

New ThinkCX data gives richest ever picture of local broadband markets across the UK

Ultra-reliable, 24 million-strong monthly UK broadband consumer panel ensures optimum investment, build and marketing decisions

OXFORD, OXFORDSHIRE, UNITED KINGDOM, February 8, 2023 /EINPresswire.com/ -- Researchers at ThinkCX market intelligence today reveal that the accuracy of its monthly UK local and regional broadband data is based on an extraordinarily high representation rate of 90% – a factor 6,000 times greater than comparative studies such as the Ofcom Technology Tracker designed to show stakeholders a true picture of operator market share. The latest ThinkCX data – from December 2022 – for the city of Hull demonstrates significant differences in accuracy and fluctuation.

UK market context

The share of broadband subscribers across the entire UK broadband market is well established, with the vast majority held by the top 5 ISPs: BT (32%), Sky (23%), Virgin (21%), TalkTalk (14%), and Vodafone (4%). The remaining 6% share is split between scores of smaller providers, the largest of which are Three, Shell, Hyperoptic, KCOM, and Zen. But the more significant skirmishes between broadband combatants are being played out at the regional level, often involving providers that have almost no measurable presence at national scale.

Just how dominant is KCOM in its backyard?

KCOM	95.03%
Pure Broadband	3.01%
EE	0.78%
Three	0.52%
Quicktime	0.28%
Connexin	0.22%
BT	0.06%
Sky	0.03%
TalkTalk	0.03%
Now	0.01%
Virgin	0.01%
CityFibre	0.01%
Eclipse	0.01%

Table 1 - Hull ISP market share (Dec 2022)

Year (Published March)	Technology Tracker		ThinkCX
	Raw Number*	Market Share	Market Share
2020	21	12.35%	5.82%
2021	11	5.45%	6.10%
2022	26	8.78%	6.10%

Table 2 – Comparison of KCOM's market share in Yorkshire and Humber (2020-2022)

One such market can be found at Kingston upon Hull, where KCOM (formerly Kingston Communications) has established itself as the dominant consumer ISP. How dominant are they? As of December 2022, KCOM owned a whopping 95.03% of Hull's total consumer internet subscriptions, even though it has only 0.53% of the total UK market. No other local market in the UK is as dominated by a single player as Hull is by KCOM. By contrast, BT has less than 1% share in Hull, most of which via EE.

Table 1 - Hull ISP market share (Dec 2022)

Regional market share analytics typically rely on tiny samples

While KCOM's market share supremacy in Hull is remarkable, so also are the challenges that face those who provide broadband market share analytics at a regional level. In the UK, local market share measurements are provided by Ofcom, which publishes the results of its annual Technology Tracker survey including a breakdown of the UK residential service provider market share by region. However, due to sample size limitations (between 3,500 and 4,000 respondents across all UK regions, depending on the survey year), the data provided in the Technology Tracker annual reports often shows signs of significant variability – the kind of variability that is most likely caused by statistical error and which can't be explained by naturally occurring changes in market share.

For example, if we examine KCOM's market share in the broader Yorkshire and Humber region for a three-year period from 2020-2022, we notice significant variability in the Technology Tracker (TT) survey numbers. Note that no data on Hull itself is available because overall TT sample sizes are so small. This is evident in Table 2 below, which compares the market share figures provided by TT against ThinkCX market intelligence data, where the low sample size of the TT survey is causing market share values to fluctuate wildly between reports.

Table 2 – Comparison of KCOM's market share in Yorkshire and Humber (2020-2022)

(*Raw Number refers to the number of Technology Tracker survey respondents who indicated that KCOM was the ISP that their household used as its main supplier at home)

ThinkCX publishes much more consistent and credible regional market share numbers across time because its sample size is so much larger than Technology Tracker's. ThinkCX's analytical method identifies approximately 90% of UK broadband connections, which in survey terms would be comparable to running a technology poll 12 times a year and obtaining 24 million responses each time. This extraordinary representation rate enables ThinkCX to supply market intelligence analysts with highly credible share data, not only at the national level, but even more importantly for local and regional markets.

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About ThinkCX

ThinkCX is a data science company focused on serving the communication service provider industry with actionable customer insights from the analysis of large quantities of digital consumer signals. We specialise in the accurate detection and granular measurement of service provider growth across mobility and broadband markets.

Our breakthrough approach enables us to detect market share without asking our clients to share sensitive data, directly contacting subscribers or using personal or private information, or leveraging unreliable small survey panels. Instead, we have developed a privacy compliant, technology-oriented approach that daily analyses billions of anonymous, digital signals that are licensed from thousands of mobile apps. The tactical application of our machine-learning technology assists our clients to not only acquire new subscribers, but also optimise the lifetime revenue of each existing subscriber. ThinkCX currently provides advanced data analytics for most of the top-tier telecom service providers in our domestic Canadian market and is expanding into new country markets such as the UK, Germany and Italy.

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