Universal Acceptance (UA)-Readiness Survey Report - Contracted Parties and Registry Service Providers

ICANN org

27 March 2023

ICANN

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1. Executive Summary

Universal Acceptance (UA) is the cornerstone to a digitally inclusive and multilingual Internet. It ensures that all valid domain names and email addresses – regardless of language, script, character length (e.g., .在线, .photography, .ไทย, .ꦲꦸꦩ) – are accepted equally by all Internet-enabled applications, devices, and systems.

To assess the UA-readiness of registry operator (RO), registrar, and registry service provider (RSP) systems, ICANN org conducted a survey to determine their state of UA-readiness. The objective was to create a baseline to understand the challenges to becoming UA-ready and to understand how ICANN org can help support contracted parties and RSPs.

The survey gathered information about their:

- Level of UA-readiness
- Types of services offered that they consider to be UA-ready (e.g., support Internationalized Domain Names, gTLDs that are longer than six characters, and internationalized domain email addresses)
- Motivations to become UA-ready
- Policies in place to support UA-readiness
- Barriers to becoming UA-ready
- Training and technical support that ICANN org can provide

In total, 89% of ROs (19), 78% of registrars (43), and 100% of RSPs (8) responded that they are UA-ready or Partially UA-ready; 11% (2) of ROs and 18% (10) of registrars stated they are not UA-ready. The primary motivations cited for becoming UA-ready are to grow their customer base (70%) and to be more competitive (65%). The most frequent barriers to becoming UA-ready centered on:

- "Other priorities" (29%)
- "Lack of UA technical expertise" (16%)
- "Do not see the need to support UA-readiness" (12%)
- "Critical 3rd party vendors who support our services are not UA-ready, but our systems are" (10%)

The survey results will be considered by ICANN org when updating its UA strategy. This survey report will be shared with the Registries Stakeholder Group (RySG), Registrar Stakeholder Group (RrSG), and relevant UA working groups.

2. UA-Readiness Status (gTLDs)

On 16 November 2022, invitations to participate in the survey were sent to 1,678 contracted parties and RSPs. The survey closed on 31 January 2023.

- Registry Operators: 885
- Registrars: 618
- Registry Service Providers: 175

Of the 1,678 organizations invited, 83 participated (18 registry operators, 55 registrars, and 8 RSPs), or 5% of the total group. The 18 registry operators represent 308 of the current 1,191 gTLDs (26%)[1] and the 55 participating registrars represent 16% of the Domains Under Management (DUMs)[2]. The 8 RSPs represent 565 or 47% of current gTLDs. Additionally, as represented in Table 1 below, the respondents represent a cross-section geographically.

Table 1: Geographic Distribution of Survey Respondents

Geographic Region	Registry Operators	Registrars	RSPs
Africa (AF)		4% (2)	
Asia/Australia/Pacific (AP)	20% (4)	39% (21)	13% (1)
Europe (EU)	45% (9)	37% (20)	38% (3)
Latin America and the Caribbean	5% (1)	4% (2)	
North America (NA)	30% (6)	17% (9)	50% (4)

At the beginning of the survey respondents were asked to select their level of UA-readiness by choosing "Yes", "Yes-partially", or "No" based on the following definition:

UA-readiness means all software applications (including, for example, email and webforms) accept, validate, process, store, and display correctly and consistently for all valid domain names and email addresses including short or long new gTLDs and IDNs.

For example:

- universal-acceptance-test.icu - a new short gTLD
- universal-acceptance-test.international - a long gTLD
- ยูเอทดสอบ.ไทย - an Internationalized Domain Name (IDN)
- อีเมลทดสอบ@ยูเอทดสอบ.ไทย - an internationalized email address (EAI)

Based on the definition of UA-readiness above, Figure 2 shows the distribution of UA-readiness for all respondents with 50% of ROs (10), 28% of registrars (15), and 75% (6) of

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[1] Data from 2022 Registry Payments
[2] Data from 2022 Registrar DUMs report

RSPs stating that they are UA-ready, while 40% of ROs (8), 50% of registrars (27), and 25% of RSPs (2) stated they are "partially" UA-ready.
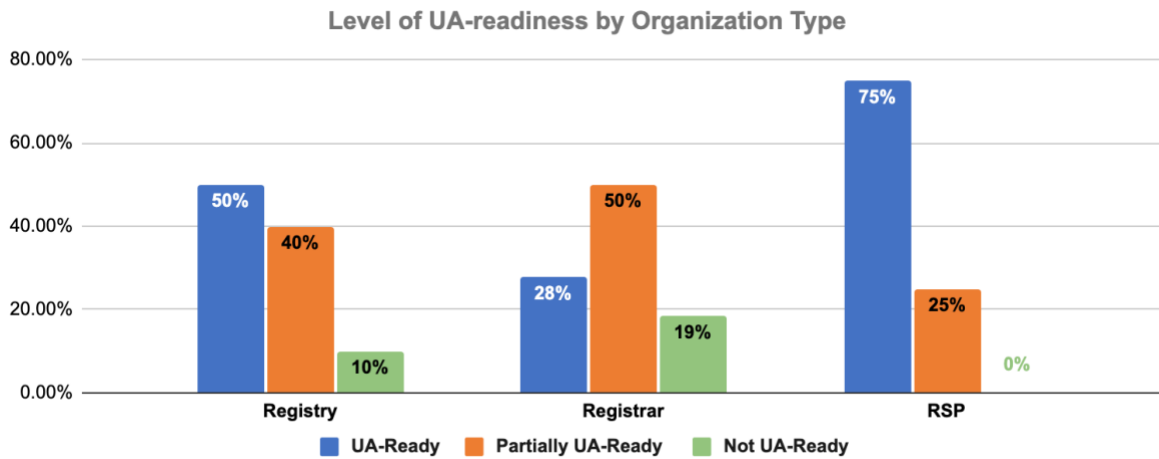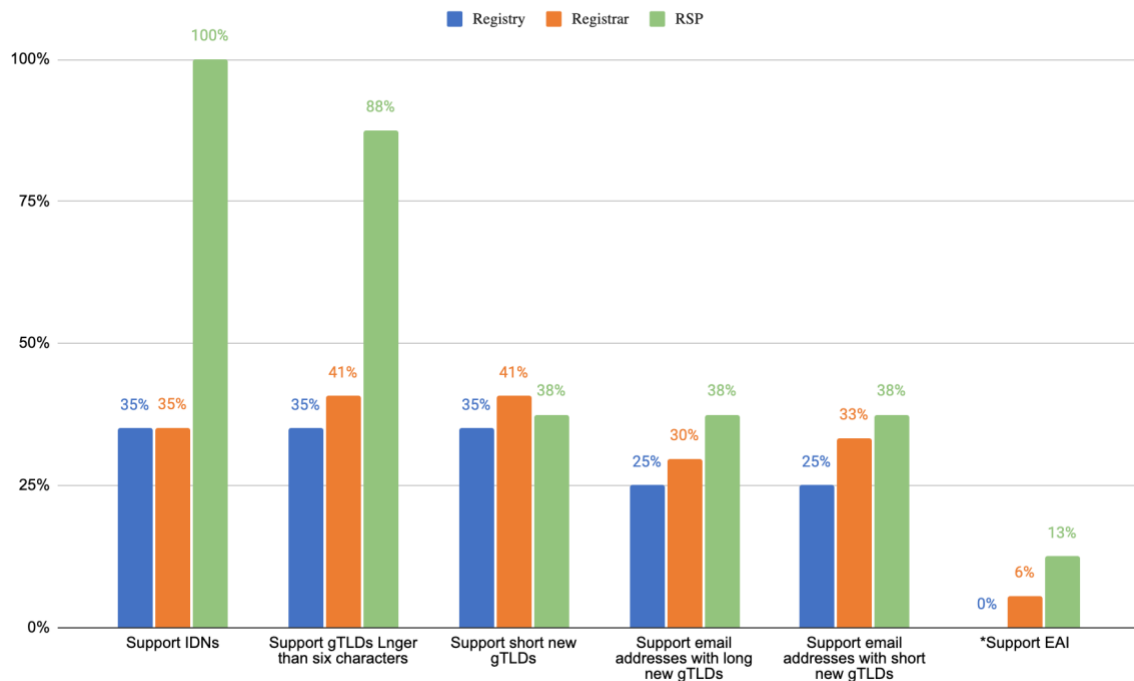
Figure 1: Level of UA-Readiness by Organization Type

Figure 3 represents the 8 registry operators, 27 registrars, and 2 RSPs that responded they are "Partially" UA-ready. The service supported the most across all entities is IDNs (57%) and the service supported the least is EAI.

Figure 2: What Partially UA-Ready Organizations Support

EAI = Email Address Internationalization
*0% of RSPs responded that they support EAI*

2.1 Motivation: gTLD Entities That Are UA-Ready

As part of this study, ICANN org wanted to understand what motivated organizations to become UA-ready. As Figure 4 illustrates, the primary motivations include: "To grow our customer base" (70%), "To be more competitive" (64%), "To gain more international customers" (51%), "In response to the requests of our customers" (43%), and "Implement before the next round" (28%). Note: respondents could select more than one response. The option "Implement before the next round" refers to the Subsequent Procedures Resolution passed by the ICANN Board in March 2023.

Verbatim responses for why the four registrars who selected "Other" to the question of what their motivation was to become (or not become) UA-ready:

- No demand
- RO implemented UA at launch
- Wanted to support special characters for the local language
- We have been supporting all but the international email addresses for many years.

Figure 3: Motivation to Become UA-Ready by Organization Type
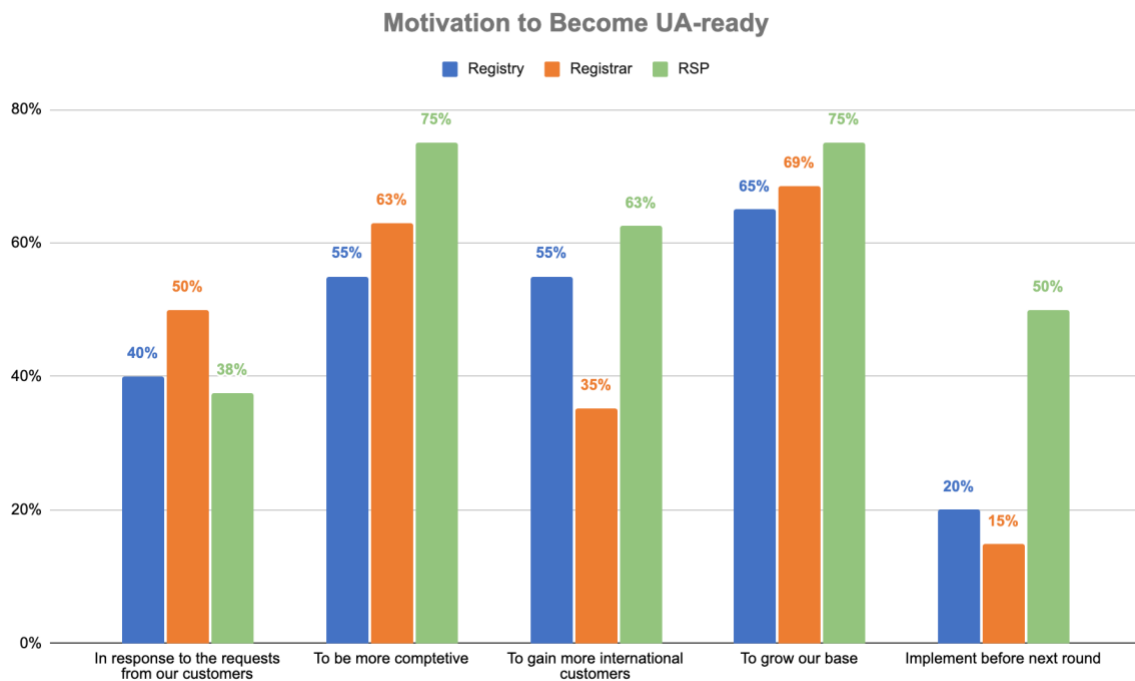
For organizations that indicated they are not UA-ready or are only partially UA-ready, there is an even split that becoming UA-ready is and is not on their roadmap. However, if an organization did have UA-readiness on their roadmap the majority indicated that they "Don't know or are not sure" when their organization plans to be UA-ready. For the registrars that stated that UA-readiness is on their roadmap, the most common time frame indicated was "1-3 years" while one registry operator indicated "3 or more years".

2.2 UA-Ready Policy Support for gTLDs

Despite the high percentage of organizations stating they are UA-ready, only a small percentage have created internal policies to support UA (7%) or have made their policies aware to third party stakeholders.

To the question of whether or not organizations have created internal policies to support UA only 20% of organizations answered "Yes" with the majority, 76%, responding "No". Similarly, most organizations acknowledge that they have not collaborated with business partners/stakeholders to implement UA-readiness policies, but plan to do so.

Only 1 RSP responded with "No, but plan to do so".

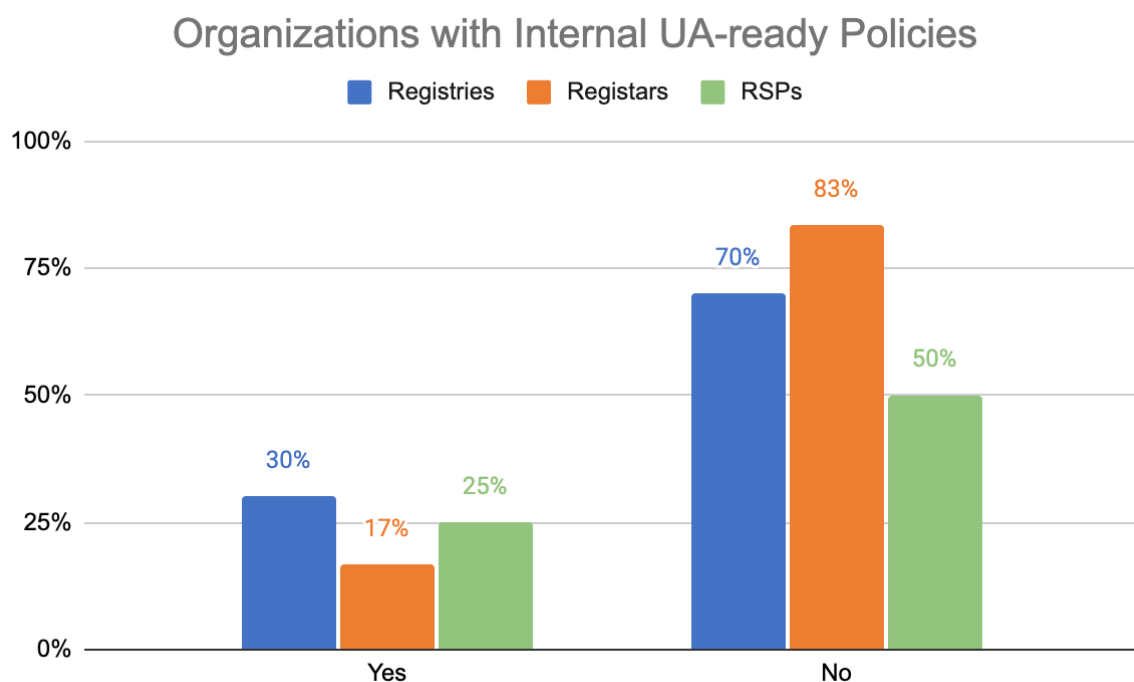*Figure 4: Internal Policy Support by Organization Type*

Organizations with Internal UA-ready Policies

Figure 5: UA-Ready Policies with Business Partners/Stakeholders by Organization Type:

Organizations with UA-ready Policies with Stakeholders/Partners
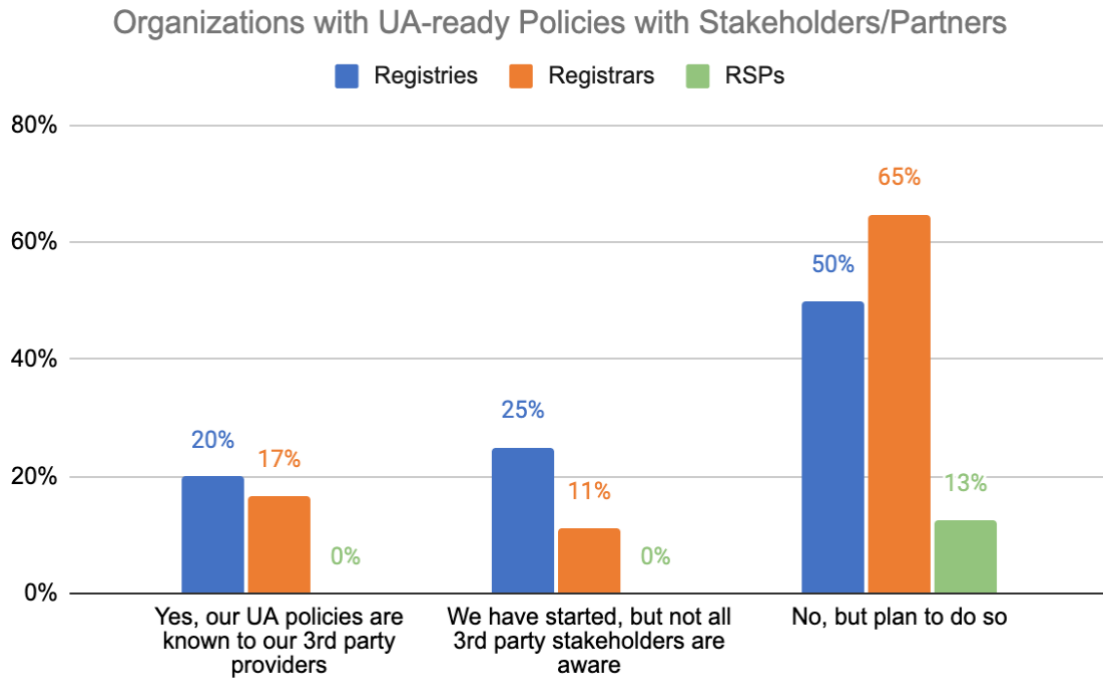
2.3 Barriers to Becoming UA-Ready

To the question "What, if any, are/were the barrier(s) for your organization becoming UA-ready?", the respondents could select more than one response. The most frequent response for both ROs and registrars was "Other Priorities" at 30% and 54% respectively, followed by "Lack of UA technical expertise".

Figure 6: Barriers to Becoming UA-Ready

Barriers to Becoming UA-ready
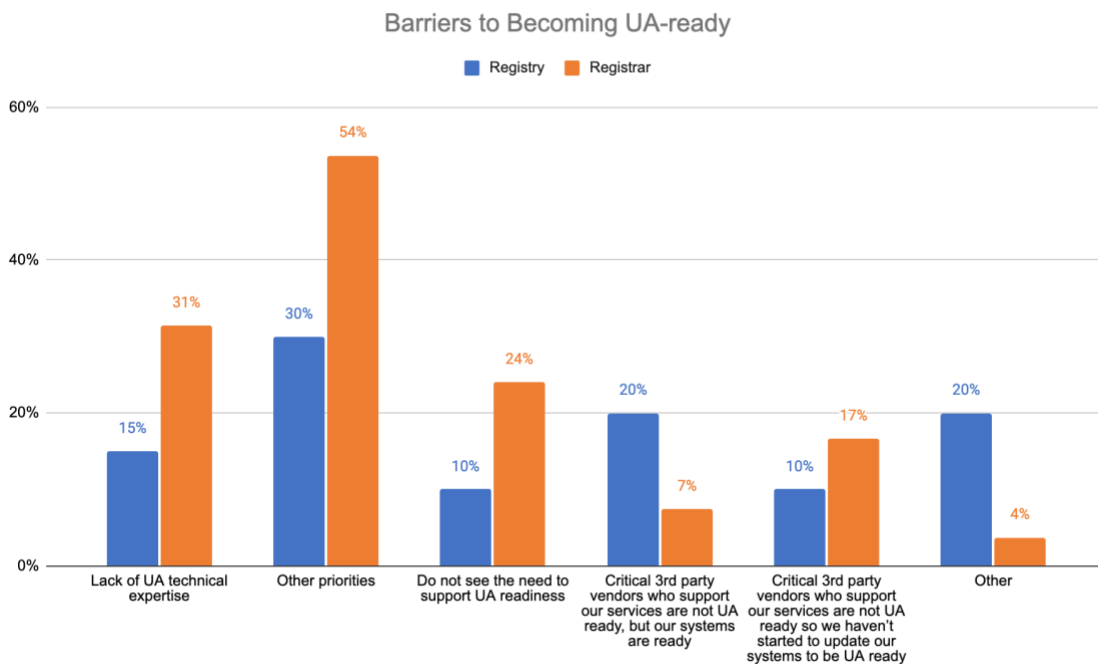
The verbatim of "Other" responses include:
- Zero demand from registrants. No sense spending time and money on something that will generate zero return.
- Lack of resources. We are a small registry/registry backend operator.
- We actually do not know how many registrars/stakeholders are UA-compliant. They will have their respective system complexities to implement UA.

3. Training and Awareness of ICANN Org Resources

When asked if the organization's staff and/or stakeholders needed training on UA practices and UA-readiness the majority stated that although some of their staff has been trained, more training is needed. Specifically, less than 25% of registries' staff have been trained and would like more training while the majority of registrar staff have not been trained and require training. Interestingly, 30% of registries and 20% of registrar staff have not been trained and they state no training is needed.

Figure 7: UA-Readiness Training Needs for Staff
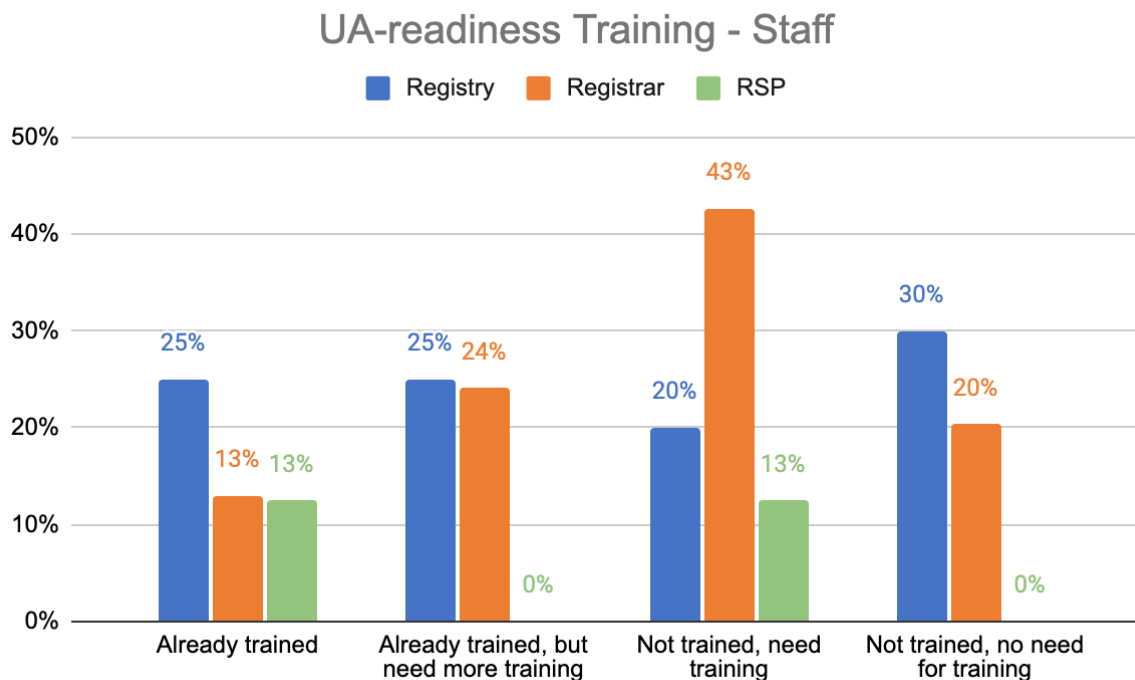
There is a larger percentage of registrar respondents who have not trained their 3rd party partners and stakeholders on UA-readiness and state that training is needed.

Figure 8: UA-Readiness Training Needs for Stakeholders

UA-readiness Training - 3rd Party Partners/Stakeholders

Legend: ■ Registry ■ Registrar ■ RSP

- Already trained: Registry 30%, Registrar 11%, RSP 0%
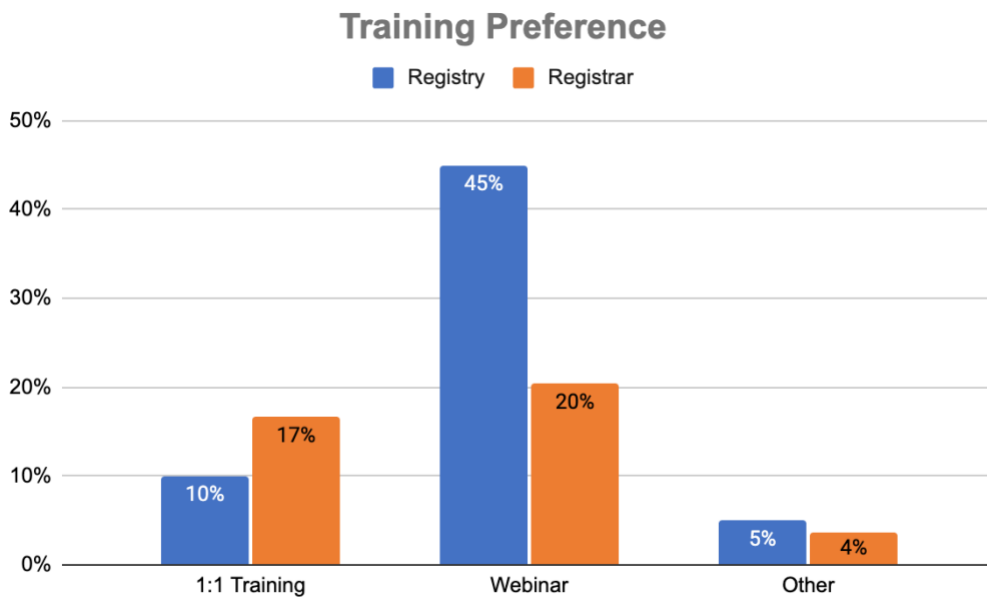- Already trained, but need more training: Registry 15%, Registrar 13%, RSP 0%
- Not trained, need training: Registry 35%, Registrar 54%, RSP 13%
- Not trained, no need for training: Registry 30%, Registrar 19%, RSP 0%
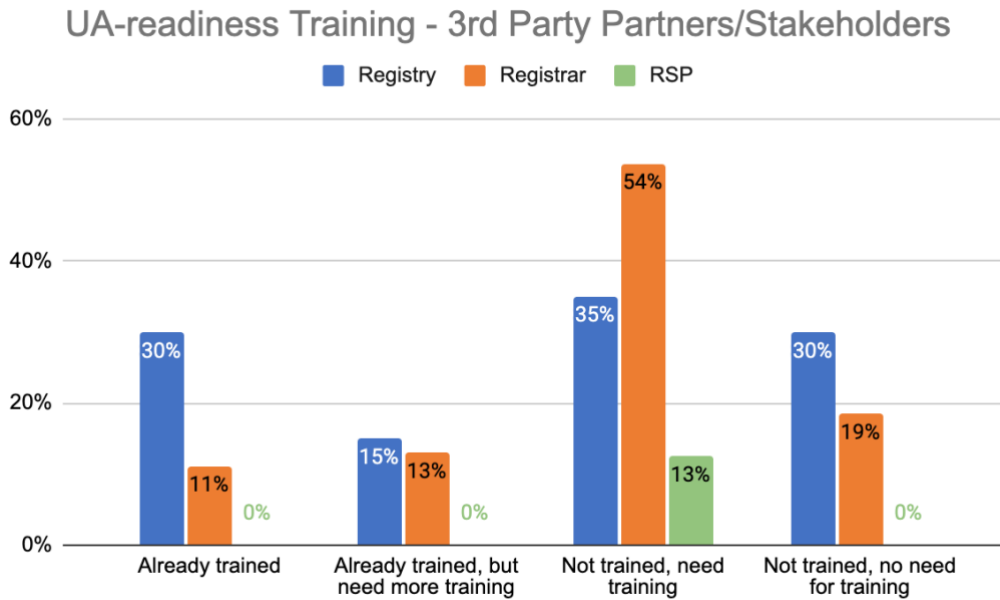
When asked about what type of training they would like for their organization, 45% of registries and 20% of registrars selected "Webinar" while 10% of registries and 17% of registrars selected "1:1 Training", and 5% of registries and 4% of registrars selected "Other".

Figure 9: Training Preferences by Organization

Training Preference

Legend: ■ Registry ■ Registrar

- 1:1 Training: Registry 10%, Registrar 17%
- Webinar: Registry 45%, Registrar 20%
- Other: Registry 5%, Registrar 4%

Comments added for those that chose "Other" include:

- Guidance, best practice, training materials, how-to guides, use cases, etc.
- Promote the value of UA-readiness with third party vendors as they need to recognize and implement support for gTLDs. This has been a slow process because registries are forced to individually contact and convince third parties to develop support, which has led to fragmented support and an anti-competitive landscape. Registries need an organization in a leadership position to champion UA for all gTLDs.
- Documentation and email resource for answering questions.
- ICANN should continue to educate and apply pressure on leading platforms and social media entities to correctly linkify and validate email for new gTLDs, some examples where new domains are not correctly linked include Slack, Gmail, Meta, Twitter, WhatsApp, and Instagram.
- White papers
- 1:1 training might be required to align expectations.
- Technical support
- Specific examples of UA-readiness not being supported in other registrars, how to support the industry as a whole.

*Figure 10: Awareness of ICANN Org Technical Resources by Organization Type*
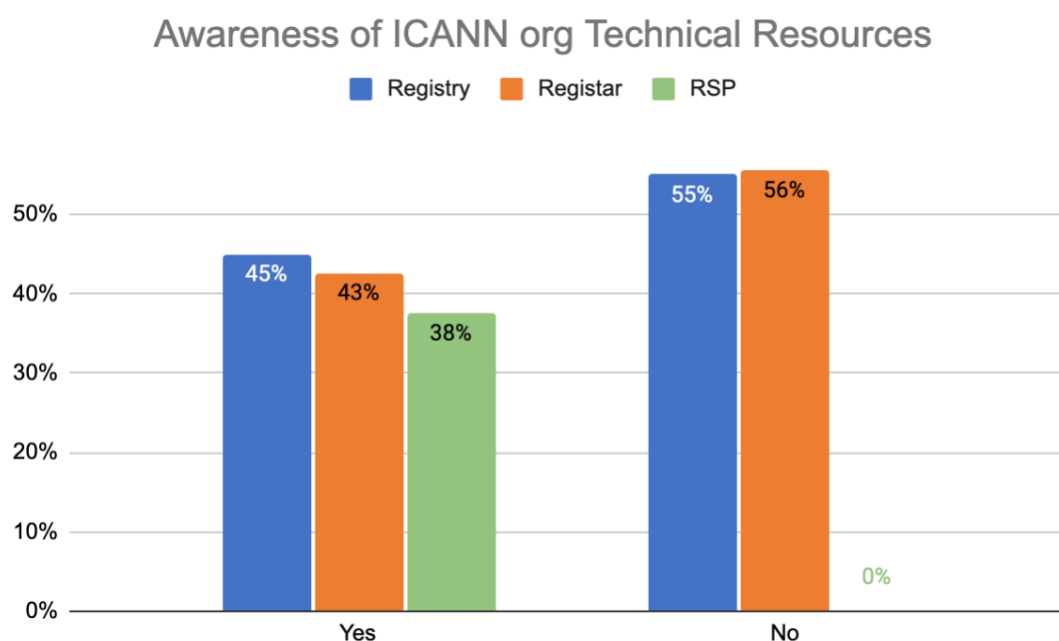
When asked if the organizations were aware of the technical resources and support available from ICANN org, the majority of ROs and registrars stated they are not aware of the technical resources available. One RSP responded that they were aware of the technical resources available.

4. Registrar Web Hosting Tools

Among the three entities surveyed, registrars have the unique opportunity to offer web hosting tools to support their customers. As such, additional questions were added to the registrar survey to ask about the UA-readiness of their web hosting tools. The majority (76%) of the respondents reported that they support short new gTLDs while 70% support gTLDs longer than six characters. 44% of registrars also reported that they support IDNs while 19% support EAI.

Figure 11: UA-Readiness of Web Hosting Tools Used by Registrars
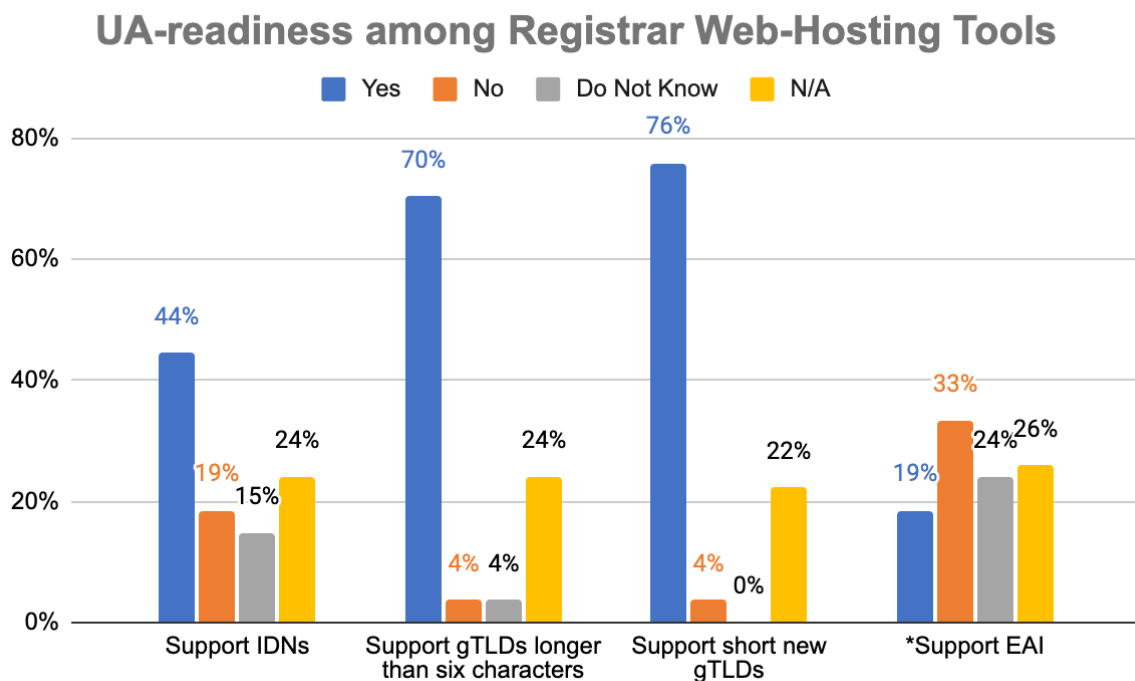
5. Conclusion

Overall, it is evident that contracted parties and RSPs have made UA-readiness one of their priorities and have dedicated resources to becoming UA-ready with 84% of registry operators and registrars and 100% of RSPs stating they are UA-ready or partially UA-ready. Of the UA services supported, the majority of the organizations support IDNs, short new gTLDs, and gTLDs longer than six characters, but only a small percentage of the organizations support EAI.

The level of UA-readiness seems independent to the size of the organization. This is relevant as an assumption could be made that larger organizations have more resources and, therefore, are able to dedicate those resources to become UA-ready versus smaller organizations.

The predominant motivations to become UA-ready are to grow the organization's existing base of customers, to be more competitive, and to gain more international customers. Conversely, the primary barrier to becoming UA-ready is due to other priorities. Further, while the majority of respondents stated they are UA-ready or partially UA-ready the organizations indicated they do not have internal UA policies in place or with their business partners or stakeholders. In subsequent surveys it may be prudent to delve into this further by asking why UA policies are not a priority for the organizations.

It is interesting to note that while the majority of organizations state they are UA-ready or partially UA-ready, only a small percentage of their staff and stakeholders have been trained. Moreover, these organizations want training or more training than what has been put in place. Based on the comments provided when organizations selected "Other", it is clear that there is an expectation that ICANN org will provide support by promoting and communicating the value of UA-readiness with third-party platforms, apps, and mail systems.

When asked about whether the organizations were aware of the technical resources available from ICANN org, nearly half of the respondents stated that they are aware. It is recommended that ICANN org promote the technical resources available to support UA-readiness during the UA Day activities.

6. Next Steps

ICANN org will continue supporting UA-related efforts within the ICANN community. Additional training materials based on the survey results will be made available on https://www.icann.org/ua.

The results will be considered when ICANN org updates its UA strategy. This report will be published and shared with relevant UA working groups within the ICANN community as well as other organizations that share the same goal of enabling an Inclusive internet.

The UA-readiness survey is planned to be conducted periodically to measure progress over time and to get updated requirements on how ICANN org and the ICANN community can work together to address UA-readiness issues.

7. Appendix - Survey Methodology

The survey was open to the contracted parties and RSPs for 76 days. The invitation to participate in the UA-readiness survey was sent on 16 November 2022 and closed on 31 January 2023.

The Smartsheet Survey tool was used to design the questionnaire. A separate link to the questions, in Smartsheet, was sent to the Registry and Registrar Primary and Secondary Contacts and the Primary and Secondary contacts for the Backend Technical Service Providers (RSPs). The set of questions were consistent across all three entity types while an additional four questions were asked of registrars regarding the level of UA-readiness across their web hosting tools.

The questionnaire provided guided responses for the majority of the questions (e.g., "yes" or "no") to be selected via radial style options and in some instances more than one selection could be made (e.g., what barrier(s) are/were there for your organization to become UA-ready). Additionally, if the respondent selected "Other" to questions 9 and 16, the option to provide more detail in a free form text box was made available. A list of the survey questions and the guided responses are below.

Survey Questionnaire

Organization Name*
Your organization's name *(required to submit this form)*
Full Name*
Your full name *(required to submit this form)*
Email Address*
Your email address *(required to submit this form)*

What is UA-Readiness?

UA-readiness means all software applications (including, for example, email and webforms) accept, validate, process, store and display correctly and consistently for all valid domain names and email addresses including short and long new gTLDs, and IDNs.

For example:

- universal-acceptance-test.icu - a new short gTLD
- universal-acceptance-test.international - a long gTLD
- ยูเอทดสอบ.ไทย - an Internationalized Domain Name (IDN)
- อีเมลทดสอบ@ยูเอทดสอบ.ไทย - an internationalized email address

1. Does your organization offer registrations under any gTLDs, which offer Internationalized Domain Names (IDNs) at the second level? (e.g., 회사.TLD)

◯ Yes   ◯ No

2. Does your organization offer registrations under any gTLDs that are longer than six characters? (e.g., example.photography)

◯ Yes   ◯ No

3. Considering the UA-readiness definition above, do you consider your organization's systems UA-ready?

◯ Yes   ◯ Yes, partially   ◯ No

4. If you answered "Yes" to question #3, how long did it take to update your systems to be UA-ready?

◯ In progress

◯ Within last 12 months

◯ Within last 24 months

◯ Longer than 24 months

◯ Don't know/Not sure

5. If you answered "Yes, partially" to question #3, please indicate which answer best describes your level of UA-readiness.

◯ Support domain names with short new gTLDs (e.g., universal-acceptance-test.icu)

◯ Support domain names with longer new gTLDs (e.g., universal-acceptance-test.international)

◯ Support IDNs

◯ Support email addresses with short new gTLDs (e.g., email-test@universal-acceptance-test.icu)

◯ Support email addresses with long new gTLDs (e.g., email-test@universal-acceptance-test.international)

◯ Support internationalized email addresses (e.g., อีเมลทดสอบ@ยูเอทดสอบ.ไทย)

6. If you answered "No" to question #3, is UA-readiness on your organization's roadmap?

◯ Yes   ◯ No

7. If you answered "Yes" to question #6, when does your organization plan to start working on UA-readiness?

◯ Within the next 12 months

◯ 1-3 years

◯ 3 or more years

○ Do not know/Not sure

8. What was the motivation at your organization behind supporting UA?

(Please check all that apply)

○ To grow our customer base

○ To gain more international customers

○ To be more competitive

○ In response to the requests from our customers

○ We want to implement UA before the next round

○ Other

9. If you selected "Other" to question #8, please specify other motivation(s) behind supporting UA at your organization.

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10. Has your organization created internal policies to support UA?

○ Yes ○ No

11. Has your organization collaborated with your business partners/stakeholders to implement UA-readiness policies (i.e., registries, resellers)?

○ Yes, our UA policies are known to our 3rd party providers

○ We have started, but not all 3rd party stakeholders are aware

○ No, but plan to do so

12. What, if any, are/were the barrier(s) for your organization becoming UA-ready?

(Please check all that apply)

○ Lack of UA technical expertise

○ Other priorities

○ Do not see the need to support UA readiness

○ Critical 3rd party vendors who support our services are not UA ready, but our systems are ready

○ Critical 3rd party vendors who support our services are not UA ready, so we haven't started to update our systems to be UA ready

○ Other

13. If you selected "Other" for question #12, please specify other barrier(s) behind your organization becoming UA-ready.

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14. Does your staff need training on UA practices and UA-readiness?

◯ Already trained

◯ Already trained, but need more training

◯ Not trained, need training

◯ Not trained, no need for training

15. Have you trained, or do you plan to train your stakeholders on how to manage UA or to address customer service questions?

◯ Already trained

◯ Already trained, but need more training

◯ Not trained, need training

◯ Not trained, no need for training

16. What, if any, are your UA readiness related training needs?

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17. Are you aware of the technical resources from ICANN org that are available for becoming UA-ready?

◯ Yes   ◯ No

18. How can ICANN org support you to become UA-ready?

(Please check all that apply)

◯ 1:1 Training

◯ Webinar

○ Other

19. Please specify what other types of support, if any, ICANN org can provide to your organization to become UA-ready.

[   ]

As a registrar, do your web hosting tools...

(Please select 'Not Applicable' if your organization does not offer/provide hosting or email services.)

20. Support TLDs which offer Internationalized Domain Names (IDNs) at the second level (e.g., 회사.TLD)?

○ Yes

○ No

○ Do Not Know

○ Not Applicable

21. Support domain names with long new gTLDs (e.g., example.photography)?

○ Yes

○ No

○ Do Not Know

○ Not Applicable

22. Support gTLDs that are short new gTLDs (e.g., example.sky)?

○ Yes

○ No

○ Do Not Know

○ Not Applicable

23. Support Internationalized Email Addresses (in different languages or scripts), also called EAI?

○ Yes

○ No

○ Do Not Know

○ Not Applicable