THE COMMERCIAL DEVELOPMENT OF ccTLDs IN THE LAC REGION

Report in the framework of the ICANN LAC Strategy Project 4.6.1
'Strategies for ccTLDs in the new commercial environment'

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Executive summary

The ccTLDs in Latin America and the Caribbean are performing well. Their growth doesn't come as a surprise given the booming Internet use in the region.
The number of 'Internet users' is still relatively low in almost all LAC countries and will continue to increase.
Surprisingly the ccTLDs in the region show signs of a declining growth. Five years ago, a growth rate of 15% and more was not exceptional; today, in most ccTLDs the year over year growth has fallen under 10%.

ccTLD registries must understand the challenges they face: the competition from new gTLDs; the existential threat posed an Internet where apps, social networks and instant messaging allow users to use the Internet without website and email addresses; and the unsure loyalty of domain holders.

This report is part of the larger project 'Supporting the Commercial Development of ccTLD Registries in the Latin American and Caribbean Region' lead by LACTLD, and sponsored by ICANN in the framework of the 'ICANN Strategic Plan for Latin America and the Caribbean'.

The report analyses the challenges and provides building blocks to develop strategies for ccTLDs in this new commercial environment.
Collecting statistics to get a better insight in the own zone file and to understand the dynamics behind the changing growth will help registries to plan their strategy and react adequately on changes. Raising awareness, branding and developing the sales channel helps to maximize the number of new registrations. Abolishing unnecessary rules, lifting restrictions and choosing the right price have proven to have a positive effect on the number of registrations and eventually on the registry's revenue. Domain holders who effectively use their domain name are more loyal, and therefore should get special attention in the ccTLD's strategy.

The last part of the report is a checklist for individual registries to be used when they develop or refine the strategy for their ccTLD. The report's conclusions contain suggestions for further work on a regional level, more concretely to stimulate the collection of statistical data to better follow and predict trends and allow registries to benchmark their performance; to improve the communication and cooperation between the registry and its (potential) sales channel; and to better understand the loyalty of a domain holder and what drives the decision to register, renew or delete a domain name.

I. Introduction

This report is the outcome document of the project 'Supporting the Commercial Development of ccTLD Registries in the Latin American and Caribbean Region' lead by LACTLD, the Latin American and Caribbean ccTLD organization[1] and sponsored by ICANN in the framework of the 'ICANN Strategic Plan for Latin America and the Caribbean'[2] (project 4.6.1).

In line with the overall objectives of the project to support the registries in the LAC region with developing a commercial vision and strategy for their ccTLD, this report:
(a) maps the ccTLDs in the LAC region and gives an insight in the current state of the Latin American and Caribbean ccTLD market;
(b) looks at the challenges and the opportunities for ccTLDs in the LAC region;
(c) formulates strategic options and choices to help registries developing and refining the commercial strategy for their ccTLD.

The description of the ccTLD landscape in Latin America and the Caribbean is largely based on historic data from the LACTLD database and new data collected in collaboration with LACTLD.
The findings of the data analysis fed into a *LACTLD Marketing workshop*[3], organized on 20 June 2015 in Buenos Aires, where they were used to kick off a discussion on the challenges LAC ccTLD registries face and a brainstorming on opportunities and strategic choices.
The discussion at the LACTLD workshop contributed to the second part of the report.

The author of the report is *Wim Degezelle,* Internet policy analyst & consultant (DUERMOVO), who has more than 10 years' experience in the Domain Name Industry and ccTLD Community.

Methodological note: LAC and LACTLD

The geographical scope of the project 'Supporting the Commercial Development of ccTLD registries in the Latin American and Caribbean Region' is Latin America and the Caribbean.

The analysis in this report is limited to the membership of LACTLD. The organization has a tradition of collecting data from its members and without LACTLD's support and access to this data, it would be extremely difficult to collect sufficient and consistent information on the ccTLDs in the region.

Most ccTLDs in Latin America and the Caribbean are a member of LACTLD.
All the ccTLD registries in Central America and, with the exception of three[4], all the South American ccTLDs are member of LACTLD. Eight ccTLD registries from the Caribbean region are member of LACTLD.

The different countries of which the ccTLD is a member of LACTLD cover a population of roughly 570 million or 93% of the inhabitants of the Latin American and Caribbean region. In geographic terms one can say that the LACTLD membership covers 100% of the population in South America, 91 % of the population in Central America and 88 % of the population in the Caribbean.

1 www.lactld.org
2 http://icannlac.org/EN/strategic-plan.php
3 https://www.lactld.org/en/news/taller-comercial-de-lactld-20-de-junio-de-2015-buenos-aires-potenciando-la-vision-comercial-hacia-el-desarrollo-del-cctld/

4 .fk (the Falkland Island – pop. 3k) .gf (French Guiana – pop. 230k), .sr (Suriname – pop 531k)

Figure 1 The LACTLD membership (as on June 1, 2015)

South America	Central America	Caribbean
Argentina .ar	Belize .bz	Anguilla .ai
Bolivia .bo	Costa Rica .cr	Aruba .aw
Brazil .br	El Salvador .sv	Cuba .cu
Chile .cl	Guatemala .gt	Curaçao .cw
Columbia .co	Honduras .hn	Dominican Rep .do
Ecuador .ec	Mexico .mx	Haiti .ht
Guyana .gy	Nicaragua .ni	Puerto Rico .pr
Paraguay . py	Panama .pa	Trinidad and Tobago .tt
Peru .pe		
Uruguay .uy		
Venezuela .ve		

Based on these observations it was decided to focus on the LACTLD members and make the assumption that the evolutions and challenges found within the LACTLD membership are a good reflection of the reality in the LAC region.

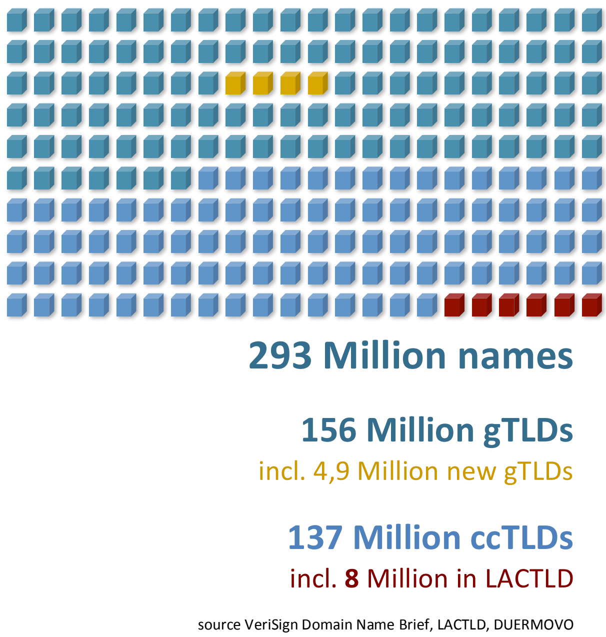
II. ccTLDs in Latin America

1. Global TLD distribution

There were 293 million domain names registered at the end of the first quarter of 2015. The gTLDs accounted for 156 million registered names, or 53% of all registered domain names worldwide.
The remaining 137 million domain names, or 47%, were registered in the different ccTLDs.

At the end of the first quarter of 2015, there were 8 million domain names registered in one of the ccTLDs that are a member of LACTLD.
Put in a global perspective this means that 2.7% of all the domain names and 5.8% of all ccTLD names in Q1 of 2015 were registered under one of the LACTD country codes.

Figure 2 Distribution of registered domain names at the end of the first quarter of 2015



2. Organization of the Registry

The large majority of the ccTLD registries in the LACTLD region are *not for profit* organizations. In a survey from 2012, only 2 out of 19 registries answered that they were for profit.[5]

Traditionally, many ccTLDs developed as a part of an *academic institution* or within an *academic network*. A recent survey amongst the LACTLD members confirmed that these academic affiliations still exist in at least one out of three ccTLDs (over 30% of 15 respondents in Nov 2014).[6]
Another group of ccTLDs is related to or a part of the *Government or Regulator* (12% in the same survey).
The others were organized as different types of *associations* or as *private companies*.

Where the ccTLD is part of a larger structure or organization, the peculiar function of registering domain names and maintaining the national DNS infrastructure has often a limited impact on the organization's overall mission and goals (for example, the main functions of a university are research and education).

The not for profit character of most ccTLDs and the fact that many registries are embedded in a government or academic environment has often limits the freedom that the TLD manager has to take decisions and develop an independent commercial strategy for its ccTLD.

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[5] LACTD A-Level survey 2012
[6] LACTLD Report ccTLDs and National Legislation in Latin America and the Caribbean, November 2014

3. Domain Registration price

The price of a domain name in a ccTLD from the LACTLD region is different from TLD to TLD, and extremes exist on both sides.

Several ccTLDs are relatively expensive and charge, converted into dollars, within the range of 50 USD, 100 USD or more per year for one domain name.
Most registries in the region set the price for a one-year registration between 10 and 50 USD.
A few registries charge less than 10 USD per year. [7]

As a comparison, the maximum price a registrar pays to VeriSign for a one-year .com registration is 7.85 USD per domain.

These general observations, however, hide a complexity of prices and price structures that are used by several registries in the region.

Figure 3 Grounds for price differentiation used by ccTLDs in LACTLD

Sales	Direct or via a registrar
Registration	At 2nd Level, at the 3rd level
Nationality	Registrant inside or outside the country
Type of sub-level	eg . reserved for commercial entities

- direct versus wholesale price:
The wholesale price charged to a registrar is usually lower than the price that a registrant pays if he registers his domain name directly with the registry. This is common practice in many ccTLDs around the world, with sometimes, huge differences between the direct and wholesale price.
Some registries might give volume discounts to large resellers and registrars, but such details are usually not shared.

- 2nd level versus 3rd level registrations:
The registries that offer the possibility to register a domain name directly under the top level (*name*.xy) and under one or more second level domains (*name*.xyz.xy), charge in general more for the registrations directly under the top level.
Some registries have different options within the third level and charge different prices (for example *name*.com.xy domains for businesses or *name*.org.xy domains for not for profit organizations).
- national versus international price
There are a few registries in the LACTLD region that charge a higher price for domain names registered by registrants from outside the country.

A few ccTLD registries in the world have a two-letter code that can be commercialized on an international or global scale, because the two-letter combination has an own meaning next to being official abbreviation of a country name.

Does price matter? In 2008, M. Zook concluded, based on an analysis of 5 years of registration data from 21 European ccTLDs, that the demand for domain names is sensitive for price changes 'when price tends to be relatively high'.[8] A similar, tough less outspoken link was found for some ccTLDs in the APTLD (Asia Pacific) Region.[9]

Given the fact the price for a domain name in a majority of the ccTLDs in the LACTLD region is relatively high, the aforementioned research suggests that it is still possibilities to use the price tool to influence demand.
The experience of the .gt registry supports this conclusion and shows what could be the effect of a price change. ".gt has lowered its fee twice in history, the last time in 2007, with the immediate result that the number of

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[7] based on LACTLD Statistical survey 2015; data LACTLD Secretariat 2015; overview of the LAC ccTLD pricing by the .gt registry

[8] Analysis of Factors of Demand for Domain Names in CENTR Member Registries, Matthew Zook, June 2008, Link (.pdf)

[9] Study of the Factors Behind the Demand for Country Code Domain Names, Matthew Zook, October 2007, link (.pdf)

new registrations doubled in the same year. The initial decrease of income (-30%) for 2007 was gained back by 2009."[10]

Early 2015, LACTLD asked its members if they were planning to change their price within following 12 months. Four registries answered that they would decrease the price to register a domain name, two indicated that they plan to increase their price and five registries answered that they weren't expecting any price change in 2015.[11]

4. ccTLD policies

Several registries in the LACTLD region have more or less stringent requirements in place for the registration of domain names.
Some ccTLDs will only allow to register a domain name if one or more of the following requirements are fulfilled:

- the registrant can prove a physical presence in the country (private person);
- the registrant is a company registered in the country;
- one of the contacts has a postal address inside the country;
- the domain holder has a national tax ID;
- the administrative contact resides in the country;
- the registrant has a postal address in the country.

Such requirements make it difficult or impossible for foreign registrants to obtain a domain name.

Some registries have policies that require registrars to be established in the country or have an official local presence.
The cost and complexity to obey to such requirements can make a foreign registrar decide that it is no longer interesting to become an accredited registrar and sell the ccTLD to its clients. The smaller the ccTLD and potential market, the quicker a registrar will lose interest.

Not surprisingly, abolishing local presence requirements is high on the wish list of foreign registrars that want to offer Latin American and Caribbean ccTLDs in their portfolio. Some registrars decided to become a reseller because it was impossible or too costly to become accredited with the registry. Or as one registrar put it in a recent LACTLD Registrar Survey: 'If we are unable to become an accredited registrar due to the restrictions of the registry we will become a reseller. (…) but an own accreditation is highly preferred.'[12]

The existing restrictions on domain name registrations and requirements for registrars might be policy choices by the registry, and as such relatively easy to change, but it is also possible that they directly or indirectly result from local or national rules and laws which makes it difficult, if not impossible, to make changes.

5. Sales channel

Direct registrations with the registry, whether or not via a network of resellers, are (still) the main channel to register a domain name in the LACTLD region.

7 of the 27 ccTLDs in the LACTLD region work already with registrars and another 4 registries are planning or preparing the implementation of the registry-registrar model[13].
ccTLDs where it is not possible to register a domain name directly with the registry or where the number of direct registrations is negligible compared to the total number of registrations, are an exception.

[10] quotation provided by the .gt registry (A. Reynoso)
[11] 2015 LACTLD Statistical survey
[12] LACTLD Registrar survey Spring 2015
[13] LACTLD research June 2015, R. Puente

However, the picture is different if one looks at the number of registrations. Two of the three largest ccTLDs in the LACTLD region only accept registrations via registrars. The third one uses both sales channels but indicated that roughly 15% of all its newly registered domain names in 2014 came via the registrar channel.[14]

Based on this information and the LACTLD domain counts it is easy to estimate that in absolute numbers the registrar channel is an important sales channel for the LACTLD region. As more registries are planning or preparing to move to a registry-registrar model, the importance of the registrar channel will grow.

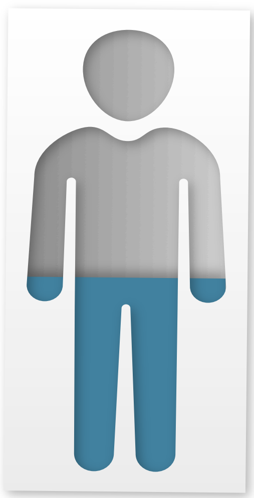
[14] 2015 LACTLD Statistical Survey

II. LAC – a region with potential

1. Growing Internet Use

More and more people are getting online. The group of Internet users in the LACTLD region has grown fast, from 5% of the population aged 16-74[15] in the year 2000 to 43% in 2013.

Figure 4 43% in the age group 16-74 are using the Internet - UN Data for 2013, LACTLD region



There are important regional differences. The Internet penetration is the highest (79%) in Aruba, the lowest in Haiti (11%).[16]
In all countries the Internet use has known a steady growth and is expected to continue to grow in the years to come.

There is empirical evidence that shows that 'as countries increase their use of the Internet (particularly commercial utilization), demand for domain names expands alongside this growth.'[17]
The Internet in Latin America and the Caribbean is expected to continue to follow this growth path, which means that there are opportunities for the ccTLDs in the region.

2. TLDs in the LAC region

a. TLD growth

Since the introduction of the DNS the number of registered domain names has grown continuously.
In what follows we will look at the evolution of the total number of registered domain names under gTLDs, ccTLDs and ccTLDs in LACTLD between end 2008 and end 2014.

Absolute growth
Between the last quarter of 2008 and the end of 2014 (6 years) the total number of registered domain names has increased with 63%, from 177 million to 288 million.
At the end of 2014 there were 111 million domain names more than at the end of 2008; 48 million more gTLD names and 63 million more ccTLD names.
So, between 2008 and 2014, globally more ccTLD domain names were added than gTLDs names.

The total stock of domains of LACTLD ccTLDs more than doubled in this period and grew with 4.4 million names from 3.5 million at the end of 2008 to almost 8 million by the end of 2014.

The global ccTLD growth slowed down around the year 2009/2010 due to a high number of deletions under .cn after the Chinese registry changed its policy.

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[15] The UN statistics count the population aged 16-74 as potential Internet users.
[16] By means of comparison; the following countries are amongst the top in terms of Internet penetration in the age group 16-74 in 2013 (UN Data): Iceland (97%); Norway, Sweden and Denmark (95%); the Netherlands (94%); UK (90%); UAE (88%); Japan, Canada (86%); Qatar, Rep. of Korea (85%).
[17] Analysis of Factors of Demand for Domain Names in CENTR Member Registries, Matthew Zook, June 2008, [Link](.pdf) (.pdf)

Relative growth

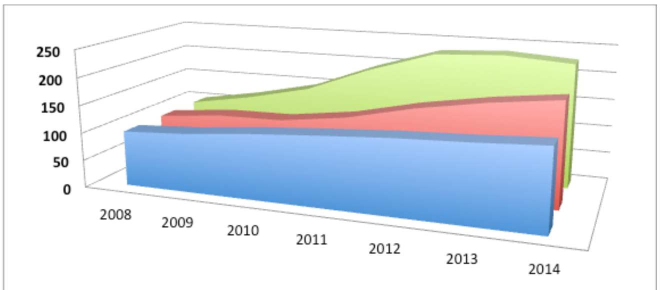
Between the end of 2008 and the end of 2014 the gTLDs grew with 45%, from 106 million to 154 million and the number of ccTLD names with 89%, from 71 million to 134 million.

So, also in relative terms the ccTLDs did better than gTLDs between 2008 and 2014.

But it is the group of ccTLDs in the LACTLD region that wins in this comparison. The LACTLD ccTLDs grew in this six-year period with 126% from 3.5 million registrations to 8 million, which is higher than the %growth of all ccTLDs together and the %growth of the gTLDs.

In the graph below the total number of registered domain names are indexed for the year 2008 (4th quarter domain counts). This allows to visualize the higher %growth of the ccTLDs in the LACTLD region compared to ccTLDs overall and gTLDs.

Figure 5 Comparing growth - Indexed number of registered domain names in gTLDs, ccTLDs and ccTLDs in LACTLD (year 2008 = 100) (Q4 domain counts)



	2008	2009	2010	2011	2012	2013	2014
gTLDs	100	107	118	126	134	139	145
ccTLDs	100	111	113	128	155	175	189
LACTLD cctlds	100	120	146	191	229	234	226

ccTLDs per Internet User

The number of Internet users aged 16-74 in the LACTLD countries has grown and the number of registrations in the LACTLD ccTLDs has grown.

In a sample of 16 on 22 countries also the number of registered ccTLDs per Internet user in the country has increased.

That the number of registrations per user increases, while the number of users grows, is another indication of the strong growth of the LACTLD ccTLDs.

However, with an average[18] of 14 domain names per 1000 Internet users and only 9 countries in the region with more than 10 registrations per 1000 users; the region lags behind compared to for example the top European countries with penetration rates of 355 (.nl/Netherlands), 272 (.ch/Switzerland), 244 (.de/Denmark), 235 (.de/Germany) or 184 (.uk/United Kingdom)[19] [20].

This is another observation that leads to the conclusion that there is a huge growth potential for LACTLD ccTLDs.

b. ccTLD/gTLD penetration

One of the ways to express the strength of a ccTLD is to compare the number of registrations with the number of gTLD domains that can be attributed to the country code's geographic area.

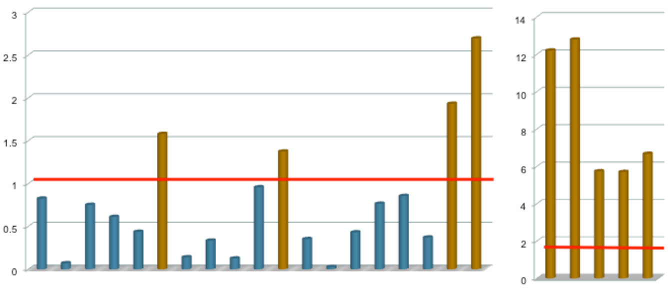
In the graph below, the bars show, per country, the number of ccTLDs in relation to the number of registered gTLD names. The red line in the graph (= value 1) means that for each ccTLD domain there is a gTLD domain registered in the country. The higher the bar, the stronger is the position of the ccTLD.

[18] n=24 (not included .ai, .cw, .pr, .bz)

[19] data CENTR Domain Wire Stats 2015/1; CENTR calculates penetration on the total population; the ccTLD penetration rates for the Internet users will be slightly higher.

[20] *Note*: the available data used to calculate the ccTLDs per Internet user in a country; doesn't allow differentiating between domain names registered within the country and names held by registrants outside the country.

Figure 6 Number of registered names in the local ccTLD per gTLD registration in the country (LACTLD data 2014)



One immediate observation is that there is a group of five countries (right graph) where the local ccTLD has a very strong position. There are over five times more registered ccTLD names than gTLD registrations attributed to the area.

The overall picture is less positive, only in 9 of the 24 countries in the graph, there are more ccTLD domains than locally registered gTLDs. In 4 countries the ccTLD scores very low.

Some caution is needed when interpreting the ccTLD/gTLD comparison: the number of gTLD registrations per country is an estimate[21] and is not an exact count based on registrant data. On the other hand the total number of registered ccTLDs does not differentiate between domain names held by registrants within and outside the country. As a consequence a high score of the local ccTLD can be the result of the strong position of the ccTLD inside the country but can also be influenced by a high volume of registrations outside the country.

However, in at least 3 of the 5 countries in the right graph the high score is the result of the dominant position of the national ccTLD within its own country.

c. TLD growth trends and expectations

Overall, as discussed in the sections above, the ccTLDs in LACTLD have known a strong growth during the recent years. In this section we will look how this growth is evolving. This analysis is based on a sample of 21 ccTLDs for which full data is available for the period 2008-2014[22].

The table below sorts the number of LACTLD registries according to their year over year growth.

Between 2008 and 2014 the majority of the ccTLDs have known a double-digit yearly growth. Many of them grew even more than 20%.

There's a sudden shift, starting in 2014, where the majority has a growth under the 10% and the registry with a growth of more than 20% has become the exception.

Figure 7 ccTLD registries in LACTLD counted according to their year over year growth

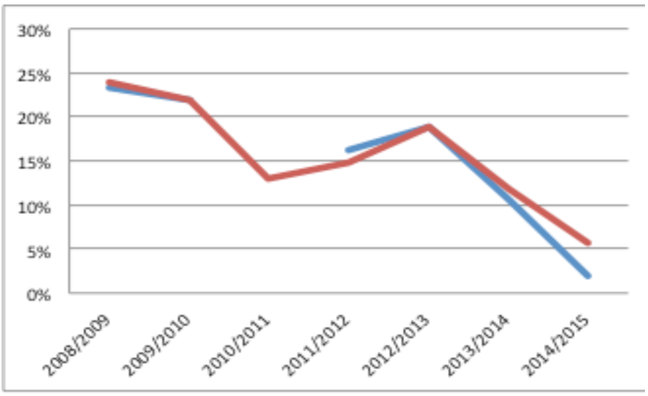
#registries sorted by Year over year growth	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
≥ 20 %	11	11	4	6	7	1	1
20% > ≥ 15%	4	3	8	5	5	0	0
15% > ≥ 10%	3	3	3	4	4	6	1
10% > ≥ 5%	0	2	3	4	2	10	8
5% > ≥ 0%	2	2	1	2	1	1	8
negative	1	0	2	0	2	3	3

The graph below shows the average year over year growth. The blue line is the average growth of the 21 ccTLDs. The data point for 2010/2011 is not included; its value of 128% lays high outside the graph's frame. This extreme value is mainly the result of the re-launch of the .co domain.

Figure 8 Average growth rate of ccTLDs in the LACTLD region (blue line = sample of 21 ccTLDs / red line without .co and .ar)

[21] Based on measurements by Zooknic

[22] Data source LACTLD; based on domain counts Apr 2015, June 2014, June 2013, for the other years the exact month is not known.



Both lines, with or without extremes, confirm the trend that was visible in the table: a declining growth from 20% and more towards an average growth between 5 and 10%.

d. Declining growth: less new registrations and more deletions – a scenario for the future?

A steadily growing number of Internet users, and ccTLDs where there is still much room for growth are two ingredients for a successful and carefree future for the registries in the LACTLD region. However, the previous section confronted us with declining growth rates. What is going on? What can be expected for the future?

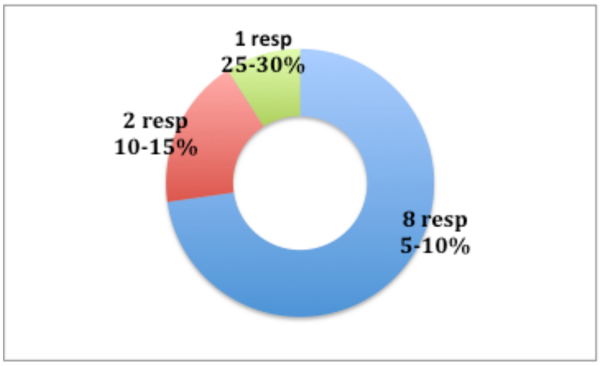
The French registry (AFNIC) studied the dynamics of domain creations (new registrations) and deletions between 2009 and 2014[23] and concluded for the TLD market as a whole and for gTLDs and ccTLDs separately that 'all other things being equal, the level of deletions should reach and exceed the level of creations in 2017'. At this point, when for each newly registered domain name a domain name gets deleted, the ccTLD stops growing and if the trend continues, becomes smaller.

The prediction that the year 2017 will be the moment of consolidation is based on averages, 'some registries were already in this situation in 2014 and others may only be affected by it after 2017'.

Given the declining growth in many of the LACTLD ccTLDs, it is worth to investigate if this trend is visible in Latin America and the Caribbean.
Unfortunately, at the time of writing, there is not enough historic data available to make a similar extrapolation of the evolution of deletions and new registrations for the LACTLD region.

There is data available for 11 registries on the deletions and new registrations in 2013 and 2014.
In nine registries there were more deletions in 2014 compared to 2013. However, only in four registries this increase in deletions went together with a decrease in new registrations.

Figure 9 Registries and their 2015 growth expectations (source LACTLD 2015 Stats survey, n=11)



Most registries in the LACTLD region expect a 5-10% growth for 2015; a similar growth as they experienced the year before.
Of the 11 ccTLDs in the sample, two increased their growth expectations compared to 2014 and one expects a lower growth.[24]

[23] May 2015 AFNIC French Domain Name Industry Report; https://www.afnic.fr/en/resources/publications/french-domain-name-industry-report/2015-online-edition/2017-year-of-consolidation-for-the-domain-name-market-1.html

[24] LACTLD Statistical survey, Spring-Summer 2015 (n= 11 registries)

The registries that participated in the brainstorming session at the LACTLD Commercial workshop (June 2015) shared the view overall the LACTLD ccTLDs will continue to grow in 2015 at a similar rate as last year.

III. Challenges and Strategic considerations for LAC ccTLDs

1. A sustainable growth

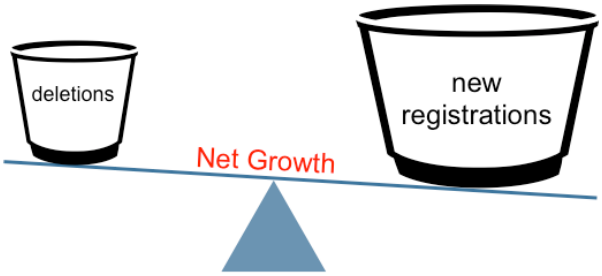
For years, most ccTLDs have been used to see their total number of registrations grow. Growth – and for some double-digit growth – became the standard. The new registrations are the direct driver behind this growth.

Each year, a percentage of the domain names are deleted, for various reasons. These domain names have to be compensated by new registrations to keep the size of the ccTLD stable. Only the remaining new registrations enable the registry to grow (the net growth).

In many registries the high number of new registrations goes together with relatively high renewal rates and a lower percentage of deletions.

A strategic vision, aiming at the sustainable growth needs to take into account both sides of the equation.
New registrations are important as they create growth. Deletions are important as they cannibalize growth.

In the past, with growth percentages of 20% and more, not much attention was given to deletions or to strategies to stimulate domain holders to keep their domain names. Now that growth percentages are lower it has become more important to have a clear insight in the growth and to think which side of the equation needs the most attention.
The correct answer is definitely both!



2. Challenges

The Internet and so today's environment for ccTLDs has changed. Where 15 years ago a ccTLD could sit back and watch its zone grow, today registries have to become active players to assure that they stay in the market.

(a) Alternatives
With the launch of new gTLDs a number of direct alternatives present themselves to potential registrants and existing ccTLD holders. Some of them target specific categories or registrants, registrants from a specific region or city, or want to be an alternative for .com.

We have seen that in some countries the local ccTLD has a strong position compared to the gTLDs. Will they be able to keep this position? In other countries the market share of the local ccTLD is much lower than the market share of the gTLDs. Will these ccTLDs be able to keep and increase their market share?

The ccTLD is not longer alone in its territory with only a few gTLDs. The ccTLDs need to position themselves in between the alternatives. ccTLDs have a unique selling point as the official two letter abbreviation of their country. But this is just a start. To be able to compete with its alternatives it must be possible and as easy to register (sales channel!) the ccTLD name at a competitive price.

Some ccTLDs might decide to broaden their market and look for opportunities outside their own country. A good working and international sales channel will be important for them. But they'll also have to keep an eye on possible restrictions in their rules that might hinder registrations from abroad and they have to be able to receive international payments.

(b) Changed use of the Internet
Not only the Domain market has changed, also the Internet and the way in which people access and behave online has evolved. The future might look bright but if all the new Latin American Internet users that come online connect via their mobile devises, exclusively use apps and only communicate via their social networks it is unlikely that they will register a domain name.
The challenge for registries will be to raise awareness and teach the Internet users about the benefits of having an own domain name. Creating a demand might sound strange in the ears of many ccTLD registries, but raising awareness, explaining why they are unique and how they can be used is what many new gTLDs are doing at the moment.

(c) loyalty
The third challenge is minimizing the total number of deletions. How can a registry avoid that domain holders delete their domain name? How to create loyal registrants? One of the answers is: if users use the domain name (for example for email or a website) they will think twice before deleting it.

In the following section we will develop different action points that help in dealing with these challenges.

(d) Small number of players in the LAC ecosystem
The low number of local registrars, the few ICANN accredited registrars from the region (22 registrars in LAC, compared to 154 in Asia and 144 in Europe)[25] and limited interest so far of international and global registrars to be active in the region is often mentioned as a sore point for the region.
The question 'how to attract international registrars?' will be addresses in the next section.

3. Developing a commercial strategy – Action points

ccTLD registries in the LACTLD region are different from each other in size, history, development, organization form, and their not-for profit or commercial character.

The challenges they face, are similar, regardless their differences. The ccTLDs in LACTLD have higher growth percentages than the ccTLDs in general and the legacy gTLDs. Nevertheless, the global tendency of a declining growth is also noticeable in the LACTLD region.

The number of registered domain names directly influences the registry's revenue.
Domain registrations are the main source of income, and for many registries the sole source of revenue. The registrations need to cover the registry's operational costs, investments, and what remains is a surplus to invest in the not-for-profit goals or is the organization's profit. A commercial approach, which aims at a sustainable growth, is therefore relevant for the for-profit as well as for the not-for-profit registries.

What follows is a checklist, which registries can use when developing or refining their

[25] as on 22 April 2015, according to the *'Descriptions and Contact Information for ICANN-Accredited Registrars'*, link

commercial strategy. It is divided in four tracks:

(i) Understand your zone and the dynamics behind changes;
(ii) Know and develop the product;
(iii) Stimulate new registrations;
(iv) Encourage loyalty.

(i) Understand the zone and its dynamics

A commercial strategy needs to be based on facts. Data will tell, black on white, what is happening with a ccTLD. *Is there growth or not?* If not, there is a problem.
A data-analysis will gives the registry manager an insight in what is happening in his zone, help him to identify the causes, to formulate answers and decide on actions. Over a longer period, data will make it possible to see trends and predict what is coming.

A thorough insight in the own data enables a registry to *detect*, to *predict* and to *decide on action*.

The list of questions that can be answered from the registry's own databases is almost endless. The answers will help to make strategic choices and decisions.
Some examples:

- Growth: Is there growth?; What is the trend?; What is expected? Are there seasonal effects?; …
- New registrations: Increase? Decrease? Who is registering?; …
- Deleted names: Increase? Decrease? Who is deleting? Who is most loyal?, …
- Registrant: Who is holding a domain name? (private persons, SME's, companies, …); …
- Sales channel: Which channel is most used?; Which registrars perform well? Are there changes in the registrar's activities?; ….
- Domain use: Is there content?; Used for email?; Parked?; …

The impact of actions and the effectiveness of strategies need to be assessed, evaluated and adapted if needed. Also here, clear and accurate data is indispensable.

All the registries have the information, but not all use it.
Collecting data uses resources and requires discipline. A staff member needs to collect the data, store and analyze it. This is not a one-time project, but a recurring task (eg weekly or monthly). Especially in smaller registries with a limited number of employees this might be challenging.
Alternatively, several external providers offer services and tools to extract and analyze data from the zone file and the whois database. These of course come with a cost for the service or the tool's license.

A panel of specialists at the LACTLD Marketing workshop (June 2015) agreed that every registry should at least collect the following statistics on a regular (monthly) basis:

total number of registered names;
new registrations,
deleted domains,
renewals.

This information will enable the registry to detect changes, predict trends, and react when needed.

Collecting data takes time and requires discipline, but is not an impossible task. One of the panelist advised smaller registries to start collecting this basic data on a monthly basis in a simple spreadsheet. Updating the spreadsheet is not such a burden if it's done every month.

(ii) Product:

The domain name registration is the registry's product (or service). A commercial

strategy should start from a thorough analysis of this 'product'.
For many ccTLD registries it might feel strange to take this commercial approach and think of domain name registrations in terms of offering a 'product' to potential buyers.

Since the creation of the DNS, not much has changed to the concept of a 'domain name' (a human readable string used to identify one or more IP addresses). There are no major innovations in the pipeline that will fundamentally change what a domain name is.
It can be enlightening to brainstorm on the following questions:
- *What is the product I'm selling?*
- *What makes it different from the available alternatives?*
- *Why should a potential registrant choose for a (this) ccTLD?*

Geographical (national) versus generic
A ccTLD is the Internet Top Level domain corresponding to the official two-letter abbreviation of a country[26]. This makes a ccTLD 'unique' and creates an added value compared to alternative TLDs.
Most ccTLDs define themselves as the national TLD. For them this unique national link is an important characteristic, which they can use as selling argument.

Alternatively, a ccTLD can choose not to focus on this geographical link. As mentioned before, not all two-letter codes lend themselves to be used in a generic way on a global scale.

2nd level or 3rd level registrations
Registries offer registrations on the 3rd level or directly under the top level (or a combination of both). The decision to do it one way or another was made in the past. Registries should be prepared to reconsider this structure against the current environment and their commercial strategy. A change might create new opportunities.

Some observations:
- *there is a general trend to make domain names as short as possible;*
- *in the recent years several ccTLDs that were only offering registrations on the 3rd level have opened the second level;*
- *the new gTLDs in general only offer registrations directly under the top level.*

New products and features
The concept of a domain name has not changed. Some registries have developed additional features and services to sell together with the domain name. A good example are the extra protection or 'registry lock' services that prevent domain hijacking and unauthorized transfers. They are offered by for example .mx , .eu, .com , .se , .ca.
Other registries help domain holders and right holders to monitor and handle typosquatting[27]. Registries can decide to charge for such additional services or offer them for free to make their ccTLD more attractive.

Note: many registries are offering and developing services in parallel with the registration of domain names, mainly to diversify their business and be less dependent on domain names for their revenue. Some examples are hosting, registry services, identity services, consultancy, registrar services, …

(iii) New registrations:

New registrations are the source of growth for a ccTLD. A registry can take actions on

[26] There are no .IDN ccTLDs in the LACTLD region, therefore the old difintion of 2-letter country abbreviations is still valid for the region.

[27] For example: https://www.sidn.nl/diensten/dbs?language_id=2

different levels that directly or indirectly support new registrations.

Awareness raising

In a world with mobile Internet, social networks, competition from (new)gTLDs, ccTLD have to invest in awareness raising.
Potential registrants need to be made aware that ccTLDs exist and why registering a ccTLD name is useful. Many new gTLDs put a lot of effort in promotion and awareness raising. Awareness campaigns bring domain names under the attention. ccTLDs can indirectly benefit from this, if they can position themselves as the better alternative.
For this the registry needs a clear and strong brand. For the registrant, registering a ccTLD must be as easy as registering the gTLD and the price must be competitive.

Awareness raising and increasing the ccTLD's visibility, some examples:
- Explain what a ccTLD is and why it is useful. (Campaigns, social media activities, … that show how a ccTLD can be used);
- Position the ccTLD as a better alternative (eg highlight its geographical link);
- Increase the visibility and raise the profile (eg by approaching government, banks, national and local tv, radio and newspapers – organization that are well known, active, well-respected –to register <u>and use</u> a ccTLD.)

Registration process and Sales channel

Registering a ccTLD must go as easy and fast as registering an alternative. The Internet is synonym for fast, 24/7, paperless and real-time. Registering a domain name should be alike.
A good working sales channel is key for a ccTLD.

Direct registrations

If direct registrations are still an important sales channel – as is the case in many LACTLD ccTLDs – registering a domain has to be easy and done in a few clicks.
The registry's site must guide registrants to the registration tool or form, without them having to look for it (for example via a direct link when somebody looks up an available domain name). The process should be paperless.
For international registrations, the tool must be available in different languages and the registry has to be able to accept international payments.

Registry – Registrar model

Deploying a registry-registrar model is an intense process but in the end the benefits of an active and good working registrar network outweigh. What follows is a list of actions points that help a registry to creating and maintain a national and international registrar channel. In the current landscape a registrar can choose which TLDs he wants to offer.
Via a survey and panel discussions we got an insight in what makes a ccTLD interesting for registrars.

The following list of do's and don'ts focuses on attracting international registrars. Many are interested in the growing Latin American market to sell new gTLDs. It's an opportunity and a must for the local ccTLDs to be part of their portfolio.

Accreditation

- *Have a Registry-registrar model in place.*
- *Avoid requirements that prevent or put extra burdens on registrars*
  (Local presence requirements, the need of a local address or a local representative.)
- *Have a translated version of Registry-Registrar contract and documentation.*

Registration procedure

- *Have a paperless procedure.*
- *Organize the ccTLD life cycle similar to gTLDs.*
- *Have a transparent invoice and payment system.*
- *Be able to receive (international) bank transfers.*

- *Have an EPP or real-time API (for all processes)*
- *Provide clear technical documentation in English (Commands, Extensions, error codes, …)*
- *Charge a competitive price.*

Communication

- *Have a clear and open communication between registry and registrar.*
- *Announce policy and technical chances or promotions well in advance.*
- *Work together on outreach.(stimulate the registrar to do part of the outreach)*
- *Pricing*
- *Inform the sales channel with statistical performance data.*

Restrictions

Rules and restrictions such as a maximum number or registrations, are putting limits on the number of new registrations.

A ccTLD might have (had) good reasons for some of the rules and limitations. Existing limitations and rules should be reconsidered from time to time to check if they still (need to) serve the cause they were intended for. If not, they probably are only slowing down the ccTLD's growth.

Price & Promotions

Several ccTLDs in LACTLD charge a relatively high price. Choosing a competitive price is not the same as going for 'the lowest' price.

It is important to identify the main alternatives to the own ccTLD and their price.

Price promotions can help to trigger new registrations. In a registry-registrar model, where the registry has little or no influence on price the end user pays, a price reduction can be used as an incentive for registrars to promote your ccTLD during a certain period (eg by putting it higher on the list of suggested names or make some extra promotion). To get registrars easily on board, it is important to announce the promotion well in advance (so that they can include it in their marketing plans); make the period of the promotion long enough; and listen to their feedback and input (use the registrar's experience with price promotions).

The success of a promotion largely depends on what happens the year after: how many names are renewed. This might require additional follow up, an maybe an new promotion to avoid that too many of the names are not renewed.

(iv) Retention / loyalty:

Increasing the loyalty of domain holders, in other words minimizing the number deletions, is important for the stability and the future of the ccTLD.

Domains must be used

Domain names that are used for content or email are less likely to be deleted. Moving content to a new site, reprinting business cards, informing your network of your new contact details are just some of the consequences (costs) of changing the domain name used for a website or email.

Campaigns can encourage people to use their domain name or focus on those potential registrants that are most likely to use their name for email or a website (for example SME's, organizations, …).

Multiyear registrations

More and more registries offer the possibility to register a domain name for two, five, ten or more years. Multiyear registrations avoid that holders can delete the domain name every year and have therefore a stabilizing effect on the zone.

Conclusions & Way forward

(1) The continuing growth of the Internet in Latin America, in terms of usage and number of users, creates possibilities for the ccTLDs in the LACTLD region to grow.
(2) The rise of competitors (new gTLDs) and the indirect threat of alternative ways to use the Internet (apps, instant messaging, …) undermine this growth potential.
(3) ccTLD registries need to adapt their strategies and (pro-)actively face these challenges.
(4) A commercial strategy is in the benefit of the ccTLD; regardless of whether the organization is for profit of not for profit; and of whether it aims at maximizing profit/surplus or at recovering the cost of running the national TLD.
(5) Although all registries face the same challenges, there are huge differences between the registries in the LACTLD region (size, model, number of employees, organization form, national characteristics, …) and each registry will have to analyze its own local environment and develop its own strategy.
(6) Registrars and resellers can become important partners for a ccTLD registry.

The 'check list' in the last section of the report provides action points that inspire registries when developing or refining their commercial strategies. Even though each ccTLD has its own characteristics, the challenges are similar and it therefore workshops and brainstorming sessions where experiences are shared are very important.

Also on a regional level some further steps could be useful:

(a) Joined database of key registry data.

The data used for this report did not allow confirming, refuting or predicting a consolidation of the LACTLD ccTLD market. The amount of data that is needed to discover and predict such trends is not very complex. Within LACTLD, members could commit to provide a small set of data (the number of new, deleted, renewed and registered names) on a regular basis (monthly or bimonthly).

Such a database will allow members to:

- get a real-time insight in the market; discover trends; predict evolutions.
- benchmark their ccTLD against the general trend and against ccTLDs of similar size and characteristics.

For registries that are not yet collecting and analyzing data on a regular basis, the commitment to provide the data will stimulate them to maintain the effort.

(b) Stimulate the communication and cooperation with registrars/resellers.

Registries and registrars benefit from a good communication and cooperation. It enables them to know each other, understand each other's situation, solve issues and discuss opportunities for cooperation.
It might be useful for registries to have:

- An overview of all registrars that are active in the the LACTLD region;
- Information on how and who to get in touch with at the registrar to discuss cooperation;

On the other hand, an overview of the LACTLD registries with basic information, up-to-date and direct contact information would make it easier for registrars to get in touch with the registries.

(c) Further research and insight in how domain names are being used

i. How is a domain name used? (type of registrant, content or no content, …)
ii. Why is a registrant registering a new domain name?
iii. For what reason is a domain name deleted?
(And: 'is a deleted domain name replaced by a domain name under another TLD?')

Research into the reasons why a domain is registered or deleted is complex. Ideally one should ask the domain holder directly to motivate his action.

Alternatively an analysis of the characteristics of the names that are registered or deleted, the domain holder and information on how the domain name is or was use will allow some educated guesswork.
Registrars and resellers are closer to the end user and have their own ideas on why domain names are registered or deleted. Their opinions would be very valuable.

Annexes and tables

1. Countries and country codes in Latin America and the Caribbean

Country	ccTLD	registry	sponsoring org	ICANN REGION
Caribbean				
Anguilla	**.ai**	Register Anguilla Domain Names	Government of Anguilla	EUR
Antigua and Barbuda	**.ag**	NIG.AG	UHSA School of Medicine	LAC
Aruba	**.aw**	NIC AW	SETAR	EUR
Bahamas	**.bs**	BSNIC	The College of the Bahamas	LAC
Barbados	**.bb**	TelecomsUnit	Government of Barbados	LAC
Bonaire, Sint Eustatius and Saba	**(.bq)**	not assigned		
British Virgin Islands	**.vg**	nic.VG (run by KSregistry)	Telecommunications Regulatory Commission of the Virgin Islands	EUR
Cayman Islands	**.ky**		The Information and Communications Technology Authority	EUR
Cuba	**.cu**	Cuba NIC	CENIAInternet	LAC
Curaçao	**.cw**	.CW Registry Curacao	University of Curacao	EUR
Dominica	**.dm**	DotDM Corporation	DotDM Corporation	LAC
Dominican Republic	**.do**	NIC Do	Pontificia Universidad Católica Madre y Maestra.	LAC
Grenada	**.gd**	nicGD (run by KSRegistry - Alexander Siffrin/KeySystems)	The National Telecommunications Regulatory Commission (NTRC)	LAC
Guadeloupe	**.gp**	nic.gp	Networking Technologies Group	EUR
Haiti	**.ht**	NIC HT	Consortium FDS/RDDH	LAC
Jamaica	**.jm**		University of West Indies	LAC
Martinique	**.mq**	DOMeNIC (registry for .gf, .gp, .mq)	MEDIASERV	EUR
Montserrat	**.ms**	.MS	MNI Networks Ltd.	EUR
Puerto Rico	**.pr**	NIC Puerto Rico	Gauss Research Laboratory Inc.	NA
Saint-Barthélemy	**(.bl)**	not assigned		
Saint Kitts and Nevis	**.kn**	KNNIC	Ministry of Finance, Sustainable Development Information & Technology	LAC
Saint Lucia	**.lc**	NIC.LC	University of Puerto Rico	LAC
Saint Martin (French part)	**(.mf)**	not assigned		
Saint Vincent and the Grenadines	**.vc**	NIC.VC	Ministry of Telecommunications, Science, Technology and Industry	LAC
Sint Maarten (Dutch part)	**.sx**	SX Registry SA B.V.	SX Registry SA B.V.	?
Trinidad and Tobago	**.tt**	TTNIC	The Trinidad and Tobago Network and Information Center	LAC
Turks and Caicos Islands	**.tc**	NIC.TC	Melrex TC	EUR
United States Virgin Islands	**.vi**	NIC.VI	Virgin Islands Public Telcommunications System	NA

			c/o COBEX Internet Services	
Central America				
Belize	**.bz**	NIC Belize	University College of Belize.	LAC
Costa Rica	**.cr**	NIC Costa Rica	Academia Nacional de las Ciencias	LAC
El Salvador	**.sv**	SvNET	Asociación SVNet	LAC
Guatemala	**.gt**	NIC GT	Universidad del Valle de Guatemala	LAC
Honduras	**.hn**	NIC HN	Red de Desarrollo Sostenible	LAC
Mexico	**.mx**	NIC México	NIC México	LAC
Nicaragua	**.ni**	NIC Nicaragua	Universidad Nacional de Ingeniería	LAC
Panama	**.pa**	NIC Panamá	PANNET/Universidad Tecnológica de Panamá	LAC
South America				
Argentina	**.ar**	NIC Argentina	Secretaría Legal y Técnica - Presidencia de la Nación	LAC
Bolivia (Plurinational State of)	**.bo**	NIC Bolivia	Agencia para el Desarrollo de la Sociedad de la Información en Bolivia.	LAC
Brazil	**.br**	Registro BR	Comite Gestor da Internet no Brasil.	LAC
Chile	**.cl**	NIC Chile	Universidad de Chile	LAC
Colombia	**.co**	.CO Internet S.A.S	CO Internet SAS	LAC
Ecuador	**.ec**	NIC EC	NIC.EC	LAC
Falkland Islands (Malvinas)	**.fk**		Falkland Islands Government	EUR
French Guiana	**.gf**	DOMeNIC (registry for .gf, .gp, .mq)	Net Plus	EUR
Guyana	**.gy**	Guyana top level domain	Centre for Information Technology (CIT), University of Guyana	LAC
Paraguay	**.py**	NIC Paraguay	Universidad Nacional de Asunción	LAC
Peru	**.pe**	NIC Perú	Red Científica Peruana	LAC
Suriname	**.sr**	Register.SR	Telesur	LAC
Uruguay	**.uy**	NIC UY	SeCIU - Universidad de la República	LAC
Venezuela (Bolivarian Republic of)	**.ve**	NIC VE	CONATEL	LAC

Source: LACTLD, IANA, ICANN

2. LACTLD membership: Country and population

LACTLD membership – country & population

	Population UN mid-year est. 2013 in thousands *LACTLD members*	Total population in region / ***% in LACTLD***
South America		405,853
.ar Argentina	41,660	
.bo Bolivia	*10,426*	
.br Brazil	201,033	
.cl Chile	17,557	
.co Columbia	47,121	
.ec Ecuador	15,775	
.gy Guyana	747	
.py Paraguay	6,783	
.pe Peru	30,475	
.uy Uruguay	*3,357*	
.ve Venezuela	30,155	
	367,595	***91%***
Central America		162,145
.bz Belize	350	
.cr Costa Rica	4,718	
.sv El Salvador	6,289	
.gt Guatemala	*14,362*	
.hn Honduras	*8,046*	
.mx Mexico	118,395	
.ni Nicaragua	6,134	
.pa Panama	3,851	
	162,145	***100%***
Caribbean		41,863
.ai Anguilla	14	
.aw Aruba	106	
.cu Cuba	11,192	
.cw Curaçao	154	
.do Dominican Republic	10,258	
.ht Haiti	10,085	
.pr Puerto Rico	3,721	
.tt Trinidad and Tobago	1,318	
	36,848	***88%***
LAC	566,588	609,861
		93%

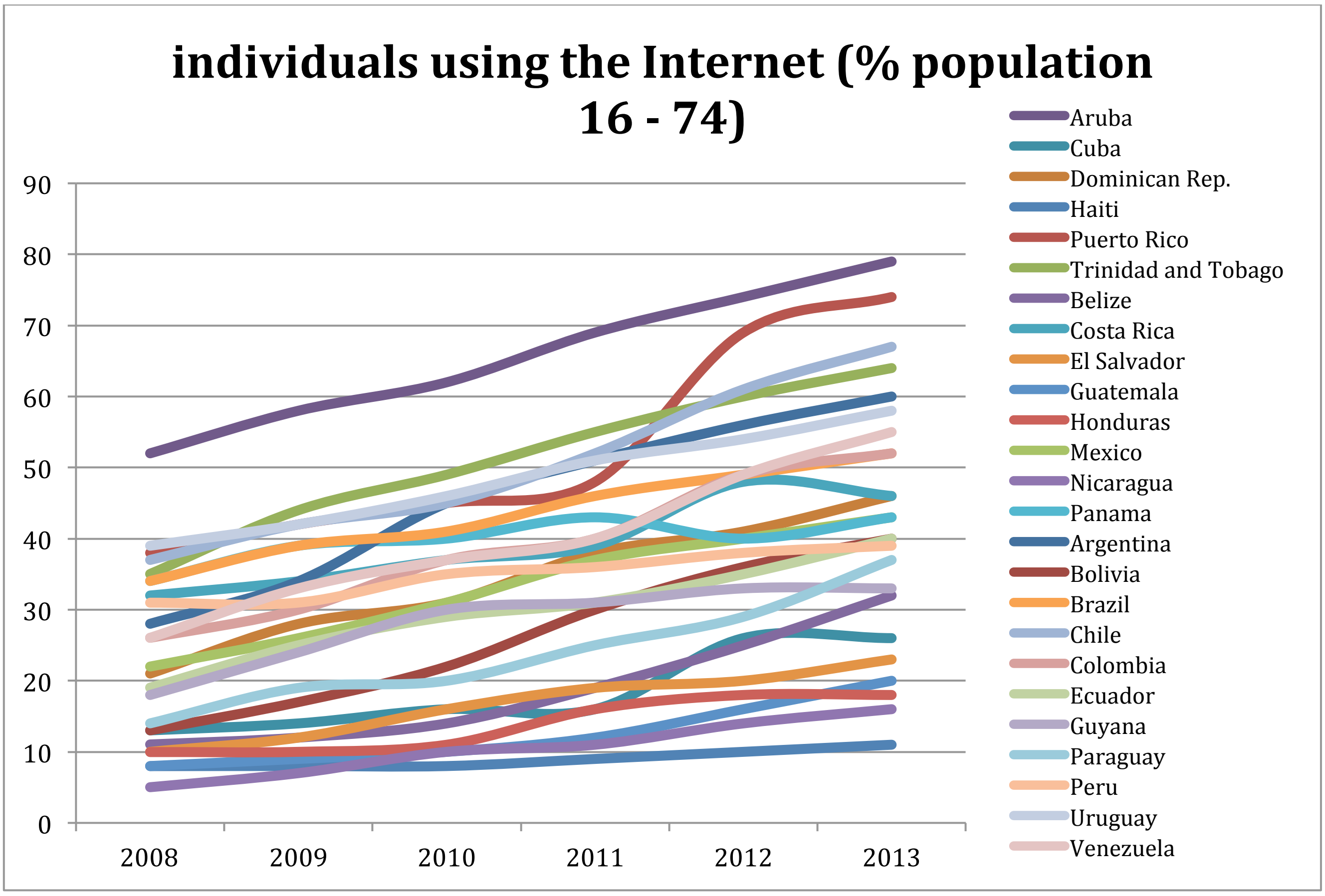
Source: UN mid-year estimates for 2013, where not available the estimates for 2010 or the UN stats based on the latest available census was used.
United Nations Demographic Yearbook 2013
http://unstats.un.org

3. Internet penetration in the LACTLD region

Individuals using the Internet in the LACTLD region

percentage of individuals using the Internet					
Country	**ccTLD**	**2013**	**2010**	**2005**	**2000**
Caribbean					
Anguilla	**.ai**	na			
Aruba	**.aw**	79	62	25	15
Cuba	**.cu**	26	16	10	1
Curaçao	**.cw**	na			
Dominican Republic	**.do**	46	31	11	4
Haiti	**.ht**	11	8	6	0,2
Puerto Rico	**.pr**	74	45	23	11
Trinidad and Tobago	**.tt**	64	49	29	8
Central America					
Belize	**.bz**	32	14	9	6
Costa Rica	**.cr**	46	37	22	6
El Salvador	**.sv**	23	16	4	1
Guatemala	**.gt**	20	11	6	1
Honduras	**.hn**	18	11	7	1
Mexico	**.mx**	43	31	17	5
Nicaragua	**.ni**	16	10	3	1
Panama	**.pa**	43	40	12	7
South America					
Argentina	**.ar**	60	45	18	7
Bolivia	**.bo**	40	22	5	1
Brazil	**.br**	52	41	21	3
Chile	**.cl**	67	45	31	17
Colombia	**.co**	52	37	11	2
Ecuador	**.ec**	40	29	6	1
Guyana	**.gy**	33	30	na	7
Paraguay	**.py**	37	20	8	1
Peru	**.pe**	39	35	17	3
Uruguay	**.uy**	58	46	20	11
Venezuela	**.ve**	55	37	13	3

Source: *World Telecommunication/ICT Indicators Database , ITU*
http://data.un.org


individuals using the Internet (% population 16 - 74)
90
80
70
60
50
40
30
20
10
0
2008
2009
2010
2011
2012
2013
Aruba
Cuba
Dominican Rep.
Haiti
Puerto Rico
Trinidad and Tobago
Belize
Costa Rica
El Salvador
Guatemala
Honduras
Mexico
Nicaragua
Panama
Argentina
Bolivia
Brazil
Chile
Colombia
Ecuador
Guyana
Paraguay
Peru
Uruguay
Venezuela

4. ICANN Accredited Registrars in the LACTLD region

The list of ICANN Accredited Registrars[28] counts 22 Accredited Registrars based in Latin America or the Caribbean (count Spring 2015) against for example 144 European Registrars, 26 in Canada and 23 in Australia and New Zealand together.[29]

ICANN Accredited Registrars in the LACTLD region (April 2015)

Country	**ccTLD**	**ACRs**
Caribbean[30]		
Anguilla	**.ai**	1
Aruba	**.aw**	-
Cuba	**.cu**	-
Curaçao	**.cw**	-
Dominican Republic	**.do**	-
Haiti	**.ht**	-
Puerto Rico	**.pr**	-
Trinidad and Tobago	**.tt**	-
Central America		
Belize	**.bz**	1
Costa Rica	**.cr**	1
El Salvador	**.sv**	-
Guatemala	**.gt**	-
Honduras	**.hn**	2
Mexico	**.mx**	3
Nicaragua	**.ni**	-
Panama	**.pa**	4
South America		
Argentina	**.ar**	2
Bolivia	**.bo**	-
Brazil	**.br**	4
Chile	**.cl**	-
Colombia	**.co**	-
Ecuador	**.ec**	-
Guyana	**.gy**	-
Paraguay	**.py**	-
Peru	**.pe**	-
Uruguay	**.uy**	-
Venezuela	**.ve**	-

[28] Descriptions and Contact Information for ICANN-Accredited Registrars (updated Wednesday, 22-April-2015) https://www.icann.org/registrar-reports/accreditation-qualified-list.html
[29] The number of ICANN Accredited Registrars in the US is more than 1k, but several registrars have multiple accreditations (up to several hunder for some).
[30] Bahamas, Barbados, the Cayman Islands and the Netherlands Antilles have one ICANN Accredited Registrar according to the list.

ICANN Accredited Registrars per country (April 2015)

Total number of ICANN Accredited Registrars per country (April 2015)			
Country	*number*	*Country*	*number*
United States	1134	Argentina	2
China	81	Belgium	2
Germany	28	Malaysia	2
Canada	26	Taiwan	2
United Kingdom	24	Ukraine	2
Australia	19	Anguilla	1
France	18	Bahamas	1
Korea (South)	17	Barbados	1
Japan	16	Belize	1
India	15	Bulgaria	1
Spain	13	Burundi	1
Netherlands	12	Cayman Islands	1
Sweden	9	Costa Rica	1
Hong Kong	8	Czech Republic	1
Italy	8	Finland	1
Russian Federation	8	Ghana	1
Turkey	8	Greece	1
Austria	5	Hungary	1
Brazil	4	Jordan	1
Denmark	4	Kuwait	1
Ireland	4	Latvia	1
New Zealand	4	Monaco	1
Panama	4	Morocco	1
Switzerland	4	Neth. Antilles	1
United Arab Emirates	4	Nigeria	1
Viet Nam	4	Norway	1
Indonesia	3	Pakistan	1
Israel	3	Philippines	1
Mexico	3	Poland	1
Singapore	3	Senegal	1
South Africa	3	Thailand	1
		Total	**1538**

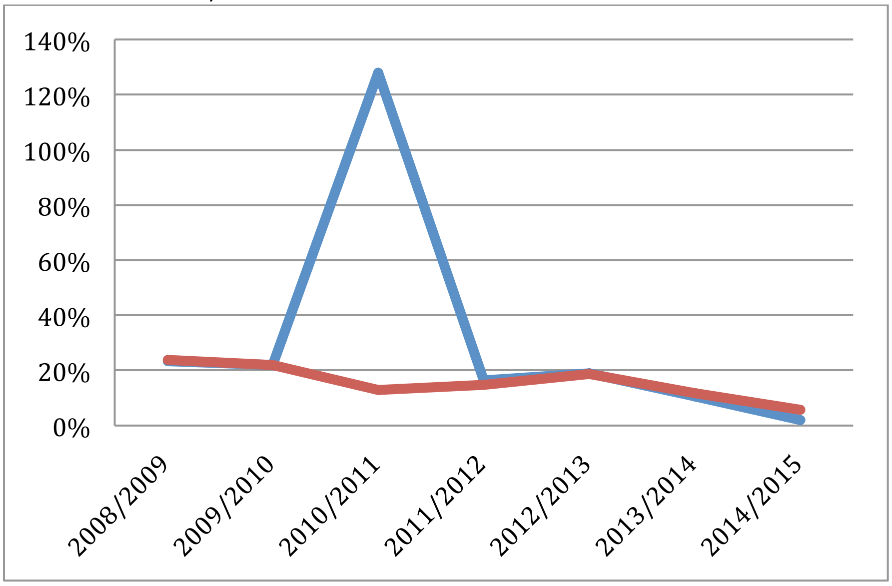
Source: DRMV count based on *Descriptions and Contact Information for ICANN-Accredited Registrars (updated Wednesday, 22-April-2015)*
https://www.icann.org/registrar-reports/accreditation-qualified-list.html

5. ccTLD growth – average growth rate ccTLDs in LACTLD

Average growth rate of ccTLDs in the LACTLD region (blue line = sample of 21 ccTLDs / red line without .co and .ar)

	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Average growth sample 21	23%	22%	128%	16%	19%	11%	2%
Average growth sample 19 (no .co, no .ar)	24%	22%	13%	15%	19%	12%	6%

Average growth rate of ccTLDs in the LACTLD region (blue line = sample of 21 ccTLDs / red line without .co and .ar)



6. ccTLD/gTLD penetration

Number of registered names in the local ccTLD per gTLD registration in the country (LACTLD data 2014)