

CDN market concentration

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

<https://pulse.internetsociety.org/centralization>

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Internet centralization

Some context

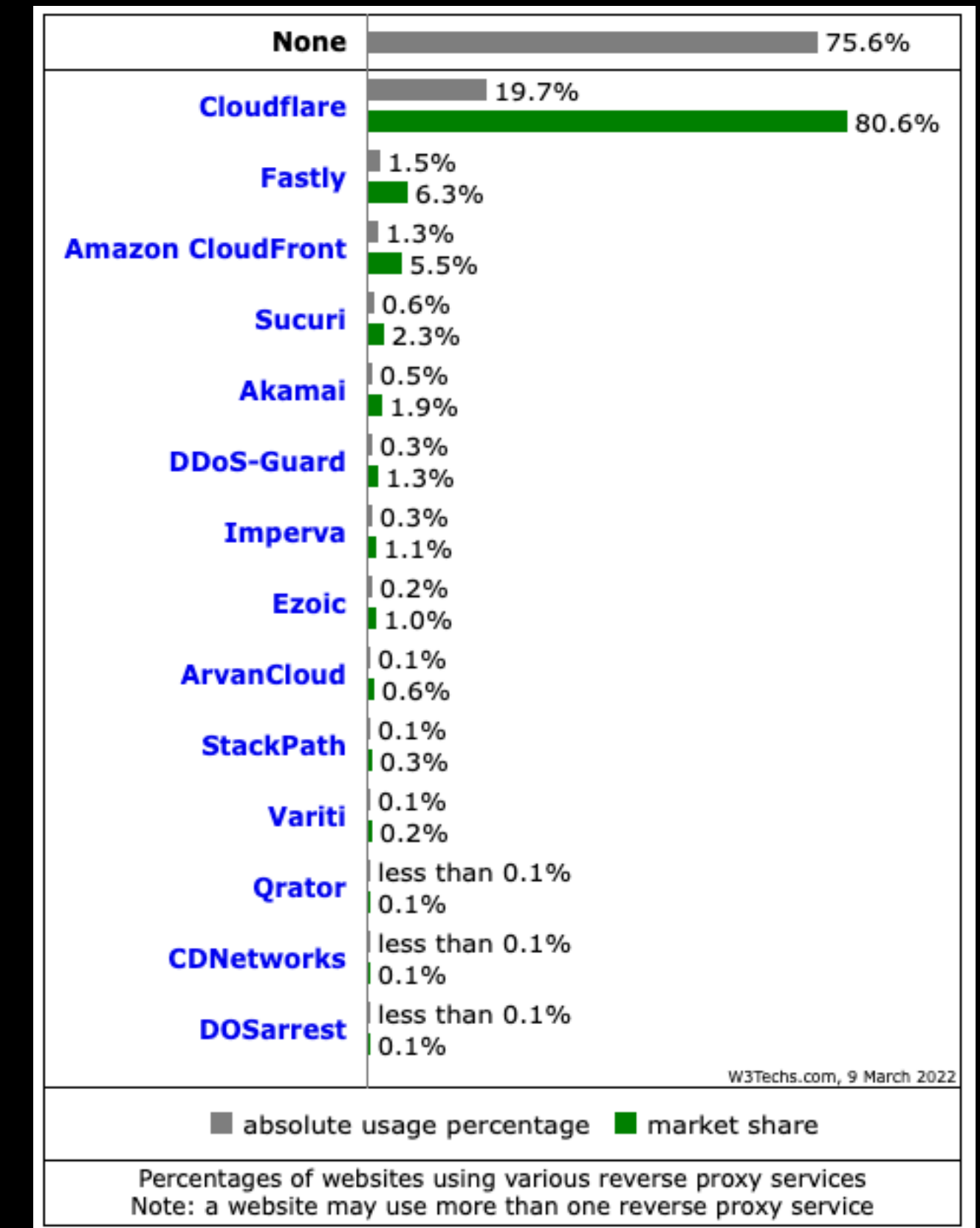
- ISOC have been interested in this topic for several years
 - cf. Internet Consolidation Report 2019
- Trying to find ways to characterise and measure
- Really focussed on long-term trends rather than specific numbers/dates
- Our current angle: **market concentration** of providers of various technology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

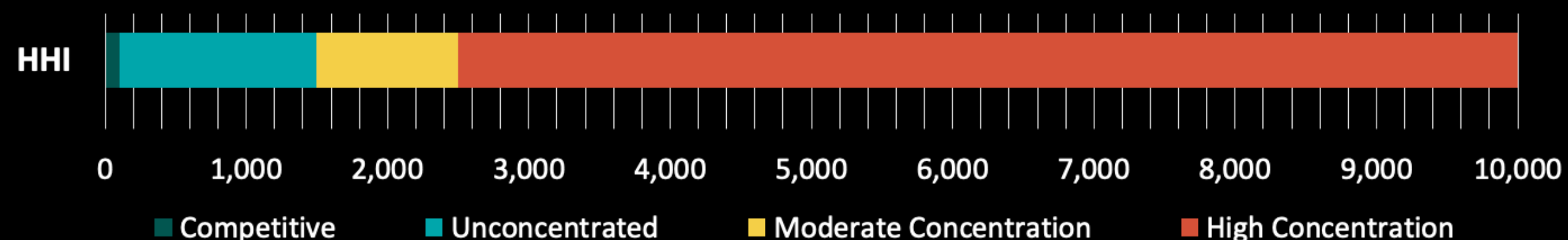
Market Concentration for CDNs

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

10M	10K	1K
0.84	0.83	0.67

- **HHI** - a measure of market competitiveness. Traditional thresholds may not be as relevant when considering Internet technology markets

10M	10K	1K
6375	3109	2588



Feedback welcome

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

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