GoDaddy Registry

.brands Industry Report

Everything you need to know about .brands

SEPTEMBER 2020

What is a .brand?



A .brand is a top-level domain (TLD) like .com or .co, but with your brand name to the right of the dot. It's your own custom-branded digital ecosystem, where you have total control over the entire namespace.

Over 500 of the world's largest brands now have their own piece of internet real estate. It's time to end the search, and start connecting.



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Foreword



.brands Industry Report

Welcome to the .brands Industry Report for mid-2020, the first of our publications as GoDaddy Registry. After two proud decades as Neustar Registry, our team is excited to be joining the GoDaddy family of companies. Rest assured, as GoDaddy Registry we will continue to support the .brands industry and provide you with all the latest news and insights as we have in the past. We will also continue to "walk the talk," as our business will live on the shiny, new .godaddy brand TLD.

You can find our new website at <u>www.registry.godaddy</u>, which we discuss on Page 22 of this report. The launch of .godaddy is exciting for all of us, and just as we did with .neustar, we will document every step of the way and share the journey with you.

In this report, we highlight one of the largest media organizations in the world, The Sky Group. Sky fully understand the complexities of running a geographically dispersed and multidimensional business as much as anyone. On page 10 Tony Kirsch speaks exclusively with Dawn Shackleton -Head of Online Brand Protection at Sky on about what it means to manage digital IP in the modern world, and how their use of .sky is helping them overcome a range of challenges. This is a must read for IP managers and TLD operators and helps to identify strategies that help stimulate usage of your .brand TLD.

The 'By the Numbers' section that starts on Page 06 contains some of the most impressive statistics we've seen in our history of preparing this report, showing a continued momentum in .brands but a noticeable upswing in usage over the last 12 months. In this publication, we'll also explore industry verticals to see how this impacts .brand usage around the world.

Finally, COVID-19 is such an impactful topic for our world right now and our analysis on what this means for .brands can be found on Page 18. It's great to see a number of household brands using their .brand for this type of controlled and specific messaging and these organizations have really embraced some of the core benefits of owning your own TLD.

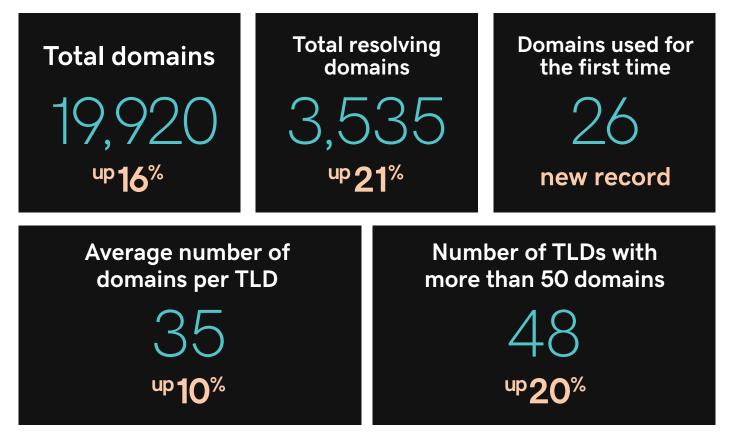
On that note, we hope that you and your families are staying safe as we collectively navigate the so called "new normal". We're all in this together, so please feel free to contact us should you need any assistance or even if you just want to have a friendly chat.

To you and yours: stay safe and healthy, and please enjoy this .brand Industry Report.



Jason Loyer Director, Client Services, GoDaddy Registry

By the numbers



Stats correct as at June 30, 2020. Growth rates indicate change over twelve months from Jul 1, 2019 to Jun 30, 2020

Registered .brand domains



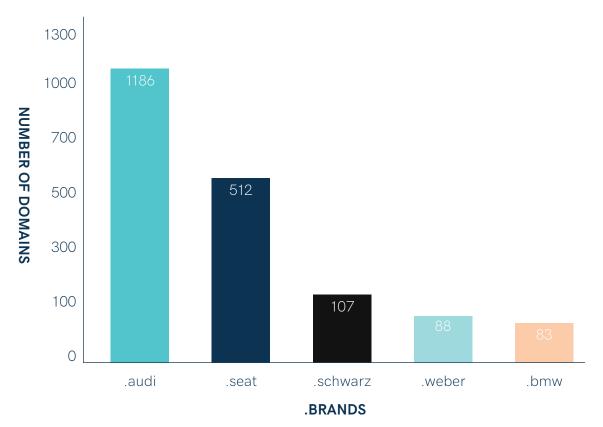
.brands Industry Report

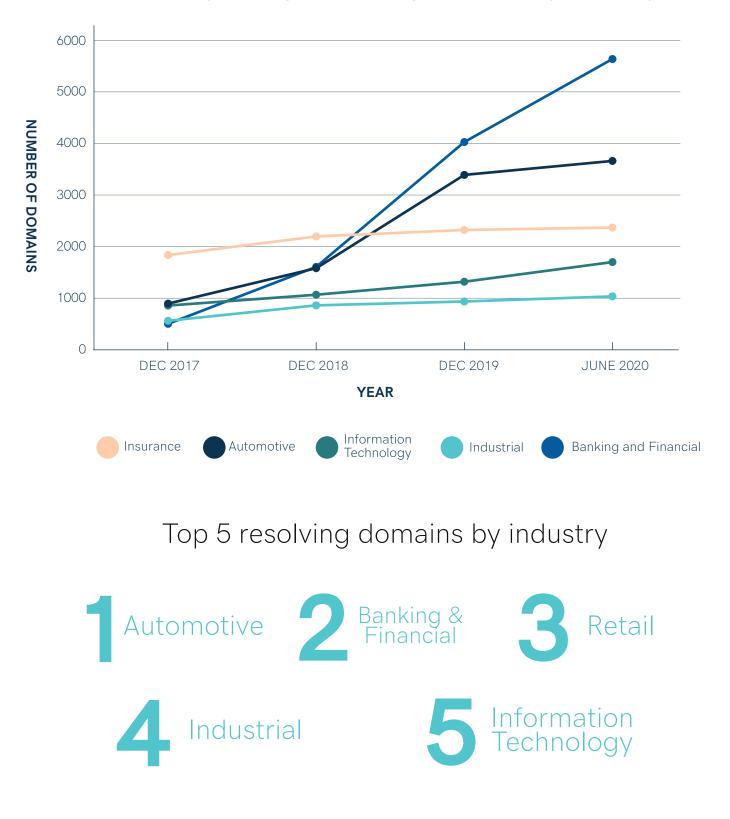
*Data - 1 July 2019 to 30 June 2020

Fastest growing .brand domains



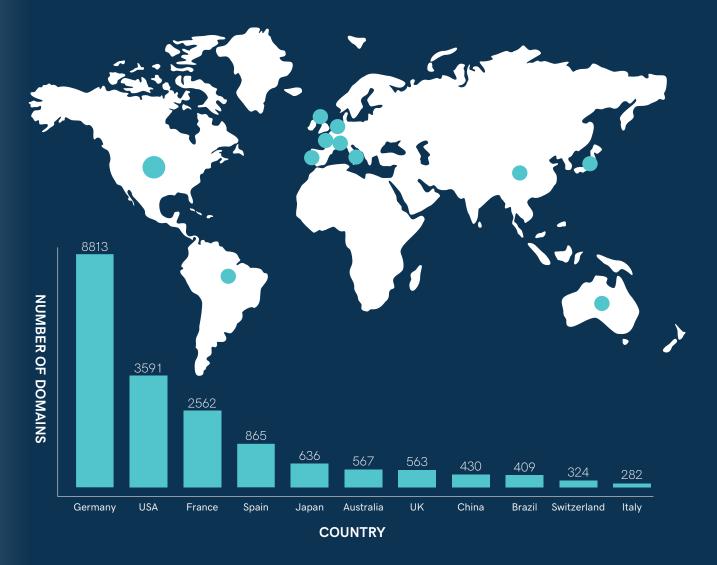
Most resolving .brand domains





Fastest growing .brand registrations by industry

Countries leading the way with .brand domain names



Countries with the fastest growth in .brand domain registrations (%)

Kuwait		165%			34%	Russian Federation
Austria		80%			30%	Australia
India	37%			23%		Israel

FEATURE ARTICLE

How Sky Group is managing their global digital IP



Tony Kirsch Head of Professional Services, GoDaddy Registry



Dawn Shackleton Head of Online Brand Protection, Sky Group Technology



Sky Group is one of the world's most diversified Direct-To-Consumer media organizations and operates across numerous countries and business areas. Since their acquisition of the .sky TLD, Sky Group have consistently experimented with .sky and are one of the foremost advocates of .brand utilization.

In this exclusive interview, GoDaddy Registry's Tony Kirsch talks with Dawn Shackleton – Head of Online Brand Management to discuss all things digital IP, .brand and how .sky is slowly becoming part of this giant organization's future online footprint.

Tony Kirsch: Thanks for taking the time to speak with us Dawn. To start, could you tell us a little about your background and your current role in terms of managing Sky's digital IP?

Dawn Shackleton: Hello Tony, it's absolutely my pleasure. I have worked for Sky in the UK for over 22 years in many guises. Currently I am Head of Online Brand Protection

and my team works out of Sky's Group Technology Office. My team's responsibilities include managing Group Sky internet

"I HAVE WORKED FOR SKY IN THE UK FOR OVER 22 YEARS IN MANY GUISES."

name space (domains and dotSKY registry), provide DNS support for technology and business teams, manage the external PKI providers and facilitate the provision and promotion of online compliance policies and guidance. I am also proud to be an active member and sit on the board of the Brand Registry Group (BRG).

Tony Kirsch: What does the Sky Group digital IP portfolio look like?

Dawn Shackleton: Sky has multiple domain portfolios across the different territories that it operates out of. My team is the central domain management hub for all Sky territories, and we set the domain name strategy and policies for the whole of Sky Group. In the UK sky. com is used for customer facing services. Whereas the ccTLD is used for Rep of Ireland, Germany, Italy, Austria, Spain and Switzerland. The active domains and defensive domains reflect the trademarks, products and services available to customers within each country.

Tony Kirsch: What are the 5 most concerning challenges you're facing today in terms of managing the domain portfolio for Sky?

Dawn Shackleton: TV and film content acquisition and license agreements with major studios and sports organisations around the world and producing home grown content is incredibly expensive. Preventing and shutting down content piracy sites on the public and deep web is the top challenge for Sky. Preventing and educating customers and staff of the latest phishing scams infringing on Sky's brands is a never-ending task that my team work with cyber security to tackle the issues we face. We also work closely with the IP lawyers to close sites, apps and social media accounts that are infringing

on Sky's trademarks via a domain name. Another big challenge is finding dotCOM

"MY TEAM IS THE CENTRAL DOMAIN MANAGEMENT HUB FOR ALL SKY TERRITORIES..."

domains for new products and services, as most skygenericword. com domains have been registered by domain prospectors if not already owned by Sky. To purchase generic two-word domains is expensive and challenging. Lastly having a generic word for a brand makes defending it a rather large brand protection exercise on a global level and across multiple languages and cultures.

Tony Kirsch: What strategies (including .sky, but not specifically related to .sky) have you found useful to implement to overcome these challenges?

Dawn Shackleton: Brand protection in the internet name space makes it necessary to build collaborative and strong working relationships with legal and security teams. At Sky, Nisha Parkash in my team and I are the domain specialists and we treat domains as digital assets,





which they are. Technologists love a strategy and over the last four years we have agreed with the legal, business, technology and product teams the Group Sky Domain Management Strategy. For a large organisation it is essential to have a centralised and cohesive domain management strategy and promote awareness of the policies to all areas of the business. Some of our domain policies include not looking up availability of a domain name outside of my team, avoid the use of hyphens, not registering typo domains (where does it end?), we don't allow the use of other brand trademarks and we even have policies to cover sub domains (3LDs) and DNS domain delegations. We

also utilise a report we receive from one of our domain management suppliers that flags domain registrations containing the words 'sky' and

'now' (NowTV is a no contract OTT box and service). This enables Sky's security teams to watch for any infringing activity on those domains.

"PEOPLE NOW

FOR A DOTSKY

COME TO US ASKING

DOMAIN NAME, SO

THE CONSISTENCY

AND PERSEVERANCE

Tony Kirsch: Are these challenges consistent with what you hear from other brand owners? Or are there differences you see depending on the types of organizations?

Dawn Shackleton: In particular content piracy is the biggest headache for TV and film companies as it is global and in the main associated with organised crime. Phishing scams are a nightmare for all commercial enterprises no matter what size of organisation you are. Your relationship with your customers can easily be tarnished if you don't proactively try and closedown the scams or at least inform your customers to be on the lookout for them. It costs many millions to

> build and market a reputable brand and yet for a few bucks a criminal using a similar domain name (often using a hyphened or typo domain) can destroy a brands reputation.

Tony Kirsch: What have been some of the challenges that you've experienced in terms of building awareness and excitement to use .sky internally?

Dawn Shackleton: At most large companies' people move on or change their roles and Sky is no different. This means that getting long term traction and awareness of dotSKY is a time consuming and often arduous task. It was especially hard during the build up to the Application process and until delegation. It's not easy trying to explain what a TLD is and why it's different to a 2LD domain name. Sky has benefited from me still being around to manage the dotSKY registry. Plus, some of our legal folk that took part in the feasibility study and the Application contract work are still at Sky. Luckily, they remain engaged with the registry and domain management. This has meant that the TLD wasn't forgotten about and mothballed. By including the TLD in all domain requirement discussions around the company we were able to promote dotSKY as an alternative source of domain names. By being consistent with our domain name messages since delegation we have built up a top to bottom awareness of dotSKY. People now come to us asking for a dotSKY domain name, so the consistency and perseverance has paid off. Mind you to begin with we had to be cautious about drumming up too many requests for dotSKY domains because of having a restricted number of domains that we were able to register. After a successful renegotiation of the backend agreement with our provider we now have a substantial increase in the number of domains we can register. A win, win situation for all concerned.



Tony Kirsch: What about any challenges related to being a media organization with multiple divisions, and multiple geographical locations?

Dawn Shackleton: Group Sky is an international organisation and has multiple trademarks in several languages with different trade mark levels registered within many different countries. The challenges for a media organisation are that your brand tends to be more widely known. Especially when you have popular content from Sky Sports (UK. Italian and German soccer, F1 and cricket), Sky News (federation of 'real' global news stories from renowned and award-winning journalists) and our entertainment channels (original productions such as the highly acclaimed and awardwinning Chernobyl). People want your content and sadly they want it to be cheap/free and therefore more willing to try pirate streaming or VOD services that criminals can fire up so easily. To have infringing sites taken down is time consuming and if you must you have to eventually go through UDRP, which is expensive.

Tony Kirsch: What have you found useful in terms of successful education tactics?

Dawn Shackleton: One of my team's responsibilities is to facilitate the provision of online compliance guidance. If relevant to the project being discussed the conversation about domain name requirements can be kicked off. These guidance meetings are a by-product of the Application feasibility study as the constant message I was hearing from participants of the study was; "Is there a central place I can go to for information about domains and other online compliance requirements". My team and I also take any other opportunity that arises to talk to people about dotSKY and our domain management strategy and sometimes we just make the opportunities.

Tony Kirsch: We've seen .sky in use across a range of business activities to date, what are the top 5 cases that you're most proud of and what have they achieved for the business? For example:

- Skygroup.sky corporate https://www.skygroup.sky/
- Productionservices.sky https:// productionservices.sky/
- Analytics.sky a standalone portal for advertisers to access their campaign data https://analytics.sky/Account/ SignIn?ReturnUrl=%2f#/
- At.sky seemingly an internal SSO portal or similar
- @example.contact.sky email services

Dawn Shackleton: I am proud of all the above examples. The main game changer was the migration of the corporate (not consumer) website from sky.com to skygroup.sky and this is where we provide our nic.sky site. There was a slight drop in user traffic at the start of the new site but within 3 months of launching the new site there was a steady increment of traffic and after 6 months the traffic was above the old site. Sky corporate communications team have subsequently decided to only use a dotSKY domain for corporate



sites and messaging. I think the funkiest site using a dotSKY domain is the Sky Production Services one. It is a great showcase of the Sky UK production facilities and its talented resources that are available for hire. Another huge benefit for our Enterprise Tech team is @example. contact.sky email proxies. It allows Sky to farm out bulk email marketing and promotional messages to customers via authorised 3rd party agencies, safe in the knowledge that customers will see an email address that screams that it is from Sky. Also proud of the dotSKY domains that will never be seen by the general public. Several of our enterprise technology teams are using dotSKY domains for large infrastructure platforms including a data centre. Tony Kirsch: You've employed the use of a number of redirects with the .sky TLD. Where do you normally use them externally facing to customers?

Dawn Shackleton: The dotSKY redirects point to the main customer sites for the UK, sky.com and a few point to the main customer sites for Germany and Italy. The most popular of the redirected domains in terms of organic traffic is news.sky. The SEO team are more than happy to obtain this low-level traffic. Any traffic is good traffic.

Tony Kirsch: Have you experienced any challenges in launching .sky projects?

Dawn Shackleton: In the early days

it was a problem to get traction but not now. There was concern that migrating from say sky.com would lose traffic but the new corporate website has shown that with careful planning and collaborative working between the business and

technology teams it is possible to quickly meet previous traffic levels and improve on them. People are coming to us asking if they can have a dotSKY domain for their project. Provided the use of the dotSKY domain falls within our domain management strategy then most of the time we can fulfill their request.

Tony Kirsch: What are the areas you see .sky being most useful for moving forward?

Dawn Shackleton: Looking forward I see dotSKY starting to be used for more customer focused projects. This is because it is becoming more difficult and expensive to obtain .com and .ccTLD domains starting with the word 'sky'. I am always thinking about what the future looks like for dotSKY and love doing the blue sky thinking. For example, Sky will be building a new studio production complex that recently receive local council planning permission in Elstree, UK. I see a big opportunity to use



dotSKY domains when content production starts at the studios.

Tony Kirsch: Have you explored HSTS or other technologies such as DMARC for email using .sky?

Dawn Shackleton: We already use DMARC and DKIM for email services. It is embedded as policy to do so. I personally feel many organisations should change their view of domains and see them as a piece of technology not just as an extension of trademarks. After all, without the domain name you have no internet presence. A domain name is a digital reflection of your trade mark and brand. Equally I don't think it is fair to expect lawyers or marketeers to make the right technical choices for a domain name and certainly not about the record requirements for zone files and name servers. The look of fear you see in their eyes when you start talking about what A records and CNAME delegations are required. Well you know they are seconds away from fleeing from you.

Tony Kirsch: You've been a longtime public supporter of .sky and .brands in general Dawn, what excites you about .brands and their role in the digital ecosystem?

Dawn Shackleton: I love my work at Sky and enormously proud of the big strides forward that have been made with dotSKY in the last 2/3years. I still get enormously excited about requests for domain names in the registry. The flip side in many respects is my frustration that I don't think the domain industry, or the ICANN communities get brand TLDs in their purest form. Brand registries operate in a totally different dimension to the domain industry. Unfortunately, you still see the success of .brands being measured by the number of domains registered. This is a false take on the success of a brand registry. Brands are not in the business of profiting from domain name registrations and certainly they are not in competition with other nTLD registries. You know when you read about a brand dropping its TLD that there are some stalwarts in the

in all industries are being bought and sold, rebranding or go out of business. Indeed, many brands are perfectly happy to not actively use their TLD, as in their eyes they have the best defense of their brand in the internet name space and really do not care what the domain industry thinks. I get this point of view, but it's much more fun to use the brand TLD, even for basic redirects. I think ICANN made a bold and innovative decision to allow brands to own a TLD. It is important to acknowledge that rebranding and migrating huge commercial consumer platforms to another domain is massively expensive and requires extensive and careful planning on many business fronts. For example, Sky's corporate site migration to skygroup.sky, which is small in comparison to a typical consumer site, took 20 months to complete. It was worth the investment and other brands should follow suit when the time is right for them, their brand, products and customers. As the internet becomes more populated by commercial enterprises large,

industry out there wringing their hands in glee and saying, "I told you so, brand TLDs don't work". Frankly I am surprised that there have been so few brand TLDs that have been discarded to date. Commercial enterprises

"A DOMAIN NAME IS A DIGITAL REFLECTION OF YOUR TRADE MARK AND BRAND." small and in-between, I am sure that other brands and especially those that have only ever been online enterprises, will be participating in the next application round for their TLD.

Provided the price of investing is sensible and right for them.

Tony Kirsch: Have you seen examples from other organizations that you think demonstrate great leadership?

Dawn Shackleton: KPMG shifting their online estate to their TLD is admirable and a great example to all brands of what great usage of a brand TLD looks like. I would highly recommend listening to the Brand Registry Group webinar with Domenic Torani at KPMG that can be found on the BRG website.

Tony Kirsch: What do you see the role of .brands being over the next 5-10 years?

Dawn Shackleton: The internet is now primarily a vast commercial platform and the domain industry should move with the times and realise that it is no longer their sandbox. Commercial and Technology enterprises of all sizes have their brand hook, upon which products, services and reputations dangle. No business can survive successfully without a presence on the internet. TLDs for the big brands will eventually become the must have. Potentially some brands that have decided to drop their TLD may in the future regret doing so. We shall see. Bring on the next gTLD Application round.

Tony Kirsch: Couldn't have said it any better myself, thanks Dawn!

Showcase:Highlights

A selection of the best .brand usage around the world



bank.sbi

India's state bank drops the legacy domain and goes all in on the .brand.



create.hsbc

International leading bank publishing it's own brand hub to the world.



applecard.apple

Apple launches it's credit card with a cool .apple redirect.



service.bentley

Classy domain to get your classy Bentley serviced. Perfect!



kinderraad.shell

Shell's Dutch Kinder Council gets a new website and .brand domain.



honeycode.aws

Amazon launches their new app creation tools on this awesome looking site.

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learn.sap

Global technology leader creates new domain for all of their educational tools.



openlab.cern

CERN shares it's research community hub with the world.



frankfurt.mini

Brilliant website that showcases Mini's Frankfurt dealership.



idtheft.aig

Insurance giant creates a new site to help users understand how to protect their identity.



baseball.fox

Fox Sports now creating memorable domains to help customers find the content they want.



sustainability.clubmed

The holiday organization's commitment to a sustainable future.



techtalent.ipiranga

Brazilian technology firm uses .brand to find the next generation of talent.



labs.sas

A new innovation portal developed by the Swedish Airline.



rise.barclays

The UK bank's online innovation portal for customers and partners.



my.sandvik

Swedish industrial giant creates entire new customer portal on their .brand TLD.



chromeenterprise.google

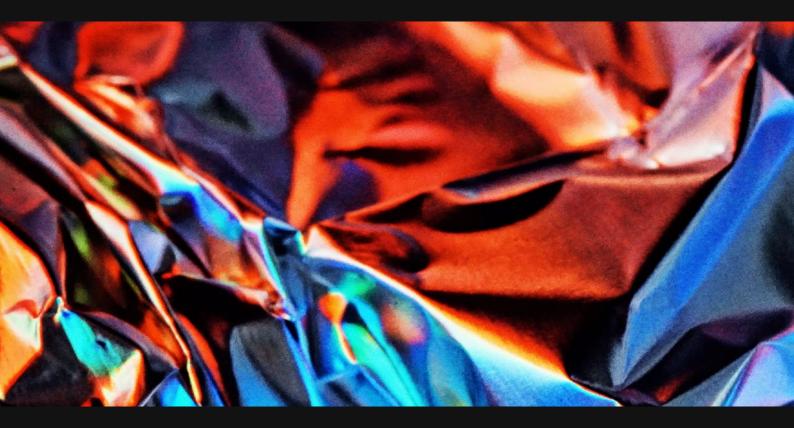
The popular browser launches it's business offering on .google.



diventafornitore.gucci

The Italian luxury good brand goes big launching their new range.





Using your brand in crisis. A COVID-19 analysis

.brands Industry Report





Tony Kirsch Head of Professional Services, GoDaddy Registry We've often talked about how .brand top-level domains create safe namespaces and an opportunity for their owners to establish a trusted home on the web.

And whilst this results in a range of benefits such as eliminating squatting or concerns about expensive domain acquisitions in the aftermarket, the COVID-19 pandemic has also highlighted the benefits of speedy domain registration to support crisis communications.

Crisis communications can occur for a variety of reasons across large organizations, including responding to topical important news, customer feedback or product/service related issues.

The COVID-19 crisis is one of the most devastating situations that has faced the global economy in modern times, and many large organizations have found the need to produce digital content to support their business needs and provide information to their customers and clients.

The use of a .brand to achieve this can be highly advantageous for a number of reasons – let's take a look at just a few.



1. Domain squatters buy all the names **immediately**

With relatively low domain pricing available on most popular extensions these days and plenty of options to choose from, buying

multiple variants of domains that relate to a topic is a low cost investment. As you'd expect, the vast majority of these are in .com but there are also plenty of domains that have been registered in ccTLDs and other gTLD extensions - both traditional and new TLDs.

How many you might ask?

According to some industry sources, there are almost 100,000 names that have been registered in 2020 that relate to the COVID-19 pandemic. As you'd imagine, these often have the keywords 'corona', 'virus' and 'covid' within them. To be clear, many of these names will be used for legitimate purposes so we're not suggesting that this is only the realm of bad actors on the web. However, if you're even a few minutes slow on grabbing that campaign domain that you want, you can rest assured that the domain name you want will be taken and you're either searching for a domain that's close to what you wanted or entering the aftermarket to buy at a higher price if it's even available.

2. Many names are often used for scams which harm consumer trust

As reported recently in a Trend Micro article¹, the use of COVID-19 or similar domain names have been used many times already by malicious

actors. Whilst it can be hard to picture why this would occur at such a scale, imagine for a moment the number of people seeking to profit from this virus in an illegitimate way - including those with fake information, selling untested vaccinations and seeking donations for non-existent organizations to name just a few.

Consumers are becoming increasingly wary of these types of domains and it's reasonable to expect that trust levels from many within the online community with these types of websites is not high. Nonetheless, education on online behavior is not consistent across the world and plenty of opportunity for illegal and immoral activity that harms the consumer exists, especially in times of panic and increased research.

coronavirus.google

Google are no stranger to using their .brand TLD for important social purposes and coronavirus. google is no exception. This .brand redirects through to the Google COVID-19 information hub - almost Wikipedia like in terms of its unbiased and succinct information presentation on causes, symptoms and prevention tips.

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3. These scams Further information from the Trend Micro article¹ claims that COVID-19 domains are regularly

being used to inject malware into local machines and causing permanent security breaches. We're talking here about attacking internal networks, rendering local machines inaccessible and potentially hacking sensitive data from businesses and individuals.

Sure...this can happen at any time and isn't specifically related to COVID-19. However, history is a good indicator of future activity when it comes to understanding how bad actors get the attention of the vulnerable using topical and seemingly legitimate domain names.

coronavirus.fox

The domain coronavirusnow.fox and coronavirus.fox have both been created to forward through to Fox News' statistical and news portal which is housed at coronavirusnow.com. This site is being promoted heavily through the media cycles and would be experiencing substantial volumes of traffic as a result of the large amount of public interest.

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coronavirus.abbott

Few organizations have such a crucial role to play in beating the Corona Virus due to their extensive range of testing facilities. Abbott have used this domain as a redirect through to their abbott.com site but the content itself is brilliant at outlining information about the disease and what Abbott is doing to assist with testing and research.



¹Trend Micro article 'Developing Story: COVID-19 Used in Malicious Campaigns' published March 06, 2020 (https://www.trendmicro.com/vinfo/au/security/news/cybercrime-anddigital-threats/coronavirus-used-in-spam-malware-file-names-and-malicious-domains)"

4. Crisis creates new levels of exposure for brand owners

Many of our large clients have reported a need to register substantial volumes of domains to protect their brand in relation to

COVID-19, causing additional expense and headache. Organizations that are involved in finance, technology and pharmaceutical are particularly impacted as they need to suddenly ensure that squatters do not register names that contain both their brand and anything related to COVID-19.

Even organizations such as Facebook which are under increasing regulatory pressure to ensure legitimate content publishing were forced to register over 500 COVID-19 related names such as facebookcoronavirus-info.com according to Domain Name Wire. Sound ridiculous? Perhaps so. But as any brand manager will tell you having experienced this for years, preventing rather than legally challenging is always the preferable option.

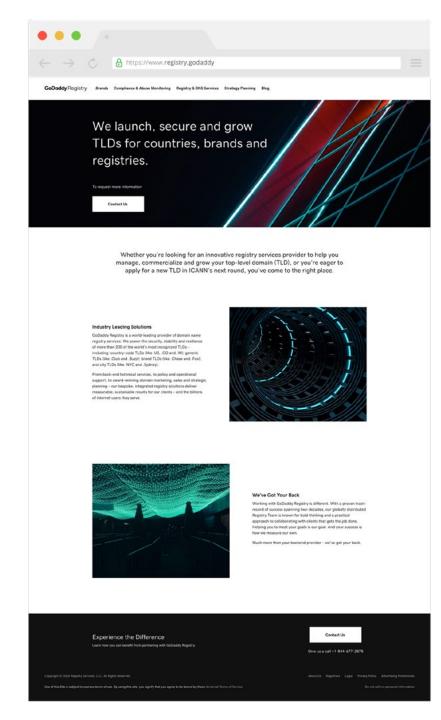
coronavirus.dhl

We all know that increased time at home and social distancing equates to a higher than usual reliance on logistics and delivery and German owned, global distribution organization DHL is no exception. With millions of customers and employees all over the world, this information portal outlines DHL's commitment to its stakeholders throughout this crisis.



SPOTLIGHT SERIES

registry.godaddy A .brand new home for GoDaddy's Registry business



.brands Industry Report

The .brands Spotlight Series takes a deep-dive into interesting facets of the .brands space, looking at Stats Hub data to find insights about how .brands are being used across different industries, regions and organizations. This Spotlight piece focuses in on GoDaddy's first use of its .brand TLD following the acquisition of Neustar's Registry Services business. As we have seen with many other .brand activations in the past, one highly effective strategy for using a .brand can be to enable new parts of a business, product or specific messaging to be created without interfering with the predominant website and digital brand identity. Organizations such as Google have followed this methodology with key product/communication launches existing on .google (i.e. registry.google), without impact to the historical google.com brand which remains unchanged for the core business.

The launch of registry.godaddy represents the utilization of a very similar strategy for GoDaddy Inc. In this case, the popular godaddy.com website and brand identity will remain unchanged for GoDaddy's millions of domain, email and website customers around the world. At the same time, the registry.godaddy website has been created specifically for our top-level domain registry business that supports over 200 of the world's most recognizable TLDs including .co, .biz, .nyc and over 130 .brands.

It is indeed notable that this is the first domain registered under .godaddy despite the TLD being delegated to the root zone of the internet in 2016. Like many organizations, finding the right time to launch a .brand can take time, in particular for businesses with a heavy online brand recognition that is reliant on their .com or similar identity. GoDaddy's acquisition of Neustar's registry business, and the launch of the new GoDaddy Registry brand provided a perfect opportunity for .godaddy to be utilized and it's highly likely that more such opportunities will come along once the simplicity of using the .brand becomes apparent to internal and external stakeholders and the .brand industry continues to become more mainstream.

An initial analysis reveals a similar, yet distinct branding strategy for GoDaddy Registry compared to the core GoDaddy brand and the registry.godaddy domain is a standalone URL that doesn't redirect back to the godaddy.com website. The site is simple and clean, initially introducing the new GoDaddy Registry business and providing access to the key business streams including compliance, registry services, advisory services and a range of information specific to the .brand industry.

Is this the start of further .godaddy usage in the future? Only time will tell. For now, this is a great example of a .brand TLD helping an organization to operate two distinctly separate businesses with separate online brand identities.

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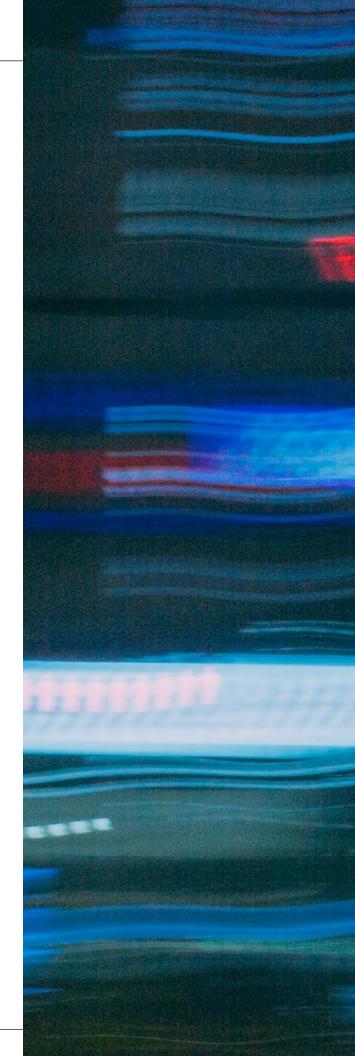
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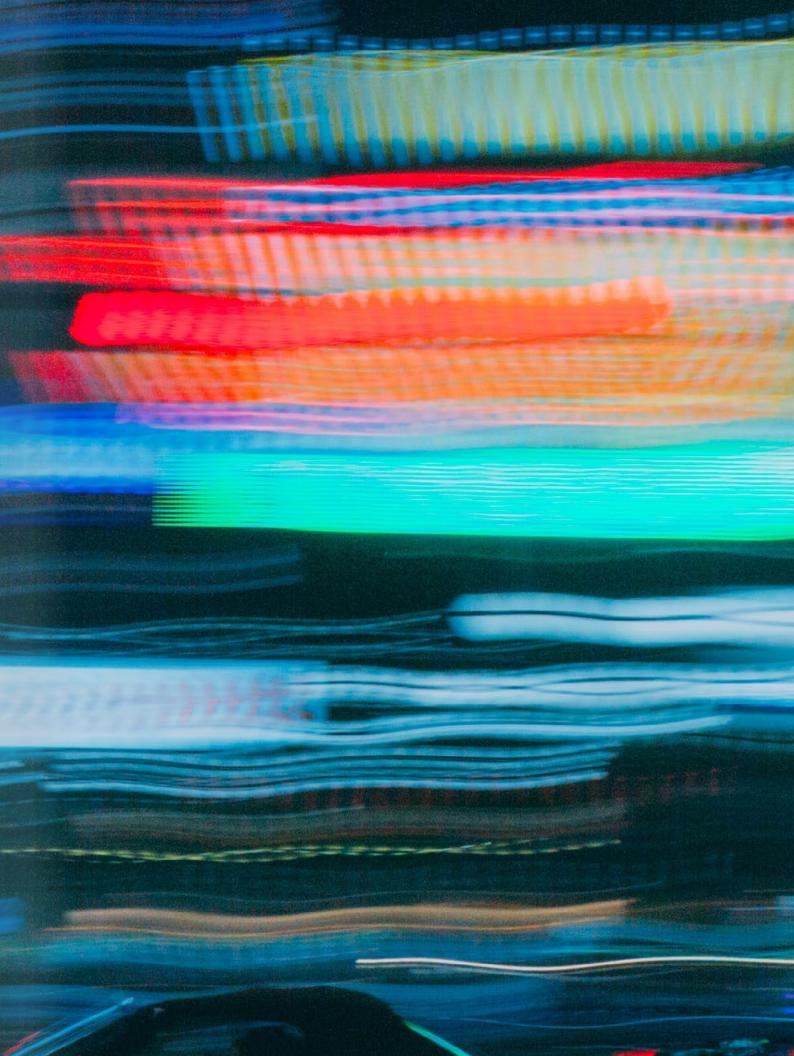
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