

2015 – 2nd Quarter Review

gTLD Statistics & Business Implications

.TBA



Overview

2014 Recap

- Circa pre-2012 & 2012 gTLD statistics

2015 1st Quarter

- Circa pre-2012 & 2012 gTLD statistics

Post - 2012 gTLD Tiers Business Implications

- Volumes & Values new gTLDs can expect
- Correlation between Prices, Volumes, etc.
- Impact on registry financials
- Business models considerations – additional value adds/value proposition over registrations

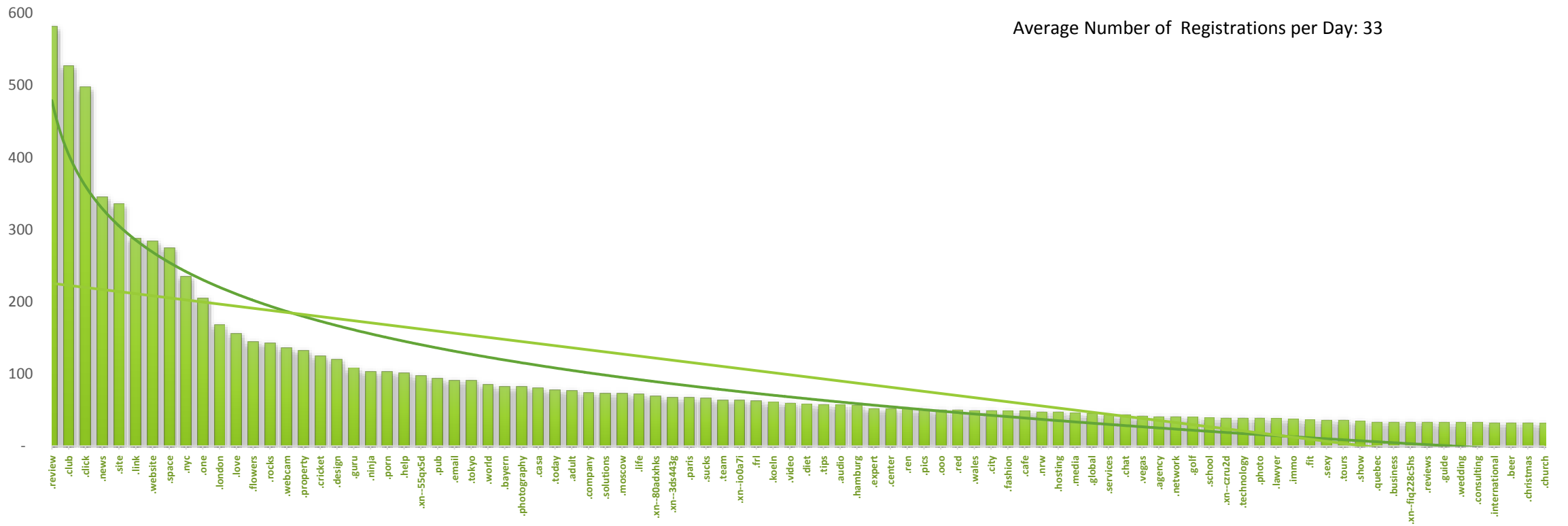
Circa 2012 gTLD Tiers Business Implications

The Caveats

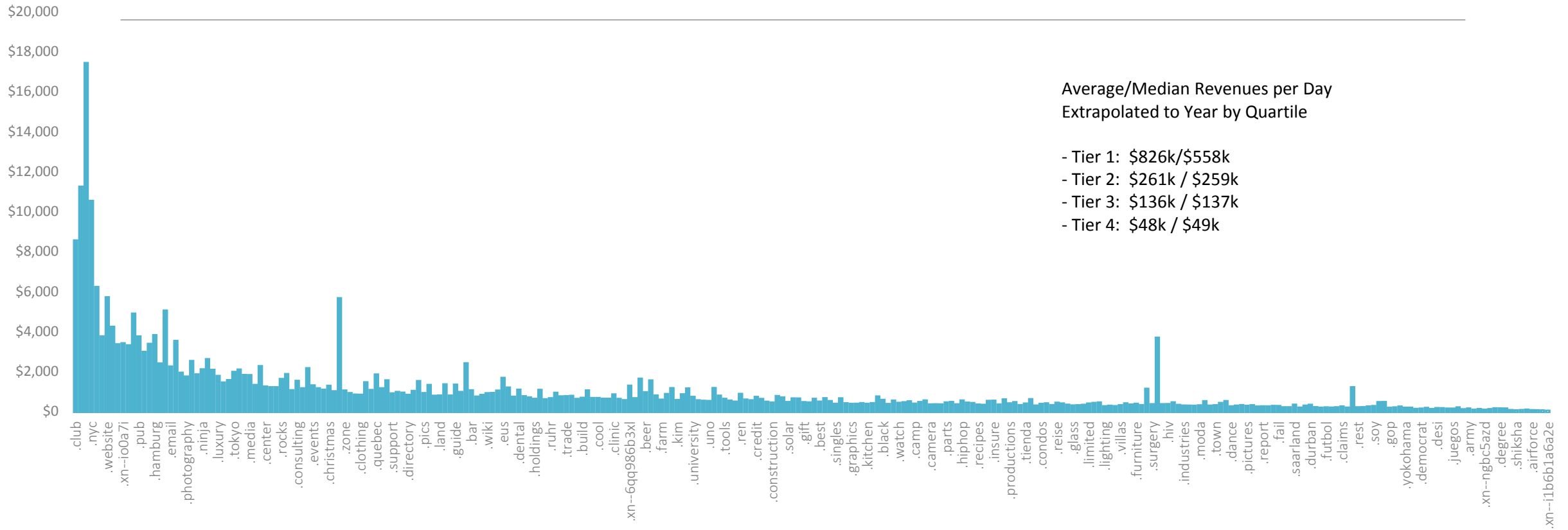
- TLDs with known free registrations have been excluded from the analysis (.XYZ, .BERLIN, .OVH, etc.)
- ‘Free’ registrations can be a viable business plan but as we have no viable, reliable renewal statistics they have been excluded from any calculations
- Expectation that renewal rates from free registrations will vary be from regular paid registrations
- Many registries have registered their own names thereby inflating the number of true, arms-length third-party registrations
- Legitimate reasons for registries to do this include increasing the ability for potential registrants to find and purchase premium names
- TLDs that have entered General Availability within the last 60 days are not included to eliminate any upswings

gTLDs in Terms of Volume

Average Number of Daily Registrations June 30, 2015



gTLDs in Terms of Revenues



Top 25 gTLDs by Retail Revenues to Date

Rank	TLD	Retail Revenues	Rank	TLD	Retail Revenues
1	.club	\$ 3,570,668	13	.WEBCAM	\$ 1,294,741
2	.london	3,295,773	14	.PROPERTY	1,190,463
3	.xn--czru2d	3,252,925	15	.HAMBURG	1,163,656
4	.nyc	2,783,395	16	.SOLUTIONS	1,093,135
5	.xn--55qx5d	2,508,596	17	.PARIS	1,053,237
6	.guru	1,901,113	18	.EMAIL	1,023,279
7	.website	1,624,856	19	.VEGAS	1,006,294
8	.link	1,468,539	20	.GLOBAL	995,899
9	.xn--io0a7i	1,370,445	21	.XN--CZR694B	954,324
10	.expert	1,352,291	22	.TODAY	945,589
11	.bayern	1,327,707	23	.PHOTOGRAPHY	864,831
12	.pub	1,325,392	24	.VOTING	854,777
			25	.COMPANY	853,611

***Retail revenues are based on the average retail values obtained from: GoDaddy, United Domains and 101Domains. Data from other registrars were used if pricing was not available at one of these three sources. TLDs have to be in GA for 60 days to eliminate initial sales bump. Excludes Premium Name revenues.*

Top 25 gTLDs by Volumes to Date

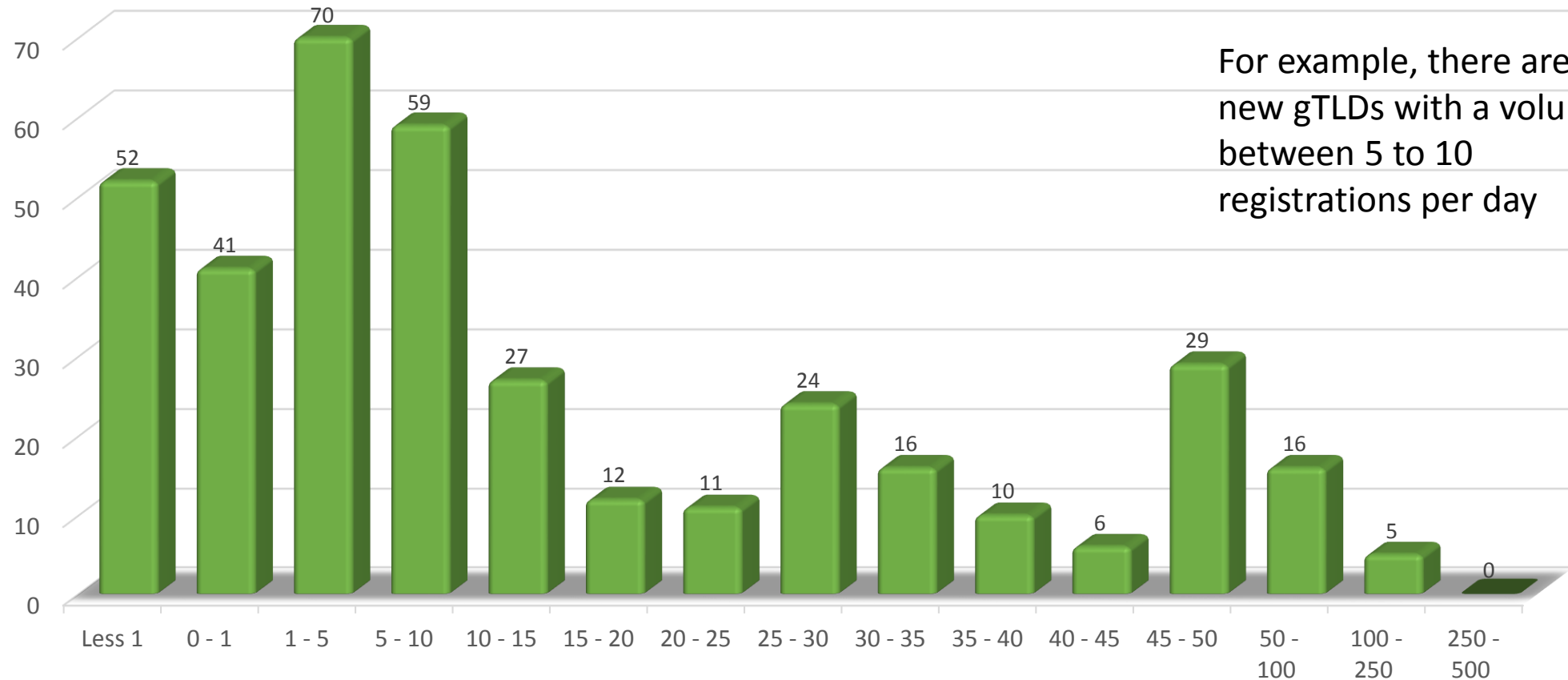
Rank	TLD	Total Volume	Rank	TLD	Total Volume
1	.CLUB	251,146	13	.PHOTOGRAPHY	47,149
2	.LINK	128,033	14	.TODAY	44,514
3	.WEBSITE	84,452	15	.PUB	41,107
4	.NYC	80,115	16	.PROPERTY	40,137
5	.CLICK	76,764	17	.TOKYO	39,369
6	.GURU	65,012	18	.COMPANY	39,260
7	.LONDON	62,488	19	.SOLUTIONS	38,032
8	.WEBCAM	61,669	20	.SPACE	37,446
9	.ROCKS	54,365	21	.XN--3DS443G	35,715
10	.XN--55QX5D	52,377	22	.XN--IO0A7I	34,304
11	.NINJA	50,612	23	.TIPS	32,622
12	.EMAIL	47,611	24	.BAYERN	29,076

gTLD Results Top 10 & Top 25

	Registration Revenue	Registration Volume
Top 10 TLDs:	18%	27%
Top 25 TLDs:	33%	44%
Average per TLD:	\$ 319,221	10,315

Number of gTLDs by Average Daily Registration Volume

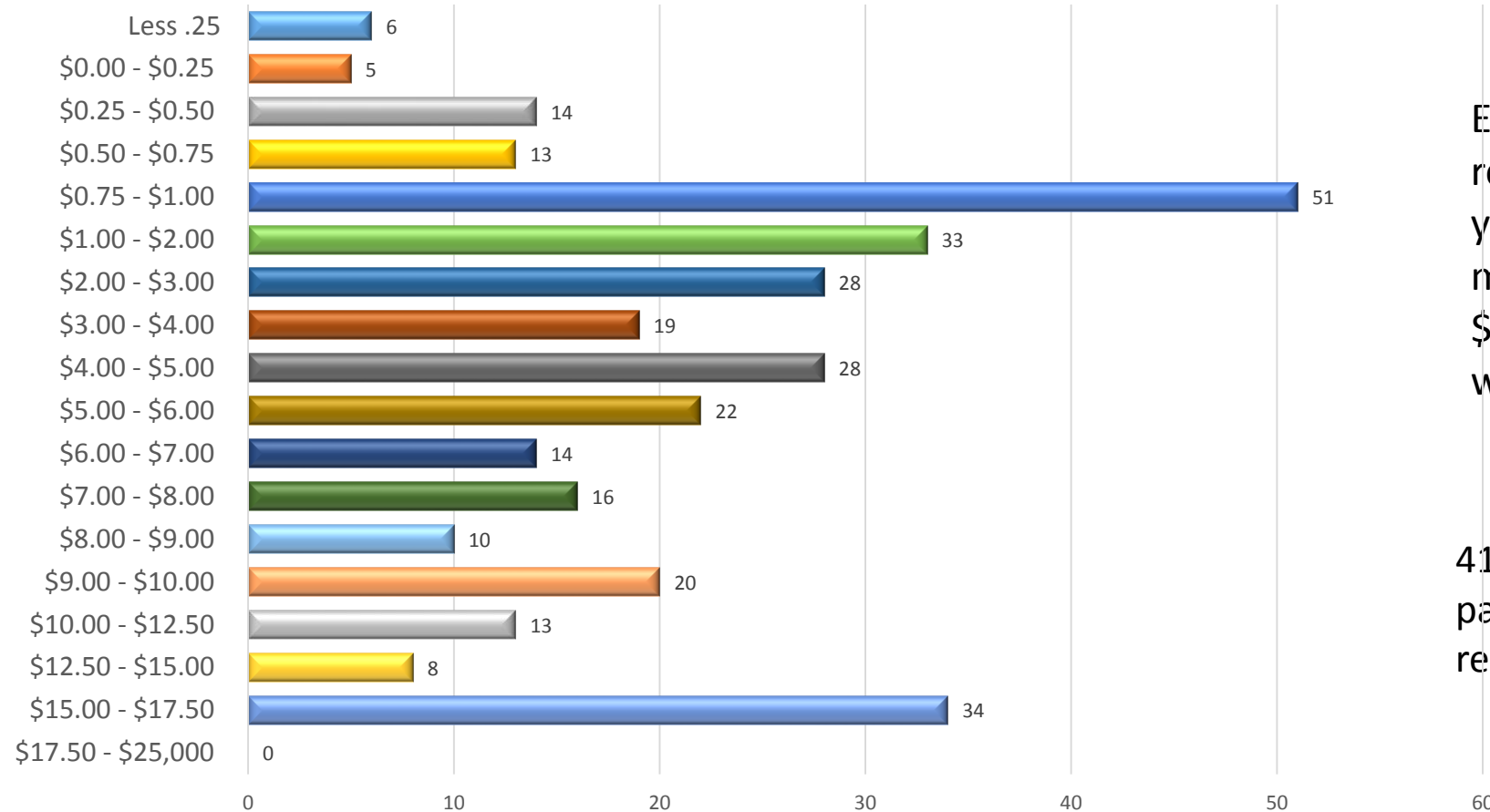
Average Daily Volume by TLD



For example, there are 59 new gTLDs with a volume between 5 to 10 registrations per day

Projected ICANN Registration Fees

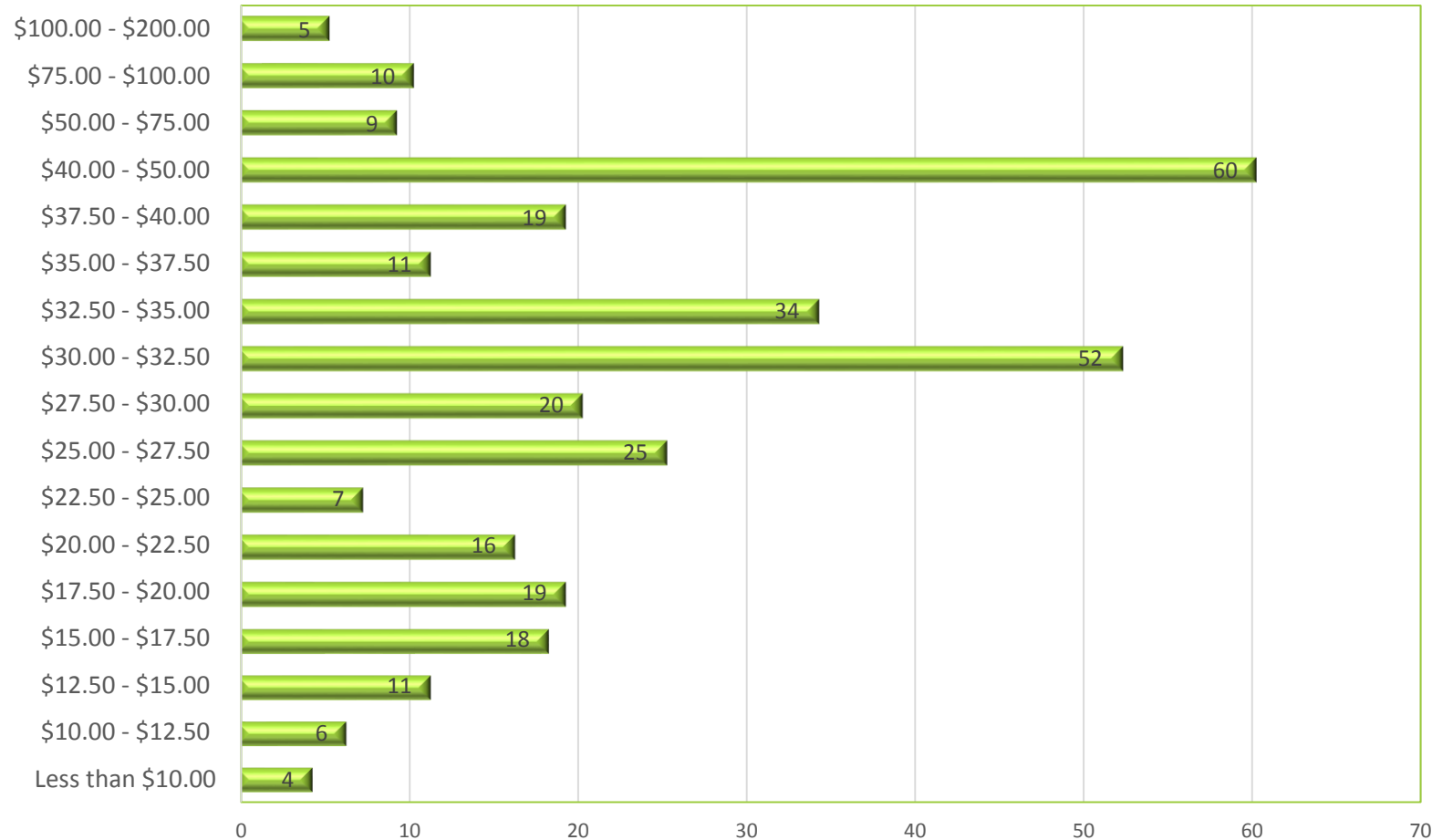
TLDs by ICANN Fee per Domain Year Registration



Extrapolating current registration volumes for a one year period, the ICANN minimum registration fee of \$0.25 per domain registration will apply to 6 TLDs.

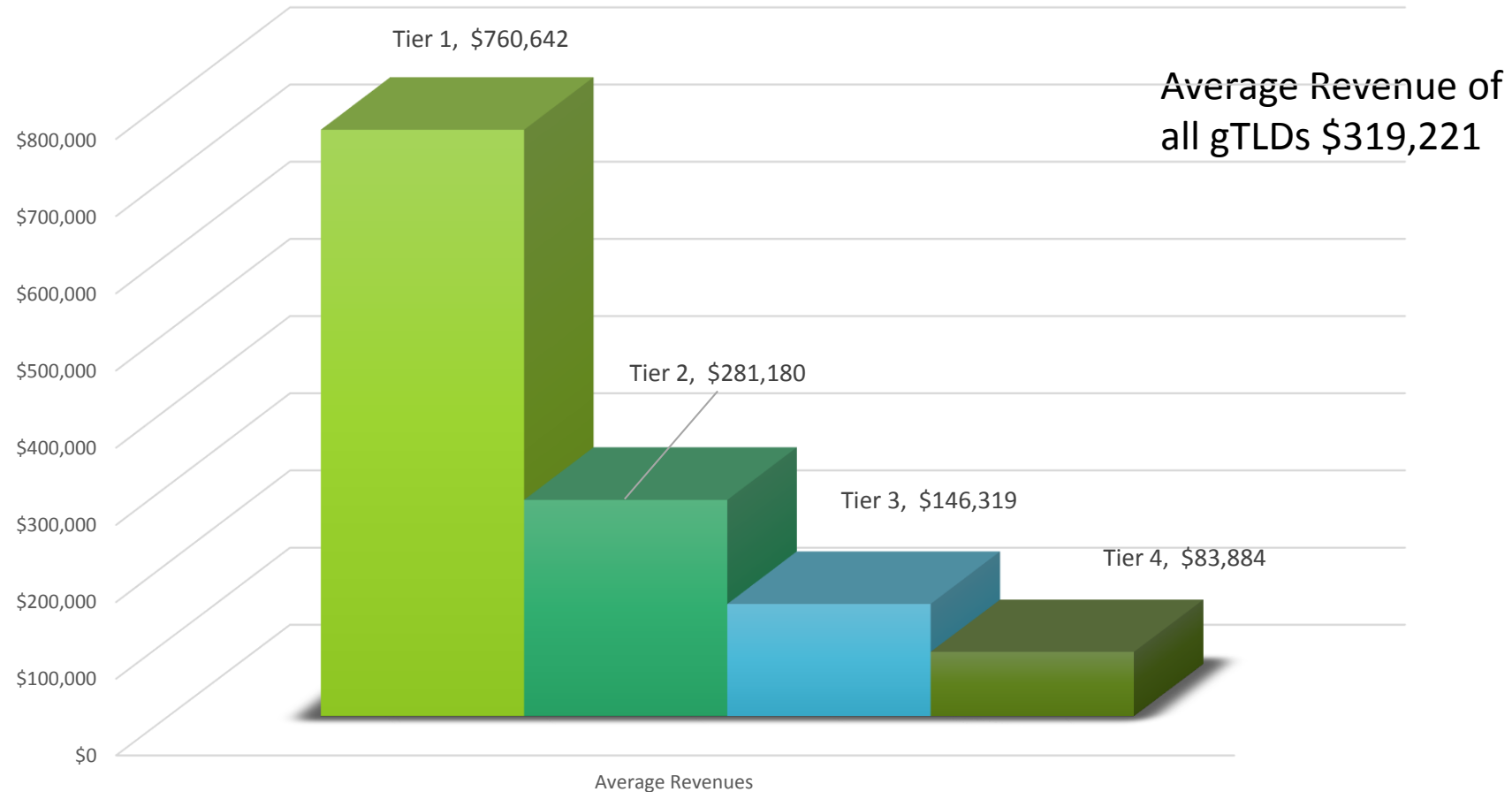
41% of all new gTLDs in GA are paying \$5 or more per domain registration

How Many new gTLDs are Selling within a given Price Range?



For example, there are currently 60 new gTLDs with an average retail price between \$40 - \$50

Average Retail Revenues by Tier



Pricing

To date, the new gTLDs with the highest volumes and values have not improvised by being cheaper.

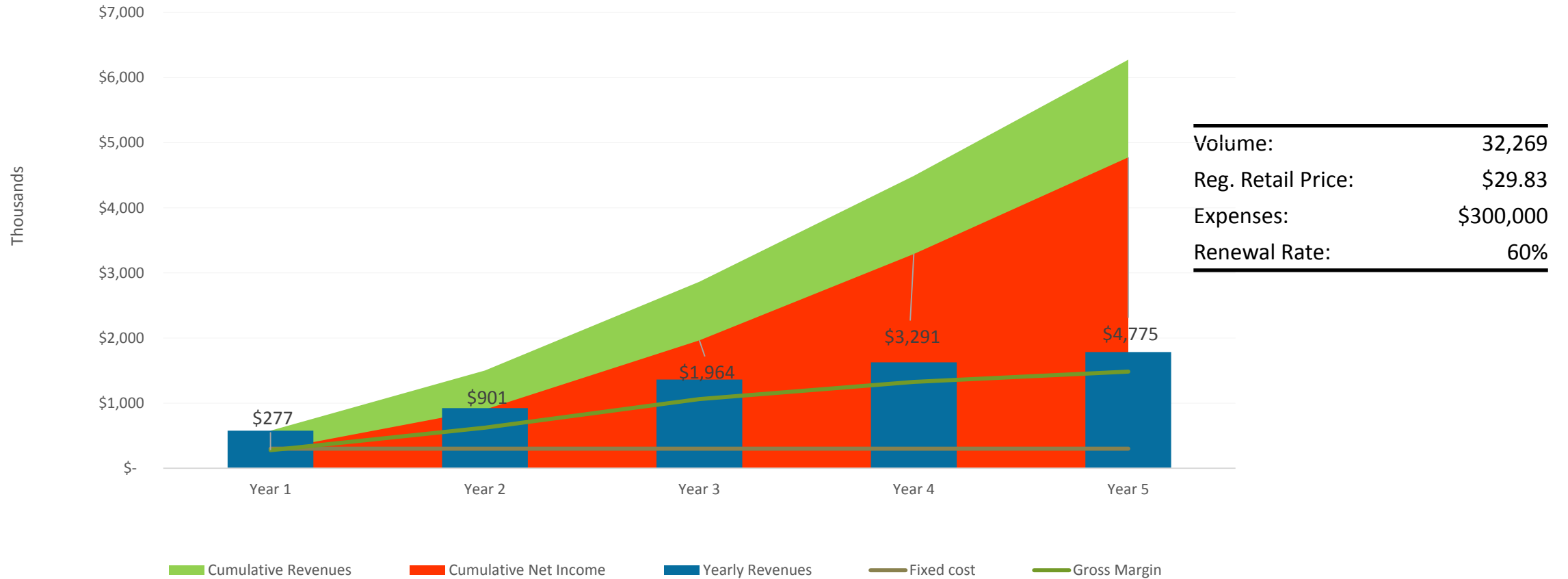
Tiers	Average Retail Price	Median Price
1	\$ 29.83	\$ 29.45
2	\$ 39.38	\$ 33.49
3	\$ 43.51	\$ 35.24
4	\$ 95.00	\$ 42.49

Is there a Correlation between Price & Volume?

Period	Correlation	Significance
Q2 2015 – Overall	-0.08	Strong relationship
Q2 2015 – Tier 1	-0.27	Moderate negative relationship
Q2 2015 – Tier 2	0.11	No or negligible relationship
Q2 2015 – Tier 3	-0.13	Weak negative relationship
Q2 2015 – Tier 4	-0.17	Weak negative relationship
Q4 2014 - Overall	-0.23	Weak negative relationship

Financial Implications: Tier 1 Today

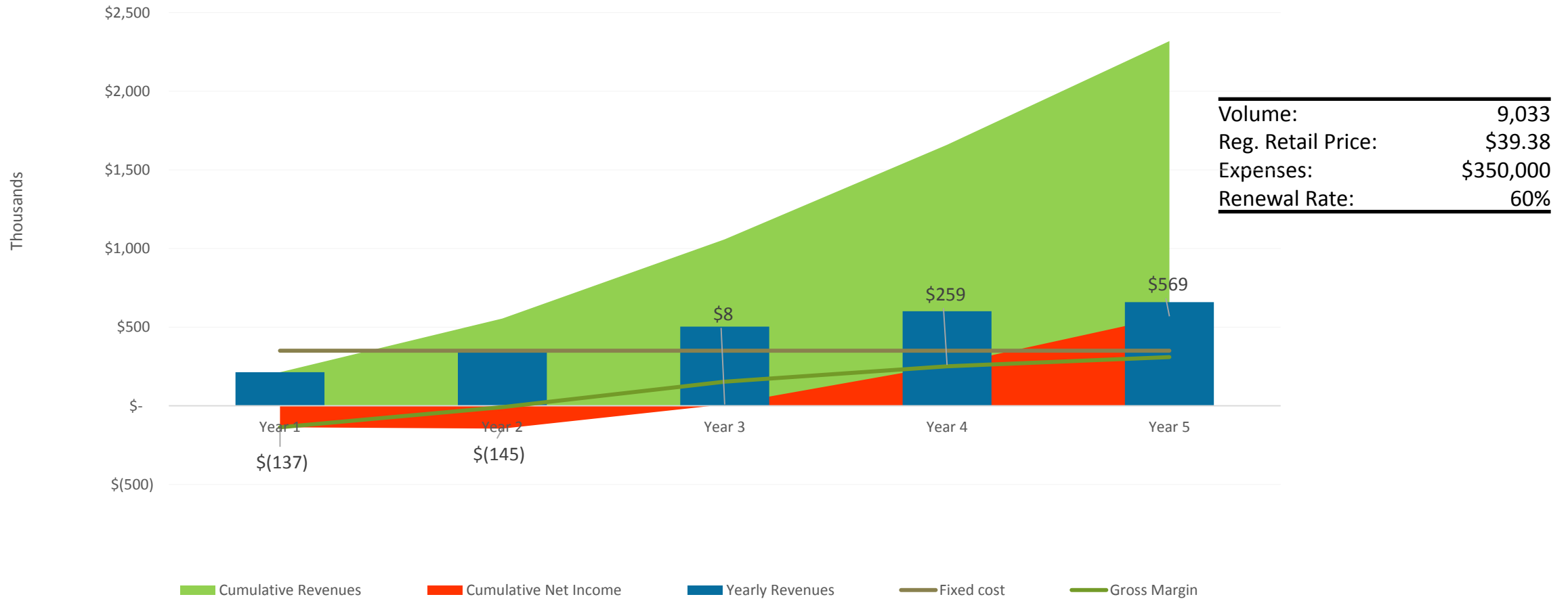
Tier 1: Today



The price and volume is unique to its own tier along with the associated projected expenses

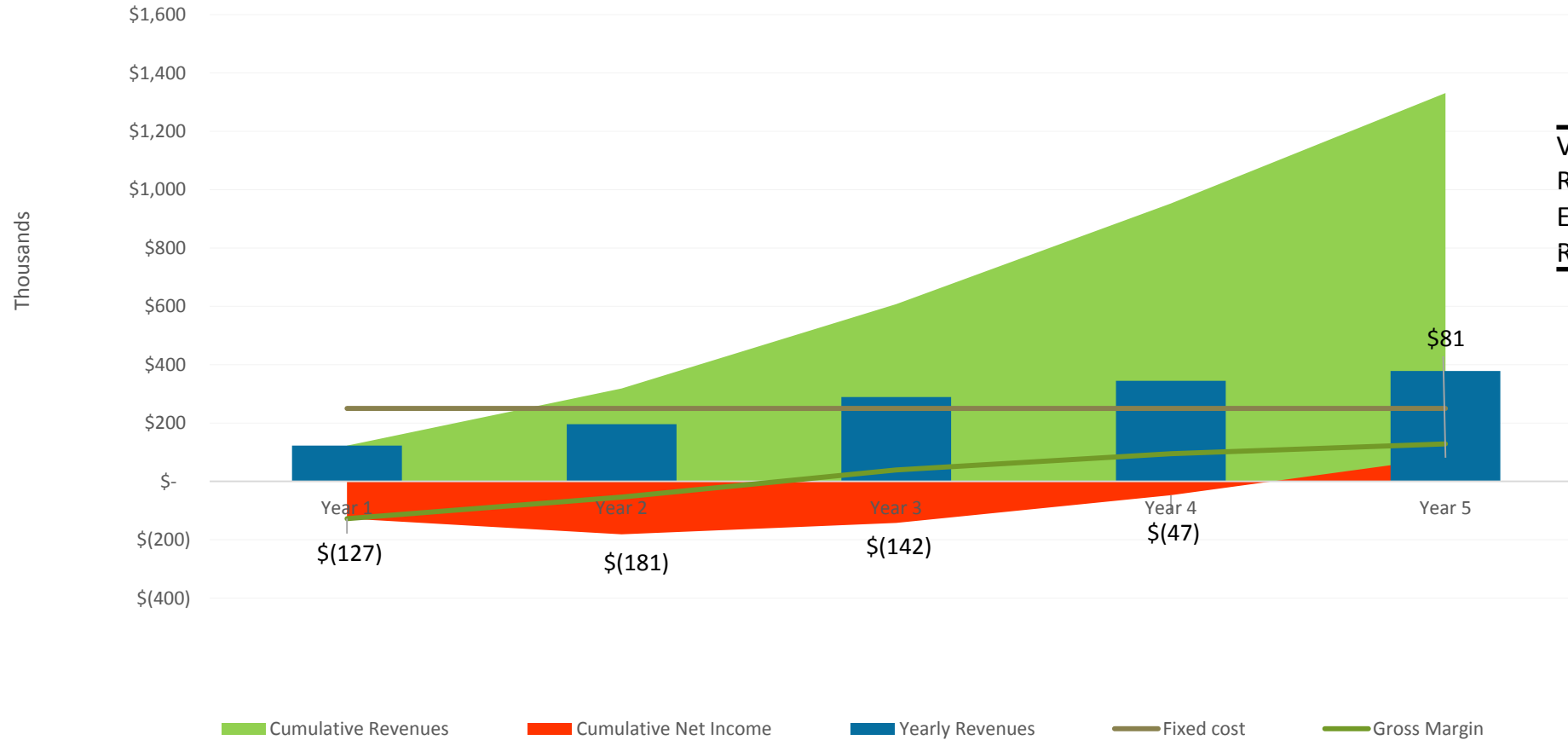
Financial Implications: Tier 2 Today

Tier 2: Today



Financial Implications: Tier 3 Today

Tier 3: Today

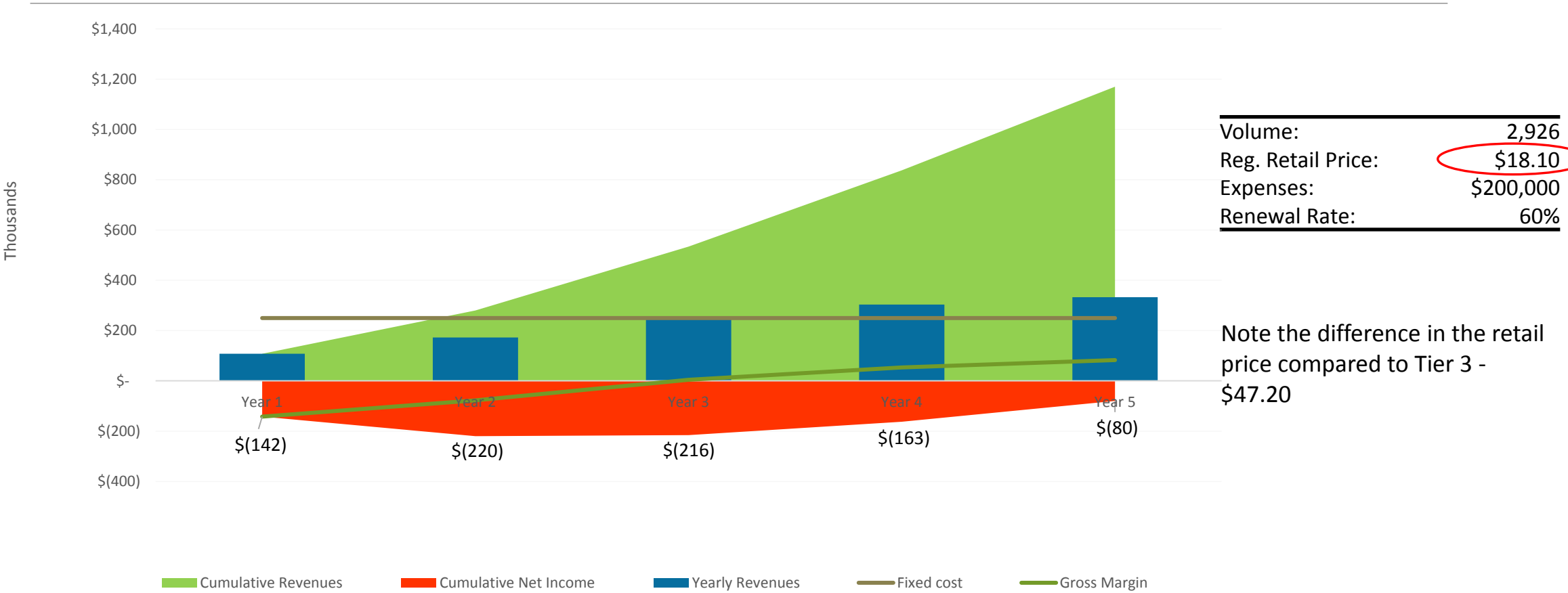


Volume:	4,693
Reg. Retail Price:	\$43.21
Expenses:	\$250,000
Renewal Rate:	60%

Note the difference in the retail price compared to Tier 2 - \$26.60

Financial Implications: Tier 4 Today

Tier 4: Today



Quarterly Review Schedule

Event	When & Where
2015 – Q3	October, Podcast
2015 – Q4 & 2015 Year in Review	NamesCon

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