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

Q1 2018 – Edition 23

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The **global TLD market** grew 1.4% YOY at the end of Q1 2018, bringing total recorded domains to an estimated 333 million[1]. In terms of market share, 44% of domain names globally are ccTLDs and 56% are gTLDs. These figures have not changed significantly over the past year or two, despite the addition of hundreds of new gTLDs in that period.

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As at April 2018, ccTLDs grew a combined 3.5% YOY with the largest net growth within the European region, which added some 2.5 million domains.

While ccTLDs in Europe, Asia and the Americas are all averaging similar percentage growth (2 - 4% YOY), the African region has shown signs of increasing growth over the past 2 years. High growth ccTLDs in the African region recently were .zw (Zimbabwe), .tn (Tunisia) and .cm (Cameroon).

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gTLDs grew a combined 0.2% over the past year, dragged down by declines in .top, .org, .net. .biz. The largest gTLD, .com, grew at just over 4% and maintains 46% of the global TLD market.

High percentage gains were made by .art, .ltd, .work, .stream, .reise and .wedding. More on gTLDs on page 3.

1 Growth calculations exclude TLDs with inconsistent or unreliable registration data

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Global TLD Market

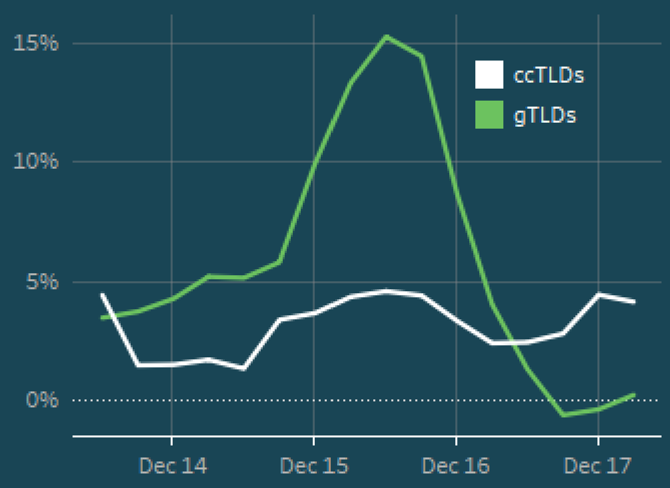
GLOBAL MARKET | APR 2018

Estimate domains/growth of all TLDs*

		Growth (YOY)*	Domains (est. million)
ccTLDs	Africa (58)	16.2%	3.3
	Americas (53)	3.6%	13.7
	Asia (98)	1.8%	37.6
	Europe (58)	3.6%	72.2
gTLDs (1,238)		0.2%	186.5
		1.4%	333.1

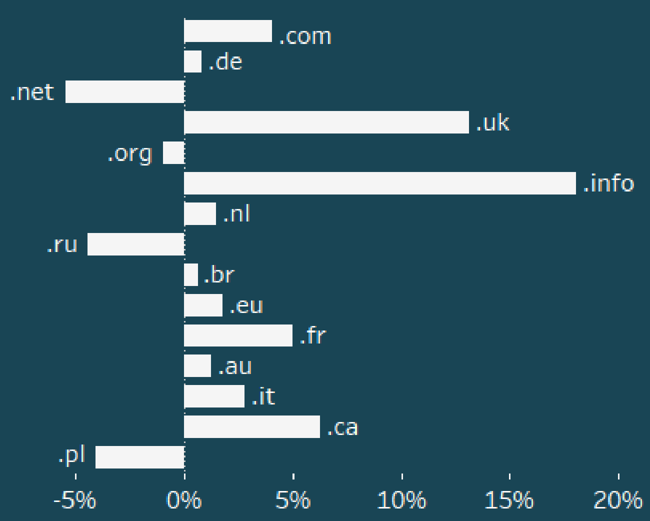
GROWTH | COMBINED BY TLD TYPE

Rolling YOY | combined* ccTLDs & gTLDs



TLD GROWTH (YOY) | TOP 15 TLDS

Top 15 TLDs ordered by total domains | APR 2018



*Some figures exclude TLDs with inconsistent data. See last page for more detail

The European ccTLD market grew 3.6% YOY and continues a period of stable growth (see chart) with some ccTLDs even reversing the slowing growth seen in previous years. The stabilisation in growth is in part due to a decline in average deletion rates along with flat rates of new domains and renews.

The TLD market in Europe is estimated at 100 million domains (locally registered ccTLD & gTLDs) [1] of which 59% is made up of European-based ccTLDs – an increase of around 1% YOY. The increase is in part due to declines in local registrations under .biz, .info, .mobi, .net and .org across in most countries. New gTLDs represent less than 2% of domains in Europe and as a whole have not grown significantly over the past year.

At country level, the local/national ccTLD is most commonly the TLD of choice[1] and is generally followed by .com. .eu is often within the top 5 and over the past year, it has grown the highest (%) in Austria, Portugal and Croatia.

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New research conducted by CENTR into European ccTLD pricing shows a median retail price of 10 EUR (ex-tax, new registration)[2] with a range of 1-60 EUR. At registry level, the median whoelsale price is 6 EUR ex-tax. Research has shown that there is a reasonably strong positive correlation between wholesale and retail prices, suggesting registrars adjust their prices to support the underlying wholesale price.

1 - Market shares calculated on locally regisered domains under ccTLD, gTLDs and other European ccTLDs. Sample: 37 countries.
2 - CENTR full member survey Jan 2018 and research on 200+ registrar price points (based on largest registrars of European ccTLDs).

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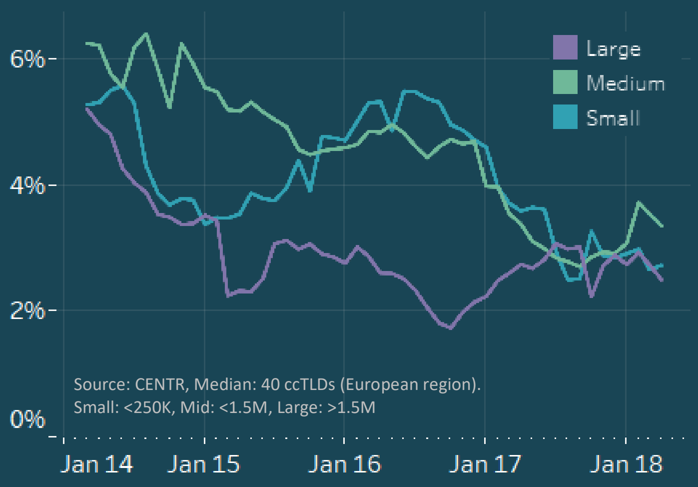
European ccTLDs

	Total Growth (YOY)	Domains (est.million)
Large ccTLDs (12)	3.7%	59.7
Medium ccTLDs (13)	3.0%	10.9
Smaller ccTLDs (20)	3.4%	1.7
	3.6%	72.3

Source: CENTR. APR 2018.

GROWTH | MEDIAN BY REGISTRY SIZE

YOY rolling - grouped by ccTLD domain count



GROWTH YOY | TOP 20 CENTR MEMBERS

Top 20 largest CENTR members | APR 2018

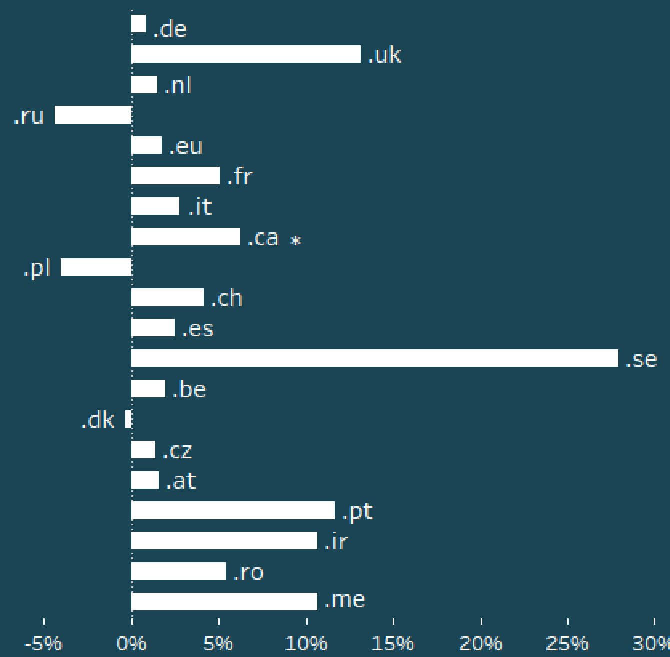


*Chart shows top 20 CENTR full members. CENTR full members based largly in the European region with exception of.ca (Canada).

Combined gTLDs grew marginally (0.1%) over the past 12 months and is estimated at 186 million domains. Of the legacy gTLDs, .com and .info are the only ones to have maintained consistent positive growth over the past year (4.1% and 18% YOY respectively at April 2018). Other larger legacy gTLDs such as .net, .org and .biz have all declined in total domains.

Of new gTLDs from the 2012 ICANN application round, roughly a third have contracted over the past 12 months. In contrast, the rate of domain names that are parked[1] has fallen from an estimated 63% in January to 59% in April 2018. The lowest rates of parked domains are within the geographic TLD category.

.com maintains around 71% of the global gTLD market with the rest attributed to other legacy gTLDs (18%) and new gTLDs at around 11%. .com is also predicted to retain and potentially increase this share given its growth trend (right), which has been increasing. Average deletion rates in .com have slowed, which may explain the upward growth trend.

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Geographic gTLDs grew at a median rate of 1.9% YOY. Despite relatively low growth in this group, geographic TLDs also have some of the lowest rates of domain parking among all new gTLDs, suggesting end-user take up and usage may be higher than other gTLDs – this is likely to assist in their longer term sustainability.

1 Parked domains are domain names without association to services such as e-mail or a website. 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.

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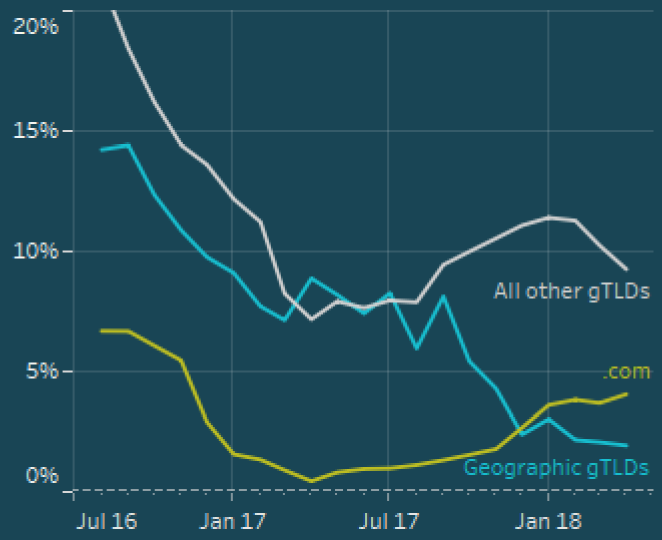
Global gTLDs

	Total Growth (YOY)	Domains (est. million)	% all gTLDs
.com	4.1%	132.3	71%
Other legacy (13)	-0.6%	34.0	18%
Geographic (58)	17.1%	0.7	<1%
All other (603)	-20.4%	18.9	10%
	0.1%	186.0	

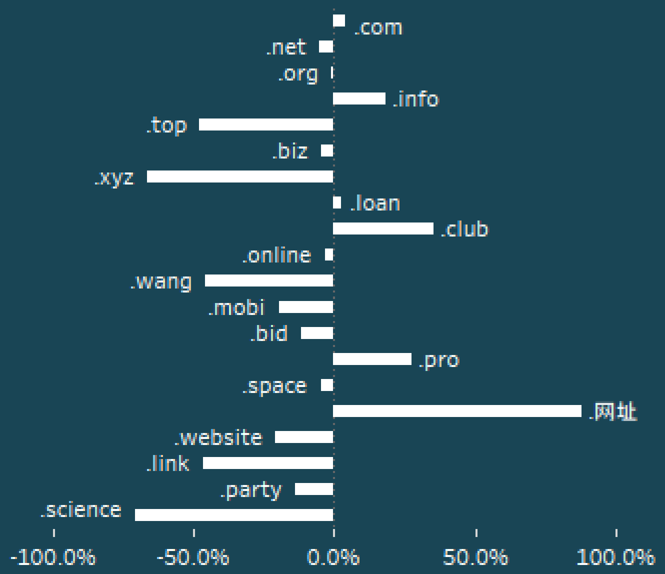
Brand TLDs excluded.

GROWTH | .COM + GROUP MEDIANS
YOY Rolling



Source: CENTR. Excludes brand TLDs and TLDs with less than 500 domains

GTLD GROWTH (YOY) | TOP 20 GTLDS
Top 20 largest gTLDs | APR 2018



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. 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).

Exclusions in data – Some calculations in this report exlcude TLDs with limited or unreliable data. Current exclusions are at least the following: .ag, .cc, .cf, .cn, .ga, .gl, .gq, .gr, .im, .ky, .mg, .ml, .mq, .mr, .mz, .ph, .pw, .st, .tk, .tv, .vg, .vi, .ws, .zm . Other exclusions may exist.

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