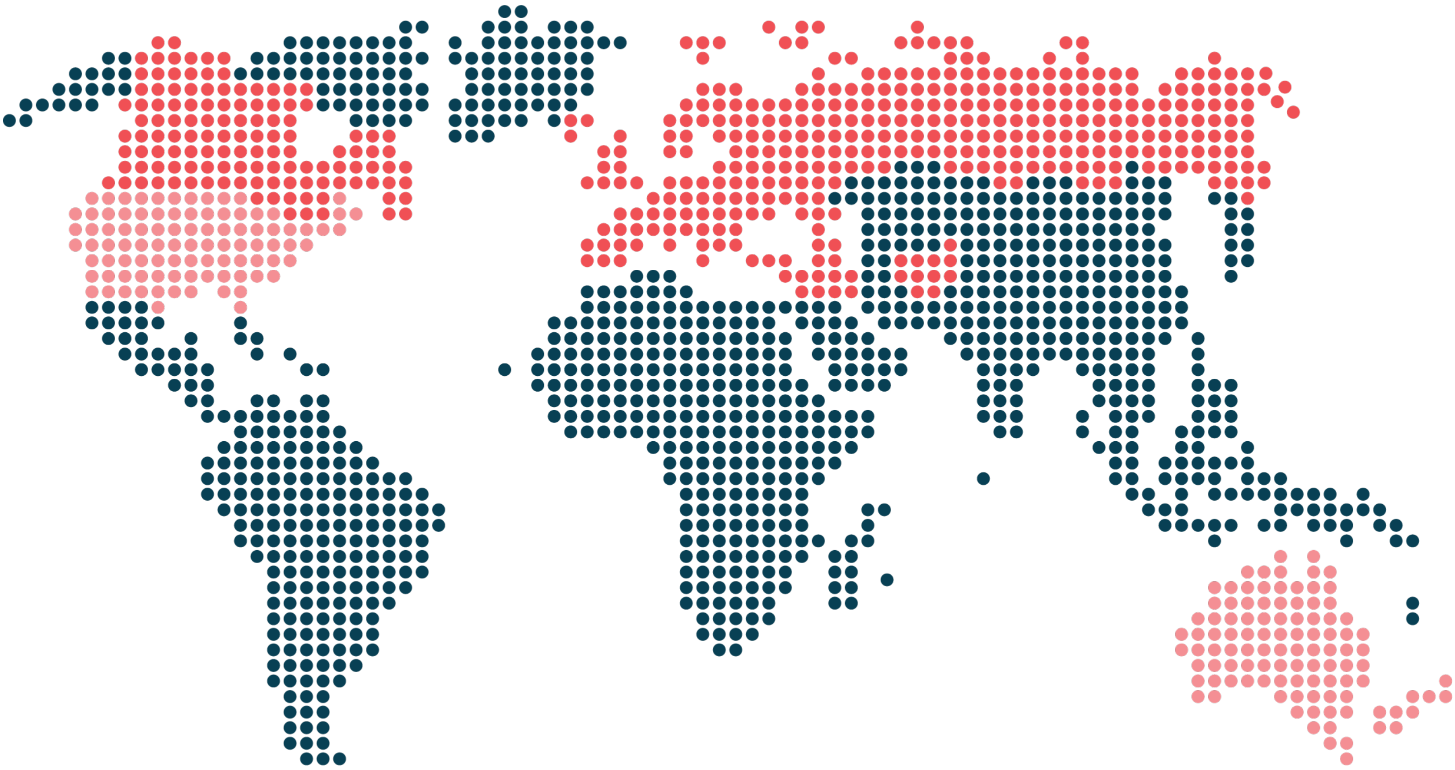
CENTRstats Global TLD Report is CENTR's quarterly publication covering status and trends in global top-level domains with a focus on European ccTLDs (country code top-level domains).

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 53 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 2021 – Edition 36***

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## EUROPEAN ccTLDS

### Key stats

- Median domain growth in European ccTLDs was 3.7% YOY (Oct 2021), down from the 6 month average and showing signs of stabilisation.
- After declines in new domain purchases over Q2, demand picked up again in Q3 although still below the rates of 2020 during the same period. Deletes/non-renewals have been stable and seen a small decline over Q3 2021.
- Based on Alexa ranks[1], .com makes up around 43% of popular domains in CENTR member countries. The rest is made up of European ccTLDs[2] (33%), non-member ccTLDs (14%) and all other gTLDs (11%).
- While the median retail price for a ccTLD has been stable over 2021 (10.0 EUR for a 12 month registration[3], Oct 2021), promotions have become more aggressive with a median of 4.5 EUR in October 2021, down from 6.7 EUR at the beginning of the year.
- 28% of ccTLD domains queried are broken or have no functioning content (e.g. HTTP/DNS errors, timeouts etc). A further 27% lead to parked, abandoned, blocked or other low content pages. These rates have been stable over Q3 2021.

Domain registrations

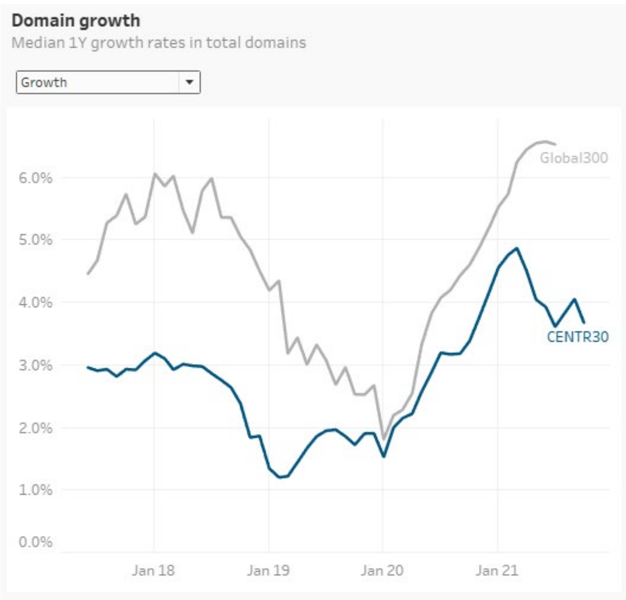
| GROWTH | RENEWALS | RETAIL PRICE |
|---|---|---|
| 3.7% YOY | 85.4% | 10.0 EUR |
| ↓ from 6 month av. | ↑ from 6 month av. | ↓ from 4 quarter av. |

Country Market share

| | ccTLDs | 1Y |
|---|---|---|
| Local registrations | 53% | +1.0% |
| Alexa ranked websites | 34% | +1.5% |
| Domains per 100 population | 6.2 | |

Market share figure are medians based on around 30 CENTR member countries. They show the market share (or penetration) of the local ccTLD in its respective country.


Source: CENTR. Domain usage data from CENTR 'Signs of Life' domain crawler (updated October 2021). * *Developed* refers to websites that when visited did not have any sifgnificant error or classifed in the *parked* category.



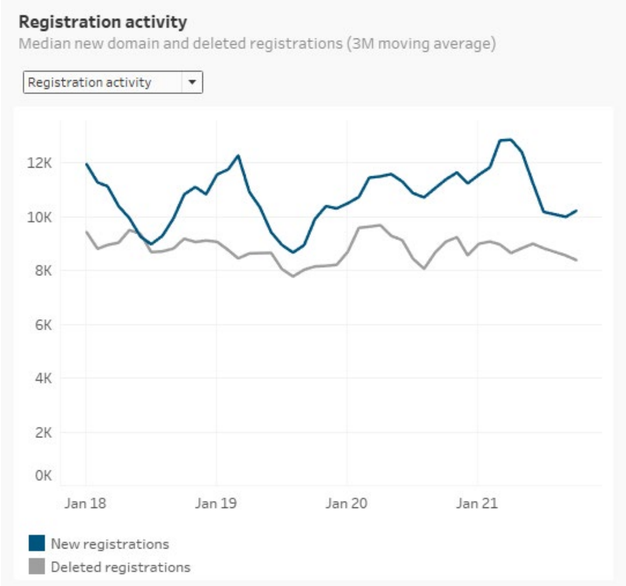

### Market in Europe and registration trends

The market in Europe[4] is estimated at around 116 million registered domains of which 69 million are ccTLDs (+3% YOY), 35 million .com (+3% YOY) and 12 million all other gTLDs (+4% YOY).

While .com maintains a strong market presence in Europe, all other gTLDs remain under-represented holding just 11% in the European region compared to 16% globally. Trends in these market shares show that over the past 3 years, .com has increased slightly at the expense of ccTLDs while all other gTLDs have remained flat.

1 Alexa ranks are based on the top 1000 most popular websites recorded over CENTR member countries (mostly European). Note that this dataset will likely cease sometime in 2022.
2 European ccTLDs based on a sample of CENTR member ccTLDs mostly in the European region.
3 Buy prices in this context are the prices in which registrars sell domains for. They price quoted in this report include any promotions advertised, are for a 1 year registration periods and include tax. Prices are captured from CENTR member registries. To get an accurate picture of the most common prices, only the largest registrars (by domain volume) of the member ccTLDs are used in the analysis.
4 Market is calculated as all locally registered ccTLD and gTLD domains in 34 CENTR member countries in the European region.

Through most of the Covid pandemic, new domain registration demand in European ccTLDs has reached historic highs. This demand has, since mid-2021, dropped back to rates similar to pre-pandemic years. Deletions and non-renewals have remained stable over the year and more recently shown a small downward trend.




**Retail pricing**

The median retail (registrar) price of a European ccTLD is 10.0 EUR[5] (Oct 2021) – slightly down from the previous quarter and below the equivalent .com price of 12.0 EUR from the same registrars.

Median promotional prices recorded in October 2021 were 4.5 EUR for European ccTLDs and 7.4 EUR for .com.

Over the course of 2021, registrars have been discounting domains more frequently and more heavily - both for European ccTLDs and .com. The heavy discounting may suggest that registrars are eager to retain the strong uptake in new domain demand they saw over 2020. Although this may help in the short term, it is not yet clear whether it will hold in the long term. When the price of a domain decreases, it is more likely to increase speculation, or even abuse, rather than have a positive impact on the creation of websites and use of email (uses which are more often linked to longevity in domain renewals).

**Domain usage**

How domains are being used in the market is likely to become one of the most important metrics in registry business analysis in the coming years. European ccTLDs and other long-established TLDs such as .com and .org continue to face market pressures (new gTLDs, social media and other forms of web navigation where domains are less visible/required), an increased regulatory environment as well as reduced speculation in domains (e.g. domains being bought and sold on the secondary market). There is a balance to strike between good registry security, adherence to regulatory requirements and maintaining an attractive product with low barriers to entry.

At October 2021, around 28% of domains held in European ccTLDs have errors resulting in a failure to resolve (e.g. DNS, connection or other errors) with a further 27% of domains considered to be *parked* (i.e. display registrar holding pages or other under-developed content)[6]. These figures compare to 45% and 32% respectively among the top 100 gTLDs globally. While the results show that ccTLDs are relatively well used for websites, it is also important to understand other uses for domain names such as email, brand protection (i.e. registering a domain simply to prevent others doing so), redirection or other reasons.

On email, data on European ccTLDs shows that around 81% of *developed* domains (i.e. domains that did not have significant errors or were parked) have an MX record – the protocol required for email usage. While the presence of an MX record does not in itself mean that email is being used, it does give some indication of its likelihood, particularly when contrasted to the same rate in developed gTLDs (60%) or even ccTLD *parked* domains (64%).

5 Pricing figures based on a sample of the largest registrars of CENTR members. The buy price as well as any renewal and promotion prices advertised are collected from around 37 unique ccTLD strings over 165 registrar websites each quarter. Prices stated include tax and are based on a 1 year registration period.

6 Data on domain usage based on ccTLDs sampled from around 20 European ccTLDs and the top 100 gTLDs, scanned monthly with the CENTR signs-of-life domain crawler.

## GLOBAL MARKET

### Global trends

Since early in 2020, the global domain name market has seen some of the highest activity levels and growth rates since the introduction of new gTLDs some 5 to 6 years ago. The median growth of the top 300 largest TLDs (Global300) was recorded at 6.5% in the 12 months to July 2021. This rate may however not climb higher as more recent data from the European market (see above in report) has shown.

By group, growth rates in the 12 months to July 2021 were 4.7% for ccTLDs in the Asia Pacific region (APTLD20), 3.6% for ccTLDs in Europe and 9.2% in the top 300 gTLDs. Growth in geographic gTLDs (city and region names) was generally flat in the first half of 2021, with a median growth of 0.3% in the 12 months to July 2021 (Geo30).

gTLDs remain heavily concentrated in a small group (92% within the top 10) and show no sign of change. New gTLDs have yet to make any significant dent in the overall gTLD market share, and gTLD diversification has actually declined, becoming even more concentrated to the largest gTLD, .com. Over the past 3 years the share of .com within all gTLDs moved from 70% at the start of 2018 to 74% in July 2021.

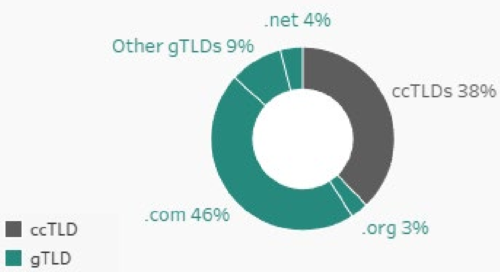
**GROWTH**

**6.5% YOY**

Median Global300

**Global Market share**

Breakdown of total registered domains by TLD/group




Market share based on 352M domains over 1,455 TLDs. Total domains data on some ccTLDs is not always available. In these cases, they are either excluded or the data may be based on previously known values. Data updated July 2021

**Growth in domains | by TLD group**

Median year-on-year growth (rolling) in total domains


Based on the top 100 largest gTLDs, data in December 2021 shows that 45% of domains have errors and do no resolve (e.g. connection errors, DNS and HTTP errors) while a further 32% are either parked, abandoned or contain blank pages. This leaves around 24% which have a functioning / developed website. Of these sites, 60% have an MX record, 65% have an SSL certificate and 31% were the result of a redirect.

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## 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 open data.

**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, CENTR analyses the total local registrations made in most member countries. For ccTLD registrations in each country, the data comes from CENTR members directly. gTLD 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 (e.g. 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 into the development and usage of domains 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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For any questions on this report, please contact patrick@centr.org

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