

DomainWire

Edition 9 – September 2014

Domain Name Stat Report

DomainWire Stat Report is CENTR's quarterly publication covering basic domain name statistics with a focus on European ccTLDs (country code Top Level Domains). A ccTLD (country code top level domain) is a two-letter domain name extension such as .de (Germany), .es (Spain) or .cz (Czech Republic).

CENTR is the European ccTLD association. CENTR is a not-for-profit organisation dedicated to supporting the interest of country code TLD managers. The objectives of CENTR are to promote and participate in the development of high standards and best practices among ccTLD Registries. CENTR has 52 Full members and 9 Associate members who all together represent around 80% of the total number of ccTLD domain name registrations worldwide.



Global Domain Name Status

Top Level Domain: Global Market Shares*



As at August 2014 the total number of domains across all Top Level Domains (TLDs) stood at **282.5 million** (inc. new gTLDs). This represents a growth of roughly 1.6% since May 2014 (4.5 million registrations).

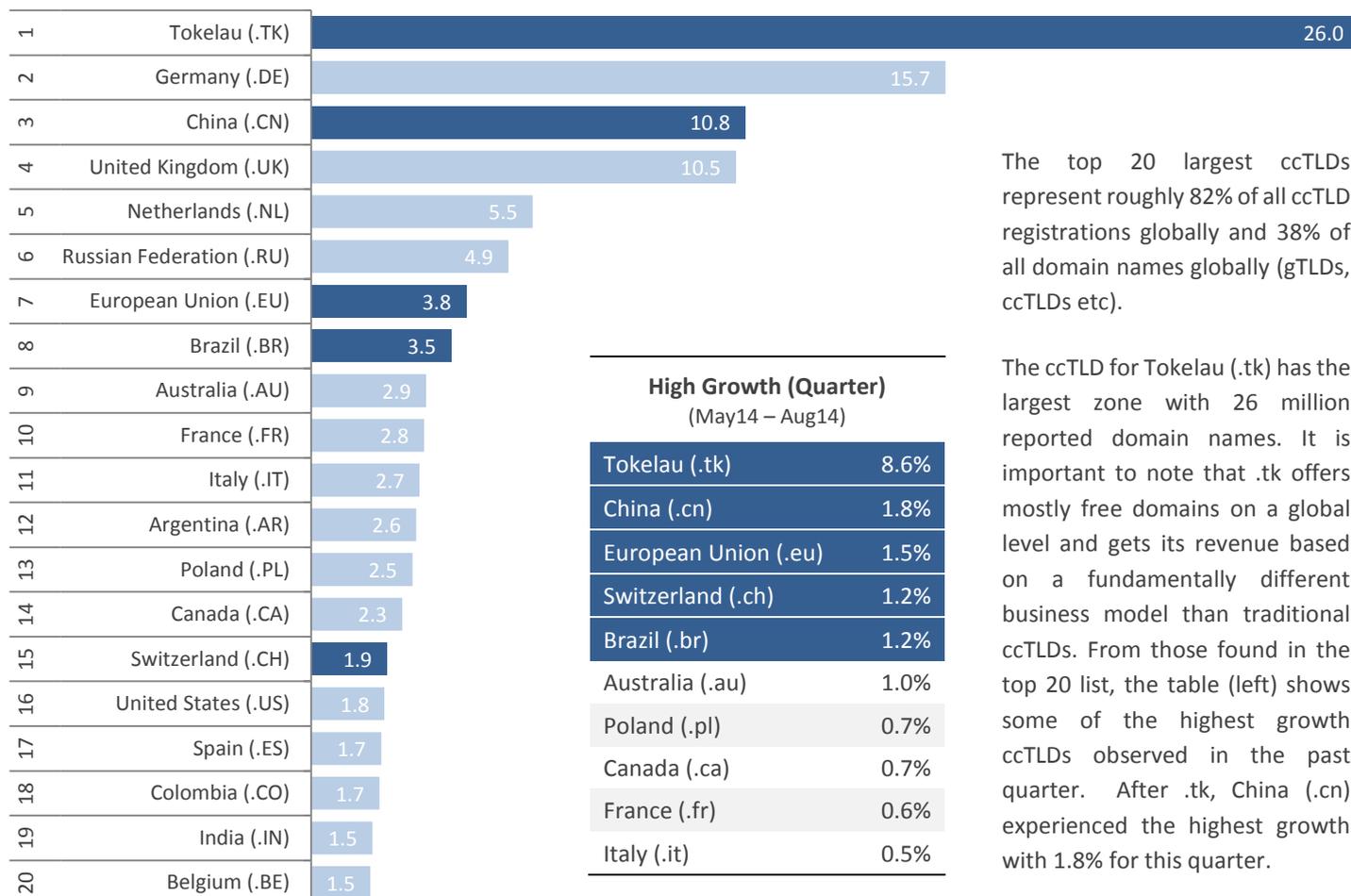
ccTLDs grew at the highest rate for the past 3 months at 1.7% - this compares with 0.3% for legacy gTLDs. The global market share of ccTLDs (as a percentage of all TLD registrations) has been increasing over the past few quarters - it currently stands at 45.8% (see left). As more new gTLDs are introduced, this report will continue to monitor and report on the global domain name market in the new landscape. The current market share of new gTLDs is around 0.7% however it is growing consistently.

	Registrations	Change (3m)
ccTLD	129,388,192	1.7%
ccTLD IDN	1,244,863	2.9%
Legacy gTLD	148,807,739	0.3%
sTLD	1,015,102	-7.9%
New gTLD	2,070,244	139.8%
Total	282,526,140	1.3%

*ccTLDs include ccTLDs and ccTLD IDN.
gTLDs include gTLDs and sTLDs (new gTLDs recorded separately)
Some sTLDs have a delay in data of 4 months.

Source: ZookNIC

Top 20 ccTLDs by Registrations



High Growth (Quarter) (May14 – Aug14)

Tokelau (.tk)	8.6%
China (.cn)	1.8%
European Union (.eu)	1.5%
Switzerland (.ch)	1.2%
Brazil (.br)	1.2%
Australia (.au)	1.0%
Poland (.pl)	0.7%
Canada (.ca)	0.7%
France (.fr)	0.6%
Italy (.it)	0.5%

The top 20 largest ccTLDs represent roughly 82% of all ccTLD registrations globally and 38% of all domain names globally (gTLDs, ccTLDs etc).

The ccTLD for Tokelau (.tk) has the largest zone with 26 million reported domain names. It is important to note that .tk offers mostly free domains on a global level and gets its revenue based on a fundamentally different business model than traditional ccTLDs. From those found in the top 20 list, the table (left) shows some of the highest growth ccTLDs observed in the past quarter. After .tk, China (.cn) experienced the highest growth with 1.8% for this quarter.

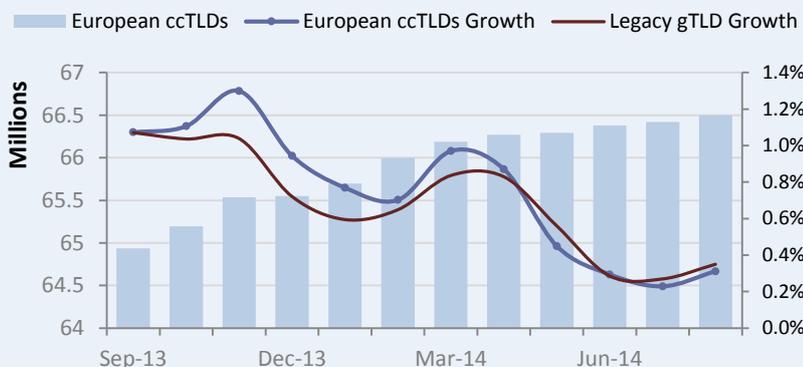
European ccTLDs Status update

European ccTLDs closed August 2014 with 66.5 million registrations - a net growth of 0.3% over the past 3 months. The chart (right) shows growth rates (3m averages) for both European ccTLDs and legacy gTLDs over the past 12 months. It suggests a continued trend downward of both TLD types with a stabilisation observed since July. Over the past 12 months, European ccTLDs grew 2.8% as compared to 2.6% among legacy gTLDs (note: the gTLD registration base is larger – see previous page). The largest contribution to the 3 month growth of European ccTLDs in terms of total domains came from .eu (European Union).

On a sample of 34 European ccTLDs, the median rate of 'new domains' added to a ccTLD zone was 23% for 2013 and a rate of 81% for renewals. In terms of DNSSEC, roughly 68% of all ccTLDs within the European region are signed (32 ccTLDs) with several more in the planning stages.

European ccTLDs At a Glance

Total ccTLD registrations in Europe	66,499,265
Growth – Quarter/1 year	0.3%/2.8%
Average Renewal Rate (2013)	80.6%
Highest quarter growth (%)	.by (Belarus) 4.5%
Largest Zone	.de (Germany) 15.7 million
DNSSEC Status	32 signed zones (68%)

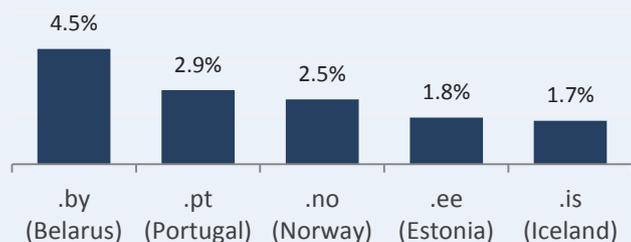


Source: CENTR, Hosterstats, ICANN (DNSSEC stats)

To smooth the growth line, 3 month rates are used rather than 1 month
Legacy gTLDs do not include new gTLDs

European ccTLDs – Domain name growth

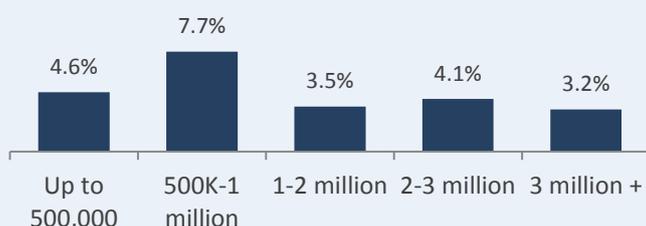
Highest Quartely Growth - (May14 - Aug14)



The chart (left) shows the top 5 highest growth European ccTLDs over the quarter. .by (Belarus) achieved the highest net growth in percentage terms at 4.5%. After this high growth ccTLDs for the 3 months include .pt (Portugal), .no (Norway), .ee (Estonia) and .is (Iceland).

.pt has also recorded the highest net growth over the 12 previous months at 14.7%. Other high growth European ccTLDs over this period were .is (10.8%), .ee (9.3%) and .ro (8.7%).

Median 1 year Growth by zone size (Aug13 - Aug14)



The chart (left) shows the 12 month median growth rates for European ccTLDs split up according to registry zone size. The highest growth category was ccTLDs which manage 500K-1 million domains (7.7% median).

It is important to note that higher percentage growth is more easily attained when the base number is smaller which is why the category of 2-3 million might be considered a high performer as it has consistently high relative growth for its larger zone sizes. ccTLDs in this category include .fr, .it and .pl.

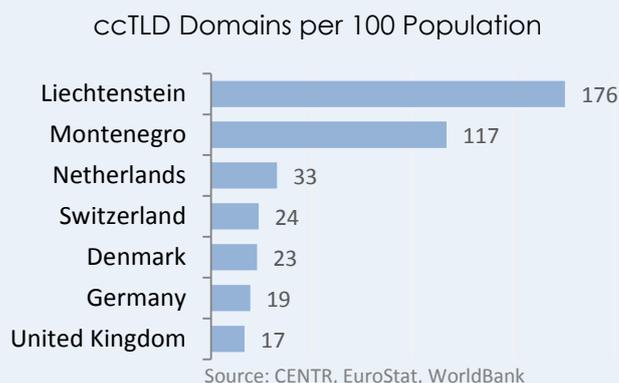
Note: Number of observations differ between categories.

European ccTLDs – Domain name penetration

Measuring the number of domains per capita can provide some insight to the relevance of domains within a country. The chart (right) shows the number of ccTLD domains per 100 population of each country. These numbers do not distinguish between domains registered under the local ccTLD from within and outside the country.

With a small population of 37,000, Liechtenstein retains the top position with 176 ccTLD domain names per 100 population.

Note: Montenegro (.ME) has a strong focus on markets outside its own country.



Registrar Security on Authentication

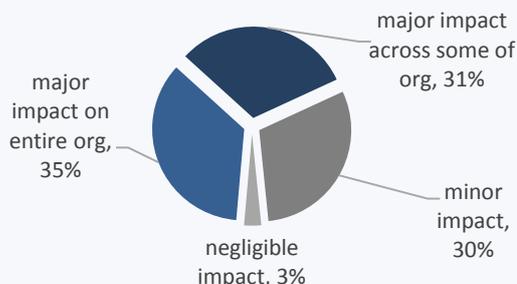
Finding the balance between robust security and making business processes simple for Registries and Registrars respectively can be a challenge. Recently CENTR asked over 100 Registrars web hosting companies, ISPs and other IT related organisations their thoughts on some specific areas of security management. The aim of the survey was to gather views on how to increase the security level access to their web portals as well as to evaluate the need for a greater emphasis on 2-factor authentication and other security features.

The survey found that 90% of respondents are not aware of any situation where leaked credentials have led to an attacker modifying DNS or related data. This left 10% who have experienced this type of incident. Almost 70% of all respondents stated an attack of this kind would be a major impact on either the entire or part of the organisation.

With regard to the type of authentication methods used the most common is a simple user ID and password. Other methods such as IP address restrictions and hardware tokens are also popular. The 3 most secure methods of authentication considered by respondents are a Yubikey RSA SecureID and a time-based one time password (RFC 6238).

The survey found that if 2-factor authentication was introduced across all registries, 53% of respondents would use it across all those registries. 40% stated they would use it for 'some' of the Registries. Only 7% would not use it at all.

Impact of attack where credentials exposed



Authentication Method Ratings

Most Secure:	Hardware token, Yubikey
Most Usable:	User ID and PW
Preferred:	User ID and PW
Worst:	Smartphone app &/or HTML 5 app

Note: The full report from this survey is available to CENTR members and those organisations that took the survey.

SOURCES

All data in this report is sourced from the following: CENTR, ZookNic (<http://www.zooknic.com/>) LACTLD, www.hosterstats.com. CENTR would like to thank the support of other Regional Organisations LACTLD, APTLD and AFTLD for their continued support in the development of statistical reporting for the global ccTLD community. When sourcing CENTR, data is taken from direct communication and responses received from CENTR members (ccTLD registry operators) via CENTR surveys and ongoing data collection.

When the term 'European ccTLDs definition is used within this report, it refers to a set of European ccTLDs which are full members of CENTR. In most cases the aggregated values of this group are estimated to represent at least 95% of domain registrations from ccTLDs based in Europe.

GLOSSARY OF TERMS

ccTLD – a Country Code Top Level Domain (ccTLD) is a top level domain used and reserved for a country or dependent territory. Examples include .uk for the United Kingdom or .de for Germany. Each country appoints a manager of its ccTLD and sets the rules for allocating domains.

gTLD – a Generic Top Level Domain (gTLD) is a top level domain that is open to registrants worldwide in contrast to a Country Code Top Level Domain that are often restricted to registrants located in a particular country. The more popular gTLDs are .com, .org and .net

ccTLD IDN – an IDN is a domain names that includes characters used in the local representation of languages that are not written with the twenty-six letters of the basic Latin alphabet "a-z". An IDN can contain Latin letters with diacritical marks, as required by many European languages, or may consist of characters from non-Latin scripts such as Arabic or Chinese. A ccTLD IDN is an IDN at the top level – eg. the ccTLD IDN for the Russian Federation is .РФ which is the Cyrillic script version of .RF (Russian Federation)

sTLD – a Sponsored Top Level Domain (sTLD) is another form of a gTLD overseen by ICANN. An example of a sTLD is .cat for the Catalonia region.

Registrant – The individual or organisation that registers a specific domain name. They hold the right to use that domain name for a specified period of time (often one year however multi-year registrations are increasingly popular).

Registry - An internet domain name registry receives domain name information into a centralised database and transmits the information in internet zone files on the internet so that domain names can be found by users around the world via the worldwide web and email.

ABOUT CENTR

CENTR is an association of Internet Country Code Top Level Domain Registries such as .uk in the United Kingdom and .es in Spain. Full Membership is open to organisations, corporate bodies or individuals that operate a country code top level domain registry. The project that became CENTR was formed in March 1998 and was informally funded by participant registries. In 1999, it was legally established as a not-for-profit company in the UK. Since 2006, CENTR is registered as a non-for-profit organisation based in Brussels, Belgium. CENTR activities are funded by membership fees, and performed by a secretariat based in Brussels, Belgium.

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

