ccTLDs: The Second Wind?

TLDCON
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About Us

- Established in 2000 and launched .INFO in 2001
  - Locations in Ireland, Canada, USA, Australia and India.

- One of the original registry operator/registry service providers
  - Powers legacy TLDs such .ORG, .INFO, .MOBI, .ASIA, and .PRO
  - Responsible for supporting over 300 nTLD applications in the current round – mixture of generic, brand, and Geo TLDs.

- Premium anycast DNS provider for our own Registry Operators and others in the industry

- Cutting-edge mobile solutions through the Afilias technologies brand
  - DeviceAtlas - Highly extensive and accurate mobile detection solution.
  - GoMobi – complete “mobile-first” web-publishing solution.

What We Do!

Afilias' top-level domain registry manages / supports more than 20M names, ranging from legacy TLDs, ccTLDs, newTLDs to brand TLDs:

Generic Domains:

Registry Operator

Registry Service Provider

Country Domains:

Registry Service Provider

And a few more…

Registry Service Provider & New TLD Registry Operator

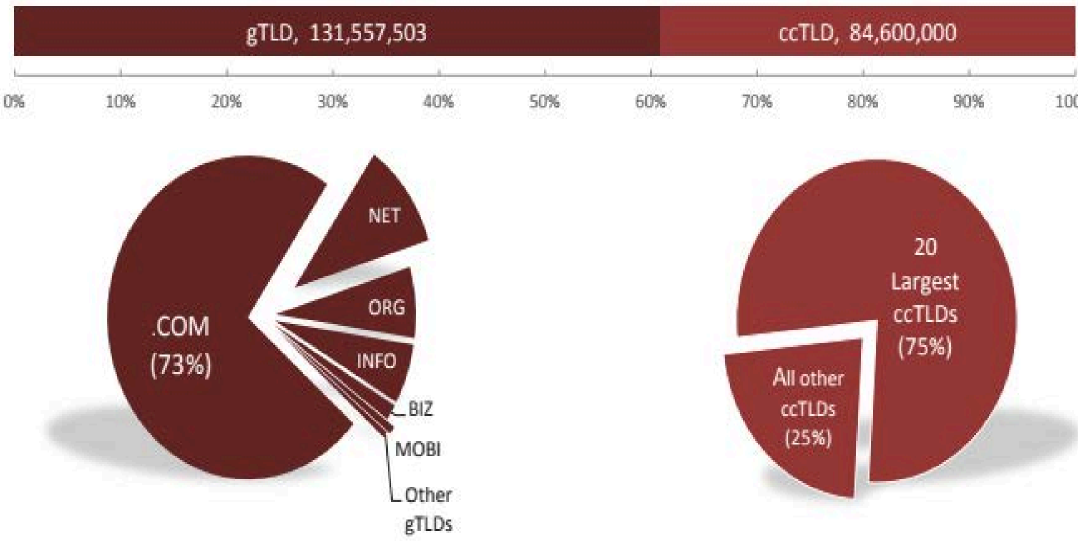
Registry Operator

.移动 mobile
.POKER
.pink
.BLACK
.red
.blue
.KIM
.SHIKSHA
.PROMO
.LGBT
.SKI
.bio
.green
.LOTTO
.pet
.BET
dotVOTE
dotVOTO
.archi
.ORGANIC

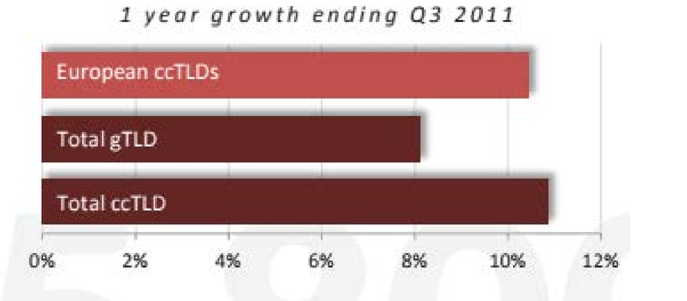
Registry Service Provider

.VEGAS
.LTDA
.SRL
.网站
.网站
.WEB IN CHINESE
.ADULT
.ngo
.ong
onl
you online
.GLOBAL
.RICH
.stockholm

Domain Landscape: Then



Source: CENTR Domain Statistics, Hosterstats.com, VeriSign Industry Brief (August 2011), LACTLD



In 2011…

1. ccTLDs constituted 39.1% of the global TLD market share (75% of which was the top 20)
2. Median growth for ccTLDs was over 10%
3. 216 million domains – less than 20 gTLDs

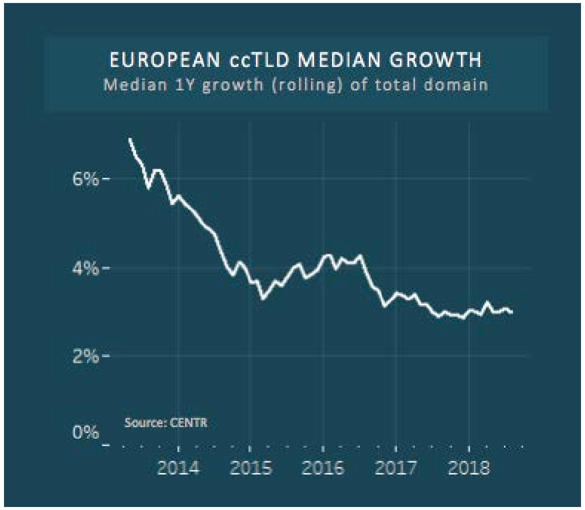
Source: CENTR DomainWire Stat Report (Autumn 2011)

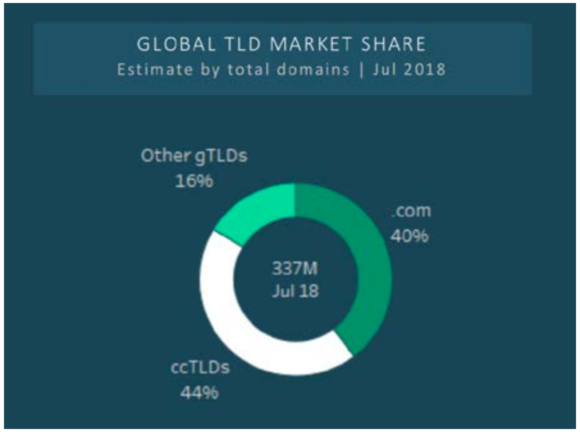
Domain Landscape: Now

GLOBAL MARKET | JUL 2018

Estimate domains/growth of all TLDs*

		Domains (est. million)	Median* Growth (1Y)
ccTLDs	Africa (58)	3.3	8.7%
	Americas (53)	13.8	2.2%
	Asia (98)	59.2	3.3%
	Europe (57)	72.0	3.1%
gTLDs (1,203)		188.9	13.0%
		337.3	





In 2018..

1. ALL ccTLDs combined constitute 44% of the global TLD market share
2. The median growth rate has dropped – 3.1% for Europe
3. 337 million domains – 1,000+ nTLDs in the market

Source: CENTR Q2 2018 Global TLD Report

Our Marketing Approach

- Traditional channel management with registrars
  - Team of channel managers that work with the key registrars within their designated territories

- Marketing programs for all registrars
  - Currently 7 concurrent programs running for the various TLDs
  - Registrars incentivized to promote and increase volume

- Regional market approach (beyond key registrars)
  - China
    - Host an annual summit with a focus on education about domains/industry
  - Europe and North America
    - Mature markets, so our tactic is the more traditional
  - Developing areas
    - Less focus on registrars and more on understanding how the market functions (i.e. attend regional organizations)

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nTLD Verticals

We have ‘community managers’ that focus on branding/marketing for niche and targeted TLDs.

For example:
.BIO/.ORGANIC/.GREEN

- Community outreach – brands, suppliers
- Expos and fairs for organic goods in core countries
- Partnership with IFOAM (International federation for organic agriculture)

But the domain industry has shifted….

nTLDs are a factor, but not the only one..

- Stagnation of domain growth
  - Peak of organic growth for ccTLDs?
  - Global downward trend – stronger impact on non-COM gTLDs (.INFO, .NET, .BIZ)
  - Expansion of industry players – redistribution
- Increased usage of social media
  - Simple and more widely used
- Increased competition from nTLDs
  - Vertical markets equally or more relevant than ccTLD
  - Easier to register and more inexpensive (no verification process etc)
- Pivot from localization to vertical/keyword
  - Perhaps it’s not that ccTLDs lost buyer trust, but that locality is no longer the central identifying factor

Final Thoughts

- It’s a challenge for the industry as a whole
  - Role and importance of domain names amidst the increased use of social media
  - Saturation or maturation?
    - .UK – despite .UK launch, they’ve only added 3mil domains since 2011
    - .PL – dominate with 73% share of the Polish market and with registrars that have little nTLD focus, yet growth has still stagnated
- We need to rethink the TLD metrics that define success
  - Volume vs usage. Renewal rates. Spam/pricing.

Thanks for listening!

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