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 55 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

Q3 2018 – Edition 25

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Global Market

The **global TLD market** is estimated at 344 million domains. The median growth of total domains over the past 12 months was 5.7%, which represents a small decrease compared to 12 months prior.

ccTLDs make up 44% of the global domain market, most of which comes from the European market. In percentage terms, ccTLDs in Africa have grown the highest over the past 12 months, although from a relatively small base. ccTLDs in Asia and the Americas have slowed down, particularly among Latin American and Caribbean ccTLDs where median growth was 1.4% YOY at October 2018.

Overall, domains under the new gTLDs total some 22.5 million – up 11% from 1 year prior. While many new gTLDs are growing well, roughly one third of the top 300 have contracted over the year. Larger legacy gTLDs such as .net, .org and .info have also seen declines, while .com has been increasing its growth rates. New entrant .app exploded into the market in the middle of year and has around 320K domains so far.

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GLOBAL MARKET OVERVIEW | Oct 2018

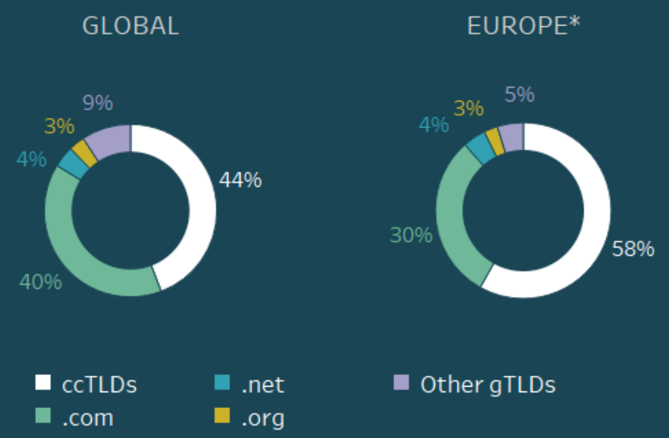
Estimate market: 344.2M domains (1501 TLDs)

		Domains (est. million)	Median* Growth (1Y)
ccTLDs	Africa (58)	3.4	6.2%
	Americas (53)	13.9	1.4%
	Asia (98)	63.3	2.9%
	Europe (57)	71.7	2.7%
gTLDs (1,232)		191.9	7.1%
		344.2	5.7%

* based on available data of TLDs with over 1000 domains.
Excludes TLDs that do not publish or share data and brand TLDs

MARKET SHARE

By total domains | Oct 2018



Top 15 LARGEST TLDS*

Ordered by total domains | Oct 2018

			Domains	Growth 1Y
1	.com	-	135.9M	5.1%
2	.de	Germany	16.2M	-0.3%
3	.net	-	13.9M	-6.1%
4	.uk	United Kingdom	11.9M	9.8%
5	.org	-	10.3M	-0.5%
6	.nl	Netherlands	5.8M	0.8%
7	.info	-	5.0M	-17.6%
8	.ru	Russian Federation	5.1M	-7.4%
9	.br	Brazil	4.0M	1.7%
10	.eu	European Union	3.7M	-1.4%
11	.fr	France	3.3M	4.7%
12	.au	Australia	3.2M	0.9%
13	.it	Italy	3.1M	2.6%
14	.ca	Canada	2.8M	5.2%
15	.top	-	3.2M	49.1%

* Excludes TLDs that do not publish or share data

CENTRstats Global TLD Report Oct 2018

European ccTLDs

For many European ccTLDs, 2018 has been focused around GDPR. This has no doubt left some with less marketing resources, but despite this, registrations have continued with relative stability. Although the long term growth average continues to decline, it is doing so at a much reduced rate. At the end of the third quarter however, the median growth hit a new low of 2.7% (1.5% for the top 10 largest ccTLDs). Driving this decline was a sharp slow down in rates of new adds between March and August 2018, particularly among some of the larger ccTLDs. This was aggravated by deletes which did not reduce at the same level. Despite this, the average renewal rate remained strong at a median of 84% (slighly lower at 81% among the top 10 largest ccTLDs).

Across Europe, the average local market share to ccTLDs is estimated at 58% for registrations and 37% for local web traffic*. In both cases, the figures are higher when filtered to central and eastern European countries.

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

Key figures | Medians

Calculated on 46 European ccTLDs - Oct 2018

Growth (1 year)	2.7%
Renewal Rate	84.1%
Add ratio	18.8%
Delete ratio	14.5%

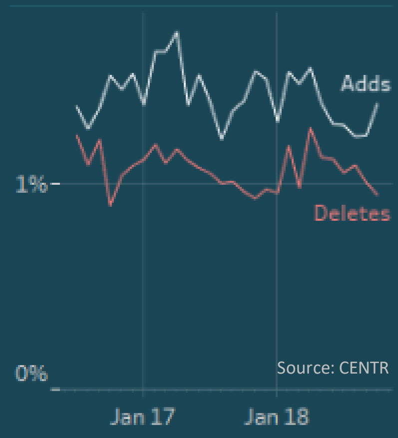
Add/delete ratios are annualised. See last page for methodology

Domain growth

Median 1Y net growth in total domains

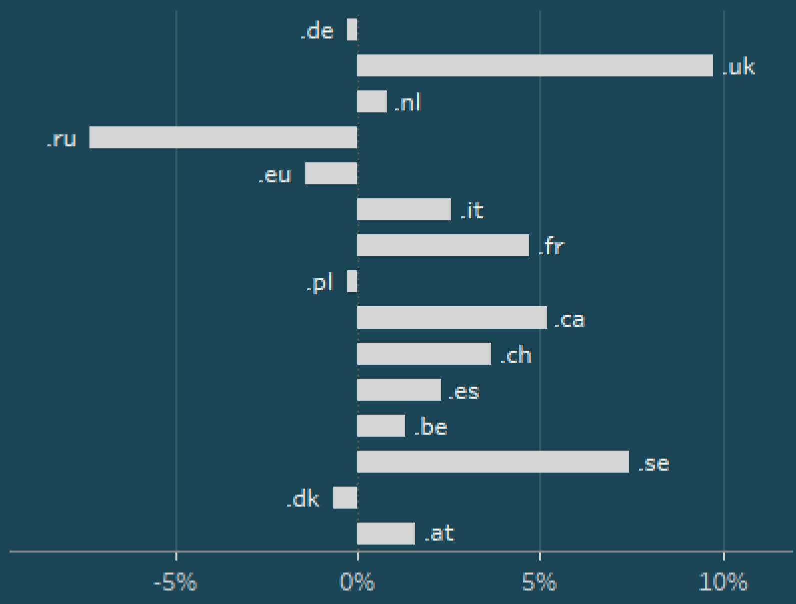
Adds/deletes

Median add/delete ratio



Domain growth (1Y)

Top 15* ordered by total domains | Oct 2018



Source: CENTR

*.ca (Canada) is exceptionally added to the above European focused chart, given its status as CENTR full member

CENTRstats Global TLD Report Oct 2018

Global gTLDs

gTLDs across all categories are estimated at 191 million globally and had a median growth of 9.7% over the past 12 months (top 300). This growth is expected to be forced downwards due to increases in both the average deletion rate (see right) as well as declines in average renewal rates.

Growth rates in .com have been steadily increasing for over a year. The increase appears to have been driven by a noticeable upwards trend in average renewals (reflected in a higher renewal rate) as well as a modest incline in the rate of new adds. .com's growth in the past 12 months was 5.1% - this compares to a benchmark of 4.3% over the top 10 largest gTLDs. These figures may be interesting to follow given the recent NTIA contract amendment repealing price controls on the .com wholesale price[1]. A wholesale price increase in .com may have the potential to impact the massive secondary market of domain speculation and warehousing of .com for some registrars. This, coupled with the increasing awareness of new gTLDs may result in a changing gTLD landscape in the future.

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1 https://www.ntia.doc.gov/press-release/2018/ntia-statement-amendment-35-cooperative-agreement-verisign

Key figures | Medians

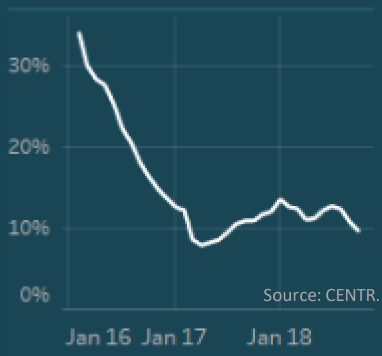
Calcaulated on top 300 gTLDs - Oct 2018

Growth (1 year)	9.7%
Renewal Rate	62.5%
Add ratio	38.2%
Delete ratio	23.8%

Brand TLDs excluded. Renew/add/delete ratios have 3 - 4 month lag and are annualised
See last page for methodology

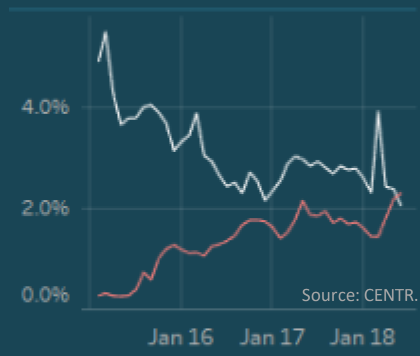
Domain growth

Median 1Y net growth in total domains



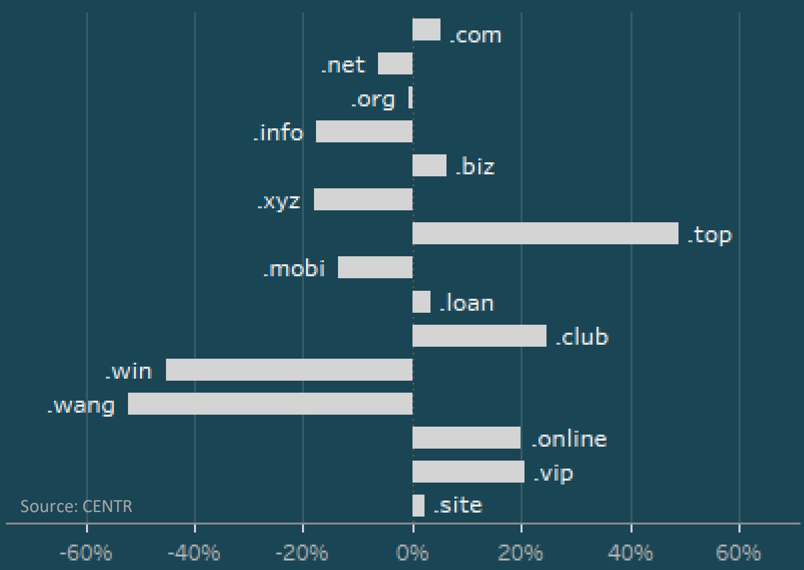
Adds/deletes

Median add/delete ratio



Domain growth (1Y)

Top 15 largest gTLDs | Oct 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 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. 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. In most cases, total domains counts are recorded at the beginning of each month.

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 .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.

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

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