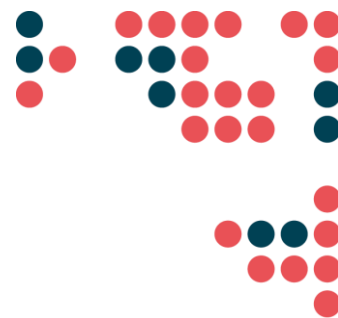




Council of European National
Top-Level Domain Registries

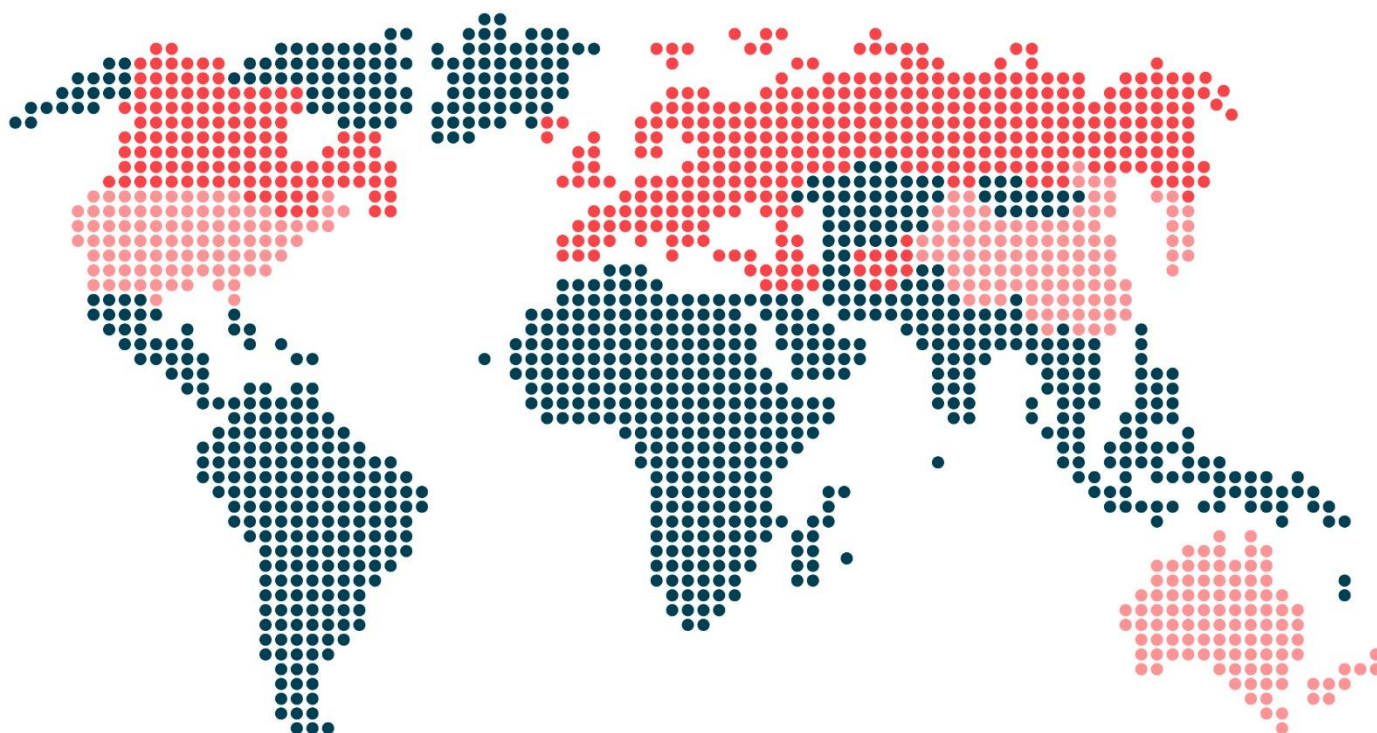


CENTRstats Global TLD Report is CENTR's quarterly publication covering status and trends in global top-level domains with a focus on European ccTLDs (country code top-level domains).

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 country code domain names worldwide. The objectives of CENTR are to promote and participate in the development of high standards and best practices among ccTLD registries.

CENTRstats Global TLD Report

Q2 2018 – Edition 24



Global TLD Market

The **global TLD market** grew 2.0% YOY at the end of Q2 2018, taking total recorded domains to an estimated 337 million. Globally, gTLDs have the largest share with the largest slice (40%) attributed to .com. Growth rates in .com have been steadily increasing since early 2017 with current rates at around 5.2% YOY. This contrasts to another legacy gTLD, .net which has contracted 6% in the same period.

Across the regions, average ccTLD growth has continued positively with highest rates found in Africa, where ccTLDs such as .ng (Nigeria), .ke (Kenya) and .za (South Africa) have seen strengthening growth in registrations. Other ccTLDs around the world that are growing strongly include .ai (Anguilla, often promoted as a TLD for artificial intelligence), .uz (Uzbekistan), .nu (Niue), .az (Azerbaijan) and .mx (Mexico).

Interactive dashboards

For an interactive dashboard on global TLD statistics as well as analysis on gTLDs, visit CENTRstats at <https://stats.centri.org/tldstats>

* Growth calculations exclude TLDs with inconsistent or unreliable registration data.

GLOBAL MARKET | JUL 2018

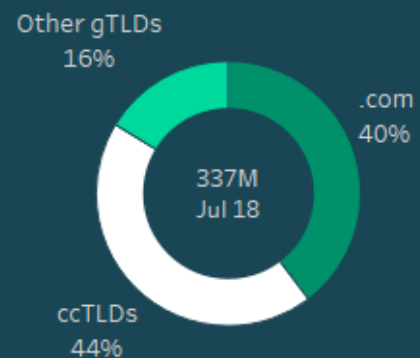
Estimate domains/growth of all TLDs*

		Domains (est. million)	Median* Growth (1Y)
ccTLDs	Africa (58)	3.3	8.7%
	Americas (53)	13.8	2.2%
	Asia (98)	59.2	3.3%
	Europe (57)	72.0	3.1%
gTLDs (1,203)		188.9	13.0%
		337.3	

*Medians based on largest TLDs in group up to the top 100. Excludes TLDs with unreliable or inconsistent data

GLOBAL TLD MARKET SHARE

Estimate by total domains | Jul 2018



GROWTH (1Y) OF LARGEST TLDs*

Top 15 TLDs ordered by total domains | Jul 2018



European Market

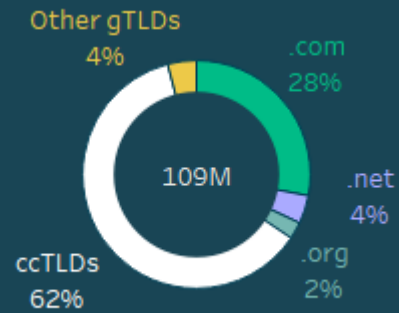
European ccTLDs grew a combined 2.9% YOY to 72 million domains in total. Of all locally (European region) registered domains, ccTLDs make up an estimated 62% of the market with the rest split between gTLDs as seen in the chart (right).

Over the past 2 years, ccTLDs in Europe have seen significant stabilisation of long-term average growth rates (see chart right). Most are growing in the range of 2-4% annually. This stability is also reflected in annualised add and renewal rates, which average 18.6% and 80.4% respectively. However, the average deletion rate of the top 25 largest ccTLDs has been increasing marginally over the course of 2018. Average deletion rate (annualised) at the end of Q2 was 14%, compared to [12%].

In many European countries, the local ccTLD is the dominant TLD in terms of local registrations, with an average market share of 54% (calculation includes local registrations of non-local ccTLDs such as .eu). However, analysis of the top 500 web pages* shows that .com holds higher visibility in page views, although it's worth noting that many of .com sites in the top 500 are some of the most visited sites globally.

EUROPEAN TLD MARKET SHARE

Estimate based on locally registered domains*



Source: CENTR

* based on 36 CENTR member countries in European region

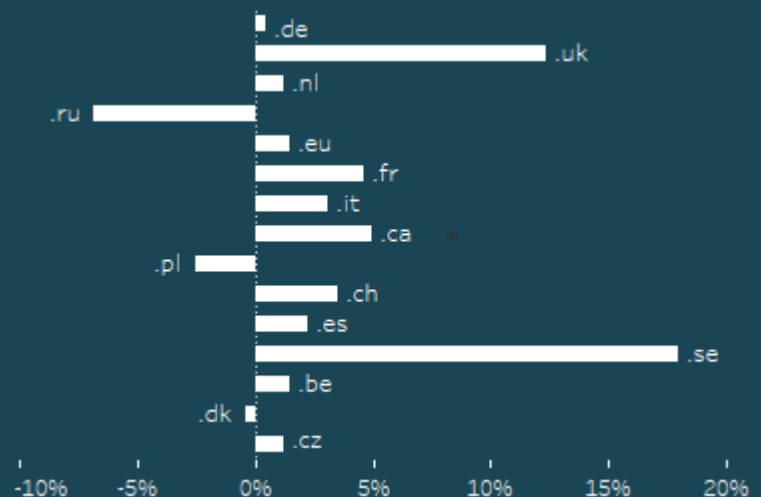
EUROPEAN ccTLD MEDIAN GROWTH

Median 1Y growth (rolling) of total domain



GROWTH (1Y) CENTR MEMBER ccTLDs

Top 15* ordered by total domains | Jul 2018



Source: CENTR

*Although most CENTR members are based in European region, .ca (Canada) is included as they are a full member of CENTR.

* Web traffic data sourced from Alexa. Analysis made on the top 500 domains by total page views per million, then aggregated to the TLD.

Global gTLDs

gTLDs grew a combined 1.6% over the past 12 months, pushing up total domains to around 189 million. With exception of legacy gTLDs such as .com, .org, etc., many new gTLDs are still in growth phase with add ratios averaging 40% and renewals still relatively low. Average add and park ratios are both stable and deletion rates have been declining over the past 12 months.

Below are short profiles of selected gTLDs with high recent growth

.fun is geared toward entertainment (e.g. fun parks, arcades, comedy, etc.) and grew from 11K to 94K in the space of a year (574%). A majority of domains are held between Namecheap, Alibaba and GMO, and are being sold as low as \$1USD.

.ltd opened for general availability in June 2016 and has grown to 454K domains. The TLD aims at businesses (LTD being an abbreviation for 'limited company' in many countries) and most registrations currently come from Alibaba - a Chinese registrar with large holdings of .top and .club.

.work targets a broad market of retail, construction and tech businesses as well as employment-related services. It has seen high rates of new domains added over the past year with roughly 70% of domains currently held with the Japanese registrar GMO.

.shop launched in late 2016 and has grown to just under half a million domains with a couple spikes and dips along the way, most likely due to promotions. Rates of new adds are high, but in recent months, the deletion ratio is trending upward.

Notes: Parked domains are domain names without association to services such as e-mail or a website. Parked statistics sourced from ntdstats.com. Growth calculations excludes recently launched and brand TLDs.

gTLD MARKET OVERVIEW

Key statistics and ratios

Total domains	188.9M
Growth (1Y, all combined)	1.6%
KPIs Median Top 300	
Growth (1Y)	12.4%
Renewal rate (Av)	68.9%
Add ratio	39.9%
Delete ratio	23.6%
Park ratio	61.1%

Brand TLDs excluded. Renewal, add and delete ratios are based on a 3 - 4 month lag. See last page for ratio methodologies

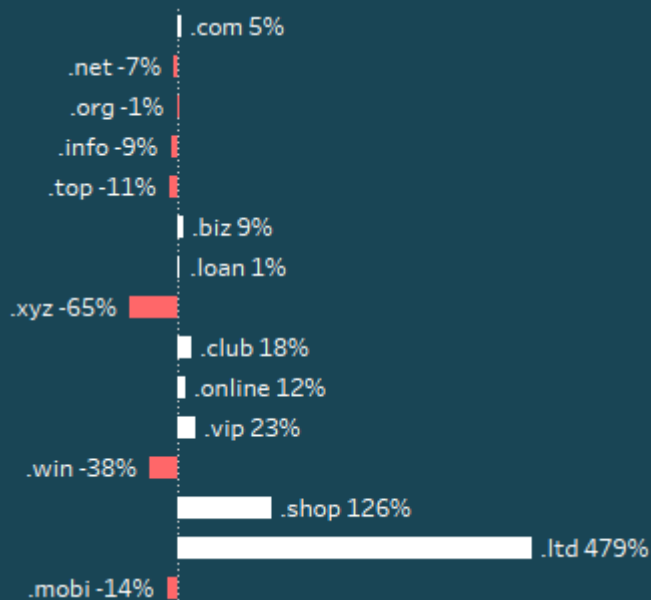
gTLD MEDIAN GROWTH

1Y rolling growth median of top 300 largest gTLDs



GTLD GROWTH (1Y)

Top 15 largest gTLDs | JUL 2018



SOURCES AND METHODOLOGIES

ccTLD registrations: CENTR member registries (European ccTLDs) and co-operation with APTLD (Asia Pacific region ccTLDs) and LACTLD (South America and Caribbean 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 ntlstats.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. These ratios are calculated by CENTR on a monthly basis.

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).

Park ratio: based on definition of parked domains at <https://ntldstats.com/parking/tld> as a proportion of total domains

Note that renewal, add and delete ratios for gTLDs have a 4-5-month lag in data.

Exclusions in data – Some calculations in this report exclude TLDs with limited or unreliable data.

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 .PФ, 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, .cpб, .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, .PФ, .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