NEXT STEPS

CCT-RT DISCUSSION PAPER WORKSHEET

HIGH LEVEL QUESTION:
Do consumers trust new gTLDs?

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SUB-QUESTIONS:

1. Why do consumers visit TLDs?
   a. Do consumers visit new gTLDs as much as legacy gTLDs?

2. Do consumers trust new gTLDs as much as legacy gTLDs?
   a. Do consumers trust certain specified gTLDs?

3. Do consumers provide sensitive information (*e.g.,* personally identifiable; financial or health information to new gTLDs?
   a. Compared to legacy gTLDs?

4. Do consumers trust new gTLDs that offer domain names to:
   a. Take precautions regarding who gets a domain name
   b. Give consumers what they think they're getting
   c. Screen individuals/companies who register for certain special domain names

5. Do restrictions on who can purchase domain names contribute to consumer trust?
   a. Do consumers expect restrictions on who can purchase new gTLDs?
   b. Do consumers expect restrictions on who can purchase legacy gTLDs?

6. Do consumers expect certain restrictions to be enforced?

7. What makes a gTLD trustworthy [text box]?

8. Why do consumers avoid unfamiliar gTLDs [text box]?

FINDINGS:

1. Why do consumers visit TLDs?
   a. Consumers visit gTLDs based upon relevance of gTLD to the information they seek
   b. Familiarity with site also plays a role

   Source: Nielsen, Phase 1, ICANN Global Consumer Research Study p.8, 18, 36

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1a Do consumers visit new gTLDs as much as legacy gTLDs?

  c. No.
    i. 2015: 71% legacy gTLDs have high visitation rates vs. 15% of new gTLDs having high visitation rates.
    ii. 2016: 81% legacy gTLDs have high visitation rates vs. 12% of new gTLDs having high visitation rates; 15% for added gTLDs.

Source, Nielsen, Phase 2, ICANN Global Consumer Research Study p.7

2. Do consumers trust new gTLDs as much as legacy gTLDs?
   a. No. Significantly lower levels of trust for new gTLDs compared to legacy gTLDs
      i. 2015 90% find legacy gTLDs very/somewhat trustworthy
      ii. 2015 49% find new gTLDs very/somewhat trustworthy
      iii. 2016 91% find legacy gTLDs very/somewhat trustworthy
      iv. 2016 45% find new gTLDs very/somewhat trustworthy; 52% for added gTLDs

Source: 2015: Nielsen, Phase 1, ICANN Global Consumer Research Study p. 9, 40
2016: Nielsen, Phase 2, ICANN Global Consumer Research Study p. 9

2a. Do consumers trust certain specified gTLDs?

Consumers divided and response varies across region. (approx.. 50% rate .news; .photography, .email, .realtor as trustworthy with .news as most trusthworthy)

***** Were all of these actually in use at time of survey?*

Source: 2016: Nielsen, Phase 2, ICANN Global Consumer Research Study p. 55

3. Do consumers feel "somewhat comfortable" providing sensitive information (e.g., personally identifiable; financial or health information to new gTLDs? Compared to legacy gTLDs? Type of info:
   a. email address:
      i. .com 92%
      ii. New gTLD 48%

   b. Home address:
      i. .com 83%
      ii. New gTLD 44%

   c. Phone number:
      i. .com 75%
      ii. New gTLD 40%

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d. Financial Info
    i. .com 62%
    ii. New gTLD 36%

e. ID number
    i. .com 59%
    ii. New gTLD 34%

f. Healthcare info
    i. .com 68%
    ii. New gTLD 40%

Source: 2016: Nielsen, Phase 2, ICANN Global Consumer Research Study p.90

4. Do consumers trust new gTLDs that offer domain names to: a. Take precautions regarding who gets a domain name; b. Give consumers what they think they're getting; c. Screen individuals/companies who register for certain special domain names.
    a. Overall consumers trust the domain industry to perform these functions.
        i. 73% overall: Take precautions regarding who gets a domain name
        ii. 71% overall: Give consumers what they think they're getting
        iii. 71% overall: Screen individuals/companies who register for certain special domain names

    b. Whether the domain industry actually performs these functions is a separate but important issue.

    Source: Nielsen, Phase 1, ICANN Global Consumer Research Study p.9-10, 49

    c. Regarding giving the consumers what they think they're getting:
        i. 55% expect that websites registered under domains should reflect "a very clear relationship " to the gTLD under which it's registered
        ii. Only 6% expect that the websites could be used by "any company"
        iii. 15% have no expectations

    Source: Nielsen, Phase 2, ICANN Global Consumer Research Study p.9, 50

5. Do restrictions on who can purchase domain names contribute to consumer trust?
    a. 2015 Yes 56% for all gTLDs (though many of those surveyed also oppose restrictions in general)
    b. 2016 Yes 70% for all gTLDs

NEXT STEPS

5a Do consumers expect restrictions on who can purchase new gTLDs?

a. 2015 67% expect restrictions on new gTLDs.
b. 2016 73% expect restrictions on new gTLDs.

5b Do consumers expect restrictions on who can purchase legacy gTLDs?

a. 2015 63%
b. 2016 72%

Source: Nielsen, Phase 1, ICANN Global Consumer Research Study p.9-10, 25-26, 44
Nielsen, Phase 2, ICANN Global Consumer Research Study p.9, 13, 26, 60

6. Do consumers expect certain restrictions to be enforced? Yes (3/4)
   a. Validation that person/company registering site meets intended parameters: 82%
   b. Requirements for validated credentials related to gTLD: 80%
   c. Requirements for use of name to be consistent w/meaning of gTLD: 79%

Source: Nielsen, Phase 2, ICANN Global Consumer Research Study p.27

7. What makes domain extensions trustworthy [textbox]?
   a. Reputation and familiarity

Source: Nielsen, Phase 2, ICANN Global Consumer Research Study p.19-20 [see also p.56-57: What makes an unfamiliar domain extension feel trustworthy? P56-57 relevance of info ranks high]

8. What are the reasons for avoiding unfamiliar domain extensions? [text box]
   a. Security and lack of familiarity rank high

Source: Nielsen, Phase 2, ICANN Global Consumer Research Study p.40-41

CAUSES:

1. Trust seems tied to familiarity with gTLD (reputation and usage identified when asked as an open ended question Phase 2 (19-20, 35, 56-57)

2. Familiarity with gTLD likely depends on visitation. Relevance to information sought is highly relevant factor for visitation.
   a. Consider whether new gTLDs are sufficiently "relevant" to what consumers want to find information about

NEXT STEPS

3. Consumers expect that there will be some type of restrictions on the sale of gTLDs. This expectation increased in 2016 for both legacy and new gTLDs.

PRIORITY TO ADDRESS: High priority and should be addressed to in the short term and certainly prior to subsequent rounds.

RECOMMENDATIONS: ***[recommendations to ICANN. For each, specify: 1. Target of recommendation (i.e. Staff, Board, SubProc PDP); 2. Nature of recommendation; 3. Implementation details, exceptional costs, etc.]***

1. Consider how to select gTLDs that are relevant to what the public seeks information about
    a. Board/Staff recommendation
    b. Likely requires research data

2. Consider restrictions on who can purchase gTLDs to ensure that user expectations are met regarding: a. relationship of content of gTLD to name of gTLD and b. implied messages of trust conveyed by names of gTLDs (particularly in sensitive or regulated industries as advised by GAC)

    a. Board/Staff recommendation
    b. Would require changes in standard contracts and could increase compliance costs

REVIEW:

1. Repeat selected parts of Nielsen study and look for increase in familiarity with new gTLDs; visitation of new gTLDs; perceived trustworthiness of new gTLDs.

2. Consider collecting data on registration restrictions to compare consumer trust levels between new gTLDs with varying degrees of registration restrictions.

3. Review in two years to assess and recommend changes if an increase in trust is not observed.