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United Kingdom Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The United Kingdom Data Center Market size is estimated at 2.19 thousand MW in 2024, and is expected to reach 3.61 thousand MW by 2029, growing at a CAGR of 10.49%. Further, the market is expected to generate colocation revenue of USD 9,475.2 Million in 2024 and is projected to reach USD 18,218.5 Million by 2029, growing at a CAGR of 13.97% during the forecast period (2024-2029).

Tier 3 data center accounted for majority share in terms of volume in 2023, it will continue its dominance during forecast period

Tier 3 data centers are the most preferred due to features such as onsite assistance, power, and cooling redundancy. The Tier 3 DC market was operating at 1540.98 MW in 2022. The expected capacity during the forecast period is expected to grow from 1813.19 MW in 2023 to 3369.24 MW in 2029 at a CAGR of 10.88%. These data centers are 'concurrently maintainable' with redundant components as a key differentiator.

SMBs generally prefer to use at least a tier III-rated system for the far superior redundancy protections offered. In the United Kingdom, SMEs account for 99.9% of the business population. At the start of 2022, there were estimated to be 5.5 million businesses in the UK private sector. Major adoption of tier 3 facilities is reflected in BFSI, telecom, and media and entertainment users are majorly adopting wholesale and hyperscale colocation. As of 2022, there are around 148 Tier 3 data centers in the country, and around 28 upcoming data centers are under construction with Tier 3 standards.

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Tier 4 is the next most preferred data centers by large enterprises due to their fault-tolerant functionality, lower downtime, and 99.99% uptime. It is expected that the market will showcase potential growth during the forecast period with the adoption of hyperscale colocation by major end users in the cloud and telecom sectors. The UK government's G-Cloud program is changing the way public sector organizations purchase information and communications technology. In 2022, the country had two Tier 4 data centers owned by Exascale Ltd and ServerMania.

The Tier 1&2 data centers are the least preferred due to their single path for power and cooling and providing expected uptime of 99.671% (28.8 hours of downtime annually) when compared to Tier 3 and Tier 4 facilities.

United Kingdom Data Center Market Trends

Increase smartphone penetration rate, emergence of 4G and 5G services to boost market growth

The number of smartphone users in the country was 63.46 million in 2022 and is expected to witness a CAGR of 1.01% during the forecast period to reach a value of 68 million by 2029.

The smartphone penetration rate in the United Kingdom has increased each year, reaching an overall figure of 93% in 2022. Among the age group of 16-24, the smartphone ownership rate was 99% in 2022. The number of mobile internet users in the United Kingdom reached 62.3 million, a figure which is projected to increase by approximately 2.86 million and amount to over 65 million by 2026 with the emergence of 4G and 5G. Further, since the COVID-19 pandemic hit, people have increased their smartphone usage and spent more time on online gaming or media streaming platforms. As a result, in April 2020, the industry increased the spending limit on individual contactless card payments from GBP 30 to GBP 45 to help with online payments. Such a scenario has increased smartphone penetration and is currently following the same trend.

The growth of the user base positively boosted the market demand for data centers. The increasing rate has positively upheld its growth in the e-commerce, media and entertainment, and BFSI sectors, where a large chunk of data has been generated.

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Since smartphones necessitate real-time processing on having a large data chunk, they mostly require a data center for storage. During the historical period, when smartphone usage penetration increased from 72% in 2017 to more than 90% in 2022, the number of racks in the data center increased from around 215k in 2017 to 388k in 2022. This trend is further expected to be witnessed during the forecast period.

Phase out of 2G and 3G and adoption of 4G and 5G network and increase in use of mobile devices to drive market growth

The United Kingdom's first 5G network was activated in May 2019, and 4G was launched in October 2012. Since being commissioned, both networks have shown an increment in their data speed. 4G speed increased from 12 Mbps in 2012 to 36.40 Mbps in 2022. Similarly, 5G speed increased from 139.5 Mbps in 2019 to 160.15 Mbps in 2022. In May 2022, according to an industry survey, around 67% of respondents in the United Kingdom (UK) had a 4G service on their smartphone, while about 25% had a 5G service.

The UK will phase out 2G and 3G mobile services by 2033. The major strategy for all the operators is to turn off their 2G and 3G networks, allowing them to focus investments and spectrum resources on further improving the 4G customer experience while rolling out 5G. The UK government has outlined its intentions to invest in driving 5G and 6G development with the support of GBP 110 million (USD 135 million) worth of investment. Moreover, the switch-off date for 2G and 3G has been agreed upon with mobile-network operators Vodafone, EE, Virgin Media, O2, and Three.

The growth in speed and better overall connectivity is paving the way for other end-user industries. In 2021, users in the United Kingdom spent an average of four hours per day using their mobile devices. This was an increase of 0.3 hours up from 2020. The number of social media users in the United Kingdom at the start of 2022 was equivalent to 84.3% of the total population, and it increased by 4.6 million between 2021 and 2022. Overall, this will increase the mobile data speed, increasing the data traffic, which thereby requires data centers for storing and processing data.

United Kingdom Data Center Industry Overview

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The United Kingdom Data Center Market is fragmented, with the top five companies occupying 37.94%. The major players in this market are Digital Realty Trust Inc., Equinix Inc., NTT Ltd, Rackspace Technology Inc. and Virtus Data Centres Properties Ltd (STT GDC) (sorted alphabetically).

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