

## CCT-RT HYPOTHESIS WORKSHEET

Sub-Team: **Carlton (lead), Gao, Calvin**

### HYPOTHESIS:

Consumers are mostly aware of new gTLDs.

**OWNER: Carlton**

### HIGH LEVEL QUESTION:

*What is the evidence and how compelling is it?*

*Are there any weaknesses in methodology that might impact its reliability and how could those be addressed?*

*What steps might be necessary to expand/increase awareness?*

*Does ICANN have a role in promoting increased awareness by consumers of the new gTLDs?*

### FINDINGS:

1. Total awareness of new gTLDs increased from 46% to 62% between 2015 – 2016

Source: Phase 2 Global Consumer Research

2. Modest increase in average awareness overall between 2015 and 2016:

Source: Phase 2 Global Consumer Research

NEW TLDS	2015	2016	
<b>AVERAGE AWARENESS (%)</b>			
Consistent gTLDs	14%	16%	(2%-39% across regions)
Added gTLDs	NA	20%	(7%-37% across regions)
Geographically Targeted gTLDs	10%	13%	(1%-34% across country)
<b>AVERAGE VISITATION (%)</b>			
Generic Extensions	15%	12%	(2%-37% across regions)
Added gTLDs	NA	15%	(2%-34% across regions)
Geographically Targeted gTLDs	12%	9%	(1%-23% across country)

Consistent—shown in both waves: .email, .photography, .link, .guru, .realtor, .club, .xyz  
 Added: new in this wave: .news, .online, .website, .site, .space, .pics, .top  
 Geographically Targeted: based on only those shown in that region

Source: Phase 2 Global Consumer Research Report

3. Significant increase in awareness in some geographies evidenced between 2015 and 2016; awareness of any new gTLD in AP, Africa and LAC is as much as 20 points higher than in North America and Europe:

### Consumer Awareness as a Percentage of Surveyed Consumers By Region

Geographic Region	YEAR 2015	YEAR 2016

Asia Pacific	53	58
Europe	33	45
North America	29	38

Source: Phase 1 (April 2015) and Phase 2 (June 2016) Global Consumer Research

4. Awareness highest for geographically targeted gTLDs by country.
5. Consumer awareness is independent of the time since the new TLD is delegated and live
6. Consumer awareness does not track the new TLDs with the highest number of domains sold
7. Consumer awareness higher for legacy domains and continue to grow

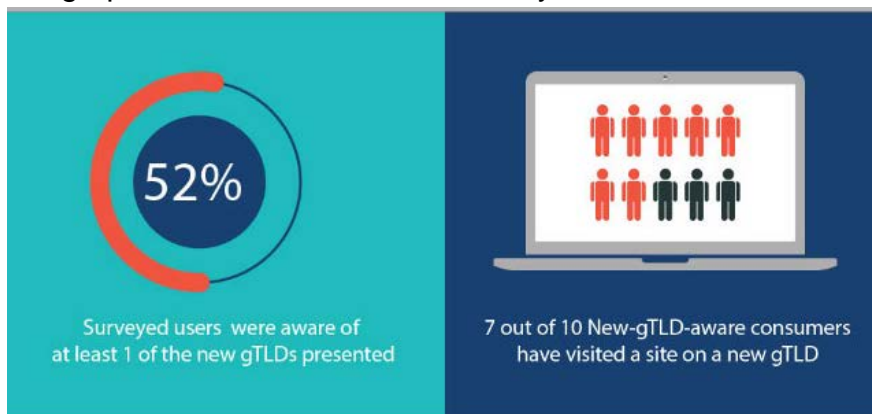
LEGACY TLDS	2015	2016	
<b>AVERAGE AWARENESS (%)</b>			
High	79%	89%	(76%-99% across regions)
Moderate	36%	43%	(20%-64% across regions)
Low	9%	13%	(5%-12% across regions)
Geographically Targeted ccTLDs	86%	88%	(51%-99% across country)
<b>AVERAGE VISITATION (%)</b>			
High	71%	81%	(63%-97% across regions)
Moderate	22%	27%	(11%-44% across regions)
Low	4%	7%	(2%-32% across regions)
Geographically Targeted ccTLDs	81%	81%	(29%-98% across country)

High: .com, .net, .org  
Moderate: .info, .biz  
Low: .mobi, .pro, .tel, .asia, .coop  
Geographically Targeted: based on only those shown in that region

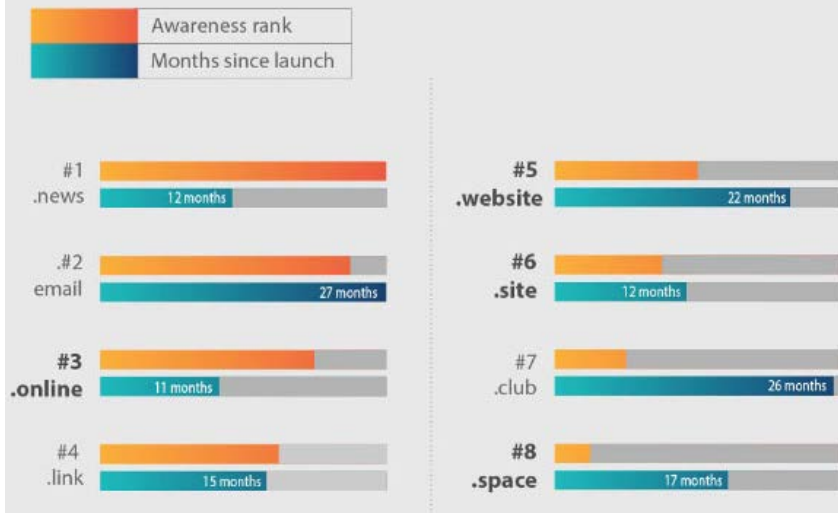
Sources: Phase 1 (April 2015) and Phase 2 (June 2016) Global Consumer Research funded by ICANN and executed by Nielsen

## Detailing Select TLDs

Infographics of Phase 2 Global Survey Research Data For Select TLDs – Source Radix



## New gTLDs Consumers are Most Aware of



### Example:



### Example



3<sup>rd</sup> most known new gTLD globally



Higher awareness in Asia vs .asia



No.1 in Europe



No.1 in Germany, France, Poland and Vietnam



3<sup>rd</sup> most visited new gTLD globally



More .ONLINE sites visited compared to .biz sites

## CAUSES:

1. Consumer awareness track highest for domains with an implied purpose or to which they readily associate to a function executed on the Internet
2. Owner of several new gTLD domains attribute their high consumer awareness quotient to “to extensive end customer marketing like trade shows, hackathons, online marketing, offline ads on bus shelters etc. and so on.”

## PRIORITY TO ADDRESS:

Before any new round fix the rationale for introducing new gTLDs

Examine whether the communication channels via which consumers and aspirational consumers are engaged are fit to purpose

## RECOMMENDATIONS:

1. Board to examine and determine whether the justifications for new gTLDs should be revised. Such revision might then consider whether priorities for introduction should be established and the criteria developed.

2. Use more old media channels – radio, newspapers, moving billboards,, billboards and the like - to popularize and raise awareness of any new gTLD program

**REVIEW:**

1. Before any new gTLD program launch, do a general DNS awareness exercise focused in geographic areas where growth is lagging using a mix of methodologies
2. Establish demand vectors for new gTLDs and test their applicability in these areas
3. Repeat global consumer awareness survey
4. Unless there is double digit increase in awareness concomitant with demand then question the premises for a new gTLD program

**Research Analysis Worksheet**  
(Intended to feed into the hypothesis worksheet)

Staff Research – see Brain Aitchison’s Report

Global Consumer Survey Phase 1 by Nielsen

Global Consumer Survey Phase 2 by Nielsen