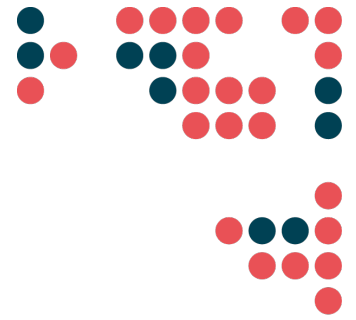**Council of European National Top-Level Domain Registries**

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.
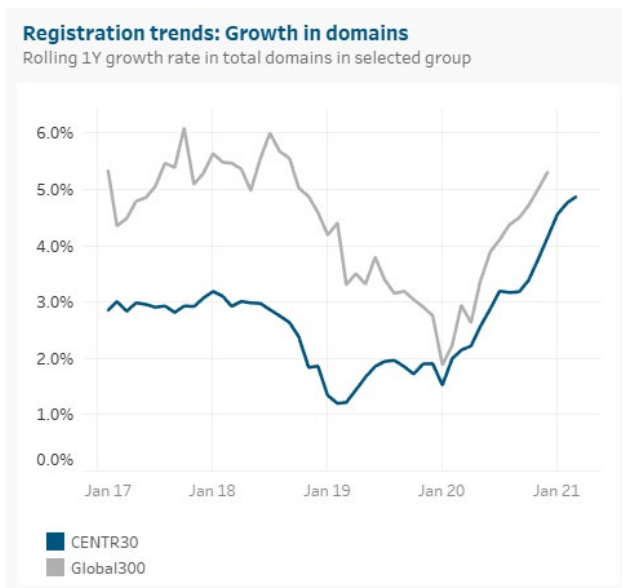
CENTRstats
Global TLD Report

Q1 2021 – Edition 34
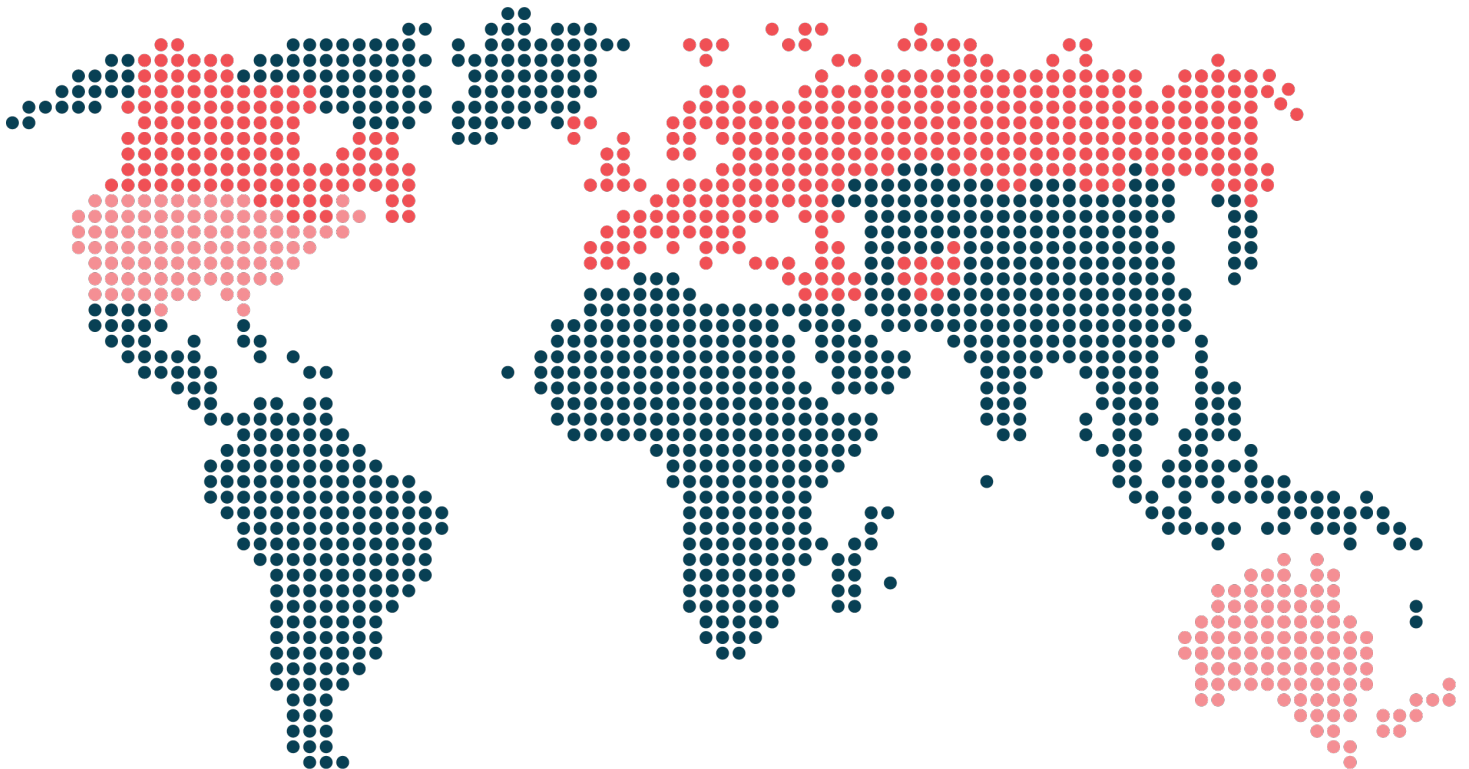
EUROPEAN ccTLDS

Key stats

- The median growth of European country-code domains (ccTLDs) at the end of Q1 2021 was 4.9% YOY.

- Demand in new domain purchases continued to increase in the first quarter of 2021 (based on median domain creation rates) while rates of expirations/deletions remained stable.

- The median buy price of a CENTR member ccTLD domain is 10.0 EUR (inc. tax and any promotions) with the renewal price at 14.0 EUR (inc. tax). The median promotional price recorded in April 2021 was 6.1 EUR (inc. tax)

- 25% of ccTLD domains queried are broken or have no functioning content (e.g. HTTP/DNS errors, timeouts etc). A further 16% lead to a registrar holding (parked) page.

- Across EU countries, the median market share of ccTLDs is stable at 54% based on local registrations and 35% (+2% YOY) based on popular websites.

Registration trends: Growth in domains
Rolling 1Y growth rate in total domains in selected group

Legend: CENTR30, Global300

Registrations and growth drivers

European ccTLD operators will be watching their registrations carefully as the first renewal cycles approach for domains created over 2020. The question they will be asking is the extent to which the high rates of new domain purchases over 2020 will be retained. Typically, the first year renewal of a domain has the highest likelihood for expiration (compared to domains that have already been renewed more than once), however making predictions during this unique period is challenging, particularly given the fast changing policies around the movement of people in Europe.

Over Q1 2021 rates of new domain purchases continued to climb while expiries and deletes remained stable. This resulted in a further increase to the median growth of European ccTLDs (4.9% in the 12 months to March 2021). It is likely however that this trend will face pressure into Q2 as domains purchased at the beginning of the 2020 lockdowns in Europe come up for renewal.

Although we expect a rise in deletes and expirations, the rate may not be severe. There are a few reasons for this. Firstly, widely reported shifts from physical shops to online particularly in consumer goods and services appears to be more entrenched than previously thought. Secondly, the increased demand for domains over 2020 does not appear to be linked to registrar price discounting (an activity which often sees high sales followed by high expiries at renewal).

Something else which will impact the retention of domains is how those domains have been used. In web analysis, CENTR data shows average error and parking rates among ccTLDs to be significantly lower than equivalent rates among the top 100 gTLDs. This will provide a cushion to the eventual slowdown in new domain sales as well as mitigate any sharp increase in deletes.

TLD preference in Europe

For most European countries, the local country code (ccTLD) remains a popular choice. Based on registrations made by local residents, the median market share of EU based ccTLDs is 54% (+1% year on year).

Another measure of TLD preference is to examine the most popular websites by web traffic in each country. It is important to note that using only the largest websites by traffic does create a bias in favour of gTLDs. This is because the most visited websites in most developed economies tend to be multi-national corporations to which gTLDs are often considered a better fit. The median share of local ccTLDs based on top 1000 most visited websites is 35%. This rate is up 2% year on year which should be considered an encouraging trend for ccTLD registries.

Domain usage
A breakdown of how domains among CENTR member ccTLDs are being used.
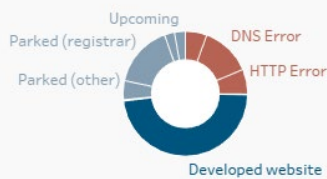
How domains are being used

How domains are being used is crucial to the long term stability and viability of any TLD. The number of broken domains or those with registrar holding (parked) pages should be considered a liability to the registry due to their reduced likelihood of renewal. For long term sustainability, registries should focus their attention to ensure their rates of broken and parked domains are kept low.

Over a sample of European ccTLDs CENTR data shows that 25% of domains queried are broken or have no functioning content (e.g. HTTP/DNS errors, timeouts etc). A further 16% lead to a registrar holding (parked) page. These figures tend to be higher for gTLDs (see gTLD highlights). Note: CENTR will continue to add more analysis of domain usage in upcoming reports.

GLOBAL MARKET

gTLD highlights

- There were roughly 214 million gTLD domains (exclude .brands) registered at the end of 2020 – an increase of 4.4% year on year. Of these domains, 92% are held by the top 10 gTLDs. This ratio has not changed over 2020 suggesting that diversity among gTLDs is not increasing.

- Median growth of the top 300 gTLDs was 7.0% in 2020. This was driven by increasing demand in new registrations (based on median rates in the top 300) throughout the year as well as a slow-down in deletions and expirations particularly in the second half of the year.

- Based on web scans, 43% of gTLD domains queried are broken or have no functioning content (e.g. HTTP/DNS errors, timeouts etc). A further 22% lead to a registrar holding (parked) page. gTLDs (from the top 100) with the lowest rates of broken/errors and parked domains are .tel, .cat, .blog, .berlin and .bayern.

Global trends

At the end of 2020, the global market was estimated at 354 million domains split between ccTLDs (38%) and gTLDs (62%). The median growth of the top 300 largest TLDs globally (Global300) was 5.3% over the year. By group, median growth rates were 3.3% for ccTLDs in the Asia Pacific region (APTLD20), 4.4% for ccTLDs in Europe, 7.0% in the top 300 gTLDs and 0.63% for the top 30 geographic gTLDs.

Global market share by registrations
A breakdown of total domains registered globally by selected groups.
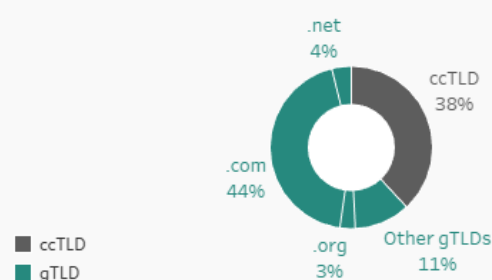
High growth TLDs over 2020 were :

ccTLDs:

- Europe: .ge (Georgia) +15% to 52K, .pt (Portugal) 11% to 1.3M and .ie (Ireland) +10% to 310K
- Outside Europe: .id (Indonesia) +38% to 494K, .lk (Sri Lanka) +27% to 47K and .ir (Iran) +21% to 1.4M.

gTLDs: .bar +415% to 116K, .cam +412% to 41K and .page +314% to 227K.

Geographic-gTLDs: .tokyo +53% to 193K, .miami +37% to 13K and .africa +22% to 27K.

View the interactive report ⬈

SOURCES AND METHODOLOGIES

ccTLD registrations: CENTR member registries (European ccTLDs), Net Knowledge, APTLD. 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.

Pricing

CENTR collects registrar pricing based on the largest registrars of a sample of member ccTLDs. Prices are collected manually every quarter. Prices collected are the buy (including any promotion), renewal and transfer prices (if available) noting the currency and whether tax is included or not.

Market share statistics

Local registrations – to calculate market share based on local registrations, we analyse the total local registrations made in most member countries. For ccTLD registrations in each country, the data comes from CENTR members directly. For gTLDs data is sourced from Zooknic. Zooknic uses sampling techniques to assess the number of gTLD registrations in each country using the country of resident field in the Whois.

Popular websites - CENTR uses the Alexa Ranks for analysis of the most visited domains in each member country. Alexa ranks is a rating service for evaluating websites, based on the frequency of visits/views. More information can be found here https://www.alexa.com/topsites

Domain usage

CENTR scans a sample of member ccTLDs as well as the top 100 gTLDs every month. The crawler classifies domains by their technical status as well as using machine learning techniques to measure domains considered low content websites (eg. registrar holding pages, abandoned pages, under construction, for sale notifications etc). The crawler also measures attribute information domain redirections, MX records, languages and more. The data gives insights to how well developed domains and their usage in a technical sense.

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.

ABOUT CENTR

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