



It's all about the smartphone.

Research report on Trends in Internet Use 2018



Your world. Our domain.

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1 It's all about the smartphone

More and more people are using the internet, and using it more intensively, as new possibilities open up. However, it's vital that people can have confidence in the internet's quality, security and privacy. Are we using the internet in the same way as two years ago, or have our habits changed? And what are the implications for firms that do business using apps and websites? Will the demand for websites and domain names be influenced by shifting usage patterns?

This report, Trends in Internet Use 2018, seeks to address such questions. It is the fifth report yielded by an initiative started in 2012: as part of our role at the heart of the Dutch internet, we continuously monitor the way that the net is used in our country. Particular attention is paid to the relationship between internet use, domain names and business use of the web. We periodically compare our findings with earlier data and publish the results.

Next year, we intend to publish two additional trend reports, on internet security and e-identities: two growth domains that, although already covered by Trends in Internet Use, now warrant specific attention. If you'd like to know when the reports come out, subscribe to our newsletter at www.sidn.nl/nieuwsbrief.

We are SIDN

The Foundation for Internet Domain Registration in the Netherlands (SIDN) has been responsible for running the .nl domain since 1996. Our mission is connecting people and organisations to promote safe and convenient digital living. In partnership with around 1,200 'registrars', we ensure that all 5.8 million-plus .nl domain names remain reachable. SIDN additionally processes registrations and updates, handles disputes and contributes to the security of the internet in the Netherlands. Other activities include cybersecurity research and scanning for suspect behaviour. In connection with those activities, we also develop new services, such as the Domain Name Surveillance Service (DBS).

2 Methodology

Trends in Internet Use is distinctive because it draws on data gathered using three methods:

1. Measurement of internet use

Since 2014, we have used passive techniques to measure actual consumer behaviour on laptop/PC, tablet and smartphone. Using the single source GfK panel (GfK Crossmedia Link/GXL), we monitor how ten thousand people use the internet. More than 68 million data items are gathered in each measurement round.

2. Questionnaires

We recruited 758 business market decision-makers and 3,857 consumers to complete questionnaires, enabling us to compare actual behaviour with attitudes.

3. Expert panel

Six specialists were asked to analyse and comment on the results during an expert session. Outline biographies of the experts are presented at the end of the report.

3 The smartphone era

In recent years, the smartphone has dominated internet use in the Netherlands. More surprisingly, devices with the potential to offer similar functionality, such as Google Glass and smartwatches, have yet to make a real impact on usage patterns – despite the significant market share secured by the smartwatch in 2018. The smartphone lets us quickly and easily find the information we want, no matter where we are: we're 'always on'. And that has considerable impact on the way we search.

Short sessions are the norm

While it's no surprise to learn that smartphone use is increasing, the rate of increase may raise a few eyebrows. Whereas in 2014 smartphone users' combined browser and app time averaged 29 hours a month, the figure for 2018 was 61 hours. The rise is attributable almost entirely to a small number of apps, which we are using more intensively. The number of websites that we're visiting on our laptops, PCs and tablets is declining.

> Graph 1: Total on-line time for smartphone users, in hours

Enterprises that want to do business on line therefore need to concentrate on smartphone users; fast, powerful solutions are the future, because customers want to find what they want quickly. From our results, it's clear that website visitors want to keep their visits

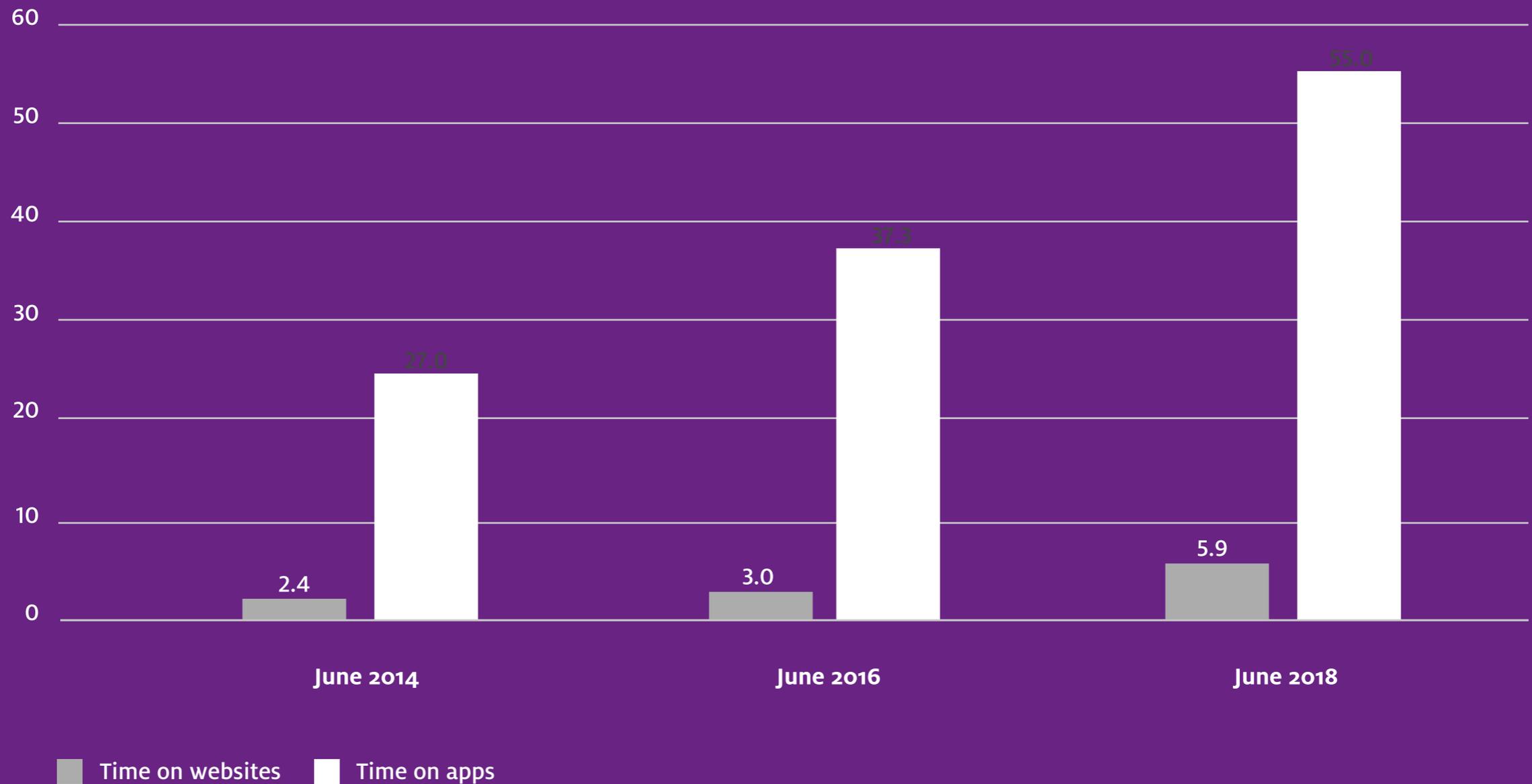
as short as possible: the average time that a smartphone user spends on a website remains limited to 2 to 3 minutes per session. Inevitably, therefore, the average duration of a website visit across all devices has dropped sharply. The implication is that, to succeed, a business needs a website set up to enable the visitor to obtain the information they want within that time span.

For that reason, the choice of hosting service is important for sites and apps alike. A fast-loading site or app can be the difference between a sale and a lost customer. Where websites are concerned, speed also influences Google ranking. Indeed, Google is developing and supporting initiatives to speed up web technology. So the importance of fast hosting looks set to keep growing.

Google Maps popular with smartphone users

As indicated above, the smartphone is changing the way we search. For example, we're searching less for illustrations and more for locations, and we do fewer searches on our smartphones than on our PCs and laptops. Smartphone users therefore lean towards Google Maps. That's reflected in the market penetration stats: 56% of smartphone users search with Maps, and only 44% with classic Search. So, for location-based services, visibility in Maps is at least as important as visibility in Google Search.

More internet time, but shorter sessions



Graph 1: Total on-line time for smartphone users, in hours (Source: GfK Crossmedia Link/GXL)

4 Voice: hype or happening?

Over the last few years, the trade press has given a lot of attention to a new search form: voice. In 2014, research consultancy comScore made waves by predicting, “By 2020, more than half of all searches will be voice-based.” The statement turned out to have been taken out of context. Nevertheless, the hype had started: one article after another predicted that voice was the future.

However, the new technology has yet to take off in the Netherlands. In June 2018, only 3% of users – 5% of young people – named voice as a preferred search option. It’s important to qualify those figures by acknowledging that Dutch-language voice tools remain in their infancy. A Dutch version of Google Assistant has only been available since July, for example. Consequently, most experts on our panel subscribe to the view that the uptake phase has barely begun. Voice technology may not be the norm by 2020, but its rise still looks inevitable. Where the US and China lead, we are likely to follow.

Every business is therefore well advised to consider the possible implications of voice and to look for ways of stealing a march on the competition. In that context, it’s worth remembering that, while voice, text-to-speech and speech-to-text functionalities are handy for most internet users, they’re an absolute boon for people with weak literacy skills, the elderly and those with visual impairments. Smart voice applications can make businesses accessible for new target groups.

“Voice is already a dominant force, just not in Europe yet. An enormous number of homes in the US -- one in four -- are using Alexa or Google Home. And, in China, almost no one types any more: everyone is talking to their devices.”

Jorij Abraham, *Ecommerce Foundation*

“From a marketing viewpoint, voice development is very interesting. Organisations already consider the ‘tone of voice’ of their written material, but now they’re having to think about their voice in a literal sense. Do we want a male voice or a female voice? Do we ever want to sound angry?”

Klaas Weima, *Director of Energize*

“Voice control marketing has all sorts of applications. For example, it would have been good for the government’s MONO campaign about hands-free driving.”

Patrick Petersen, *AtMost*

5 Facebook and Google lead the way

Of the 61 hours spent on line using a smartphone, the average internet user devotes about 26 hours to the websites and apps of just two providers: Facebook and Google (or, to be precise, Google's parent company Alphabet Inc). To put that in perspective: it's more than the average smartphone user's total time on line just four years ago. What's more, a large proportion of internet use is entertainment-related. For example, in June 2018, an average of eleven hours a month was devoted to smartphone gaming, including ten hours on Pokémon Go.

It isn't simply our time on line that Google and Facebook dominate. They're also head and shoulders above the rest in terms of reach: of the ten apps with the biggest penetration of the smartphone market, nine belong to the two internet giants. In fact, they are close to monopolising the top ten, because Instagram – acquired by Facebook in 2012 – is in eleventh place and very much on the up.

> Table 1: [Top 20 smartphone apps on basis, by reach](#)

From the data, it's clear that Facebook and Google are pretty much vital for business success on line. If you don't have a presence on those platforms, you're invisible to the average internet user for nearly half the time they spend on line. Where young people are concerned, for more than half the time. However, you do have various options within the bounds of the two empires: For example, Instagram is growing rapidly and may become an attractive alternative to its 'parent site', Facebook. So businesses are well advised to maintain an Instagram presence.

Amongst under-nineteens, Instagram's reach (72%) is now bigger than Facebook's (64%). Instagram is a purely visual medium, making it ideal for businesses that lean heavily on their products' looks. It therefore has great potential for sectors such as fashion, eating/drinking out and gardening.

Google and Facebook dominate smartphone use

Position 2018	App	Reach in 2018 (%)	Reach in 2016 (%)	Delta
1	WhatsApp Messenger	71	60	—
2	Google Maps	56	40	^
3	Facebook	53	52	^
4	YouTube	51	38	^
5	Facebook Messenger	47	42	^
6	Google Search	44	36	^
7	Gmail	35	29	^
8	Google Play-services	35	23	^
9	Drive	32	24	^
10	ING Bankieren	29	17	^
11	Instagram	27	17	^
12	Buienradar	25	19	^
13	Marktplaats	25	21	^
14	Rabobank Bankieren	23	20	v
15	Google Foto's	23	-	—
16	Spotify	23	-	—
17	NU.nl	21	20	^
18	Twitter	19	17	^
19	NOS	19	17	^
20	LinkedIn	19	13	^

Table 1: Top 20 smartphone apps, by reach

6 Internet-free living: trend or quirk?

Our increasing use of the internet has led many commentators to suggest that modern society is addicted. That has given rise to media reports of a countertrend: people choosing to go internet-free. Our research found that 79% of internet users sometimes choose to disconnect, with older users more likely to do so than younger ones. Amongst under-thirties, 30% said that they were permanently on line. They keep a constant eye on their smartphones, motivated by their 'fear of missing out' (FOMO).

> Table 2: Percentage internet users who choose to go internet-free

Our expert panel expects the countertrend to gain momentum. That belief is supported by the rise of internet-free holiday venues, and cafés and restaurants with internet blackspots. Various large organisations have picked up on the countertrend and aligned their offerings. The latest version of iOS features screen time management functionality, and WhatsApp recently announced the introduction of a 'holiday mode'.

Nevertheless, our experts stressed that internet-free living will remain what it is: a countertrend. With the rise of the Internet of Things and new devices, time spent on line looks set to keep on rising.

"Pretty well all of us are 'always on', and people recognise that now. But going completely off line – if that's even possible – is the other extreme. However, there is middle way: being aware that you're on line and recognising the implications."

Martijn Arets, expert on online platforms

Going internet-free or always on

	Total	Age				
		18-29	30-39	40-49	50-64	65+
Several times a day	37	22	21	37	45	50
Once a day	11	11	13	11	13	9
3 - 6 times a week	5	5	6	5	5	5
1 - 2 times a week	7	9	7	7	7	5
1 - 3 times a month	4	8	7	4	3	2
Less often	14	15	18	16	13	12
I never choose to go internet-free	21	30	29	20	15	17

Table 3: % internet users who choose to go internet-free (n=3,867)

7 Smartphone-based e-commerce: apps dominate, boundaries are blurring

The smartphone is now an integral part of the way we use the internet, for searching, communication and gaming. But what are the implications for the business community? What should a business do to cater for smartphone users?

More use of smartphones for shopping

More than half of webshop traffic is provided by smartphone users. Clearly, lots of us are using our phones for shopping. Not necessarily for all elements of the process, however: we're happy to browse on our phones, but less inclined to make purchases that way. By contrast, buying by phone is very normal in other parts of the world, especially Asia.

And the Netherlands is moving in that direction too. That trend is closely linked to the rise of travel and shopping apps, such as Booking.com and Bol.com, and banking apps that work without separate scramblers. The number of internet users who prefer to use their smartphones for internet shopping more than doubled between 2016 and 2018.

> Graph 2: [Smartphone-based e-commerce on the up](#)

Research by Thuiswinkel.org found that 32% of all smartphone owners used their phones to make on-line purchases, including the financial transactions, in Q2 2018. The figure was higher (50%) amongst laptop users, but laptop-based shopping is in decline, [in contrast to smartphone-based shopping](#).

Apps: driving force behind smartphone-based business success

An average of three hours is now spent on mobile shopping apps and

websites: one hour more than in 2016. Notably, websites are used mainly for incidental purchases; regular customers prefer apps. And a smartphone user who has got a firm's app installed will use that firm's services much more often.

Not surprisingly, therefore, businesses are investing more and more in their apps, and pushing them harder. Despite those efforts, the chances of an app catching on are small: people are installing a growing number of apps, but using them very selectively. For example, the average number of apps used for on-line shopping is just two a month. No one familiar with the Dutch market will be surprised to hear that Bol.com is the most widely used. Fewer people might guess that AliExpress – owned by Chinese company Alibaba – comes second

> Table 3: [Top shopping apps](#)

“Repeat purchases on a mobile are really easy: you know what you want and where to get it, and you can pay immediately using your banking app. However, filtering isn't so good on a phone, and menu structures aren't always optimised. So a lot of people still opt for a large-screen device, such as a PC or laptop.”

Berend van Dalzen, *Realtime Register*

E-commerce crosses national borders

The rapid rise of AliExpress is part of a trend: over the last two years, on-line business has become increasingly international. The internationalisation of internet shopping has been led by AliExpress and Wish. Both are now amongst the twenty most-used shopping apps, although Wish wasn't even active in the Netherlands two years ago.

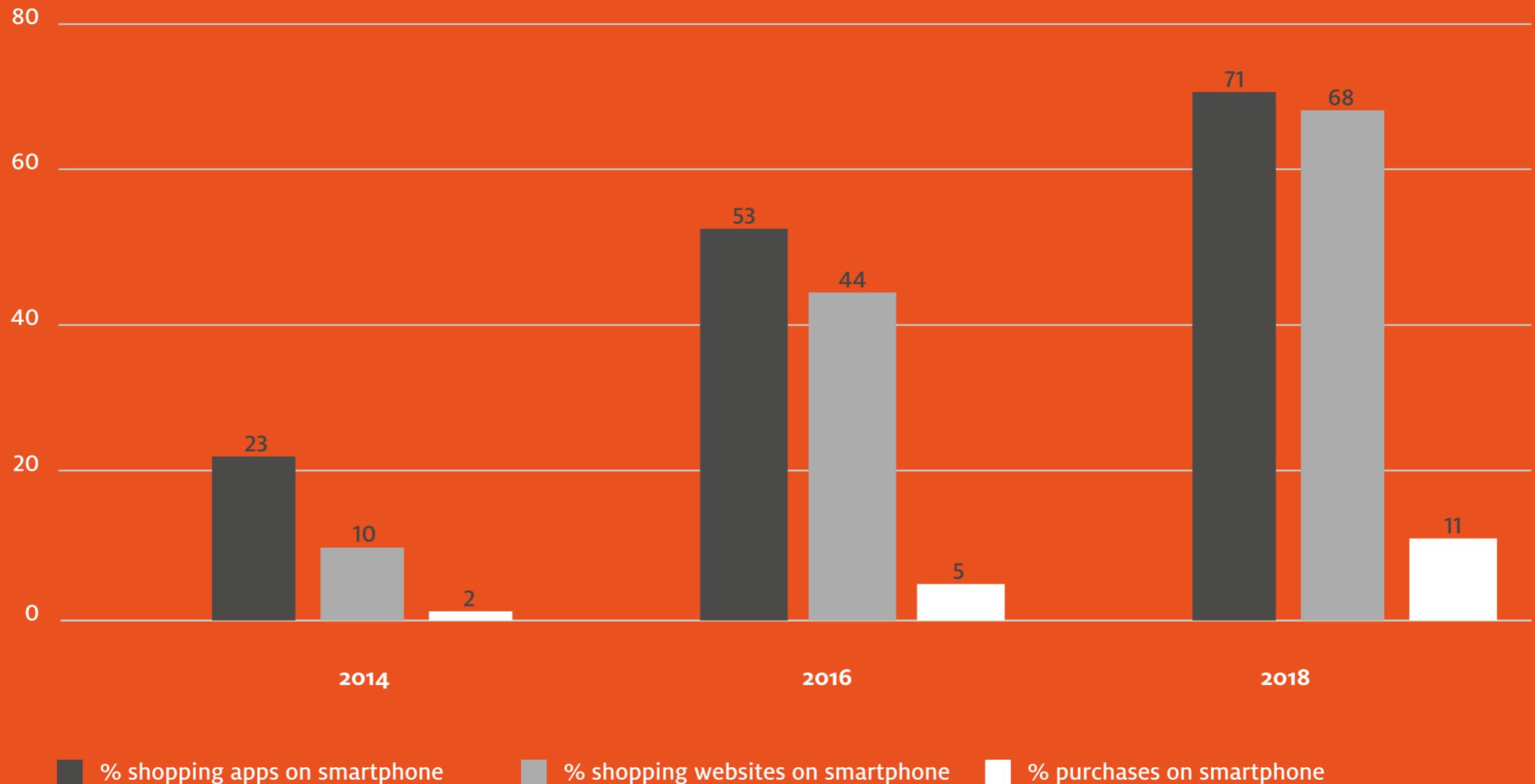
The declining significance of national borders is reflected in the attitudes of our survey respondents. When buying from a firm for the first time, consumers pay more attention to reputation and less to location. It no longer matters much whether a company is based in the European Union. Internet users worry about where a seller is only if shipping or after-sales service is an important factor.

> Graph: 3 When making a significant purchase from the internet, does it matter to you where the supplier is?

Domain name market is changing

Changing habits and outlooks are influencing the domain name market. Increasingly, Dutch businesses, especially newer ones, are looking to sell internationally and therefore register the .com versions of their .nl domains. Interestingly, very few consider using Europe's .eu domain. None of our respondents were interested in the new domain name extensions (nTLDs).

More use of smartphones for shopping



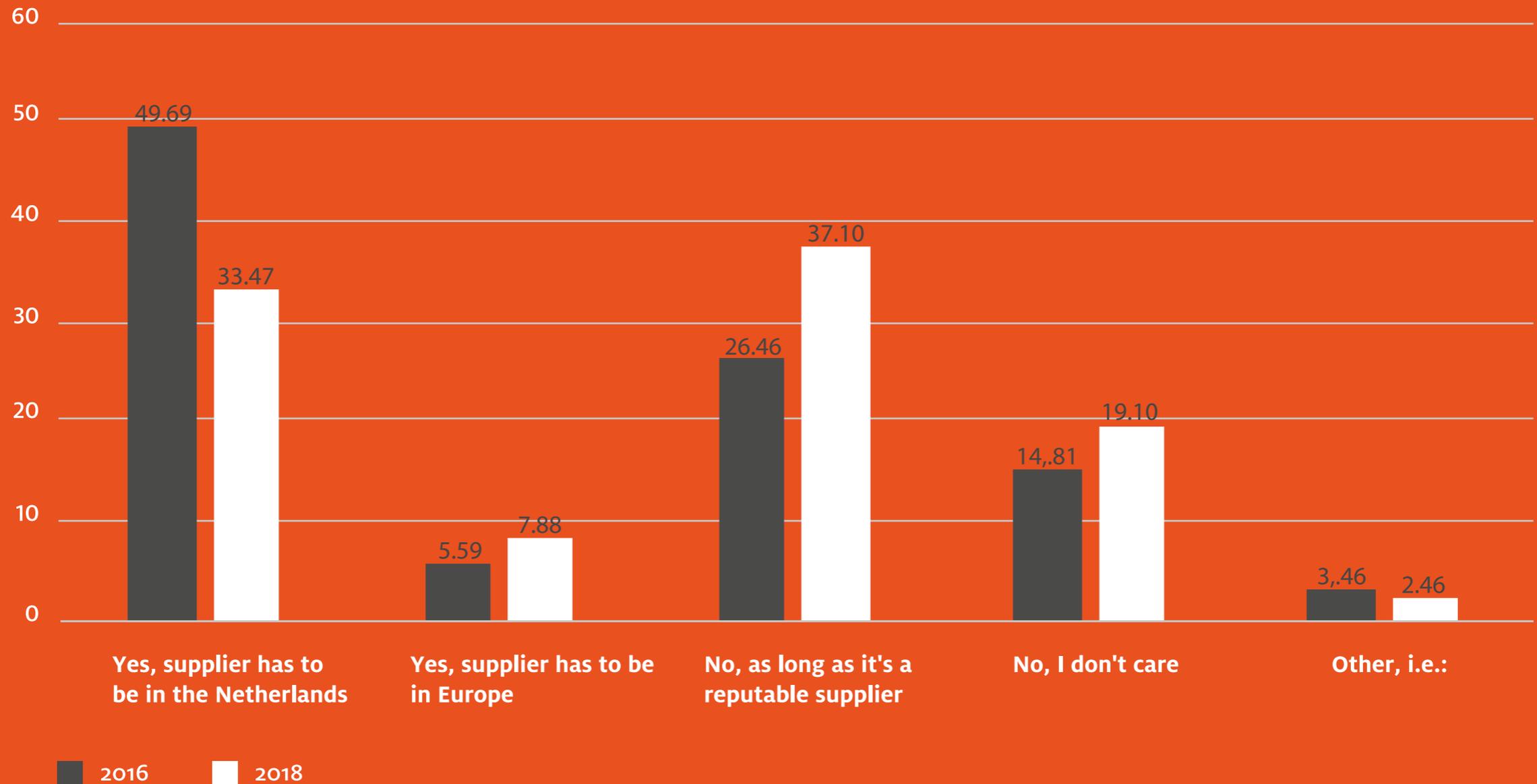
Graph 2: Smartphone-based e-commerce on the up (Source: GfK, n=3,857)

The rise of shopping apps

Position 2018	App	Reach, Juni 2018 (%)	Reach, Juni 2016 (%)
1	Bol.com	17.6	7.7
2	AliExpress Shopping	16.9	6.7
3	HEMA	11.1	0.6
4	Appie van Albert Heijn	10.3	9.2
5	Wish	10.1	0.0
6	Thuisbezorgd	7.7	5.3
7	Media Markt Nederland	6.0	8.0
8	H&M	4.4	3.2
9	Jumbo	3.9	3.7
10	Zalando	3.8	2.3
11	Picnic	3.4	0.0
12	wehkamp.nl	3.2	1.7
13	Kruidvat mobiele	2.4	5.5
14	IKEA Store	1.8	1.8
15	Vente-Exclusive	1.7	0.9
16	Hunkemoller	1.6	1.0
17	Ticketmaster	1.4	0.0
18	vanHaren	1.4	0.0
19	iBood	1.3	0.0

Table 3: Top shopping apps

E-commerce crosses national borders



Graph 3: When making a significant purchase from the internet, does it matter to you where the supplier is?
(Source: GfK, n=3,647)

8 Domain name market benefits from economic growth

In recent years, the domain name market has been buoyed by economic growth. New projects, products and businesses create demand for new domain names. Most domain names are registered for business use. Firms that expect growth in the years ahead believe that their domain name portfolios will get bigger.

> Graph 4: [Reasons for acquiring more domain names](#)

That is entirely consistent with the findings of our 2016 research. The prospects for on-line business are good, both for companies with internet-based plans and for businesses in the domain name industry, such as registrars and hosting service providers.

From product to brand

Last summer, Coolblue announced plans to close a large number of individual webshops with product-specific domain names (e.g. zakmesshop.nl for penknives), and to move their offering to a consolidated site, Coolblue.nl. The move made sense following the firm's launch of a consolidated app for all Coolblue sites in 2017. A small number of relatively large businesses are following suit: bringing together separate, product-related websites to create a unified site with a corporate brand. The rationale for the strategy is that a single brand is easier to build.

Its effect is that some businesses expect their domain portfolios to contract in the period ahead: more than half of those expecting to shed domains cite centralisation around a single brand as the prime reason. The domain name market's growth is unlikely to be affected in the short term, however, because far more businesses anticipate portfolio expansion. Even firms who see their domain name portfolios shrinking

continue to attach great importance to their primary websites. To keep in step with developments, registrars and hosting providers are well advised to focus on increasing the service package per domain name (add-on security services, etc) rather than selling more domain names

> Graph 5: [Reasons for shedding domain names](#)

Our experts believe that migration from multiple product sites to a single corporate brand makes sense. In the past, product sites with keywords in their domain names were good for snaring search-generated traffic. However, Google has changed its search algorithm, so that relevance and authority now play a bigger role. Also, the companies that are consolidating have become too big to rely on Google to bring in their trade; they are now using radio, TV and other channels, for which a strong corporate brand is essential. Going forward, such expansion and protection will be an increasing priority, as confirmed by [our survey of health insurance providers](#).

"Increasingly, webshops all look the same. Businesses are therefore relying on their brands for distinction. So, from a marketing perspective, it makes sense for Bol.com and Coolblue to consolidate."

Klaas Weima, *Energize*

Domain names increasingly important for trust

The days of typing domain names into browsers are long gone. Domain names nevertheless continue to play a big role in our internet use, mainly because we see them in search results. Half of consumers look at the domain when considering whether to trust an unknown website in a list of finds. Only reviews and quality assurance logos carry more weight.

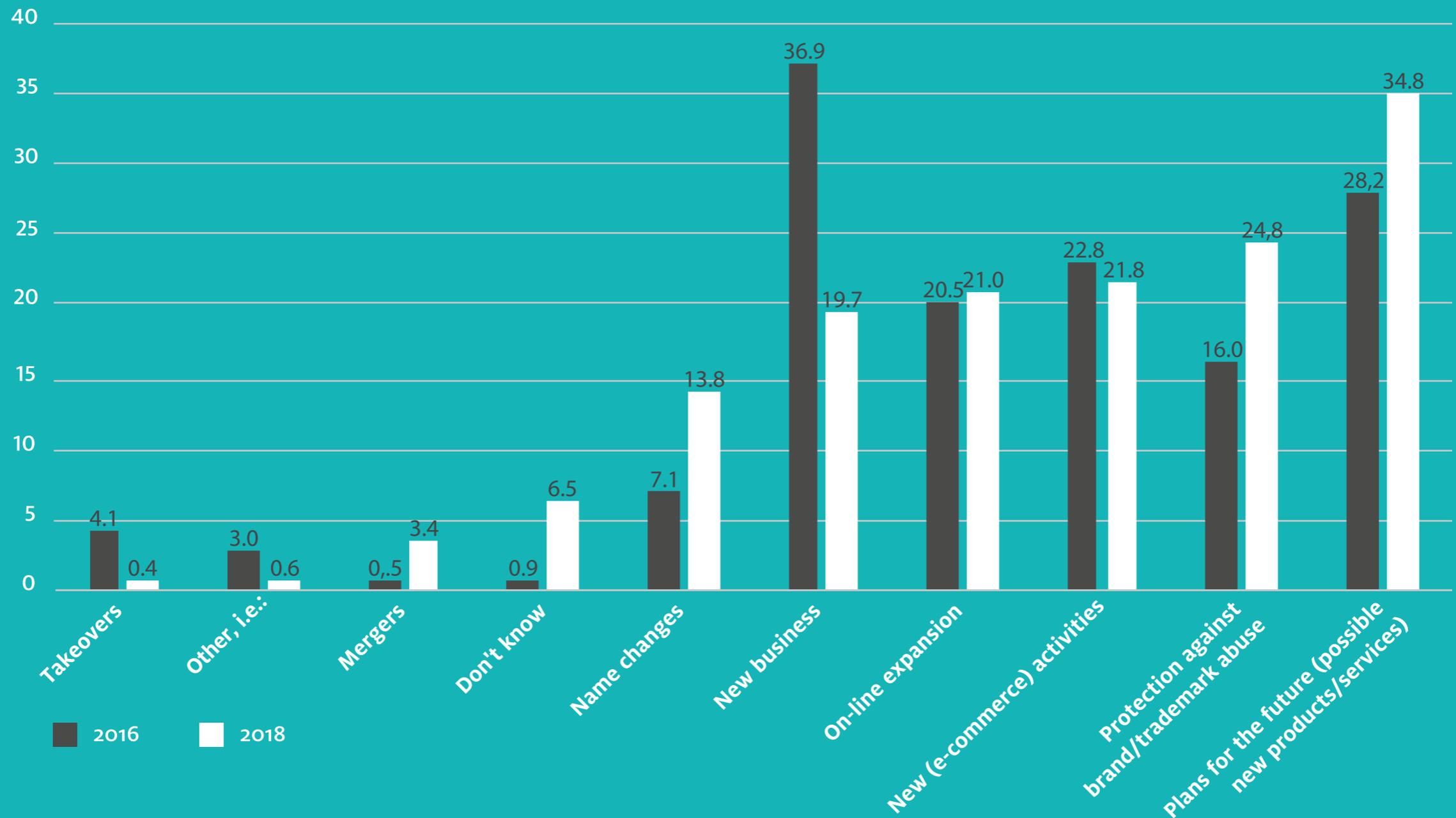
In the Netherlands, .nl domains are seen as the most trustworthy.

In fact, illogical though it may sound, Dutch internet users set more store by a domain's country code than by the country where a firm is based. So a Spanish webshop with a .nl domain name will often be considered more trustworthy than a Dutch rival with a .info address. A .info address is generally unhelpful in the Netherlands, because users have a very strong preference for .nl (Dutch context) and .com (international context).

Of course, searching and typing URLs are not the only ways to reach a domain: clicking a link is also well established, although riskier. The dangers associated with unknown links have received a lot of exposure recently, and the public has taken note: in 2014, 40% of people were accessing websites using links, but the figure is now down to 17%. Willingness to trust links has declined particularly sharply amongst young people.

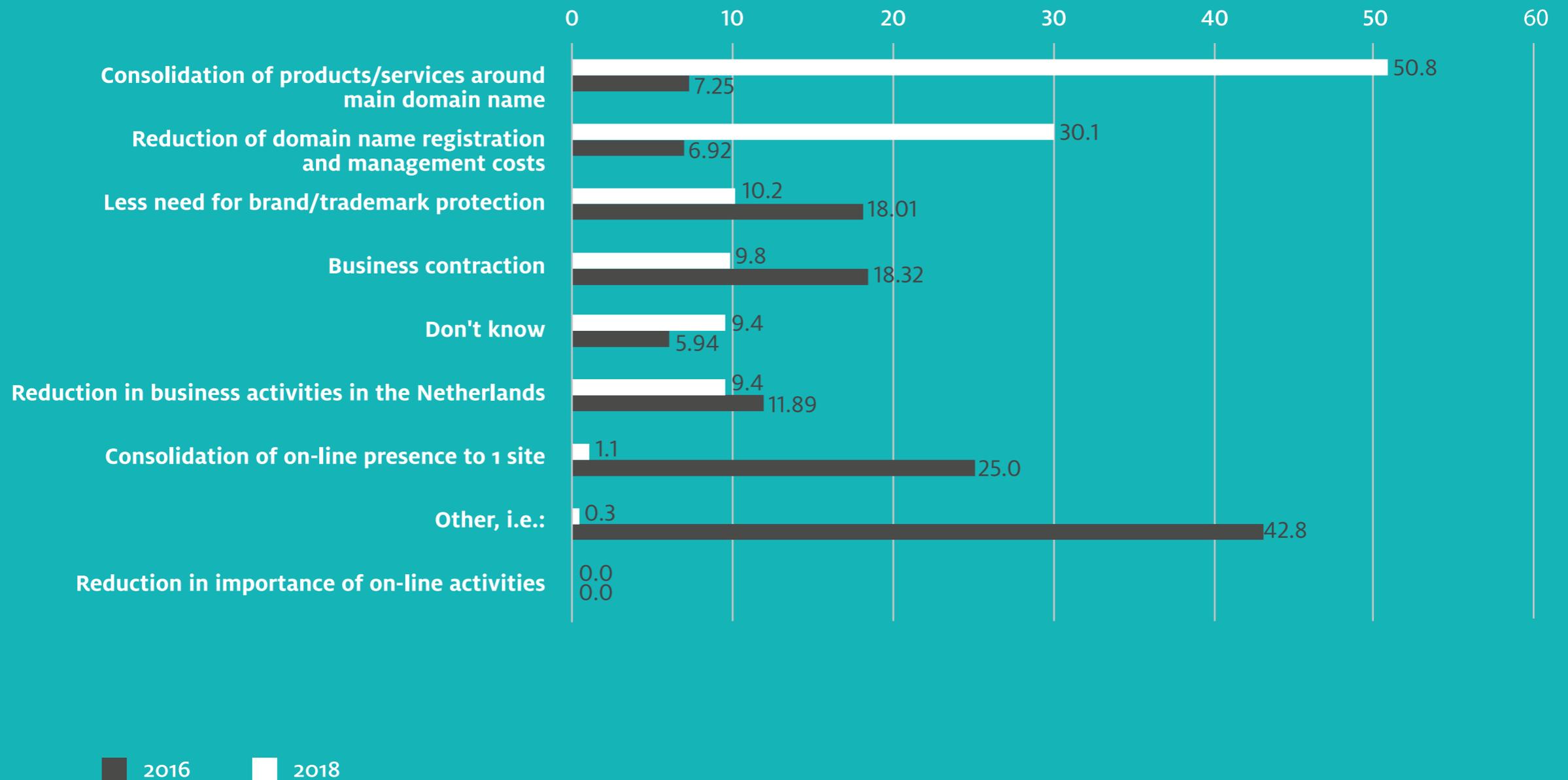
> Table 4: What's your preferred way of reaching a website?

Prospects for on-line business are good



Graph 4: Reasons for acquiring more domain names (Source: GfK, n=227)

From product to brand



Graph 5: Reasons for shedding domain names

Cautious approach to unfamiliar links

	2014 (in %)	2016 (in %)	2018 (in %)
I always type the domain name	53	39	38
I use favourites	31	20	19
I reach sites via a search engine (e.g. Google)	88	82	80
I use links on a portal site (e.g. Startpagina.nl)	13	7	6
I use apps	19	12	18
I click links in e-mails	30	17	17
I click links in social media (Facebook, LinkedIn, etc)	20	14	16
I type the first letters and let autocomplete do the rest		33	32
I use voice search (Siri, Alexa, Google Now, etc)			3

Table 4: What's your preferred way of reaching a website?

9 nTLDs remain peripheral

In 2013, a wave of new top-level domains (nTLDs) came on line. Despite the huge choice thus created on the domain name market, nTLDs continue to play a peripheral role. The best performers are .club and .xyz, both of which are patronised by just 7% of Dutch internet users. For .nl and .com, the corresponding figure is 100%.

Tabel 5: Reach of top-level domains, based on visits of >5 seconds

The nTLDs also struggle in terms of visit quality (i.e. duration): more than half of visits last less than five seconds. In other words, most visitors leave as soon as they see the extension.

In practice, however, nTLDs can be useful for reaching specific audiences. That's especially so with regional nTLDs, such as .amsterdam and .gent. Use of the .gent extension rose sharply, for example, after the popular Ghent festivals adopted the domain for their websites. Certainly in terms of reach and valuation, nTLDs appear to be effective for communicating with a (geographically) defined target group.

nTLDs remain peripheral

Top-level domain	Reach Q2 2018 (%)
.nl	100.0
.com	99.9
.net	80.1
.org	71.2
.eu	64.6
.be	55.4
.de	50.0
.nu	44.8
.info	42.7
.uk	35.5
.tv	27.3
.co	25.5
.io	24.5
.me	18.5
.fr	14.8
.fl	14.8
.it	14.3
.biz	14.1
.to	11.7
.cn	10.7

New top-level domain	Reach Q2 2018 (%)
.xyz	7.3
.club	5.4
.amsterdam	2.5

Table 5: Reach of top-level domains, based on visits of >5 seconds (Source: GfK Crossmedia Link/GXL)

10 Expert panel

On 18 October 2018, we presented our research findings to a panel of six experts and invited them to debate the implications. Although their backgrounds differ, our specialists share a passion for everything associated with the internet, mobiles and other devices. Their preoccupation is not so much with the technology itself, but with the way people use it



Jorij Abraham

Managing director of the Ecommerce Foundation

> [Read more](#)



Thea van der Geest

Professor of Media Design at Arnhem-Nijmegen University of Applied Sciences, Centre for IT and Media (CIM)

> [Read more](#)



Martijn Arets

Researcher, author, consultant, speaker and blogger, whose specialist subject is the impact of on-line platforms on our society

> [Read more](#)



Patrick Petersen

Senior online strategist, cross-media marketer, content marketer, internet entrepreneur, international speaker, lecturer and author

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Berend van Dalfzen

CEO of Realtime Register

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Klaas Weima

Founder and Managing Director of Energize

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Background expert panel

Jorij Abraham has been a member of the international eCommerce community since 1997. He has been E-commerce Manager at Bijenkorf and TUI, On-line Publisher at Sanoma Media and Director of Consulting at Unic. Jorij is also (co-)founder of two companies: eVentures Europe and vZine. From 2013 to 2017, he was Director of Research & Advice at Thuiswinkel.org and Ecommerce Europe. He is now Managing Director of the Ecommerce Foundation and Professor of E-commerce at Tio University of Applied Sciences.

Marijn Arets is a researcher, author, consultant, speaker and blogger, whose specialist subject is the impact of on-line platforms on our society. Through his own company, he has interviewed more than four hundred people in thirteen countries about the rise of the platform economy. Using the insights obtained, he advises stakeholders in the field. Martijn also writes and talks in the media about topical developments. On a part-time basis, he works at Utrecht University, doing research into the platform economy.

Berend van Dalfzen is CEO of Realtime Register, one of the biggest domain name registrars in the Netherlands. He also sits on SIDN Fund's Board of Governors. Berend knows the Dutch and international domain name industry inside out.

Thea van der Geest is Professor of Media Design at Arnhem-Nijmegen University of Applied Sciences, Centre for IT and Media (CIM). She is also Senior Researcher attached to the Centre for eGovernment Studies at the University of Twente. Thea heads up a research team working on the user-focused design of digital services - services that are accessible, attractive and easy to use for everyone.

Patrick Petersen is a senior online strategist, cross-media marketer, content marketer, internet entrepreneur, international speaker, lecturer and author. At university, his final study thesis was based on his own (content) marketing models. The models were later put to successful use for international organisations including Heijmans, Hästens, IKEA Nederland and MTV Europe. During additional master's studies at the London School of Business and Finance and Geneva Business School, he developed integrated models for targeted digital engagement and modern content strategy. He was named top content marketer by Bureau Meltwater.

Klaas Weima is founder and Managing Director of Energize, a creative marketing agency that helps ambitious brands generate the attention they deserve. He is also author of the books Webvertising and Verdiende aandacht, which was nominated for the PIM Marketing Literature Award. Klaas has a regular column in Adformatie and blogs for Marketingfacts. For ten years, he has hosted CMOTalk, a podcast in which chief marketing officers get their teeth into topical marketing issues. In addition, Klaas holds visiting professorships at NIMA, the Rotterdam School of Business and Nyenrode Business University.

11 Conclusion: strong globalisation and growth continu

We are living in the era of the smartphone. Smartphones dominate internet use in the Netherlands, and that translates into numerous brief website visits and intensive use of a small number of apps. It's also clear that users want fast results and are increasingly happy to look abroad. A company's location makes little difference, with consumers relying more on reputation and a site's domain name.

Businesses are predominantly positive about their internet operations and domain name portfolios. They expect growth on both fronts, which will mean opportunities for the internet industry. However, the industry also needs to be alert to changing customer needs: corporates are increasingly opting to consolidate specialist webshops under the banner of a single brand, with a view to reinforcement and expansion.

Opportunities therefore abound for businesses active in this field. On-line brand protection, faster hosting packages and international propositions are just some of the promising avenues. Any forward-looking business is also well-advised to look at voice technology. While the mechanisms remain unclear, the experts are unanimous in believing that voice control is sure to take off in the years ahead.

Colophon

This document summarises a research report compiled for SIDN by GfK.
The following people worked on this summary:

GfK

Henk Delfos – Industry Lead
Sandra van Dijke – Business Analyst

SIDN

Michiel Henneke – Marketing Manager
Marnie van Duijnhoven – Communication Manager

Tekstwerf

Martijn Thurkow – Copywriter

If you have any questions about the research, please mail
communicatie@sidn.nl

SIDN

P.O. Box 5022
6802 EA Arnhem
Meander 501
6825 MD Arnhem
The Netherlands
T +31 (0)26 352 55 00
www.sidn.nl