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 2019 – Edition 27

Global Market | April 2019

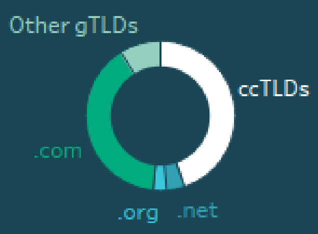
The global TLD market is estimated at around 351 million domains across 1486 recorded TLDs. Median domain growth among these TLDs has decreased to a record low of 3.4% year on year (top 500 median). Between ccTLDs and gTLDs growth rates are similar, with a range from 1.4% for ccTLDs in the Americas to a high of 6.3% for African ccTLDs.

In global market share trends, new gTLDs, which include well over 1000 TLDs, have a little under 10% of the market and show no immediate sign of increasing that. The rest is made up of around 267 ccTLDs with a combined share of 45%. This includes .com, which is the single largest TLD with 40% of all TLD registrations and other larger gTLDs such as .org and .net, both of which have seen declines of around 1% each over the past 3 years.

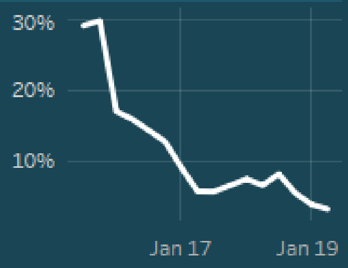
This quarter, Cisco umbrella ranking data has been introduced to the report. The rank shows the most queried TLDs based on passive DNS usage across the Cisco Umbrella global network of more than 100 billion requests per day with 65 million unique active users, in more than 165 countries. It provides an impression on usage and popularity of a TLD and may give additional insight when viewed in conjunction with registration metrics such as domain count.

GLOBAL TLD MARKET | Apr 19
Market (est.): 351.1M domain names (1,486 TLDs)

Market share



Median growth | domains



Regions and types

		TLDs	Domains (million)	Median growth 1Y
ccTLDs	Africa	57	3.4M	6.3%
	Americas	53	14.1M	1.4%
	Asia	98	68.0M	3.5%
	Europe	57	71.8M	1.9%
gTLDs	-	1,218	193.8M	4.1%

Largest TLDs | by total domains

TLD	Country	Cisco rank	Domains	
.com	-	1	139.2M	▲
.de	Germany	19	16.2M	▼
.net	-	2	13.5M	▼
.uk	United Kingdom	20	12.2M	▲
.org	-	3	10.2M	▼
.tw	Taiwan	91	6.0M	▲
.nl	Netherlands	45	5.9M	▲
.ru	Russian Federation	10	5.0M	▼
.info	-	17	4.7M	▼
.br	Brazil	26	4.0M	▲
.eu	European Union	30	3.6M	▼
.fr	France	31	3.4M	▲
.it	Italy	34	3.2M	▲
.au	Australia	72	3.2M	▲
.top	-	84	3.1M	▲

Note: Data in this dashboard excludes the following: TLDs that do not provide regular registration data, have under 5K domains at the latest month, or, have unreliable or unconfirmed data. These rules are applied to growth rates and the list of largest TLDs, but not to the estimate market size figures.

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European ccTLDs

Across all recorded ccTLDs in Europe (57) there are roughly 71 million domain names under management. Growth in the sector has been slowing for years, most likely driven by a general slow down in new domain creations. In recent months, the long term growth trend fell sharply due to a bump in deletions. However this may now be stabilising due to a widening gap between creates and deletes. The median growth at April 2019 was recorded at 1.9% year on year with a high (relative to the other TLDs globally) median renewal rate of 84%.

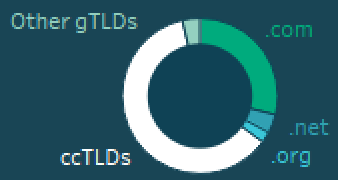
Market share indicators provide a different view on uptake and loyalty to TLDs. Within Europe, the combined share of ccTLD domains is 61%. At country level, local ccTLDs have an average of 54% of the market share (based on domains registered by a registrant within the country). These figures have not changed significantly over the past few years, though other data sources such as Alexa domain ranks offer a different story. The Alexa rank of top 500 domains, which measures web pageviews per million in each country, shows an average of just 26% in favour of the local ccTLD, with signs of decrease. This figure should be treated with care given the small sample (500) of domains per country. CENTR will expand the sample and its analysis in coming editions of this report.

The ccTLDs who had the highest growth (by percentage) over the past 12 months were .pt (Portugal), .ie (Ireland) and .al (Albania).

*Average country market share to the local ccTLD is calculated by analysing all recorded registrations in the country from the local ccTLD, other European ccTLDs and hundreds of gTLDs

EUROPEAN ccTLDs | Apr 19
Market (est.): 71.8M domain names (57 TLDs)

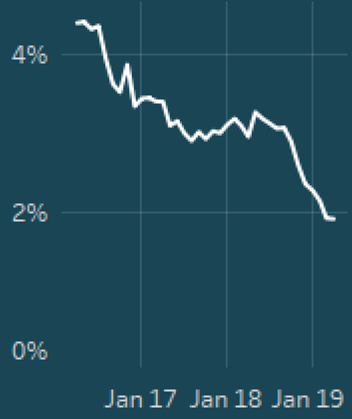
Market share



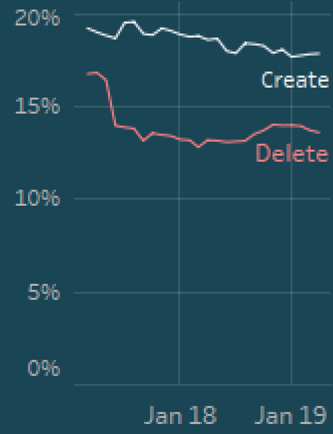
Key Ratios (medians)

Growth (1Y)	2.0%
Renewal rate	81.2%
Create ratio	17.7%
Delete ratio	13.3%

Median growth | total domains



Median create & delete ratio



Top 10

TLD	Country	Cisco rank	Domains	
.de	Germany	19	16.2M	▲
.uk	United Kingdom	20	12.2M	▲
.nl	Netherlands	45	5.9M	▲
.ru	Russian Federation	10	5.0M	▼
.eu	European Union	30	3.6M	▼
.fr	France	31	3.4M	▲
.it	Italy	34	3.2M	▲
.pl	Poland	24	2.6M	▲
.ch	Switzerland	73	2.2M	▲
.es	Spain	54	1.9M	▼

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gTLDs

The combined domains under all recorded gTLDs globally total 194 million, 71% of which are under .com.

Median growth among gTLDs was 4.1% year on year (top 300) - its lowest recorded rate yet. Although the rate is still above the global average, gTLDs will face challenges in the coming months given other registration trends such as a declining create ratio, an increasing delete ratio and a relatively low renewal rate median of 64%. A silver lining to these figures is the median park ratio* (an estimate of the proportion of domains in a TLD which are used for parking or which have errors), which appears to be decreasing*. This may have a positive impact on domain usage and renewal rates.

Of the top 10 largest gTLDs by domain count, all are within the top 100 Cisco ranking list with the exception of .loan which ranks far below the group average, as well as having a relatively high park ratio*.

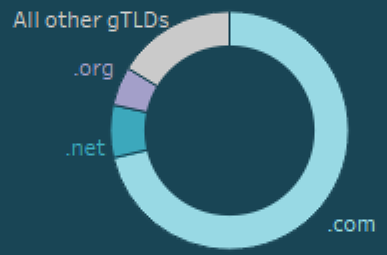
*For more advanced analysis, including views on individual TLDs and comparisons, [see the advanced tools]

Notes: Some figures are sourced from ICANN monthly reports, which have a delay of 3 months. The park ratio is sourced from ntldstats data. See the bottom of the page for more detail.

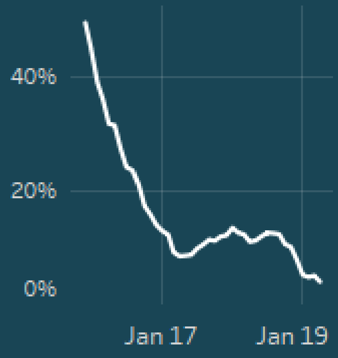
gTLDs| Apr 19
Market (est.): 194M domain names (1,218 TLDs)

	Median
Growth (1 year)	4.1%
Renewal rate	64.1%
Create ratio	34.0%
Delete ratio	27.1%

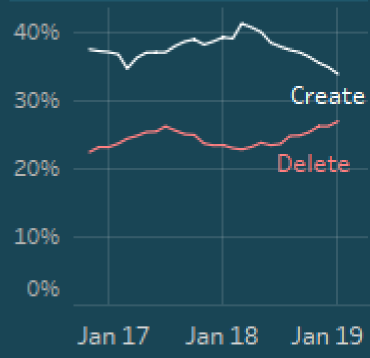
*Renew/add/delete ratios have a lag of 3 months. Figures exlcu..



Median growth | domains
Rolling 1Y| top 300



Creates / deletes
median top 300



Top 10

TLD	Cisco rank	Domains	
.com	1	139.2M	▲
.net	2	13.5M	▼
.org	3	10.2M	▼
.info	17	4.7M	▼
.top	84	3.1M	▲
.xyz	43	2.0M	▲
.biz	38	2.0M	▼
.loan	652	1.7M	▼
.online	59	1.1M	▲
.club	57	1.1M	▲

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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