

nic//report

6th Edition // MARKET ANALYSIS



Domain Registry
by nic.at

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Dear reader,

Up-to-date figures and current trends play a vital role in the development of our industry and our services. What do people click on first when searching for companies, artists or private individuals? All things considered, what criteria matter most when choosing a suitable registrar? And how well known is .at in Austria? This edition of the **nic//report** gives the answers to these questions and many more besides.

In May, we carried out an extensive survey in partnership with respected online market research institute marketagent. Market analysis is essential, especially when it is time to look ahead to the future – like now, as we come to the end of the year – and start thinking about new strategies and products. So we are delighted to bring you the results of the survey.

We wish you an enjoyable read!

Richard Wein and Robert Schischka
(Managing Directors of **nic.at**)



.at: LIKEABLE AND DEPENDABLE

1,000 internet users from Austria took part in our survey of web use and domains, covering topics right across the board. You can find a summary of the key findings below.

Internet use increasing constantly and mobile access on the rise

The figures speak for themselves: almost 90% of respondents surf the internet daily, primarily using mobile devices. Only 1.3% can picture doing without the web altogether. The continued growth in social media use also comes as no surprise: the most popular sites on the web are Facebook (visited by 32.8% of respondents), WhatsApp (23.6%), YouTube (16.3%), Instagram (15.8%) and Amazon (14.5%). The survey participants said they spent 40% of their time online via apps and the remaining 60% via browsers.

Own website important to make trustworthy impression

The responses on domains and websites showed that an online presence is becoming more vital. 70% of the survey participants thought that companies and organisations should have their own domain. The same goes for political parties (52.1%), freelancers (42.2%) and artists and musicians (35.9%). However, only 7.1% rated this as a very important consideration for private individuals. Almost half of the respondents felt that organisations and businesses without their own site come across as less trustworthy. 45% thought the same about firms which do not have their own domain as their email address and use an address from a free mail provider instead.

.at – first choice for domains in Austria

When it comes to domain endings, **.at** is well ahead of the competition, with 97.7% of respondents recognising the ending. 80.9% believed that a **.at** domain was the best option for private individuals, businesses and organisations from Austria. Only about 30% of private individuals have registered a domain, but almost 80% would choose a **.at** domain if they registered one. A wide range of reasons were given for this, with affinity, image, likeability and trustworthiness taking the top spots. In the opinion of 81% of respondents, the ending demonstrates affinity with Austria, 79.6% find the **.at** ending likeable, 79.5% said **.at** has a good image, and 74.9% found that the ending represented their home country

online. 71.7% replied that **.at** gives a sense of security, reliability and trustworthiness. There was one important change compared to a survey carried out in 2014, when only 57.4% of respondents said that the **.at** ending was dependable and firmly established.

New generic top level domains still less well known

97% of the participants are familiar with generic endings such as **.com** and **.info**. But new top level domains like **.app**, **.yoga**, **.shop** and **.theater** are yet to make the breakthrough – 45.3% said they had never heard of these endings. Conversely, 20% of respondents had visited a site with one of these endings, while 34.7% knew them by name only.

Online search – .at addresses way ahead

How do internet users go about searching for an Austrian business or artist? First and foremost, people expect to see a **.at** domain. 47.3% answered that they would click on a domain with the respective company name and a **.at** ending in a list of search results; 31.4% would do the same when searching for artists. Facebook is the clear leader when it comes to searching for private individuals (22.8%), followed by a **.at** domain. Do users type the name they are looking for into their browser's address bar and then attach a domain ending? Only 6.9% of respondents said yes; back in 2007 the figure was 31.3%. Over 60% indicated that they paid attention to the information in their browser's address bar, in particular when using government services or online banking, or when shopping online. Interestingly, older respondents seemed to be more attentive in this respect than their younger counterparts.

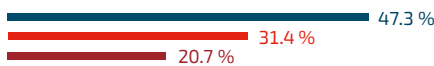
Domain know-how is for men, service is for women

Generally speaking, men seem to know more about domains than women. There are also differences between the sexes as far as the criteria for selecting a registrar are concerned. Reliability, data protection in line with EU regulations and rapid support are far more important for women than for men. Among male and female respondents, a reasonable price only took sixth place.

nic.at CONSUMER SURVEY RESULTS 2019*

.at is the number one choice when it comes to searching online for...

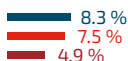
www.NAME*.at



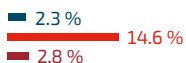
www.NAME*.de



www.NAME*.com



www.youtube.com/name*



www.facebook.com/name*



www.providername.com/name*



I have no preference and just click on the first result.



* NAME/name stands for a company, artist or person



...an Austrian company



...an Austrian artist



...a person in Austria

Can you explain the term 'domain'?

Yes – 50.4 %

No – 49.6 %

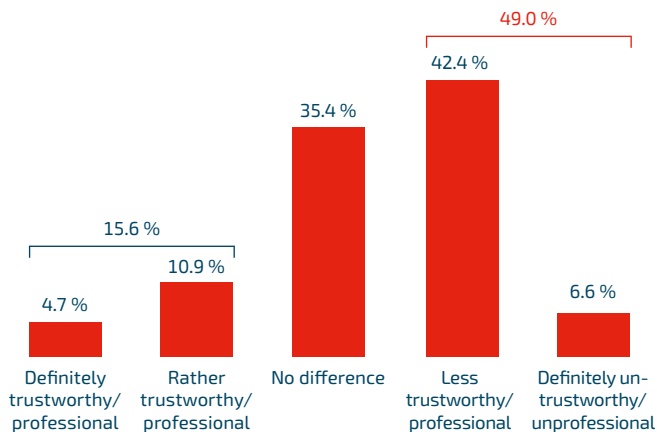


Yes – 68.5 %

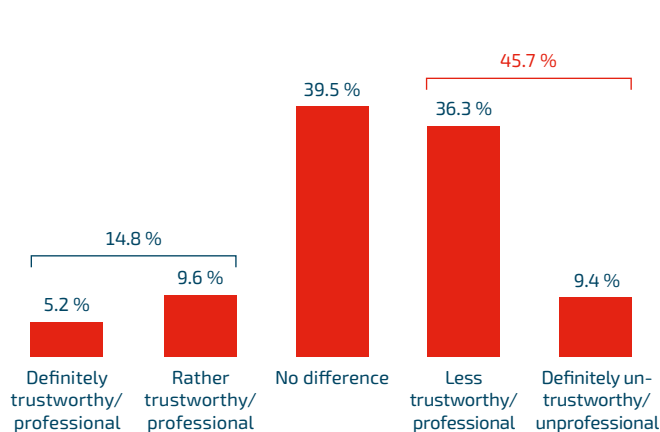
No – 31.5 %



Trustworthiness of companies/organisations that do not have their own domain for their website

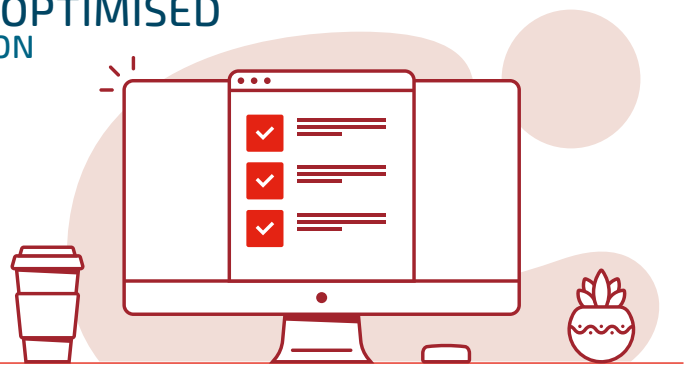


Trustworthiness of companies/organisations that do not have their own domain for email addresses

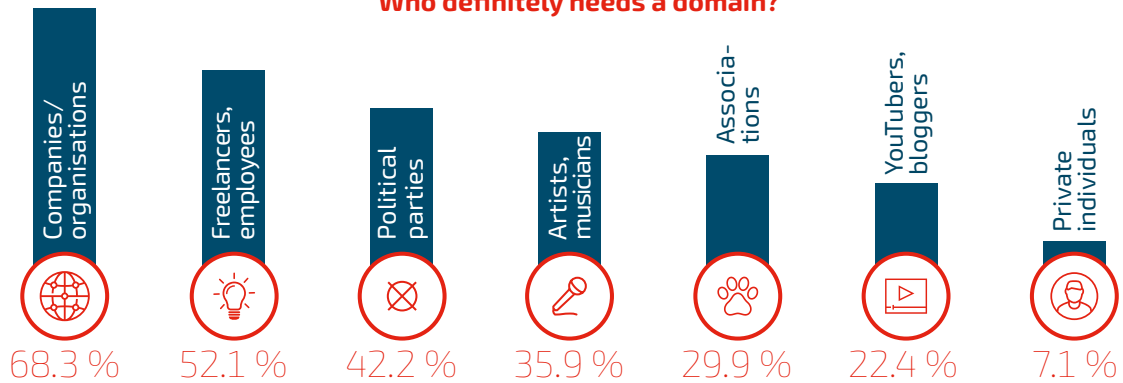


Benefits of companies/organisations having their own domains

LOCATION
SELF-PROMOTION
RECALL VALUE PROFESSIONALISM
SEARCHABILITY ESSENTIAL
RECOGNITION
TRUSTWORTHINESS VISIBILITY HONEST
FAMILIARITY CUSTOMER INFORMATION
DATA SECURITY ONLINE PRESENCE
IMAGE
PERSONAL **SEARCH ENGINE OPTIMISED**
TRANSPARENT PRODUCT INFORMATION
RELIABLE
CONSTRUCTIVE COMPETENT
ADVERTISING

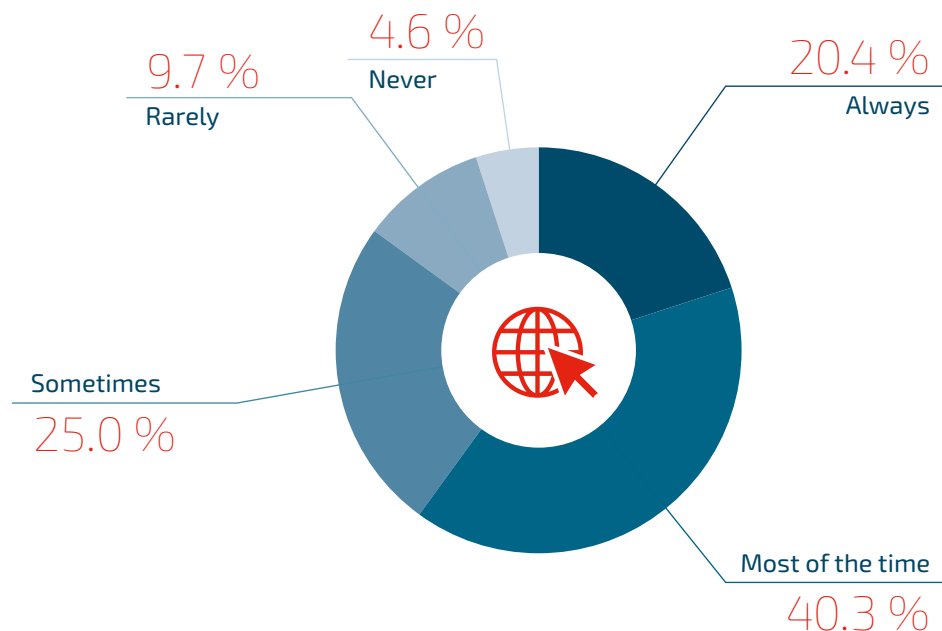


Who definitely needs a domain?



78.5% would choose a .at domain

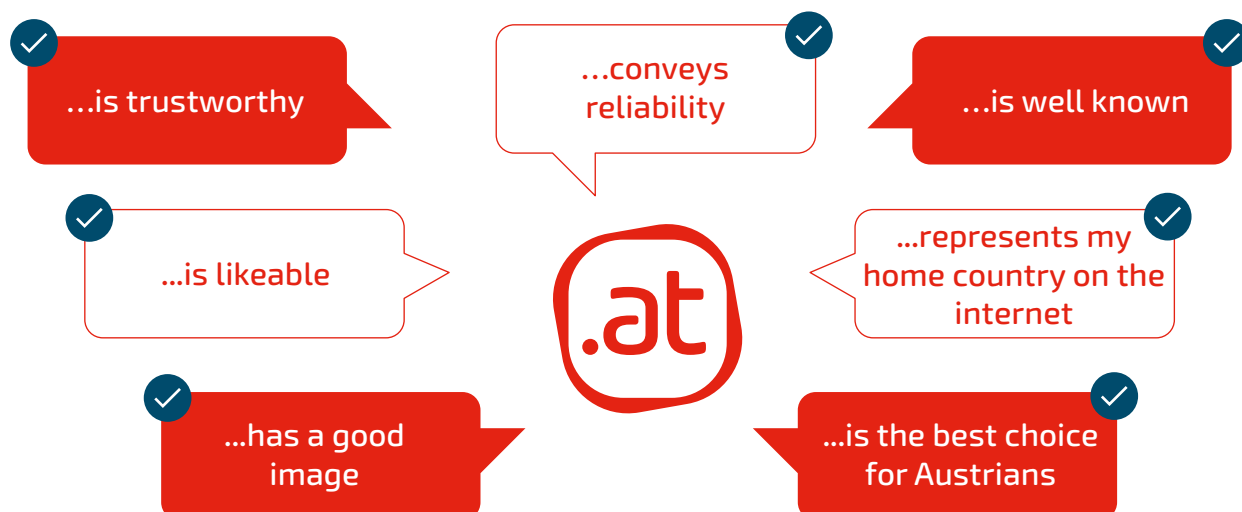
Do you pay attention to information in the address bar?



The most important criteria when choosing a registrar

	Ø	Men	Women
1. Reliability	68.2 %	63.1 %	73.3 %
2. Data protection (EU standards)	55.2 %	50.6 %	59.8 %
3. Straightforward registration	52.9 %	52.4 %	53.4 %
4. Rapid support	52.0 %	48.2 %	55.8 %
5. Good overall package	45.3 %	41.6 %	49.0 %

	Ø	Men	Women
6. Reasonable price	45.0 %	44.8 %	45.2 %
7. Austrian provider	38.0 %	32.5 %	43.6 %
8. Previous experience with provider	35.6 %	30.5 %	40.8 %
9. Well-known provider	29.5 %	23.3 %	35.7 %
10. Recommendation	22.8 %	20.5 %	25.1 %





INTERVIEW WITH STEFAN GENSASZ

Market Research Consultant at marketagent

A general point to begin with: were you surprised by any of the results of the nic.at consumer survey?

The insights it provided into general internet use largely correspond with the results we've seen in other studies. It's particularly interesting that 14.2% of Austrians only go online via their smartphones and about a third simply see surfing as a habit. One in four Austrians said they wouldn't be able to manage without the internet, and the figure is almost 40% among 14-19-year-olds. We saw similar findings in the 2018 Austrian Millennial Report, where only 19% of all respondents said that they could go without the internet for a whole week.

What stood out for us is that there are differences between age groups on some topics. Why is that?

If you look at those results in average terms, there's hardly any difference between age groups. On the whole, it seems a little bit more important to older generations that a company or organisation has its own domain. About 71% of people in the 40+ age bracket found this very important, compared with 66% of those aged between 14 and 39. On top of that, younger people are increasingly using apps to go online instead of conventional browsers, for instance when they use social media, which in turn means the address bar is losing significance in day-to-day use.

When it comes to looking for a provider, personal research online is almost twice as important as recommendations from friends or work colleagues. Is this also the case in other sectors?

This mainly seems to be related to the complexity of the product. In other areas, such as choosing everyday consumer goods, a recommendation from a friend or colleague as well as personal experience have a far greater influence on decision making. But with a specialist product like a domain – financial products are another example – people presumably don't think that friends or acquaintances have the necessary expertise. So from the consumer's perspective, the internet provides sounder, more helpful information.

A reasonable price only ranked sixth in the list of criteria for selecting a provider, and people find reliability, good support and data protection more important. Is that what you would have expected?

In my view, that's also down to the complexity of the product. In sectors where support and security aren't so relevant, prices play a far more significant role in purchasing decisions and Austrians have nothing against shopping around for bargains. But having trust in your provider is very important in this age of the GDPR and other sources of uncertainty connected with the web. When making long-term decisions like this, people don't want to take risks and they're more willing to dig a bit deeper into their pockets so that they aren't confronted with unresolved problems and unanswered questions at some stage down the line.

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