



Domain Marketplace and ccTLDs

ICANN 57 – gTLD Marketplace Health Index Advisory Panel Working Meeting

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VERISIGN

Domain Marketplace and ccTLDs

- Largest ccTLD registries regularly make data available regarding the domains they are responsible for managing
 - CENTR and Verisign both publish quarterly on the combined market
 - At the end of Q3 2016, CENTR reported that there are 138M ccTLD names in the marketplace and registries for which their base size is publicly available account for at least 77% of these names
- Evaluating the domain marketplace using exclusively gTLDs introduces disproportionate regional bias to marketplace characterization
 - On average, 51% of registrants' portfolios in European countries are made up of national ccTLDs
 - Analyzing top 100 most popular domains by country according to Alexa indicates wide variance in each countries use of their national ccTLD

<https://www.centr.org/library/library/statistics-report/domainwire-global-tld-report-2016-3.html>
<http://www.alexacom/topsites/countries>

Existing Publications

Verisign and CENTR

Quarterly CENTR Report

Global Market

Volume, Growth & Distribution

Q3/2016

GLOBAL OVERVIEW

There are roughly 326 million domains names across all top-level domains (TLDs) globally*. Combined growth over Q3 2016 was around 2.1 million (0.7%), most of which came from gTLDs (mostly new gTLDs).

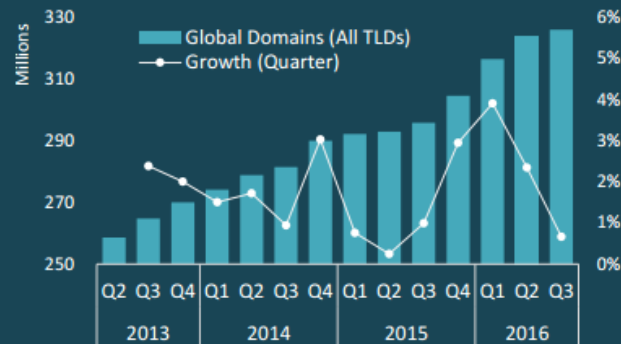
MEDIAN GROWTH

As the bulk of new gTLDs have now been delegated, their high initial growth rates are beginning to converge toward comparable median rates of legacy gTLDs and ccTLDs (0.43% and 0.58% respectively for Q3 2016). *See last page for more details.*

*Recorded over 1,435 TLDs

MARKET SHARE

Global distribution between TLD categories (chart below) is weighted toward gTLDs (legacy and new combined). ccTLDs (inc IDN ccTLDs) have a combined 43% - a reduction of 2% over the quarter due to a decline in .tk domains. New



Global Market		
	Median Growth Q3 2016	Domains (million)
ccTLDs	0.58%	138.4
IDN ccTLDs	0.04%	1.8
Legacy gTLDs	0.43%	163.5
New gTLDs	0.95%	22.2
Total		325.9

Medians based on: top 12 Legacy gTLDs, top 300 new gTLDs, top 100 ccTLDs.

<https://www.centri.org/library/statistics-report/domainwire-global-tld-report-2016-3.html>

Quarterly Verisign Report

Largest ccTLDs by Number of Reported Domain Names

Source: Zooknic, Q2 2016

For further information on the Domain Name Industry Brief methodology, please refer to the last page of this brief.

Total ccTLD domain name registrations were approximately 149.9 million in the second quarter of 2016, with an increase of 1.4 million domain name registrations, or a 1.0 percent increase compared to the first quarter of 2016. ccTLDs increased by approximately 11.7 million domain name registrations, or 8.5 percent, year over year. Without including .tk, ccTLD domain name registration growth quarter-over-quarter was 1.2 percent and growth year-over-year was 10.7 percent.



The top 10 ccTLDs, as of June 30, 2016, were .tk (Tokelau), .cn (China), .de (Germany), .uk (United Kingdom), .ru (Russian Federation), .nl (Netherlands), .br (Brazil), .eu (European Union), .au (Australia) and .fr (France).

As of June 30, 2016, there were 292 global ccTLD extensions delegated in the root, including Internationalized Domain Names (IDNs), with the top 10 ccTLDs composing 67.3 percent of all ccTLD domain name registrations.

<https://www.verisign.com/assets/domain-name-report-sept2016.pdf>

Publicly Available Data

Registries for which data is available

Data sources for ccTLD Data

TLD	Disclosure Frequency	Registry Source
.AT	Monthly	https://www.nic.at/uebernic/statistiken/
.AU	Monthly	https://ausregistry.com.au/domain-reports/
.BE	Monthly	https://www.dnsbelgium.be/whois/stats
.BR	Daily	http://registro.br/estatisticas.html
.CA	Daily/Annual *	https://cira.ca/cira-annual-report-members-2015-2016/strong-financial-foundations
.CH	Quarterly	http://www.nic.ch/statistics/
.CL	Monthly	http://www.nic.cl/estadisticas/crecimiento-detalle.html
.CN	Monthly	http://www.cnnic.net.cn/sjzscnnic/CNymtj/
.CZ	Monthly	https://stats.nic.cz/
.DE	Daily	https://www.denic.de/en/know-how/statistics/
.DK	Daily	https://stats.dk-hostmaster.dk/domains/total%5Fdomains/
.ES	Monthly	http://datos.gob.es/catalogo/numero-de-dominios-es-agente-registrador
.EU	Quarterly	https://eurid.eu/en/about-us/publications/quarterly-report-archive/
.FI	Daily	https://www.viestintavirasto.fi/en/fidomain.html
.FR	Monthly	https://opendata.afnic.fr/fr/produits-et-services/le-fr/opendata-fr.html
.HU	Monthly	http://www.nic.hu/statisztika/
.ID	Monthly	https://pandi.id/en/statistic/
.IE	Daily	https://www.iedr.ie/domain-stats/

* Daily footer updates with zone count, annual report provides detailed look

Data sources for ccTLD Data

TLD	Disclosure Frequency	Registry Source
.IL	Daily	http://en.isoc.org.il/
.IN	Monthly	https://registry.in/
.IR	Daily	https://www.nic.ir/Statistics
.IS	Monthly	https://www.isnic.is/tolur/index.php
.IT	Monthly	http://stats.nic.it/web-stat/
.JP	Monthly	https://jprs.co.jp/en/stat/domains.html
.KR	Monthly	http://isis.kisa.or.kr/statistics/?pageId=010100
.LV	Monthly	https://www.nic.lv/lv/statistika
.MX	Monthly	https://www.registry.mx/jsf/domain%5Fstatistics/monthly/info.jsf
.MY	Monthly	https://www.mynic.my/en/statistics.php
.NL	Daily	https://stats.sidnlabs.nl/#/registration
.NO	Monthly	https://www.norid.no/en/statistikk/
.NU	Daily	Zone AXFR
.NZ	Daily	https://nzrs.net.nz/index
.PL	Daily	https://www.dns.pl/english/zonestats.html
.PT	Daily	https://www.dns.pt/en/statistics/
.RO	Monthly	https://datedeschise.icipro.ro/dataset/rapoarte-domenii-ro
.RU	Daily	http://stat.nic.ru/index%5Fold.shtml

* Daily footer updates with zone count, annual report provides detailed look

Data sources for ccTLD Data

TLD	Disclosure Frequency	Registry Source
.SE	Daily	Zone AXFR
.SK	Daily	https://www.sk-nic.sk/main.jsp
.SU	Daily	http://stat.nic.ru/index%5Fold.shtml
.TR	Daily	https://nic.tr/index.php?USRACTN=STATISTICS
.TW	Monthly	http://statistics.twnic.net.tw/query/dn-querye.cgi
.UA	Daily	https://hostmaster.ua/UAstat/?today
.UK	Monthly	http://www.nominet.uk/news/reports-statistics/
.US	Monthly	http://www.neustar.us/statistics
.VN	Quarterly	http://www.thongkeinternet.vn/jsp/tainguyen/domain%5Ftab%5Fdt.jsp
.ZA	Daily	https://www.registry.net.za/domain%5Fstats.php?gen=1&contentid=104
.PH	Daily	http://stat.nic.ru/index%5Fold.shtml

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Available Data Summary

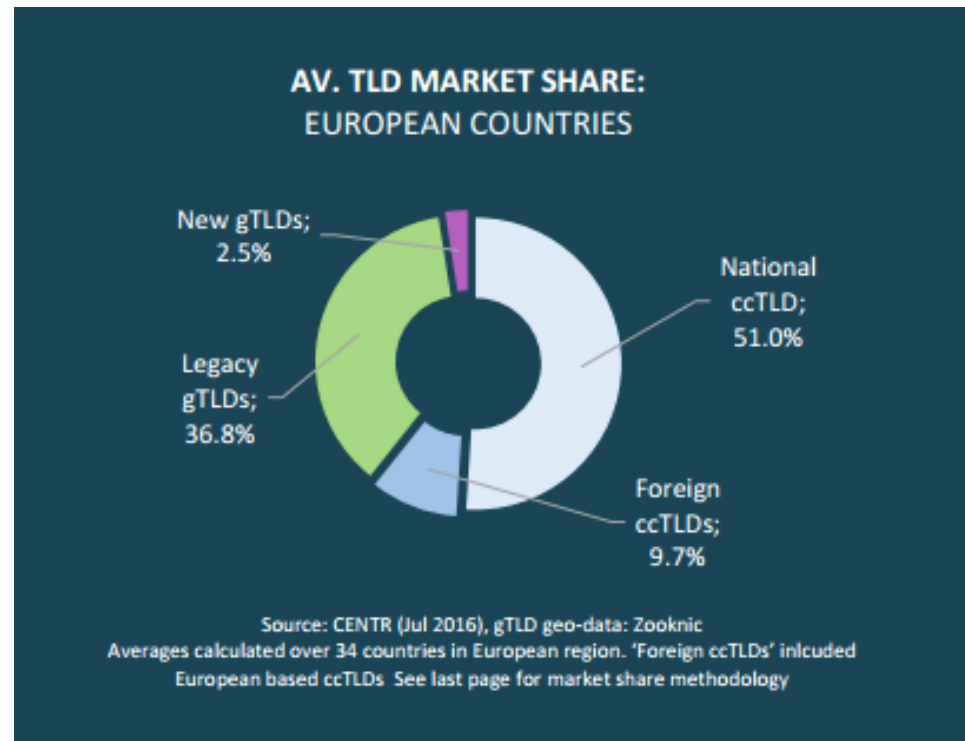
- Spot checking of largest ccTLDs identifies 47 TLDs where top level zone size is available at least annually
 - Daily reporting is not uncommon (21/47)
 - Available statistics are not limited to just base size
 - Several ccTLDs are making their entire base available like .FR, .NU, .SE
 - Others like .NZ and .BE provide robust details about adds, deletes, and regional distribution
- The 47 TLDs discovered in a basic manual scan account for 106.5M of the 138M ccTLDs (77%) that CENTR reports as active
 - Additional TLDs likely disclose their base and some may also be discoverable even if the numbers are not regularly published

https://archive.icann.org/meetings/icann56/schd.ws/hosted_files/icann562016/d7/Wander-ICANN56-DNSSEC-Adoption-v2.pdf

ccTLD Market Distinctiveness

Research by CENTR on European Countries

- CENTR's quarterly report measures market share by TLD for European Countries
 - National ccTLDs comprise 51% of the market
 - gTLDs represent nearly 40% of their market
- Trends across multiple quarters indicate this is stable



<https://www.centr.org/library/library/statistics-report/domainwire-global-tld-report-2016-3.html>

ccTLD Market Distinctiveness

- gTLDs and ccTLDs coexist and share of market varies from one country to the next
 - Disproportional relevance means that exclusion will not uniformly impact all countries
 - Many new gTLDs are targeted to the same market traditionally occupied by ccTLDs
- Many ccTLDs market themselves on the global stage directly against gTLDs
 - Google exempts these ccTLDs from geotargeting after finding that users and webmasters frequently see them as generic:
.AD, .AS, .BZ, .CC, .CD, .CO, .DJ, .FM, .IO, .LA, .ME, .MS, .NU, .SC, .SR, .SU, .TV, .TK and .WS

https://support.google.com/webmasters/answer/62399?hl=en&visit_id=1-636136244643403526-1733688960&rd=1

Conclusion

Conclusion

- ccTLDs are a significant component of the domain marketplace and any index that characterizes the health of that marketplace should consider the ccTLD's role and contribution
 - Data regarding ccTLD market size is more available than you may think and recently the trend has been towards more transparency
 - ccTLDs and gTLDs are frequently relevant in the same markets



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