Council of European National Top-Level Domain Registries

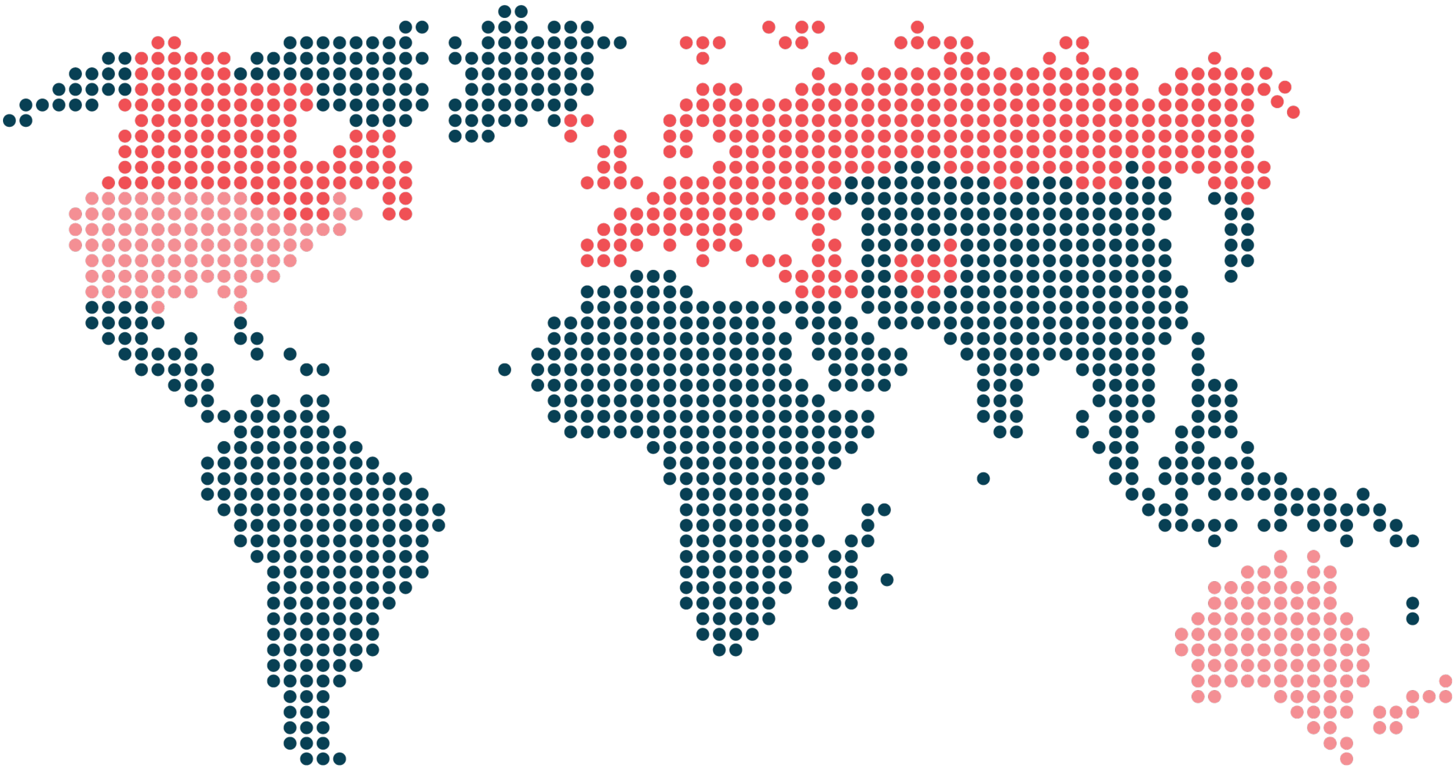
CENTRstats Global TLD Report is CENTR's quarterly publication covering status and trends in global top-level domains with a focus on European ccTLDs (country code top-level domains).

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

Q4 2019 – Edition 30



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Global Market | January 2020

The global TLD market grew an estimated 3.0% YOY to 372 million domains at January 2020, driven mostly from gains in .com, .icu, .site and .uk. An interesting metric to get a better sense of the growth is median TLD growth. Across the top 300 largest TLDs, the median year-on-year growth rate was 2.6% at January 2020, down from 4.5% a year earlier. To some degree the slow-down in growth is a natural effect of an increasing domain base across hundreds of new gTLDs. However, as previous reports consistently show, the overall domain market is in slow-down across most groups and regions, with some TLDs already facing contraction.

Median rates across regions and groups range from 1.3% for ccTLDs in Asia to almost 9% among African ccTLDs (although the sample and base of domains is much smaller). Some geographic gTLDs are facing declining numbers, with the median rate recorded at 0% (Jan 2020).

One of the most mature domain markets is Europe. Although the region has slowed considerably in growth over the past decade, ccTLDs in the region have generally maintained a steady growth over 2019, with rates consistently above 1% throughout the year. In the most recent months, there has even been a small trend up.

Market mover gTLDs over the past 12 months in absolute terms were .com, .site and .wang, while in the ccTLD group, the highest growth has been within .uk, .co and .ir. An interesting gTLD to follow, which became available for general registration in early 2019, is .dev. In less than a year .dev has grown to around 180K registrations. .dev is being marketed for *developers* and has an average buy price of 10 USD[1], which is not far from the average prices of mature TLDs.

1 https://domainnamestats.com/

Global Market | Domains under management (est.)

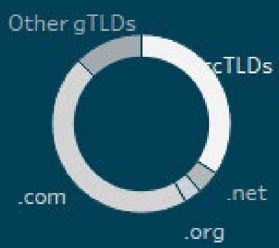
372M (+3.0% YOY)

Median YOY growth rates

ALL	gTLDS		ccTLDS			
Global 300	Top 300	Geographic	Africa	Americas	Asia	Europe
2.6%	2.4%	0.0%	8.9%	3.0%	1.3%	1.6%

MEDIAN GROWTH Global 300

MARKET SHARE



TOP 10 TLDs | by Domains

		Cisco rank	Domains	Growth YOY %
1	.com	1	148,817,384	4.8%
2	.de	21	16,324,963	0.7%
3	.net	2	13,736,665	-3.9%
4	.uk	17	13,046,598	8.7%
5	.org	4	10,453,561	-2.0%
6	.nl	40	5,888,112	1.0%
7	.ru	16	4,952,513	-1.3%
8	.info	30	4,941,704	-10.8%
9	.icu	226	4,923,266	1599.5%
10	.br	80	4,080,058	2.8%

*Table exldudes brand TLDs. Cisco ranks exclude subdomains

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European ccTLDs

Across Europe, domains under management total just over 70 million (37 European-based ccTLDs) which is estimated at being 53% of all registrations in the region. In most countries, the local ccTLD is the largest, followed by .com and often .eu (in EU member states).

The median growth of European ccTLDs was recorded at 1.6% at January 2020, an increase of 0.5% from its low in April 2019. The increase in growth rates appears to be driven by subtle increases in creates and reductions in deletes over 2019. CENTR expects this upward momentum to be short-lived as the gap between median create and delete ratios (which are leading indicators) may be converging, which will put a negative pressure on net growth.

Over 2019, data shows that an increasing number of domains have been transferred between registrars, which may be linked to ongoing consolidation in their businesses. The renewal rates are generally very strong among European ccTLDs with a median of 82%.

CENTR records retail pricing (prices advertised by registrars) over a sample of the largest registrars of a group of 27 ccTLDs in Europe. For someone registering a domain for a website, to protect their brand, use email or for another purpose, price may not be a significant factor, however across a market it can subtly influence the choice businesses and individuals have between TLDs. The median buy price for a registration across European ccTLDs is 13.6 EUR (including tax / 1 year). Many registrars also offer promotional prices, which at January were recorded at a median rate of 6.0 EUR. CENTR will continue to track these prices on a quarterly basis.

European ccTLDs | Domains under management
72M (+2.0% YOY)

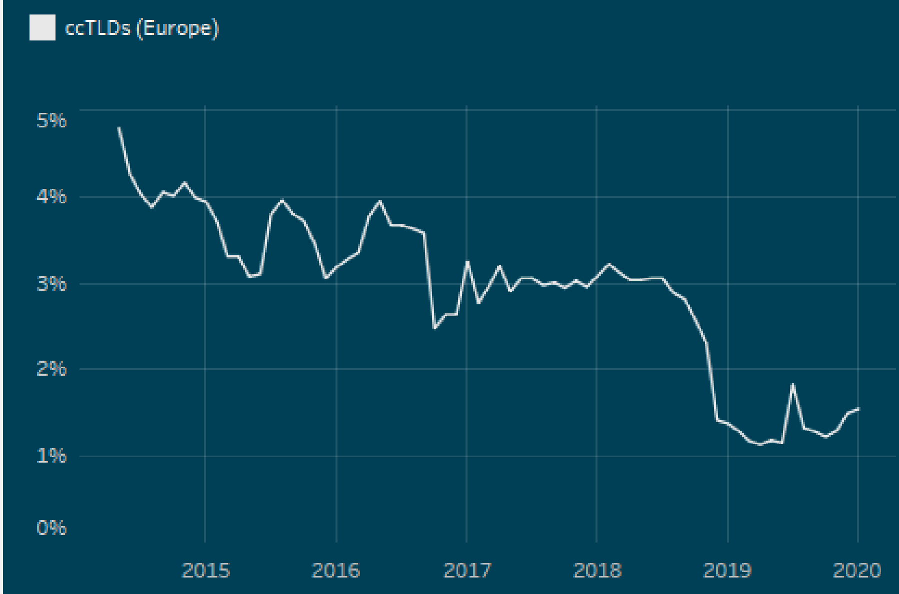
Registration medians

Growth YOY	Renew	Creates	Deletes	Transfers	Market share
1.6%	82%	18%	13%	4%	53%

Retail price medians

Buy	Buy (promotion)	Transfer
13.6 EUR ↓	6.0 EUR ↓	12.1 EUR ↓

Growth (YOY) Median



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gTLDs

The combined domains under all recorded gTLDs total 214 million, with a growth of 4.9% over the past 12 months. The top 300 largest gTLDs' median growth was 2.4%, a rate which was largely stable over the course of 2019. Geographic gTLDs have followed a very similar curve to the top 300, albeit several percentage points lower. This reduced growth among the geographic gTLDs pushed many into contraction, with 21 out of the top 30 reporting a decline in total domains. The median growth of geographic gTLDs has however showed some positive signs, moving from a low of -3% (September 2019) to 0% YOY (January 2020).

After many months of increasing growth rates, the largest TLD, .com has begun to level off and completed 2019 at 4.6% YOY - a figure still well above the top 300 median and most other mature markets. Driving this stabilisation has been a noticeable increase in its delete ratio over the course of the year. A result of this increase in deletions (or non-renewed domains) has been a downward pressure on the .com renewal rate which has dropped from a high of 75% at the start of the year to finish on 71% by the end.

95% of gTLD domains are held with the top 20 largest TLDs. This ratio has been rising since the beginning of 2019, which confirms the continued concentration into an ever-smaller number of gTLDs. CENTR continues to track this phenomenon and in particular how it relates to technical analyse of how domains among different gTLDs are being used.

gTLDs | Domains under management

214M (+4.9% YOY)

Median rates

GROWTH		REGISTRATIONS			CONCENTRATION
Top 300	Geographic	Renewals	Creates	Deletes	Top 20
2.4%	0.0%	65.3%	30.4%	27.0%	95.0%

MEDIAN Growth (YOY)

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 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 .PФ, 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