OWNERS: **Carlton (lead), Gao, Calvin**

Refer to Laureen's Model Issue Paper -
https://docs.google.com/document/d/1rswTUNmvB_Lkt2RDwU2OuNx13pptdP_TpgCZ3V77UBk/edit?usp=sharing

CCT-RT DISCUSSION PAPER WORKSHEET (LAUREEN'S TEMPLATE ADOPTED ON PLENARY DRAFT #17)

HIGH-LEVEL QUESTION:

Are consumers in the global space aware of new gTLDs?

OWNERS: **Carlton (lead), Gao, Calvin**

SUB-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:

Consumers	**Registrants**
1. *Total awareness of new gTLDs increased from 46% to 62% between 2015 – 2016 for consumers* *Source: Phase 2 Global Consumer Research* 2. *Modest increase in average awareness overall between 2015 and 2016:* *Source: Phase 2 Global Consumer Research*	1. While the overall awareness about new gTLDs amongst registrants is generally higher than awareness amongst consumers, registrants' awareness of new gTLDs declined in 2016 from 66% to 64%in the previous year. 2. Meanwhile, consumer awareness of new gTLDs increased by 6%. 3. Awareness for added new gTLDs that were not previously surveyed in 2015 stands at 15%. *Source: Nielsen Registrant Survey*

Source: Phase 2 Global Consumer Research Report

NEW TLDS	2015	2016	
AVERAGE AWARENESS (%)			
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)
AVERAGE VISITATION (%)			
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

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:*

A. Consumer Awareness as a Percentage of Surveyed Consumers By Region

Geographic Region	YEAR 2015 (%)	YEAR 2016 (%)
Asia Pacific	*53*	*58 (+5)*
Europe	*33*	*45 (+12)*
North America	*29*	*38 (+9)*
Africa		
South America		

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

B. Registrant Awareness by Region

Geographic Region	YEAR 2015 (%)	YEAR 2016 (%)
Asia Pacific	*70*	*70*
Europe	*58*	*55 (-3)*
North America	*59*	*48 (-9)*
Africa	*58*	*38 (-20)*
South America	*66*	*70 (+4)*

- *African registrants have the lowest rate, and in particular, of the three African countries surveyed, South Africa is the one that drives the lower levels of Africa's awareness. African registrants are followed by North America, which includes US and Canada, whose awareness levels amongst registrants are even lower than that of South African Registrants.*
- *About ⅔ of registrants are aware of at least one new gTLD, with North America, Europe and Africa bearing lower numbers than South America and Asia.*

4. *Awareness highest for geographically targeted gTLDs by country for consumers: The pattern is similar for registrants (at least 74% registrants aware of new gTLDs). Familiarity of geographically targeted gTLDs seems to contribute to higher levels of awareness, perhaps because the familiarity of the gTLD evokes trust and perceived legitimacy of the said gTLD.*
   Asia leads the pack, with its registrants' awareness higher than all other regions. .tokyo leads at 40% awareness, and even .seoul, which is not delegated yet, has an awareness level of 28%.
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.

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

LEGACY TLDS	2015	2016	
AVERAGE AWARENESS (%)			
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)
AVERAGE VISITATION (%)			
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)

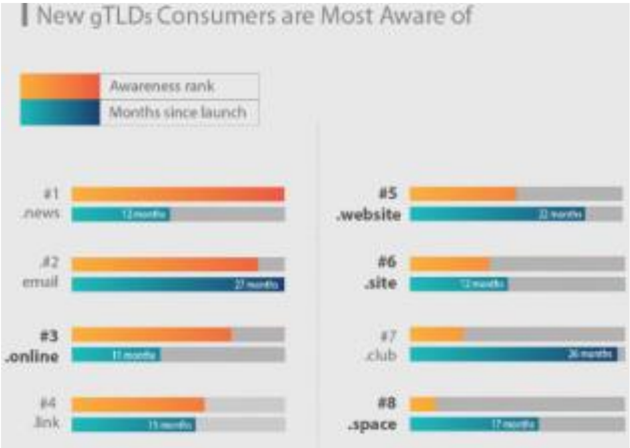
High .com, .net, .org
Moderate: .info, .biz
Low: .mobi, .pro, .tel, .asia, .coop
Geographically Targeted: based on only those shown in that region

Detailing Select TLDs

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

http://www.thedomains.com/2016/08/09/radix-new-tlds-fare-end-consumers/
http://www.circleid.com/posts/20160810_how_new_gtlds_fare_with_consumers_an_infographic/


52%
Surveyed users were aware of at least 1 of the new gTLDs presented
7 out of 10 New-gTLD-aware consumers have visited a site on a new gTLD


New gTLDs Consumers are Most Aware of
Awareness rank
Months since launch
#1 .news
#2 email
#3 .online
#4 .link
#5 .website
#6 .site
#7 .club
#8 .space

Example:

Example

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.
Examine whether the outreach programmes have reached as wide an audience as possible geographically (especially in developing countries).

Commented [1]: I am putting this one on the side to get views on the communication message:
Examine whether the message to potential consumers comes out clear to mention Applicant Support programme.

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 for both consumers and registrants.
3. Make effort to have a wider coverage of the publicity communications regarding new gTLDs.
4. As part of the communications, clearly promote the Applicant Support programme.

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 and registrant awareness surveys
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