

Research Trends in Internet Use 2014



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1. Introduction

SIDN, .nl and internet use

As registry for the .nl domain, SIDN is responsible for the domain's functional stability and development on the internet. We perform that role in association with more than 1,500 .nl registrars. We register .nl domain names – of which there are now more than 5.5 million – and ensure that they are reachable. Every day, more than a billion search queries are processed for users as they visit websites and exchange e-mail. For SIDN and its registrars, current and future developments in internet use are therefore very important.

Previous research

SIDN invests a great deal in research into internet use in the Netherlands. In 2012, we were the first organisation in the world to investigate the relationship between how people use the internet and the demand for domain names. The resulting study report shed light on the role that new devices and social media were playing in that relationship. At the end of 2013, SIDN published an update to the previous year's study report, reflecting the views of a panel of experts who were asked to comment on the trends highlighted by the survey.

Studies well received; subject remains topical

Both studies were well received. The audience was pleased that SIDN was looking beyond the domain name market itself. Many commentators recognise that trends in internet use are decisive for the future of the market. Furthermore, the subject is as relevant today as ever: the influence of new devices and social media continues to grow. As an expert in the field of domain names, we have therefore conducted a new survey and updated our report.

Primary research question unchanged

The central question addressed by the research remains: What changes can we discern in the way that people use the internet, and what do those changes imply for the significance of and the demand for domain names? The subordinate questions – such as what devices do people use to access the internet – were also as considered in the 2012 study.

Contents

The results of our study are of potential interest to a wide audience. The report deals with internet use on a variety of devices, and with changes in navigation preferences in the various age groups. Last but not least, it considers the position of .nl domain names.

2. Methodology and design

New methodology: panel data

In recent years, the scope for passively monitoring consumer behaviour has increased considerably. Special software can provide us with insight into how people use the internet on the various devices that they have. As a result, we can distinguish between use of laptops, PCs, tablets and smartphones. Consequently, we no longer need to ask people how they use the internet; we can simply measure their actual use on each device. For this study, we teamed up with the research agency GfK. All the data gathered from GfK's Media Efficiency Panel over a period of eight months – more than 43 million records per month – has been included in our analysis.

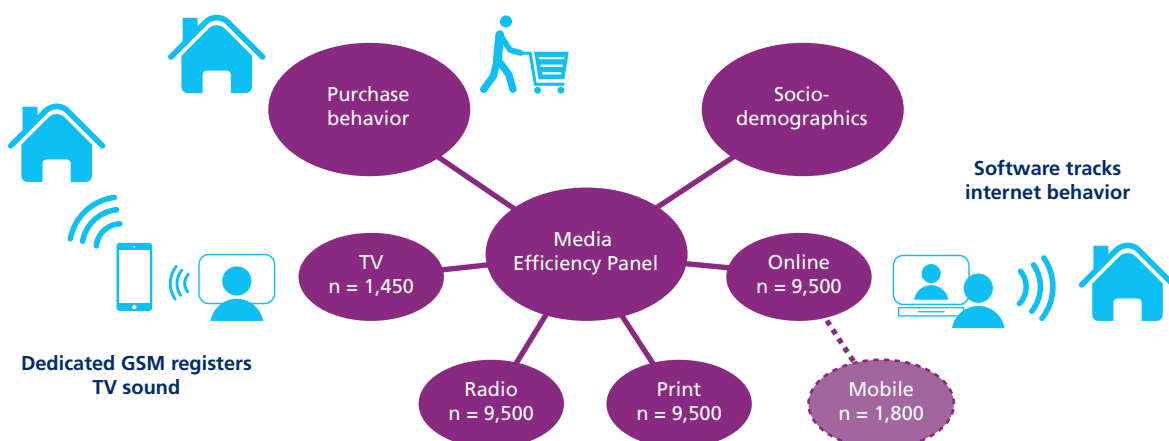
Surveys and expert panel

As well as analysing passive data, GfK undertook questionnaire-based surveys of business market decision-makers and consumers. Subject: their attitude towards internet use in general and domain names in particular. The results of the surveys, plus the analysed panel data, were presented to an expert panel for comment on 12 November 2014. The expert panel's views are summarised at the end of this report.

Report structure

This report describes the main results of the entire study. We first consider how internet users in the Netherlands spend their time online. What devices do they use, what are the implications for their internet behaviour and how is their behaviour changing? We then zoom in on users' on-line navigation behaviour. What role do apps and websites play, and what is Google's role? Finally, we address the significance of the identified trends for the development of the domain name market. How do users view domain names, in particular .nl domain names?

Figure 1: overview of GfK Media Efficiency Panel

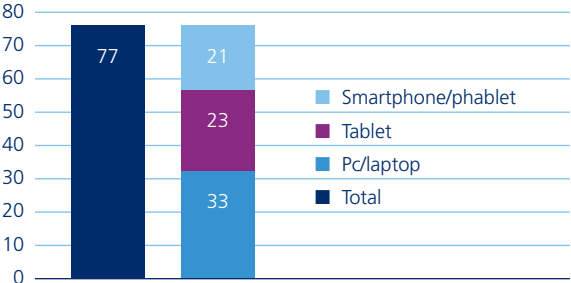


3. Time spent online using various devices

Use in hours

The average person with a PC, tablet and smartphone is active online for 77 hours a month, using browsers and apps, excluding internet use at work. To consider how respondents use the internet, we have zoomed in on the three main categories of device: PC or laptop, tablet and smartphone.

Figure 2: internet use by people with PC, tablet and smartphone in hours per month



Screen size influences usage duration

In 2014, the PC or laptop was the main device used for longer site visits, e-commerce and comparable transactions. Panel monitoring data show that a PC user goes online with a browser only 51 times a month, whereas the figure for a smartphone user is 137 times. However, on a smartphone the average browser session duration is just one minute, compared with roughly half an hour on the PC. The tablet is between the two, with an average session duration of two to three minutes. In practical terms, a smartphone or tablet user visits a relatively large number of websites for short periods. Tablet and phablet users visit nearly as many sites as PC users, although the average browser session is much longer in the latter group.

More devices, more use

Users who have a tablet, smartphone and a PC or laptop do not spend less time at their PCs, but more. The number of hours spent online using mobile devices is also higher. However, the tablet browser sessions of people who have all three the devices are relatively short, while their PC sessions are relatively long.

Different devices, different usage patterns

Whereas until five years ago the PC was the dominant internet access device, an increasing number of users now also have a smartphone and tablet. People have clear usage preferences for each type of device. Tablets are used for quite long periods for gaming, while smartphones are used for social media. The PC is the preferred device for on-line shopping.

Figure 3a: use of devices (duration)

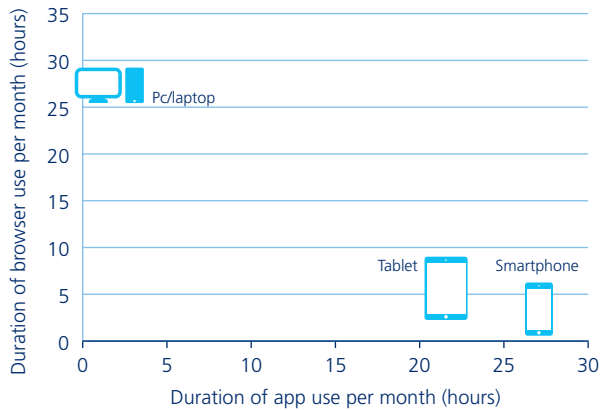


Figure 3b: use of devices (number of unique apps/domain names)

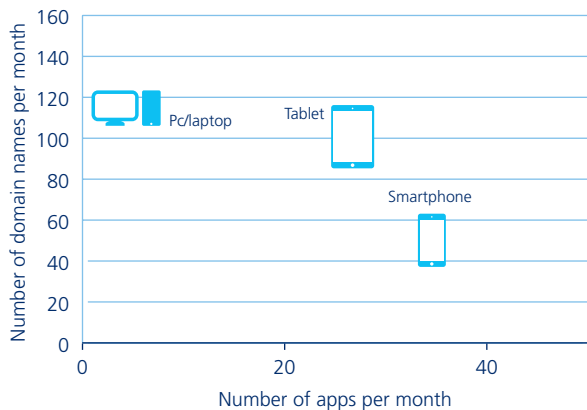
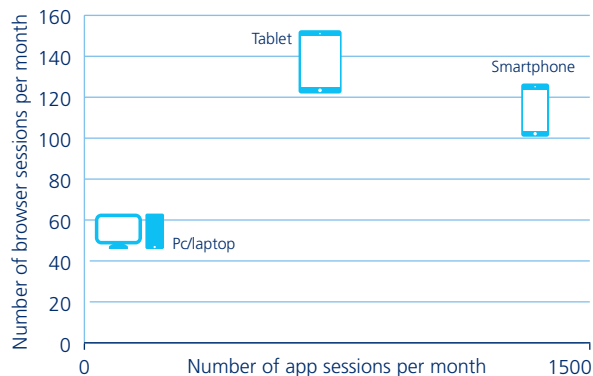


Figure 3c: use of devices (number of sessions)



Phablet: same uses but more use

A trend that is expected to have a strong influence on mobile internet use, is the arrival of the 'phablet'. A phablet is a smartphone whose screen is approaching the size of a tablet's screen. Such large smartphones have been available since 2012 and their market share has been growing strongly. In the middle of 2014, Apple announced its first phablet: the iPhone 6 Plus.

In the Netherlands, the number of active phablet users is relatively small, but their behaviour prompts some interesting questions. Such as where mobile internet use is heading. The phablet users monitored by the survey proved to be 'heavy users'. They visit relatively large numbers of sites, use relatively large numbers of apps and have an average browser session duration significantly greater than that of the average smartphone user. They also use Google more than average and read more news and information. Otherwise their behaviour does not differ greatly from smartphone users.

The role of phablets in mobile internet use is open to question. After a strong start, their sales in 2014 stagnated. In early 2015, the iPhone 6 Plus will arrive on the Dutch market, possibly boosting growth of the phablet segment.

iPhone 6 and iPhone 6 Plus



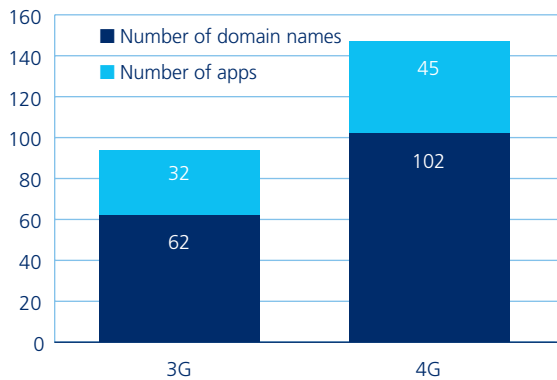
4G: more streaming app use, less time browsing

Although 4G supports faster internet speeds, in practice 4G users spend barely any more time using their browsers. The main difference associated with 4G is significantly increased use of so-called browser-replacing apps. That is primarily because with 4G you can stream content, which isn't generally possible with the slower 3G technology. The popularity of products such as the YouTube app with 4G users is therefore understandable.

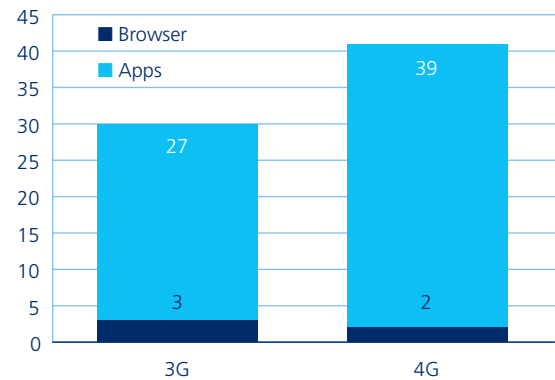
It is noticeable that 4G users visit relatively large numbers of unique domains. However, the visit duration per domain name is extremely short (less than a minute), with the result that their overall browsing time is actually less than 3G users. That reflects the fact that people who have faster network connections need less time to find what they are looking for.

Figure 4: characteristics of 4G users

Browser & app use in hours per month



Browser and app use in numbers per month



4. Apps versus websites

Apps: essential usage trend

The rise of the app is undoubtedly one of the most influential internet usage trends of recent years. Although there are apps that don't require internet access, many perform functions comparable to those of websites. In effect, some actually replace browsers. In such cases, the app serves as an alternative means of accessing content which is also available on a website. Consequently, there has been a lot of speculation in recent years as to whether apps are the websites of the future.

Figure 5a: top 20 websites (reach, %)

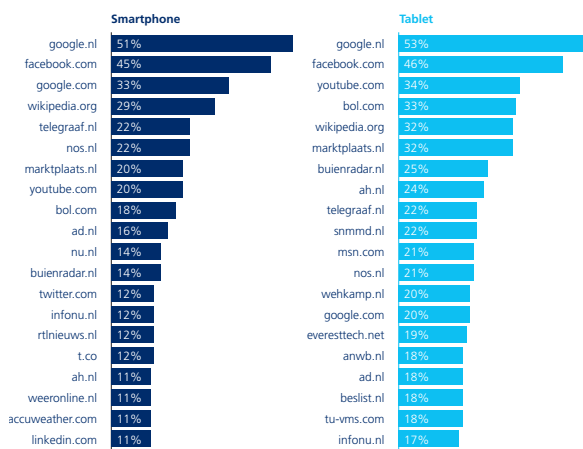


Figure 5b: top 20 websites (usage duration, minutes)

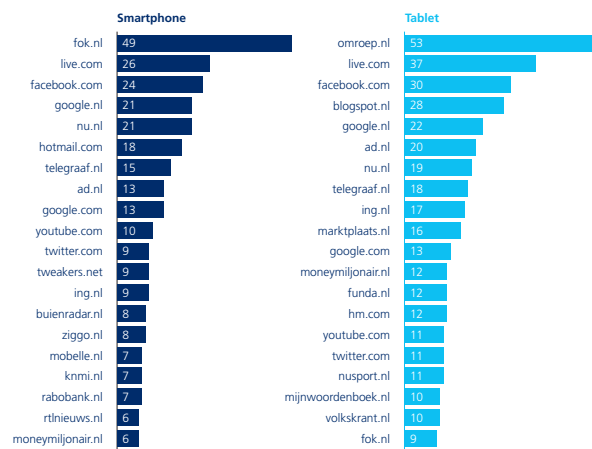


Figure 5c: top 20 apps (reach, %)

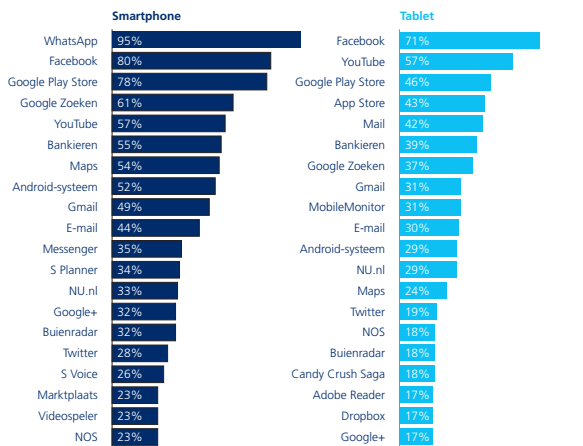
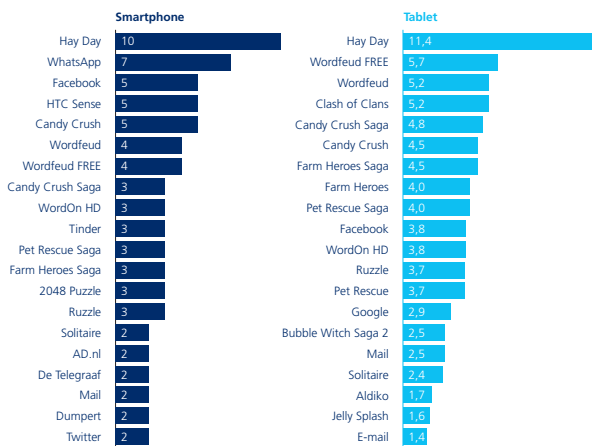


Figure 5d: top 20 apps (usage duration, hours)



Apps dominate in terms of time, not in number

On all devices, the number of websites people visit is greater than the number of apps they use. However, on all mobile devices, apps dominate in terms of the time devoted to them. Gaming apps are particularly popular by that measure. On smartphones, social media and the dating app Tinder are also high on the list.

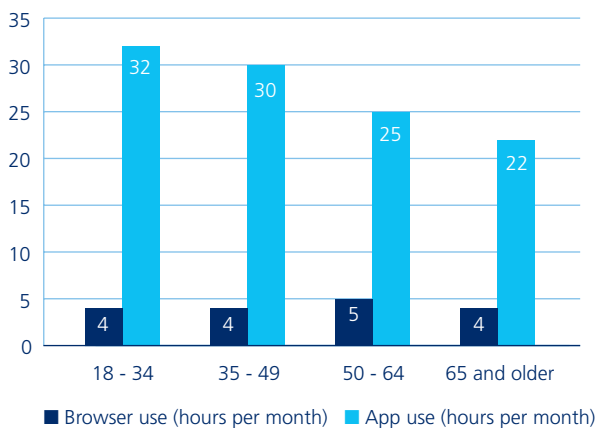
Apps preferred on smartphones

Apps are particularly popular on smartphones. Small screen users find it harder to type in a domain name than to tap an icon. On tablets, with their larger screens, apps are used slightly less, and browsers more.

Browsing duration not age-related, but app use is

If we consider the age of mobile internet users, we see that smartphones users of all ages use their browsers roughly the same amount: an average of four to five hours per month. However, app use declines sharply with respondent age. The greater internet use by young people is therefore almost entirely associated with apps.

Figure 6: mobile app and browser use, by age



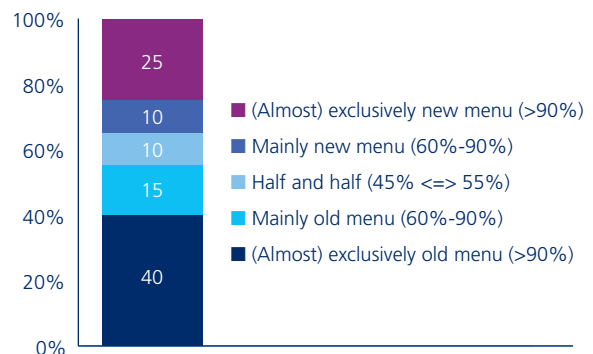
Top apps: more reach, not more usage time

One disadvantage with apps one often hears mentioned is that a user can only reasonably keep track of (or install) a limited number. As a result, app use might lead to less varied internet use. At first sight, the distribution of app use is indeed more extreme: amongst smartphone users, the reach of the eight most popular apps is greater than that of the eight most popular websites. Also, fewer apps are used than websites. However, such numeric data can be misleading. If one considers the amount of time that people spend using apps and websites, the most popular sites amongst smartphone users have barely any less reach than the most popular apps.

Windows 8: opinion divided

The introduction of Windows 8 represented a significant change in the app landscape, since it meant that PC and laptop users also had access to apps. The new operating system actually has two 'start screens': the familiar desktop and a new 'app screen'. Users are divided; people tend to use either the desktop or the new app screen. As a result, it is hard to say what effect Windows 8 has had on the behaviour of PC users in general. Interestingly, a relatively large proportion of young people prefer to use their PCs in desktop mode.

Figure 7: use of old and new Windows 8 menus



5. Navigation trends

Bookmarks lose ground to apps and social media

Over the last ten years, internet use has been dominated by three navigation methods, known as 'The Big Three':

1. Search engines (Google)
2. URL typing
3. Bookmarks

In 2012 those three methods still held sway, but there has since been a significant change: bookmarks are being used a lot less than two years ago, while the use of apps and social media has increased. Overall, bookmarks remain in third place, but apps and social media are now more popular amongst young people. The use of portal sites, such as start pages is marginal and looks set to decline further. Their use is now restricted almost exclusively to older people.

Google and URL typing are most popular

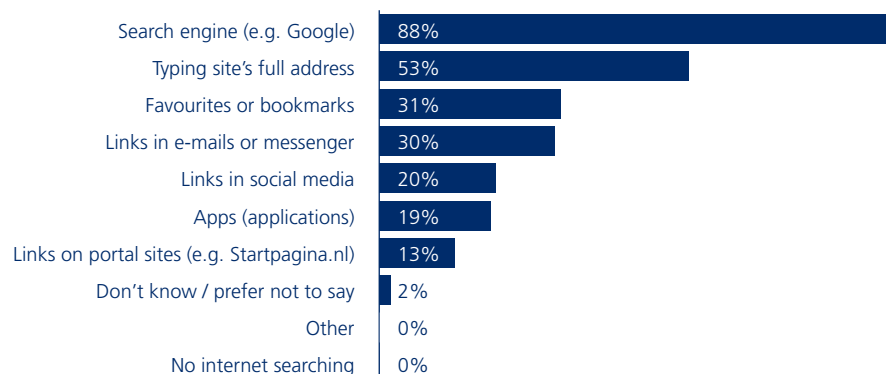
It is instructive to consider not only the actual use of the various navigation methods, but also which methods users prefer. In terms of user preference, bookmarks are clearly in decline: only 8 per cent of all users prefer to reach websites using bookmarks. Google is the most popular, followed by typing a domain name. All other methods are much less popular. In the space of two years, it seems that The Big Three have become The Big Two.

Less educated young people 'heavy Google users'

Google is the dominant mode of internet navigation. More than 90 per cent of internet users regularly use Google, and Google is also users' preferred choice. Nevertheless, the ratio between Google use and domain name typing is reasonably stable: 11 per cent of all navigations on a PC involve Google and 23 per cent of all sites are found using Google. Those figures are relatively stable across all the segments and devices considered, with two notable exceptions:

1. Relatively little use is made of Google on tablets.
2. Less educated young people are more likely to use Google on a daily basis.

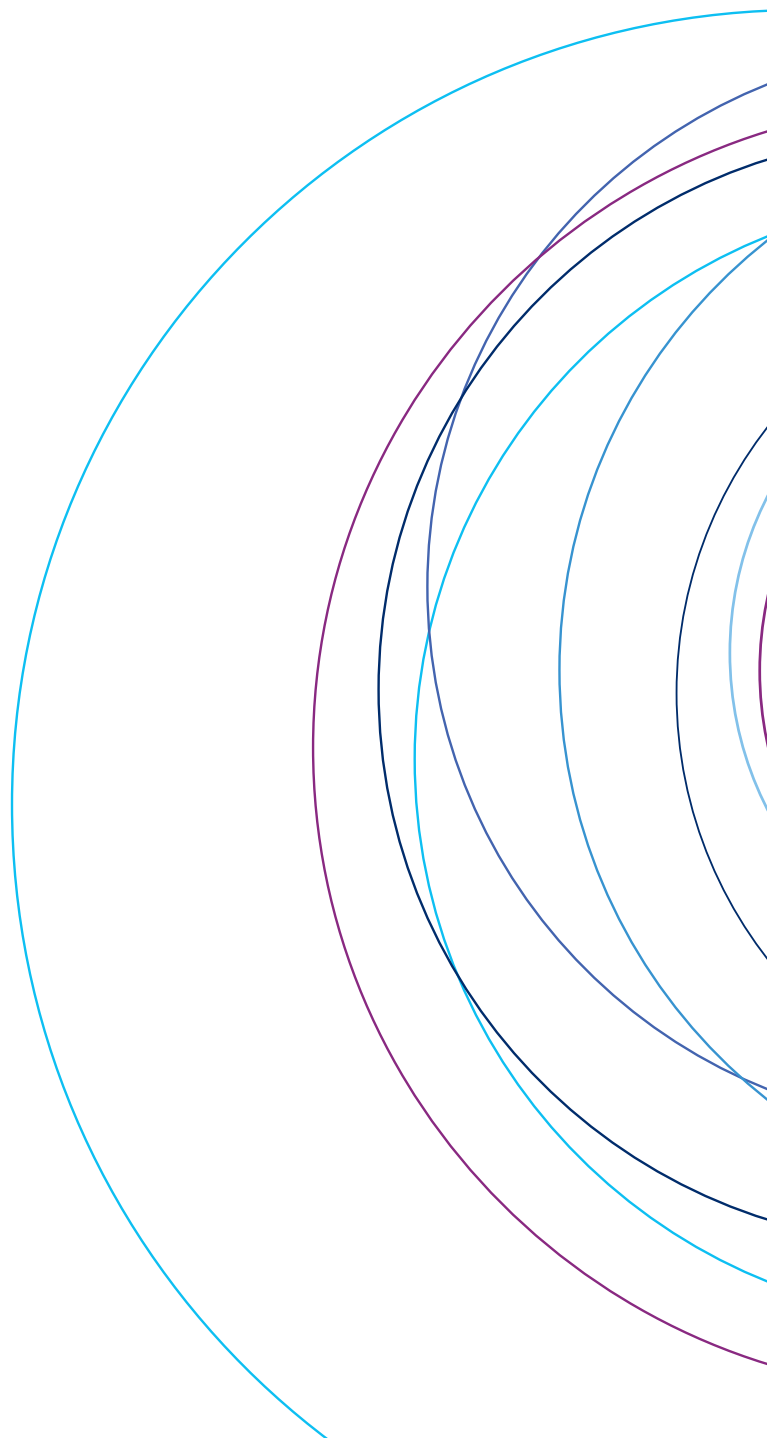
Figure 8: navigation methods compared



Social media positive for internet use

In 2012 we concluded that social media appeared to have a predominantly positive effect on internet use. Furthermore, social media users were more likely to register domain names for themselves than non-users. In other words, the frequently expressed fear that sites such as Facebook might become so dominant that people hardly visited other sites, appeared unfounded in practice. The findings indicated that increased social media use was leading to more internet use in general.

Our latest study reveals a similar picture. Businesses are seeing the significance of social media grow and expect that growth to boost demand for domain names. The passive monitoring of user behaviour on various devices suggests the reason: Facebook users click through to external sites at least nine times a month. Consequently, Facebook is an important driver of website traffic. The Facebook newsfeed is a medium for presenting content to users, in which interest is driven by user posts and advertisers have access to a large audience.



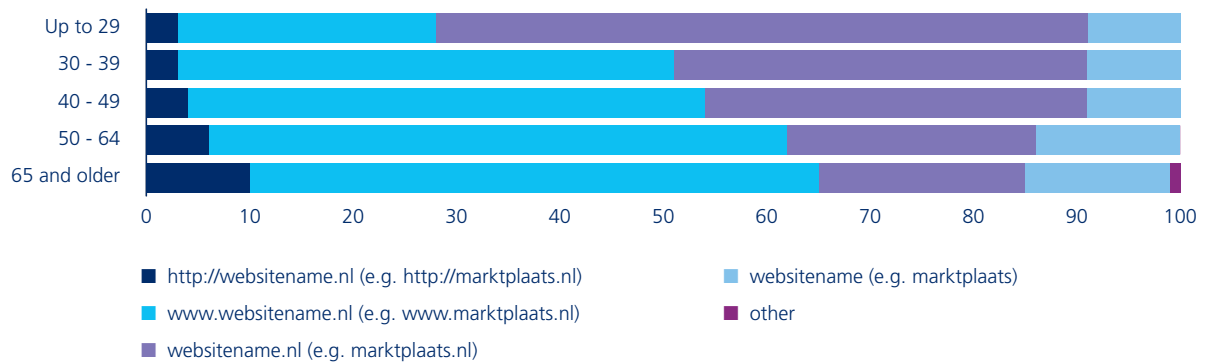
6. Users' attitudes to domain names

Older people most likely to leave off extension

What is a domain name? That might seem an obvious question, but the answer is not straightforward. Not so very long ago, to reach an internet address, you had to type it in full, e.g. 'http://www.domainname.nl'. Nowadays, browsers can get you there if you just type the name and extension.

If you don't enter an extension, what you type is interpreted as a search query. Technically, you haven't entered a domain name, but some users nevertheless think of what they've typed as a domain name. Older people are particularly likely to leave off the extension when entering a URL. Young people do that less, but they rarely type anything besides the domain name. Older users will often diligently type 'www' or 'http', but their younger counterparts rarely bother.

Figure 9: how people usually type website names



New devices likely to increase intention to purchase

Like social media, the use of mobile devices has no discernible negative influence on intention to purchase domain names. Indeed, the average smartphone user is more likely to intend to purchase a domain name than the average PC or laptop user.

In young people, business use is an important registration motive

Generally speaking, the most commonly stated reason for wanting to register a domain name is still the desire to have a personal website. However, there are clear differences amongst the various respondent groups. More educated people and young people register domain names mainly for possible business use and have a relatively strong preference for .nl. Amongst older people, the wish to have a personalised e-mail address is important. And people who want domain names for commercial purposes have a relatively strong preference for .com.

Figure 10: domain name registration motives by age group



Businesses look critically at domain name portfolios

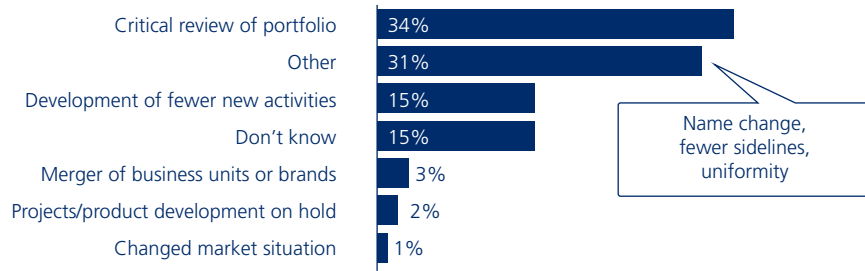
Asked about their expectations for their own domain name portfolios, the number of businesses expecting to have fewer domain names was greater than the number expecting to have more. Small and medium-sized businesses were particularly likely to be looking critically at their portfolios. However, it is important to note that a large proportion of businesses reported being unsure whether they would enlarge or reduce their portfolios. Consequently, actual portfolio developments may not match expectations.

Figure 11: reasons for enlarging/reducing portfolios

Reasons for having more .nl domain names



Reasons for having fewer .nl domain names



Domain names are important indicators for young people

Domain names are not only used for navigation, but also to gauge the value of search results. After entering a query into a search engine, the results with trusted domain names are more likely to be clicked than those with unfamiliar names or extensions. Notably, young people use domain names in that way a lot more than older people.

Figure 12: role of domain name in reliability of extension

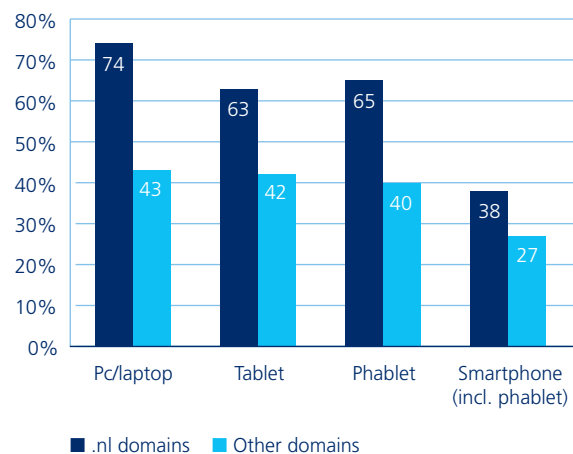


7. Position and significance of .nl domains

.nl more popular on mobile devices

Purely on the basis of use, .nl is the domain most visited by Dutch internet users. The majority of unique URLs visited have .nl extensions. Users also spend most time on websites with .nl domain names. Moreover, passive monitoring of user behaviour indicates that .nl domain names have a slightly bigger share of mobile device usage than of PC and laptop usage. Relatively speaking, tablet and phablet users visit more .nl domains than other domains, and remain longer.

Figure 13: relationship between .nl and other domains



On mobile devices, .nl strong in news and shopping

The differences in the split between .nl domains and other domains on the various devices is attributable partly to differences in the way those devices are used. If we look at the use of domain names by category, we see that .nl has a higher share of the 'serious' forms of use, such as business, news and shopping, but a low share of social media and gaming use. People tend to use their smartphones for news and information, and their tablets for shopping. Consequently, .nl has a relatively large share of internet use on those devices.

Table 1: split between .nl domains and other domains, per category of use

	.nl domain names	Other domains
Shopping	77%	23%
News and information	76%	24%
Business	73%	27%
Gaming	32%	68%
Social media	7%	93%
Other	63%	37%

Usage duration for other domains high on PCs, due to Facebook and YouTube

On PCs and laptops, it is notable that the average duration of a visit to a .nl domain is shorter than that of a visit to a website with another extension. The difference is almost entirely attributable to the amount of time that people typically spend on two .com websites: youtube.com and facebook.com.

Young people more likely to use other extensions

In terms of preference for .nl, there are also clear differences between younger users and older users. Young people visit domains with extensions other than .nl relatively often. Nevertheless, they spend 57 per cent of their on-line time on .nl websites. Amongst older people, the figure is 67 per cent.

.nl most reliable, particularly in young people's eyes

The usage split does not accurately reflect the way the age groups view the reliability of the domains. A higher proportion of young people see .nl as very reliable: 43 per cent, compared with 30 per cent of all users. Young people also form an important target group for registration: .nl domain names are relatively popular amongst young people for future business use. Notably, however, the younger age group does not strongly associate the domain's perceived reliability with the Netherlands. Whether a website is considered reliable or not is more likely to depend on whether it is based in Europe.

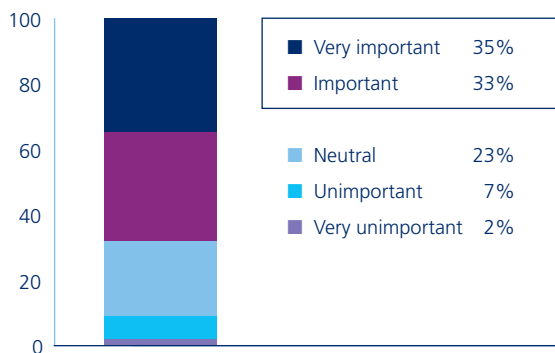
Business market: heavy users foresee growth of .nl

Although businesses generally anticipate the contraction of their domain name portfolios, .nl appears to be reasonably safe. The majority of businesses actually expect the number of .nl domain names they have to increase. Strikingly, the number of .nl names they already have is closely linked to the growth they expect. The larger a business's .nl portfolio, the more it expects that portfolio to grow. Expectations regarding new business activities play an important role in that context.

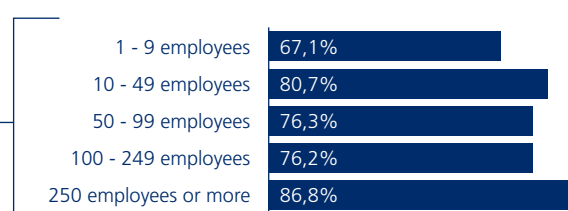
Larger companies appear more aware of the commercial significance of .nl domain names than smaller businesses. Some 87 per cent of businesses with more than 250 employees considered .nl to be important or very important for their activities.

Figure 14: importance of .nl domain names to businesses

Importance of .nl domain names



Importance of .nl domain names, by business size



8. Conclusions

More mobile internet use

The most important trend in internet use is the growth of mobile use. In the period ahead, mobile devices will increasingly shape usage patterns. So far, technological developments involving such devices (phablets, 4G) have apparently had little effect on the way the internet is used; their main impact has been to generate more use. Mobile internet use is currently characterised by high session frequency and short average session duration.

Browser-app split currently stable

In the short term, the split between browsers and apps is likely to remain stable. Mobile device users mainly go online with a relatively small number of apps. When they use a browser, it is usually for a very specific purpose lasting barely a minute.

Bookmarks losing ground as a navigation method

For a long time, PC users had three main navigation methods: search engines, typing domain names and bookmarks. In the last two years, the pattern has changed to leave only two dominant methods: search engines and domain names. However, apps and social media are well on the way to filling the gap left by bookmarks. The position of search engines (primarily Google) appears almost unassailable, with domain names a strong second.

Attitude to domain names not threatened

The good news for the domain name industry is that none of the identified trends seems to have clear negative implications for users' attitude to domain names. Mobile device users appear more likely than other people to register domain names. And businesses expect social media to generate demand for domain names, rather than reduce it.

Businesses foresee smaller domain name portfolios

Nevertheless, many businesses expect their domain name portfolios to contract in the years ahead. That has much to do with the size of those portfolios: a lot of businesses apparently have bigger portfolios than they need. Mainly small businesses expect to cancel some of their domain names when they have a critical review.

Position of .nl relatively strong with businesses

Against the backdrop of a general contraction of portfolios, the .nl domain is expected to do relatively well. Asked about the .nl part of their portfolio, more businesses expect growth than expect contraction. Organisations with more than five .nl domain names in their portfolios are particularly likely to expect an increase in the next three years. Another positive indicator is the relatively frequent use of .nl on mobile devices. In terms of image, the situation looks healthy: .nl is more popular than any other domain and perceived to be more reliable. However, those observations require qualification: a large proportion of the business decision-makers surveyed know little about their firms' portfolios and consequently have little idea how they are likely to develop in the three years ahead.

.nl associated with serious business uses

The .nl domain is perceived mainly as the domain for serious business purposes. People planning to register domain names for such purposes are more likely to opt for .nl. In addition, e-mail from .nl addresses is regarded as very reliable. Users prefer .nl domain names, particularly for 'sensitive' financial and other transactions.

9. The expert panel

On 12 November 2014, we presented the study findings to an expert panel for comment. The experts who debated the findings have different backgrounds but share a special passion for everything to do with the internet, mobile communications and electronic gadgetry. Their particular interest is not so much the technology itself, but the way people use it.



Klaas Weima

Founder and CEO of Energize, a creative bureau specialising in interactive brand communication. Klaas blogs on innovation and brand communication. He gives readings and workshops on digital marketing, trends and brands. In 2013, he wrote a book entitled 'Verdiende aandacht' ('Earned attention'), which was nominated for the PIM Marketing Literature Award.



Jeroen Bertrams

Advises organisations on on-line marketing and social media. Jeroen has written nine books to date, including 'Online Marketing Expert in a Week' and 'Bedwing het monster Social Media' ('Control the Social Media monster').



Matthijs Roumen

Creative strategist at Rhinofly, an interactive communications agency. Matthijs is fascinated by smart innovation and the way that technological developments change people's habits. A lover of sharp copy and allergic to double spaces.



Anne Helmond

Lecturer and researcher in New Media & Digital Culture at the University of Amsterdam. In her research, she focuses on the platform as the dominant economic and infrastructural model for the social web. She lectures on software culture, app stores, big data and social media. As a social media expert, Anne is regularly asked to comment on topical issues in the media.



Sander Duivestein

Speaker, trend-watcher, internet entrepreneur, advisor, author and columnist on the impact of new technology. He has written a number of books and reports in recent years for VINT (the Vision, Inspiration, Navigation and Trends lab of ICT service provider Sogeti). Subjects have included the Internet of Things, wearables, big data, social media, mobile, cloud computing and the economic crisis.



Olav Lijnbach

As senior consultant at research agency GfK, Olav is responsible for Media, Entertainment & Technology. He is a psychologist and economist, with a love of technology and the internet. He looks forward to an organised Internet of Things.

10. Apps – Past their zenith?

- Biggest disadvantages with apps: closed and not social
- Apps increasingly being replaced by responsive sites
- 4G undermines rationale for apps
- Countermove developing, e.g. based on AppLinks
- Expectation: fewer apps, but main ones to continue

Where the development of mobile browser use is concerned, people are using the internet more and more, but also for shorter and shorter sessions. That trend is being accelerated by faster network connections, such as 4G: if you can get the information you want faster, you end your session sooner. In short, people are doing more in less time. The pattern of app use is different. As time goes by, app users are accessing the internet for increasingly long sessions. A growing number of 4G users are now able to stream high-volume content, for example via Spotify or the YouTube-app.

People use relatively few apps, certainly in comparison with the number of websites they visit. Business interest in apps is also waning. Businesses report that they are not crucial for their core business; the focus is much more on the company website, campaign sites and social media.

The apparent mismatch between increasing session length and the small number of apps being used raises the question of where apps are heading. Are we moving towards a mobile internet dominated by a handful of apps? Or is the boom time over; are they past their zenith?

Advertisers: no apps, mobile websites first

When setting up campaigns, nearly all advertisers are asking for responsive designs that work on all devices. For brand utilities, such as internet banking, apps certainly have a function. That will remain the case, but marketing communications are less and less tied to apps. Horizontal growth appears particularly unlikely. With nearly a million apps in the App Store, it is almost impossible to identify the ones that suit you best. *“Combine that with the considerable development cost of apps and it’s easy to see why businesses say, ‘mobile websites first’. There is a good reason why popular subscription-based news services, such as Blendle and The Correspondent, don’t have apps. Their websites have priority.”*

Apps interfere with social traffic; the market is responding

What matters is whether an app offers added value. If not, businesses are increasingly inclined to pull their apps from the App Store and invest in a responsive website. One of the reasons is that more and more traffic is driven by social sharing, such as retweets or likes. The closed nature of an app is hard to reconcile with the social effects that businesses seek. *“The big boys in the market can see the lie of the land. Facebook now lets you load websites within their environment. They have adapted their newsfeed so that users remain within it. The traditionally app-based gaming industry is responding as well; it’s increasingly common that you play from a website. Google is shifting and defining parameters. They want to see the end of the operating system, with everything happening via the browser. These trends can’t be ignored.”*

Main apps will remain, but 4G will make the rest redundant

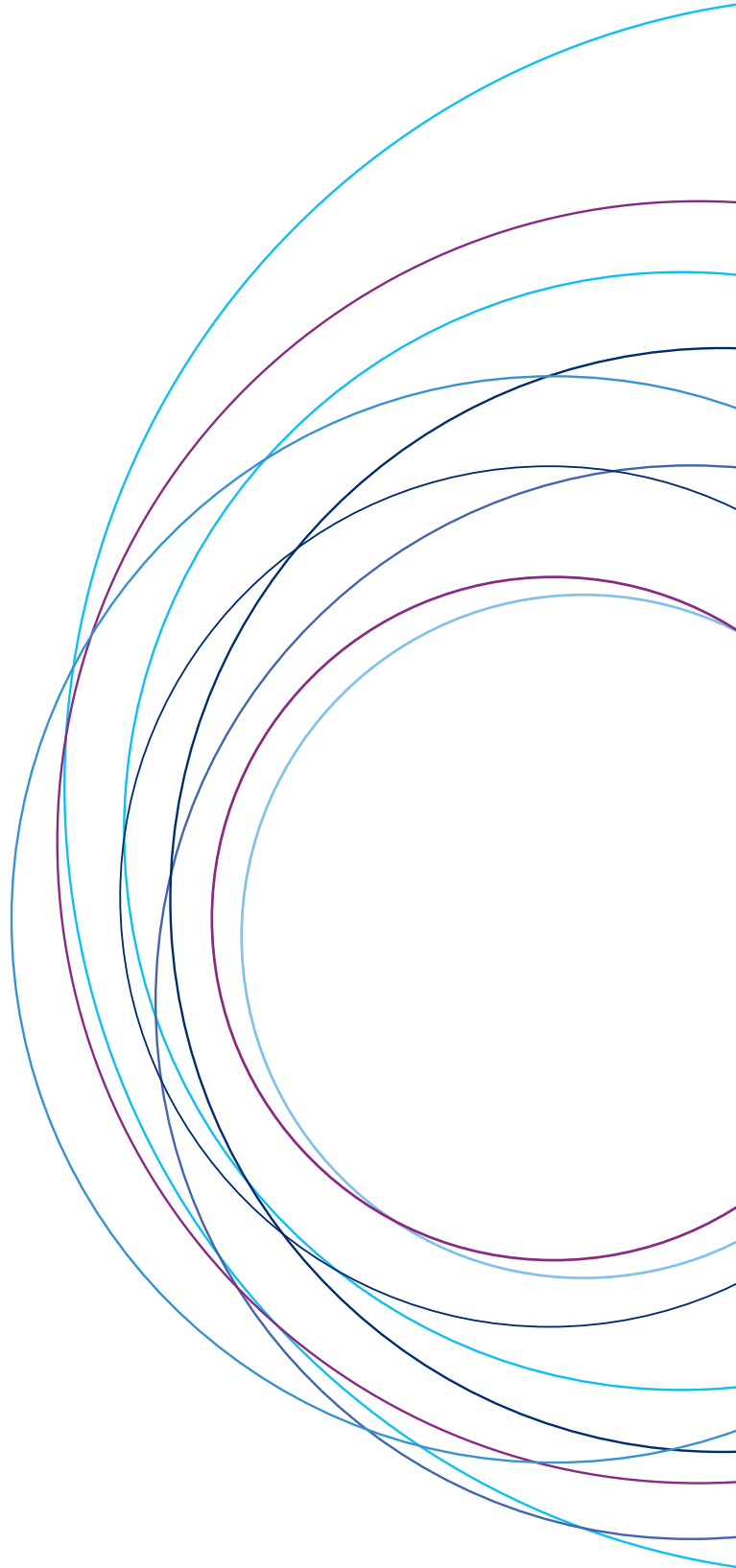
Although people already use only about eleven of the average forty-two apps they have installed, there will always remain a core of useful and secure apps for basic functions: a Swiss army knife on your phone. Other functions will be taken over by responsive websites, with all their attendant advantages: no messing with updates and managed from a single point. *“With the rollout of 4G, the biggest advantage of apps – that the data can be pre-loaded – becomes much less of an advantage. Once the data can be accessed just as easily via a website, the reason for an app disappears.”*

Apps mainly for fun

One thing is crystal clear: entertainment will be the main theme of the app market. Fun is 'key' on mobile devices, which are used mainly for digital snacking: briefly playing on Hay Day or scanning nu.nl. Sessions of use often last only a minute or so and involve solitary activities with no social dimension. It can't really be any other way, because apps are inherently closed systems. With a website or a platform such as Facebook, you can interact with larger groups of people, and the demand for interaction is apparently considerable. *"Besides, whenever you want to write a long message or book your holiday, you use your PC or laptop. If you really need to think about something, you sit down at a keyboard."*

To survive, apps are becoming more open

The existing generation of apps is threatened, mainly because they cannot offer the social exposure that users and businesses want. It will therefore be interesting to see how app builders respond. Will apps discover the resilience needed to survive and fend off the encroachment of the browser? *"We are already seeing changes: techniques are being developed that mean apps are no longer 'walled gardens'. Instead of being self-contained packages, they are becoming more open and breaking out of their own silos by acquiring the ability to interact with other apps and websites. Take Facebook's AppLinks, for example."*



11. Mobile – Is there still scope for in-depth use?

- Mobile devices and ephemeral behaviour dominant
- Devices for 'serious' internet use will nevertheless continue
- Internet use will cease to be screen-dependent
- Third-generation devices: to supplement or replace existing devices?

Mobile devices – and the associated 'snacking' – will become increasingly dominant. Internet use will become briefer, more ephemeral and less varied. Will that influence all our internet use, or will PCs or laptops retain a serious role? Perhaps a new type of device – such as the Smart TV – will assume the status of the preferred medium for 'quality' use. The panel was therefore asked: will mobile snacking become the norm, or will there remain a place for internet devices adapted for more in-depth use?

Visual culture marches on

As a society, we are in clear transition from an oral culture to a visual culture. That is encouraging brevity. We are using more and more devices to obtain visual stimuli. *"If I need to cook something, I don't download a recipe any more. I watch a YouTube video and copy what I see. Much easier. The same goes for user manuals: the message has to be got across in two minutes. Any longer, and people switch off. That's the way it is these days."*

Relaxing agitation

Ephemeral behaviour has become first nature to us; our agitated minds have a constant need for fast kicks and information shots. *"I was recently at a cabaret show, where the artist challenged us not to look at our mobiles during the interval. A palpable shockwave went through the room; everyone already had their phones in their hands. After the interval, he asked how many of us had looked at our phones anyway. About half. And what had everyone done? Nothing much: scanned the headlines, sent a message. Couldn't it have waited? 'Of course,' everyone said. But we were kidding ourselves. We spend all day with this ultra-brief nonsense – perversely for relaxation. Why do you think that those banners on nu.nl are gradually appearing higher and higher up the page? Because no one reads more than the first paragraph of an article."*

Natural balance

The assumption is that 'serious' internet use is more likely to be on a large-screen device. But is that assumption valid and, if it is, what exactly will the screen be like? Notably, tablet sales, which had seemed to be on an inexorable rise, began to level off this year, while sales of laptops and PCs rose a little. *"It looks as though the market has settled down and a balance has been established between the various devices. That in turn tells us something about users' habits. You have a tablet on the coffee table and you pick it up when you just want to quickly look something up. But if you need to read a long article, it's still more agreeable to do that on a larger screen. Your phone or your tablet isn't a replacement for your laptop or PC, but an additional aid."*

'Both... and' not 'either... or'

The smaller the device, the shorter the average period of time we spend on the net. However, the reverse is also the case, and that offers perspective for prolonged internet use. Is it only the screen size that matters, though? *"As The Internet of Things takes shape, our homes are going to fill with screens... screens of various sizes, with various functions. Those screens are certainly going to be different from our mobiles and tablets. Those are on-the-go devices, and if I've got work to do, I want to sit at a larger screen. At home, when I manage my money, book a journey or look for a new car with my partner, I do it on my laptop, or maybe on a tablet. For each situation, for each thing I want or need to do, I select the most appropriate device. It isn't 'either... or'."*

Mobile: key to every source

Nevertheless, it is questionable whether the 'device-screen size-keyboard' relationship is actually relevant. A mobile device is, after all, nothing more than a piece of hardware with which you engage other sources, if necessary an eighty-inch screen. *"If technology continues to develop the way it has been developing, using a smartphone won't mean being tied to a small screen. It's more likely to be the other way around: when you want to do something on the net, you look for the most suitable sized screen. The device that you have in your hand, often a mobile, is your means of accessing that screen. And, if speech recognition makes its breakthrough, you probably won't need a keyboard any more."*

Generation question

Whether laptops and PCs will ultimately be supplemented or replaced by a new generation of devices remains to be seen. The need for traditional equipment for in-depth activity appears obvious, but that belief prevails mainly in the older generations. Existing norms and values inhibit our ability to imagine what is possible. Communicating without a screen or keyboard seems inconceivable. *"Exactly: witness the protests against that new Google car, with no steering wheel or pedals. 'That's not a car!' we shout. But young people don't think in terms of traditional options, they utilise the possibilities that exist here and now. Apple enables you to synchronise between various devices. If you can send information to your TV via Airplay, you don't actually need any hardware besides a screen and a wireless keyboard or better SIRI version."*

Technology as sixth sense

A future development might involve not using screens at all, but downloading holographic projections or giving oral commands to a virtual assistant. Perhaps we will have chips embedded in our necks. Such ideas would depend on the introduction of a third dimension to internet use: 3D or even 4D solutions, in addition to traditional equipment for serious activities and mobile devices for snacking. *"Technology is moving ever closer to our skin and becoming more sensory, as you control devices by sight, speech or movement. So technology is becoming our sixth sense. It isn't going to happen tomorrow, but it's closer than people tend to imagine."*

12. Domain names – Young people see them as useful

- Young people take domain names seriously, despite free alternatives
- For business use, .nl and .com are easily the most popular
- Domain names represent exclusivity; they are 'special'
- Hubs such as IdentiFi are breaking the monopoly on reliability

Young people appear to be very conservative when it comes to registering domain names; they vote en masse for .nl, followed by .com. Extensions such as .org, .nu and .eu don't interest them. They see a domain name as something exclusive, as a calling card. Especially if you work for yourself or want to start a business. An e-mail address is of much less interest to them. Possibly because of the success of Gmail, or because e-mail is being replaced by services such as Messenger and WhatsApp. That outlook may indicate a watershed in the on-line landscape: apps are for fun, domain names for the 'serious' internet. But is that actually the case?

Free alternatives

It may be that young people take domain names seriously because they cost money. If you build a simple website, the hosting will set you back about forty euros a year. Hardly a princely sum, but enough to make you pause and consider. *"That's right, but there are completely free alternatives. Lots of young people are active on Tumblr, or building themselves free sites with WordPress. If you want to do serious stuff on the internet, you don't necessarily need a domain name. There are limits, of course. If, for example, you want an SSL certificate for your webshop, you don't link it to a Tumblr domain."*

.nl 'separates the men from the boys'

Nevertheless, young people understand full well that if you want to be taken seriously as a freelancer or a start-up, a Hotmail address just won't do. Certainly in the Netherlands. In Belgium, by contrast, personal references are much more important. A Brussels caterer won't think twice about corresponding with the European Commission from a Hotmail account. *"That's as may be, but here it's a litmus test: are you serious or not. Yes? Then you need your own domain name, like any other business. Young people stick with Google for a while, until they want to start earning money. Then the business has to grow up, and they get themselves a .nl or .com domain. I don't know anyone in business that doesn't have a domain name."*

Marketing nostalgia and exclusivity

Domain names don't look like meeting the fate of traditional post, slowly but surely being edged off the stage by a modern alternative. And yet... The old-fashioned, handwritten card has recently been resurrected, by businesses such as Winkelstraat.nl and Coolblue, for example. *"Yes, that's been in the news, because post has become a quaint curiosity. When a handwritten card drops through the door, people are surprised and intrigued. Maybe one day something similar will happen with domain names. In that sense, 'serious' isn't the right word. You get a domain name because it's 'special'."*

No monopoly on reliability

If you have the support of the young, you are secure. So the domain name appears safe for the time being. Young people associate domain names with substance, certainly in the business world. And with reliability. However, classic, centralised bodies such as SIDN have no monopoly on reliability. *"With the rise of the platform economy, people don't want to be dependent on big monopolies. So you are seeing more and more independent, de-centralised hubs appear, such as IdentiFi. They collate all your profile information from Facebook, Twitter and Google+, and give you a reliability rating. It's a new way for people to assure their reputations on the internet, without having a domain name. So the .nl extension is no longer the only reliable calling card."*

Colophon

This is a summary of a study report compiled by GfK on behalf of SIDN.

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