

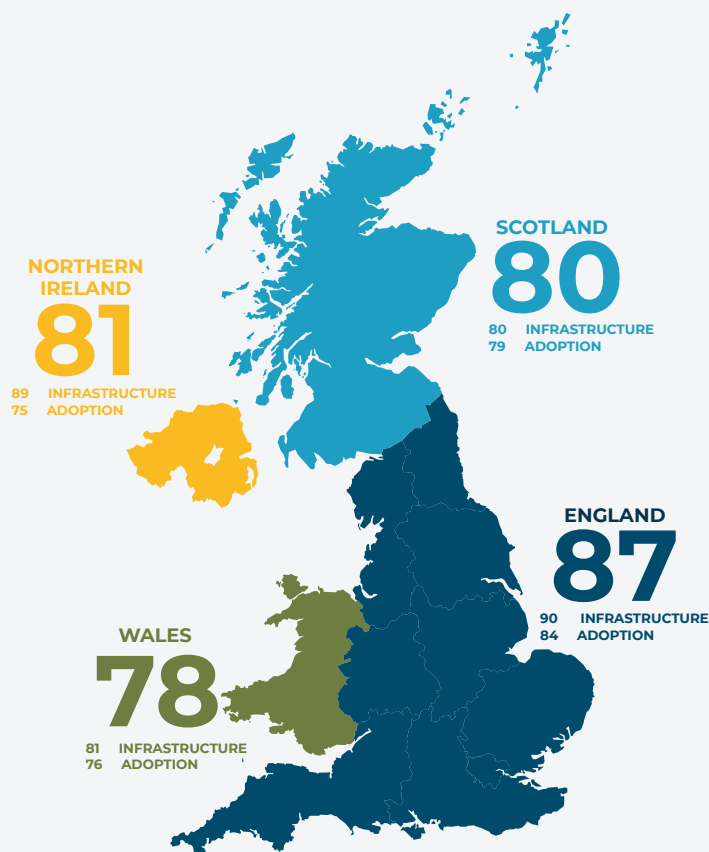
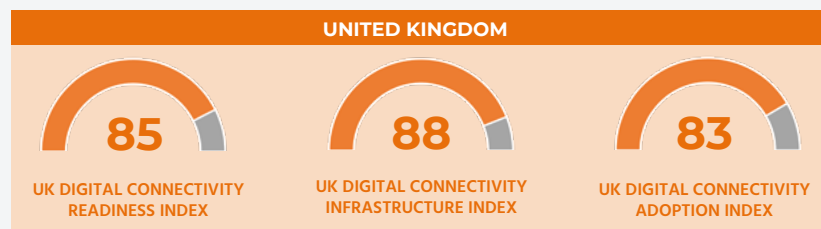


# Digital Connectivity Readiness Index

March 2024 Update



# Executive Summary



Digital connectivity plays an increasingly crucial role in facilitating economic growth, advancing progress towards achieving Net Zero goals, and enhancing social wellbeing. However, to fully realise these important benefits, it is essential to have both high-quality digital infrastructure and widespread digital adoption.

In October 2023, we launched the Digital Connectivity Readiness Index (DCRI) to help decision makers across the UK begin to understand how they perform across both digital infrastructure and adoption. This report provides **an update of the DCRI results for March 2024**, giving an overview of the key findings for the UK and each of the constituent nations.

The results for March show that the UK and all of its constituent nations have built upon their strong position over the four-month period to harness the full potential of digital, with overall headline DCRI scores increasing across all four nations.

The picture continues to be strongest on the **Infrastructure** side with the UK as well as each of England, Scotland, Wales and Northern Ireland seeing increases in their scores. This largely been driven by strong investment in Gigabit and 5G rollout, with Wales and Northern Ireland also seeing progress in decent fixed connectivity.

On the **Adoption** side, things are much more mixed, with indices for the UK as a whole and for Wales remaining static over the period, and the other nations only seeing very marginal improvements. Whilst progress has been seen on indicators such as increasing levels of people online and wellbeing. There remain significant challenges for many around affordability, skills and security.

So, there is definitely still significant room for progress. For decision-makers undertaking an initial Digital Connectivity Readiness assessment is just the first stage that public bodies need to take to understand the strengths and challenges within their region to enable them to create an evidence-based digital strategy. It brings together all the pieces of the connectivity jigsaw puzzle and delivers a robust mechanism to inform and track progress towards achieving local digital priorities.

# Introduction

Whilst it is widely recognised that digital connectivity is increasingly important in enabling economic, social and environmental change, activity within the sector has largely focussed on the roll out of infrastructure networks. This has driven both large scale commercial and public investment in improving the available infrastructure across the UK. However, the rollout of networks is only one aspect of harnessing digital. Infrastructure alone, devoid of widespread adoption, fails to yield any tangible benefits for households, communities, or businesses.

## Background to the Digital Connectivity Readiness Index

Our recent [FarrPoint Digital Connectivity Survey 2024](#) indicated that whilst there is a growing recognition that we, as a sector, need to fully appreciate the links between digital infrastructure and adoption, there is a limited understanding of the differences in regional performance between these two factors. This means that local and regional governments are not able to make evidence-based decisions on prioritising spend, and instead follow national decisions.

With that in mind, we created the Digital Connectivity Readiness Index (DCRI), as a starting point for this discussion. It can be used to aid public bodies at all levels to consider how they perform against each piece of the [Connectivity Jigsaw](#), and thus to fully maximise the benefits of digital.

This tool is based on an assessment of a range of indicators across both infrastructure and adoption. It enables policymakers to benchmark key challenges and opportunities, and thus to make informed evidence-based decisions when developing digital strategies and projects.

## Digital Connectivity Readiness Index Methodology

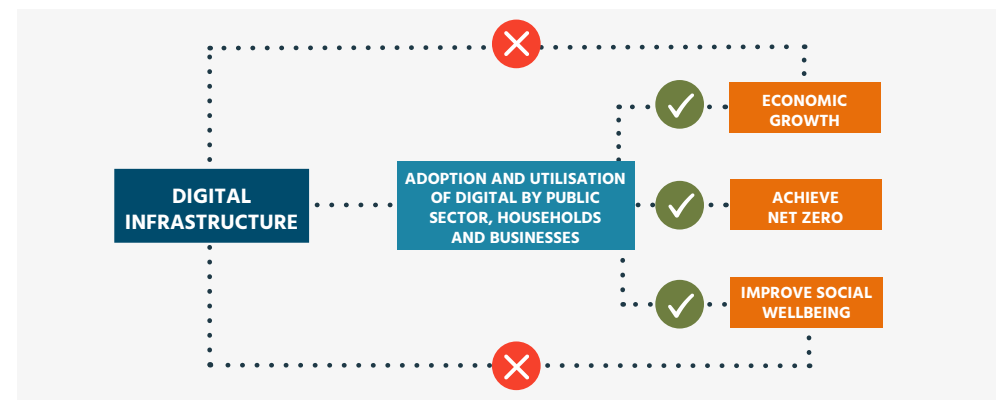
The scores contained within the DCRI are based on a range of indicators gathered from data sources, including Ofcom and the Office for National Statistics. On the infrastructure side, this includes metrics on Gigabit, Superfast, 4G and 5G connectivity. Then on the adoption indicators focus on understanding performance on Online Households, Digital Skills, Security Online, Online Wellbeing, Access to Public Services, Affordability, the Digital Economy and Innovation.

A robust approach to weighting has been used to ensure that the indicators take into account the commercial, regulatory and policy prioritisation considerations. This includes a larger weighting being applied to the adoption of digital technologies given the importance that this has in delivering real outcomes for households and businesses alike. On the methodology, it is also important to note that some of the indicators for October 2023 were revised due to underlying data revisions.

This delivers a result that is not only accurate but also helps deliver real value when it comes to designing digital connectivity infrastructure, adoption and inclusion projects.

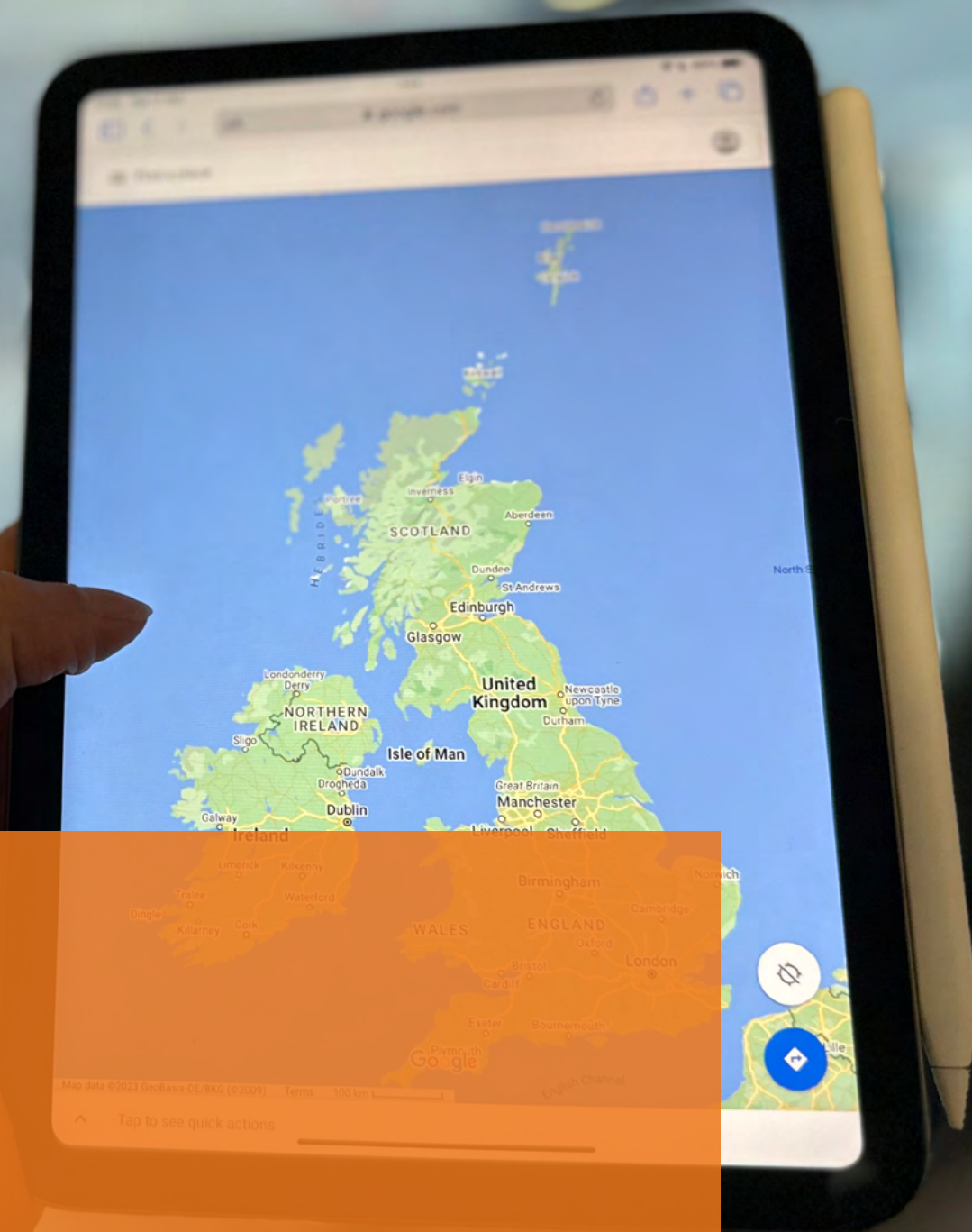
This is the second iteration of the DCRI, and this report looks at some of the changes that have occurred within the most recent results. FarrPoint is also working with various UK public bodies (including Local and Combined Authorities) to define their local readiness scores, which can then be used to track progress over time and compare progress against regional and national averages.

However, the roll out of Gigabit connectivity is only one part of the digital connectivity puzzle. As shown in the diagram below, connectivity infrastructure alone, without adoption, does not produce any benefits.

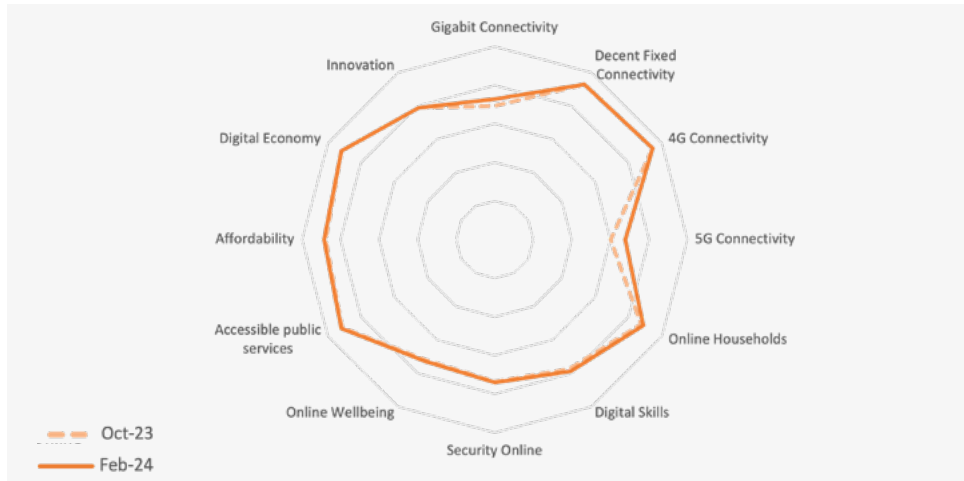


Only when that digital infrastructure is rolled out and utilised by households, businesses and public sector we will see economic growth, aid the journey towards Net Zero and improve social wellbeing.

# UK Results



# UK Results



	MARCH 2024	OCTOBER 2023
<b>Digital Connectivity Readiness Index</b>	<b>85</b> ▲	<b>84</b>
<b>Digital Connectivity Infrastructure Index</b>	<b>88</b> ▲	<b>87</b>
Gigabit Connectivity	73 ▲	69
Decent Fixed Connectivity	93 -	93
4G Connectivity	95 -	95
5G Connectivity	68 ▲	60
<b>Digital Connectivity Adoption Index</b>	<b>83</b> ▲	<b>83</b>
Online Households	89 ▲	88
Digital Skills	79 ▲	77
Security Online	74 -	74
Online Wellbeing	73 ▲	72
Accessible Public Services	92 ▲	91
Affordability	89 -	88
Digital Economy	92 ▲	92
Innovation	79 -	79

The overall UK Digital Connectivity Readiness Index has shown an improvement since October 2023, with the overall score increasing by 1-point to 85 in March 2024. This increase is driven by advancements in the Infrastructure Indices up to 88 from 87 previously, whereas the Adoption Index was overall unchanged at 83.

The advancement in the headline **Infrastructure** Index was driven by continued strong commercial and public investment and roll out of Gigabit networks, alongside improvements in 5G coverage. However, the indicators for decent fixed (taking into account superfast plus coverage) connectivity and 4G connectivity remained unchanged between October 2023 and March 2024.

On the **Adoption** side, the index was unchanged between October 2023 and March 2024, despite some marginal improvements across several of the key indicators:

- Online Households – driven by a rise in the proportion of people being confident internet users and those making the most of improvements in the availability of stable and reliable digital connectivity through the use of smartphones.
- Digital Skills – despite more businesses citing more digital skills vacancies and the proliferations of skills gaps amongst the labour force, improvements in foundational digital skills and in people learning skills online has led to an uptick in this indicator at the UK level.
- Online Wellbeing – enhanced online wellbeing was driven by improvements in people’s beliefs in time spent online and the benefits it incurs. However, worryingly there was a slight decrease in child wellbeing online over the period.
- Access to Public Services and Affordability – slight changes in public spending as well as increases in earnings, and a reduction in the people cancelling digital services, has led to improvements in these indicators.

The remaining indicators on the adoption side were unchanged since October 2023.





# England Results



# England Results



	MARCH 2024	OCTOBER 2023
<b>Digital Connectivity Readiness Index</b>	<b>87</b> ▲	<b>86</b>
<b>Digital Connectivity Infrastructure Index</b>	<b>90</b> ▲	<b>89</b>
Gigabit Connectivity	73 ▲	80
Decent Fixed Connectivity	95 -	95
4G Connectivity	98 -	98
5G Connectivity	70 ▲	63
<b>Digital Connectivity Adoption Index</b>	<b>84</b> ▲	<b>83</b>
Online Households	89 ▲	88
Digital Skills	78 ▲	75
Security Online	74 -	74
Online Wellbeing	73 ▲	72
Accessible Public Services	92 ▲	91
Affordability	90 ▲	88
Digital Economy	97 -	97
Innovation	81 -	81

England saw a 1-point uplift in its Digital Connectivity Readiness Index score in March 2024 compared to the previous October. This improvement was driven by a 1-point rise in both the Infrastructure Index (up to 90, from 89 previously) and the Adoption Index (up to 84, from 83 previously).

As at an overall UK level, the increase in the **Infrastructure** Index for England was driven by continued strong investment and network roll out of Gigabit services, coupled with the hastening enhancements in 5G mobile coverage. The indicators for decent fixed and 4G connectivity remained unchanged over the period.

The **Adoption** Index saw a 1-point boost, spurred by upticks in six out of eight key indicators, including:

- Online Households – enhanced home internet access, along with heightened smartphone usage, contributed to a raised Online Household score for England.
- Digital Skills – advancements in fundamental digital skills, coupled with increased internet usage for skill enhancement and reduced digital skills disparities at the national level in England, more than offset a slight increase in businesses reporting skill-shortage vacancies.
- Online Wellbeing – enhanced perceptions regarding the advantages of utilising online services and increased time spent online counteracted a concerning decline in the online wellbeing of younger individuals.
- Access to Public Services and Affordability – in line with the UK average, slight changes in public spending, as well as increases in earnings and a reduction in people cancelling digital services, has led to improvements in these indicators.

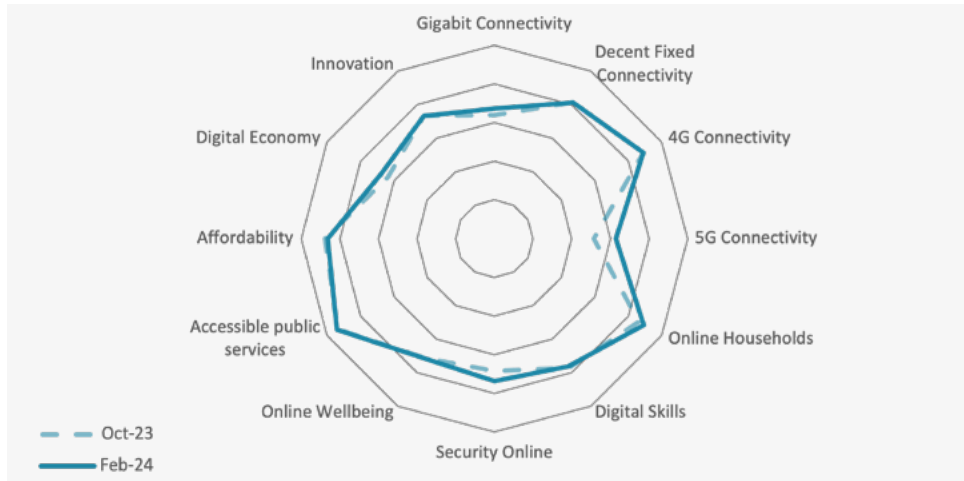
Indicators relating to Security Online, Digital Economy and Innovation remained unchanged over the period.



# Scotland Results



# Scotland Results



	MARCH 2024	OCTOBER 2023
<b>Digital Connectivity Readiness Index</b>	<b>80</b> ▲	<b>78</b>
<b>Digital Connectivity Infrastructure Index</b>	<b>80</b> ▲	<b>79</b>
Gigabit Connectivity	67 ▲	64
Decent Fixed Connectivity	81 -	81
4G Connectivity	89 -	89
5G Connectivity	63 ▲	52
<b>Digital Connectivity Adoption Index</b>	<b>79</b> ▲	<b>78</b>
Online Households	89 ▲	86
Digital Skills	76 ▼	77
Security Online	74 ▲	68
Online Wellbeing	72 ▲	71
Accessible Public Services	94 -	94
Affordability	86 ▼	88
Digital Economy	67 ▲	64
Innovation	73 -	73

Overall, Scotland performed well over the most recent period, with its overall Digital Connectivity Readiness Index rising by 2-points since October to 80 in March 2024. The increase in the headline score for Scotland was due to 1-point rises in both the Infrastructure Index (up to 80, from 79 previously), and the Adoption Index (up to 79, from 78 previously).

Improvements in the **Infrastructure** Index for Scotland, in line with the rest of the UK, were chiefly driven by continued investment and network rollout of 5G mobile coverage alongside Gigabit services. Between October 2023 and March 2024, there was no change in the indicators for 'decent fixed' and 4G connectivity.

On the **Adoption** Index side, whilst the overall score increased more than the Infrastructure Score, the performance on indicators was mixed. On the Improvements side:

- Online Households – a 3-point increase was driven by more individuals using smart-phones for internet access and displaying greater confidence in being online.
- Security Online – there were significant improvements in Scotland against all of the metrics concerning online security, with the results coming more in line with those of the rest of the UK.
- Online Wellbeing – the marginal improvement in online wellbeing in Scotland was caused by a slight uplift in younger individuals' wellbeing online, bucking the negative trend seen elsewhere in the UK.
- Digital Economy – this rise was encouragingly propelled by an increase in the proportion of digital workers within the economy during the most recent period.

However, on the downside:

- Digital Skills – the worsening in the digital skills indicator was due to it being raised by businesses as a key skills shortage.
- Affordability – this indicator experienced a setback due to an increase in households reporting subscription cancellations to digital media and communications, alongside a rise in the number of individuals earning below the Living Wage.

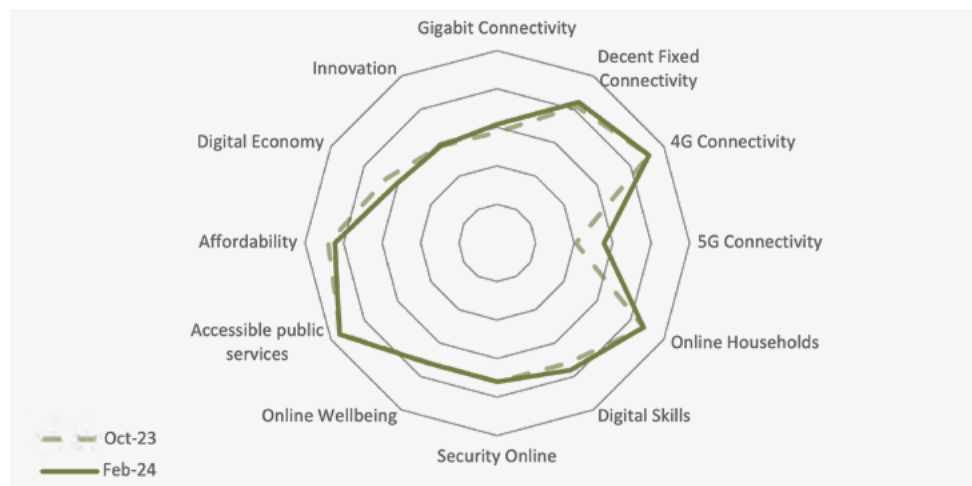
Indicators related to Accessible Public Service and Innovation remained unchanged.



# Wales Results



# Wales Results



	MARCH 2024	OCTOBER 2023
<b>Digital Connectivity Readiness Index</b>	<b>78</b> ▲	<b>77</b>
<b>Digital Connectivity Infrastructure Index</b>	<b>81</b> ▲	<b>78</b>
Gigabit Connectivity	62 ▲	58
Decent Fixed Connectivity	85 ▲	82
4G Connectivity	91 -	91
5G Connectivity	56 ▲	41
<b>Digital Connectivity Adoption Index</b>	<b>76</b> -	<b>76</b>
Online Households	88 -	88
Digital Skills	76 ▲	72
Security Online	72 -	72
Online Wellbeing	72 -	72
Accessible Public Services	95 ▲	94
Affordability	84 ▼	88
Digital Economy	61 ▼	67
Innovation	58 -	58

Wales' Digital Connectivity Readiness Index has shown a marginal improvement since October 2023, with the overall score increasing by 1-point to 78 in March 2024, from 77 previously. This increase was driven by a notable rise in the Infrastructure indices up 3-points to 81 from 78 previously, whereas results on Adoption were mixed and meant the overall Index was unchanged at 76.

The Welsh **Infrastructure** index saw one of the largest increases over the period, up by 3 points, overtaking the Scotland score. This increase was driven most notably by improvements in 5G coverage as well as continued strong rollout of Gigabit networks. Wales also saw an increase in the coverage of decent fixed connectivity, driven by a reduction in the proportion of premises unable to receive 10Mbps speeds. As with all the other UK nations, there was no change in the 4G indicator.

On the Digital **Adoption** side, two indicators increased and two decreased over the four months to March 2024, with the remaining four staying unchanged over that period. On the positive side:

- Digital Skills – significant rises in metrics surrounding individuals with foundational digital skills and online education showing progress, perhaps a testament to the Digital Communities Wales programme.
- Accessible Public Services – slight increases in public spending over the period led to a marginal rise in the delivery of online public services.

However, these positives were offset overall by:

- Affordability – as seen in other nations in the UK, the affordability indicator experienced a fall in Wales, due to more households reporting subscription cancellations to digital media and communications, alongside a rise in the number of individuals earning below the Living Wage.
- Digital Economy – a significant fall in the number of people working in Digital over the period, meant that this indicator fell by 6 points.

Indicators related to Online Households, Security and Wellbeing Online, Innovation remained stable over the period.





# Northern Ireland Results



# Northern Ireland Results



	MARCH 2024	OCTOBER 2023
<b>Digital Connectivity Readiness Index</b>	<b>81</b> ▲	<b>79</b>
<b>Digital Connectivity Infrastructure Index</b>	<b>89</b> ▲	<b>86</b>
Gigabit Connectivity	92 ▲	91
Decent Fixed Connectivity	91 ▲	85
4G Connectivity	96 -	96
5G Connectivity	55 ▲	42
<b>Digital Connectivity Adoption Index</b>	<b>75</b> ▲	<b>74</b>
Online Households	89 ▲	88
Digital Skills	78 ▲	73
Security Online	72 ▼	74
Online Wellbeing	71 ▲	68
Accessible Public Services	87 ▼	88
Affordability	84 ▲	81
Digital Economy	60 ▲	59
Innovation	59 -	59

Overall, the Digital Connectivity Readiness Index for Northern Ireland saw a rise of 2 points. This was driven by a large surge in the Infrastructure Index (up to 89, from 86 previously), with an increase also seen in the Adoption Index score (up to 75 from 74 previously).

Northern Ireland continued to perform strongly on the **Infrastructure** Index, with notable rises across both Gigabit and Decent Fixed connectivity indices as well as 5G connectivity. This has been driven by continued public sector spending on Project Stratum, as well as commercial rollout. As with the other nations the 4G indicator remained unchanged in March 2024.

Whilst the **Adoption** Index score remained significantly behind its Infrastructure counterpart (some 14-points lower), it had increased over the five months to March 2024. However, looking below the headline indicator, as with the other nations, the picture is mixed. On one side the improvements included:

- Online Households – the number of active Internet users and individuals using smartphone technology to access the internet increased over the period.
- Digital Skills – there were improvements in metrics on individuals with general foundational digital skills and increase in online education, along with the number of job applicants without basic digital skills nearly halving.
- Online Wellbeing – in Northern Ireland, there were improvements in all the wellbeing metrics including for both the general population, in particular in those aged under 18.
- Affordability – a fall in the number of people cancelling their digital services and a rise in average wages and house prices more than offset a marginal rise in the number of lower earners over the period.
- Digital Economy – a slight increase in the number of digital workers increased this indicator over the five months to March.

On the negative side, there were falls in two indicators:

- Security Online – concerns around online advertising and ‘fake news’ has led to a slight fall in the security online indicator.
- Accessible Public Services – uncertainty in the Northern Ireland political situation has led to a marginal fall in public sector spending.



# Next Steps

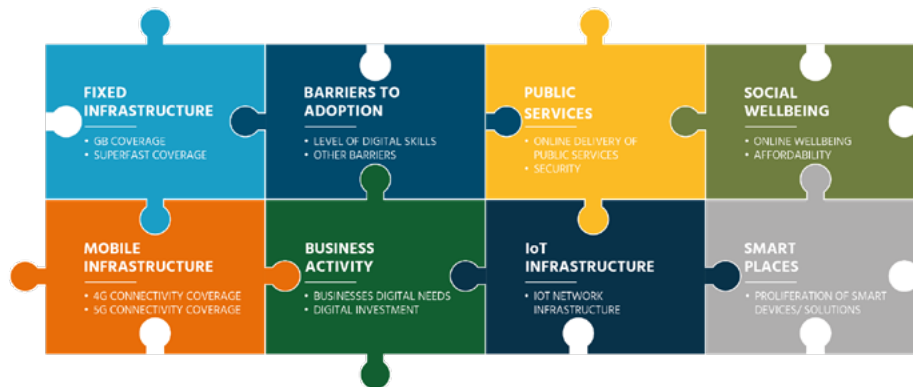


## Next Steps

Digital connectivity is increasingly important in enabling economic, social and environmental change, and therefore the UK has put a lot of focus on the roll out of infrastructure through programmes such as Project Gigabit and Shared Rural Network.

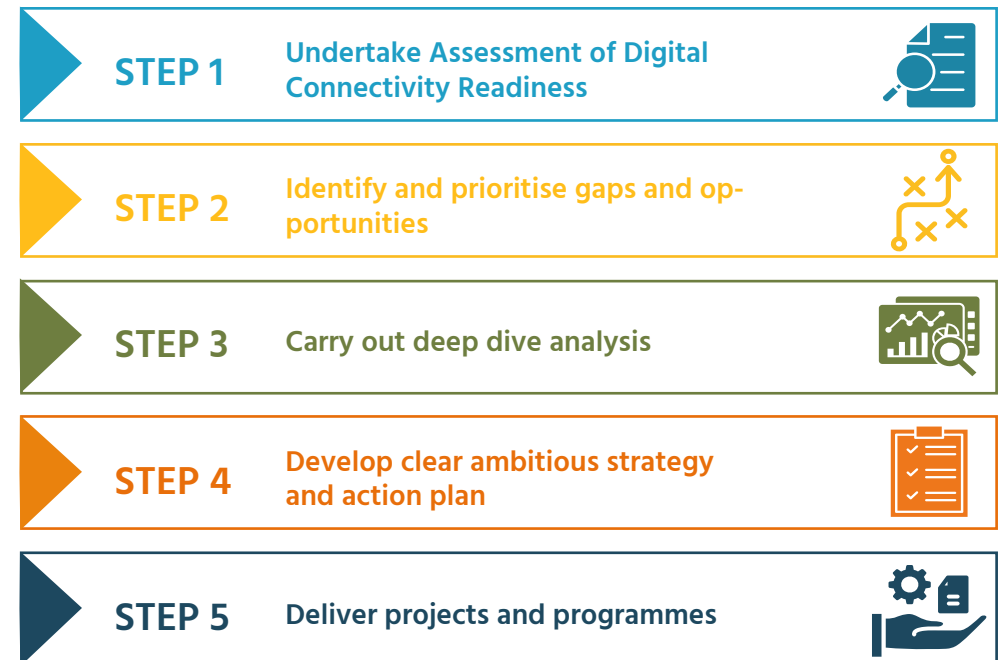
However, infrastructure on its own does not deliver the benefits to wider households and businesses.

This is highlighted in FarrPoint's Digital Connectivity Jigsaw Puzzle, where all the pieces are required to maximise economic growth, aid the journey towards Net Zero, and improve social wellbeing.



*FarrPoint's Digital Connectivity Jigsaw Puzzle*

Undertaking the Digital Connectivity Readiness Assessment and defining the DCRI score is the first stage in a 5-step plan that public bodies can take to understand the strengths and challenges within their region and to enable them to create a digital strategy and implementation plan.



*5-step approach to solving the Digital Connectivity Jigsaw*

**GET IN TOUCH ABOUT YOUR DCRI SCORE**

# About FarrPoint

FarrPoint is a connectivity and smart technology consultancy with operations in the UK, US and Canada.

At FarrPoint, we understand the importance of connectivity, as it drives business and society, bringing communities and commerce together. That's why we use our insight and experience to connect people and companies, anywhere in the world.

## Our services

Our team of consultants advise public and private sector organisations on the strategy, procurement and implementation of digital technology and connectivity infrastructure.

## Areas of Expertise

We specialise in a wide range of areas, including 5G, Digital Connectivity, Enterprise IT, Net-Zero, Networking, Technology-Enabled Care, Smart Places, GIS and more.

The approach that makes us go further:



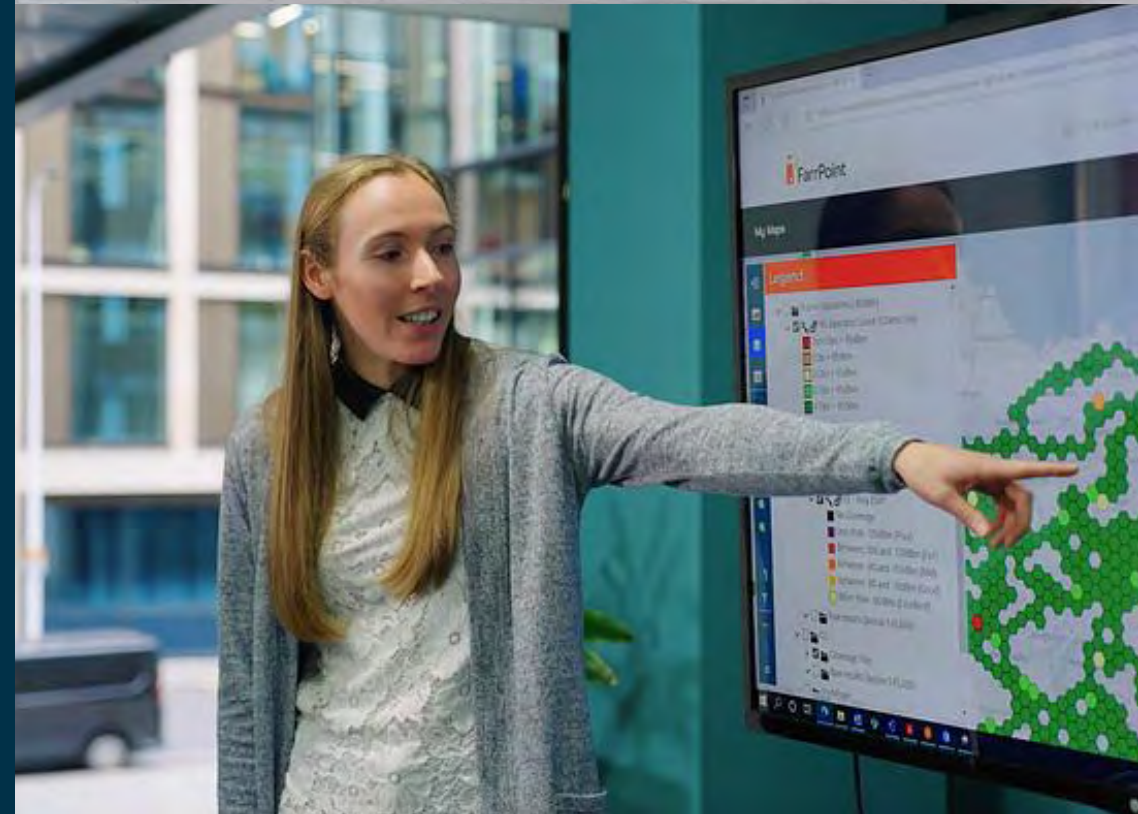
PRAGMATISM



EMPATHY



DUTY OF CARE





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