Session 3:
Administrative Workshop
Romancing with Financing

ccTLD Stats and Trends
THE ccTLD MARKET

Global ccTLDs

- 143 million domains over 260 ccTLDs globally
- Combined growth 5.8% in 2015

APTLD ccTLDs

- 28 million domains combined over 40 ccTLDs and IDN ccTLDs
- Combined growth 26% (YoY)
- Median growth 10.8%

### MARKET UPDATE

<table>
<thead>
<tr>
<th></th>
<th>APTLD</th>
<th>CENTR</th>
<th>Legacy gTLDs</th>
<th>New gTLDs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combined Domains</td>
<td>27.8 M</td>
<td>72.1 M</td>
<td>160.8 M</td>
<td>11.8 M</td>
</tr>
<tr>
<td>Growth (combined) 2015</td>
<td>26.8%</td>
<td>3.0%</td>
<td>5.7%</td>
<td>180%</td>
</tr>
<tr>
<td>Growth (Median) 2015</td>
<td>10.8%</td>
<td>3.9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median Renewal 2014</td>
<td>77%</td>
<td>84%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### COMBINED (APTLD) DOMAINS & GROWTH
ccTLD GROWTH TRENDS

• 2 year trends show increases in 2014 and decreases in 2015
• Median growth in 2015 10.8%
• Trend: downward

<table>
<thead>
<tr>
<th>Median (2015)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Above 1 million</td>
<td>2.5%</td>
</tr>
<tr>
<td>300K - 1 million</td>
<td>14.3%</td>
</tr>
<tr>
<td>Less 300K</td>
<td>11.0%</td>
</tr>
</tbody>
</table>

Sample for Median rates: .au .cn .hk .id .ir .jp .kr .kz .my .nu .nz .qa .sa .sg .th .tw .vn
ccTLD GROWTH TRENDS

• 2 year trends show increases in 2014 and decreases in 2015
• Median growth at 9.9% (Feb16)
• Trend: negative
• Long-term highlights diverse nature of APTLD members
ccTLD GROWTH TRENDS

- 2 year trends show increases in 2014 and decreases in 2015
- Median growth at 9.9% (Feb16)
- Trend: negative
- Long-term highlights diverse nature of APTLD members
- Individual rates help benchmarking with peers
CREATE AND RENEWS

• Creation and Retention rates can show relative positions and maturity of ccTLDs
• APTLD members are dispersed
• Median Creation: 27%
• Median Retention: 77%
• Europe trend: stability in retentions, decreased creations

Retention rate = (Domains at end of n - new domains created during n) / Domains at beginning of n
Creation rate = New domains added in period n / total registrations at end of n
TLD MARKET SHARE

• Average market share of national ccTLD is 44% (Range 8%-72%)
• New gTLDs represent, on average, 3.6% of a country TLD distribution
TLD MARKET SHARE

• Average market share of national ccTLD is 44% (Range 8%-72%)

• New gTLDs represent, on average, 3.6% of a country TLD distribution

• gTLDs (legacy and new) have greater market penetration in Asia Pacific
TLD MARKET SHARE

- Average market share of national ccTLD is 44% (Range 8%-72%)
- Benchmarked against Europe, gTLDs (legacy and new) have greater market penetration in Asia Pacific
- Roughly 63% of .club domains have been registered from AP countries.

<table>
<thead>
<tr>
<th>LARGEST NEW GTLD BY COUNTRY</th>
<th>China</th>
<th>.club</th>
<th>291,851</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>.click</td>
<td>85,671</td>
<td></td>
</tr>
<tr>
<td>Hong Kong</td>
<td>.club</td>
<td>12,269</td>
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<tr>
<td>Australia</td>
<td>.club</td>
<td>11,118</td>
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<tr>
<td>New Zealand</td>
<td>.kiwi</td>
<td>8,439</td>
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<tr>
<td>Indonesia</td>
<td>.casa</td>
<td>7,535</td>
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<tr>
<td>Korea, Republic of</td>
<td>.date</td>
<td>1,054</td>
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<tr>
<td>Vietnam</td>
<td>.club</td>
<td>717</td>
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<td>Thailand</td>
<td>.club</td>
<td>695</td>
<td></td>
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<td>United Arab Emirates</td>
<td>.club</td>
<td>673</td>
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<td>Singapore</td>
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<td>Taiwan</td>
<td>.club</td>
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<td>Malaysia</td>
<td>.club</td>
<td>282</td>
<td></td>
</tr>
<tr>
<td>Iran</td>
<td>.host</td>
<td>11</td>
<td></td>
</tr>
</tbody>
</table>
REGISTARS with gTLDs

- ICANN accredited registrars have strong presence in Asia Pacific
- Many APTLD members also act as registrar for own ccTLD
- Example:
  - Top 5 largest ICANN acc registrar in China manage over 10 million gTLD domains.
ccTLD PRICING

- Median price (APTLD) = 11.4 USD
- Median price (Europe) = 7.8 USD (6.9 EUR) & *trending down*
- Moderate negative relationship between price and total domains
ENGAGEMENT WITH ICANN

- ccTLDs in South and Central Asia have less ‘ICANN agreements’
ENGAGEMENT WITH ICANN

• ccTLDs in South and Central Asia have less ‘ICANN agreements’

• Most APTLD members are also ccNSO members
• Average zone file roughly 63% commercial registrants

• Most members are not for profit private companies

• Most members derive 90% or more revenue income from domain registrations

• APTLD members on average have more local presence (registrant) requirements than other regions

• Marketing: More than half of members rely to a large extent (some completely) on registrars to promote their ccTLD
SUMMARY - ccTLDs in Asia Pacific region

• Growth trends are diverse.
  • Mid size ccTLDs grew well in 2015.
  • Large ccTLDs grew slowly in 2015 similar to their peers globally
• Members have limited to moderate engagement with ICANN (mostly ccNSO)
• Prices are similar to ccTLDs in other regions
• Signs of increased new gTLD penetration in member countries.
• ICANN accredited registrars active in Asia Pacific
• Higher local presence requirements than other regions

More detail on all stats plus individual ccTLD data will be available in 2016 Annual Stat Survey report
DATA CAPTURE METHODS

Surveys
Annual and ad-hoc surveys initiated by APTLD or member

Manual 😞
Via member websites and email communication

Automated 😊
Member sets up simple XML file with basic data on counts, IDNs, DNSSEC etc

<domain_counter><tld suffix="xy" timestamp="2015-08-18T05:10:01"> <current_total>100</current_total> <newadds_previousmonth>100</newadds_previousmonth> <current_total_dnssec>100</current_total_dnssec> <current_total_IDN>100</current_total_IDN> </tld></domain_counter>

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