



Council of European National
Top Level Domain Registries

Recent growth trends

Analysis and discussion

12th CENTR Marketing workshop
Ljubljana, Slovenia
5-6 December 2013

1. Introduction

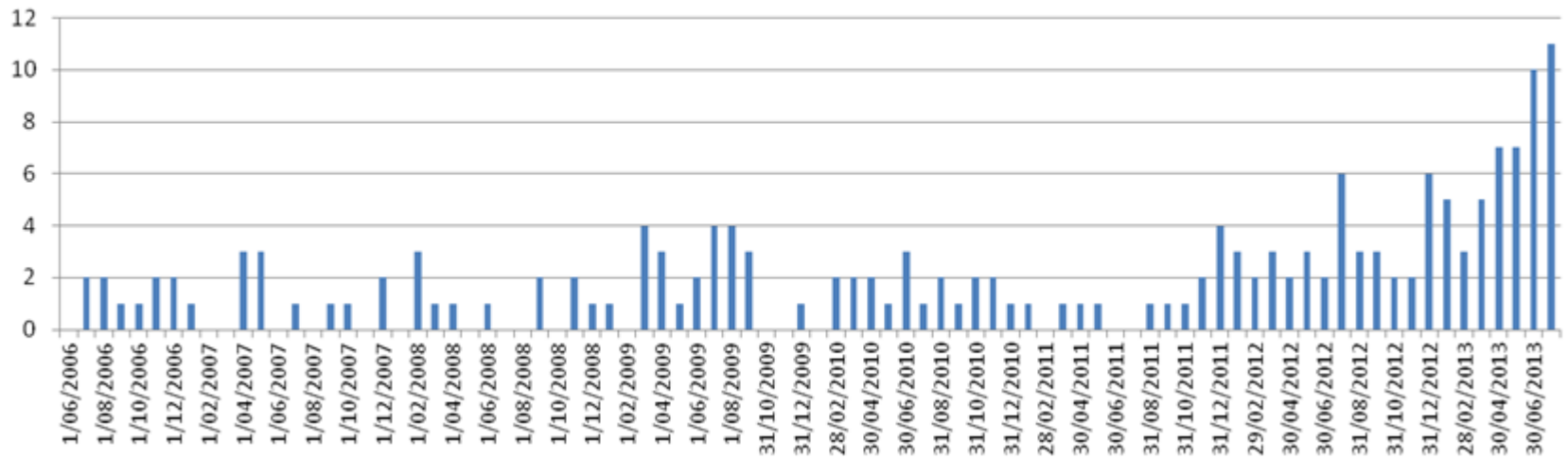
2. Observations and discussion

- New Demand for domains
- Withdrawn Demand for domains
- Net growth

3. plans? Further research ?

Introduction -

No. of Members with negative net growth



CENTR analysis - RECENT GROWTH TRENDS

prepared and presented by Matthew Zook, Ph.D. for the 50th CENTR GA, Brussels, October 2013

- CENTR asked Matthew Zook, Ph.D., to analyse 5 years of registration data
- February 2008 - August 2013
- New registrations, deleted domains
- Data on 39 ccTLDs

Questions ?

- Is growth in ccTLDs slowing down?
- Is there a specific moment when this slow down took place or has it been a graduate process since 2008?
- To what extend are these changes tied to new registrations or deletions/non-renewals?
- Comparable evolution in gTLDs?

Registries in report

CENTR provided ccTLDs: .at, .au, .be, .bg, .ca, .ch, .cn*, .cz, .de, .dk, .ee, .es, .eu, .fi, .fr, .hr, .il, .ir, .is, .it, .jp, .li, .lt, .lu, .lv, .me, .nl, .no, .nz, .pl, .pt, .rs, .ru, .pφ, .se, .si, .sk, .tr, .ua, and .uk

gTLDs: aero, .asia, .biz, .cat, .com, .coop, .info, .jobs, .mobi, .museum, .name, .net, .org, .post, .pro, .tel, .travel, .xxx

* Given its size and unique pattern of growth, the .cn registry is not included in the analysis and graphs unless otherwise noted.

Regional Definitions

Eastern Europe: .bg, .cz, .ee, .hr, .lt, .lv, .me, .pl, .rs, .ru, .pφ, .si, .sk, .tr, .ua

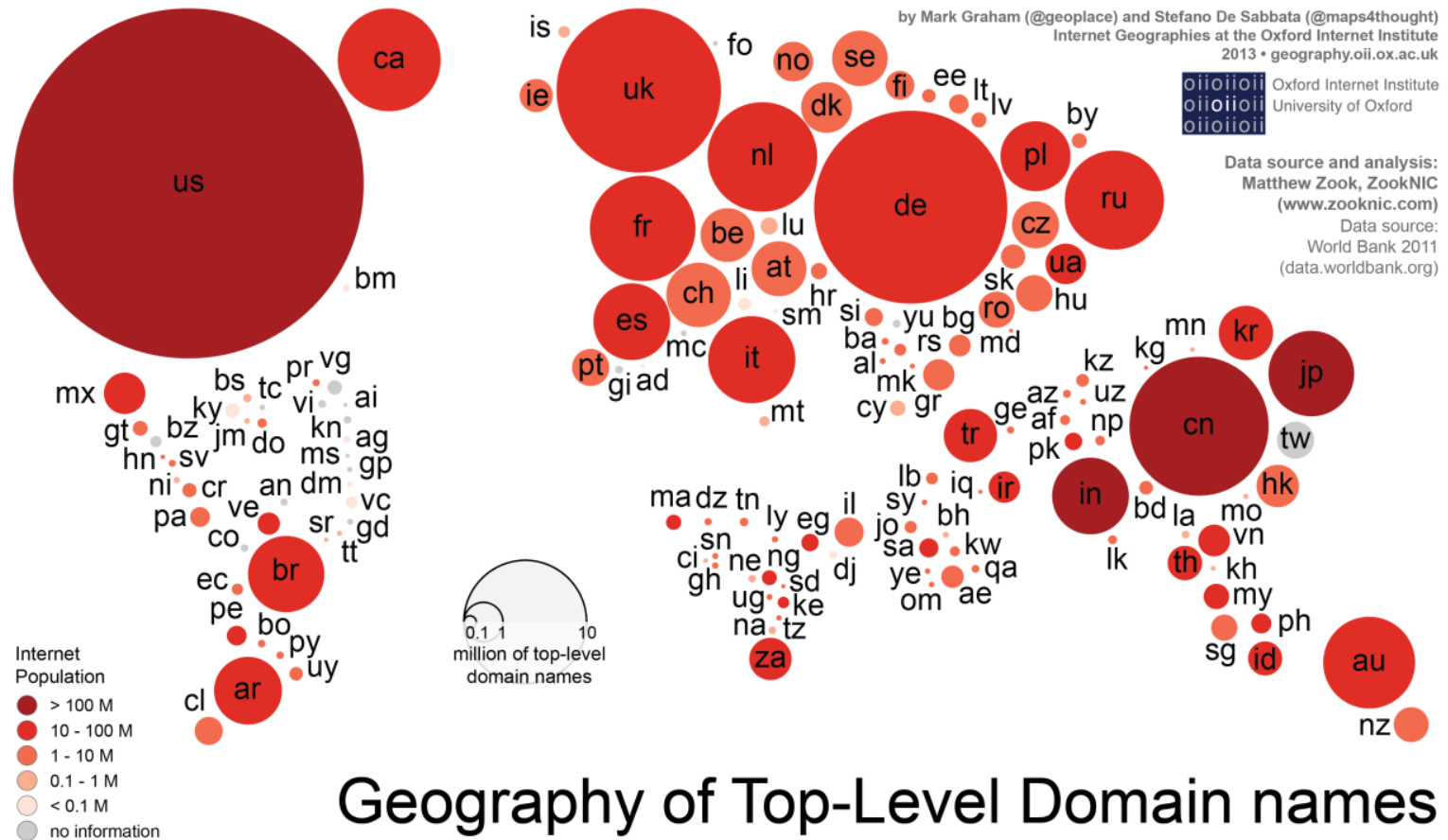
Western Europe: .at, .be, .ch, .de, .dk, .es, .eu, .fi, .fr, .is, .it, .li, .lu, .nl, .no, .pt, .se, .uk

Asia-Pacific: .au, .jp, .nz

Other: .ca, .il, .ir

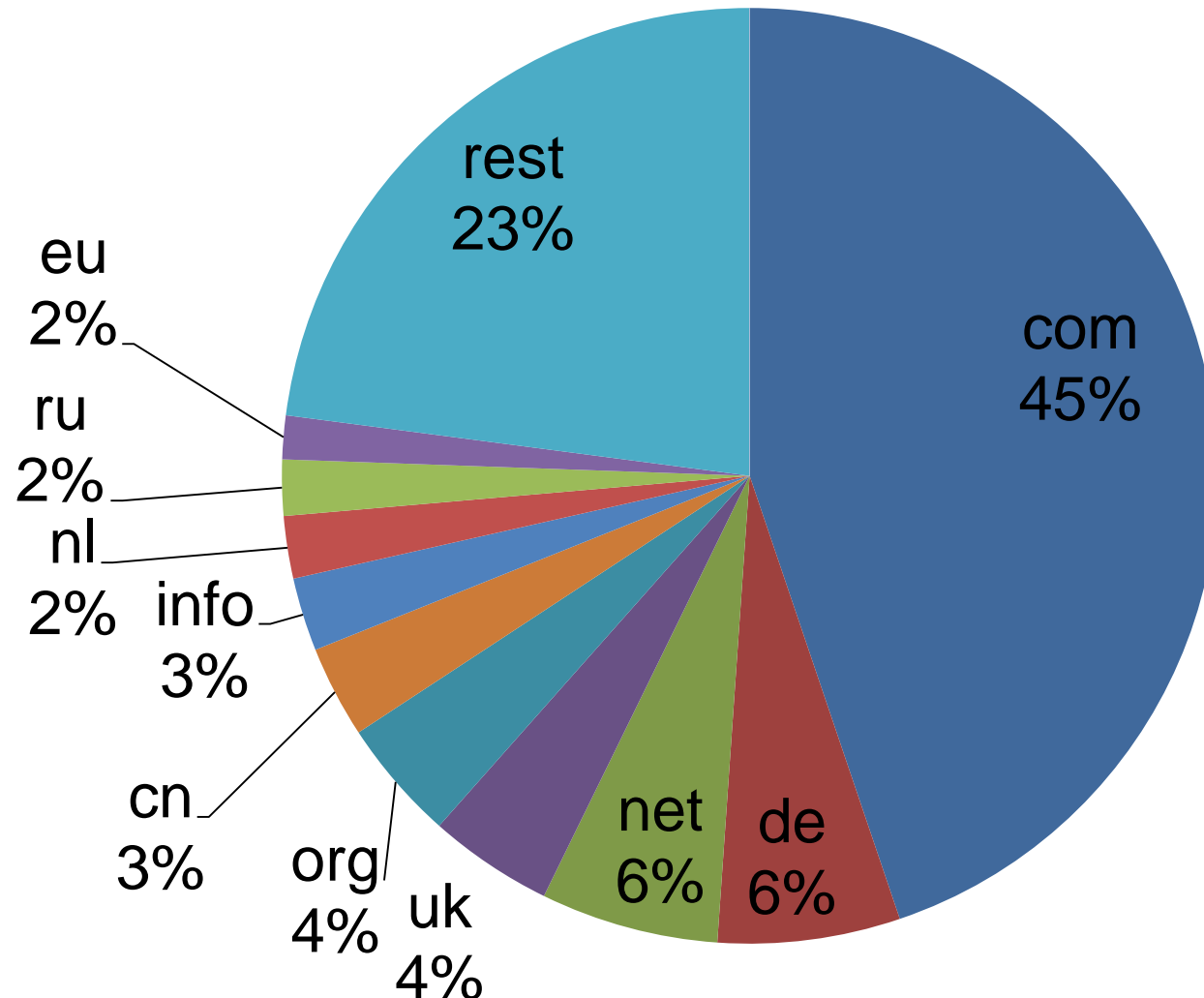
Industry overlook

gTLD and ccTLD Domains by Country(August 2013)



Distribution by TLD (August 2013)

246 Million Domains*



* Excludes .tk given its radically different business model. If included it would represent about 7 percent of all domains

Source: Recent growth trends within CENTR and gTLD registries, CENTR/ZookNic Oct 2013

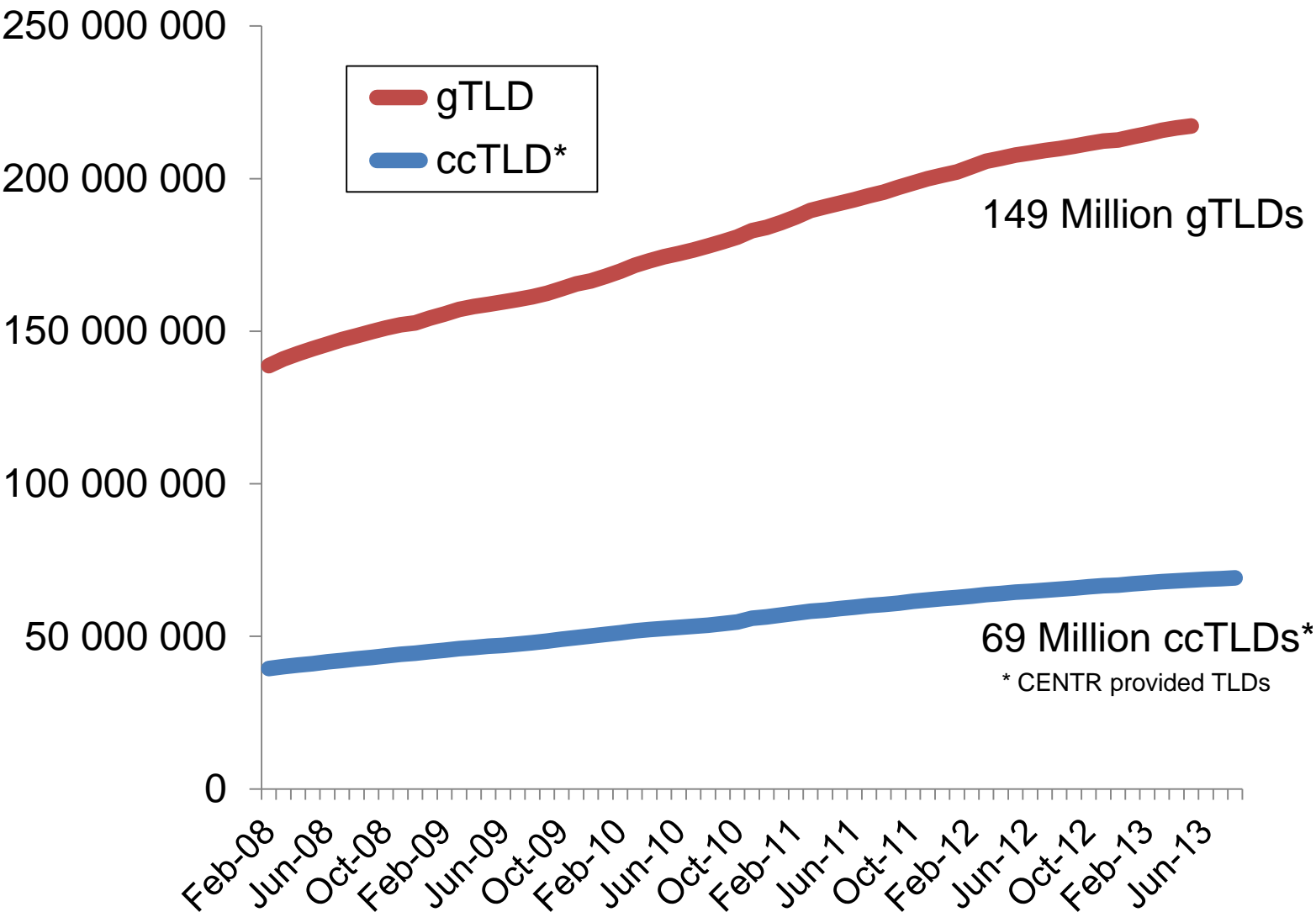


TLD Growth

- Slowdown in overall ccTLD growth since 2008
- Overall gTLDs increase slower than ccTLDs in last 5 years
- Higher growth in East European ccTLDs and midsize registries

Domain Growth, 2008-2013

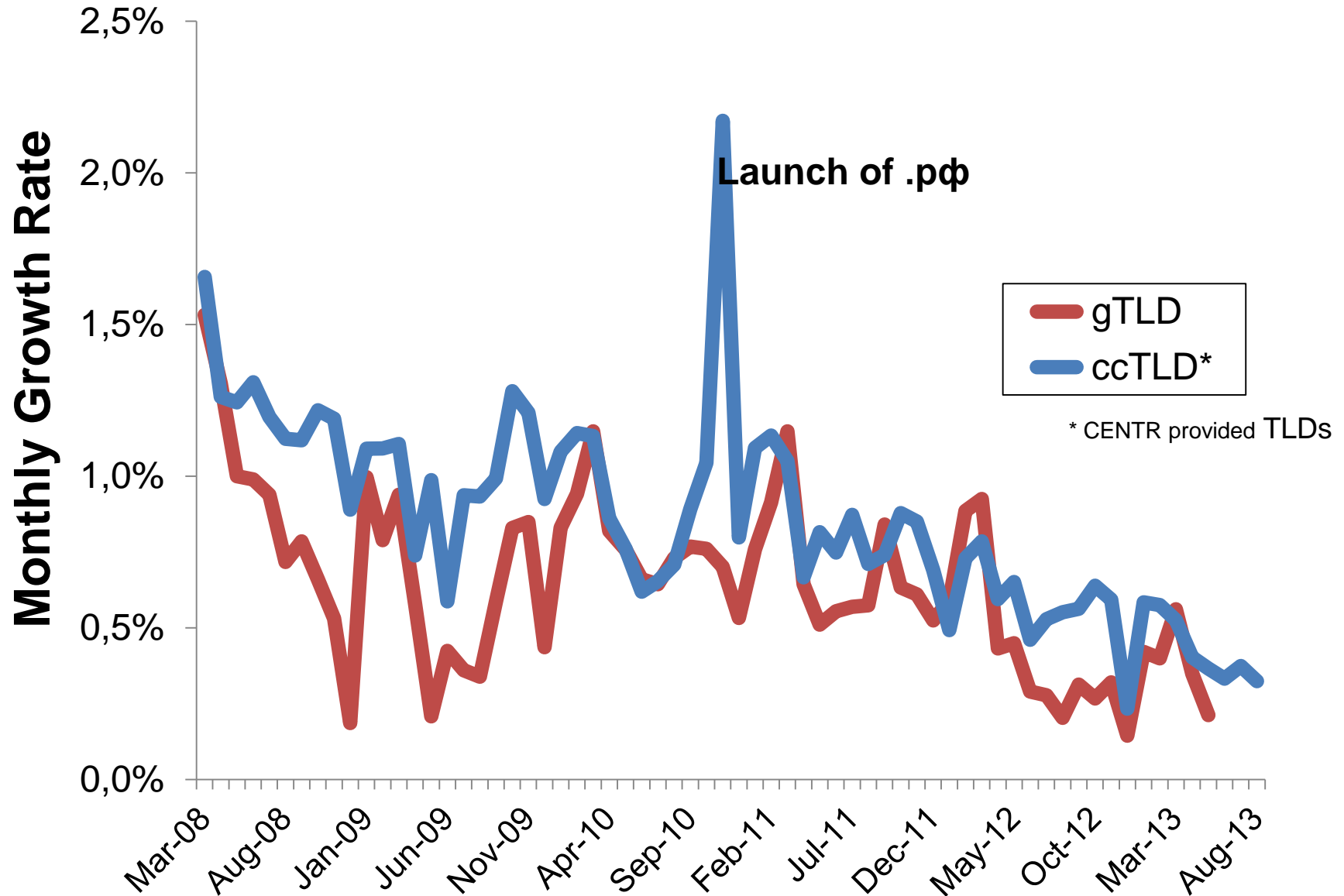
**218 Million Total
Domains in this study**
(89 % of all domains)



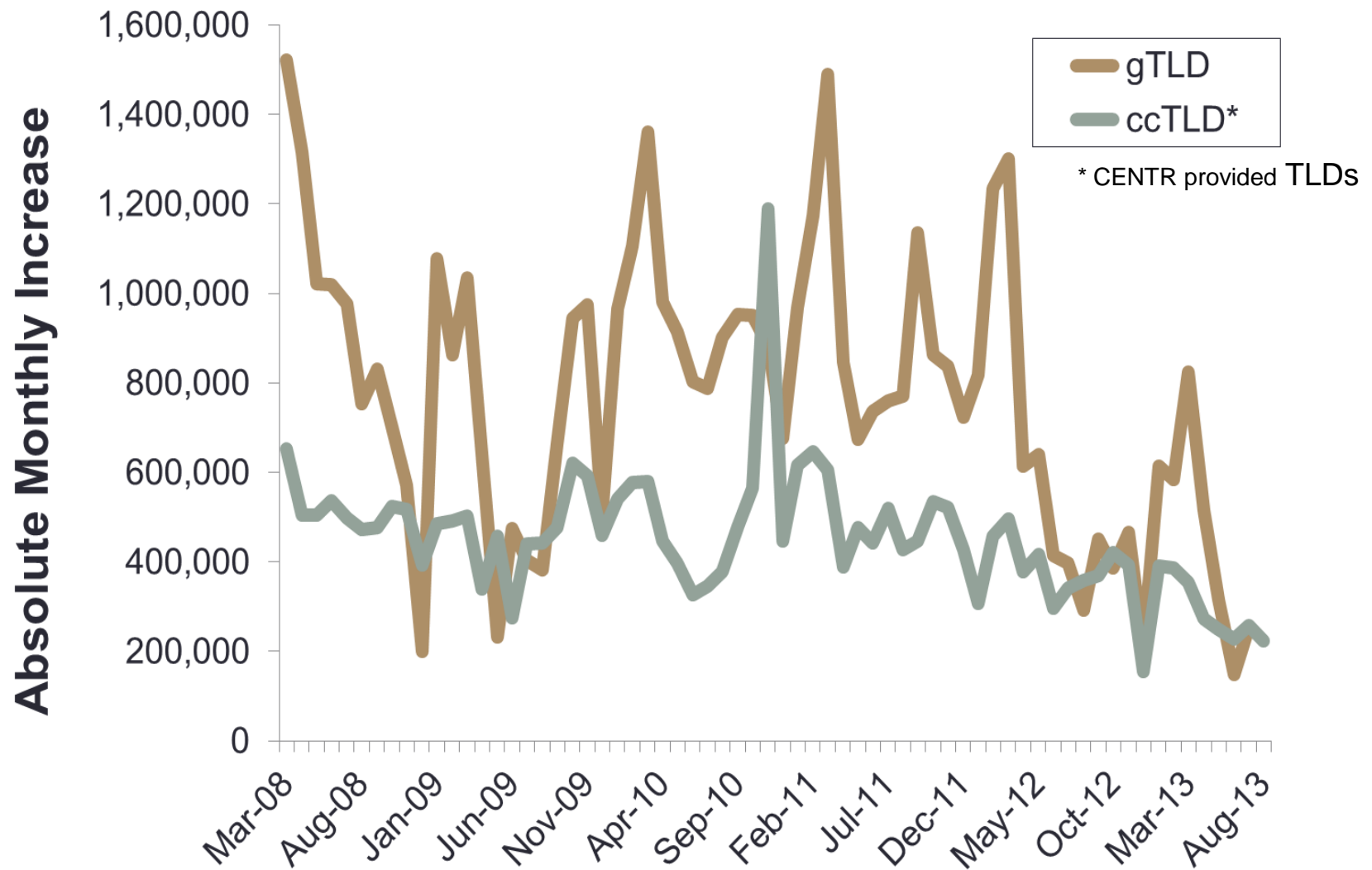
Source: Recent growth trends within CENTR and gTLD registries, CENTR/ZookNic Oct 2013



Monthly Growth Rate, gTLDs and ccTLDs*



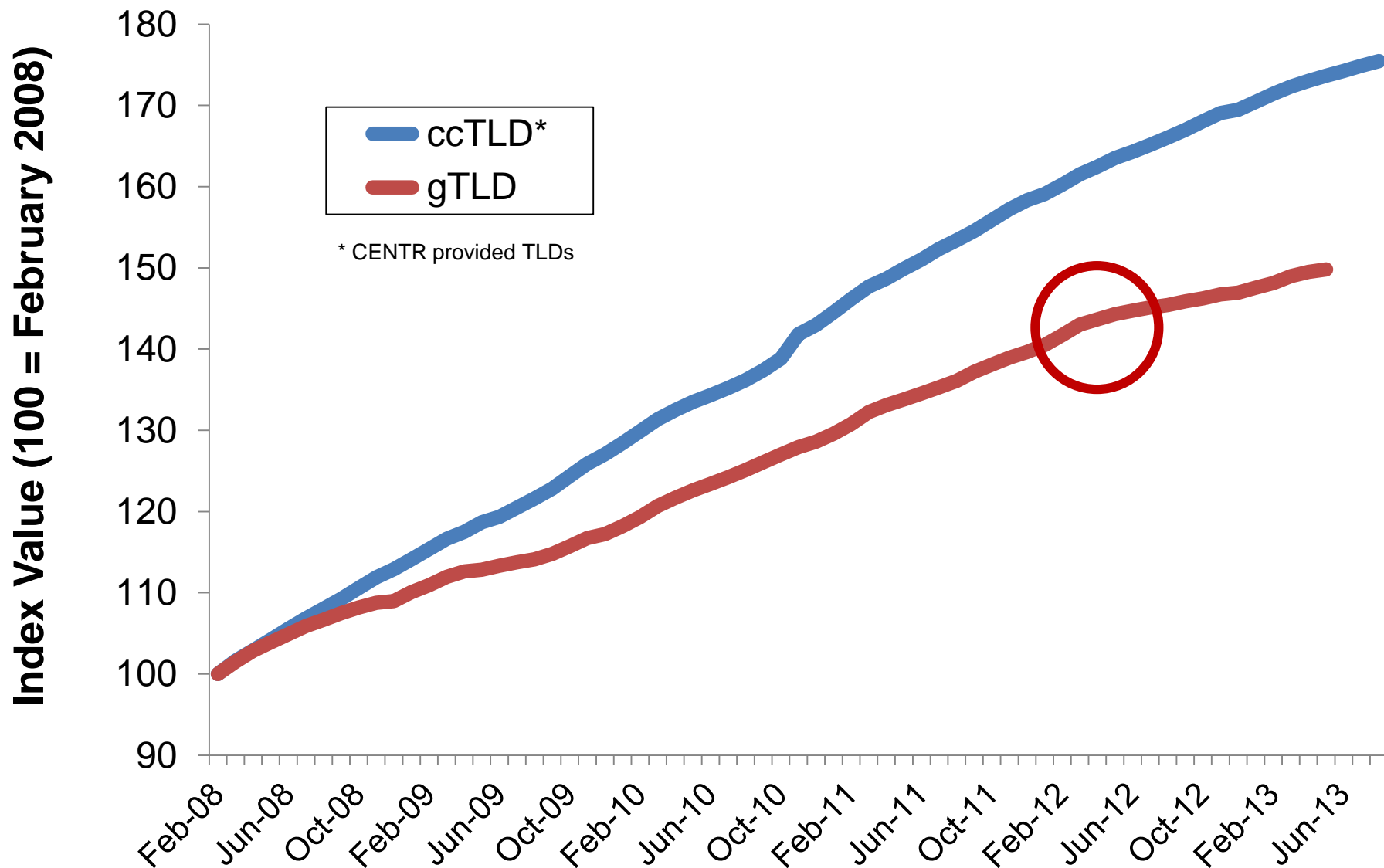
Absolute monthly increase, gTLDs and ccTLDs*



Source: Recent growth trends within CENTR and gTLD registries, CENTR/ZookNic Oct 2013



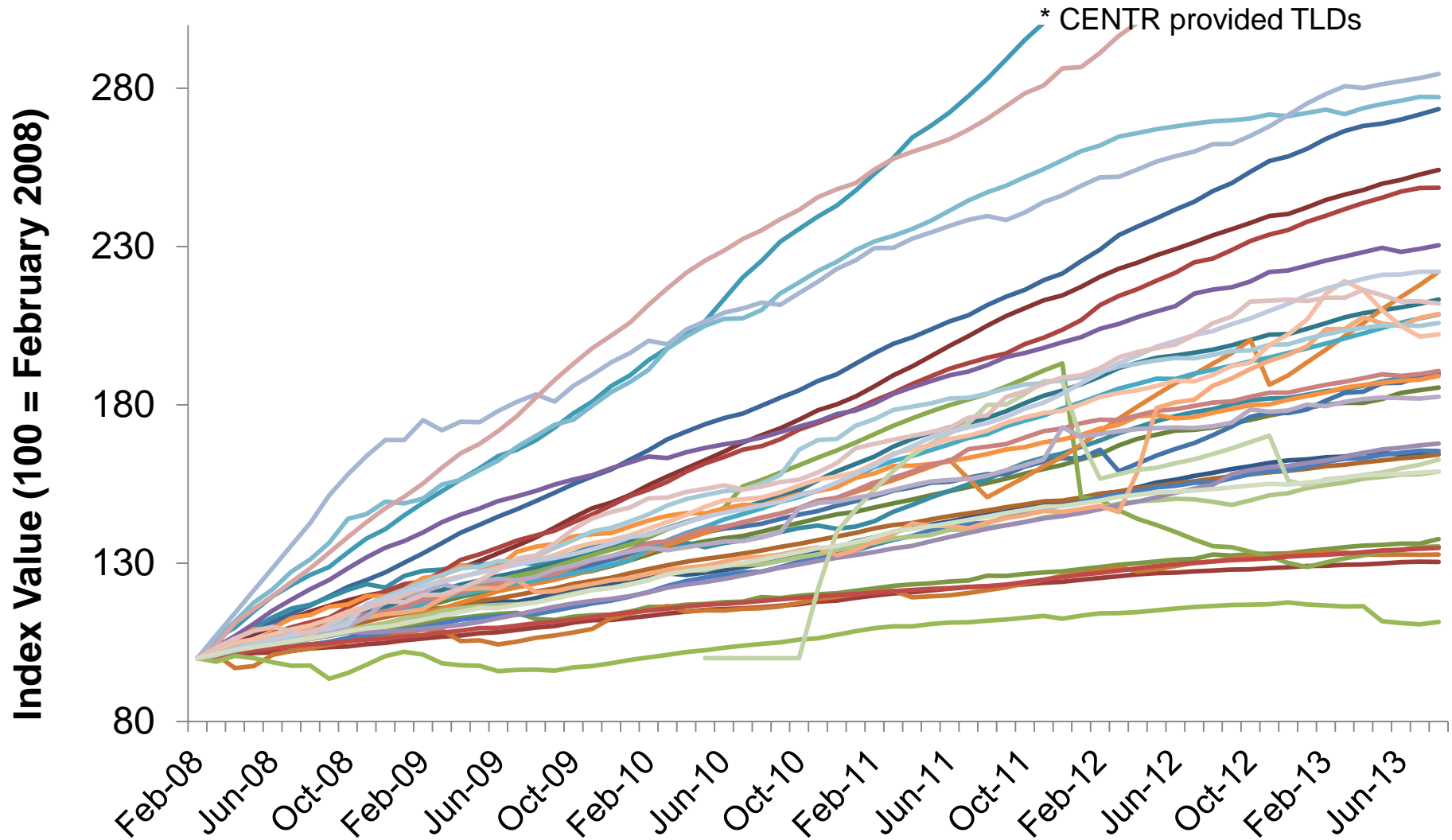
Indexed Growth, 2008-2013



Source: Recent growth trends within CENTR and gTLD registries, CENTR/ZookNic Oct 2013



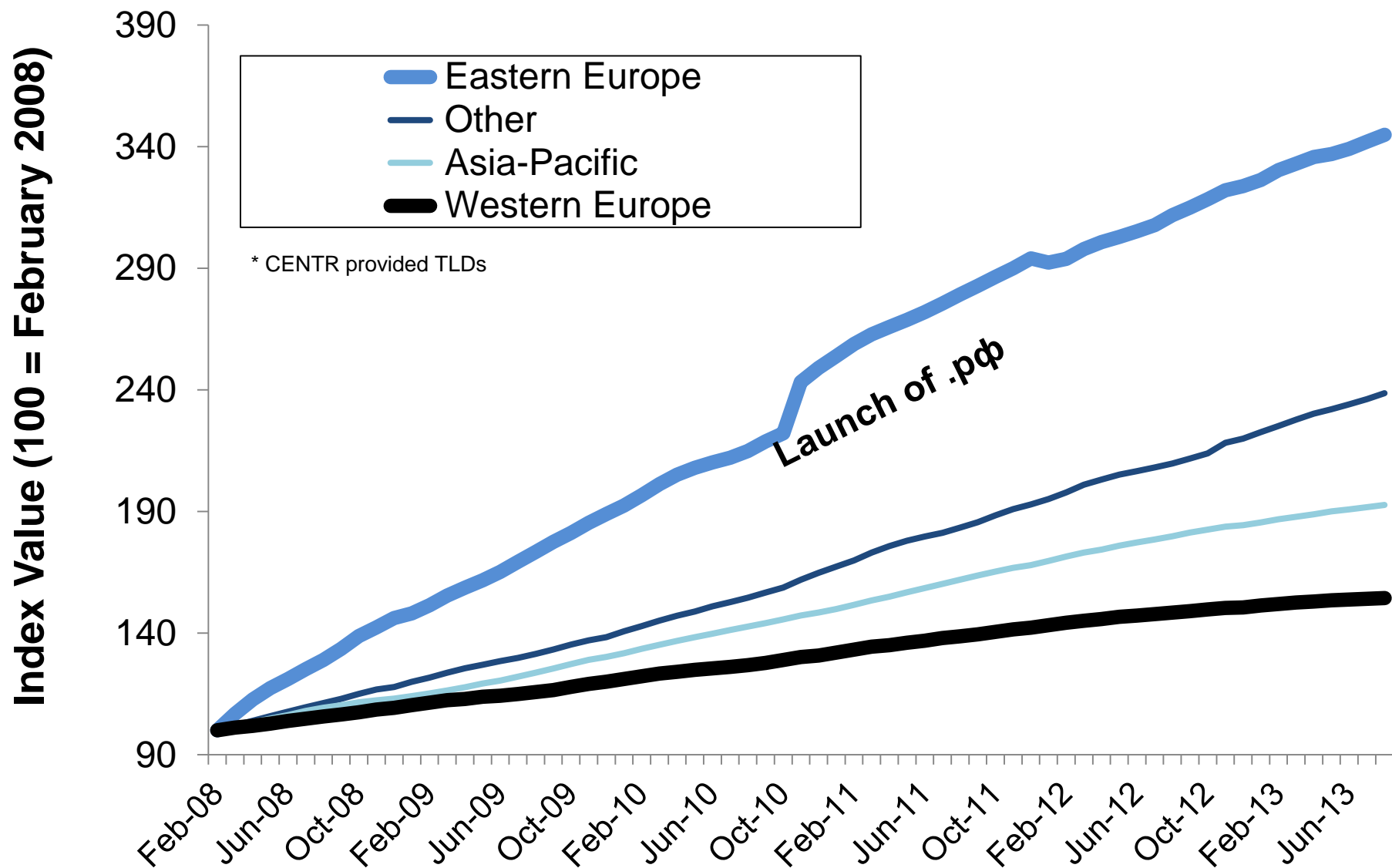
Indexed ccTLD* Growth, 2008-2013



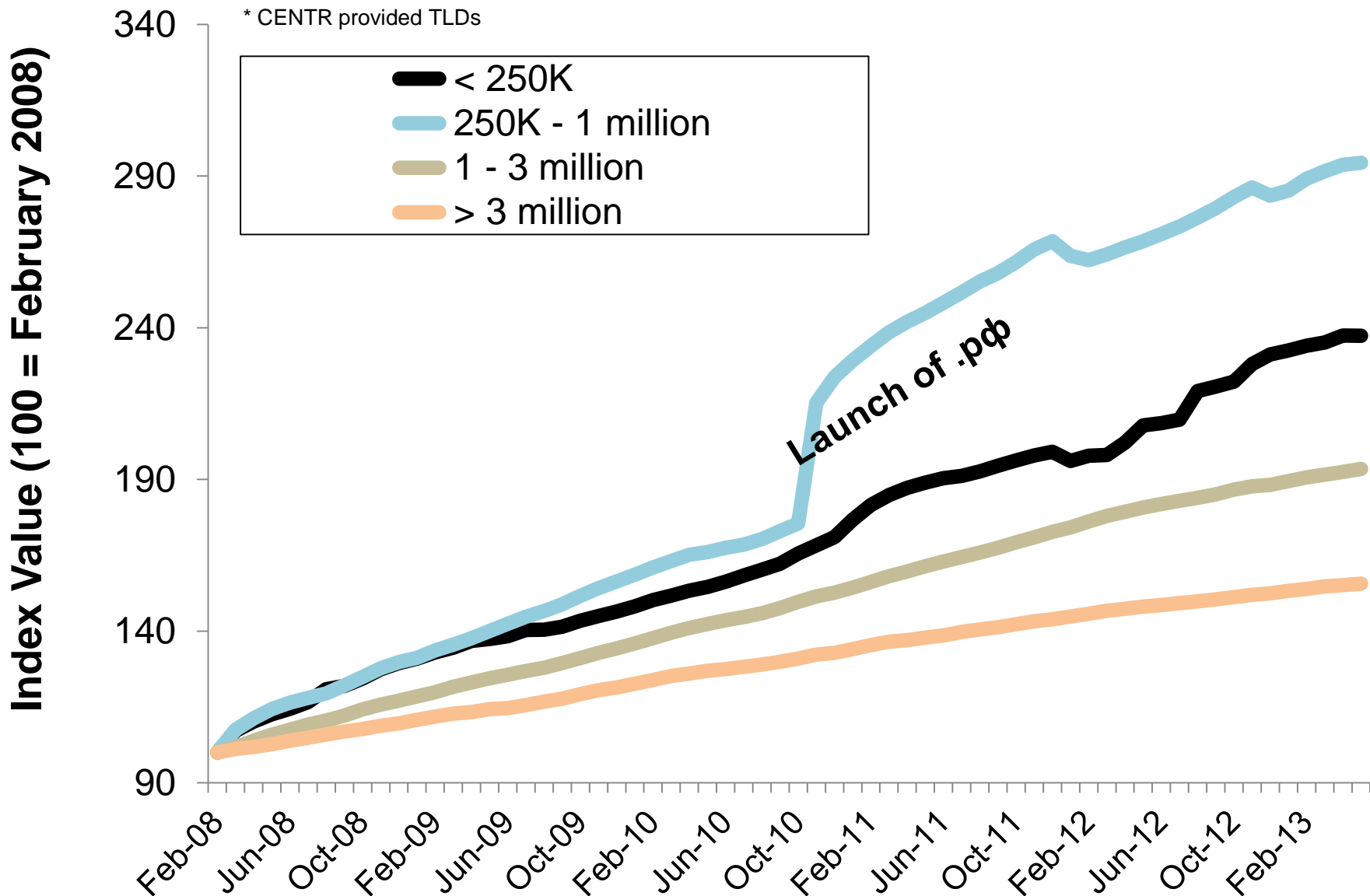
Source: Recent growth trends within CENTR and gTLD registries, CENTR/ZookNic Oct 2013



Indexed ccTLD* Growth, Regions



ccTLD* Indexed Growth, Registry Size



TLD Growth

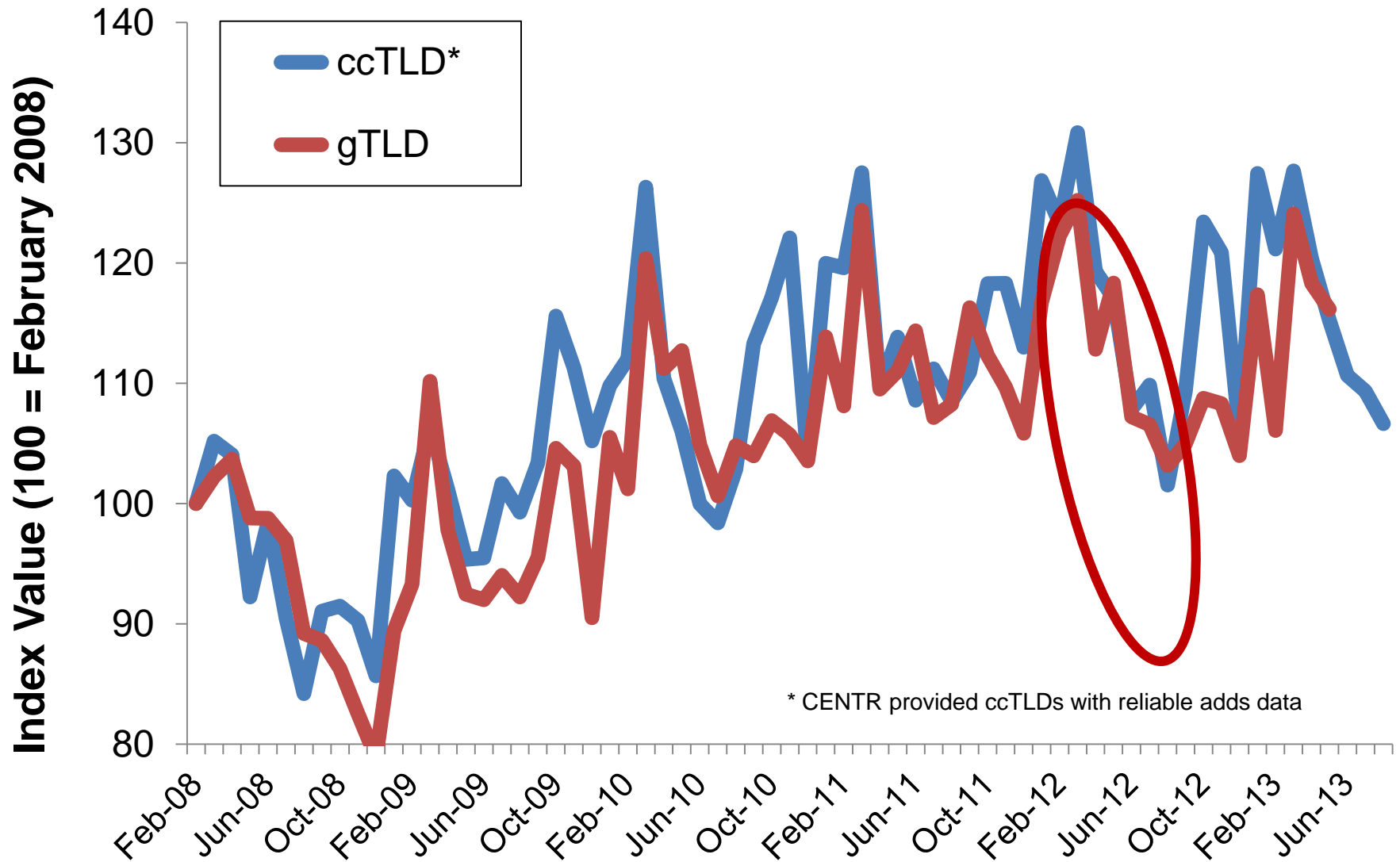
- Slowdown in overall ccTLD growth since 2008
- Overall gTLDs increase slower than ccTLDs in last 5 years
- Higher growth in East European ccTLDs and midsize registries

Comments ?

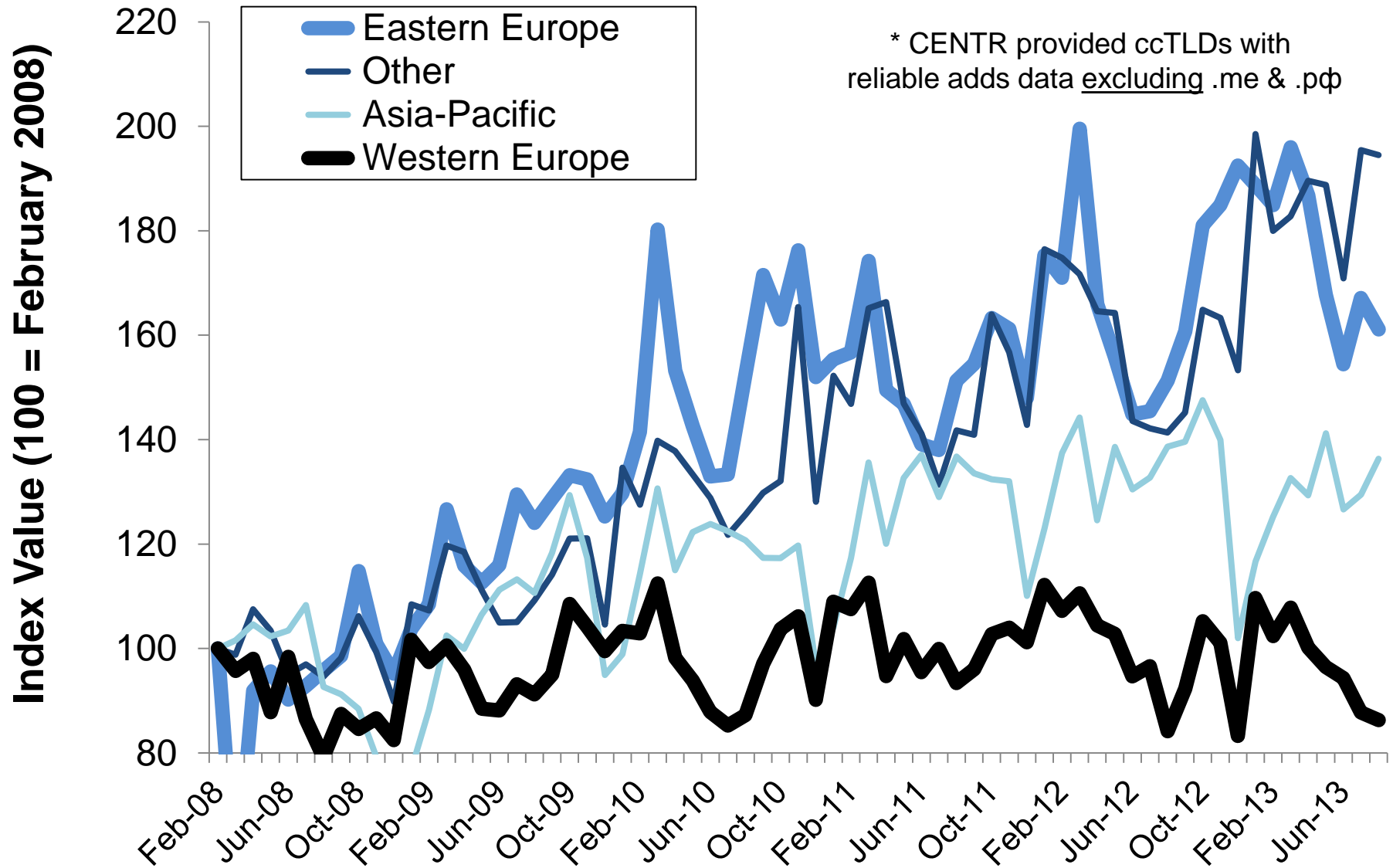
New registrations

- Correlated with macro-economic trends (eg 2008 financial crisis)
- Relative flat demand for Western European and/or larger TLDs
- Relative large increase for Eastern European and mid-sized TLDs
- January 2012 turning point ?

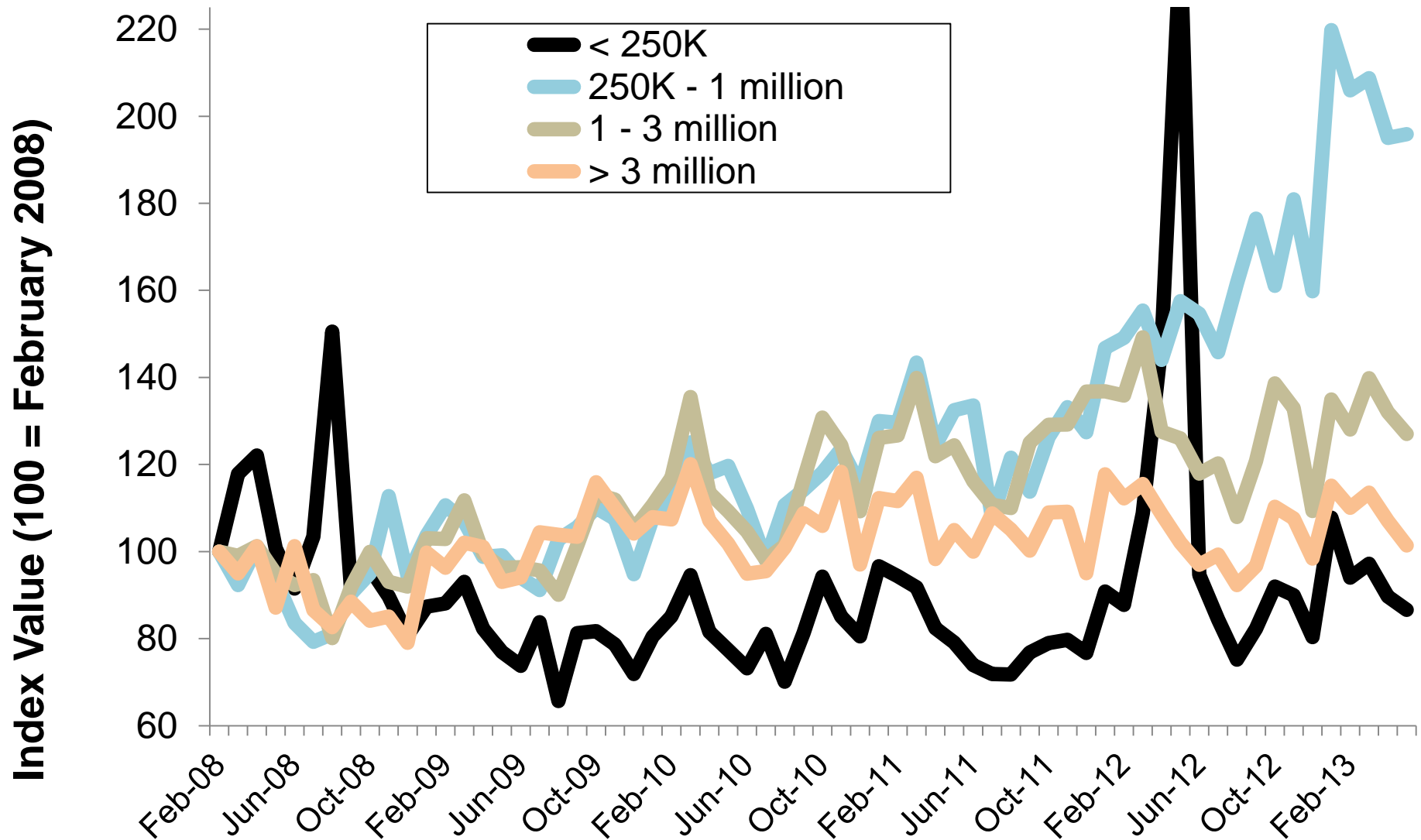
Indexed New Domains, 2008-2013



ccTLD* Indexed New Domains, Regions



ccTLD* Indexed New Domains, Registry Size

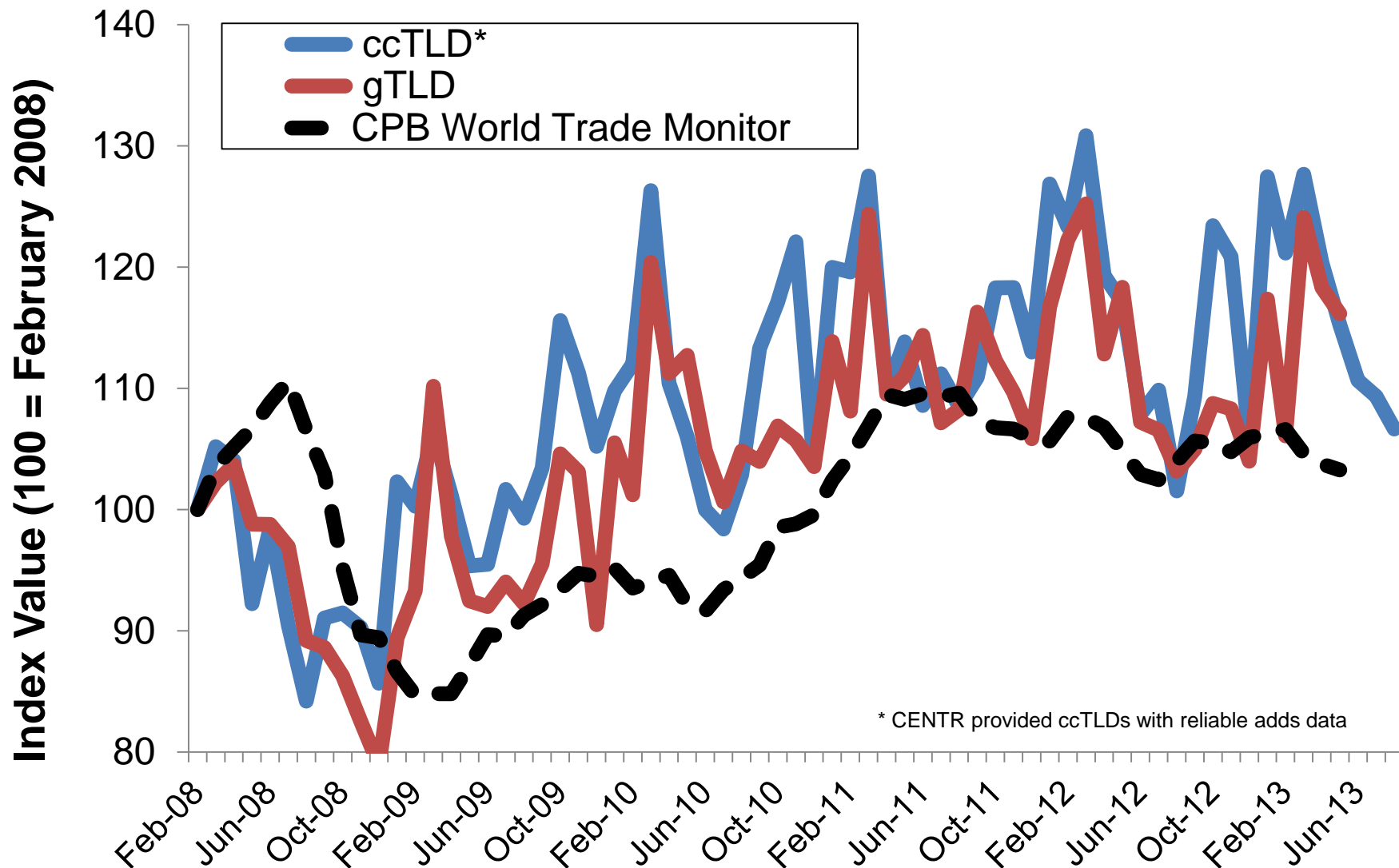


* CENTR provided ccTLDs with reliable adds data excluding .me & .ppp

Source: Recent growth trends within CENTR and gTLD registries, CENTR/ZookNic Oct 2013

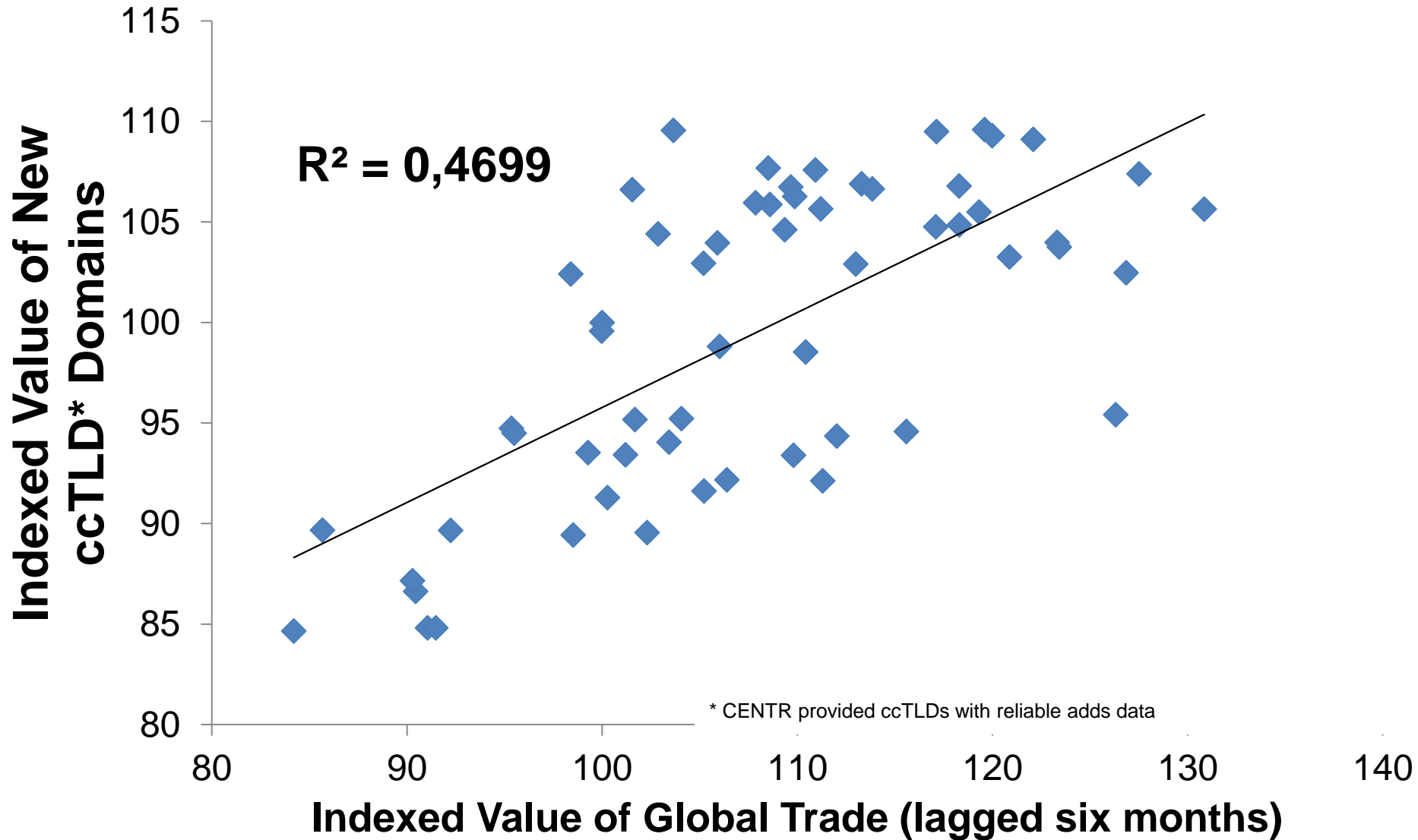


Indexed New Domains, 2008-2013



* CENTR provided ccTLDs with reliable adds data

New ccTLD registrations* vs. Global Trade



Source: Recent growth trends within CENTR and gTLD registries, CENTR/ZookNic Oct 2013



Discussion

New registrations

- Correlated with macro-economic trends (eg 2008 financial crisis)
- Relative flat demand for Western European and/or larger TLDs
- Relative large increase for Eastern European and mid-sized TLDs
- January 2012 turning point ?

What about your local market ?

Similarities ? Differences ?

Prognosis?

January 2012, your explanation?

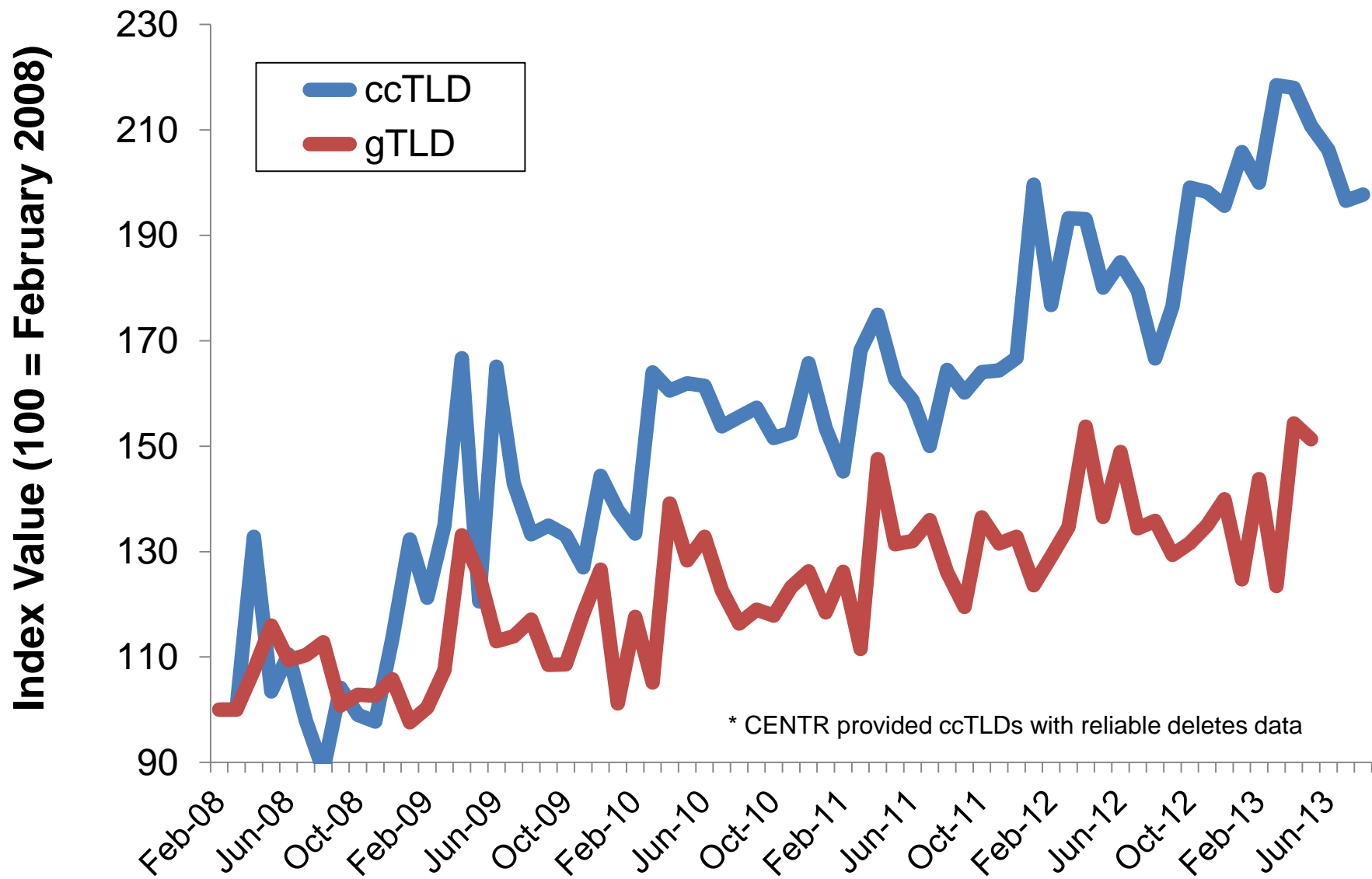
How do you react?

Actions? Decisions ?

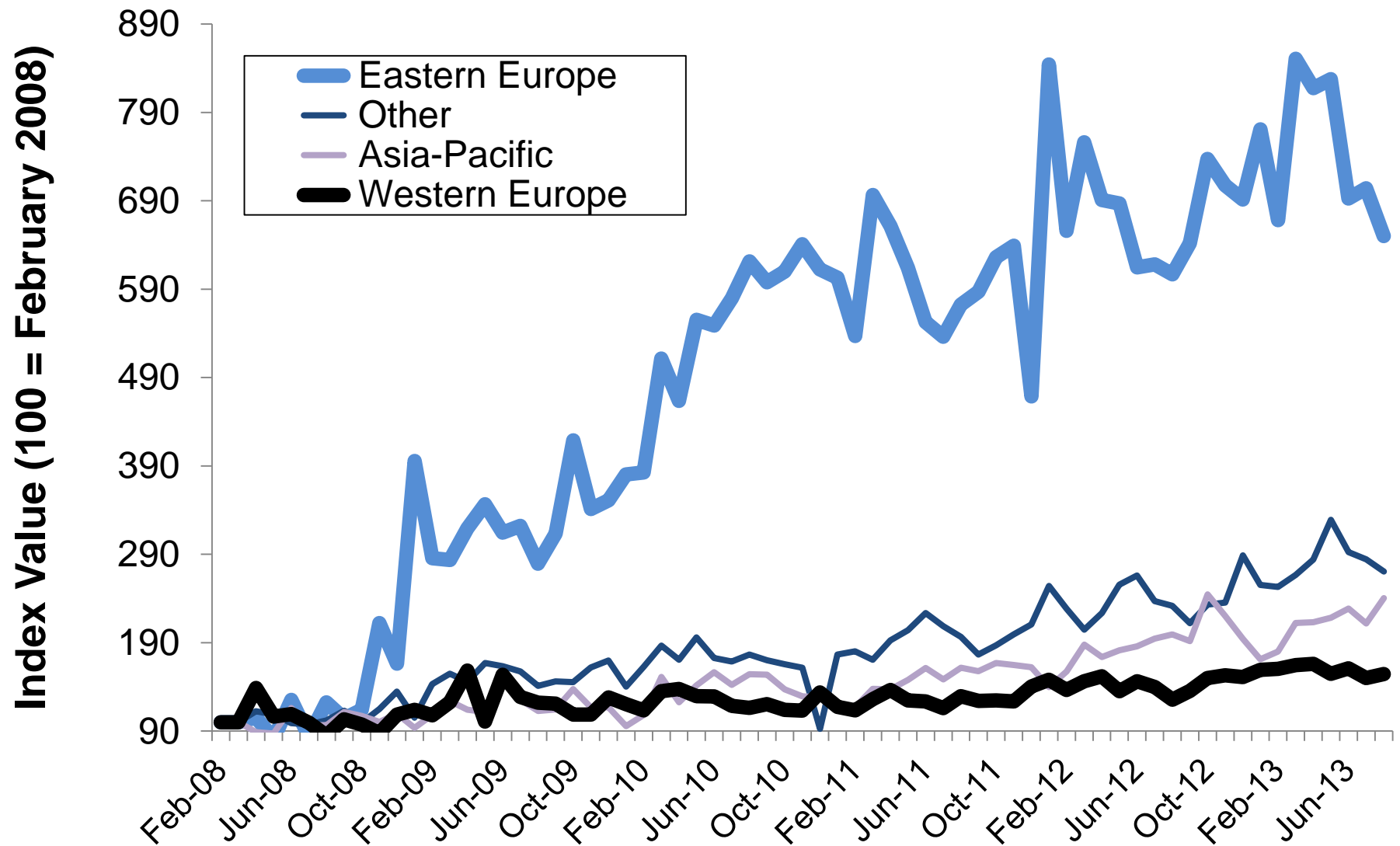
Deleted domain names (non-renewals)

- Increase of deletions faster than increase of new registrations
- Increase of deletions larger in ccTLDs than in gTLDs

Indexed Deleted Domains



ccTLD* Indexed Deleted Domains, Regions



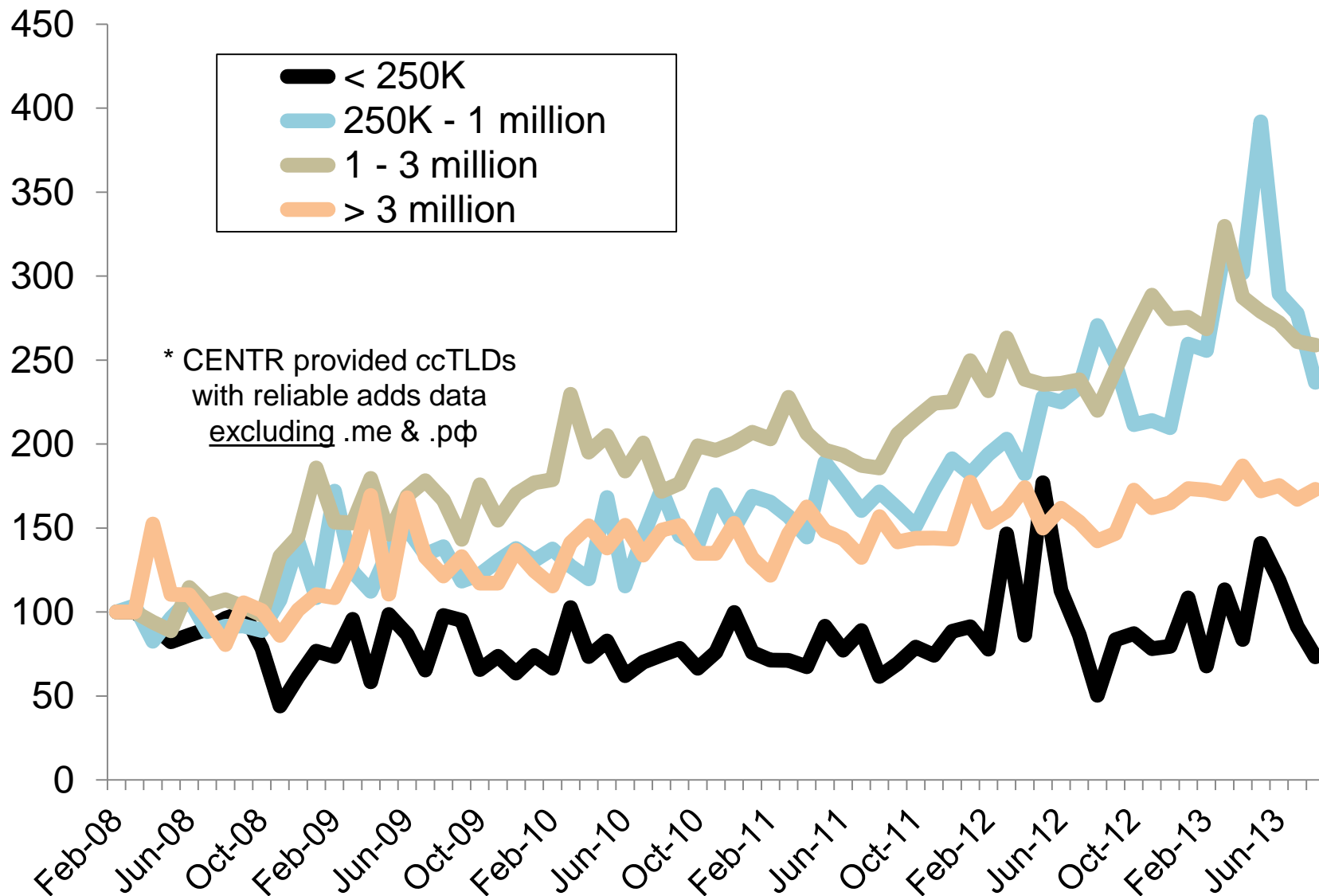
* CENTR provided ccTLDs with reliable deletes data excluding .me & .pp

Source: Recent growth trends within CENTR and gTLD registries, CENTR/ZookNic Oct 2013



ccTLD* Indexed Deleted Domains, Registry Size

Index Value (100 = February 2008)



Deleted domain names (non-renewals)

- Increase of deletions faster than increase of new registrations
- Increase of deletions larger in ccTLDs than in gTLDs

What about your local market ?

Similarities ? Differences ?

Prognosis?

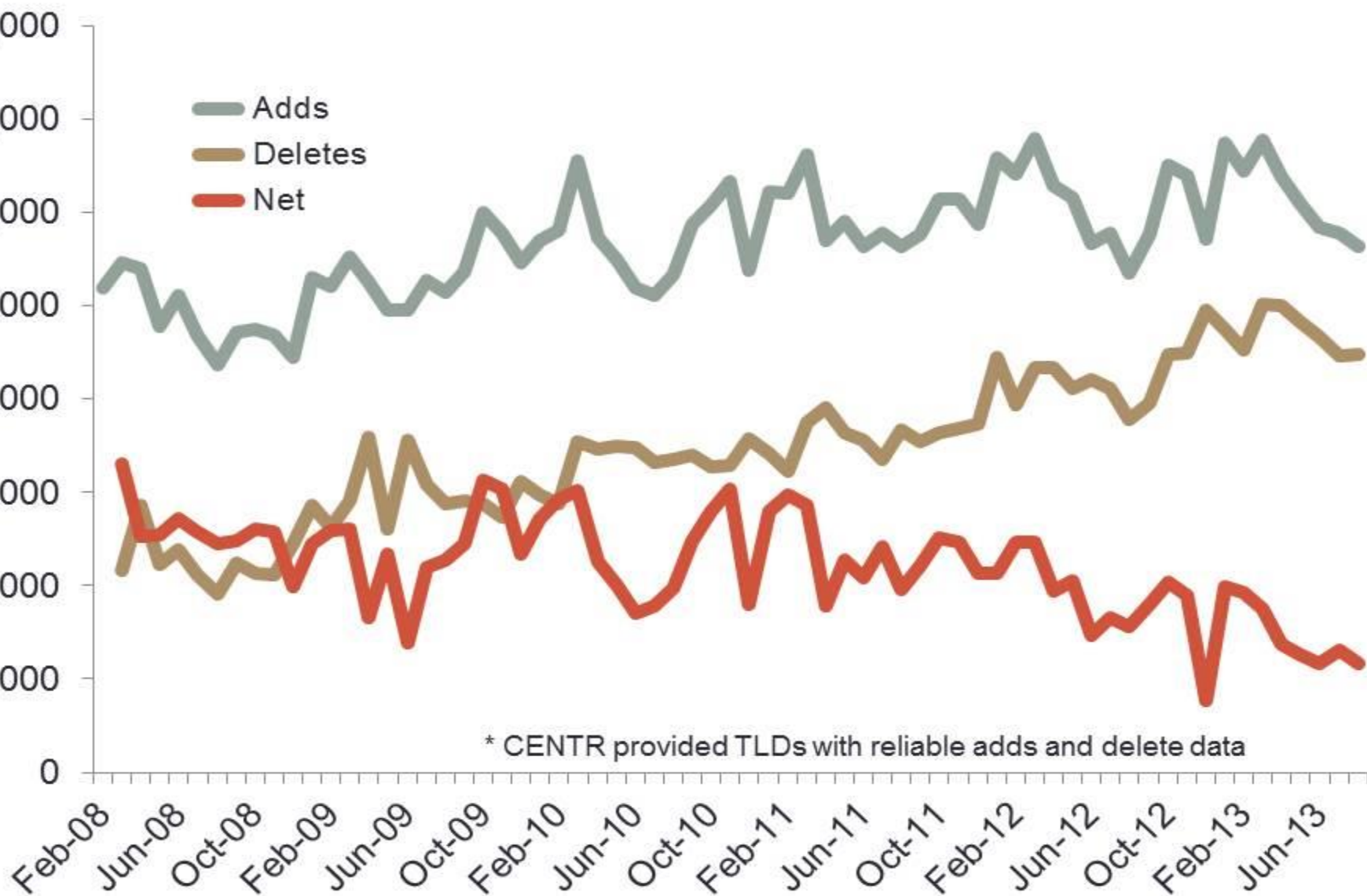
How do you react?

Actions? Decisions ?

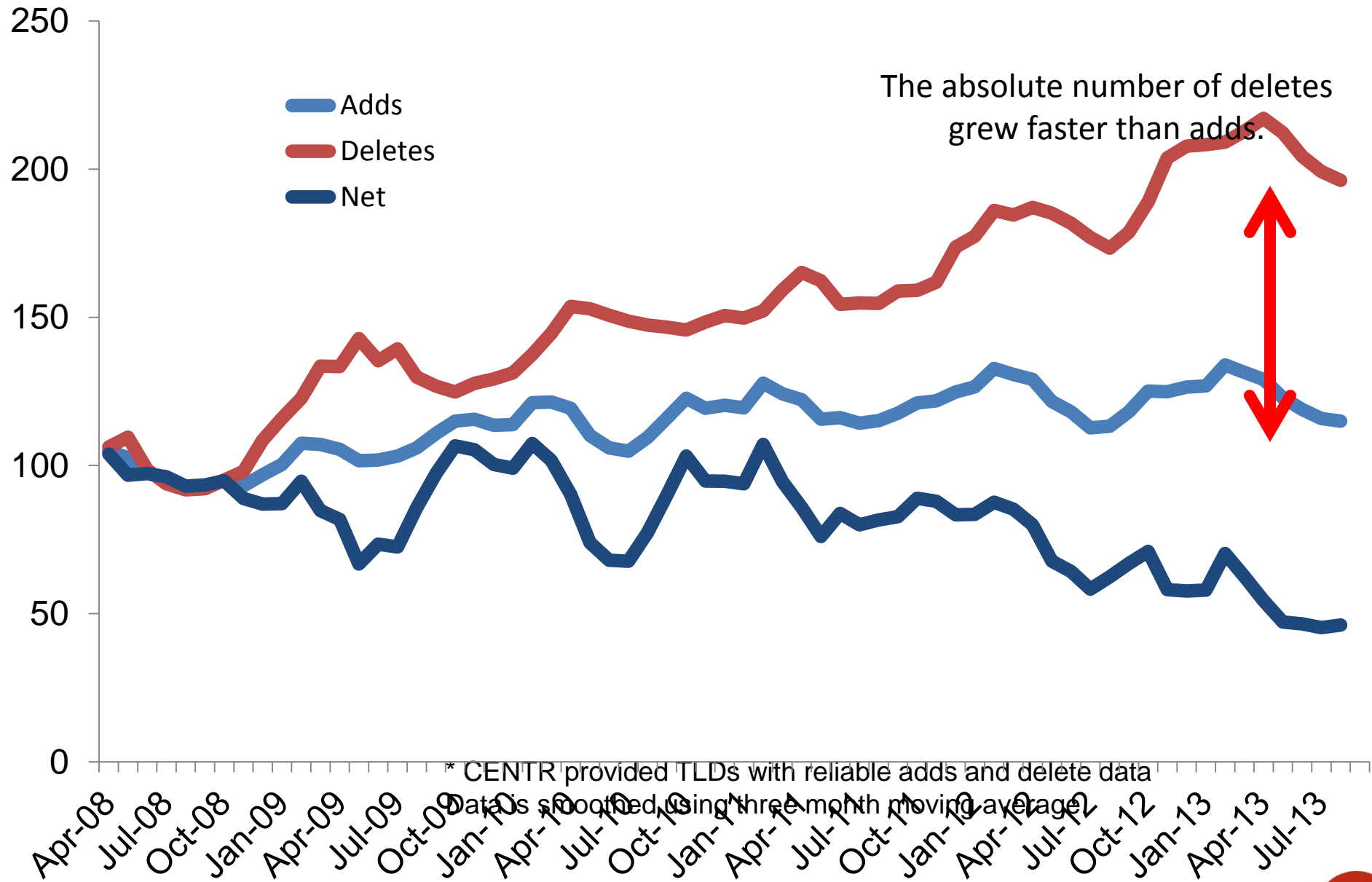
Net new registrations

- Net new domains steadily decreased since 2008
- Rough parity between gTLDs and ccTLDs
- .com remains one of the strongest TLDs for new domains
- Western Europe and/or larger TLDs exhibit slower relative and absolute growth

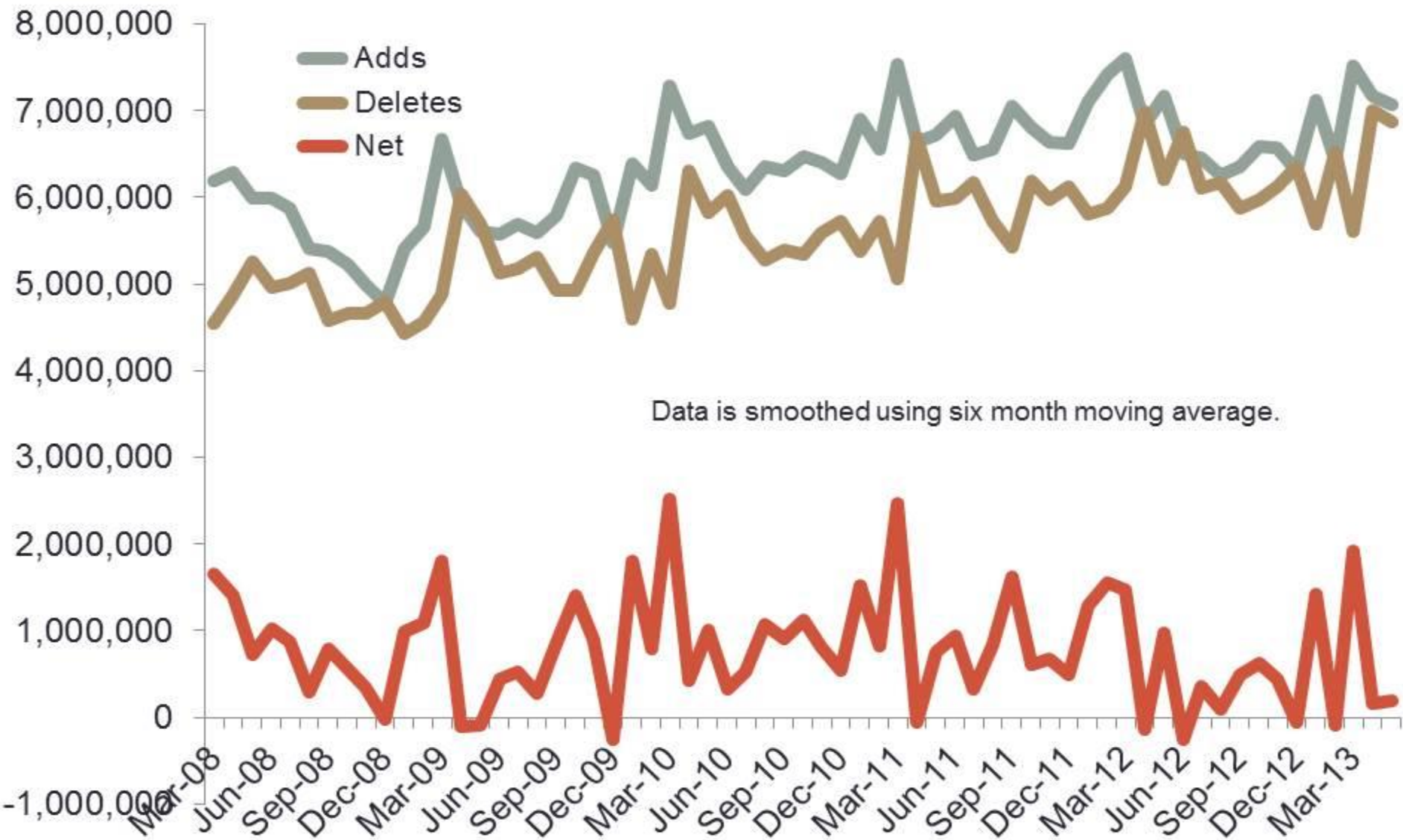
NET NEW DOMAINS - CENTR ccTLDs*



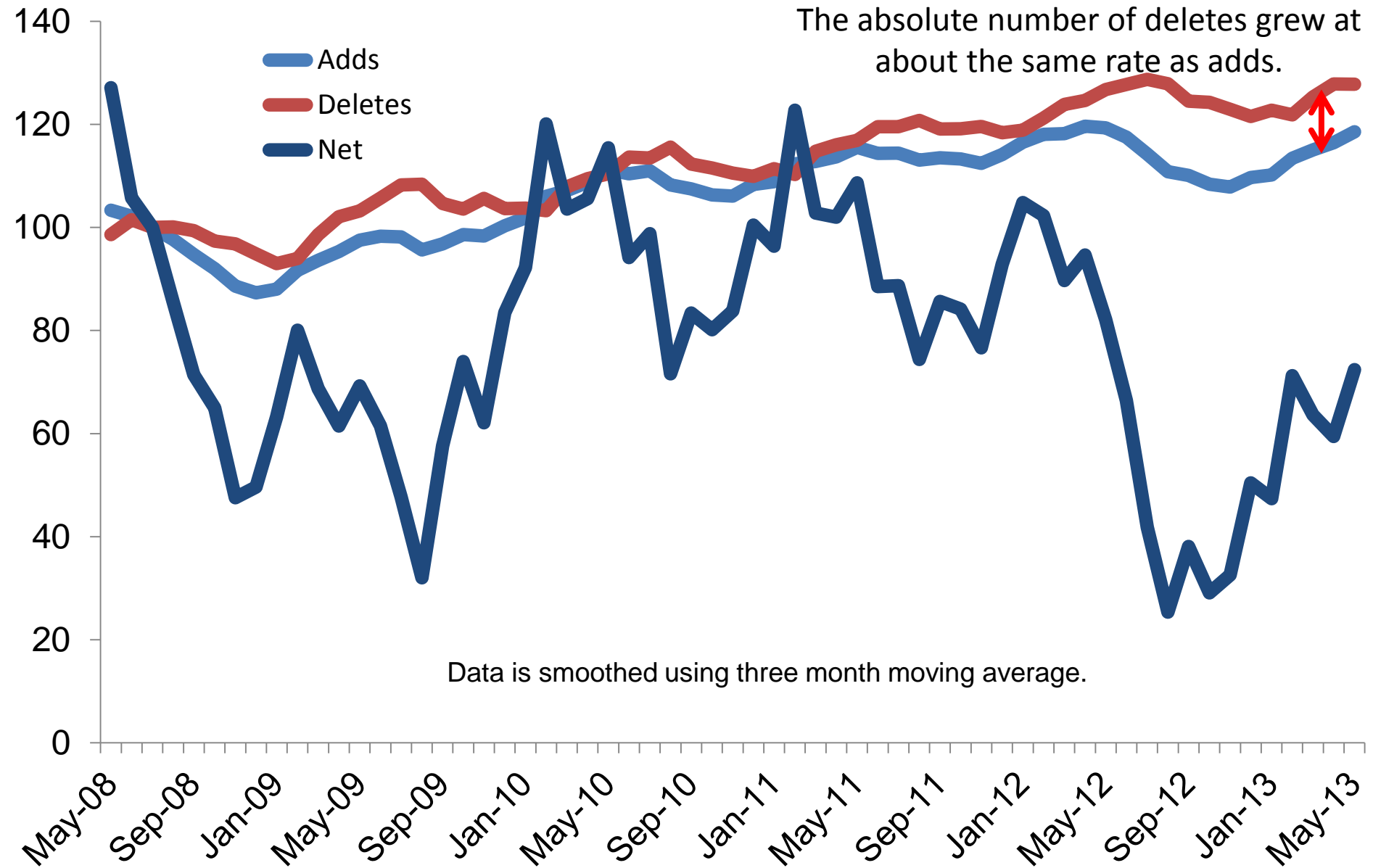
NET NEW INDEX - CENTR ccTLDs*



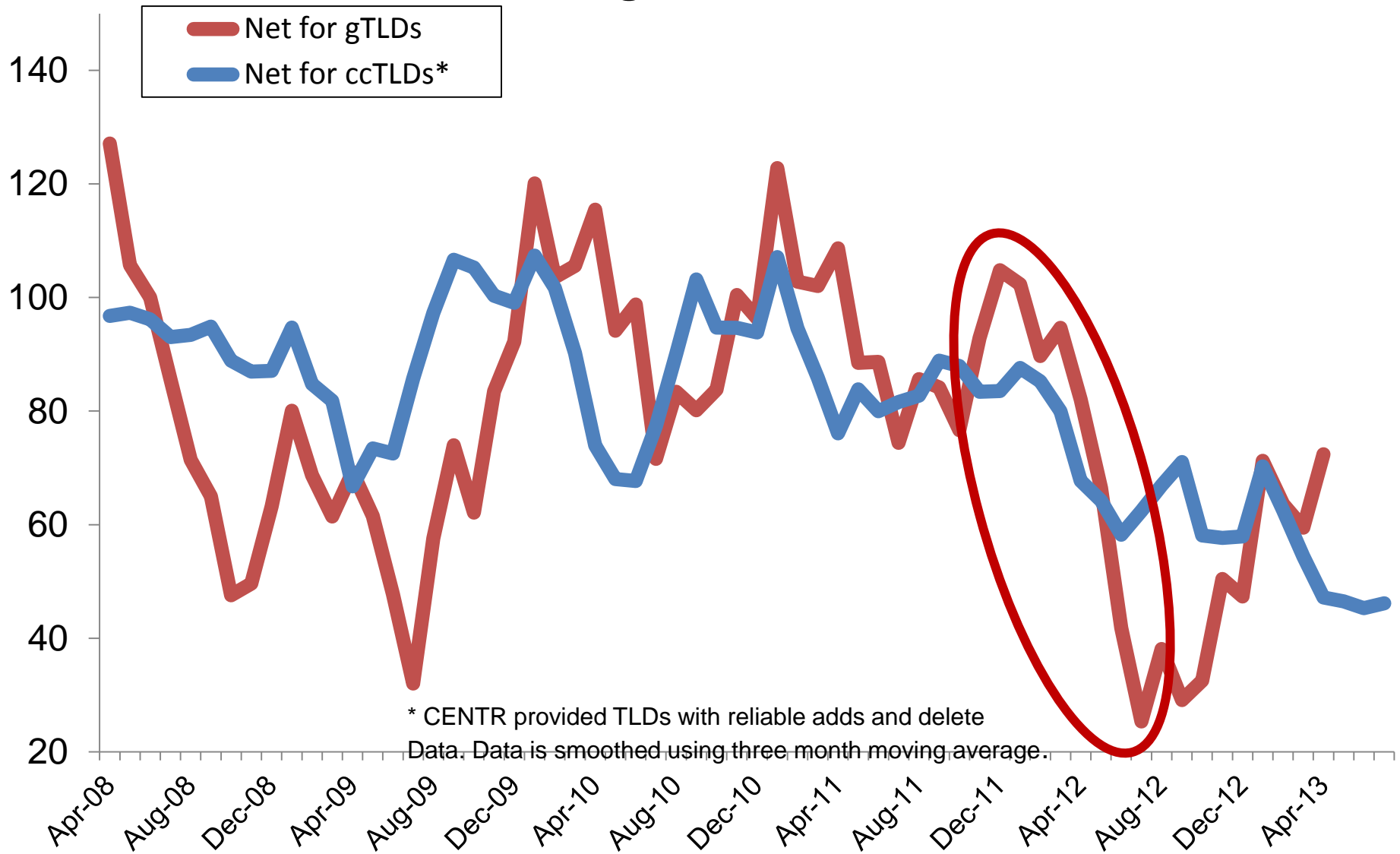
NET NEW DOMAINS - gTLDs



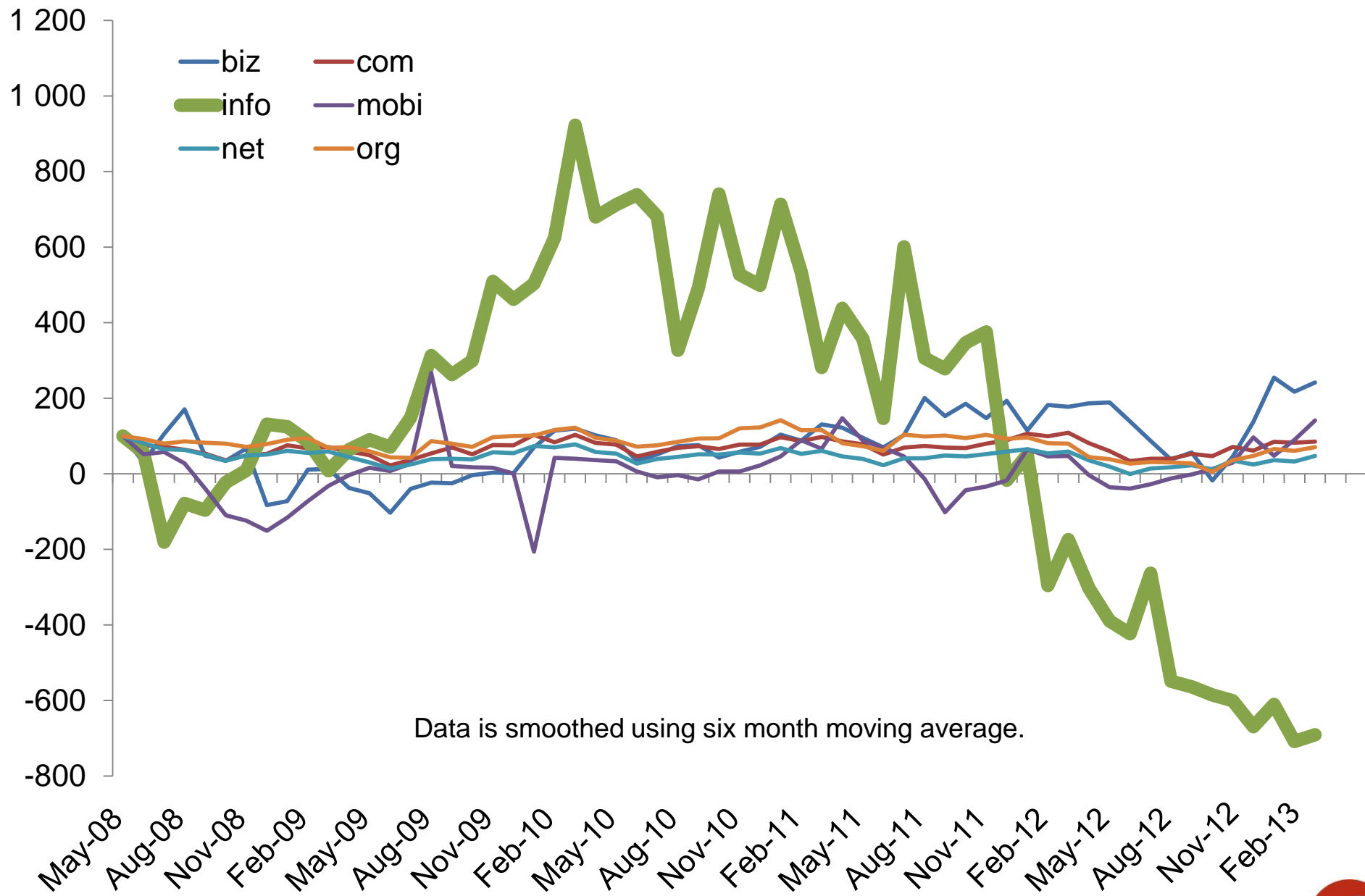
NET NEW INDEX - gTLDs



NET NEW INDEX - gTLDs and CENTR ccTLDs*

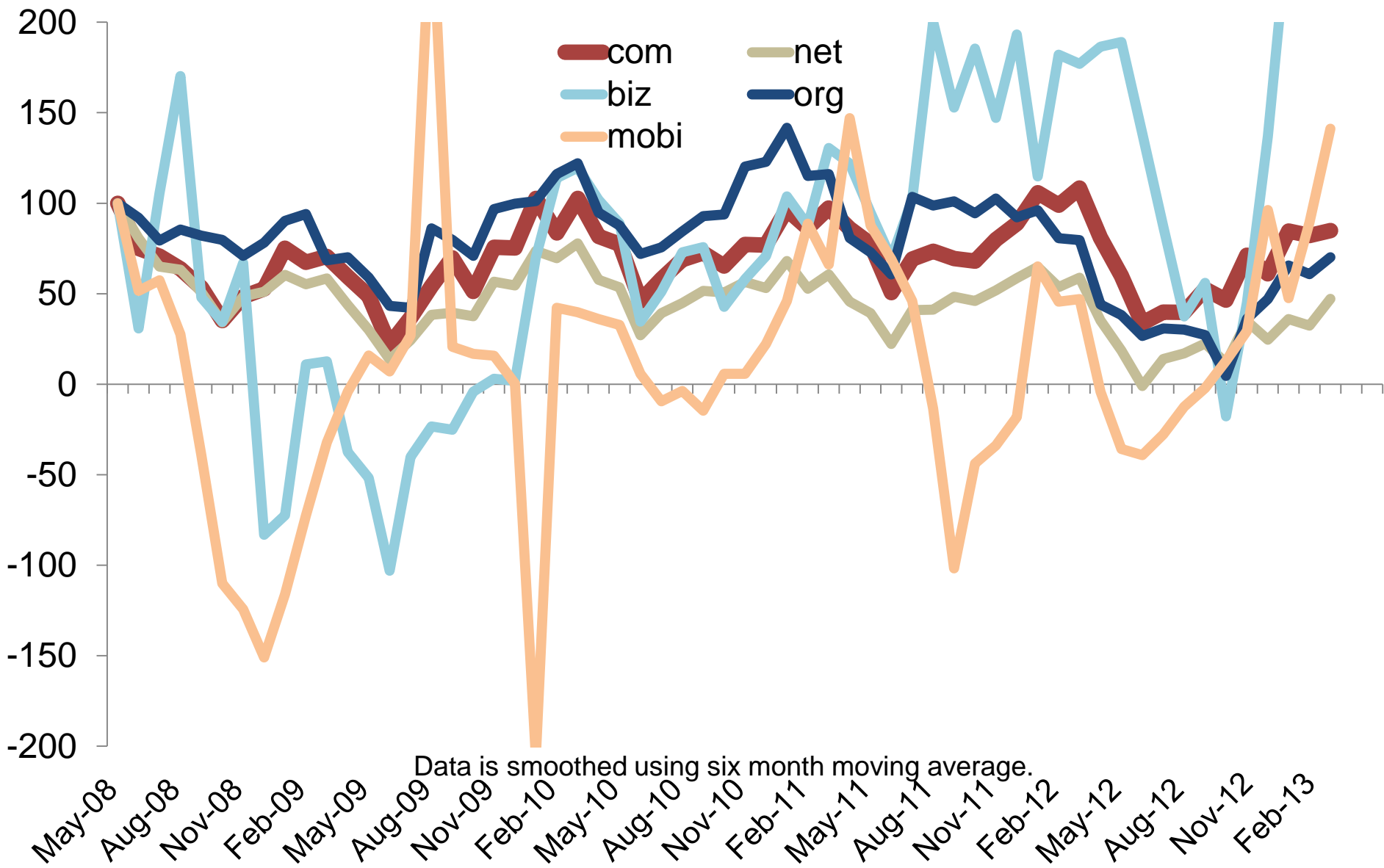


NET NEW INDEX – gTLDs and .info



Data is smoothed using six month moving average.

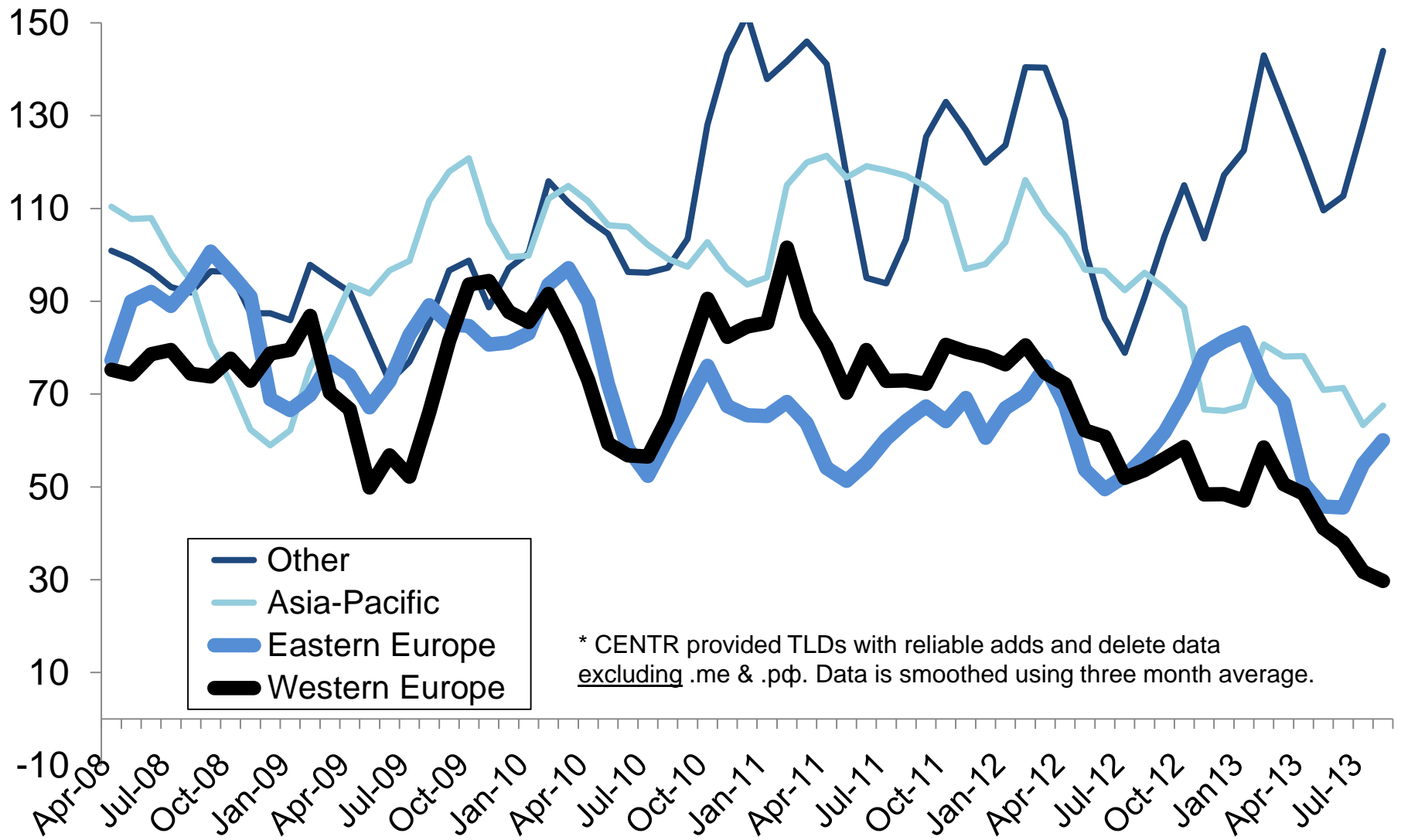
NET NEW INDEX – com, net, org, biz & mobi



Source: Recent growth trends within CENTR and gTLD registries, CENTR/ZookNic Oct 2013

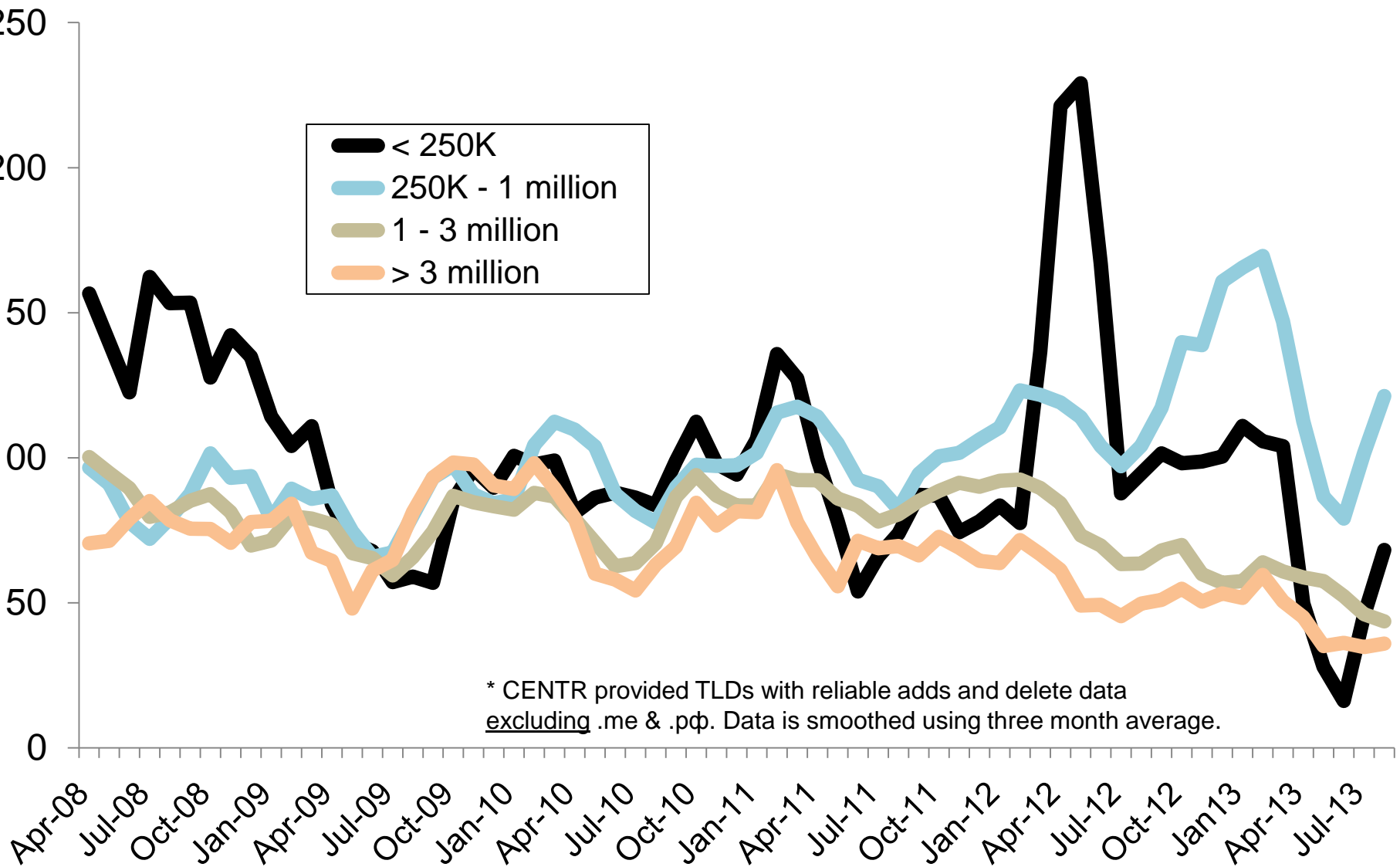


NET NEW INDEX – ccTLDs* by Regions

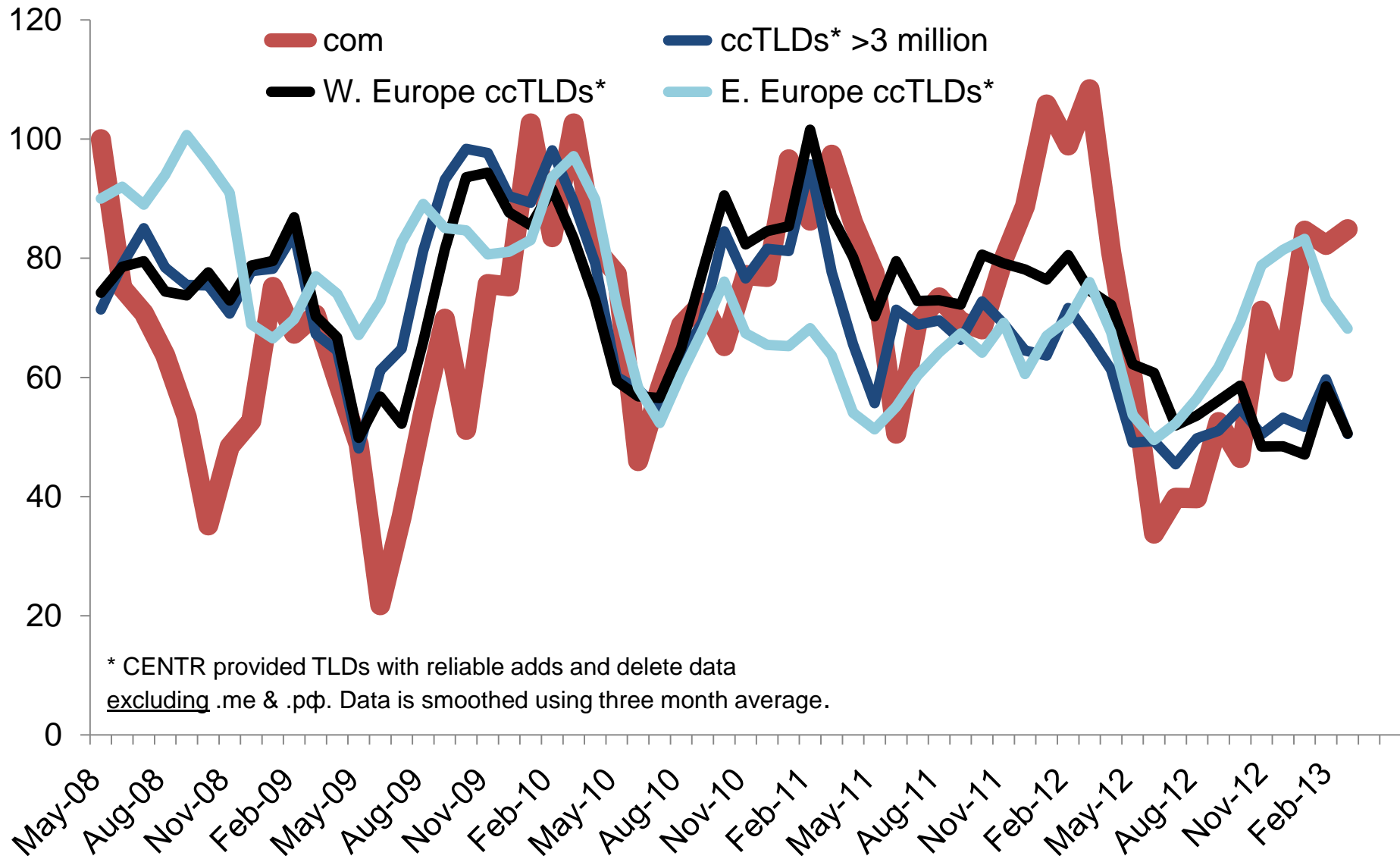


* CENTR provided TLDs with reliable adds and delete data excluding .me & .pp. Data is smoothed using three month average.

NET NEW INDEX – ccTLDs* by Registry Size



NET NEW INDEX – com and ccTLDs*



Net new registrations

- Net new domains steadily decreased since 2008
- Rough parity between gTLDs and ccTLDs
- .com remains one of the strongest TLDs for new domains
- Western Europe and/or larger TLDs exhibit slower relative and absolute growth

What about your local market ?

Similarities ? Differences ?

Prognosis?

How do you react?

Actions? Decisions ?

Thank you for your attention!