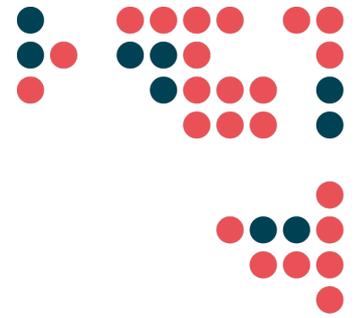




Council of European National
Top-Level Domain Registries

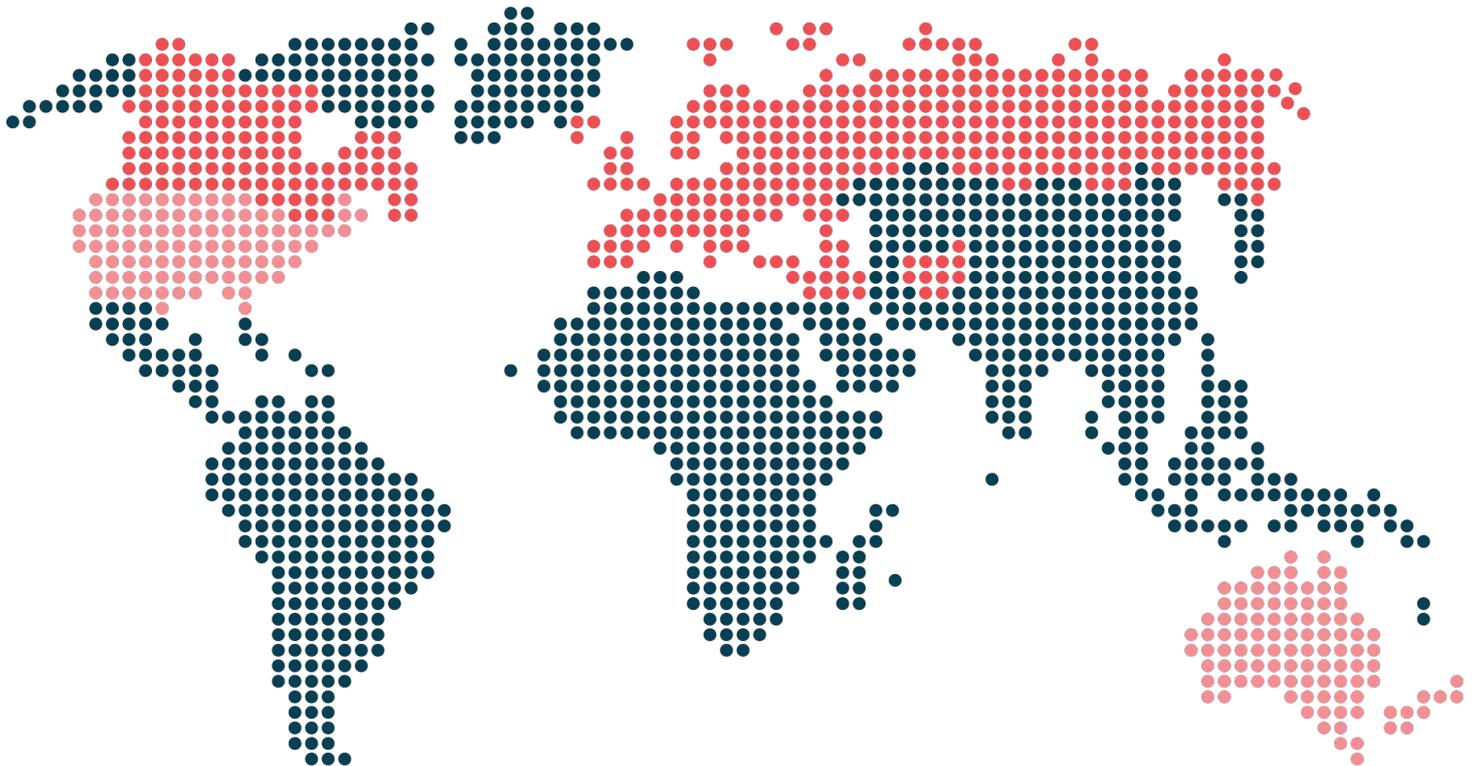


CENTRstats Global TLD Report is CENTR's quarterly publication covering status and trends in global top-level domains with a focus on European ccTLDs (country code top-level domains).

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

Q3 2019 – Edition 29



Global Market

The global TLD market grew an estimated 3.8% YOY to 369 million domains at October 2019. Median growth of the top 300 largest TLDs was recorded at 3.1% YOY, down from 5.4% a year earlier. Whether continued stagnation is due to reduced business confidence, saturated markets, alternative forms of online presence, or even the departure of speculation ('domaining'), the dwindling growth is starting to drive other phenomena. Examples include consolidation among registries and registrars, as well as innovation in business intelligence analysis and tools. The effects of consolidation may even have an effect on TLD market share. For example, within the gTLDs, 95% of domains are held with the top 20 – this has been rising since early 2019. With so much choice among gTLDs, it is entirely possible that consumers, overwhelmed by choice, are shifting to what they know or see advertised.

Slow growth is also driving innovation, for example in Europe where ccTLD operators are developing domain crawlers, standardising registration terminology and further developing monitoring tools to better understand how their domains are being used (or abused).

The largest TLD, .com, maintains around 45% of the global market share with a growth of almost 5% YOY which, in absolute terms, is similar to the combined net growth of all recorded ccTLDs in the same period. .com's growth even overtook that of the top 300 gTLDs early in 2019, however it has recently begun to show signs of a slowdown, with deletions on the rise. Recent news that Verisign (the registry for .com) will soon be able to increase prices will no doubt impact these trends further.

Although several new gTLDs such as .fun, .live, .host and others had surges in domain volume as well as improved global Cisco ranks, median growth in the group (gTLDs from the 2012 ICANN applications) has generally been lacklustre at just 1.8% YOY.

Market mover ccTLDs were .id (Indonesia), .ai (Anguilla), .mx (Mexico) and .ar (Argentina) all with double digit growth and an increased global Cisco rank.



European ccTLDs

Median growth in European ccTLDs was recorded at 2.4% YOY, down from the 3.1% recorded at the same time in 2018. When filtered to the top 20 largest ccTLDs in Europe, the value is just 1.2%. Despite the low growth, other performance indicators such the delete and renewal ratios have been stable. However, the median create ratio, which measures the proportions of new domains entering a TLD, has been increasing marginally over recent months.

Across the continent, country market share for local ccTLDs is 54% on average, based on registrants based in the country. For almost all countries, the local ccTLD is the largest by local registrations, followed generally by .com or .eu. Other ccTLD penetration indicators are domains per 100 capita at 6.1 and sites in the Alexa top 1000 which sits at 30%.

Pricing of European ccTLDs is currently recorded at a median of 12.7 EUR for a new registration and slightly above for a renewal. This contrasts to gTLD pricing where the median buy and renewal price are 24 EUR and 26 EUR respectively*.

Market mover European ccTLDs over the past year were .uk (United Kingdom), .ie (Ireland) and .me (Montenegro) among others. The Irish ccTLD (.ie) has performed particularly well, having recorded high growth and an increased global Cisco rank. It has done this without compromising its renewal ratio which is above the European average, and also by keeping deletions low.

*gTLD pricing source: <https://domainnamestats.com/>

EUROPEAN ccTLDs

Domains under management 70.5M (+0.2% YOY)

Median rates

REGISTRATIONS

Growth YOY	Renewals	Creates	Deletes	Transfers
2.4%	85.2%	17.7%	12.9%	4.2%

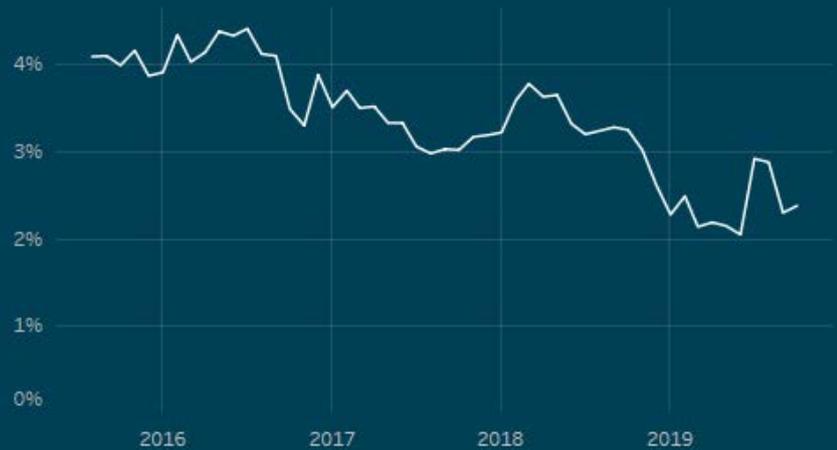
COUNTRY

Market share
54%

PRICING

Registrars
12.6 EUR

MEDIAN GROWTH



LARGEST TLDs

TLD	Cisco rank	Domains	Trend
.de	22	16.3M	▲
.uk	16	13.3M	▲
.nl	47	5.9M	▲
.ru	18	5.0M	▼
.eu	42	3.6M	▼
.fr	30	3.4M	▲
.it	32	3.2M	▲
.pl	40	2.6M	▼
.ch	74	2.2M	▲
.es	65	1.9M	▼

MARKET MOVERS ⓘ

.uk (+11.4%)	▲
.ie (+7.9%)	▲
.me (+4.8%)	▲
.fi (+3.5%)	▲
.hu (+3.1%)	▲
.it (+2.4%)	▲
.be (+1.2%)	▲

View the interactive report



gTLDs

The top 300 gTLDs grew at a median rate of 1.8% YOY which is the lowest rate on record. Driving this is the convergence of the median create (decreasing) and delete (increasing) ratios.

A new trend has been emerging related to the concentration of domains to the largest gTLDs. The *concentration ratio* in the dashboard measures the share of gTLD domains within the top 20 gTLDs. Up until the end of 2018, this ratio had been reducing, however, from early 2019 it took a sharp turn and has been increasing consistently since. This trend suggests the market demand may be shifting toward a smaller group of gTLDs, putting further pressure on those smaller gTLDs trying to get 'shelf space' and attention from registrars.

After a period of above-average growth, deletions in .com are more recently on the rise, putting downward pressure on its growth. Its deletion rate was recorded at 22% (Sep 2019) which is not bad compared to the top 300 gTLD median (26%). However, this is high when compared to other mature TLDs such as the European ccTLDs (13%). The rate has nonetheless been manageable for .com as its creation ratio (a ratio measuring the proportionate volume of new domains entering the zone) has been stable, recording 25% at the same point.

Around a dozen gTLDs of substantial size (over 100K domains) achieved double digit growth while increasing their global Cisco rank. As pricing plays an important role in market demand, it is worth noting that among these gTLDs, the median price in late 2019 was recorded¹ at 16 USD. While similar to registrar pricing of European ccTLDs, it is considerably different to the top 300 largest gTLDs where the median is 27 USD.

*gTLD pricing source: <https://domainnamestats.com/>

gTLDs

Domains under management 206.9M (+3.0% YOY)

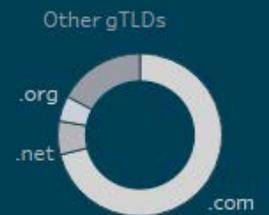
Median rates

GROWTH		REGISTRATIONS			CONCENTRATION
Top 300	Geographic	Renewals	Creates	Deletes	Top 20
1.8%	-3.3%	67.4%	30.2%	28.4%	94.9%

MEDIAN GROWTH Top 300



MARKET SHARE



LARGEST TLDs

TLD	Cisco rank	Domains	Trend
.com	1	147.2M	▲
.net	2	13.8M	▼
.org	4	10.5M	▼
.info	27	5.0M	▼
.top	114	3.5M	▼
.xyz	41	2.6M	▲
.icu	208	2.2M	▲
.biz	49	1.7M	▼
.site	103	1.7M	▲
.club	63	1.7M	▲

MARKET MOVERS

.fun (+244%)	▲
.live (+180%)	▲
.world (+69%)	▲
.app (+60%)	▲
.website (+44%)	▲
.store (+35%)	▲
.asia (+33%)	▲
.vip (+27%)	▲
.work (+26%)	▲
.cloud (+25%)	▲

View the interactive report



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 ntlldstats.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

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.

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