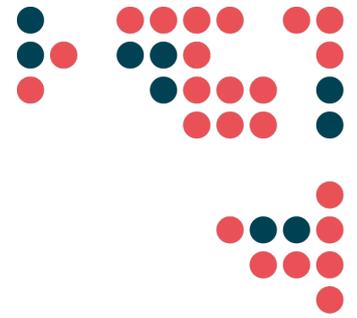**Council of European National Top-Level Domain Registries**

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 52 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

Edition 2/2022
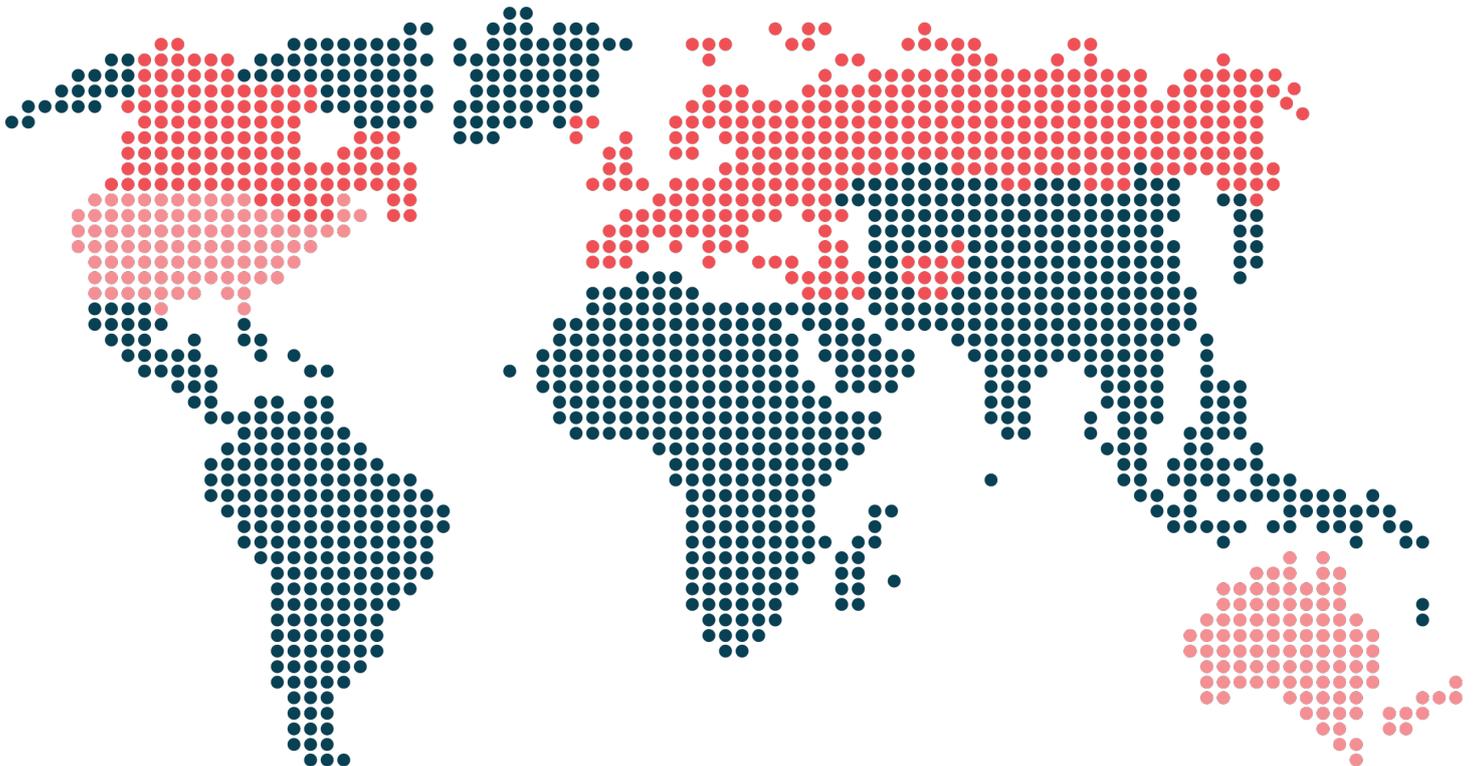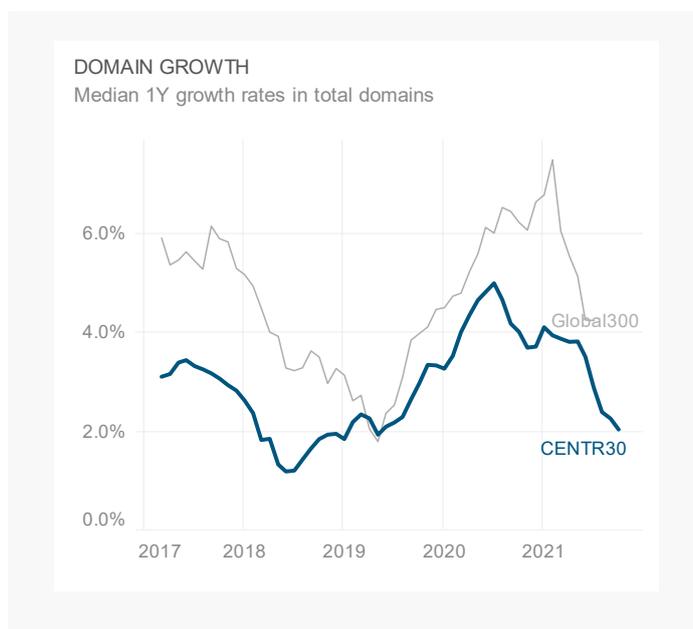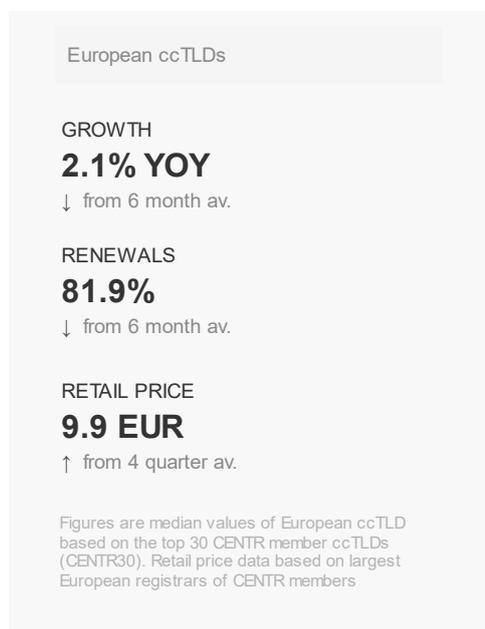
EUROPEAN ccTLDs | July 2022

Key stats[1]

- New domain sales increased between Q4 2021 and Q1 2022, but have however slowed since and are now returning to pre-pandemic levels. This slowdown has been accompanied by a similar slowdown in deletions (incl. non-renewals) suggesting that for most ccTLDs, there are still more new domains being added than deleted.

- The median growth was 2.0% in the year to July 2022 (down from the 6 month average). The median renewal ratio also fell below the 6 month average to 83.6%.

- The highest growth ccTLDs in the 12 months to July 2022 were: .pt, .is, .dk, .ee and .ba .

- The average rates of domain transfers between registrars have declined since peaks in late 2020.

- DNSSEC adoption rates are low, but have however been steadily increasing over time. ccTLDs with the highest proportion of DNSSEC enabled domains are .no, .cz, .nl, .se and .sk, each with over half their zones signed.

- The advertised prices of European ccTLD registrations have been increasing over the 12 months, with a recently recorded a median of 9.9 EUR (incl. tax) – up from 9.0 EUR 12 months prior.

- As estimated 44% of European ccTLD domains have a developed website – down slightly from 12 months prior. The rest are made up of parked domains (27%) and domains with DNS or other technical errors (29%).

Market in Europe and registration trends

After an unprecedented 2 years of above average demand for new domains, European ccTLDs have largely returned to registration rates that are consistent with long term averages. At its peak in early 2021, there were roughly 17 newly registered domains for every 10 that were deleted or expired. More recently, this ratio has dropped back to 12 new domains for every 10 deletes, putting it closer to that of 2019. This of course has pushed the net growth rates down, however this reduction is largely driven by a return to average demand for new domains rather than an

European ccTLDs

GROWTH
2.1% YOY
↓ from 6 month av.

RENEWALS
81.9%
↓ from 6 month av.

RETAIL PRICE
9.9 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

DOMAIN GROWTH
Median 1Y growth rates in total domains

Source: CENTR. Dashboard by CENTR (www.centr.org) 2022

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1 Most of the ccTLD data above is based on the top 30 largest CENTR member ccTLDs by domains (CENTR30).

Data on web scans is based on CENTR 'signs of life' domain crawler which scans ~20 CENTR member ccTLDs and the top 100 gTLDs on a monthly basis, classifying domains into technical areas (e.g. DNS error, parked etc). Each TLD is scanned using a random sample of 50,000 domain names.

increase in deletes which would be more worrying. European ccTLDs grew at a median rate of 2.0% (CENTR30) in the 12 months to July 2022.

As Europe emerges from lockdowns and the dust begins to settle, it is worth assessing the impact on domain registrations in the region. A couple of indicators to look at are churn rates (domains that were deleted or expired without renewal)and domain usage data which can give an insight into the extent to which new domains registered over 2020 and 2021 have been retained as well as how they are being used. While the nature of domain registration cycles (generally a minimum of 1 year) means it is still a little early to fully assess this, churn rates so far do not suggest domains are being deleted abnormally. In fact, since mid-2021, the churn rate seems to have declined slightly. In terms of how these domains are being used, we see very little increase in error or parking rates within European ccTLDs (see 'domain usage' section below).

In summary, we believe that European ccTLDs are for the most part returning comfortably to pre-pandemic trends with minimal impact to registration demand.
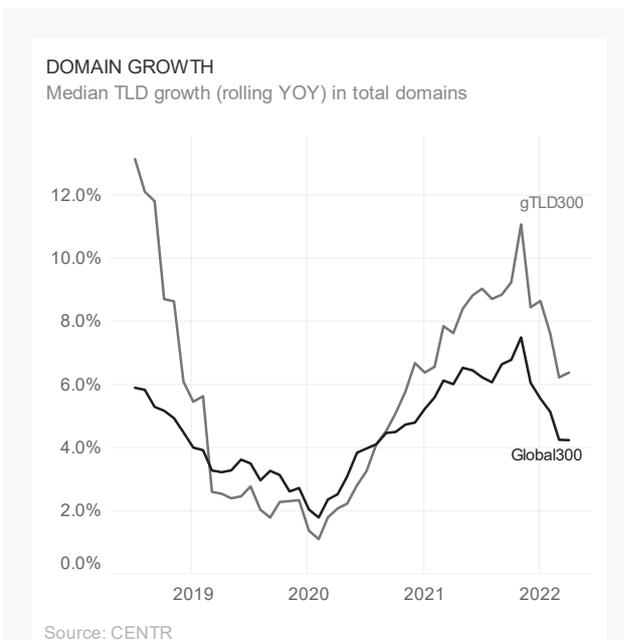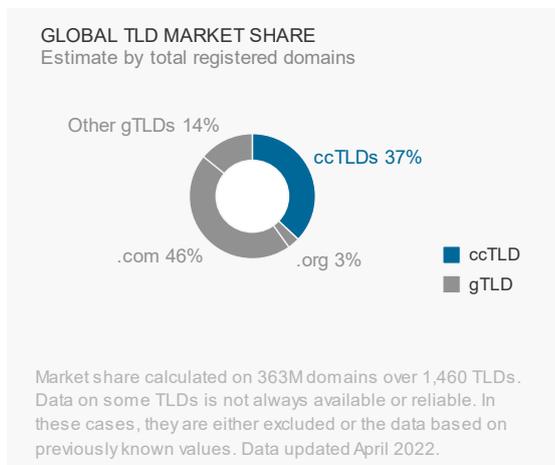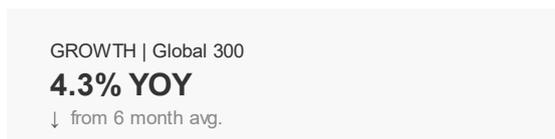
GLOBAL MARKET

Global trends

The global market is estimated at a total size of 363 million domains (April 2022) with some 1,461 recorded TLDs. The median 1 year growth rate of the top 300 largest TLDs (Global300) was 4.3% -down from its 6 month average. In other groups, rates were 3.8% for ccTLDs in the Asia Pacific region, 2.9% for ccTLDs in Europe and 6.4% in the top 300 gTLDs all of which are down on their 6 month average rates. The data suggests that similar to the European market, ccTLDs in other regions as well as gTLDs have all experienced similar registration trends throughout the pandemic and are all now beginning to return to pre-pandemic levels.

Some of the highest growth gTLDs over the 12 months to April 2022 were: .cyou, .click and .finance however most domains in these TLDs have very little web content and instead return DNS and HTTP errors. Based on the top 100, the most well used gTLDs when measured by active websites are .tel, .cat, .church, .earth and .berlin.

GROWTH | Global 300
4.3% YOY
↓ from 6 month avg.

GLOBAL TLD MARKET SHARE
Estimate by total registered domains

Other gTLDs 14%

ccTLDs 37%

.com 46%

.org 3%

■ ccTLD
■ gTLD

Market share calculated on 363M domains over 1,460 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 April 2022.

DOMAIN GROWTH
Median TLD growth (rolling YOY) in total domains

Source: CENTR

DOMAIN USAGE

It has become apparent since the beginning of 2022 that there are significant differences in the way ccTLDs and gTLDs are being used. While error rates in European ccTLDs increased by 2%, they increased by an alarming 10% in gTLDs (based on the top 100 gTLDs). While it is tempting to think this may be driven by smaller 'junk' gTLDs, even some larger legacy gTLDs such as .com, .org and .info have experienced significant increases in error rates.

One theory to the rise in gTLD errors could be domain speculation – that is, domains bought purely for the purpose of on-selling at a higher price. gTLD domains that were registered during the pandemic for speculation are likely to still be found in zonefiles, meaning that are they pushing up the error and parking rates. It is expected that

at least a reasonable chunk of these domains will eventually be purged, which should reduce the error and parking rates of gTLDs.

In summary, it seems the experience of the pandemic for European ccTLDs and gTLDs has been noticeably different. Whereas for European ccTLDs it appears that more of the new domains registered over the period were used for developed web sites, the situation for gTLDs likely saw higher rates of speculation. This supports other theories referenced during the pandemic that national ccTLDs may have been a good choice for individuals starting new businesses as they offer a more uniquely local identity – the type of identity which is crucial for small businesses trying to grow.

CLASSIFICATIONS

	ccTLDs	gTLDs
Developed websites	44%	19%
Parked	27%	23%
Not functioning / errors	29%	58%

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.
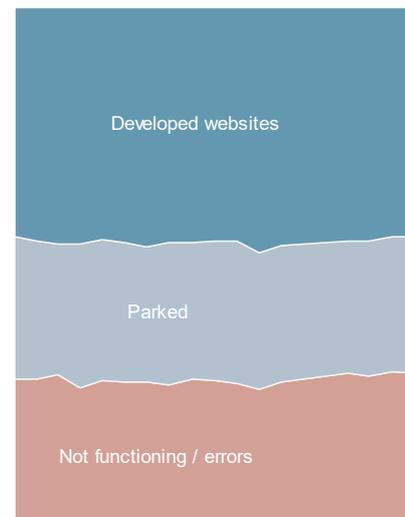
ATTRIBUTES | developed websites

	ccTLDs	gTLDs
MX record present	82%	65%
Forced HTTPS	68%	67%
Redirected	27%	33%

Jul 2022

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.

TRENDS IN CLASSIFICATIONS
High level classifications of ccTLD domains

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.

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.
Domain usage
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. The landing page of each TLD is scanned based on a random sample of 50K domains from the zone. Where a redirect occurred, it is the final URL which is assessed and classified. The crawler also measures attribute information domain redirections, MX records, languages and more.

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

View the interactive report ↗