

DomainWire

Edition 11 – Q1 2015

Global TLD Stat Report

DomainWire Stat 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). A ccTLD is a two-letter domain name extension such as .de (Germany), .es (Spain) or .cz (Czech Republic).

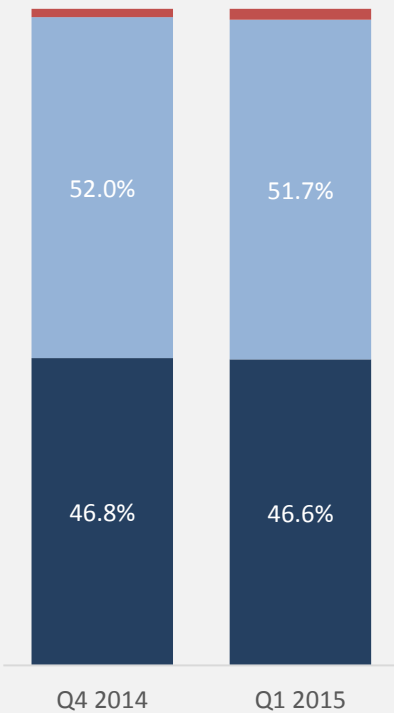
CENTR is the association of European country code top-level domain (ccTLD) registries, such as .de for Germany or .si for Slovenia. CENTR currently counts 52 full and 9 associate members – together, they are responsible for over 80% of all registered country code domain names worldwide. The objectives of CENTR are to promote and participate in the development of high standards and best practices among ccTLD registries.



Global Registrations Overview

ccTLD and gTLD Global Market Share

■ ccTLD ■ legacy gTLD ■ new gTLDs



Total registrations across all top-level domains (TLDs) stood at **293.3 million** at the end of the first quarter 2015. This represents a growth of roughly 1.3% (3.8 million registrations) over the quarter. The growth came fairly evenly from across the legacy gTLDs, new gTLDs and the ccTLDs.

Combined registrations in new gTLDs stood at around 4.8 million over 560 delegated TLDs (not all are in general availability). This growth has taken its total TLD market share from 1.2% in Q4, 2014 to around **1.7%** in the latest quarter. It's worth noting that like some ccTLDs, several new gTLDs offer free domains.

The market share between ccTLDs and gTLDs is relatively even, however weighted in favour of legacy gTLDs currently at around 52% of all registrations. It's worth noting that the market share values in the chart include TLDs that offer free domains (such as .tk and several the new gTLDs).

	REGISTRATIONS	% GROWTH Q1/2015	
		COMBINED	MEDIAN
ccTLD	135,455,695	0.9%	1.6%
ccTLD IDN	1,312,236	-3.5%	-0.4%
Legacy gTLD	150,840,717	0.9%	-1.0%
sTLD	870,333	-12.9%	-2.0%
New gTLD	4,869,420	36.5%	21.1%
Total	293,348,401	1.3%	

Market share chart: ccTLDs include ccTLD IDNs. Legacy gTLDs include sTLDs (Some sTLDs have a delay in data of 4 months)
Legacy gTLDs = biz, com, info, mobi, net, org. sTLDs = aero, asia, cat, jobs, museum, name, post, pro, tel, travel.

Top 20 ccTLDs by Total Registrations

1	Tokelau (.TK)	28.6
2	Germany (.DE)	15.9
3	China (.CN)	11.7
4	United Kingdom (.UK)	10.6
5	Netherlands (.NL)	5.6
6	Russian Federation (.RU)	4.9
7	European Union (.EU)	3.9
8	Brazil (.BR)	3.6
9	Australia (.AU)	2.9
10	France (.FR)	2.9
11	Italy (.IT)	2.8
12	Argentina (.AR)	2.6
13	Poland (.PL)	2.5
14	Canada (.CA)	2.3
15	Switzerland (.CH)	1.9
16	Colombia (.CO)	1.8
17	Spain (.ES)	1.8
18	United States (.US)	1.8
19	India (.IN)	1.5
20	Belgium (.BE)	1.5

High Growth (from top 20 list) (Q1/2015)

Colombia (.co)	8.4%
China (.cn)	4.1%
Italy (.it)	2.0%
Brazil (.br)	1.8%
Australia (.au)	1.4%
Canada (.ca)	1.4%
France (.fr)	0.9%
Spain (.es)	0.9%
Russian Federation (.ru)	0.7%
United Kingdom (.uk)	0.6%

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 28 million reported domain names. However, it offers mostly free domains on a global level and derives revenue 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. Colombia (.co) saw the highest growth with 8.4% (around 142k domains) for this quarter.

European ccTLDs Registration Trends

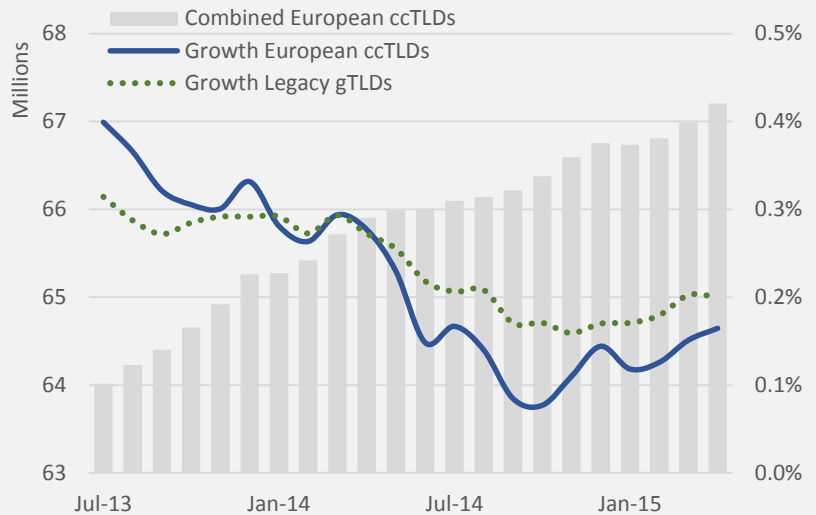
European ccTLDs Quick Look

European ccTLDs closed March 2015 with just over 67 million registrations in total – a net growth of 0.7% over the past quarter with median ccTLD growth at 0.82% for that period.

The chart (right) shows a longer term trend using 6 month moving averages to smooth the line. Recent months suggest a stabilisation of growth among European ccTLDs as well as the legacy gTLDs. Generally however, registration growth for both combined and median ccTLD rates, continues to decline over the past few years.

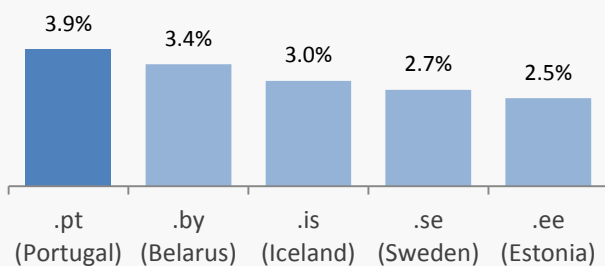
In recent CENTR studies, it was found that retention rates* (a calculation to indicate renewals) across ccTLDs in Europe have remained steady over the past 3 years at around 84%. The rate of creations (newly created domain names) has however been slowly declining.

Est. ccTLD Registrations (Europe):	67.1 million
Q1 Growth – Combined/Median ccTLD:	0.70%/0.82%
Median Retention (<i>renewals</i>) Rate* (2014):	84.3%
Largest Zone:	.de (Germany) 15.9 million
DNSSEC Status:	34 signed zones (74%)



Growth Lines: 6 month moving averages are used to smooth the line
 *Retention rate = (Domains at end of n – new domains in n) / Domains at beginning of n
 Data Source: ccTLDs (CENTR), gTLDs ICANN

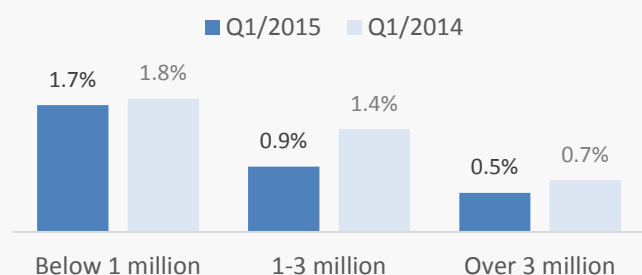
Top 5: Registration Growth (Q1/2015)



The chart (left) shows the top 5 highest European ccTLD growth over the most recent quarter. The ccTLD .pt (Portugal) has grown the highest at 3.9%. While they cannot pin this growth on any one particular aspect, it is worth noting they have been making special efforts in reaching their registrar channels for advocating the importance of domain names associated with the national identity. Market share against gTLDs in Portugal is also above the European median at 66%*.

*Data sourced Q2/2014 from ZookNIC

Median Growth by Zone Size



The chart (left) shows the average (median) growth rates grouped by their zone size in Q1, 2015 as compared to the Q1 growth in 2014. Generally, all groups have seen a decrease in median Q1 growth – a trend that is familiar to many mature top-level domains (including gTLDs).

Strong growth zones under 1 million were .pt, .by and .is. In the 1-3 million group they were .se, .it and .cz. In the 3 million plus category, the highest growth was seen in .uk at 1.1% for the quarter.

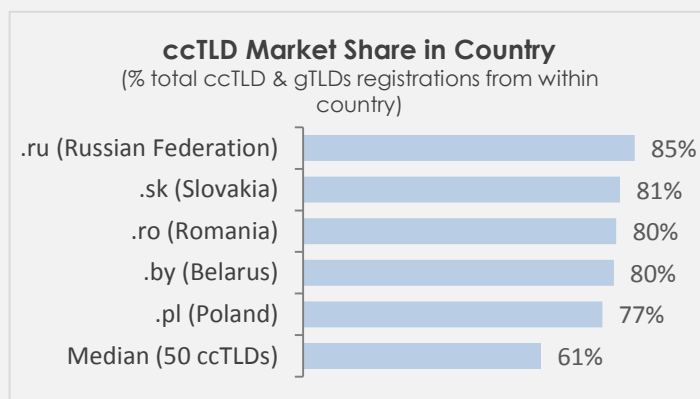
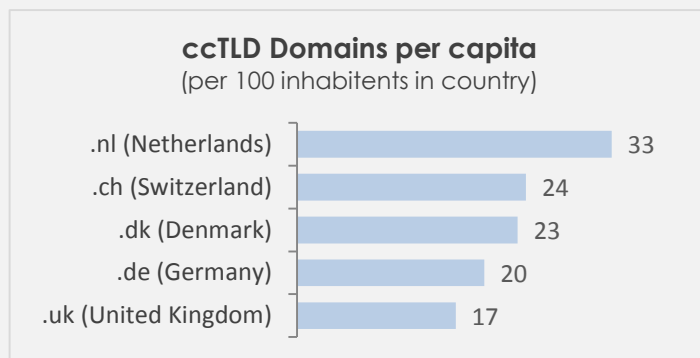
European ccTLDs – Market Shares

The charts to the right show two methods in measuring market share or penetration of a ccTLD: (1) domains per capita in the country; and (2) the market share of ccTLDs against all domains (inc. gTLDs) in the country. The top 5 in each category are displayed for each.

ccTLD Per Capita – The .nl ccTLD (The Netherlands) has the highest number of ccTLD domains per capita – 33 per every 100 inhabitants. The largest country in terms of population is Germany (80+ million inhabitants) and has 20 domains per 100 inhabitants.

TLD Market Share in the Country – In terms of ccTLD market share in the country, the Russian Federation has the highest internal share with 85% of all domains registered from within the country being the local .ru ccTLD. Across 50 ccTLDs the median rate of ccTLD market share is 61% – a small increase from data in 2012.

Note: ccTLDs with a significant number of registrants outside their country are not included in the above charts
Sources: CENTR, ZookNIC, CIA Factbook. Market Share data: Q2 2014



New gTLDs: registration trends

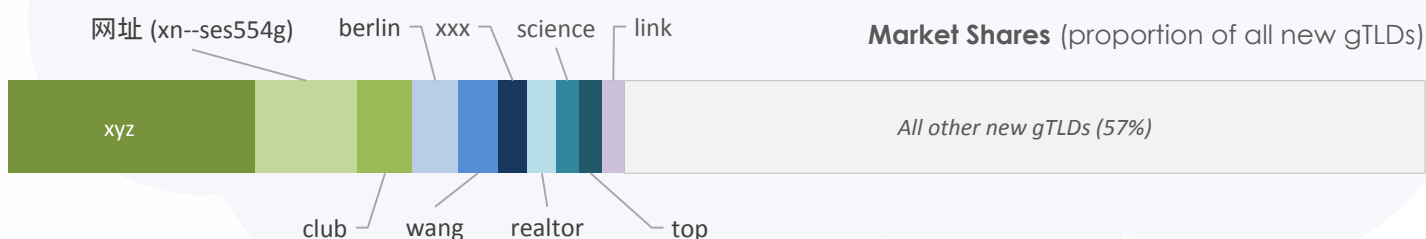
Since new gTLDs began entering the root zone at the beginning of 2014, they have grown to around 5 million domains with combined growth at 33% for Q1 2015. The 5 million registrations are spread over some 500 TLDs. However, around 200 of those have not yet gone into general availability.

The median growth rate of the top 100 new gTLDs for Q1 2015 was 14% and the median growth of the geo-TLDs was 5.3% across 34 city TLDs.

Note: As mentioned on page 1, it is worth noting that some new gTLDs give away domains for free. This can give a varied impression of the success or relevance of a TLD and should be considered when reading these figures.

New gTLD	Registrations	Growth (Q1/2015)	Category
xyz	840,883	12%	Lifestyle
网址 (xn--ses554g)	345,747	239%	Technology
club	189,765	24%	Lifestyle
berlin	153,186	1%	Geo
wang	136,018	39%	Technology
xxx	101,645	NA	Industry
realtor	95,171	6%	Real Estate
science	79,477	NA	Education
top	78,169	109%	Lifestyle
link	75,389	46%	Technology
All other	2,722,800		
Total New gTLDs	4,818,250	33%	

Source: ICANN. Data recorded 1 Apr 2015



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 name 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 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. For any questions on this report, please contact patrick@centr.org

