The 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 52 full and 8 associate members – together, they are responsible for over 70% 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

Edition 4_2022

EUROPEAN ccTLDs

Highlights

- European ccTLDs represent an estimated 57% of the European domain name market[1] with the remaining 43% attributed to .com (32%) and other gTLDs (11%).

- There is an average of 15 domains (including ccTLD and gTLDs) per 100 people across European countries.[2]

- Demand[3] for European ccTLDs over 2022 returned to pre-pandemic levels similar to 2018 and 2019.

- Median domain growth in 2022 hit a 10 year low at 1.4% while renewals remained stable at 84.3%.

- The median market share of European ccTLDs is estimated at 53% based on locally registered domains in the country and 42% based on popular websites.[4]

- The median retail price for a European ccTLD increased over 2022 and finished at 10.4 EUR with the same sample of registrars selling .com at 12.7 EUR. Both prices are up 5% year on year.

- DNSSEC adoption remains low for most European ccTLDs with rates of signed domains generally under 10%. There are around 7 ccTLDs that have more than half their zone signed.

- The proportion of European ccTLD domains used for developed web content (active websites) is 46%. Over 2022 the rate of developed ccTLD websites using SSL increased from 66% to 70%.

FOOTNOTES HIGHLIGHTS

The registration ratios mentioned above are based on a sample of CENTR member ccTLDs (< top 30 largest).

Domain usage data is based on scans using the CENTR 'signs of life' domain crawler with over 20 CENTR member ccTLDs and the top 100 gTLDs, classifying domains into technical areas (e.g. DNS error, parked etc). A random sample of 50K domains from each zone is scanned with the crawler.

Registrar prices quoted are inclusive of tax and based on a 1 year initial registration. Data is based on a sample of 160 unique buy prices from the largest registrars of over 30 ccTLDs based mainly in the European region. Data on prices also includes any promotions at the time of recording.

Market in Europe and registration trends

The domain market in Europe is facing the pressures of inflation, energy prices and EU regulation, all of which are pushing at registry financials and operations. While European ccTLDs have for the most part maintained high levels of domain renewals over 2022, growth rates have slowed resulting in a 10 year low of 1.4% (median). Despite the slowdown, ccTLDs are for the most part preserving their internal market shares currently with median rates of 53% based on local registrations and 42% when based on popular website traffic (Google)[5].

The external market pressures are however becoming increasingly felt by the industry more broadly. The average retail price of a European ccTLD domain increased over the course of 2022 to 10.4 EUR (up 5% YOY). While this sort of jump is unlikely to prevent new businesses from buying a ccTLD domain for websites or email, it may have some impact on the more price sensitive domain speculators, in particular in cases where the registry has a less friendly policy toward *domain* tasting (a practice where registries allow registrants to register domains, test them for a short period of time for web traffic and advertisements, and then decide whether they keep them or get a refund). Should retail prices continue to rise over 2023, we may see a further slowdown in growth rates, particularly among registries with higher rates of under-developed domains.

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[1] European market calculated based on 33 countries in the European region. Market size is an estimation based on available data from CENTR member ccTLDs as well as gTLDs registered in their respective countries.

[2] Domains per 100 population is the average value over 33 countries in the European region. To calculate domains per 100 population the sum of all locally registered ccTLDs domains and known gTLD is divided by the population (last updated 2021).

[3] Demand refers to the median 'demand ratio' calculated in CENTR. A demand ratio is calculated as total creates divided by total deletes (or releases) in a given month.

[4] Google Chrome UX Report (crUX) https://developer.chrome.com/docs/crux/ . This dataset records the top million websites in each CENTR member country based on Google data. The prevalence of the local ccTLD is recorded in each country.

5 See footnote above.

Pricing is also changing at the wholesale level. While price hikes are generally uncommon among European ccTLDs, factors such as high inflation, increased costs associated with EU regulation compliance, as well as increasing energy, travel and other supply input costs have resulted in price increases. Data recorded in early 2023 shows a median wholesale price of 6.3 EUR (ex-tax) up from 6.0 EUR a year ago.

As financial pressures continue through 2023, European registries will perhaps more than ever need to ensure they strike the right balance between growth and market share on one side, and their commitment to maintaining a secure and stable zone on the other. While the security of the zone is crucial, apathy toward branding, sales and marketing in any competitive market is not risk free.

European ccTLDs

GROWTH
1.4% YOY
↓ from 6 month av.

RENEWALS
84.3%
↑ from 6 month av.

RETAIL PRICE
10.4 EUR
↑ from 4 quarter av.

Figures are median values of European ccTLD based on the top 30 CENTR member ccTLDs (CENTR30). Retail price data based on largest European registrars of CENTR members

MEDIAN DOMAIN GROWTH
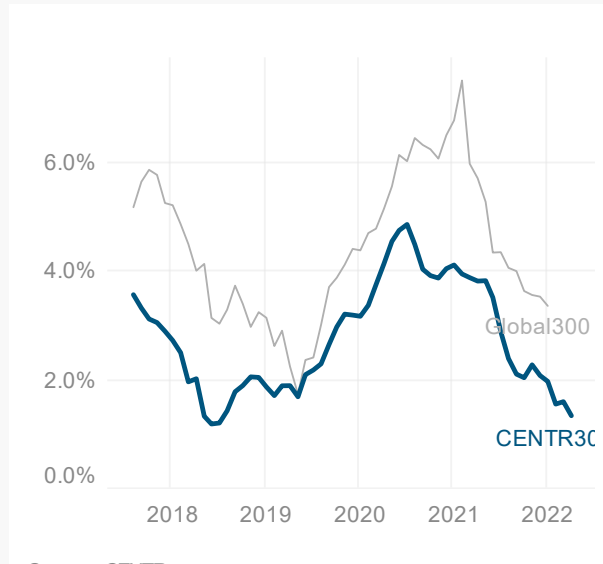
Source: CENTR
Chart shows median year on year growth in total domains based on the top 30 largest CENTR member ccTLDs based mostly in Europe.

View the interactive report ↗

Domain usage

The rate of under-developed domains (with no web content or parked) registered under European ccTLDs is recorded at 54%. This rate contrasts to 69% in .com and 84% in new gTLDs[6] suggesting that European ccTLDs are performing relatively well in terms of actively used web content. While other factors such as the quality of the webpages and their age are factors to this, the data should be considered encouraging given the relationship[7] between a domain's level of web development and its likelihood of renewal.

Of the well-developed ccTLD websites, the rate of sites using https has increased over 2022 from 66% to 70%. Rates of domains with an MX record (an indication of email usage) remained stable at 83%, as did the rate of redirects at 27%.

CLASSIFICATIONS

	ccTLDs	gTLDs
Developed websites	46%	17%
Parked	28%	23%
No web content / errors	26%	61%

Classifications are level 1 technical classifications of domain web pages. Results based on first landing page after any redirects. Parked refers to domains where a registrar holding or similar page was found. No content / Errors include DNS, connection and other related errors.

ATTRIBUTES | developed websites

	ccTLDs	gTLDs
MX record present	83%	66%
Forced HTTPS	70%	71%
Redirected	27%	34%

January 2023

About the CENTR crawler: The CENTR 'signs of life' crawler scans random sample of 50K domains each from ~20 CENTR member ccTLDs aand the top 100 gTLDs. Scans are run on a monthly basis.
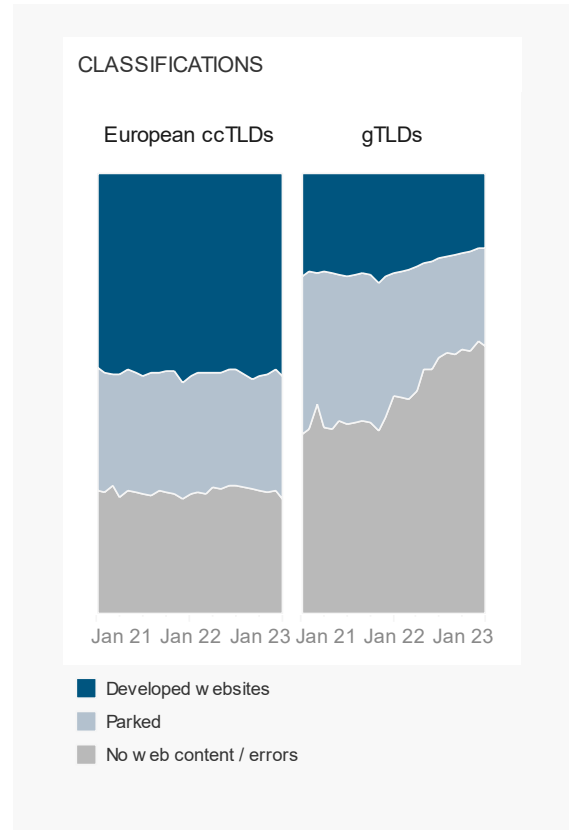
CLASSIFICATIONS

European ccTLDs   gTLDs

Jan 21 Jan 22 Jan 23   Jan 21 Jan 22 Jan 23

■ Developed websites
■ Parked
■ No web content / errors

View the interactive report ↗

GLOBAL MARKET

Data on the global market has a delay to ensure CENTR can collate sufficient data from as many TLDs around the world which have varying availability of data.

The global market is estimated at 360 million domains (Oct 2022) over a sample of 1,456 recorded TLDs. These domains are roughly 46% .com, 37% to ccTLDs and the rest to all other gTLDs. At the 12 months to October 2022, median growth of the top 300 largest TLDs (Global300) was 3.6% - down from the 6 month average. In other groups, rates were 1.6% for ccTLDs in the Asia Pacific region, 2.0% for ccTLDs in Europe and 4.3% in the top 300 gTLDs.

As we approach the 10 year anniversary of the first 'new gTLDs' launching, it is worth reflecting on their development in the market. While there is significantly more choice of gTLDs compared to a decade ago, the expansion has not necessarily translated to any meaningful diversification in TLD adoption. The top 10 largest gTLDs (5 of which are were in existence prior to the new gTLD launches) still hold over 90% of all gTLD registrations. Furthermore, CENTR data indicates that around 61% of gTLD domains either do not have any web content or are parked, suggesting that most gTLD domains are used for brand protection, speculation or otherwise have limited practical use.

The following gTLDs stand out as performing well relative to all gTLDs: .church, .studio, .media, .academy and .agency. In the 12 months to October 2022, domains in these gTLDs had relatively high rates of developed web content whilst maintaining stable renewal rates and growth.

GLOBAL TLD MARKET SHARE

Other gTLDs 14%

ccTLDs 37%

.com 46%

.org 3%

- ccTLD
- gTLD
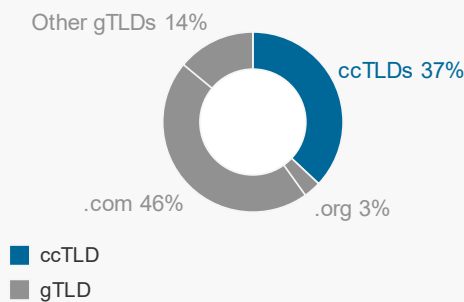
Market share calculated on 360M domains over 1,454 TLDs. Data on some TLDs is not always available or reliable. In these cases, they are either excluded or the data based on previously known values. Data updated October 2022.

MEDIAN DOMAIN GROWTH

Global300

6.0%

4.0%

2.0%

0.0%

2019   2021   2023
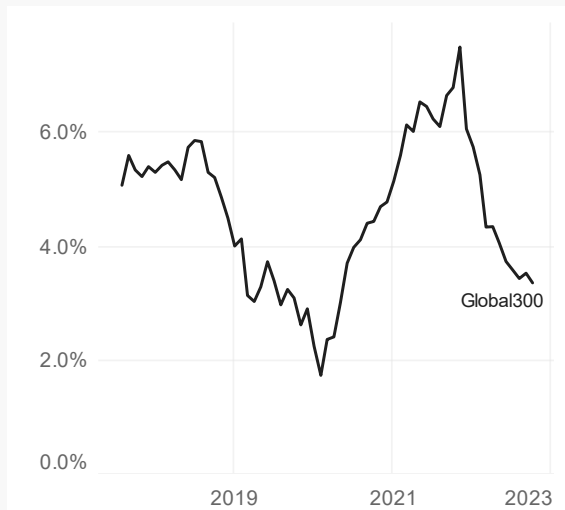
Source: CENTR

Chart shows median year on year growth in total domains based on the top 300 largest TLDs.

View the interactive report

Notes on this report

Reporting on the global market section of this report has a delay of 1 quarter compared to European ccTLD figures. This is due to delays in public gTLD reporting by ICANN.

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.