Council of European National Top-Level Domain Registries

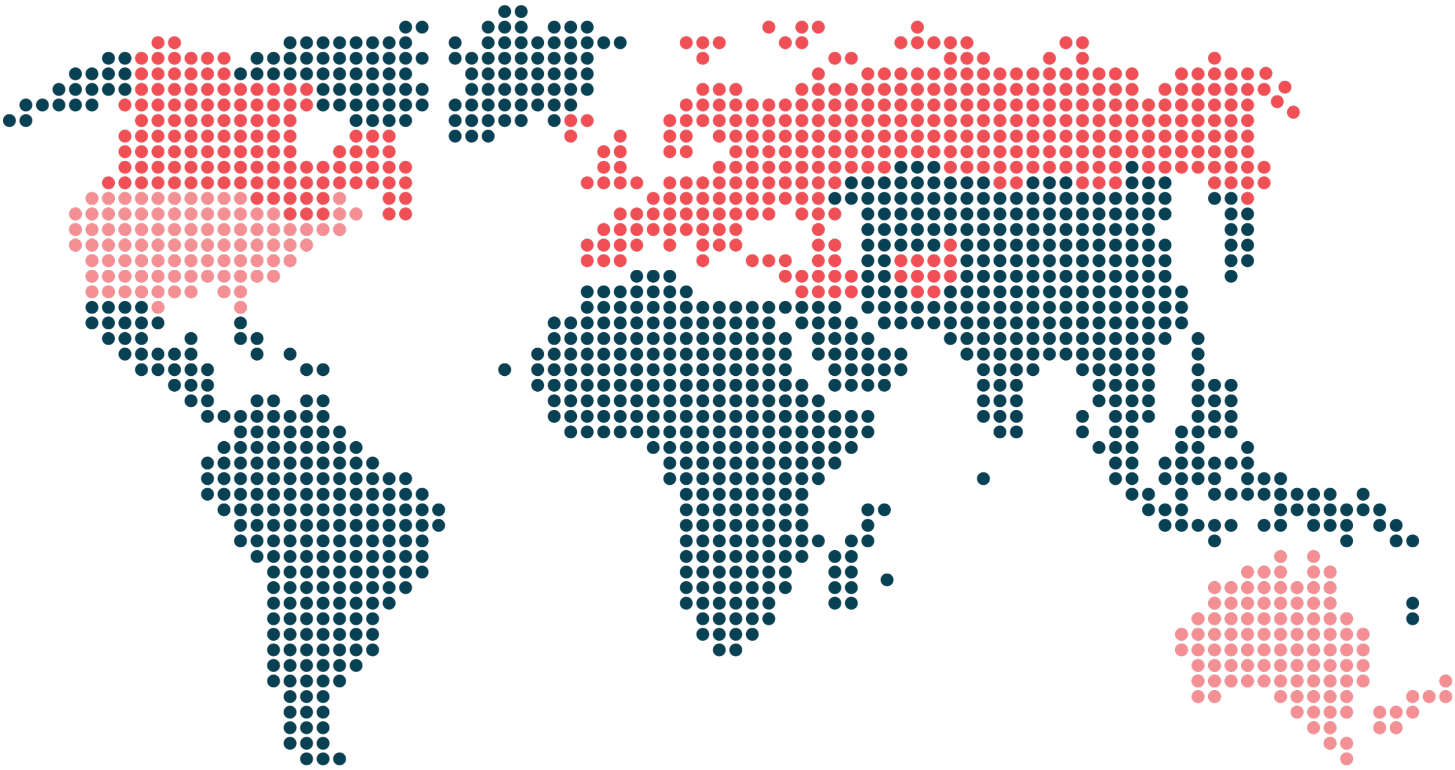
CENTRstats Global TLD Report is CENTR's quarterly publication covering status and trends in global top-level domains with a focus on European ccTLDs (country code top-level domains).

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

Q3 2020 – Edition 32



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EUROPE

European ccTLDS - Q3 2020 has seen a continuation of high rates of new domain creations as well as a slight decrease in deletes. With the exception of August (where registration activity is typically much lower due to the European summer), registration activity was high and median growth continued to increase (0.9% over the quarter and 3.4% over the past 12 months). For several countries, the national ccTLD also gained market share based on 'popular website' ranks from Alexa[1] (up 2% on average).

The increase in growth rates is a welcome boost for ccTLDs after many years of stagnation. In the height of the first lockdown, creates were in many cases up 20% from the same time in 2019. The question remains on how many of these domains will be kept once their renewals are due. For many CENTR member ccTLDs, they may hold some degree of optimism on this, for two reasons – domain usage and renewals. Based on technical analysis, member ccTLDs are almost twice as likely to host 'high content' (domains that do not have errors and are not used for parking purposes) than gTLDs (based on the top 100)[2]. Closely tied to this is the rates of renewal among ccTLDs which is on average 17 percentage points higher than gTLDs (based on the top 300). These factors position ccTLDs well to weather any purge of domains in the coming renewal cycles.

Key observations:

- The median create ratio (new domain registrations normalised to total domains) was 4.4% for Q3 2020. The median deletion ratio in the same period was 3.3%.
- Since April 2020, median deletion ratios have decreased, suggesting domain holders are opting to hold on to their domains in larger numbers.
- The enlarged gap between creates and deletions has further pushed up overall growth of domains in ccTLDs.
- Market share as measured by local registrations in CENTR member countries is estimated at 57% in favour of national ccTLDs. Measured by the TLDs used in popular websites (Alexa ranks) across the region, the overall market share of ccTLDs is 48%. For many countries, their internal market share based on this indicator has increased over the quarter (on average by 2%). This may suggest that for some there is a subtle preference shift from gTLDs to ccTLDs. Reasons for this may be that ccTLDs can offer a more *locally-focused* identity – an important characteristic for small businesses trying to survive during national lockdowns.
- Retail pricing of domains over the quarter has remained largely stable. The range of price offerings from different registrars and ccTLDs is wide with the middle 50% of prices found between 9 EUR and 19 EUR (inc. VAT) including promotions.
- The rate of 'high content' (domains that host functioning web pages that are not used for parking) domains are around 46% for member ccTLDs compared to 25% in the top 100 gTLDs.

[1]Alexa Rank is a rating service for evaluating websites, based on the frequency of visits/views. As many websites appear in the Alexa ranks of multiple countries, figures for Europe are based on non-unique websites. For example, google.com is counted multiple times. This means that market share figures at European level reflect the true prevalence of different domains and TLDs across the region.

[2]Domain usage methodology based on the CENTR 'signs of life' domain crawler. Sample (Oct 2020) 50K random sample of: at, au, ca, ch, de, dk, ee, fr, me, nz, pl, se, si, sk, us + top 100 gTLDs

EUROPE - ccTLD REGISTRATIONS | Q3 2020

Ratios based on CENTR30

Growth	Median Renewal
0.9%	84%
↓ from last quarter	↓ from last quarter

Creates ↓	Deletes ↓	Transfers ↑
from last quarter	from last quarter	from last quarter

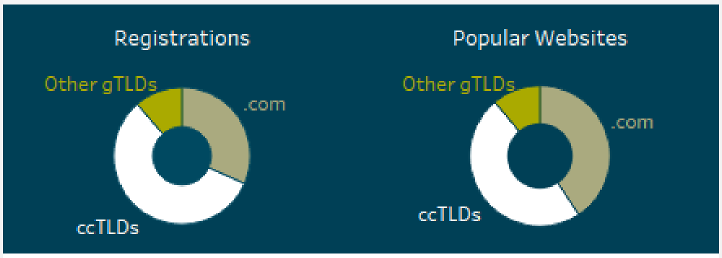
DOMAIN GROWTH

Median 1 year rolling growth of the CENTR30

Source: CENTR

EUROPE - TLD MARKET SHARE | Q3 2020

By registrations and popular websites (Alexa ranks)



At the end of the quarter, domains under managment across recorded European ccTLDs is estimated at 70M. Sources to this report: CENTR, ICANN, Napolean stat, Zooknic

View the interactive report

GLOBAL OUTLOOK

The global market share of domain name registrations is roughly 47% to .com, 33% to recorded ccTLDs (243) and 20% to all other gTLDs. Growth rates in domains have increased over the second quarter with medians of 1.3% among ccTLDs (top 100) and 0.8% for gTLDs (top 300).

TLDs with high growth over the quarter include:

- gTLDs: .cam, .bar and .page
- ccTLDs: .ar (Argentina), .py (Paraguay), .lk (Sri Lanka)

For many gTLDs, the margin between domain creates and deletes is very small. While the rates for new domain creations have been increasing since the beginning of the year, deletions are not far behind. This was particularly noticeable in May 2020 when the median deletion rate jumped considerably. gTLDs with particularly large quantities of deletes over the quarter were .shop, .dev and .world.

The distribution of domains among unique gTLDs is represented in the dashboard by the concentration ratio. This ratio measures total gTLD domains held by the top 10 as a proportion of all gTLDs. Since the introduction of hundreds of new gTLDs, consumer choice has naturally increased, which is why this ratio is now important to watch. It gives an indication as to whether the choice offered is being translated into actual sales. For the first few years after the introduction of new gTLDs, the concentration ratio decreased, however it has for the first time shown recent signs of a turn around. This suggests that despite having hundreds of gTLDs to choose from, purchases are leaning increasingly on a small handful of the larger gTLDs. It is important to note that the increase in domains in a TLD is not necessarily linked to actual usage and TLD preference – it may be explained simply by promotional or free domain campaigns. CENTR will continue to track these figures.

GLOBAL GROWTH TRENDS | **Q2 2020**

ccTLD100	gTLD300
1.3%	**0.8%**
↑ from last quarter	↓ from last quarter

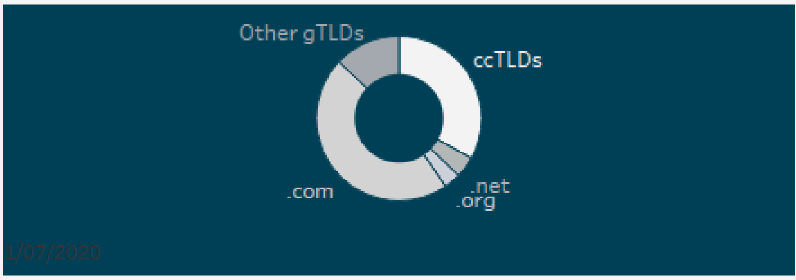
DOMAIN GROWTH | **GLOBAL100**

Rolling 1 year median

Source: CENTR

GLOBAL MARKET SHARE

Measured by total domains under management



The above excludes TLDs to which CENTR does not have reliable data on. Total domains across this sample is 330.5M. Net growth was 0.7% over the quarter, and 2.6% over the past year.

gTLD REGISTRATIONS | Q2 2020

Key ratios and trends in gTLD registrations

Growth / Q2 2020	Renewal rate	Concentration (top 10)
0.8%	**67.3%**	**88.7%**
↓ from last quarter	↓ from last quarter	↑ from last quarter

Creates ↑	Deletes ↑	Transfers ↑
from last quarter	from last quarter	from last quarter

LONG TERM GROWTH

Median 1 year rolling growth of the top 300 gTLDs

At the end of the quarter, domains across all recorded gTLDs is estimated at 219M. Net growth was over the quarter, and over the past year.

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 .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.
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