Council of European National
Top-Level Domain Registries

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 1_2023

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Key Trends in European ccTLDs

- Domain growth has been steadily rising throughout 2023, reaching 2.0% in July 2023.
- The median demand ratio (the relationship between new registrations and deletions) is 1.2, up slightly to 1 year prior and similar to long term trends.
- Market share of European ccTLDs is estimated at 51% based on locally registered domains in the country and 36% based on popular websites.
- The retail price for a European ccTLD increased slightly over the 12 months leading up to July 2023, with a buy price of 10.4 EUR. The same registrars advertise .com domains at 12.6 EUR.
- Median DNSSEC adoption rate recently hit a milestone of 10% (DNSSEC enabled domains as a proportion of domains under management) and is continuing to grow consistently.
- The rate of developed websites using SSL increased 4% in the year to May 2023.

All figures based on medians across European ccTLDs and markets.
More details on ratios and methodologies in the notes section at the bottom of this page

Insights in Registration Trends

Over the first half of 2023, domain growth among European ccTLDs recovered from a record-breaking low at the beginning of the year to reach median growth of 2.0% in July. While the rebound is encouraging, it's worth exploring the underlying dynamics.

The relationship between new domain registrations and deletions is measured in CENTR by the 'demand ratio'. This ratio describes the relationship between domains that are newly created and those that expire or are deleted and is considered an important lead indicator to domain growth in a TLD. To achieve positive growth, the demand ratio should be above 1, meaning more domains are being registered than deleted. If the ratio dips below 1 for a sustained period of time, the TLD is likely to enter a phase of contraction.

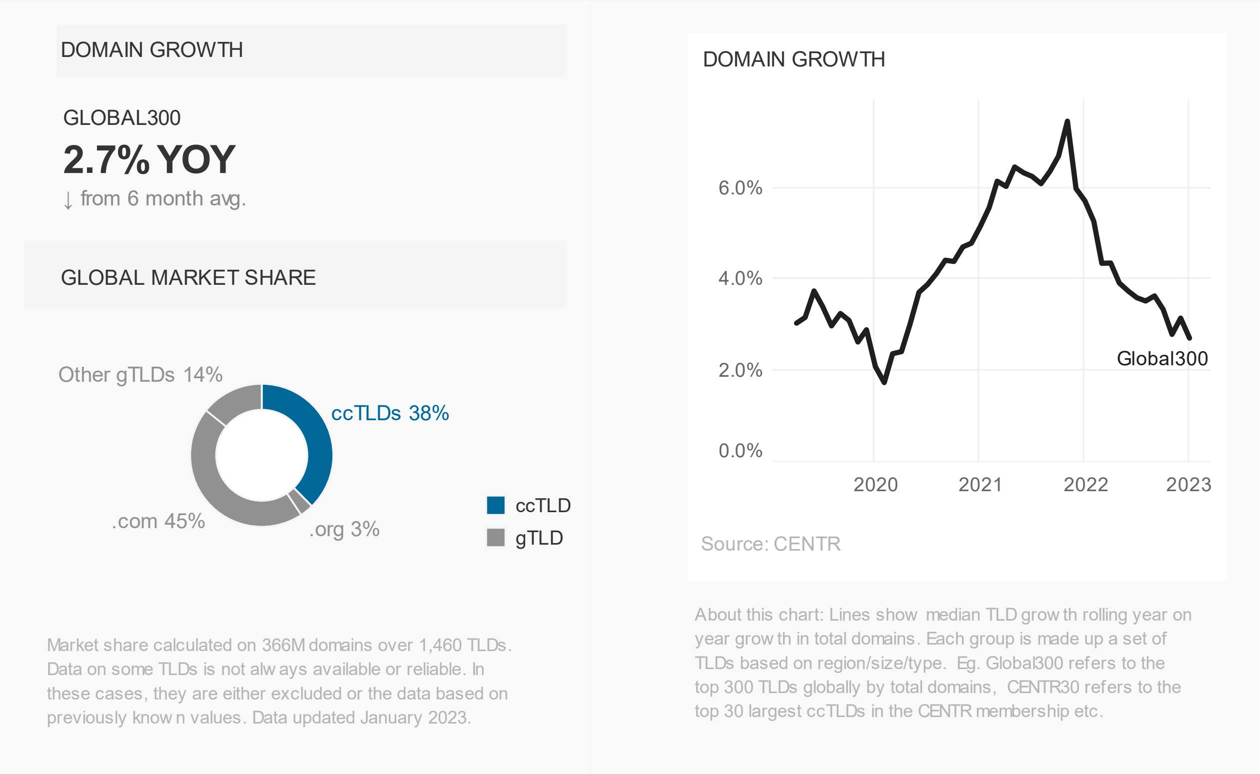
As of July 2023, the median demand ratio is 1.2 which is very similar to one year prior. While the median rate is considered healthy and generally aligned with long term trends, it does vary considerably between registries.

In the first half of 2023, around half of the European ccTLDs studied experienced increases in their deletion rates. This may be due to the circumstances brought about by the Covid 19 pandemic. As previously reported, many ccTLDs produced large spikes in new domain registrations during Covid. It is possible that some of the recent increases in deletions we are observing may be linked to that period as those that registered domains during Covid have now let them lapse.

Another pressure in 2023, has been the elevated inflation rates across Europe . This is likely to have contributed to a cautious macroeconomic environment and in turn resulted in impacts to domain registrations across the region.

Both of these observations are likely to put increased pressure on demand ratios. Registries that have started with higher ratios are likely to better withstand the pressures while those with weaker ratios will face a more a precarious outlook and greater insecurity for the registry.

FIGURE 1: Statistics and trends in European ccTLDs



How Domains are being used

How domains are used is considered a crucial indicator to the performance of a TLD as well as it’s long-term viability. To measure usage, CENTR checks millions of domains, querying the existence of a webpage and other attributes such as MX records, SSL and redirect chains.

The rate of domains that have a developed websites among European ccTLDs is around 43%. While the web development rate for European ccTLDs has room for improvement, on average they are considerably higher than other established TLDs such as .com at 29% and .org at 33%. Among the new gTLDs launched in 2014 the rate is far lower at around 16%.

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In other domain classification metrics, the rate of sites with web content (excluding parked) with SSL certification is at 72%, an increase of 4% in the year to May 2023. Presence of MX record is around 82% versus 70% among gTLDs.

FIGURE 2: Statistics and trends in Domain usage

CLASSIFICATIONS

	European ccTLDs	gTLDs
Developed websites	43%	16%
Parked	27%	21%
No web content / errors	30%	63%

ATTRIBUTES | developed websites

	European ccTLDs	gTLDs
MX record present	82%	70%
Forced HTTPS	72%	75%
Redirected	28%	37%

Updated: May 2023
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 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.

The Global Market

Data updated to April 2023. 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 to be between 360-370 million domains over 1,456 recorded TLDs. It is distributed roughly as follows: 45% to .com, 38% to ccTLDs, and the remaining to all other gTLDs.
- Median growth of the top 300 largest TLDs (Global300) was recorded at 2.3%, down from the 6-month average.
- The top 300 gTLDs grew at a median rate of 1.9%, which is below the global average. For larger gTLDs (top 100), the rate was 5.9%. Overall demand for gTLDs has been slowing in the months post-covid but has stabilized in 2023.
- Since the “new gTLDs” began launching almost a decade ago, they have not made significant gains in global market

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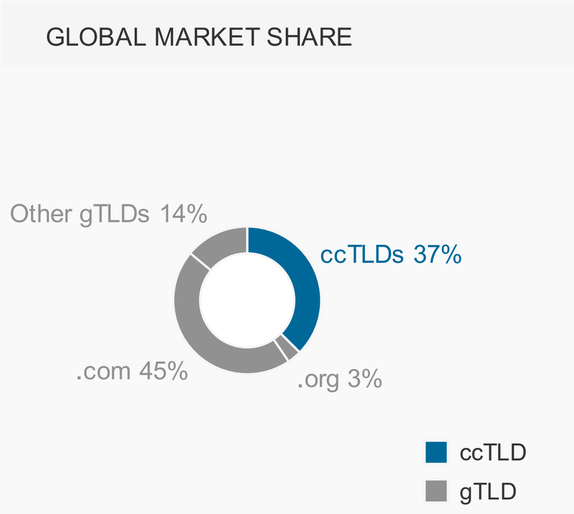
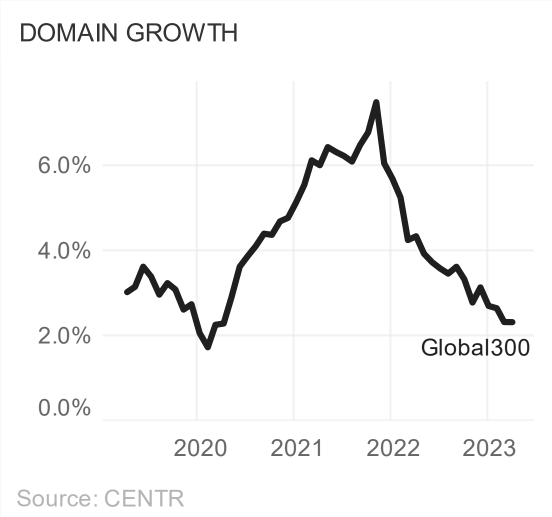
share. Their share is estimated at combined 10%, a figure which has barely changed over the past few years.

- Active web usage (excluding parking pages) of gTLD domains is estimated at 30% in .com, 33% in .org and a median rate of 16% in other gTLDs. gTLDs with high rates of active web content are .tel, .cat, .solutions, and .berlin.
- In the 12 months leading up to April 2023, there was a 12% rise in the rate of gTLD domains which were found to have no server or IP address associated.

FIGURE 3: Statistics and trends in global domain registrations





Market share calculated on 366M 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 January 2023. Growth line shows median growth (year on year) of the top 300 largest TLDs globally

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METRICS AND RATIOS

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. A demand ratio is calculated as total creates divided by total deletes in a given month.
3. Renewal rate calculated as total renews divided by combined renews and deletes in a given month

SOURCES AND METHODOLOGIES

Registration data ccTLD registrations sourced from CENTR, Net Knowledge, APTLD and 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 registration data sourced from ICANN.

Pricing data 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. Local registrations – to calculate market share based on local registrations, we analyse the total local registrations made in most member countries. For ccTLD registrations in each country, the data comes from CENTR members directly. For gTLDs 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.

Market share and TLD popularity indicators Market share based on 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.

TLD popularity in country uses the 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.

Domain usage data 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.

TERMINOLOGY

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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