ICANN

gTLD
Marketplace Health Index
(Beta)

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Contents

gTLD Marketplace Health Index (Beta)

Note: The gTLD Marketplace Health Index (Beta) is intended to serve as a basis for community discussion and collaboration for further developing the gTLD Marketplace Health Index. ICANN plans to publish updated data for these beta version metrics biannually until work on the gTLD Marketplace Health Index 1.0 is complete.

The gTLD Marketplace Health Index presents statistics and trends related to generic top-level domains (gTLDs). ICANN republishes these statistics semi-annually to track progress against its goal for the domain name marketplace to be robust, stable and trusted. To guide the creation of metrics, ICANN has defined each part of the goal:

Robust Competition:
- Diversity exists in the choice of a service provider, including:
  - Geography
  - Scripts offered
  - Service model*
  - Languages offered*

- The commercial marketplace is thriving – demonstrated by growth in new gTLDs and across all gTLDs.

- The marketplace is open to new players.

- Marketplace competition is perceived to be fair.*

- The marketplace is not dependent on one or a small number of players.*

Marketplace Stability:
- More gTLD registrars and gTLD registry operators are entering the gTLD marketplace than are leaving.

- Service providers are reliable, setting consistent expectations and meeting levels of service for: gTLD registrants, Internet users and the global community (including gTLD registry operators, gTLD registrars, law enforcement and intellectual property holders).*

Trust:
- Service providers, gTLD registry operators, gTLD registrars and gTLD registrants are:
  - Compliant with their contractual obligations
  - Perceived to be trustworthy*

*The gTLD Marketplace Health Index (Beta) does not include metrics for these goals. It is expected that through community input, these goals and metrics will be refined and that subsequent versions of the index will contain the metrics for these goals. See page 14 for a list of additional proposed metrics for community consideration.
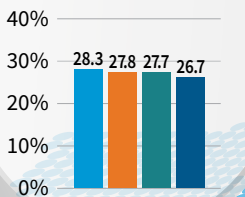
Robust Competition

Geographic Diversity

The metrics in this section track the geographic diversity of gTLD registry operators and registrars by examining their physical presence in each ICANN region and by legal jurisdiction (as defined by the ISO 3166 standard). The location for each gTLD registrar and registry operator is determined by the mailing address on record with ICANN. These numbers may not reflect every jurisdiction where an ICANN-accredited gTLD registrar or gTLD registry operator has a physical presence because these entities may have a presence in jurisdictions besides their primary office address. ICANN presents these numbers as a starting point for discussion, and aims to expand these metrics in the future to account for additional contacts within a jurisdiction (e.g. satellite offices, local affiliates, resellers).

Percentage of Distinct ICANN-Accredited gTLD Registrars, by ICANN Region
This metric tracks the percentage of distinct ICANN-accredited gTLD registrars having a primary contact address in the identified ICANN region. In calculating this metric, each gTLD registrar family with a primary contact address in the region is counted once, then added to the number of independent gTLD registrars in the region.
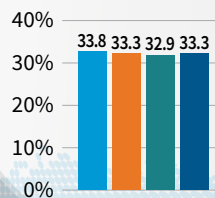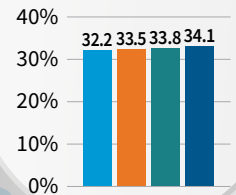

Figure 1

Percentage of Distinct ICANN-Accredited gTLD Registry Operators, by ICANN Region

This metric tracks the percentage of distinct gTLD registry operators having a primary contact address in the identified ICANN region. In calculating this metric, each gTLD registry operator family with a primary contact address in the region is counted once, then added to the number of independent gTLD registry operators in the region.

NORTH AMERICA

2014 H1	2014 H2	2015 H1	2015 H2
30.1	27.3	22.9	26.3

EUROPE

2014 H1	2014 H2	2015 H1	2015 H2
42.7	45.5	43.0	42.1

ASIA/AUSTRALIA/PACIFIC

2014 H1	2014 H2	2015 H1	2015 H2
23.3	23.6	30.1	27.9

LATIN AMERICA/CARIBBEAN

2014 H1	2014 H2	2015 H1	2015 H2
1.9	2.4	2.5	2.6

AFRICA

2014 H1	2014 H2	2015 H1	2015 H2
1.9	1.2	1.4	1.1

Legend:
- 2014 H1
- 2014 H2
- 2015 H1
- 2015 H2
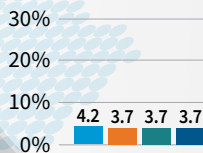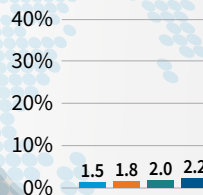
Jurisdictions With at Least One gTLD Registry Operator

2013 H1	2013 H2	2014 H1	2014 H2	2015 H1	2015 H2
6	10	27	33	41	47

Figure 2

Competition

Some ICANN-accredited gTLD registrars and gTLD registry operators operate independently, while others are part of larger families that share the same corporate parent. These metrics track the percentage of distinct entities in the gTLD marketplace. In calculating the metrics, each gTLD registrar or gTLD registry operator family is counted once, then added to the number of independent gTLD registrars or gTLD registry operators.

Percentage of gTLD Registrars That Are Distinct Entities
(Counting Each gTLD Registrar Family Once)

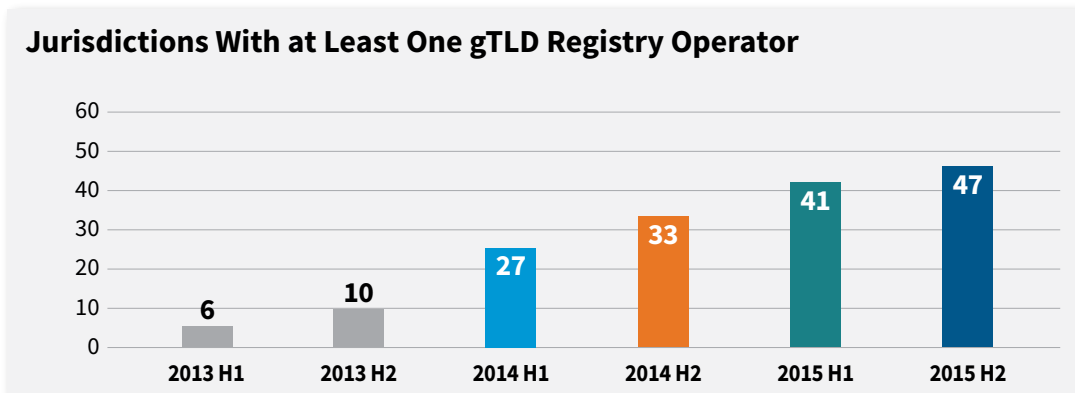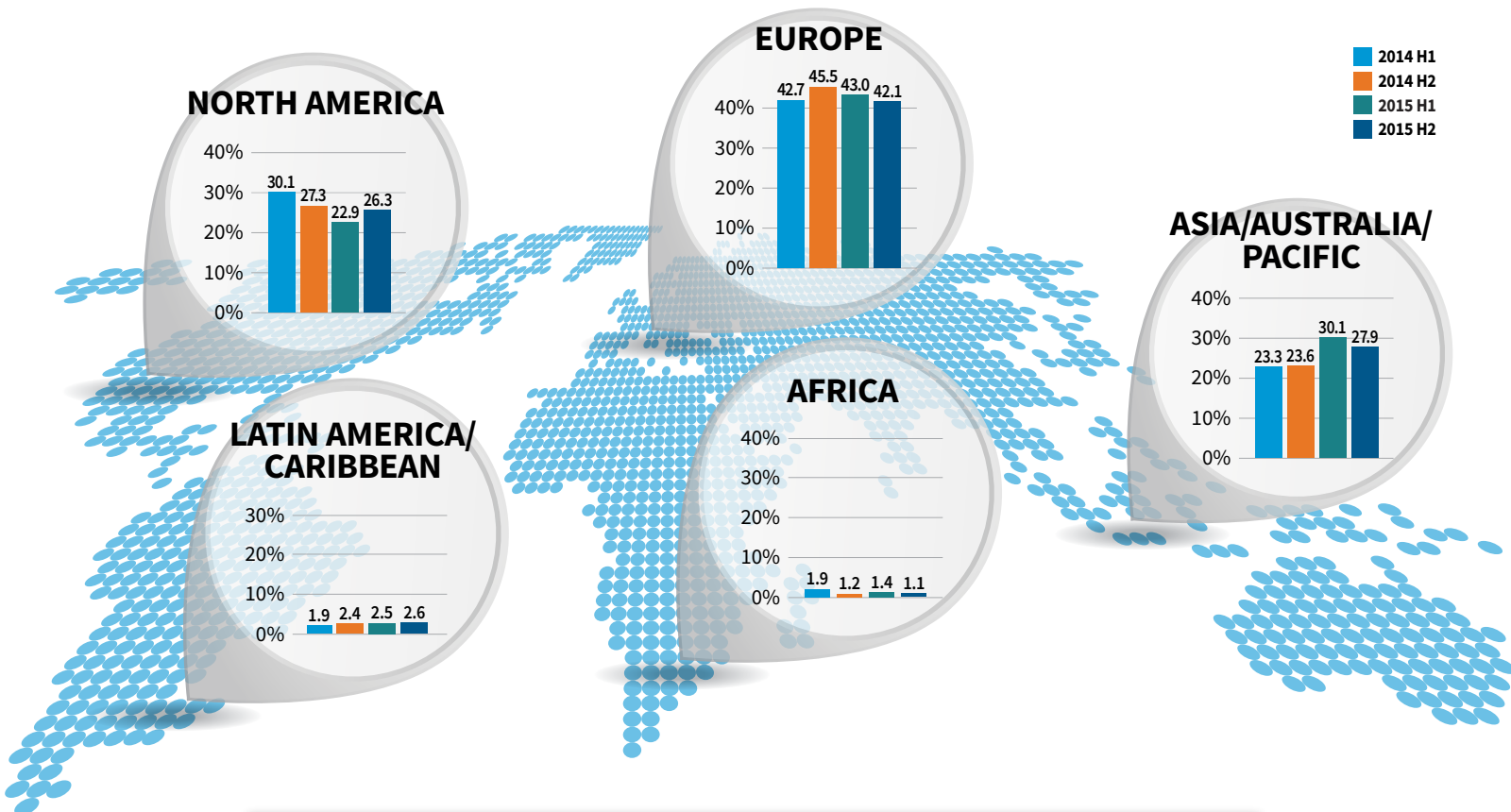| 2014 H1	2014 H2	2015 H1	2015 H2
40.3	31.2	29.7	21.5

Figure 3

Average Number of gTLD Registrar Accreditations Per Registrar Family

2014 H1	2014 H2	2015 H1	2015 H2
2.5	3.2	3.4	4.7

Figure 4

Percentage of gTLD Registry Operators That Are Distinct Entities
(Counting Each gTLD Registry Family Once)

2014 H1	2014 H2	2015 H1	2015 H2
30.4	33.1	39.8	42.2

Figure 5

Average Number of gTLD Registries Held by Each gTLD Registry Parent Company

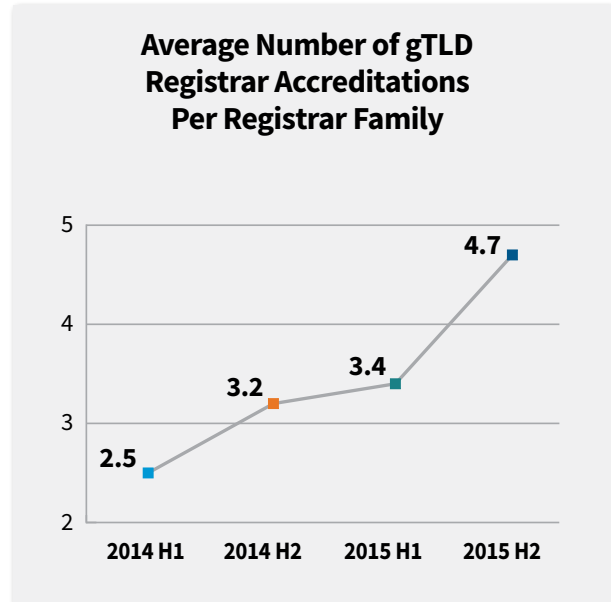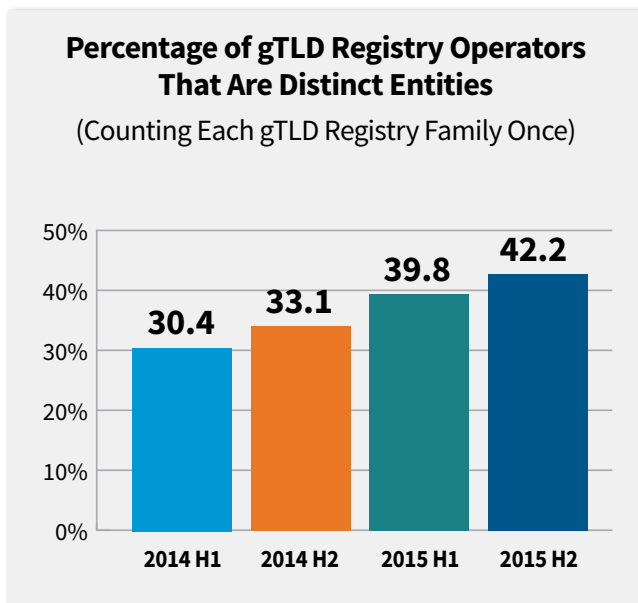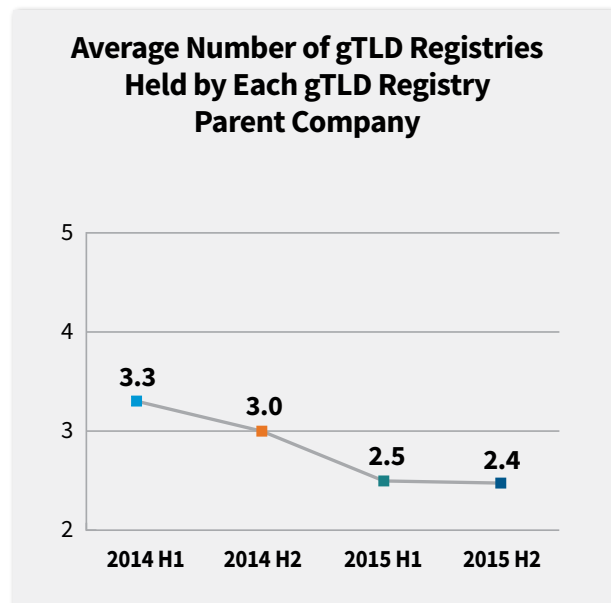| 2014 H1	2014 H2	2015 H1	2015 H2
3.3	3.0	2.5	2.4

Figure 6

■ 2014 H1   ■ 2014 H2   ■ 2015 H1   ■ 2015 H2

gTLDS – Total

The metrics in this section track the total number of second-level domain names in existence in gTLDs from 2010-2015, as reported to ICANN in monthly transaction reports. The reporting periods run from January to June (H1) and July to December (H2). Additional metrics track the total number of second-level domain name registrations in internationalized gTLDs (IDNs) and the year-over-year growth rates in all second-level domain name registrations in gTLDs from 2010-2015.

Total Number of Second-Level Domain Name Registrations in gTLDs
(in thousands)

2010 H1	2010 H2	2011 H1	2011 H2	2012 H1	2012 H2	2013 H1	2013 H2	2014 H1	2014 H2	2015 H1	2015 H2
122,540	127,694	133,584	138,674	143,696	145,900	148,903	151,224	154,928	158,596	162,726	174,258

Figure 7

Total Second-Level Domain Name Registrations in gTLDs: Year-Over-Year Growth Rates (2010-2015)

2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
8.8	6.4	3.6	4.6	7.3

Figure 8

Total Number of Second-Level Registrations in Internationalized gTLDs (IDNs)

2013 H2	2014 H1	2014 H2	2015 H1	2015 H2
19	66,459	321,394	521,132	530,831

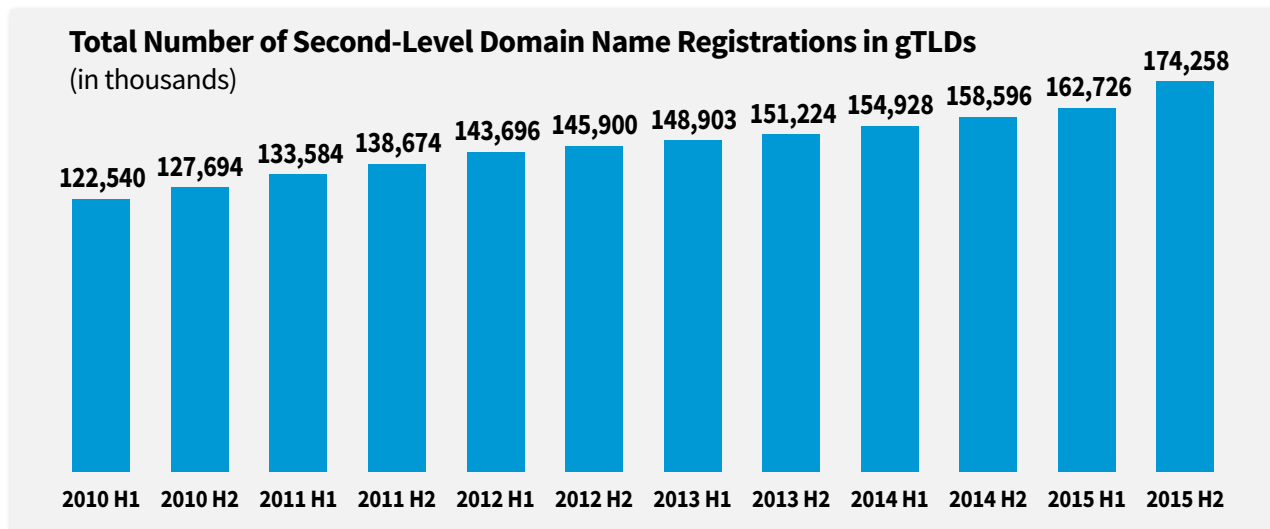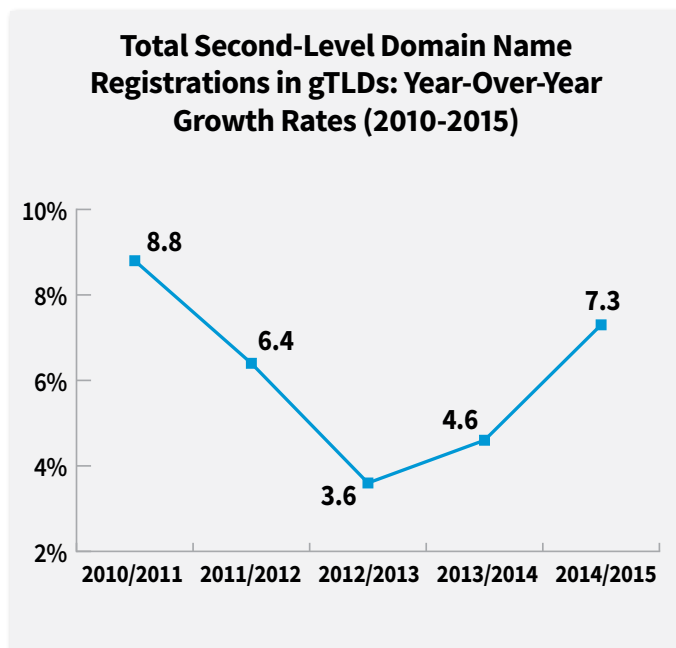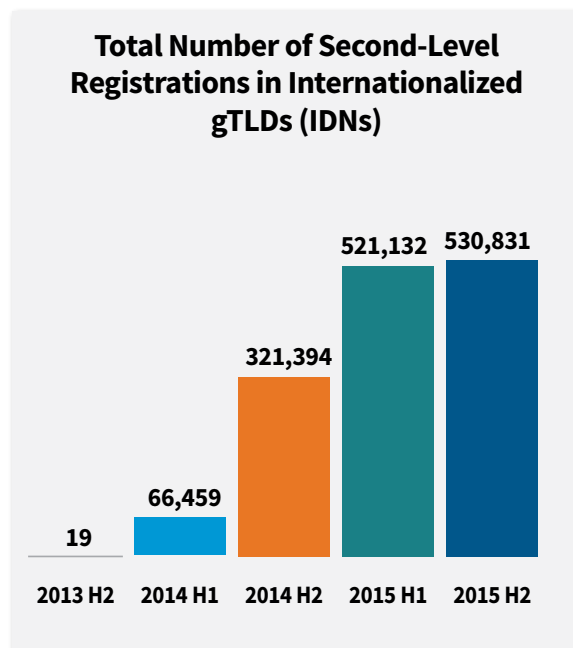*Figure 9*

gTLDS – Additions and Deletions

The metrics in this section show the rate of new second-level domain name registrations in gTLDs (additions) and second-level domain name deletions (excluding deletions during the add-grace period) over time, as reported to ICANN in monthly gTLD transaction reports. The reporting periods run from January to June (H1) and July to December (H2).

Total second-level domain name additions (below) and deletions (on page 8) are shown for each reporting period from 2010-2015, along with the year-over-year growth rates (2010-2015) for additions and deletions. Second-level domain name additions in 2014-2015 are further analyzed (on page 7) by separating the totals into legacy and new gTLDs (with the year-over-year growth rate for each). Second-level domain name additions in 2014-2015 are also broken down into new gTLD categories, where applicable: IDNs, .brands, and geographic gTLDs, with the year-over-year growth rate for each category.

Second-level domain name deletions in 2014-2015 are shown (on page 9) as a percentage of total second-level names deleted in each category. For example, in 2014 H2, the data shows that 10.2 percent of all second-level domain names in gTLDs were deleted, including 1.1 percent of second-level domain names in new gTLDs and 10.4 percent of second-level domain names in legacy gTLDs.

Second-Level Domain Name Additions in gTLDs: Year-Over-Year Growth Rates (2010-2015)

Figure 10

Second-Level Domain Name Additions in gTLDs
(in thousands)

2010 H1	2010 H2	2011 H1	2011 H2	2012 H1	2012 H2	2013 H1	2013 H2	2014 H1	2014 H2	2015 H1	2015 H2
19,867	18,948	20,634	20,082	21,309	19,262	20,828	19,441	21,480	21,496	22,568	30,327

Figure 11

Second-Level Domain Name Additions: Legacy and New gTLDs (in thousands)

	2014 H1	2014 H2	2015 H1	2015 H2
Legacy gTLDs	20,139	19,179	19,730	24,229
New gTLDs – All Categories	1341	2317	2838	6098
Total	21,480	21,496	22,568	30,327

Legacy gTLDs ■ **New gTLDs – All Categories** ■ **Total**

Figure 12

Second-Level Domain Name Additions, Legacy and New gTLDs: Year-Over-Year Growth Rates

2014/2015	
11.8	144.3	23.1

Figure 13

Second-Level Domain Name Additions: IDNs, .brands, Geographic
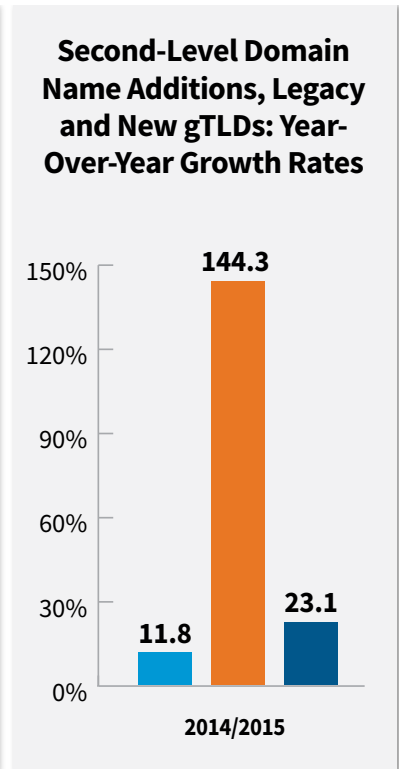
	2014 H1	2014 H2	2015 H1	2015 H2
IDNs	46,734	200,318	217,202	50,095
.brands	44	2617	1339	905
Geographic	239,415	413,370	320,671	197,123
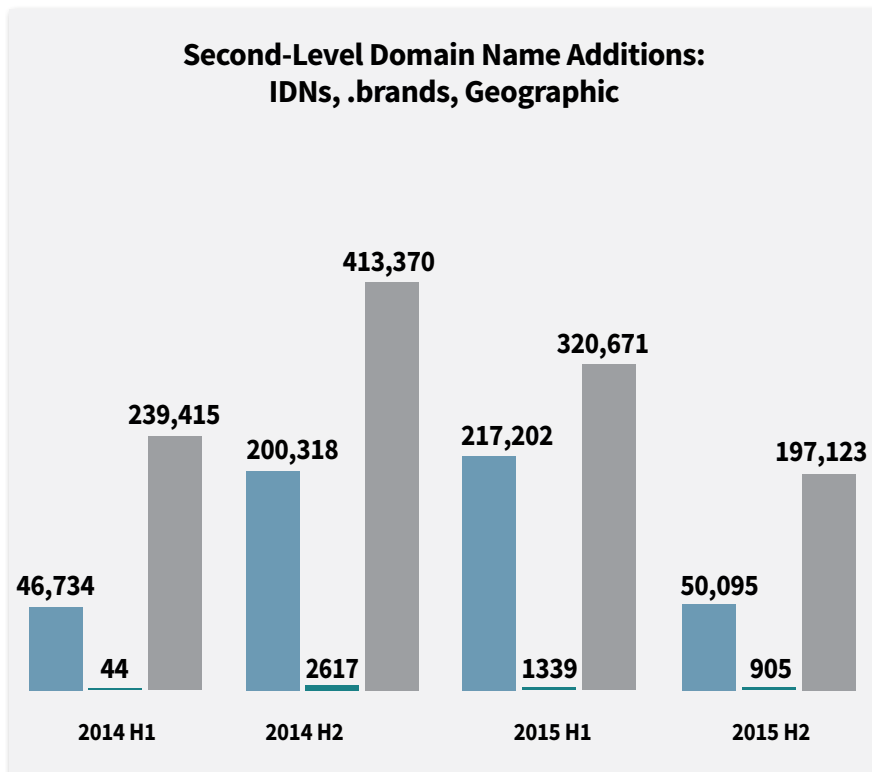
IDNs ■ **.brands** ■ **Geographic**

Figure 14

Second-Level Domain Name Additions, IDNs, .brands, Geographic: Year-Over-Year Growth Rates

2014/2015		
8.2	−15.7	−20.7
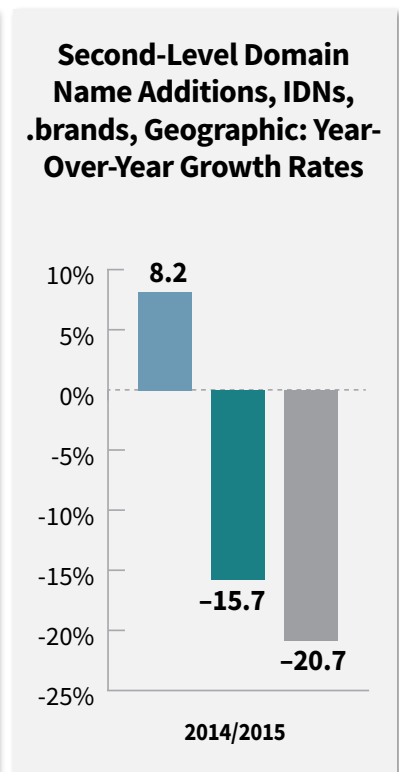
Figure 15

Second-Level Domain Name Deletions in gTLDs (in thousands)

Period	Value
2010 H1	3,507
2010 H2	3,669
2011 H1	4,037
2011 H2	3,971
2012 H1	4,427
2012 H2	4,553
2013 H1	4,569
2013 H2	3,883
2014 H1	11,794
2014 H2	17,923
2015 H1	18,579
2015 H2	18,899

Figure 16

Second-Level Domain Name Deletions in gTLDs: Year-Over-Year Growth Rates (2010-2015)

Period	Growth Rate
2010/2011	11.6
2011/2012	12.1
2012/2013	-5.9
2013/2014	251.6
2014/2015	26.1

Figure 16

Percentage of Second-Level Domain Name Deletions in gTLDs: Legacy and New gTLDs

Legacy gTLDs: 2014 H1: 7.1; 2014 H2: 10.4; 2015 H1: 10.5; 2015 H2: 9.8

New gTLDs – All Categories: 2014 H1: 0.4; 2014 H2: 1.1; 2015 H1: 3.3; 2015 H2: 9.9

Total: 2014 H1: 7.1; 2014 H2: 10.2; 2015 H1: 10.2; 2015 H2: 9.8

Figure 17
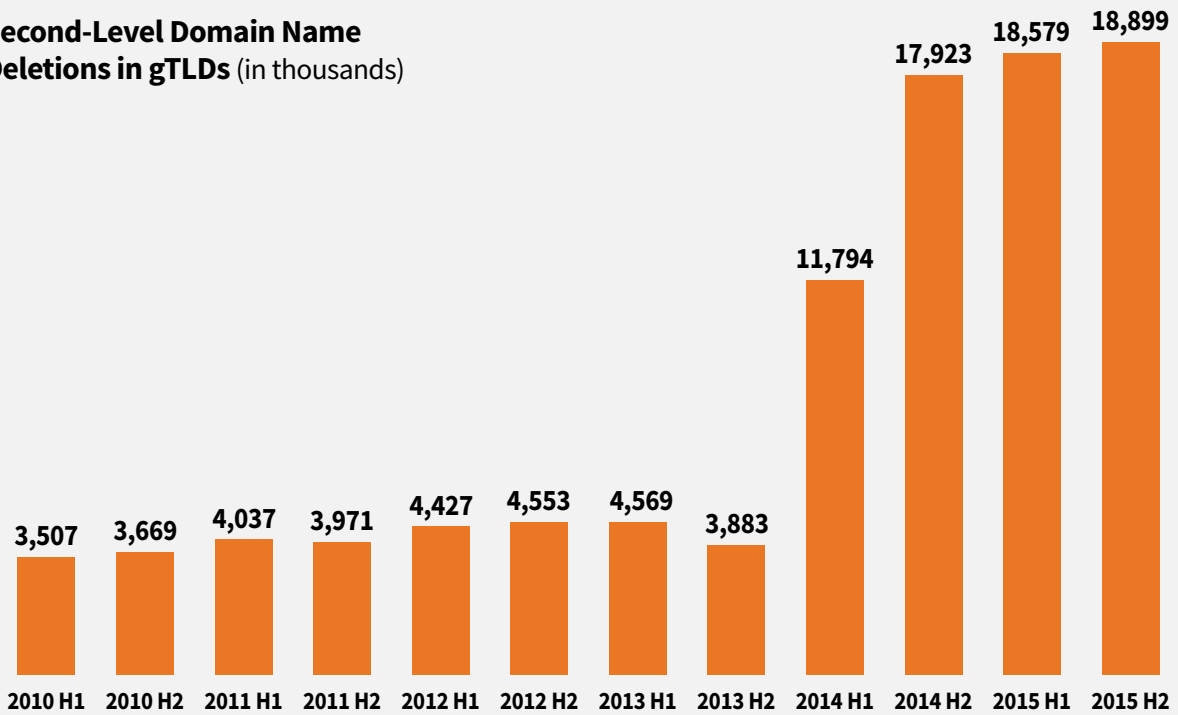
Legend: Legacy gTLDs | New gTLDs – All Categories | Total

Percentage of Second-Level Domain Name Deletions in gTLDs: IDNs, .brands, Geographic

IDNs: 2014 H1: 0.2; 2014 H2: 2.6; 2015 H1: 0.5; 2015 H2: 2.9

.brands: 2014 H1: 65.2**; 2014 H2: 1.8; 2015 H1: 14.5; 2015 H2: 4.1

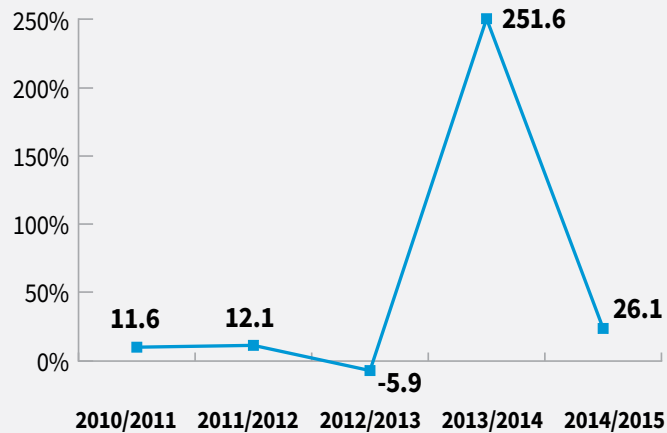**Geographic:** 2014 H1: 25.6; 2014 H2: 6.2; 2015 H1: 9.3; 2015 H2: 21.2

Figure 18

Legend: IDNs | .brands | Geographic
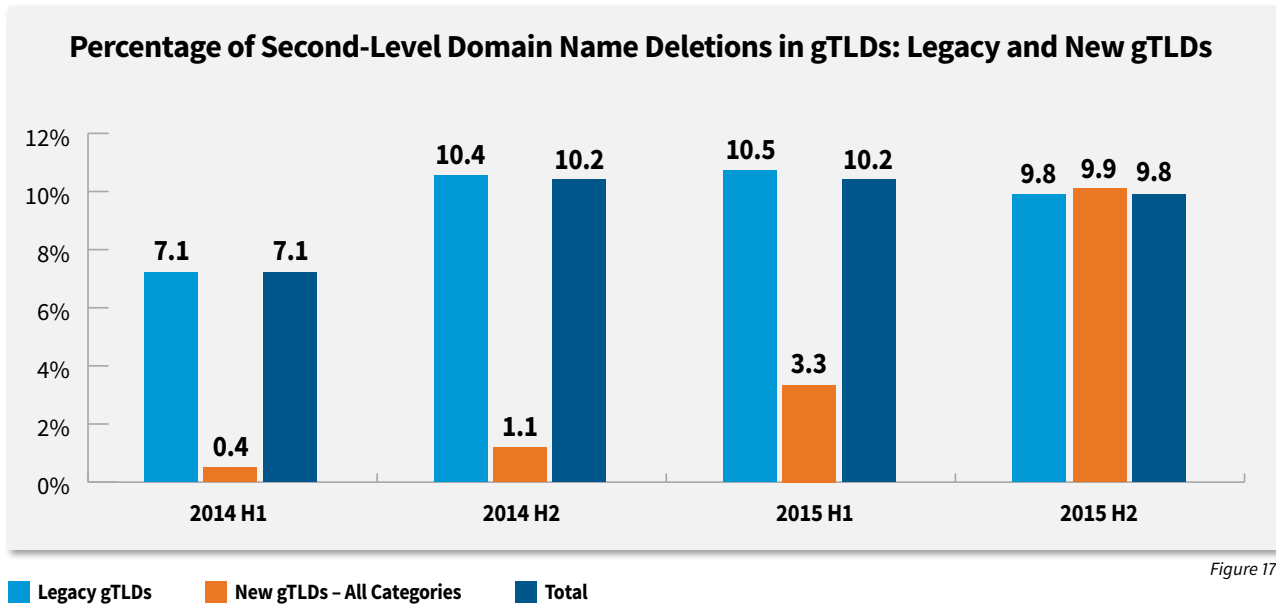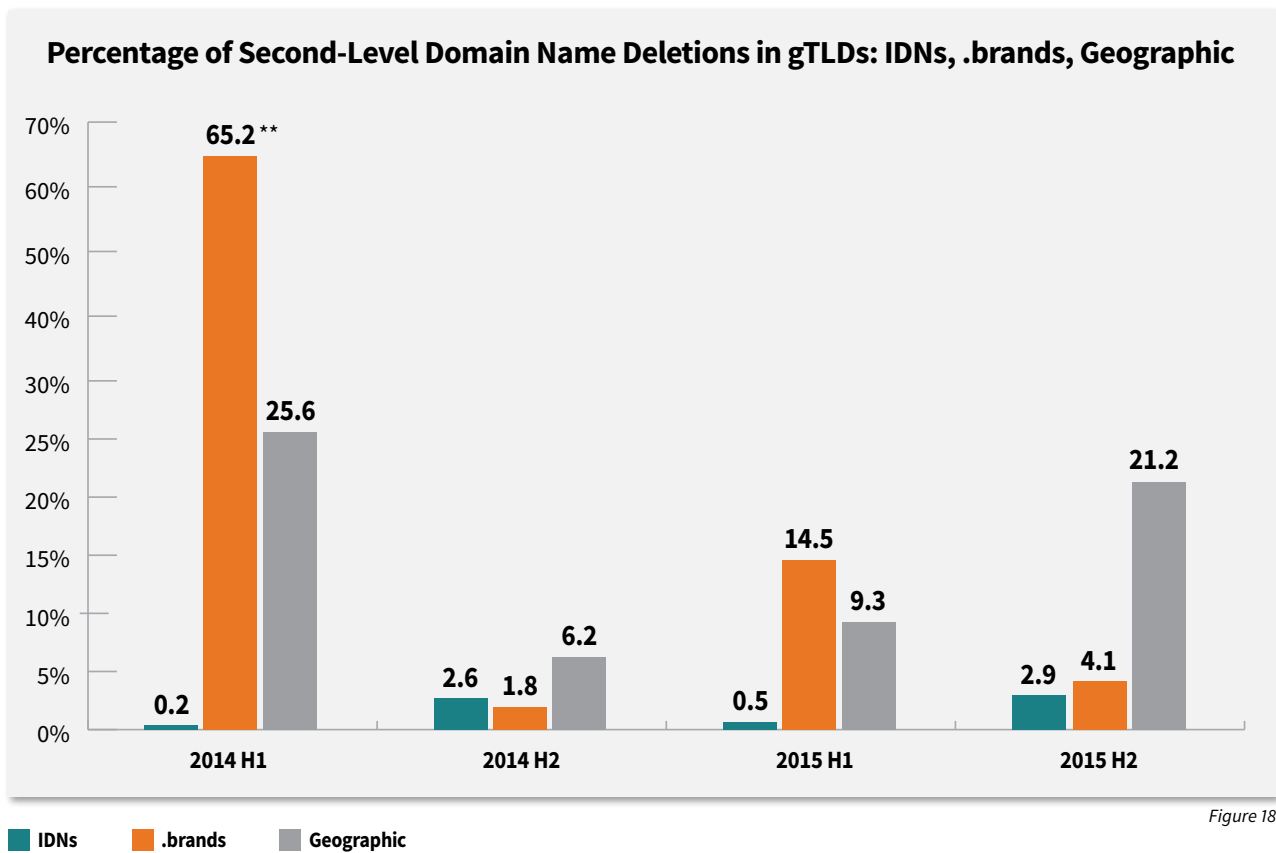
** The percentage of deletions for second-level domains in .brands in 2014 H1 was unusually high due to the small sample size and an unusually large number of monthly deletions (more deletions than total names under management) for two .brands during the reporting period. Excluding those two monthly spikes, the average percentage of second-level deletions in .brands during 2014 H1 was 21.0%.

Marketplace Stability

gTLD Registrars – Newly Accredited

This metric tracks the total number of distinct gTLD registrars that obtained a new ICANN accreditation during the reporting period. A newly accredited gTLD registrar is counted as distinct if it is not affiliated with an existing gTLD registrar family.
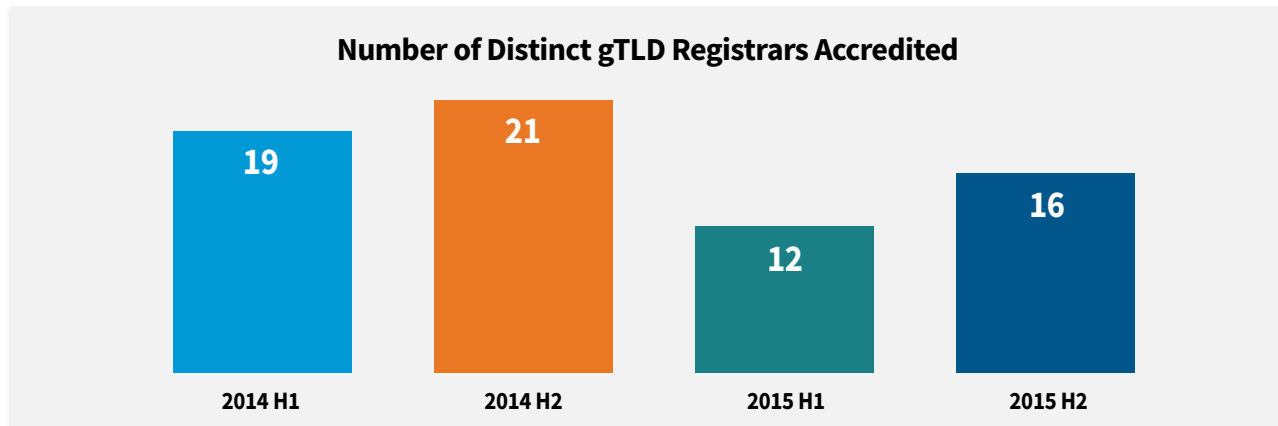

Figure 19

gTLD Registrars – Deaccredited (Voluntary and Involuntary)

This metric tracks the total number of ICANN-accredited gTLD registrars that were deaccredited during the reporting period. Deaccreditation includes gTLD registrars that are terminated due to ICANN compliance violations and gTLD registrars that voluntarily terminated their accreditation agreements with ICANN for any reason. The subset of gTLD registrars terminated due to ICANN compliance violations is also tracked in a separate metric in the "Trust" section, on page 11.

Figure 20
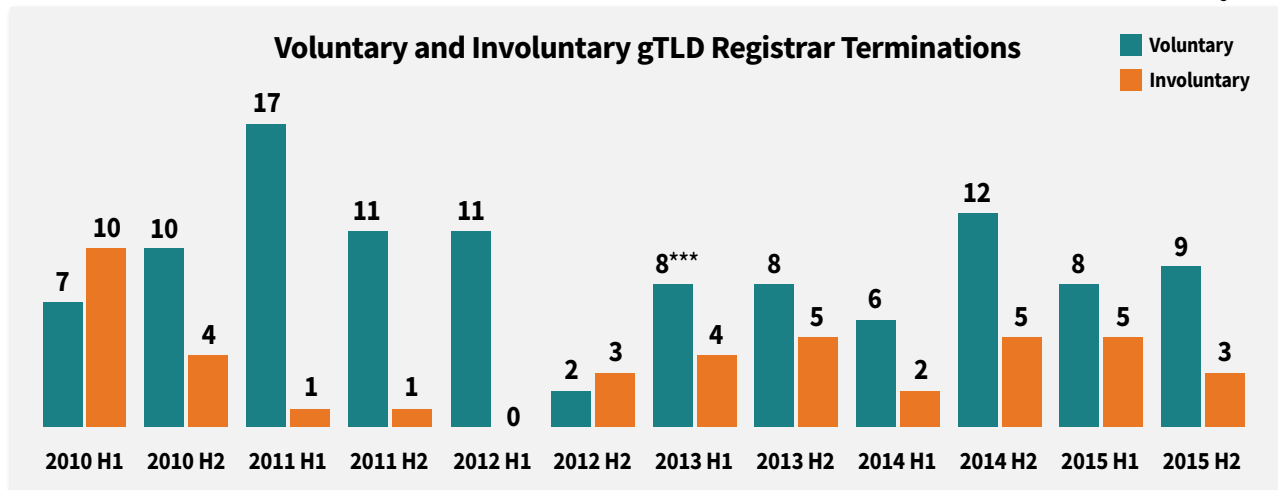
*** The total number of registrars that elected to voluntarily terminate a Registrar Accreditation Agreement with ICANN was unusually high for 2013 H1 due to a large group of registrars (72) from the same registrar family that elected to terminate voluntarily. The total number of deaccreditations was 83, 79 of which were voluntary. Of the deaccreditations, 72 were voluntary deaccreditations from the same registrar family. This number is being reported as the total number of distinct registrars deaccredited during 2013 H1 to normalize for this spike.
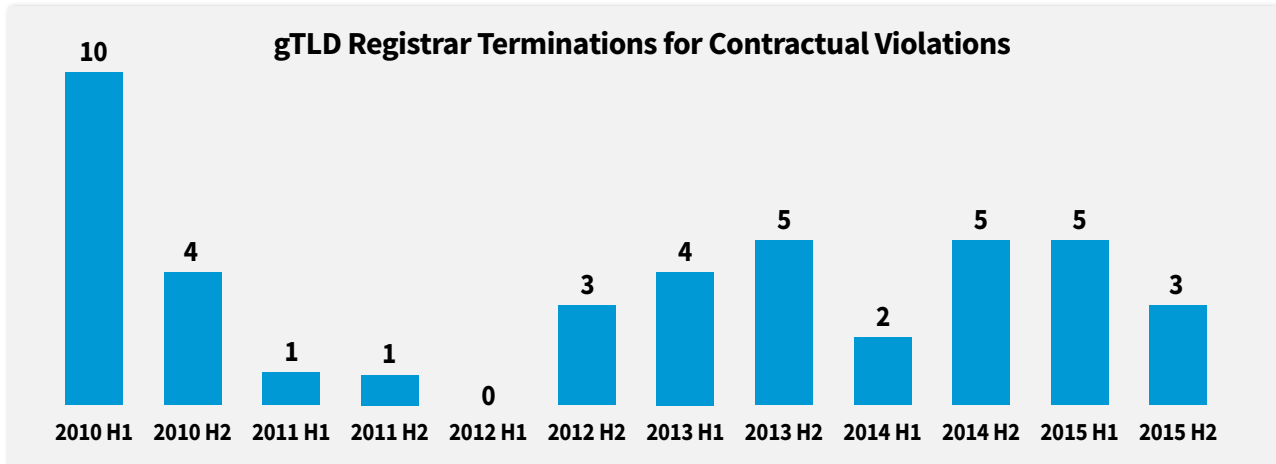
Note: ICANN would normally publish a comparable metric for gTLD registry operators, but during the beta reporting periods, no gTLD registry operator terminated a registry agreement with ICANN. If this situation changes in the future, ICANN will consider publishing the same metric for gTLD registry operators.

Trust

gTLD Registrars – Involuntary Terminations

This metric tracks the number of ICANN-accredited gTLD registrars whose accreditation agreements were terminated by ICANN during the reporting period due to compliance violations.
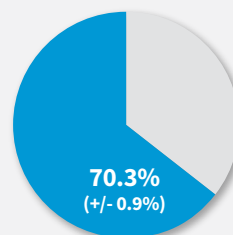
Figure 21

gTLD Registrar Terminations for Contractual Violations

2010 H1	2010 H2	2011 H1	2011 H2	2012 H1	2012 H2	2013 H1	2013 H2	2014 H1	2014 H2	2015 H1	2015 H2
10	4	1	1	0	3	4	5	2	5	5	3

Note: ICANN would normally publish a comparable metric for gTLD registry operators, but during the beta reporting periods, no gTLD registry operator terminated a registry agreement with ICANN. If this situation changes in the future, ICANN will consider publishing the same metric for gTLD registry operators.
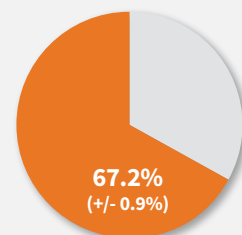
Accuracy of WHOIS Records

This metric tracks the accuracy of WHOIS records, as detected by the WHOIS Accuracy Reporting System.**** For more information, see **whois.icann.org/en/whoisars**.

Syntax Accuracy

WHOIS ARS detects whether the contact information provided in a WHOIS record (email address, postal address and telephone number) is formatted correctly based on the contractual requirements of the Registrar Accreditation Agreement. *Examples: Is there an "@" symbol in the email address? Is there a country code in the telephone number?*

70.3%
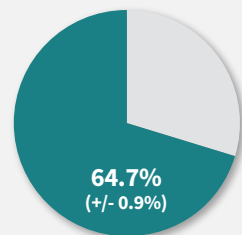**(+/- 0.9%)**
2015 H1

67.2%
(+/- 0.9%)
2015 H2

Figure 22

Operational Accuracy

WHOIS ARS detects whether the contact information provided in a WHOIS record (email address, postal address and telephone number) is operational. *Examples: Does the email go through? Does the phone ring? Will the postal mail be delivered?*

64.7%
(+/- 0.9%)
2015 H2

Figure 23

**** These data are presented at a 95 percent confidence interval with an estimated percentage plus or minus approximately two standard errors.

Number of UDRP and URS Decisions Against gTLD Registrants

These metrics track the total number of Uniform Domain Name Dispute Resolution Policy (UDRP) and Uniform Rapid Suspension (URS) decisions issued against gTLD registrants due to trademark infringement, and that total as a percentage of the total number of UDRP and URS complaints filed.

These metrics are reported on an annual basis. The data for these metrics was collected as part of ICANN's Competition, Consumer Trust and Consumer Choice metrics reporting project. For more information, see: **www.icann.org/resources/reviews/cct/metrics**.
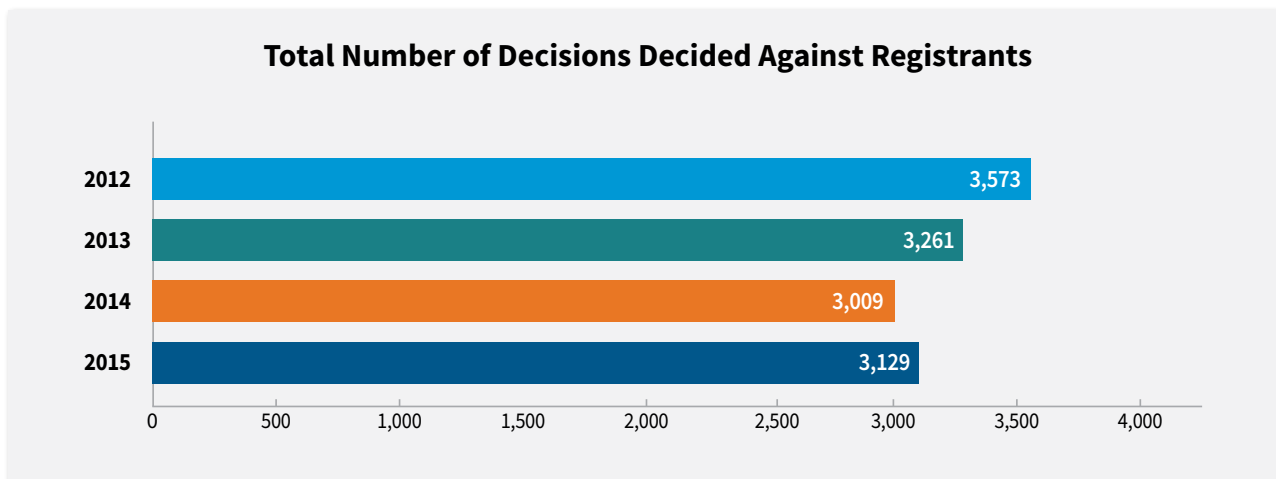
Total Number of Decisions Decided Against Registrants

Year	Value
2012	3,573
2013	3,261
2014	3,009
2015	3,129

Figure 24

Note: Annual totals for 2012 and 2013 include only UDRP decisions decided against registrants. Totals for 2014 and 2015 include both UDRP and URS decisions decided against registrants.
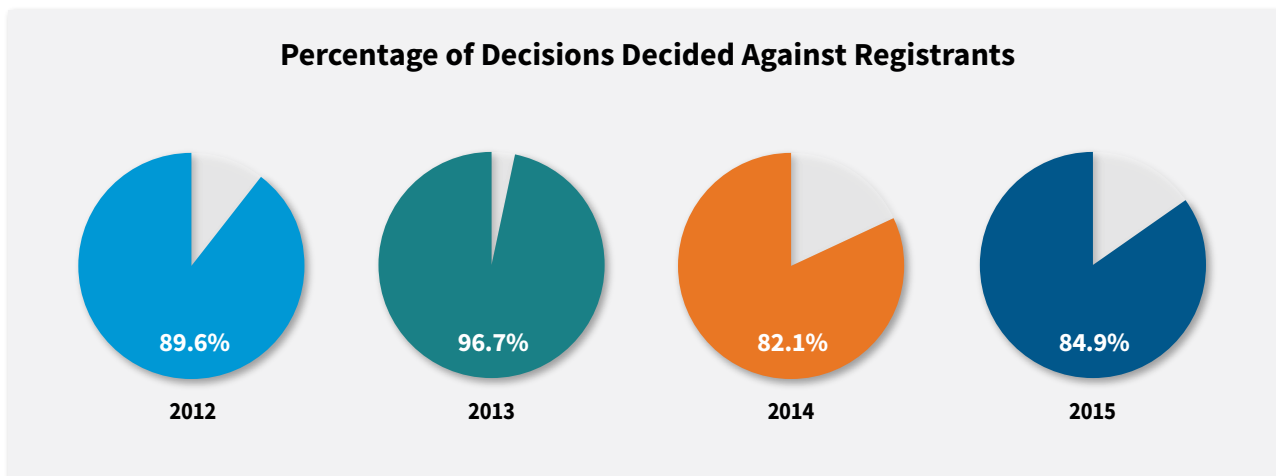
Percentage of Decisions Decided Against Registrants

2012	2013	2014	2015
89.6%	96.7%	82.1%	84.9%

Figure 25

Glossary

Additions. The sum of reported second-level domain names added in gTLDs during the relevant reporting period.

Country code top-level domain (ccTLD). Two-letter top-level domain that corresponds to a country or dependent territory.

Deletions. The sum of reported second-level domain name deletions (outside the add-grace period) in gTLDs during the relevant reporting period.

Generic top-level domain (gTLD). Top-level domain not corresponding to a country code.

> **Legacy gTLD.** Known list of 18 gTLDs: .aero, .asia, .biz, .cat, .com, .coop, .info, .jobs, .mobi, .museum, .name, .net, .org, .post, .pro, .tel, .travel, .xxx.
>
> **Internationalized Domain Names (IDNs).** Internationalized gTLDs. Reported second-level IDN registration numbers do not consider second-level registrations in non-IDN gTLDs or ccTLDs.
>
> **New gTLD.** All non-legacy gTLDs submitting monthly transaction reports to ICANN.
>
> **.brand gTLD.** New gTLDs that have been granted a request to adopt "Specification 13" of the ICANN registry agreement.
>
> **Geographic gTLD.** New gTLDs qualifying for ICANN classification as "geographic."

gTLD registrant. Person or entity holding the rights to a gTLD for a specified period of time.

gTLD registrar. ICANN-accredited company that registers gTLDs.

gTLD registry. Master database of all domain names registered in each gTLD.

gTLD registry operator. Entity that has entered into a Registry Agreement with ICANN. Registry operators set up and maintain the registry for a gTLD.

Jurisdiction. Country or dependent territories, as defined in the ISO 3166-1 standard, published by the International Organization for Standardization.

Service provider. Generic reference to a gTLD registry operator, gTLD registrar or reseller.

Top-level domain. The last segment of a domain name – the portion after the final dot (e.g., .com, .org, .fr).

Uniform Domain Name Dispute Resolution Policy (UDRP). Policy to resolve trademark-based disputes over domain name registrations.

Uniform Rapid Suspension (URS). Complements the UDRP, allowing faster resolution for clear-cut cases of infringement.

WHOIS. Publicly available directory with information about registered domains. Includes contact information for the gTLD registrant and gTLD registrar.

WHOIS Accuracy Reporting System (ARS). System developed by ICANN to identify and report on the accuracy of the WHOIS contact data.

gTLD Marketplace Health Index: Additional Topics for Community Discussion

Many additional metrics topics have been suggested by members of the community as areas ICANN should consider tracking via the gTLD Marketplace Health Index. The following is a non-exhaustive list of additional topics that could be explored in subsequent versions of the gTLD Marketplace Health Index.

ROBUST COMPETITION

- Percentage of second-level domain name registrations in gTLDs completed by resellers

- Number/percentage of resellers broken down by ICANN region and/or legal jurisdiction

- Concentration index for gTLD registry operators and gTLD registrars

- Geographic distribution of gTLD registrants

- Percentage of gTLD registry operators that also run a gTLD registrar

- Renewal rates of second-level domain names in gTLDs

- Survey data on service provider (gTLD registrar, gTLD registry operator, reseller) languages, service models and locations beyond primary offices

- Survey data on perceived marketplace fairness

- Percentage of gTLD registrars offering registrations in IDN gTLDs

- Average number of gTLD registrars offering a gTLD (average across gTLDs and broken down by category)

- Metrics related to pricing and the effect on registration and renewals; gTLD registry operator and gTLD registrar market share; addition of ccTLD data

MARKETPLACE STABILITY

- Number of turnovers in gTLD registry operators

- Availability of gTLD registrar services:
  - gTLD registrar services are reachable and responsive (SLAs)
  - Uptime of gTLD registrar and reseller websites
  - Uptime of gTLD registrar WHOIS service
  - Registrar WHOIS rate limiting

- Uptime of gTLD registry operator (core registry services, per SLAs)

- Price predictability (incidence of reports of unpredictable prices)

- Survey data (from gTLD registrants, Intellectual Property holders, law enforcement and others) regarding levels of service from gTLD registry operators, gTLD registrars and resellers

TRUST

- Number of complaints to ICANN regarding malicious activity

- Number of gTLD registrar security breaches reported to ICANN

- Number of complaints reported to ICANN regarding misleading information from gTLD registrars and resellers

- Use of DNSSEC for second-level gTLDs

- Number of compliance issues with gTLD registry services detected by ICANN SLA monitoring system

- Number of reported cases of phishing

- Incidence of cybercrime

- Incidence of abuse:

  – Number of abuse complaints against gTLD registrars involving malicious or abusive registrations

  – Number of unique second-level domain names in gTLDs that had abuse complaints filed against them

  – Number of second-level domain names in gTLDs suspended for abuse

- Perception of risk (survey-related data)

- Metrics related to second-level gTLD domain names that utilize privacy or proxy registration services

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