CDN market concentration

Based on top [10M, 10K, 1K] websites

https://pulse.internetsociety.org/centralization
Internet centralization

Some context

• ISOC have been interested in this topic for several years
  • cf. Internet Consolidation Report 2019
• Trying to find ways to characterise and measure
• Really focussed on long-term trends rather than specific numbers/dates
• Our current angle: **market concentration** of providers of various technology services to popular websites*

*all sites that are either in the Alexa top 10 million or in the Tranco top 1 million list
Our methodology

YMMV

- Leveraging W3Techs web technology surveys
- Domain -> DNS -> whois -> list of service providers for given market
- Marketshare calculated as ratio of sites using a provider to all sites using that technology (not all sites)
- We present Market Concentration view and Country Marketshare view on Pulse
Results
Market Concentration for CDNs

• **Gini coefficient** - a measure of (in)equality, ranges from 0 (complete equality) to 1 (complete inequality)

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<th>10M</th>
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<td>0.84</td>
<td>0.83</td>
<td>0.67</td>
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• **HHI** - a measure of market competitiveness. Traditional thresholds may not be as relevant when considering Internet technology markets

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<tr>
<td></td>
<td>6375</td>
<td>3109</td>
<td>2588</td>
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Feedback welcome

• Still actively working on this
• Have had some very useful feedback from the community already
• Would welcome more!

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