



Council of European National  
Top-Level Domain Registries

A world map composed of small dots in red and dark blue, set against a light blue background. The dots are arranged to form the continents, with red dots primarily in the Northern Hemisphere and dark blue dots in the Southern Hemisphere.

# CENTR update

## European Market and Registrar collaboration

Patrick Myles  
ccNSO - ICANN60  
Abu Dhabi, Nov 2017



# Data in CENTR

# Why bother collecting data?

## Why we collect data

- To describe the market
- Allow organisational benchmarking
- Help members make informed decisions
- Efficiency through centralised resource

## How

- Automated data feeds
- Member surveys
- Member v public



## European Market: KPIs and trends

## European ccTLDs: KPIs (Sep 16 - Sep 17)

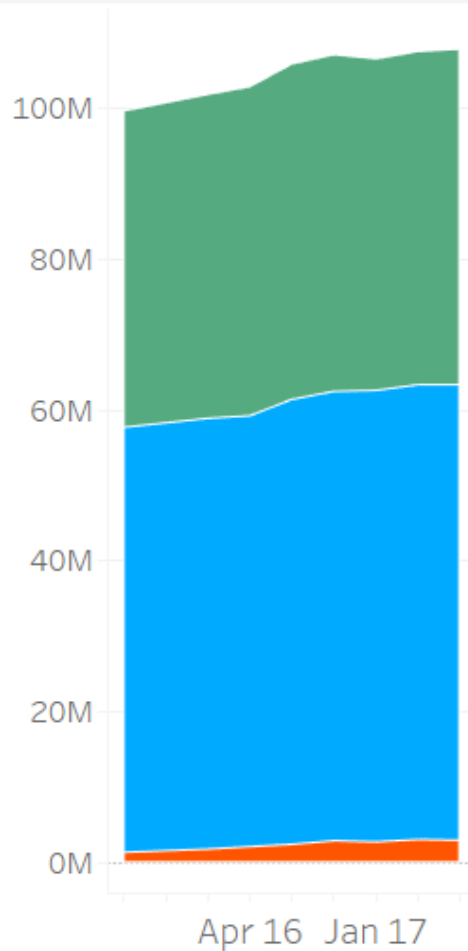
- **Registration growth:**
  - **Stabilisation** / flat trend
  - **YoY growth:** 3.0% median (5 grew over 10%, 4 contracted)
- **Renewal rate:** 80% (av.)
- **ccTLD market share\*:** 56%
- **Limited** impact from **new gTLDs**
- Av price of **6-7 EUR** (5 ccTLDs increased wholesale price)

\*based on analysis of registrant location of 107 million domains over 537 TLDs



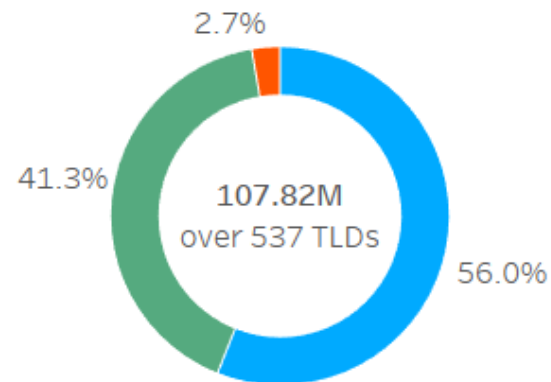
## Trends

Total Domains



## Market Share

Date: Jul 17, TLDs: 537



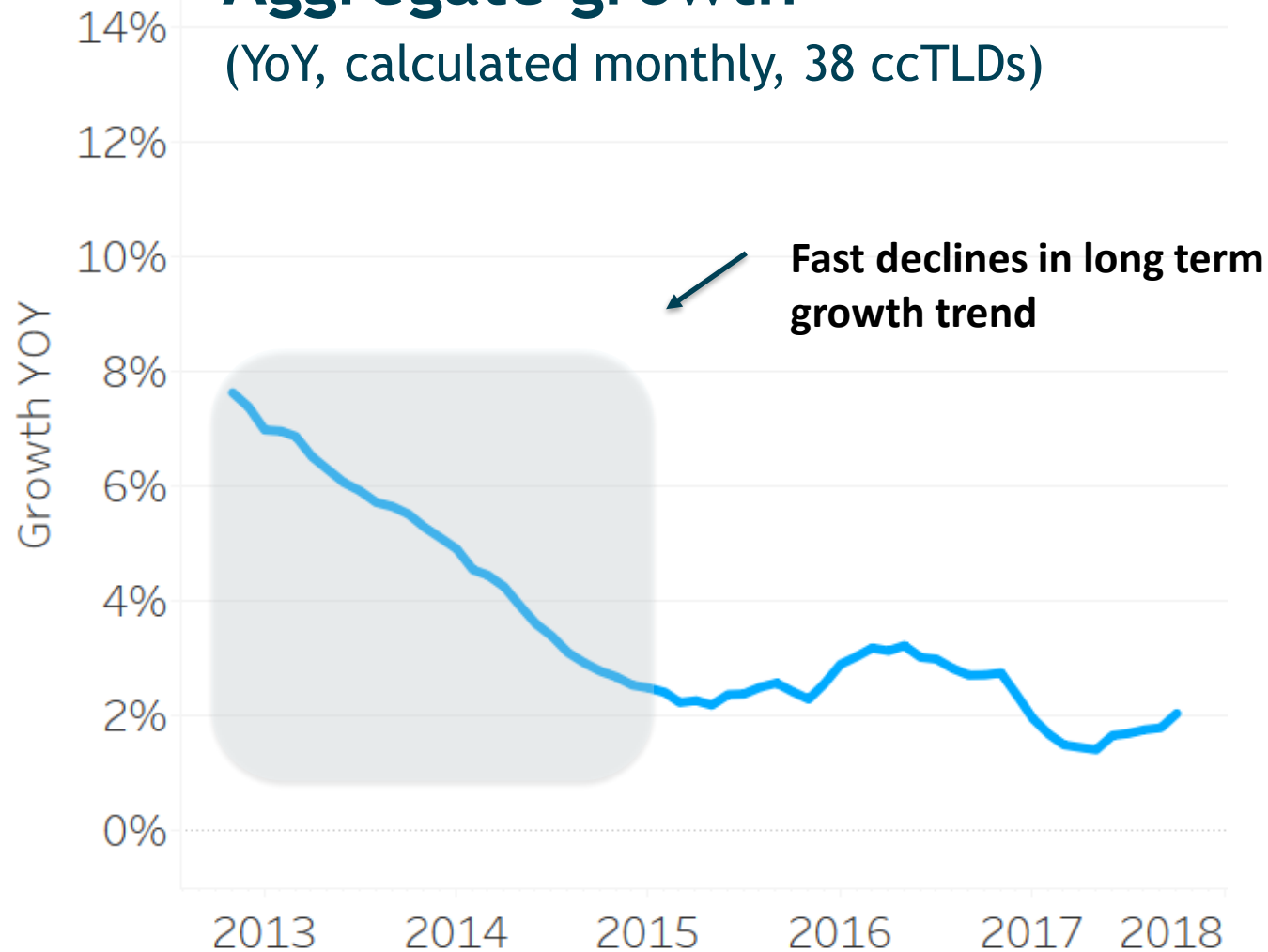
- National ccTLD
- legacy gTLD
- new gTLD



# Trends

## Aggregate growth

(YoY, calculated monthly, 38 ccTLDs)





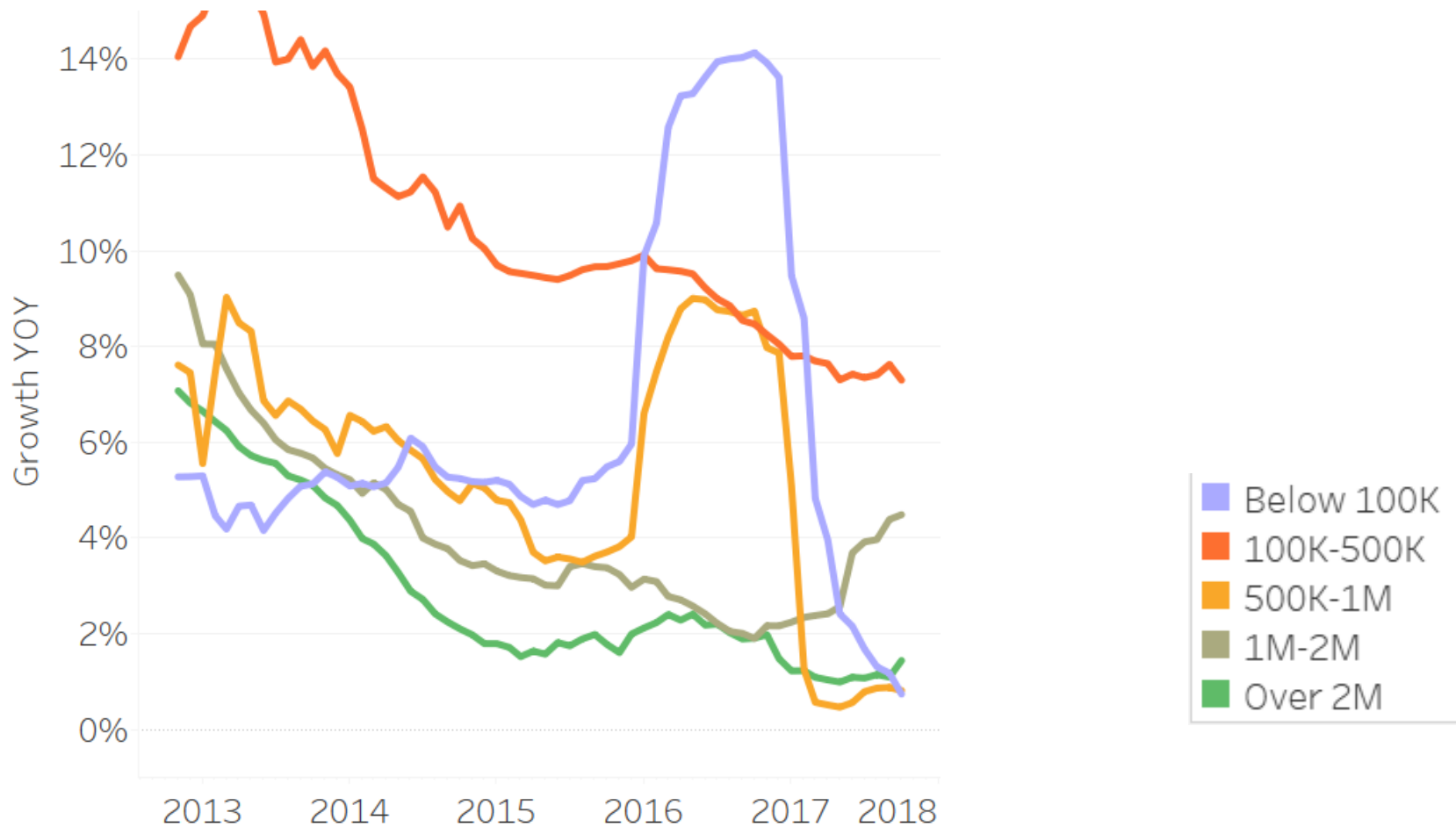
## Aggregate growth

(YoY, calculated monthly, 38 ccTLDs)



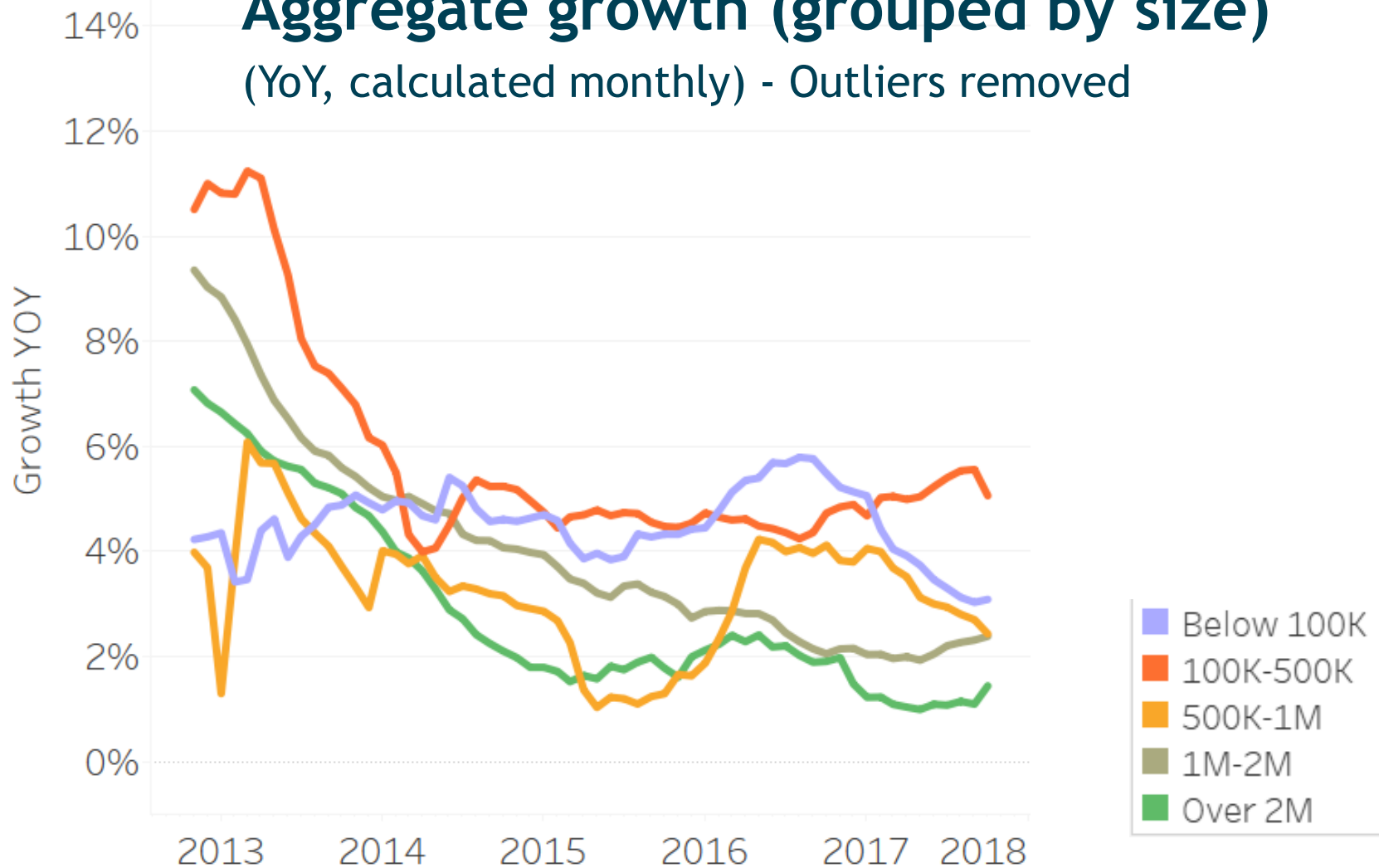
## Aggregate growth (grouped by size)

(YoY, calculated monthly)



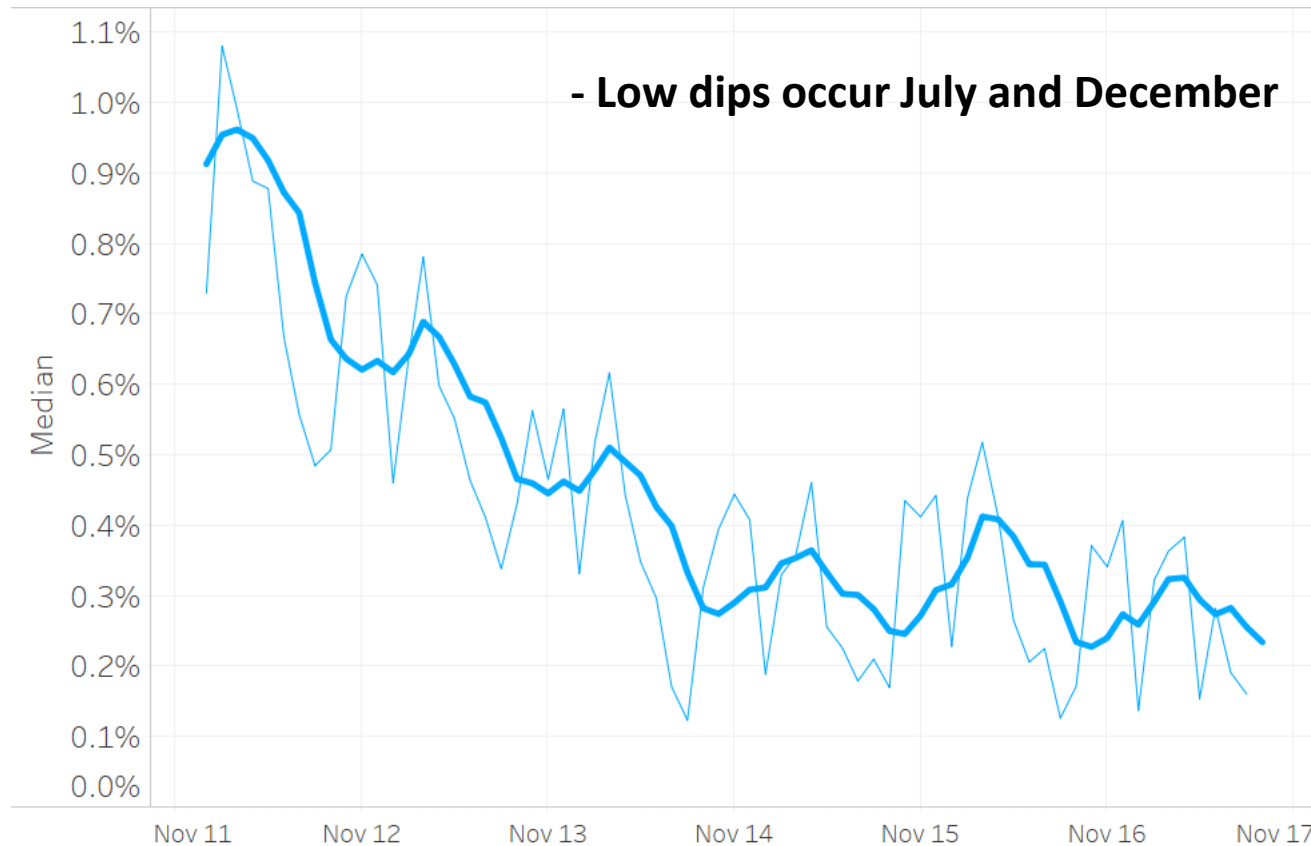
## Aggregate growth (grouped by size)

(YoY, calculated monthly) - Outliers removed



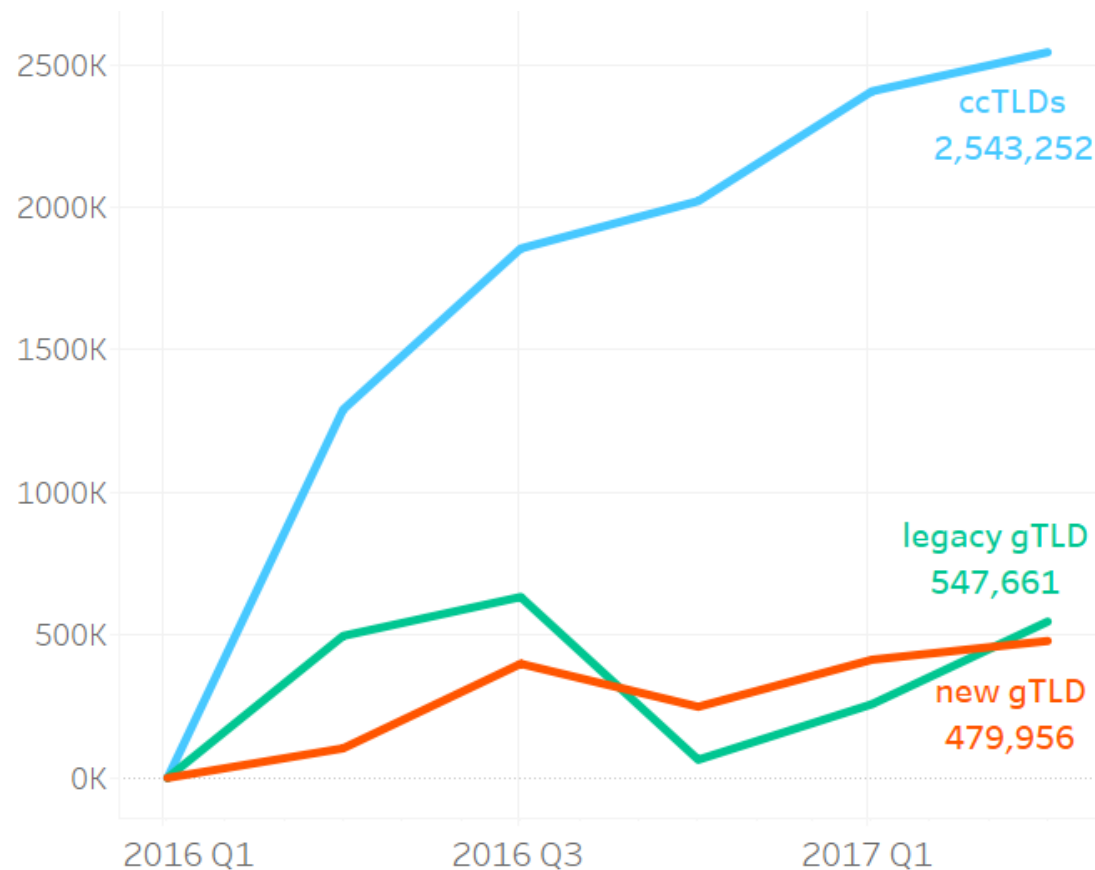
# Seasonality

(Median growth, European ccTLDs)



## Market Share Trend (Europe)

Cumulative domain growth since Jan 2016 (35 countries)





# Registrar co-operation

## Registry Registrar Data Group



### Current Participants:

Afnic, DENIC, Nominet, DNS Belgium, EURid, IIS, nic.at, SIDN, CENTR  
1&1, Safebrands, GoDaddy, Knipp, OpenSRS, OVH, Nordreg



## About the group

- Collaboration project between European registries and registrars to provide greater granularity of data on the domain market in Europe.
- 16 active registry and registrars (inc. CENTR) with regular meetings
- More details <https://stats.centri.org/rrdg#about>
- Parallel group: RDN focuses on technical elements of building a crawler, domain usage categories etc.

## Key areas

- Registrar **business models**
- Industry and usage **classifications**
- Standardisation of registration **definitions**/methodologies





# Registrar Business models

## Registrar Business Models

Domain Investor

Corporate

Brand Protection

Retail and Hosting

Access Provider

Wholesale

IT Infrastructure

More detail and descriptions <https://stats.centri.org/rrdg>



# Usage: Domain Industry Taxonomy

## ▲ Unified Category



+ Agriculture, Forestry, Fishing

- Automotive

Maintenance and Repair of Motor Vehicles

Maintenance and repair of motor vehicles including breakdown recovery, car repairs, car servicing, mechanics, auto engineers and petrol stations.

Other (Automotive)

Other automotive services not included in another category.

Rental of Motor Vehicles

Rental of motor vehicles (including cars, trucks and recreational vehicles) without a driver.

Sale of Motor Vehicles

Sale of motor vehicles (e.g. car dealerships).

Sale, Maintenance and Repair of Motorcycles and Related Parts and Accessories

Motorcycle sales, repairs & services including sale of parts and accessories.

Trade of Motor Vehicle Parts and Accessories

Wholesale & retail trade of car accessories, parts & electrics (excludes retail of fuel).

+ Beauty and Perfume

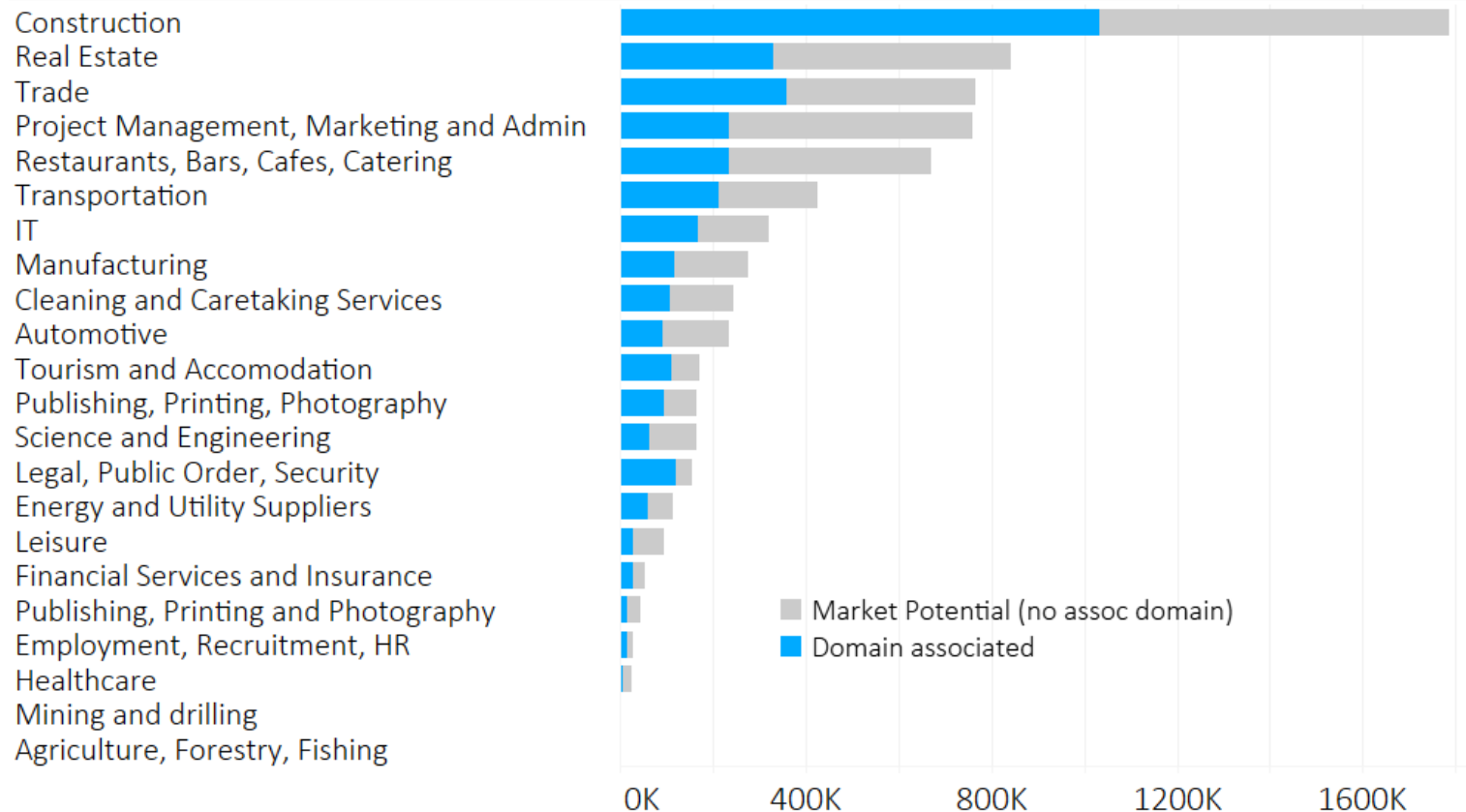
+ Cleaning and Facility Management Services

+ Community Groups, Social, Political and Religious

## Example: Using the DIT to assess market potential

Total Business ordered by market potential

Country: Country 12



<https://stats.centri.org/rrdg#sample1>



## Using Registrar models to group registration stats

### Business model

- ☐ Access Provider
- ☐ Brand Protection
- ☐ Corporate
- ☒ Domain Investor
- ☐ IT Infrastructure
- ☒ Retail and Hosting
- ☒ Wholesale

### Top chart

Total Domains

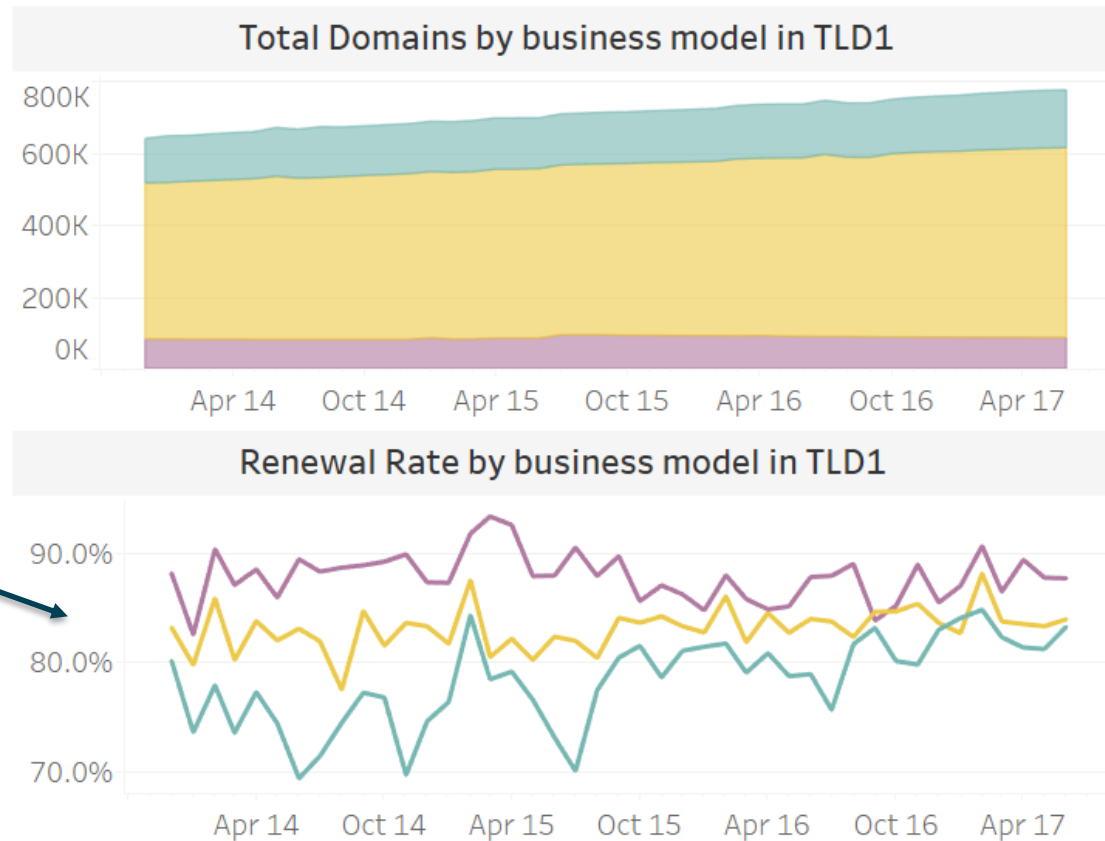
### Lower chart

Renewal Rate

### Date

Nov 13 — Jun 17

- Domain Investor
- Retail and Hosting
- Wholesale



<https://stats.centri.org/rrdg#sample2>



Measure  
Renewal Rate

Benchmark  
Business model

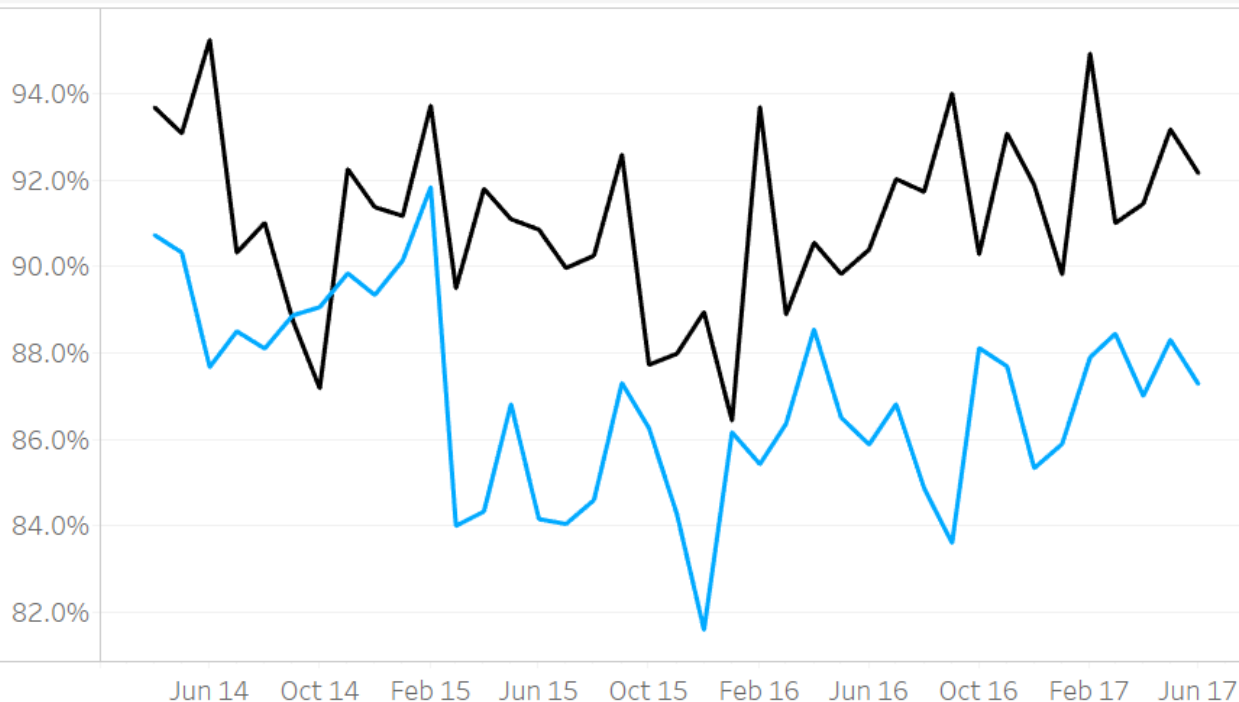
Date  
Mar 14 — Jun 17

■ Registrar 176, Access Provider  
■ Business model

Compare against your  
business model OR the  
registry as a whole

### Renewal Rate

Registrar: Registrar 176 (Business Model: Access Provider) Comparison: Business model



<https://stats.centri.org/rrdg#sample2>



## Other recent activities/topics

- **Leaders Day**
- GDPR (technical & legal)
- Content and intermediary liability
- **Legal Survey 2017**
- CENTR Awards 2017



**DENIC (.de)** *Greater Online Good*  
**EURid (.eu)** *Registry of the Year*  
**Annebeth Lange (.no)** *Contributor of the year*  
**CIRA (.ca)** *Marketing Campaign Excellence*  
**Registry.si & SIDN (.nl)** *Safe and Sound DNS*  
**Nominet (.uk)** *Above and Beyond Innovation*



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# Thank you

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