Council of European National
Top-Level Domain Registries

DomainWire Global TLD Stat Report is CENTR's quarterly publication covering status and trends in global top-level domains with a focus on European ccTLDs (country code top-level domains).

CENTR is the association of European country code top-level domain (ccTLD) registries, such as .de for Germany or .si for Slovenia. CENTR currently counts 54 full and 9 associate members – together, they are responsible for over 80% of all registered domain names worldwide. The objectives of CENTR are to promote and participate in the development of high standards and best practices among ccTLD registries.

DomainWire

TLD Market Report

Q4 2017 *(Edition 22)*

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Growth in the **global domain market** was recorded at 1.2% YOY[1] at the end of 2017, bringing total recorded domains to an estimated 331 million.

2017 may have been a turning point for for many gTLDs with at least 1 in 3 contracting in total domains over the year[1]. In net domains, most growth came from .com, .loan and .info.

Although domain volume is not necessarily a measure of success, for many TLDs that sell to the general public, it is a strong indication of demand and can even impact viability of a Registry. In the case of gTLDs, most global demand is directed to .com, which covers roughly 70% of al gTLDs - a figure which has not changed significantly since the roll out of new gTLDs began. .com is also the second most registered TLD (after the local ccTLD) in most developed countries[3].

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ccTLDs make up around 44% of the global domain market. Of this, the largest portion is made up of European ccTLDs, which have around 72 million domains. Combined growth in ccTLDs[2] was mostly stable over 2017 and finished at 3.9% with a small trend upward.

Regionally, it was the Asian ccTLD market which showed the strongest growth (3.9%) with high relative growth in .uz (Uzbekistan), .vn (Vietnam) and .ir (Iran). In other regions, high-growth ccTLDs included: .ai (Anguilla), .nu (Niue) and .cr (Costa Rica).

1 Growth excludes brand TLDs or TLDs with < 500 domains
2 Growth excludes ccTLDs that do not update data regularly
3 Based on data from CENTR, APTLD and LACTLD

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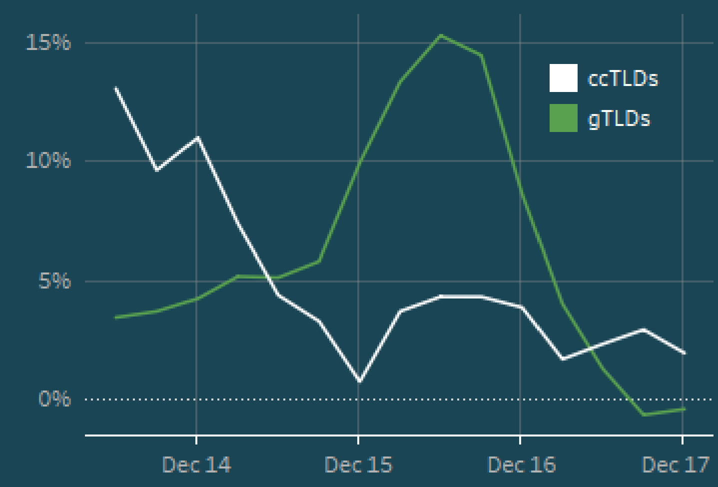
Global TLD Market

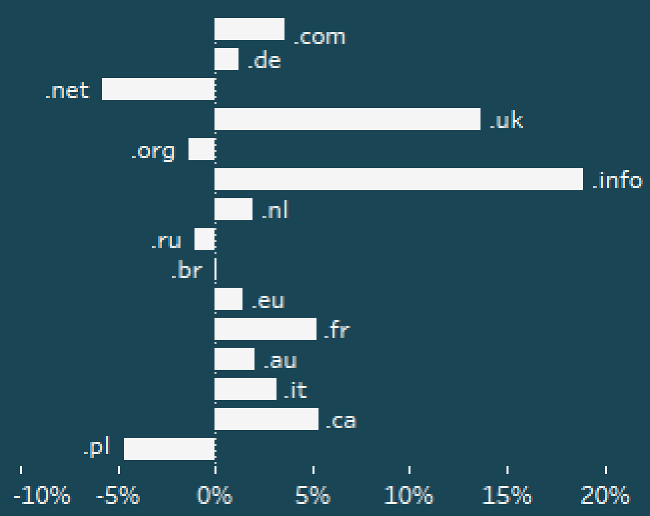
GLOBAL MARKET
Estimate domains/growth of all TLDs*

		Growth (YOY)	Domains (est. million)
ccTLDs	Africa (58)	2.9%	3.2
	Americas (53)	2.3%	13.7
	Asia (98)	3.7%	57.5
	Europe (58)	4.0%	72.1
gTLDs (1238)		-0.4%	184.7
		1.2%	331.1

YOY GROWTH (ROLLING)
(Combined ccTLDs and gTLDs*)



TLD GROWTH (YOY)
Top 15 TLDs by total domains



* all growth figures on this page exclude TLDs that do not update regularly

In 2017, the **European ccTLD market** saw a general stabilisation after a long-term slowdown in growth. Median growth rates flattened across all size groups converging toward 3.0% annually, with a small upturn in mid-size ccTLDs. The market is estimated at around 72 million domains across 58 ccTLDs with overall growth at 4.0% YOY.

Among the largest ccTLDs, the high growth was largely driven by gains in .uk and .se (due to campaign activity). The median growth in this group was recorded at 2.7%.

Other high growth (%) ccTLDs over 2017 were .al (Albania) at 12.6%, .pt (Portugal) at 11.9%, .fi (Finland) at 7.9% and .ie (Ireland) at 6.4%.

Market Share

European ccTLDs make up an estimated 59% of all locally registered domains in Europe and as a whole have outpaced gTLD growth in the region. Eastern countries tend to have the higher ccTLD market share* rates, the highest being Russia (78%), Romania (78%) and Slovakia (73%).

Countries where ccTLD market share increased the most were the UK (+2.3%), Lithuania +1.9%), Sweden (+1.1%), Iceland (+1.0%) and Ireland (+0.8%).

New gTLD market share remains low with a country average[1] of 3.6%. Over the year, total new gTLDs grew by an estimated 235K. This contrasts with legacy gTLDs, which grew by 858K, most of which was in .com.

*Country market shares figures are estimates based on locally registered ccTLD (national and other European ccTLDs included) and gTLD domains. Market share analysis excludes countries where over 80% of the local ccTLD is registered by foreign registrants
1 Country average calculated over 37 countries.

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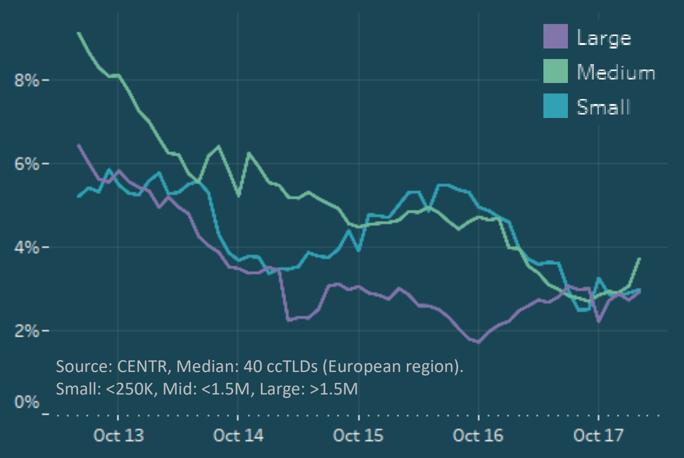
European ccTLD Market

	Growth (YOY)	Domains (est. million)
Large ccTLDs (12)	4.2%	59.7
Medium ccTLDs (13)	3.3%	10.9
Smaller ccTLDs (20)	2.7%	1.7
		KPIs
ccTLD Market Share (overall)		59%
Renewal Rate (median)		83%
Add / Delete ratio (median)		19% / 13%

Calculations based on value at end of quarter and based on 46 ccTLDs in the region.
Market share sample based on 37 countries Europe. See last page for ratio calculation

YOY MEDIAN GROWTH (ROLLING)
(European ccTLDs grouped by zone size)



YOY GROWTH
Top 10 largest ccTLDs (CENTR)

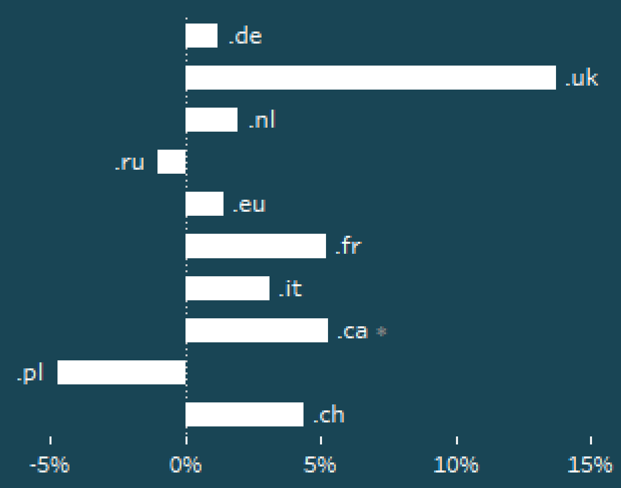


*Chart shows top 10 CENTR full members. CENTR full members are mostly based in European region with exception of.ca (Canada).

As a whole, the gTLD market shrank marginally (-0.4%) in 2017 and finished the year with an estimated 185 million domains. .com maintains its dominance with roughly 70% of the gTLD market and still growing at rates similar to the most developed ccTLDs around the world. Of the larger legacy gTLDs, .com and .info were the only ones to maintain consistent positive growth over the past 12 months with other long-standing gTLDs in this category in decline.

New gTLDs: At the end of 2017, there were around 20 million domains under management – a decrease of over 4.5 million driven in part by large declines in .xyz and .top. Excluding these TLDs, overall growth in new gTLDs was at 18% YOY. Over the year, distribution of new gTLDs has also widened with the top 10 now representing 50% of all new gTLDs (down from 67% at the start of 2017).

Over 2017, a third of new gTLDs declined in total domains[2]. However, several new gTLDs grew strongly whilst maintaining relatively low parking ratios[3]. They were .blog (+249% to 130K), .loan (+146% to 2.1 million) and .accountant +80% to 95K).

Geographic gTLDs grew at a median rate of 2.7% over the year - the highest gains were in .london, .tokyo and .nrw.

The parking ratio over all combined new gTLDs is estimated at 63% with a small decline in that trend over the past 6 months. TLDs with lowest parking ratios are .wedding, .blog, .中文网, .loan and .手机.

1 Parked statistics sourced from ntldstats.com.
2 Excludes recently launched and brand TLDs. Sample of 425 new gTLDs that had a minimum of 1000 domains at the start of the 2017.
3 low ratios mean under 50% parked

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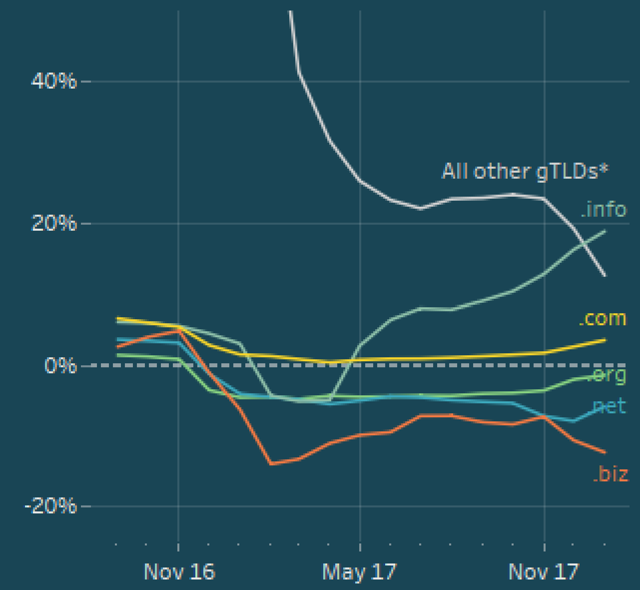
Global gTLD Market

	Growth (YOY)	Domains (est. million)	% all gTLDs
.com	3.6%	130.4	70.7%
Other legacy (13)	-1.8%	34.3	18.6%
Geographic (58)	16.1%	0.7	0.4%
All other (600)	-20.0%	18.9	10.2%
	-0.4%	184.7	

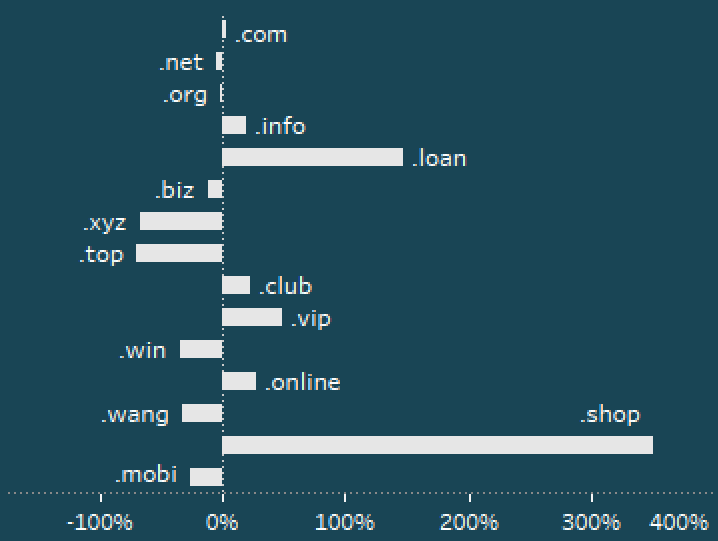
Brand TLDs excluded. See last page for gTLD grouping descriptions

YOY GROWTH (ROLLING)
(selected legacy gTLDS + all others combined)



To avoid impacts of outlier values, .xyz and .top are filter out

YOY GROWTH
(Ordered by top 15 largest gTLDs)



Explore gTLD interactive stats at stats.centr.org/gtlds

SOURCES AND METHODOLOGIES

ccTLD registrations: CENTR member registries (European ccTLDs) and co-operation with APTLD (Asia Pacific region ccTLDs) and LACTLD (South America and Carribean ccTLDs). Other ccTLDs supplemented by data from Zooknic. When data on a ccTLD is not reliable, meaning it is not updated from quarter to quarter, it is not included in growth calculations within this report.
gTLD registrations: ICANN (CZDS) and direct zone downloads with TLD operators.
Parking statistics (on new gTLDs only): https://ntldstats.com/parking/tld. Percentages expressed (parked domains as a proportion of total domains) are based on the total domain counts ntldstats.com provides.
European country market share: geographic distribution of domain location (registrant) sourced from CENTR member registries (ccTLDs) and Zooknic (gTLDs). Market share averages at country level include domains registered from foreign European ccTLDs.

RATIOS USED IN THIS REPORT

The following are calculations for ratios used in this report. Ratios are calculated monthly.
Add ratio: total adds over previous 12 months / total domains (current)
Delete ratio: total deletes over the previous 12 months / total domains (current)
Renewal rate: renews / (renews + deletes).

TERMS

ccTLD – a Country Code Top-Level Domain (ccTLD) is a two-character top-level domain used and reserved for a country or independent territory. Examples include .uk for the United Kingdom or .de for Germany.
gTLD – a Generic Top-Level Domain (gTLD) is a 3 or more character string. Examples include .com, .org .club, .london
IDN – An Internationalised Domain Name is a domain that contains at least one label that is displayed in software applications, in whole or in part, in a language-specific script or alphabet, such as Arabic, Chinese, Cyrillic, Tamil, Hebrew or the Latin alphabet-based characters with diacritics or ligatures, such as French (source: Wikipedia). A ccTLD IDN is an IDN at the top level – e.g., the ccTLD IDN for the Russian Federation is .РФ, which is the Cyrillic script version of .ru.
Registrant – The individual or organisation that registers a specific domain name. A registrant holds the right to use that domain name for a specified period of time.
Registry – An internet domain name registry receives domain name information into a centralised database and transmits the information in internet zone files so that domain names can be found by users around the world via the web and email.
Market Share – TLD market share in European countries is calculated by using the locally registered domains under each TLD group (ccTLD, new gTLD, legacy gTLD) in over 30 European countries measured as a percentage of their sum (source: CENTR and ZookNic). Market share averages are calculated quarterly.

Grouping

gTLDs and ccTLDs are sometimes grouped to assist analysis and calculations. The below outlines the TLD that may be used within these groups.
'Legacy' gTLDs: .asia, .biz, .com, .coop, .info, .jobs, .mobi, .name, .net, .org, .pro, .tel, .travel, .xxx
'Geo' (Geographic) TLDs: .abudhabi, .africa, .alsace, .amsterdam, .barcelona, .bayern, .berlin, .boston, .brussels, .budapest, .bzh, .capetown, .cologne, .cymru, .doha, .dubai, .durban, .eus, .frl, .gent, .hamburg, .helsinki, .ist, .istanbul, .joburg, .koeln, .kyoto, .london, .madrid, .melbourne, .miami, .moscow, .nagoya, .nrw, .nyc, .okinawa, .osaka, .paris, .quebec, .rio, .ruhr, .ryukyu, .saarland, .stockholm, .sydney, .taipei, .tirol, .tokyo, .vegas, .vlaanderen, .wales, .wien, .xn--1qqw23a, .xn--80adxhks, .xn--mgbca7dzdo, .xn--xhq521b, .yokohama, .zuerich
'European ccTLDs': .am, .at, .be, .bg, .by, .ca, .ch, .cy, .cz, .срб, .de, .dk, .ee, .es, .eu, .fi, .fo, .fr, .gg, .gi, .gr, .hr, .hu, .ie, .im, .is, .it, .je, .li, .lt, .lu, .lv, .me, .mt, .nl, .no, .pl, .pt, .РФ , .ro, .rs, .ru, .se, .si, .sk, .tr, .ua, .uk, .va.

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CENTR would like to thank the Regional Organisations (LACTLD, APTLD and AfTLD) for their continued support in the development of statistical reporting for the global ccTLD community. ccTLD data sourced by CENTR comes via direct automated communication with CENTR ccTLD members, CENTR surveys and other ongoing data collection.

ABOUT CENTR

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For any questions on this report, please contact patrick@centr.org