouse SEO & SEA teams belong to the top performers in the Netherlands and Belgium, partially due to the clever connections with our daily business"

Jeroen Sitskoorn, Bol.com



Fully integrated: 48%

Digital and traditional marketing where all processes are optimized

Partially integrated: 38%

Digital and traditional marketing integrated but not optimized cross-channel

Separated: 14%

Use and optimization of digital media is managed separately from traditional media

Digital innovation drives focus from acquisition to retention

While current activities are mostly aimed at the acquisition of new customers, marketers indicate that retention of clients is becoming more and more important. Today, acquisition wins easily, scoring over 54% of the potential investment, opposed to 28% of the budget being allocated to retention. In three years, marketers expect to invest 39% in retention; a growth of 11 points while acquisition declines with 14 points to 40%.

There seems to be an exception for financial services. There, the focus is already mainly on retention. Marketers in this industry either expect this to remain the same, or expect acquisition to become more important in the near future.

Control seems to be the trend: organizations are in-housing capabilities

The role of agencies and media buying houses is changing. Whereas marketing related activities and specialisms were outsourced more easily in the past, there seems to be an in-housing trend

that drives organizations to develop their own capabilities. The increasing urge to take control and the lack of transparency at third parties both seem to drive this change: 75% of the respondents declare that third parties are not transparent about their margins and an equal percentage sees this as a serious issue.

Today, the respondents say that they execute 55% of their marketing activities in-house. The latter is expected to grow towards 63% in three years. There is, however, no clear answer to whether the benefits of this movement will outweigh the lack of flexibility in capabilities.

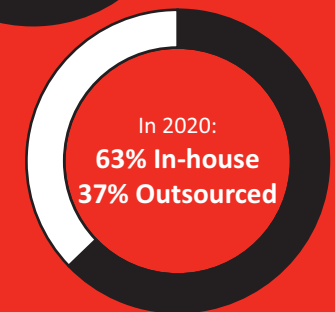
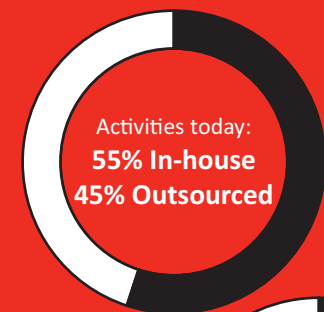
Keeping focus on a few core activities, as well as the expectation of higher quality delivery at the third party, are reasons to outsource media activities.

“We have our employees seated at the third party site for a truly joint effort and simultaneously we build capabilities together”

Harry Dekker, Unilever

“The skills and amount of effort required for digital marketing specialisms are tremendous. We work with strategic partners in order to deliver the right quality”

Peter Haug, BMW



“In-house capabilities can increase speed, but focusing too much on your own models might result in competitors passing you by

Bas van de Bunt, Nederlandse Loterij

INNOVATION LINKED WITH THE DATA CHALLENGE.

The offer of marketing tools has exploded: Chiefmartech's visualization of marketing technology solutions⁶ is a bellwether showing over 3.500 unique tools today. That is, in comparison to 2015, a stunning growth of 87%. Is the Dutch marketing innovation adoption growing accordingly?

The Dutch are ahead of the curve

Compared to international trends, the Dutch marketing industry seems to be ahead of the curve: 91% of the respondents declares that a DMP is either a reality within their company (36%) or they're currently implementing one (55%), while according to Gartner, DMPs are expected to become mainstream within 2-5 years⁷. The same applies to Data Driven Marketing, which seems to be the norm within the Netherlands (82% of the respondents makes at least some use of marketing in a data driven fashion), while the expectation in international studies is that, globally, this will be the case in 5-10 years.

DMP is taking over CRM

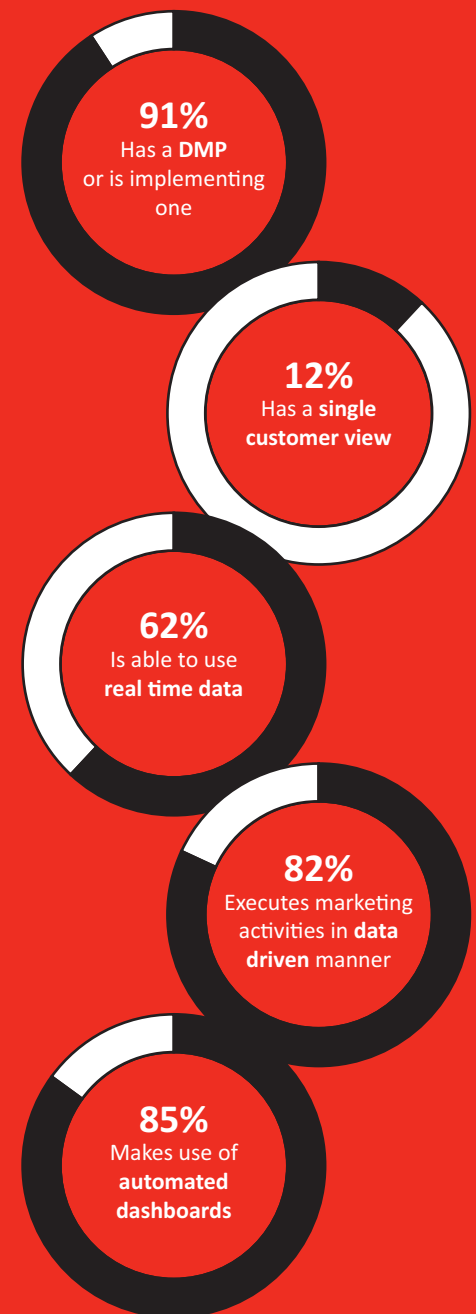
Whereas some organizations still see CRM as the heart of the organization, most organizations see CRM as 'just another data source'. The DMP (Data Management Platform) becomes the one-to-one marketing enabler. Creating a single customer view, however, remains difficult; it is available at only 12% of the respondents' organizations. This is mostly due to data being stored in many different systems across the organization, which causes related challenges. Data needs to be accurate, consistent and complete in order to draw the right conclusions.

Real-time data usage comes with challenges

To enhance relevancy, for example by optimizing the customer experience or marketing offer based on real-time behavior at a specific touchpoint, real-time data usage becomes increasingly important. 62% of the respondents say they are able to use real time data in their marketing efforts. This does add an additional layer of complexity as often real-time data is not readily available, and for instance content variations need to be produced upfront to be able to act upon the latest insights straight away.

Automated dashboards drive strategic decisions

Dashboards become increasingly important in the decision making processes. They combine data from various inputs (e.g. financial drivers and website metrics) to illuminate insights. 85% of the respondents declare that they have access to an automated dashboard.



“Data analysts are not marketers, and therefore you can’t expect them to come up with the valuable and relevant marketing related questions”

Maarten Korz, Rabobank

“Privacy compliance is a non-negotiable requirement for us”

Albert Spijkman, Achmea

Getting value from data: 5 main data challenges for marketers

Although deep data insight is seen as crucial for modern marketing, the opportunity seems to be as large as the challenge to uncover its value. Marketers struggle while handling data and face 5 main challenges that stem their road to success.



There’s a strong need for capabilities that close the gap between marketing and data analytics

Crafting insights is difficult. Data analysis is not inherently part of the marketer’s traditional skillset. Data analysts on the other hand are not educated as marketers. The challenge, and opportunity at the same time for further acceleration of digital growth is in bringing both worlds closer together and attracting people with the specific skills to bridge that gap.



Quality becomes the bottleneck

Data is available in large amounts and in many formats, but often the quality of the available data differs. To clean ‘dirty’ data is a very time consuming activity. This is a widely known problem, resulting in data becoming the bottleneck rather than the opportunity.



Connecting data sources

Data is scattered over multiple sources throughout the organization and the challenge is in connecting them. Adding external data to the datapool makes the challenge even more complicated. Organizations are facing a lack of uniformity in definitions, both internally and externally. Technology solutions such as a DMP can accelerate the data opportunity, but the uniformity challenge remains.



Actionability & relevancy

When insights are generated it becomes a challenge to translate them into relevant actions. Marketers acknowledge that relevancy is the most important

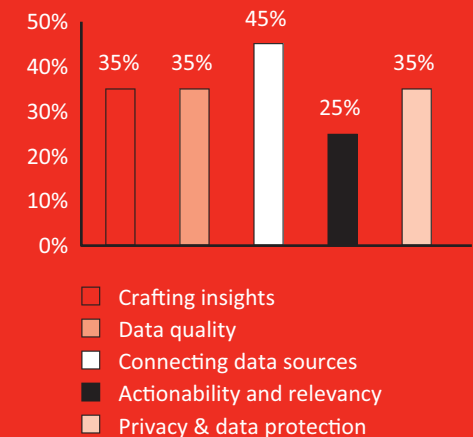
factor in their marketing activities and real-time actionable insights become key in the execution of spreading their message at the right time through the right channel. However, the lifetime of data (“which like food, is limited”) and the (lack of) speed of internal processes can become a bottleneck.



Data protection is a must

Marketers stress the need to be compliant with privacy regulation and in most cases this topic is non-negotiable. Data protection is an absolute must as organizations realize very well that they cannot afford any mistakes in protecting their customer data. Current compliance processes can, however, result in restrictions and lack of speed. Many decisions need to pass various departments and agility in scaling up and testing is troublesome; a challenge faced in many data related activities.

Percentage of respondents that mentioned data related challenge



POTENTIAL BARRIERS IN DRIVING DIGITAL MARKETING.

The way forward in digital marketing is not a clear paved way and does not occur overnight. What do marketers face on their road to digital mastery?

Data protection, compliance and intrusiveness: conservatism is the way to go

Possessing large amounts of data comes with responsibility and it is on top of the marketers' minds. From an ethical perspective marketers wonder: where do you draw the line? This question triggers the discussion about the thin line between service and intrusiveness. 74% of the respondents say to act rather conservatively when it comes to using customer data for marketing purposes.

Innovative KPIs have not yet reached the boardroom, ROI difficult to measure

Marketers have more choice than ever when it comes to measuring their customers' moves. In the end, it's the financials that matter: revenue has been mentioned as the most dominant KPI in steering marketing activities. Another KPI that was

mentioned many times is Market Share, followed by Conversion.

The amount of data and the ability to measure touchpoints does not necessarily simplify the measurement of success. 67% of the respondents say that they are not able to measure their ROI over their channels. The lack of coherence makes it difficult to manage the business through the newer KPIs and the variety of metrics results in a complex and unclear KPI landscape. The respondents expect to be able to monitor the attribution of channels and activities to deal closing in the near future, but there's work to be done. Respondents declare that many of the revenue attribution models are currently insufficient. Until that day most of the higher management will stick with the familiar KPIs: revenue is still the main metric in the boardroom.

Lack of agility is a continuous fear

As multiple new digital innovations are released every day it has become impossible to keep up. And investing now might as well result in creating

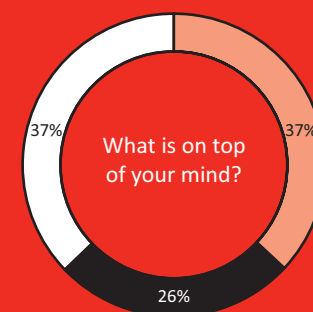
the new legacy of the future. So what to invest in, and when, is a question that is top of mind within the fast changing world of digital marketing. The tension between innovation and agility is widely recognized among marketers.

“New media tools are released every day. The industry has become extremely complex, so you need a smart and broad network to keep up with developments”

Djémilah Dalhuisen, ING

“We can learn a lot from young digital companies in how they adopt and benefit from new technologies”

Jim van Velzen, Schiphol



Agility: 37%

Digital innovations: how can we keep up and remain agile at the same time?

Data protection: 26%

How can we ensure our customer's privacy is well maintained and their data is safe?

Other 37%

Topics mentioned are Relevancy, sense of urgency within organisations and siloed organization

MARKETERS' RECOMMENDATIONS AND APPEALS.

Together, we bring our discipline a step further. What do marketing professionals recommend or ask their peers?

Stop making long term marketing plans

"We've stopped working with long term marketing plans altogether. In the past, our marketing plans lost their value within 3 months, due to market changes. It's better to become a real time data driven business".

Martin de Boer, Corendon

Just start

"Marketers are afraid to just start. There's simply too much to look at. Even though it is difficult, my advice would be: just pick up a challenge and start"

Daan Noordeloos, Transavia

Let's unify our metrics

"Industry data doesn't yet come in as a widely accepted market currency. There is a lot of value in unifying the fundamental marketing and media data. As advertisers we want to be competitive and tend to be very protective with respect to our data pools and strategies. However, the risk is to forget about potential synergies and what we might have in common. My call to the market is; let's show leadership in this chaos and create common datasets for the industry as a base, rather than each individual company creating their own. From there on individual advertisers should have the opportunity to build on this base adding their own, specific and unique data. This will drive both efficiency and effectiveness"

Harry Dekker, Unilever

One common logo for influencer marketing

"It would be a big opportunity for Influencer Marketing when all advertisers start using 1 common logo to indicate if a blog/vlog is sponsored. This will enable transparency and ease of recognition. My belief is that honesty will be appreciated by consumers."

Charlotte Zelders, Pepsico

Let go of old-fashioned marketing priorities

"Marketers still prioritize large thrilling campaigns and other old-fashioned 'coolness' over customer relevancy. There can be so much more value in well targeted, smaller, high-impact activities"

Maarten Korz, Rabobank

"Transparency in using (customer) data is still an issue with third parties. The lack of it can be destructive to our industry"

Paul van Breugel, Travix

CLOSING WORDS.

This is the first IAB Digital Marketing Innovation Research report. Top marketers of leading companies have told us where they stand today and what areas of innovation they feel are most important to invest in. The group wasn't scientifically weighted to accurately reflect the entire market, yet the group is large and diverse enough to clearly indicate which (digital) trends will dominate the market in the coming years.

Where are we now?

Today, the marketer spends approximately half of his media budget on online media, but by 2020 that will be closer to two-thirds. The deployment of digital channels is increasingly part of an integrated marketing plan, which stretches far beyond just the media aspect. Today, an ad is no longer a picture, but an application that opens connections to database and video servers and DMPs, to ultimately connect to, and build a relationship with the customer. This requires a new set of capabilities.

Core responsibilities and conditions for success

For the CMO of the future, knowledge of the digital world is a key condition for success. The chief technology officer (CTO) can help along the way, but is only very rarely leading in thinking about marketing innovation. That is unfortunate, because some of the new opportunities to reach customers are really driven by advances in technology. However, in the large majority of cases it is the marketer who has to follow up on these developments and identify technology-driven opportunities. Thinking in silos no longer works. Knowledge of the marketing technology stack, formulating a data strategy, partnering with the CTO, managing a group of digital specialists, externally or in-house: it's all part of the responsibilities of the CMO today.

One-to-one digital marketing relationship is possible

One thing is clear: almost all those interviewed are looking to build a better, long-term relationship with the customer. In digital marketing innovation these marketers see the opportunity to establish

customer intimacy, or even a true one-to-one relationship. Obviously, data is key. With the right use of data a deep understanding of individual customers can become attainable.

At the same time, the vast majority of marketers are very conservative in the way they deal with sensitive information. And rightly so; nobody wants to offend or even scare his customers. A sophisticated data strategy and granular consumer insight enable a marketing strategy where consumers see less irrelevant ads and get better service. What's not to like?

Translation of Digital Marketing Innovation research to IAB Netherlands policy

IAB Netherlands will do this research annually to remain connected to the digital marketing innovation agenda of leading organizations in the Netherlands. Like the organizations we spoke with, the IAB itself is in the middle of a technology driven transition. As digital communication evolves, we are broadening our scope, changing from a digital advertising to a marketing innovation association.

Technology and data will remain important topics for the IAB, which is reflected in the fact that we have appointed board members representing these fields. To help drive this agenda, we will share inspiring examples of technology and data driven digital innovation at our member meetings and conferences.

Consumer interest is another important topic for IAB, guiding how we position ourselves and advise our members. Recently IAB has stood up for a balanced cookie legislation, taking into account the position of the consumer as well as the industry. Last year we started a dialogue with consumers to learn why ad-blocking became more popular, and used the response to deliver guidelines to the market that address these consumer issues. As data strategies evolve, we will remain vigilant on key privacy issues which may come up. And as marketing becomes more technology and data driven, the IAB strategy is focused on maintaining quality and durability as key principles in consumer relations. Thanks to our Agile Task Forces we are able to respond to the

needs of the market from a position of in-depth knowledge. Practice what you preach.

Like the organizations we spoke with, the IAB itself is in the middle of a technology driven transition. As digital communication evolves, we are broadening our scope, changing from a digital advertising to a marketing innovation association. Technology and data will remain important topics for the IAB, which is reflected in the fact that we have appointed board members representing these fields. To help drive this agenda, we will share inspiring examples of technology and data driven digital innovation at our member meetings and conferences.

Consumer interest is another important topic for IAB, guiding how we position ourselves and advise our members. Recently IAB has stood up for a balanced cookie legislation, taking into account the position of the consumer as well as the industry. Last year we started a dialogue with consumers to learn why adblocking became more popular, and used the response to deliver

guidelines to the market that address these consumer issues. As data strategies evolve, we will remain vigilant on key privacy issues which may come up. Thanks to our Agile Task Forces we are able to respond to the needs of the market from a position of in-depth knowledge.



Nathalie Peters

Chairman of IAB Netherlands

RESPONDENTS.

Achmea Albert Spijkman

Adobe Marco Disseldorp

AdfoGroep Job Scheepers

BMW Peter Haug

Bol.com Jeroen Sitskoorn

Corendon Martin de Boer

ING Djémilah Dalhuisen

KPN Erik de Jong

Media Markt Marieke van Heeswijk

Nederlandse Loterij Bas van de Bunt

Nestlé Valerie van Willigen

NS Mascha van der Heijden

PepsiCo Charlotte Zelders

PLUS Ralf Kroon

Rabobank Maarten Korz

Schiphol Jim van Velzen

T-Mobile Randy van Essen

Transavia Daan Noordeloos

Travix Paul van Breugel

TUI Edwin Hof

Unilever Harry Dekker

ZenithOptimedia Bojan Stigter

REFERENCES.

1. IAB Netherlands, "Report on Online Advertising Spend 2015", <https://iab.nl/kennisbank/digitale-advertentiemarkt-tien-jaar-vertienvoudigd-naar-15-miljard-euro/>, 30/03/2016
2. Emerge, "RTL claimt primeur met digital product placement", <http://www.emerge.nl/nieuws/rtl-claimt-primeur-digital-product-placement>, 06/12/2016
3. CMO Council & Deloitte, "The CMO Shift to gaining business lift", <https://cmo.deloitte.com/xc/en/pages/.../the-cmo-shift-to-gaining-business-lift.html>, 12/2016
4. Deloitte, "CMO Survey February 2016" <https://cmo.deloitte.com/xc/en/pages/solutions/cmossurvey.htm>
5. Gartner, "CMO Spend Study 2016 - 2017", <https://www.gartner.com/doc/3489617/cmo-spend-survey--budgets>, 24/10/2016
6. Chiefmartec, "Marketing Technology Landscape Supergraphic 2016", <http://chiefmartec.com/2016/03/marketing-technology-landscape-supergraphic-2016/>, 21/03/2016
7. Gartner, "Hype Cycle for Digital Marketing & Advertising 2016", <http://www.gartner.com/newsroom/id/3502017>, 03/11/2016

CONTACTS.

Jeroen Verkroost

IAB Nederland

+31 (0)85 401 0802

jeroen@iab.nl

Nathalie La Verge

Deloitte | TMT

+31 (0)6 2336 7886

nlaverge@deloitte.nl

Frederique Oudkerk

Deloitte | Deloitte Digital

+31 (0)6 2305 6342

foudkerk@deloitte.nl