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)

Preamble

This paper discusses Awareness of new gTLDs as it relates to trust. To the extent possible, the paper will also look at whether the addition of new choices in the gTLDs has contributed to increasing trust. The issue of trust is covered in more detail in other discussions papers in this sub-team.

HIGH-LEVEL QUESTION:

Are consumers in the global space aware of new gTLDs?

OWNERS: Carlton (lead), Gao, Calvin

SUB-QUESTION:

1. *Has awareness increased year on year?*
2. *Has greater awareness of the new gTLDs increased trust? [Relationship between awareness and trust in new gTLDs]*
3. *What attributes/practices of new gTLDs have led to increased trust?*
4. *Are alternative identities more trustworthy?*
5. *Does ICANN have a role in promoting increased awareness by consumers of the new gTLDs?*

FINDINGS:

1. Has awareness increased year on year?

Consumers	Registrants
1. *Total consumer awareness of new gTLDs increased from 46% to 62% between 2015 – 2016* 2. *Modest increase in average awareness for consistent new gTLDs from 14% in 2015 to 16% in 2016* 3. *Modest increase in average awareness of ccTLDs/IDNs from 10% in 2015 to 13% in 2016* 4. *Average awareness across all legacy categories increased between 4% -10% between 2015 and 2016* *Source: Phase 2 Global Consumer Research Wave 2, Page 7*	1. *Total registrants' awareness of new gTLDs decreased in 2016 to 64% from 66% in 2015.* 2. *Average awareness of registrants for consistent set decreased from 22% in 2015 to 20% in 2016* 3. *Average awareness of registrants for ccTLDs/IDNs decreased from 20% in 2015 to 14% in 2016* 4. *Average awareness of registrants for all legacy categories decreased between 5% -10% from 2015 to 2016* *Source: Global Registrant Survey Wave 2, Page 11*

Source: Global Consumer Research Wave 2, Page 7

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

- *Significant increase in awareness in some geographies evidenced between 2015 and 2016. Awareness of any new gTLD relatively higher in AP, Africa and LAC than N. America and Europe; as much as 20 points higher than in North America and Europe*
-

A. Consumer Awareness 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: Global Consumer Research Wave 1, Page and Global Consumer Research Wave 2 Page 8 &18

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 is 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 even delegated yet, has an awareness level of 28%.

5. Consumer awareness seems 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 remains higher for legacy domains and continues to grow.

Sources: Consumer Awareness Research Wave 1, Page (April 2015) and Consumer Awareness Research Wave 2 (June 2016)

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

2. AWARENESS AND TRUST IN TLDs.

- *Average consumer trust in new gTLDs reflected a slight 4% decrease*
- Less than 50% of the new gTLDs, including geo-targeted gTLDs, seen as trustworthy by majority of registrants
- Registrant trust levels lowest in North & South America and highest in Asia, followed by Africa
- Registrants generally have higher trust levels than consumers

Source: Global Registrant Research Wave 2, Pages 62 & 63

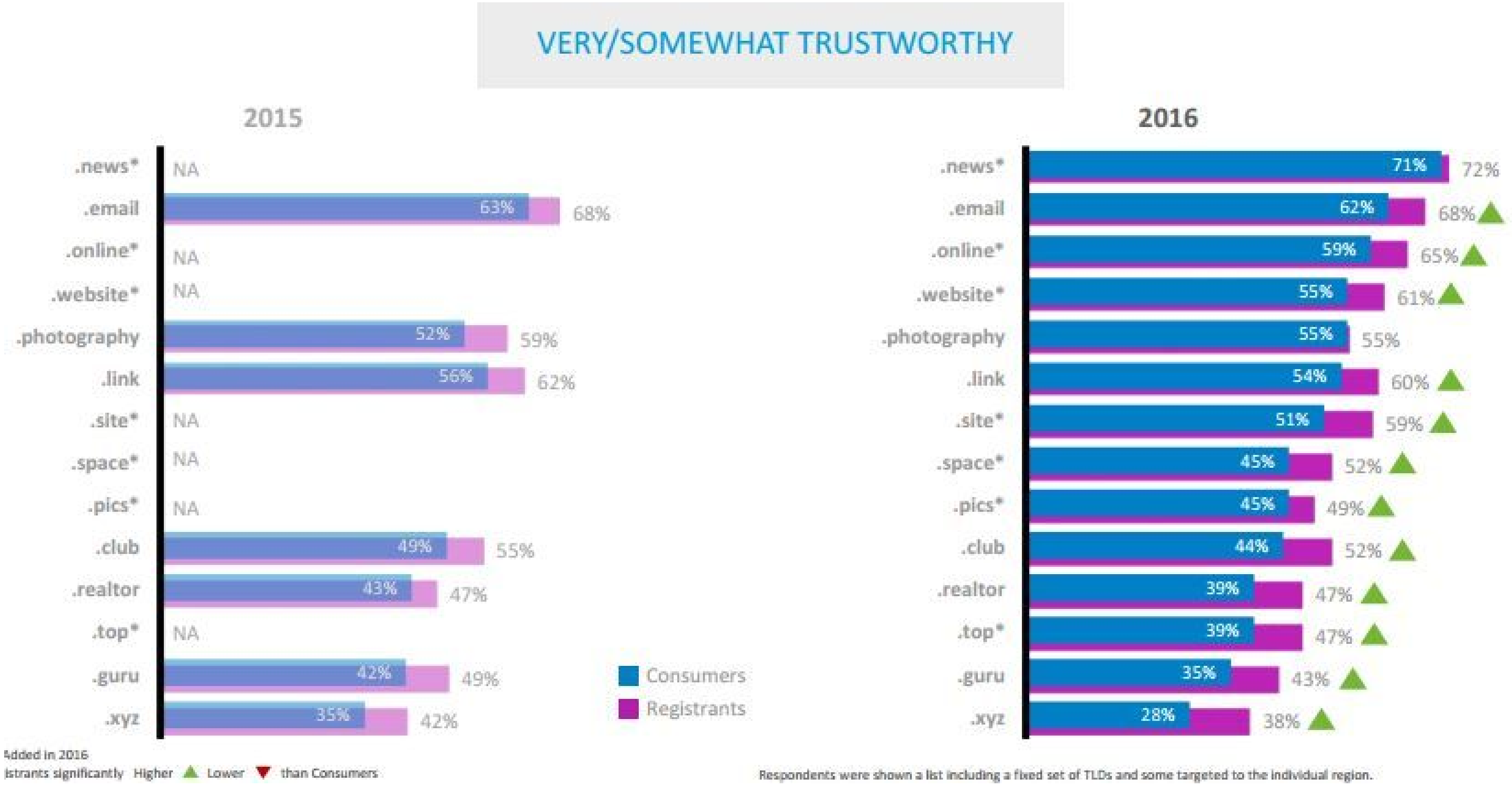
AVERAGE CONSUMER TRUST		
CATEGORY	**YEAR 2015 (%)**	**YEAR 2016 (%)**
New gTLDS	*49*	*45 (-4)*

New ccTLDs/IDNs	*53*	*52*
Legacy TLDs	*90*	*91*
Legacy ccTLDs/IDNs	*94*	*95*

- *New TLDs subjects in 2015: .email, .photography, .link, .guru, .realtor, .club, .xyz*
- *Average trust is measure of % who say ‘very’ and ‘somewhat’ trustworthy*

Source: Consumer Survey Research Wave 2, Page 9 & Page 18

Trustworthiness Consumers vs. Registrants



Source: Global Registrants Research Wave 2, Page 64

3. What attributes/practices of new gTLDs that have lead to increased trust?

- Registration restrictions increase trust
- Purchase restrictions increase trust

TRUST vs RESTRICTIONS

CATEGORY	YEAR 2015 (%)	YEAR 2016 (%)
New gTLDs	*67*	*73*
New ccTLDs/IDNs	*67*	*77*
Legacy TLDs	*63*	*72*
Legacy ccTLDs/IDNs	*62*	*70*
OVERALL	***56***	***70***

- About 50% of consumers and trending upward globally in support for some restrictions on purchase of new gTLDs domains. LAC and N. America more in favor of strict restrictions but largest gains in Africa
- 25% overall favour strict purchase restrictions for geo-related TLDs with variations by region; 31% N. America, 26% S. America, 22% Europe, 31% Africa, 34% Asia/Pacific

Source: Global Consumer Research Wave 2, Pages 24, 25 & 60

- 80% say content of websites that somewhat or clearly reflect intent of the gTLD

Source: Global Consumer Research Wave 2, Page 9

- Clear majority - upwards of 60% - count reputation and familiarity as attributes of domain trustworthiness

Source: Global Consumer Research Wave 2, Pages 19 & 20

- Registrants are more opposed to restrictions overall than consumers, trending down since 2015
- Registrants opposition to restrictions for new gTLDs increase for new gTLD with implied purpose

Source: Global Registrants Survey Wave 2, Page 67

4. Are Alternate Identities More Trustworthy?

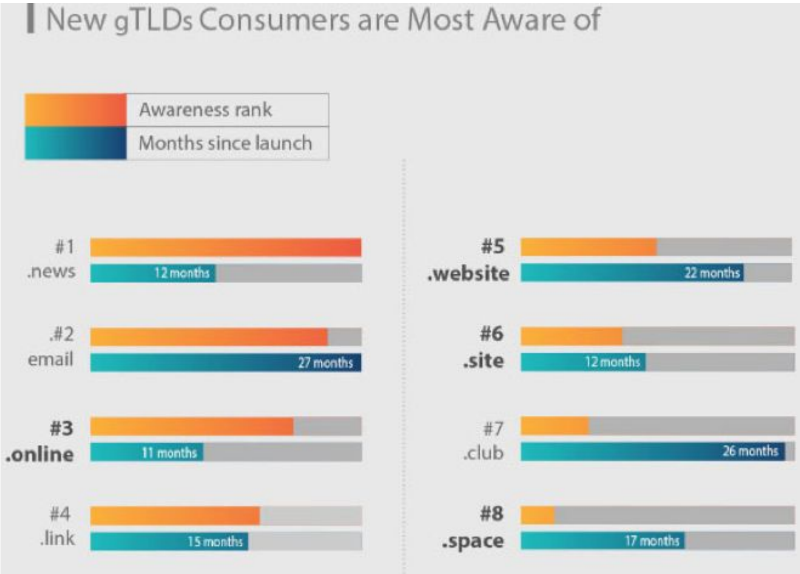
- One in four (24%) report using an alternative identity in lieu of registering an additional domain name; S. America and Europe moreso
- One in six (17%) said they did not renew a domain in favor of using an alternative method
- More than half (54%) will be less likely to register a new domain name or renew an existing one
- Cost and ease-of-use traits are the principal reasons for less likely registration or renewal
- Registrants in Africa, Asia and lesser so S. America are most likely responsive to alternative identities

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/



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."

RECOMMENDATIONS:

1.

REVIEW:

1.

Research Analysis Worksheet

(Intended to feed into the hypothesis worksheet)

Staff Research – see Brain Aitchison's Report

Global Consumer Research Wave 1 by Nielsen

Global Consumer Research Wave 2 by Nielsen

Global Registrant Research Wave 1 by Nielsen

Global Registrant Research Wave 2 by Nielsen