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New gTLDs and the Global South

Understanding Limited Global South Demand in the Most Recent new gTLD Round and Options Going Forward

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Contents

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Project Goals and Assumptions

Despite extensive interest from numerous application groups in the global north during the recent round of new gTLDs, the round saw very few applications from developing nations. As part of the ICANN community's desire to understand this phenomenon AMGlobal Consulting was asked to look at potential applicants that might have been – companies, communities and others that did not apply whose profile mirrored those who applied – whether in or outside of developing regions.

Our task was to identify sample cohort companies and organizations, then reach out to them to get their feedback around the new gTLD program as industry leaders representing diverse countries and sectors – whatever their level of knowledge about the program or experience of the ICANN community. The goal was to understand the decisionmaking process in a very direct way, building data and context, basing our work on survey questions designed in conjunction with the CCRT reflecting questions and assumptions from the ICANN community.

From this information we have compiled a list of prioritized recommendations given by interviewees for the community – areas where they believed ICANN and the ICANN community could do more and more effectively reach out to potential applicants in the global south. And interviewees had strong opinions and some excellent recommendations, whether or not they had considered applying in this most recent round.

Finally, based on these recommendations we end with some final recommended courses of action. Not all of the priorities identified by the interviewees will be possible to address, and we recognize that no matter what a next round might look like or when it might begin, resources to reach new markets will be limited. We hope that the data and observations included below will help the CCRT and the wider community as they work to make smart, data and experience-driven decisions for a future round, decisions that will produce real value for the ICANN community in the global south and beyond.

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Structure of the Inquiry: Process, Challenges and Reflections

The overall program was divided into four phases of work:

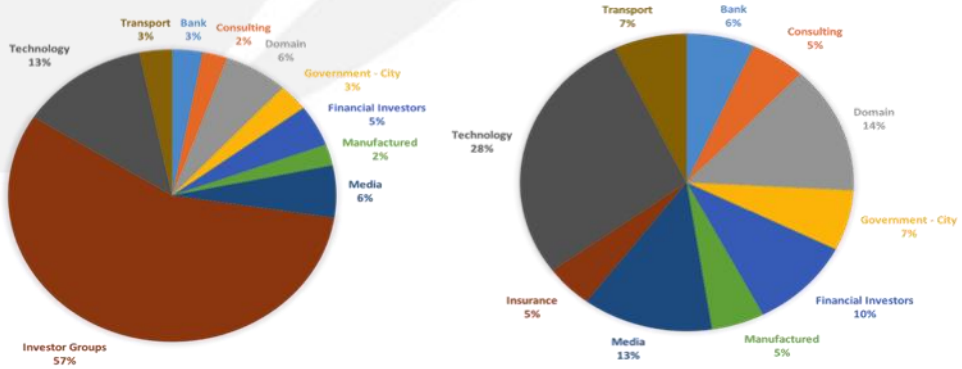
1. Initial evaluation of the applicants that DID apply – What kinds of groups, companies, communities and associations applied in the last round? Who within each type of organization were typically the decisionmakers responsible for final sign-off? *(Annex 1)*

2. Creation of a list of "analogues" in the global south – Target lists of similar companies and organizations for Africa/Latin America/Caribbean and Asia/Middle East, including contact lists for decisionmakers, with broad sectoral diversity and including some specific additions based on our knowledge of local preferences, culture and business. *(Annexes 2)*

3. In-depth interviews to at least 30 of these global south leaders – To understand their experience of the new gTLD program and get their advice for future potential rounds *(Annex 4 contains the questionnaire, Annex 5 the list of interviewees)*

4. Analysis and recommendations for ICANN

The analogue lists were compiled by analyzing leader companies and organizations in key markets across the global south. The analysis took into consideration local dynamics and the different distribution of sectors present between markets in the global south and global north. From this, we worked to assemble contact list for key decisionmakers and prioritized potential groups for outreach – a challenge considering how few of these individuals were easily accessible from online sources. The rough breakdown for the Latin America region (as an example) is as follows:



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The interview portion of the research followed these first tow phases, and was structured around in-language interviews of 30-60 minutes duration each, based on a questionnaire designed by AMGlobal and approved by the CCRT. From our conversations we rated our responses 1-5, with 1 denoting the most important or most significant concern or opportunity.

The questionnaire was designed to get in-depth data around four primary topics:

- **Awareness** – What did respondents know about the program? How did they know it? And how accurate was their information?
- **Constraints + Level of Interest** – What level of interest did interviewees and their organizations have? What issues did they see as concerns or constraints to moving forward? Did they believe a new gTLD would be interesting or appropriate for the markets in which they operate?
- **Uses for a new gTLD** – How did interviewees think of potentially using a new gTLD? What business models appealed to them as potential opportunities?
- **Advice for ICANN and the community** – What questions might still need to be answered in order for them to consider a new gTLD? What tools would help them with their decisionmaking? How could future outreach be enhanced?

Overall, we were extremely pleased with the results of the study and the data that came from our outreach. There were, of course, some challenges and limitations of the research:

i. The study is indicative, but not large. We knew from the outset that given the limited time and the desire to go deep with interviewees, our sample size would not be large enough to be statistically significant – something we discussed at length with the CCRT leadership. To address this issue we, chose to focus the bulk of our interviews in the Latin America region, giving us more depth and more data in that market and more comparable results. Interestingly, when we compare results from that region with other regions, we do see some striking commonalities in key messages, concerns and advice for ICANN and which we believe can help guide future action.

ii. We were unable to reach many interviewees we might have wanted. Many groups we contacted simply did not respond, with email approaches to potential respondents generally ignored. There were many potential reasons for this, but we were not generally surprised given:
    1. The general lack of context for the program and limited knowledge of ICANN

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2. The need to reach decisionmakers – by definition very busy people
3. Survey skepticism and an overall lack of urgency (since the round had finished and no new round is currently on the horizon)

We addressed this issue by working through our networks to ensure the best possible responses, being careful to look for the widest sectoral and organizational mix of responses.

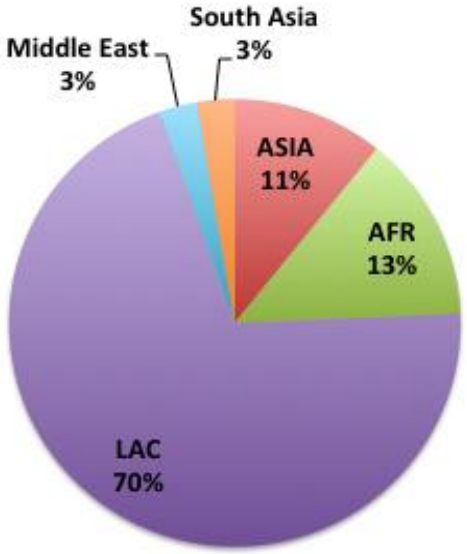
iii. The study is admittedly not complete geographically – some contacts in key countries like South Africa, Turkey and India are still outstanding and will be worth reaching out to in future.

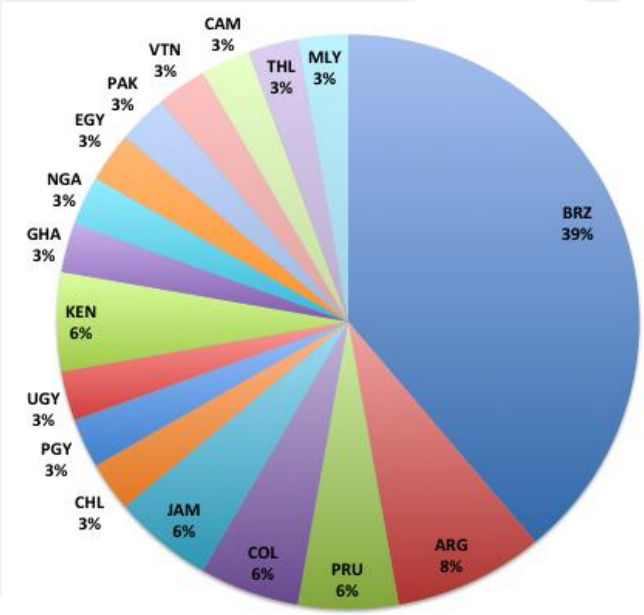
iv. Finally, the study is based on a snapshot of today and market dynamics change – the research provides important information about current global south attitudes, but the ICANN community will likely want to confirm attitudes and approaches as we get closer to any future round.

The interviewees

While our original goal had been to complete the study with 30 interviews, we were fortunate to get broad responses from a number of additional respondents, ending the study period with 37 completed interviews.

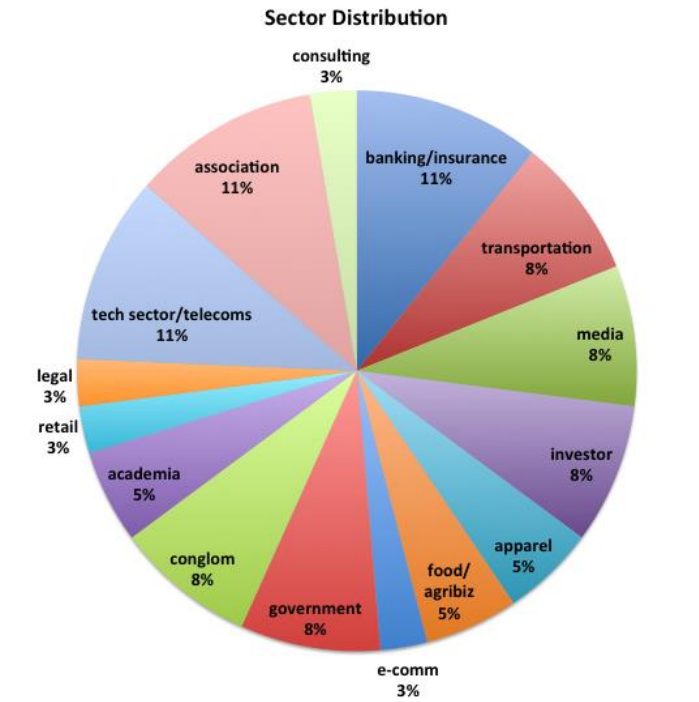
The interviewees broke down geographically as in the graph below, though a significant number of respondents emphasized that they have activities that are regional, or in some instances, cross-regional (though nearly all aimed at emerging markets).





Countries in detail are focused significantly on South America, with a large representation of the region's two largest markets, Brazil and Argentina – two of the countries with the largest number of groups and companies considered potential new gTLD-ready – but also containing leading countries from other countries in the region and other regions

The study team also reached out to a wide range of different sectors and types of organizations to get the broadest possible sense of perspectives on both interest and challenges.

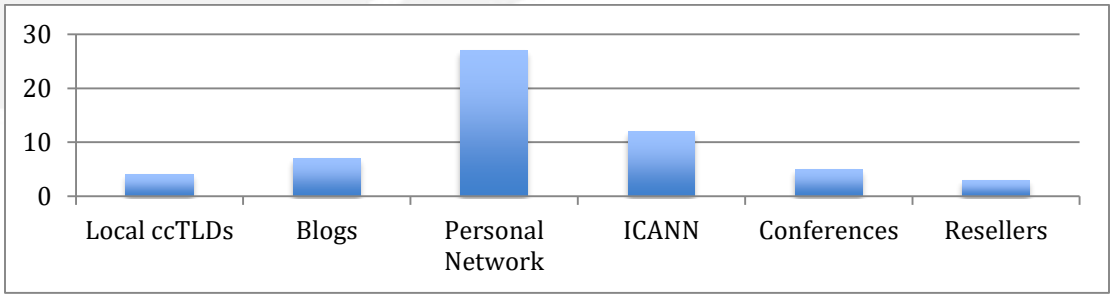


Importantly, it was nearly impossible to accurately capture "investor groups" that might have been assembled for the specific purpose of making an application. We spoke with a number of interviewees that offer advice – consultants, lawyers etc. – and their impressions are included, but we recognize that it would be impossible to fully capture the perspective of investors themselves.

Two categories – tech sector/telecoms and banking/insurance are admittedly broad. We included both groups as categories, based on the fact that they were asking some similar questions and considering they are often parts of similar networks.

How they got their information about the new gTLD program

Interviewees said by a wide margin that they received the information on this most recent round from two sources: their personal networks (19 cited this as their primary source, 27 mentioned over all) and the mainstream media (8 and 14). No other source came close, though there were a wide variety of sources mentioned.



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Overall Awareness of the Program and Constraints around Awareness

Limited awareness of the new gTLD program and unfamiliarity with ICANN was a key factor limiting participation, according to our interviewees. The level of knowledge of interviewees across the board was basic, with only around half of the interviewees (16 of 37) describing their level of awareness as high, and 12 – almost 1/3 of all interviewed – saying they had basic knowledge of the program, or none. Many interviewees who had heard "something" had no understanding of its connection to ICANN, and about a third of all interviewees had no knowledge of ICANN at all. Given the newness of the idea of new gTLDs in many emerging markets, this lack of context was a significant issue.

Limited Overall Awareness

Many who were aware of the program cited a lack of *complete* information and/or *clear communication* as key constraints to participation. Communications around the program were described by interviewees as "complicated" and "dense", and "more for insiders than for me or the general public". Information around program deadlines, application costs and longer-term costs were all cited as areas where info was either hard to understand or misunderstood. A number of respondents when describing what they knew about the program conveyed information that was simply incorrect or substantially incomplete. "I knew the application cost was high, I think over $1million, but it wasn't clear," said one applicant. One interviewee from Africa with exposure to ICANN and the DNS industry spoke for many when he said, in essence, "It sounded like an interesting idea, but I wasn't hearing enough from ICANN or the press to know whether it was worth pursuing." Inadequate info on the program of the program was mentioned by 30 of the 37 respondents as a constraint, with 10 of them ranking the lack of information as their #1 concern.

Lack of Complete, Accessible Information and

Finally, related to overall program information was the question of time, especially in Latin America. A number of interviewees admonished ICANN for providing information too late, providing inadequate time for decisionmaking. This was especially mentioned by large conglomerates and government entities, who suggested that they might need six months or more to fully explore, socialize and win approval for a new gTLD initiative. As a number of Latin American respondents suggested, it could take time to find the right home or champion within a large organization

Inadequate Time for Decisionmaking

for an initiative as new as a new gTLD. Time issues were cited by nearly 19 of the 37 respondents, with a whopping 11 citing this as their #1 constraint to participation. Many interviewees either heard too late, or said they simply didn't have enough time to fully explore the idea.

Lack of Clarity around Business Model for a New gTLD + Related Issues

A second, and equally important group of concerns centered around the lack of an obvious business plan for a new gTLD. This issue was cited by nearly every single respondent across regions and sectors – 31 out of 37 – though others (citing time or information concerns which were often the first issues raised) ranked this issue somewhat lower on aggregate (only 9 respondents said this was their primary or secondary driver). Most interviewees assumed they might use a new gTLD for internal purposes – either as "their online brand"/to connect with customers or for use with internal networks, but seemed unclear about how they might structure a new gTLD and why it was urgent to move forward. Responses such as "I'm not sure how this helps us", or "What will we get out of a new gTLD" were common. One association leader interviewed summed up the business model dilemma well: "I'm not sure what success looks like for a new gTLD, and until I have a clearer idea, I can't see moving forward to get one."

No proven business model to follow – and in some cases, no obvious business model

Related to business model, a number of applicants across different regions – and especially in Asia and the Middle East – also cited concerns about customer confusion as a major constraint to moving forward with an application. They wondered if customers would understand and use a new gTLD and expressed concern about the impact of a new gTLD on search engine optimization (SEO). There were also a number of interviewees who mentioned the cost of promoting a new gTLD to their community or customer base. "We already have an online presence," said the CEO of one conglomerate. "I'm concerned that we'll only complicate the relationship with our customers if we move to get our brand as a new domain extension."

Concerns about Customer Confusion

Finally, there was a general sense among many interviewees that the timing simply wasn't right – yet – for new gTLDs in their regions. In some cases there was the sense that a new gTLD might be too far out in front of the marketplace. "We're still a pretty conservative country in terms of

Timing and Market Readiness

business," said one Peruvian executive. "I'm not sure a new gTLD would be taken seriously, and in any case, we're not going to be the first mover." A number of interviewees also cited the need for greater public awareness. "If we were to look at getting an extension like a .Swahili", noted one Kenyan tech investor, "I'm pretty sure that 99% of the people we'd want to be part of that community wouldn't know what I was talking about. We'd need to educate them AND then sell the names." Market readiness was mentioned by 19 respondents, though interestingly, none mentioned this issue as a #1 constraint.

Costs and Process Complexity

Application Costs and Longer-term Running Costs

Price and longer-term running cost were important issues to many interviewees. Though many of the interviewees believed their organizations could make the kind of investment needed, almost none had a clear sense of the real costs involved in applying for or running a new gTLD and many felt the cost was just too high for them or potential applicants like them. "In our part of the world, $185,000 [the application fee] is real money", said one respondent from South America. "You can do a lot with that kind of cash. Its not just a question of whether or not we could raise the money, but also whether getting a new gTLD would be the best use of that money." Application costs were mentioned by 15 interviewees (only 2 as their #1 concern), with running costs cited by a further 9.

Complexity of the Process and ICANN Follow-up

The complexity of the application process and the lack of follow up by ICANN was also mentioned by some interviewees, though these were seen generally as less important issues given the overall unfamiliarity with the program. Those that did mention the issue described the process as "long and complex", "hard to understand for someone not familiar with the space" and generally challenging. The concerns about ICANN responsiveness from one respondent suggested that it wasn't clear exactly how much support should be expected from ICANN in the process, and how potential applicants might best interact with ICANN.

Concerns about Sales Channel, Competition with Global North

Last, there were a few interviewees – especially those who had considered the idea of generic or category new gTLDs either before or during the interview – who expressed some concern about competition and sales channel. Some noted the limited number of registrars in the global south generally and the lack of information about the program among regional channel partners. Others cited their sense that, as

applicants for a generic term, they'd have a harder time developing relationships with the major global north registrars who might prefer to work with other, more familiar, global north partners.

Other issues mentioned

Negative publicity was cited by a few interviewees as having influenced their decisions around applying. The handling of the .xxx controversy was mentioned by one interviewee and the ongoing .africa conflict was mentioned by two respondents. In each case, the interviewees expressed concern about the way ICANN had handled the situation, and concern that the controversy might stick in the minds of potential customers or users of a new gTLD

Negative Publicity

A few interviewees expressed generalized concern about the success of the new gTLD program more broadly. They wondered about public perceptions – and the value of potential investments in the new gTLDs – if the program failed to take off. Most interviewees saw the program still as too new to be evaluated, but at least two expressed concern that even though some new gTLDs were successful the public's perception that there were too many products on the market and that too many were not viable, making them more skeptical about participating in a future new gTLD round.

Concern about the Success of the Program

Overall Level of Interest in Potential Future Rounds

Despite many concerns, especially around the awareness/readiness of the market and business plan or urgency, when asked about interest in future new gTLDs, there were many optimists. More interviewees were positive about the program (rating the idea a 4 or 5 out of 5) than were negative: 12 (4 + 5) vs. 9 (1 + 2). Still, when asked about their interest, the biggest group of respondents (12) rated the idea 3. We believe this fits with the general "wait and see" sense expressed by many respondents: that in the abstract the idea could be a good one – for them or for their regions – but that at this point it was too soon to tell and that much would depend on an evaluation of successes from this recent round.

More on Possible Uses for a New gTLD

Brand Home, Connecting with Customers or Community Members

By far the most common way of seeing the opportunity around a new gTLD was in using it to create a stronger "brand home" or connection with customers or community. Some interviewees talked about possibly using a new gTLD to create additional security for their customers or special loyalty areas as differentiators. Of the 37 interviewees, 25 rated this as their most likely use for a new gTLD (rated top or second priority).

Brand Protection/ Defensive

Brand protection was a second but still quite significant focus area for interviewees when thinking about the new gTLD program. They cited the need to keep others from owning "their name space" on the web and the idea that having their own gTLD would help them control their IP and online profile. This use was cited as a top or second priority by 15 respondents.

Promoting Cultural or Regional Identity

Regional or Cultural Identity was discussed by a number of respondents including cities, regional organizations like CARICOM and others. The possibility of promoting regional or cultural/ethnic identification as a potential business was brought up in conversations around .carnival or .swahili, though the primary driver still seemed in both cases to be cultural preservation/promotion. This opportunity was cited 9 interviewees, with 5 listing this as their top priority or the best opportunity in their minds.

Investment

The idea of pursuing a new gTLD as an investment – getting a generic or category term and selling names – was not widely mentioned by our global south interviewees (only 7 described this as a top or secondary priority). Reasons varied. Some cited competition the global north, the newness of their markets to the domain business and other concerns, but most saw the opportunity as "too speculative" given the lack of track record for new gTLDs as a whole.

Other Uses

Other uses mentioned by respondents included internal networking, consolidating various ccTLDs in one area, or creating shorter names for an increasingly mobile-dominated web environment.

Advice For ICANN – Outreach

- Nearly all interviewees recommended more and better outreach from ICANN over a longer period of time if we want to reach the global south.

- They urged much clearer communications around the process, making it easier to understand costs (including all-in costs).

- Especially in Latin America, they urged more focus on timelines to help potential applicants share the idea with internal audiences, and more sensitivity to regional dynamics – understanding that a program with deadlines during the summer months was likely to be problematic

- They urged much greater focus on reaching not just potential applicants but also the general public, avoiding the need for applicants to both make the application and make the market. (This was also seen as crucial for reaching decisionmakers in large organizations who in many instances had not heard enough about the program.)

- Interviewees especially recommended reaching out to potential applicants through trade associations (top recommendation) as well as conferences, the traditional media and social media. Interestingly, ICANN, the tech press and registrars were not as widely mentioned as potential outreach vectors, perhaps given their more limited reach with the general public. Reaching out to lawyers and other professionals was also recommended, and this might be a good way to help interested parties solidify their interest in moving through the process.

Advice for ICANN – Key Messages that could be Strengthened

- Without question, the most important messaging suggested by the interviewees centered on success cases and business model. Interviewees were nearly unanimous – 32 of the 37 interviewees cited this as their top priority and noted the lack of business model examples as a limiting factor for applications. They wanted information to help them understand and explain to internal constituents:
    - What success might look like
    - What successful applicants might expect longer term from their investment

- How successful applicants talk about their decision to go forward to internal and external audiences

- An important secondary and related message revolved around belief – the sense that a new gTLD was appropriate for and possible in the global south context. A number of interviewees said – in different ways – that they would like to see more messaging from ICANN that effectively said "you can do this". Getting more, and especially clearer, information was a part of this recommendation, but many believed that it was not enough to just say "this is out there…". They wanted more encouragement and more information showing "this can be for you."

- Security and SEO issues were mentioned by a number of interviewees, especially in Asia. Program messaging around this – explaining, for example how SEO issues could be addressed. Recognizing that this could be difficult given the ever-changing technology landscape, this was clearly on the minds of a number of respondents, and getting out any available information will be helpful and could increase participation.

- The idea of generics or categories as a potential gTLD investment is still not widely enough understood and communication around this idea could help spur demand. In numerous conversations interviewees noted that they hadn't thought about the possibility of using a new gTLD as an investment/platform for name sales, with one applicant saying "I didn't know that was even possible". The interviews suggest that even with regional constraints, there would be greater interest if more information were out there about this business model/approach in particular. To paraphrase one interviewee, "There's plenty of investment money in our region, but we need to have a clear sense what we're investing in."

Next Steps

The results of the interview and analysis show both positives and some negatives, but overall they point to significant opportunity in the global south and interest – if the community takes action to meet emerging markets where they are – growing but still newer to the TLD space, with populations still coming online and an emerging sense of the market potential. Below are key questions we need to ask plus some recommendations for action.

What can ICANN do?

1. To address the issue of communications around the program we need to ask:

    a. Do we have the tools we need to improve communications? Are there worksheets or timelines that could help potential applicants to better understand the timing and details like cost? Do we have answers to common questions about SEO and potential customer confusion?

    Recommended Action: Examine current outreach tools and how they might be expanded with a specific focus on emerging markets to be ready for a future round.

    b. Are we being accessible? Are we speaking simply and clearly to potential applicants? Can our existing communications be made more accessible recognizing that many decisionmakers have other priorities and will never know much about ICANN or the workings of the community.

    Recommended Action: Review our messaging and process and ask, is it accessible to non-insiders? Where it requires too much insider knowledge, we should look to make it simpler if at all possible. Consider "how-to" seminars as a way of working with potential applicants in the global south (or expand them if they have been offered in the past.)

    c. Are we reaching potential applicants from all the sources we should? Global south markets, many interviewees noted, still operate in what has been described as "high-context" business culture – where people discuss new ideas face to face. Most interviewees knew what they knew through their networks. Outreach through trade associations, conferences, and advisors such as lawyers and consultants can help socialize the idea of new gTLDs, lowering the perception of newness and potentially creating groups of applicants.

Recommended Action: Build a list of conferences and industry gatherings and begin as soon as possible to get on the agenda. Finding connectors and reaching them in-language is crucial. Reaching out through sector specific events (a recommendation of the research) could be both efficient and provide valuable "endorsement".

d. Are we reaching the public? Simply put, interviewees told us that without more public understanding of the IDEA of a new gTLD, the prospect of their participation felt much riskier (and was therefore less likely). To reach the public we need to keep our messaging simple, they advised, but also consistent. Market awareness takes time to build.

   Recommended Action/Approach: This is, admittedly, more challenging and will require careful consideration. To effectively reach the public we will need the entire ICANN community working together – including members of the RALOs, ISOC, governments and many other actors. To make this outreach a reality – and not just well-meaning rhetoric – we need to set goals around public outreach and work with diverse global south partners to achieve them.

2. To address issues around business plan and business model we need to ask:

   a. What do we know about new gTLD successes to this point? Are there common themes and approaches that – without giving away trade secrets – we can share? What information can we provide to potential global south applicants that – and how – a new gTLD is helping one of their counterparts/competitors?

      Recommended Action: Recognizing that this is challenging, given the need for ICANN as an institution to remain neutral in the competitive landscape, we should try to create collateral around success cases that we can share with the potential applicant community. The information needs to be straightforward and aimed at audiences with different levels of technical expertise, with a goal of answering one simple question: if our group, association or organization decides to go forward, what path(s) can we take and what would we get out of it? This is one of the single most important issues mentioned across numerous markets, and if at all possible, one we need to address it.

   b. Related to the idea of success cases, are there any lessons we can share or approaches that are might be particularly helpful to potential global south applicants or relevant to global south markets?

Recommended Action: Develop additional research on the best ways to reach the general public and build dialogue around new gTLDs in the public-private sphere; to the greatest extent possible, start preparing the public for the next round.

c. How can we more effectively share the idea of the "generic" or investment gTLD? Investments made up a large segment of the new gTLDs applied for in the global north during this last round, but our research shows that this idea was not well understood as an option in the global south. Can we provide more and better information specifically around this approach to new gTLDs, with a focus on the reality of global south markets?

Recommended Action: Again, this is a question of how far ICANN can go in promoting this aspect of the new gTLD program, and what form this promotion might take. Fact sheets around the idea of investment, as well as guides for potential "category" new gTLDs could help. Could a partnership with regional business schools provide more data – and put bounds around – the opportunity in local terms?

3. To address issues of cost we need to ask:

a. Is it possible to reduce costs or offer price support for emerging markets? After this recent round of new gTLDs, there will no doubt be a review of application costs, and it is possible they might be reduced in future rounds. But in any case, are there areas of the world where we as a community choose to support/incentivize global south participation, either by reducing the application fee or lowering the ongoing running costs.

Recommended Action: Recognizing that this wasn't the primary driver for respondents in our survey, it remains a key issue both practically and in perception. It is unclear this is something the ICANN community is committed to, but it would be wise to revisit both pricing and the results of the Joint Applicant Support (JAS) experience from this round. Based on the JAS results the Joint Applicant Support effort, we would recommend that any approach to reduced pricing be simple to understand and widely promoted. Unclear if this is practical or the most effective use of community time.

b. Is it possible to more clearly communicate around total costs – both application and running costs?

Recommended Action: Build clearer cost collateral for wide distribution. Include the "all in costs" (for example, to include consulting costs, as consultants were used in many applications). This appeared as an area where there was confusion – even among people interested in applying – and that could be remedied.

4. For other issues, some quick recommendations:

    a. Consider and discuss the idea of creating a consultant registry to help applicants in the global south connect with consultants – especially local firms – that could help them with their applications.

    b. Continue ongoing work to help build regional sales channel – especially more registrars – in the global south, and

Final Thoughts

A great deal was learned about the program – how it was perceived in emerging markets and what we might do to address demand in future rounds. That said, there are two important questions that lie beneath all the work, questions the study was not asked to address:

- Is it really ICANN's role or (or should be its goal) to promote the new gTLD program generally? If so, where are the limits to this promotion? If not, who can take the lead, what are their goals, and can they be successful in all markets or just in the global north? Can the applicants themselves do enough? It is clear that many interviewees believed ICANN should have done more to promote the new gTLD program generally in their regions, but it is also clear that we must manage expectations in keeping with ICANN's mission and finite resources – both financial and in terms of volunteer time.

- How much of a priority is it to promote new gTLDs in the global south? Is it even something we wish to do, and if so, what are our motivations? Who would be partners in this effort, and what level of commitment can we expect from them? What would success look like? In the end, as a community it will be important to confirm that we are committed to increasing global south participation in future new gTLD rounds. Answering that question – and the reasoning behind our answer – will go a long way to understanding our best future courses of action and help ICANN mobilize the community and other resources for success.

These are open questions, and we look forward to the discussion around them.

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Annex 1 – Data/Weighted Results

Key Constraints						
1-Most Important, 5-Least Important	1	2	3	4	5	% Respondents
time	11	4	1	2	1	51%
app cost	2	6	2	4	1	41%
run cost	2	1	1	2	3	24%
biz model/urgency	6	3	16	3	3	84%
incomplete/confusing info	10	11	4	3	2	81%
process complexity	4	3	3	8	2	54%
market awarness/idea too new	0	6	5	3	5	51%
customer confusion/SEO	1	3	0	0	2	16%
security	0	0	0	2	0	5%
consulting help	0	1	0	1	3	14%
lack of ecommerce	0	0	0	0	0	0%
sales channel	0	0	0	1	0	3%
lack of a home in group	0	0	1	0	1	5%
negative publicity (.xxx, .africa)	0	0	1	0	1	5%
competition w/global north	0	0	0	0	2	5%
lack of feedback from ICANN	0	0	0	1	0	3%

How to Use						
1-Most Important, 5-Least Important	1	2	3	4	5	% Respondents
brand protect	10	5	1	0	0	43%
differentiator w/or reach clients	16	9	1	0	0	70%
internal network/supply chain	0	2	1	0	0	8%
investment/selling domains	4	3	2	0	0	24%
culture/commun	5	3	1	0	0	24%
short names for mobile	0	2	0	0	0	5%
consolidate numerous ccTLDs	0	0	1	0	0	3%

Outreach						
1-Most Important, 5-Least Important	1	2	3	4	5	% Respondents
trade/other assns	9	6	2	0	0	46%
trad media	5	7	2	0	0	38%
ICANN	3	6	1	0	0	27%
conferences	6	3	3	0	0	32%
tech press	4	0	1	1	0	16%
social media	5	2	1	0	0	22%
tech/registrars	2	2	0	0	0	11%
lawyers/consultants/advisors	2	3	2	0	0	19%

Messaging						
1-Most Important, 5-Least Important	1	2	3	4	5	% Respondents
successes	31	1	0	0	0	86%
security + SEO info	1	2	0	0	0	8%
idea of generics	1	2	1	0	0	11%
more info/you can do it	2	10	0	0	0	32%

Tools						
1-Most Important, 5-Least Important	1	2	3	4	5	% Respondents
success cases	18	4	3	0	0	68%
info on IP protection/SEO	0	3	0	0	0	8%
biz plans?	3	7	1	0	0	30%
price help	1	1	2	0	0	11%
consulting	0	3	2	3	0	22%
info on process	10	5	2	0	0	46%
local language info	1	2	4	0	0	19%
MORE INFO TO THE PUBLIC	1	2	2	0	0	14%

Annex 2 – Interviewees

Note: In some cases the interviewee asked to have their name/affiliation unlisted

Region	Country	Sector	Person Interviewed/Title	Group/Company	About the Group/Company
ASIA	CAM	banking/ insurance	Head of Digital Marketing Team	Regional Bank	Largest bank in a South-East Asian nation and was initially founded as a microfinance organization. It currently has the largest number of rural customers among Cambodian banks and is growing fast in other markets.
ASIA	MLY	transportation	Senior member marketing and communications team	Major Regional Airlines	Large regional and increasingly international airline, which asked not to be identified in the research
ASIA	THL	tech sector/ telecoms	Head, Strategic Alliances and Business Strategy	Telecoms Corp	Large telecoms firm based in Thailand with operations around the sub-region
ASIA	VTN	banking/insurance	Luan Jenkins, head of Global Branding and Marketing	iCare Benefits	fast-growing employee-benefits firm based in Vietnam, with subsidiary operations in Cambodia, Laos, Vietnam, Malaysia, Indonesia, and the Philippines
AFR	GHA	investor	Eric Osiakwan	Chanzo Capital -- Angel Fair Africa	Tech investor and entrepreneur, focused on angel investing
AFR	KEN	media	CEO	CIO East Africa	Diversified media company based around major technology magazine and online platform
AFR	KEN	investor	investor	Hussein & Assoc	Tech investor and entrepreneur, working in diverse areas such s fintech
AFR	KEN	investor	President	DotSavvy	Regional technology consulting and management firm, digital marketing firm working with and advising large brands
AFR	NGA	apparel	CIO	Major fashion house	Internationally-known brand with Nigerian CIO
LAC	ARG	food/ agribiz	VP Technology	Grupo Arcor	Major food processing and candy/ice cream maker
LAC	ARG	e-comm	Senior Executive	E-Instituto	Nonprofit "Latin American Institute of Electronic Commerce"
LAC	ARG	government	IT Manager	City of Buenos Aires	Capital city
LAC	BRZ	conglom	Bank ICT Manager (speaking about the entire group)	Votorantim	Large industrial and finance conglomerate with activities in paper, materials, energy, steel and agribusiness

LAC	BRZ	transportation	Innovation Manager	Azul Airlines	New, fast growing regional airlines with a focus on the low-cost market and reaching large numbers of consumers
LAC	BRZ	transportation	Group Owner	Craft Group	Diversified group, largely based around shipping, export and transportation; also includes a tourism agency
LAC	BRZ	academia	ICT Manager	University of Sao Paulo	Large regional university
LAC	BRZ	government	Deputy Secretary	Sao Paulo State	State Government
LAC	BRZ	apparel	International Marketing Director	Grupo Alpargatas - Havaianas	Largest footwear company in the country as well as holding other apparel brands
LAC	BRZ	banking/ insurance	Marketing Director	Grupo Porto Seguro	Diversified financial group, including insurance and other businesses and wide national footprint
LAC	BRZ	retail	Senior Executive	Large Retail BR	One of the largest retail operations in the country
LAC	BRZ	media	Senior Executive	Media Group BR	One of Brazil's largest media groups
LAC	BRZ	legal	Owner	Perrotti & Barrueco	Major law firm with strong tech background
LAC	BRZ	food/ agribiz	Owner	Trust 9	Turnaround specialists focusing on the Agribusiness sector
LAC	BRZ	tech sector/ telecoms	Founder & CEO	BRQ	One of the largest IT companies in the country
LAC	BRZ	association	Exec Director	ABES	Brazilian Software and Services Association
LAC	BRZ	banking/ insurance	Senior Executive	Brazilian Bank & Finance Group	Large bank founded in Brazil
LAC	CHL	association	Various Members of the Mgmt Team	Asoex	Fruit exporters association from Chile
LAC	COL	association	Executive Director	Assn Colombiana de Mineira	Association for the mining sector across the country
LAC	COL	tech sector/ telecoms	Manager	American Domains	One of the largest resellers in Colombia
LAC	JAM	media	Online Manager	Gleaner Media	Major Caribbean media company and newspaper conglomerate
LAC	JAM	government	ICT4D Lead	CARICOM	Association of Caribbean States, a grouping of governments from around the Caribbean region
LAC	PRU	association	Executive Directors	Associacion Nacional de Industria (SNI)	Broad-based industry association
LAC	PRU	conglom	Head of Sustainablity + New Markets	Grupo Custer	Diversified group of companies with activities in food packaging, distribution and other areas
LAC	PGY	tech sector/ telecoms	IT Manager	TIGO	Largest mobile operator in the country

LAC	UGY	academia	IT Manager	Univ de la Republica	Largest university in the country, government supported
Middle East	EGY	consulting	President	Amro Commercial	Consulting and real estate group based in Egypt and working across the Middle East region
South Asia	PAK	conglom	CEO	Rockville Group	Diversified conglomerate working in technology, import/export, education and other sectors across South Asia and the Middle East, as well as East Africa

Annex 3 – the Questionnaire

ICANN New gTLD Interview Questions

Over the course of nearly two months the project team interviewed a variety of industry leaders in markets and sectors across the world, to get their insights into the new gTLD program. The interviews were built around the questions below, but were kept intentionally conversational to get not just the raw data, but also to prompt interviewees to volunteer their thoughts in a personal way – and in their own words.

1. Awareness

a. Have you heard about the new gTLD program – the program to expand the number of new domain extensions offered to users around the world? How would you describe your level of knowledge or awareness?

b. Can you please tell me what have you heard/what you know about this new program? How would you describe the program and its goals?

c. How did you hear about the program? From whom, or through which source or sources did you get your information?

2. Barriers

a. Did you – or your company/group - consider applying for an extension? *If yes,* which extensions were you considering?

b. *If yes*, why did you decide not go forward with the application? What constraints or concerns influenced you or your group? Which were the most important issues? Which issues were less important?

c. *If No,* can you tell me what factors influenced your decision not to apply for a new gTLD? What were the key decision points? What were the constraints that factored into your decision?

3. Possible uses/attractiveness of the new gTLD idea

a. If you considered applying for an extension, were you considering applying for:
    i. Your company/group name?
    ii. A vertical or generic name?
b. How were you planning to use a new gTLD, or if you hadn't considered applying, what approach makes most sense to you/seems best for groups and organizations like yours? What possible business plans might you follow?
    i. Getting your name as a market differentiator/connection to clients?
    ii. Getting your name as brand protection?
    iii. Getting another name as an investment/to sell names?

4. Advice for ICANN and the ICANN Community

a. How might we better reach groups like yours in the future? What are the best avenues to expand outreach to your community/sector?

b. Are there key unanswered questions that you have around the new gTLD program that you would recommend ICANN address going forward?

c. What tools would be helpful to you as you think about participation in a future new gTLD round?

d. What if any cultural or development dynamics from your region should we consider as ICANN looks to future rounds?

5. Future Participation

How interested are you/would your organization be in participating in a future round?