![FarrPoint logo]

INDEPENDENT SURVEY

FarrPoint Digital Connectivity Survey 2025

January 2025

Certified B Corporation

Contents

Executive Summary

This is FarrPoint's third Digital Connectivity Survey, where we examine Local Authorities' (LAs) priorities, progress observed, thoughts and challenges in relation to digital connectivity.

The survey shows that connectivity remains a critical but evolving priority for many LAs. While digital connectivity strategies are still considered important, many are now outdated, and the number of LAs without a strategy is growing. There is awareness from LAs about the need to review and update their digital connectivity strategies to better reflect the evolving technological landscape.

There remains a focus on fixed (superfast as a minimum) and 4G connectivity, and progress has been made on this, but there is also a growing awareness and recognition of the importance of 5G. There has been a shift away from the notion of LAs needing 4G coverage before 5G rollout. LAs see significant potential for 5G across various sectors, including social care, healthcare, and transport.

Connectivity data and mapping challenges persist and are hindering efforts to address remaining coverage and capacity gaps. LAs noted it was difficult to access accurate and reliable data on mobile and fixed connectivity, and if provided, it often does not match realities on the ground, lacking the required granularity or taking too long for them to gain access.

LAs also identified that a lack of funding and skills gaps continued to hinder progress within their regions. Government funding remains crucial for LAs to undertake major connectivity projects, but many flagged challenges in securing funding and finding skilled personnel. Many LAs noted the Digital Champion role as being critical in helping support the roll-out of digital infrastructure, however, it faced challenges. There is significant confusion about the role and definition of digital champions, and LAs can struggle to fund and staff these positions effectively.

Take-up and adoption of connectivity solutions and technology remain a key area of focus. Whilst various digital inclusion initiatives are underway to improve take-up and adoption, challenges remain with businesses and residents. This includes a lack of service availability, affordability, awareness about solution availability and the digital skills gap.

There is declining focus on the links between digital and net-zero. While LAs acknowledge the likely contribution digital connectivity can make to achieving net-zero targets, limited resources and internal buy-in hinder progress in this area.

The majority of local authorities declared interest in data centre development in their regions, but half haven't yet investigated the opportunities. Only a small number of councils are actively pursuing investment and developing a dedicated local data centre strategy.

LAs are generally confident in their understanding of the PSTN and 2G/3G switch-off, but their focus is primarily on internal operations and service users, somewhat neglecting wider regional impacts. Similarly, while LAs are taking steps to improve network resilience, their efforts are predominantly focused on internal operations, with limited consideration for wider regional network resilience.

Finally, smart places initiatives face challenges. High perceived costs, resource limitations, and internal funding constraints hinder the deployment of smart technologies, although there is growing recognition of the potential benefits in areas like healthcare and transport.

Foreword

Mark Hawthorne MBE

COUNCILLOR, GLOUCESTERSHIRE COUNTY COUNCIL
LGA DIGITAL LEAD – 2025

I'm delighted to provide this introduction to FarrPoint's latest annual survey of local authority progress and plans for connectivity.

As someone who has served in local government for 24 years, it's clear that "Digital" is playing an increasingly key role in our local economic strategies, our drive as a sector to make productivity gains and our need to solve the challenges of frontline services like Adult Social Care.

Whilst this FarrPoint report indicates significant progress has been made in delivering the enabling infrastructure that underpins this, there is of course always more to do. My involvement with the digital agenda started in 2011 when Gloucestershire and Herefordshire Councils became the pilot area for the then Superfast programme. We called it "Fastershire" and over its 13 years it increased the number of premises getting 30Mbps from 36% to 98.2% when the project finally closed last Spring. Thanks to a mix of altnet and traditional providers, 77% of Gloucestershire now enjoys gigabit capable speeds, including huge swathes of our rural heartlands.

My role in helping to deliver that local programme and in being the LGA Digital member lead for the past 10 years, has made it clear to me that Local Government is key to successful delivery on the ground. That's why for the last decade, I've been a strong advocate for digital champions, but as this year's FarrPoint survey highlights there is increasing confusion over what that digital role means – a confusion born because the nature of the challenge is changing.

In Gloucestershire we've recently launched a new Digital Strategy 2025 – 2028. It identified the need to a) support providers in the delivery of fixed and wireless infrastructure (the traditional barrier busting champion role) and b) to support digitally excluded individuals and communities, helping them get online so they can access public services (the digital inclusion champion role).

Utilising gainshare funding from our original BT superfast contract and by pooling funds from the NHS and Adult Social Care, we have been able to recruit to two distinct but connected digital champion teams. We used to take about "digital by default" as if it was a choice. Now we know digital is the future of public service. So, making sure we support removal of barriers to access and support residents in obtaining the right online skills is as important as ensuring our communities get the physical infrastructure they need to get online.

The FarrPoint survey results highlight that there is still a degree in inconsistency in what councils see as their digital agenda. Many don't include connectivity infrastructure in their strategies, only one-fifth are pursuing data centre investment and just under 50% understand and have explored smart places.

Unlike well-established disciplines like Highways, Digital often struggles to find the right home within an organisation with an already overwhelming agenda. That's why getting central government backing and financial support is vital. While my own council has been able to make the case for digital champions, not all councils are financially well placed to make that commitment. If government is to fulfil its ambition for growth, connectivity, and AI, it needs local council on board and driving digital growth over multiple workstreams.

Reading this report, I'm struck by how far this agenda has changed from the early days of the Superfast programme back in 2011. And while the survey shows there is still much to do, I'm optimistic that with local government and the industry working together we can continue to learn from each other, lobby government for the right investment and find the right solutions to achieve our shared goals of boosting the economy, transforming service delivery and improving the lives of all our residents.

Introduction

Dr. Andrew Muir

CEO, FARRPOINT

Now in its third year, our Digital Connectivity Survey provides an annual overview of UK local authorities' progress and the perspectives of their digital leaders.

We are grateful to all the respondents who provided their views, and it was particularly nice to see a spread from across the four nations, including increased input from Northern Ireland representatives.

The survey results show continued progress with the fundamentals of connectivity – fibre and good 4G mobile. Of course, more is always needed, and investment and effort need to continue to keep pace with both advancing technology capabilities and the need to connect everyone.

It's essential, therefore, for local authorities to maintain a focus on connectivity, and a connectivity strategy is a good base on which to build. We know resources are stretched, but connectivity is too important an enabler for economic growth not to be invested in locally as well as nationally.

This local involvement will be needed as the continued expansion of 5G takes place and the increased developments around data centres raise pros and cons for local areas, all of which need to be considered. Change and opportunity will continue, with 30 years in telecom consultancy, I can vouch for this personally!

Collaboration between local authorities and connectivity providers can be a challenge as they may not understand each other's drivers and priorities. We believe connectivity delivery could be greatly improved to everyone's benefit by investing in these relationships and digital

champions will be key to this. Hopefully 2025 is the year that this gets appropriately resourced. Our survey shows the continued recognition from respondents on the range of benefits connectivity can bring across sectors and gives insight into the challenges and forward priorities for this next year. We would encourage everyone to review the results, learn from each other and reach out if you have any further observations.

Breakdown of Local Authority Responses:
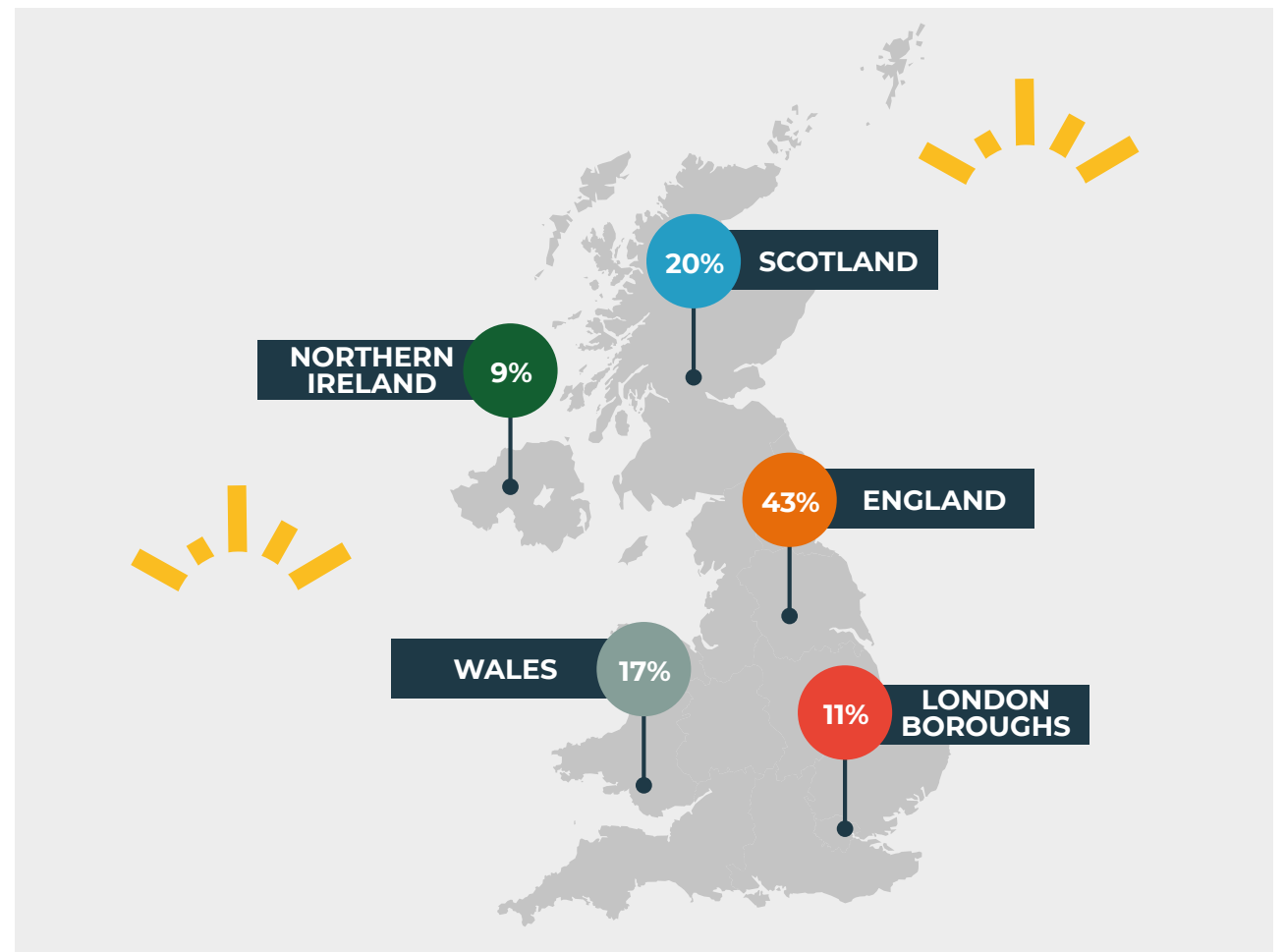
Strategy and Planning

Strategy and Planning

Q.1 WE ASKED IF LOCAL AUTHORITIES HAD **DEVELOPED A DIGITAL CONNECTIVITY STRATEGY** AND IF SO, **HOW OLD THAT STRATEGY WAS**.

40%	**29%**	**13%**	**18%**
Yes, our strategy is less than 3 years old	Yes, our strategy is older than 3 years	We are currently developing our strategy	No, we don't have a strategy

Only 40% of respondents reported having a digital connectivity strategy in place that is less than three years old, with nearly 50% of respondents answering they either had a strategy over 3 years old or without a strategy in place. This could be attributed by some to shifting council priorities and changes in leadership

These findings suggest a weakening of strategic focus on digital connectivity within local councils.

"Digital isn't represented highly enough in senior leadership anymore. We're always put in the savings rounds and having to find these"

"Our strategy was getting a bit out of date. We've had one drafted, but it's still not been agreed and implemented"

"We have a digital strategy, but it doesn't cover connectivity as this was normally under economics...but this will soon change as it will all come under IT"

Q.2 WE ASKED LOCAL AUTHORITIES WHAT THEIR DIGITAL PRIORITIES WERE FOR 2025.

Rank	Priority
1st	More areas covered by gigabit broadband
2nd	Ensuring 100% of premises in the area have at least superfast connectivity
3rd	More areas covered by 4G
4th	More areas covered by 5G
5th	Encouraging adoption of available digital connectivity and services by residents and businesses
6th	Developing new smart places (IoT) projects
7th	Ensuring digital connectivity is aligned with net-zero targets

Consistent with previous surveys, local authorities are prioritising gigabit broadband rollout and ensuring minimum superfast connectivity is available for all premises. This is driven by the recognised importance of affordable, fast, and reliable fixed connections for social inclusion and addressing digital exclusion.

Mobile connectivity, especially 4G due to its broader reach and importance for those without fixed broadband, remains a key focus. Whilst 5G was the leading priority for roughly one-sixth of respondents, primarily for economic development and innovation (aided by initiatives like 5GIR), greater investment is still needed.

Encouraging take-up and adoption is also a significant concern (a top three priority for over a third of respondents), seen as crucial for realising the full benefits of infrastructure development. Smart places and net-zero/sustainability remain lower priorities, with authorities primarily focused on delivering core connectivity infrastructure.

> "Our main priorities are 4G roll-out and Project Gigabit"

> "Our main focus is ensuring 100% of premises have superfast connectivity and increasing rates of service adoption"

> "4G and 5G are less of a focus or priority for us because we have less influence over this"

> "Personally, I don't think people truly need Gigabit. If you are that desperate for such high bandwidth, you'd likely just buy your own leased line"

> "It's all about improving public services but also, you can't suddenly go 'digital first' if half your community can't use digital services"

Q.3 WE ASKED HOW IMPORTANT CENTRAL GOVERNMENT FUNDING IS TO DIGITAL INNOVATION IN THEIR REGION.

55%	34%	8%	3%
Essential – we couldn't innovate without it	It's useful to compliment our own initiative	We'd like to get funding but have not secured any to date	We do not pursue any central funding

A new survey question on central government funding's role in local digital innovation revealed that for 55% of local authorities, such funding is essential for their current level of innovation in digital connectivity.

While 34% consider it helpful but not essential, they acknowledge they couldn't undertake projects such as 5G and FTTP initiatives alone. Only 8% have yet to secure funding, despite actively pursuing it after previous rejections.

These results underscore the vital role of central government funding in supporting digital connectivity infrastructure development across the UK.

Q4. WE ASKED IF LOCAL AUTHORITIES HAVE A DIGITAL CHAMPION.

Yes, this is a dedicated role tasked with helping achieve the organisation's digital strategy / vision for the area — 42%

Yes, but this is an add-on area of responsibility to an existing role — 34%

No, but this is something we want to explore further — 19%

No — 5%

Over three-quarters (76%) of surveyed local authorities now have a digital champion, reflecting growing recognition of their value in supporting digital connectivity. However, close to one quarter still lack one or are at the stage of being interested in further exploring the role.

There's some confusion around the definition and responsibilities of a "digital champion," with interpretations ranging from internal digital evangelists to those focused on who solely focus on digital inclusion. The role also varies in practice, sometimes being a dedicated position and other times an added responsibility to an existing role.

Where established, digital champions are considered able, leading telecoms market engagement, infrastructure rollout project management, internal council advocacy, community engagement, and helping overcome barriers to connectivity development. One authority noted a councillor had assumed the title without the necessary skills, raising concerns about political motivations and effectiveness at engaging with the market.

Funding and resourcing for these roles remain a key issue, with some authorities providing dedicated funding and teams while others have only a single champion within existing services. There is a risk that without a suitable digital champion in place, digital connectivity deployment could be hampered by an inability to facilitate the necessary interactions between the market, council departments and local communities.

"I think a Digital Champion needs to be a senior, paid role within the Council and not something for elected members, who can use the position for their own political gain"

"We have this role at the moment, but it will be hard to keep it going when the funding ends. It will be hard to internally justify this as a new permanent post within the council"

"Its not clear cut what a digital champion is. The language around this is confusing and it can sometimes just be a volunteer role within organisations."

"He isn't a dedicated digital champion, but it does sit within his current role"

"For us, the main responsibilities for the Digital Champion are dealing with suppliers, pushing projects forward and engaging with stakeholders"

WE ASKED ABOUT HOW DIGITAL CONNECTIVITY IS VIEWED WITHIN THE ORGANISATION, IS IT SEEN AS A KEY ENABLER AND A PRIMARY OBJECTIVE – TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?

Q.5

Legend: Strongly Disagree ● Disagree ● Agree ● Strongly Agree ●

Chart categories:
- Digital infrastructure plays a fundamental role in enabling the region to remain competitive
- My organisation needs to do more to understand the current connectivity levels within our region
- My organisation treats improving digital infrastructure as a primary objective within our current regional strategy
- My organisation will rely on the market to deliver digital infrastructure and does not plan to directly intervene
- My organisation does not see digital infrastructure deployment as a priority for the region

X-axis: 100% — 0% — 100%
Percentage of Reponses
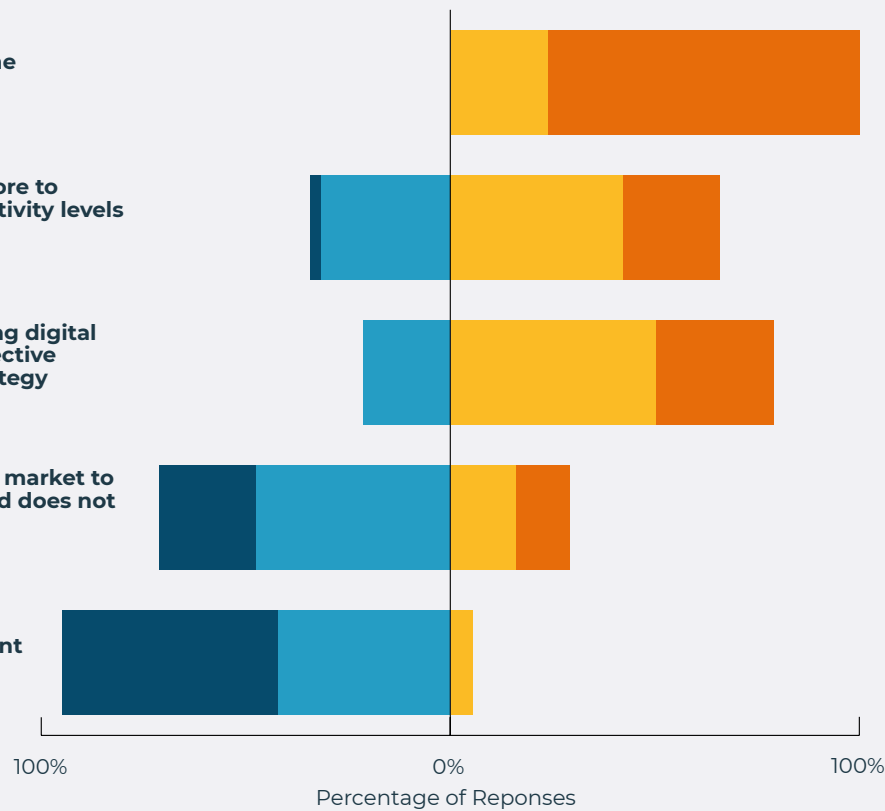
As with previous years, local authorities unanimously agree that digital infrastructure is fundamental to regional competitiveness, citing its critical importance for households, schools, businesses, and entire sectors.

There is widespread recognition of the need for regional connectivity improvements, with two-thirds acknowledging the need for a better understanding of current connectivity levels, particularly regarding fibre rollout and mobile coverage/capacity. Authorities expressed frustration with data access from telecom providers and the inaccuracy of available data from Ofcom/government, especially for mobile coverage.

While few respondents disagree that digital connectivity is a primary objective, there was a mixed response about relying solely on the market for delivery, highlighting the recognised need for direct council engagement with telecom providers to improve local connectivity.

It is clear from our survey results, that Digital infrastructure continues to be seen as vital to ensure regional competitiveness, economic growth and delivery of vital public services. Despite that, there is a sense this year that digital connectivity is struggling to 'find a home' within local authorities due to budgetary pressures. Is it part of the IT team, is it part of economic development - the views vary widely. Without support from senior leadership, a clear digital strategy and appropriate resources assigned there is a risk that these positive outcomes might be undermined.
STEVE SMITH, PRINCIPAL CONSULTANT, FARRPOINT

Q.6 WE ASKED WHAT ROLE SUSTAINABILITY OF RESOURCES AND EMISSION REDUCTION PLAYED IN LOCAL AUTHORITIES' DIGITAL STRATEGIES.

13% — Very important, we have defined net-zero targets and understand how digital connectivity influences our drive to net zero

63% — We understand it will play a role, but we have not calculated how digital connectivity influences our drive to net zero

8% — We know this will be important, but we don't know how / need more guidance

16% — Not important to the digital department and it's something that other departments will look after

While awareness of digital connectivity's role in emissions is high, actual activity linking digital connectivity to net-zero targets is limited.

The proportion of authorities who have defined net-zero targets and understand the link to digital connectivity is only 13%, and those deferring responsibility to other departments is 8%. Overall, despite acknowledging the connection, digital teams within local authorities generally view this area as outside their direct remit or lacking sufficient resources for dedicated action.

"We do contribute to the climate change data in the council. There is an element of accountability, but nothing on that really looking at external benefits"
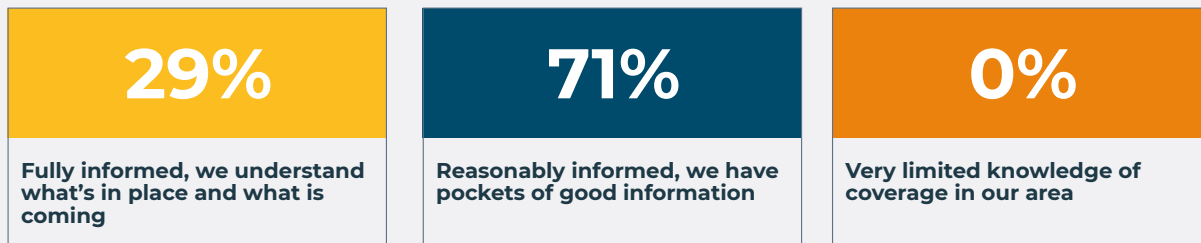
"It should be a top priority; I'm not saying it isn't, but we haven't got our head around how we could measure this"

"The sustainability it doesn't feed into decision-making around digital yet, but it could do soon. At the moment the target is on 2040, and IT could soon start contributing to this"

"I've tried to engage with Building and Management Services in the council about this [role of connectivity in helping reduce emissions], but they don't seem keen. I think it's because they would have to learn a new skill and they don't have time or knowledge to do this"

Q.7 WE ASKED HOW GOOD LOCAL AUTHORITIES' KNOWLEDGE OF DIGITAL CONNECTIVITY COVERAGE WAS IN THEIR AREAS.

29%
Fully informed, we understand what's in place and what is coming

71%
Reasonably informed, we have pockets of good information

0%
Very limited knowledge of coverage in our area

The number of respondents who felt fully informed about digital connectivity coverage in their region is lower than expected at 29%, although no respondents had only limited knowledge.

Mobile coverage appears a particular problem. Local authorities highlighted challenges with data which can show areas of mobile coverage which is quite different from the consumer experience on the ground. Local authorities who had a history of working with providers on digital connectivity projects noted this had allowed them to develop a clearer understanding of coverage, and maintaining good relationships helped to understand providers' build plans. However, some respondents reported that gaining a complete understanding of coverage within their area was difficult, with providers and other holders of data being unwilling or slow to share this information.

> "Members want us to contact all MNOs and find out why there is no signal. But this is difficult with all the other 200 jobs I have to do"

> "We have a general view of fixed and mobile but only pockets where we have a more detailed picture"

> "We have questioned the claims of the Shared Rural Network regarding total coverage. The user experience is very different to what the SRN and MNOs claim"
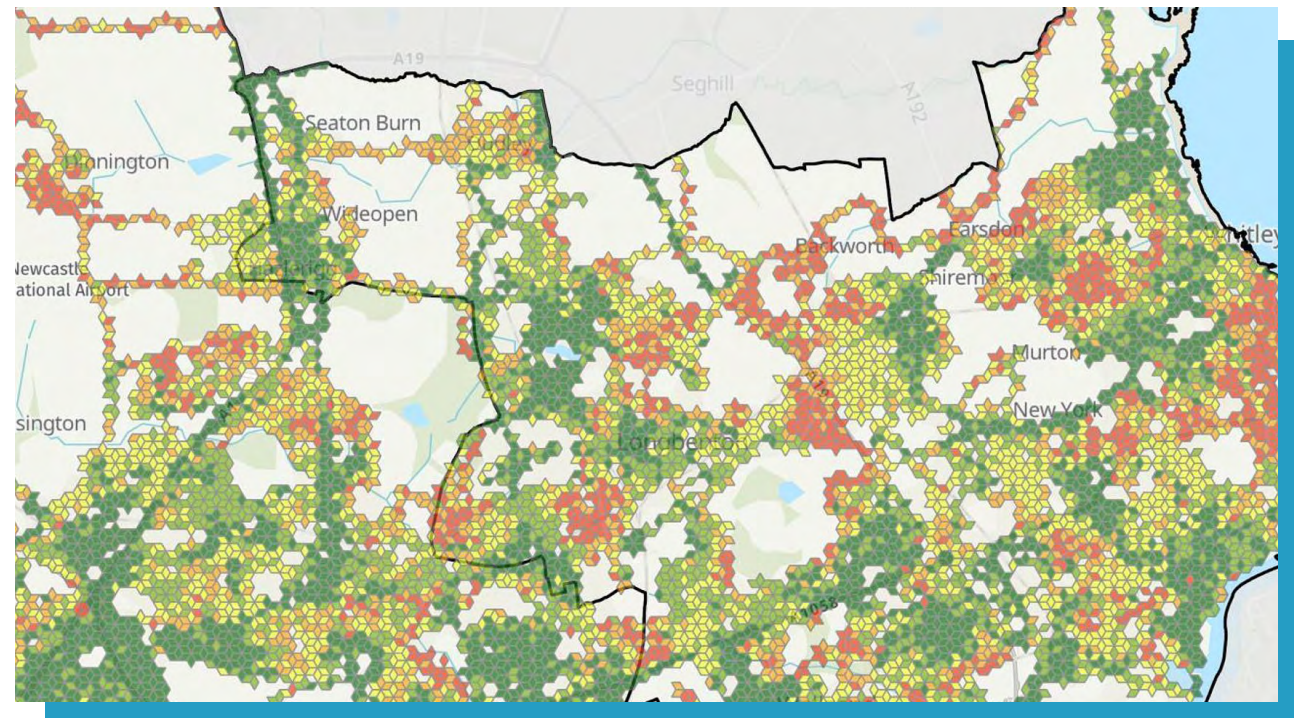
> "We take the maps that operators give us with a massive pinch of salt"

> "Ofcom don't check data from mobile data operators, it's very different on the ground"

Progress and Challenges

Progress and Challenges

Q.8 WE ASKED WHERE LOCAL AUTHORITIES SAW THE MOST PROGRESS IN CONNECTIVITY IN THEIR AREA IN 2024.

1st More areas covered by gigabit broadband

2nd More areas covered by 4G

3rd Increased adoption of available digital connectivity and services by residents and businesses

4th More areas covered by 5G

5th More smart places / IoT innovation

6th Ensuring digital connectivity is aligned with net-zero targets

As seen in previous years, increased gigabit broadband coverage, driven by Project Gigabit and initiatives like the Shared Rural Network, remains the area of greatest connectivity progress reported by local authorities.

Progress in 4G coverage has also increased, attributed to MNO efforts, including small cell deployments in urban areas and shared infrastructure projects in rural areas. Progress in 5G coverage, though slower, is gradually improving.

Adoption and take-up remain areas of ongoing focus, with less progress noted in 'smart' places / IoT innovation or ensuring alignment with net-zero targets.

"We've made so much progress in the last year in terms of improving connectivity in the region, this has been exciting and a crazy at the same time"
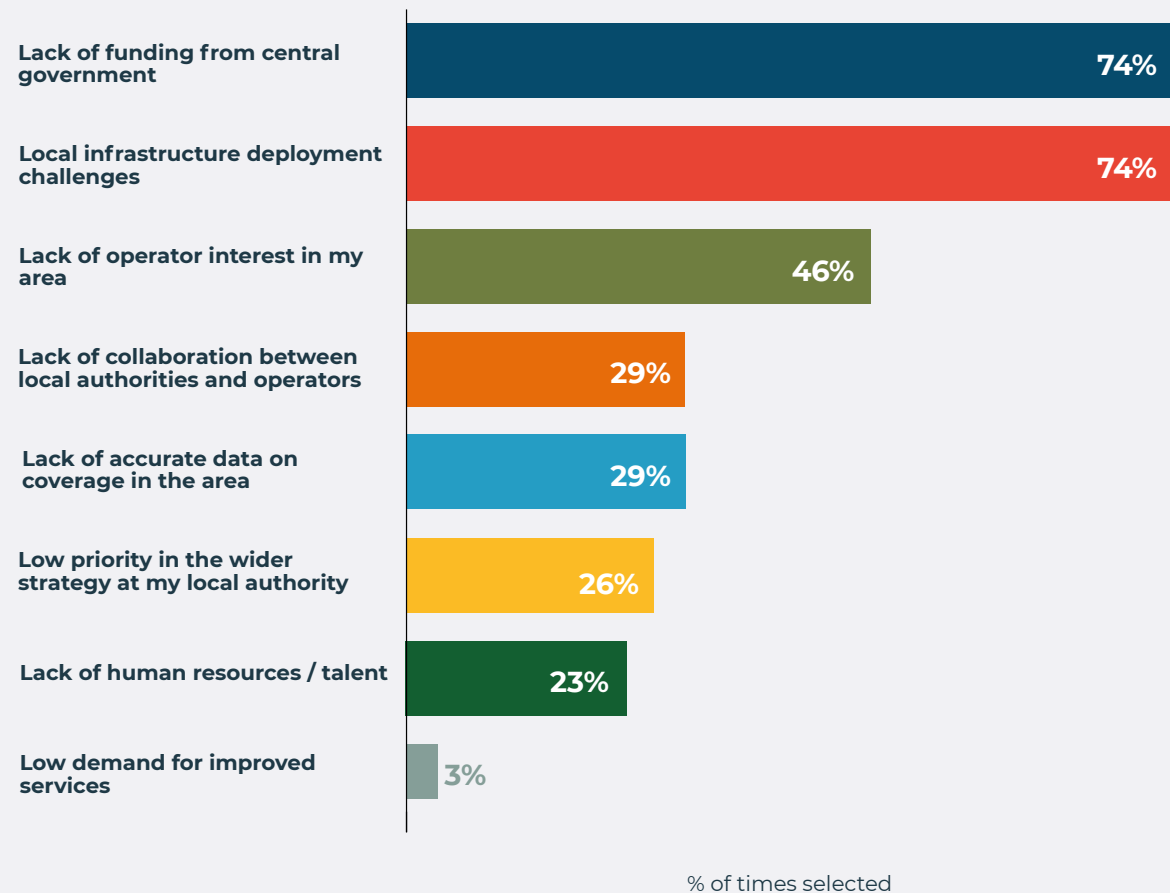
"We are doing lots of bits such as R100, the Sharen Rural Network and Project Gigabit, which is great, but I don't think we're really brining along the public with this journey"

"Barrier busting group learnings have really worked for us, it's a shame it has come to an end"

"We did have a 4G problem before, but the infill program really helped with this"

Q.9 WE ASKED WHAT THE MAIN BARRIERS WERE FOR IMPROVING CONNECTIVITY IN THE LOCAL AUTHORITIES' AREAS.

Lack of funding from central government — 74%

Local infrastructure deployment challenges — 74%

Lack of operator interest in my area — 46%

Lack of collaboration between local authorities and operators — 29%

Lack of accurate data on coverage in the area — 29%

Low priority in the wider strategy at my local authority — 26%

Lack of human resources / talent — 23%

Low demand for improved services — 3%

% of times selected

Despite ongoing efforts, challenges to improving digital connectivity persist.

Consistent with 2024 findings, the primary barriers identified by local authorities are insufficient central government funding and local infrastructure deployment difficulties.

Lack of consistent funding hinders leadership buy-in and staffing for connectivity projects, while perceived lack of interest from telecom operators, despite council engagement, also presents a significant obstacle.

"The biggest barriers internally are a lack of resource to fund a particular role or even if we can fund this, someone having the skills and knowledge do carry it out"

"We as councils should be doing more to support connectivity rollout, at the moment we are a major barrier in terms of planning and getting wayleaves approved.

"FarrPoint's Connectivity Survey remains essential reading for all those involved in the rollout and adoption of advanced digital connectivity. While great progress has been made in recent years, further work is required to address remaining challenges identified in the report, such as the need for a clarified definition of the digital champion role and local barriers to infrastructure deployment. The Digital Connectivity Forum is committed to working collaboratively with FarrPoint, local and central government, and the telecoms industry to address remaining blockers as well as to increase understanding of the transformational potential of high speed fixed and mobile connectivity."
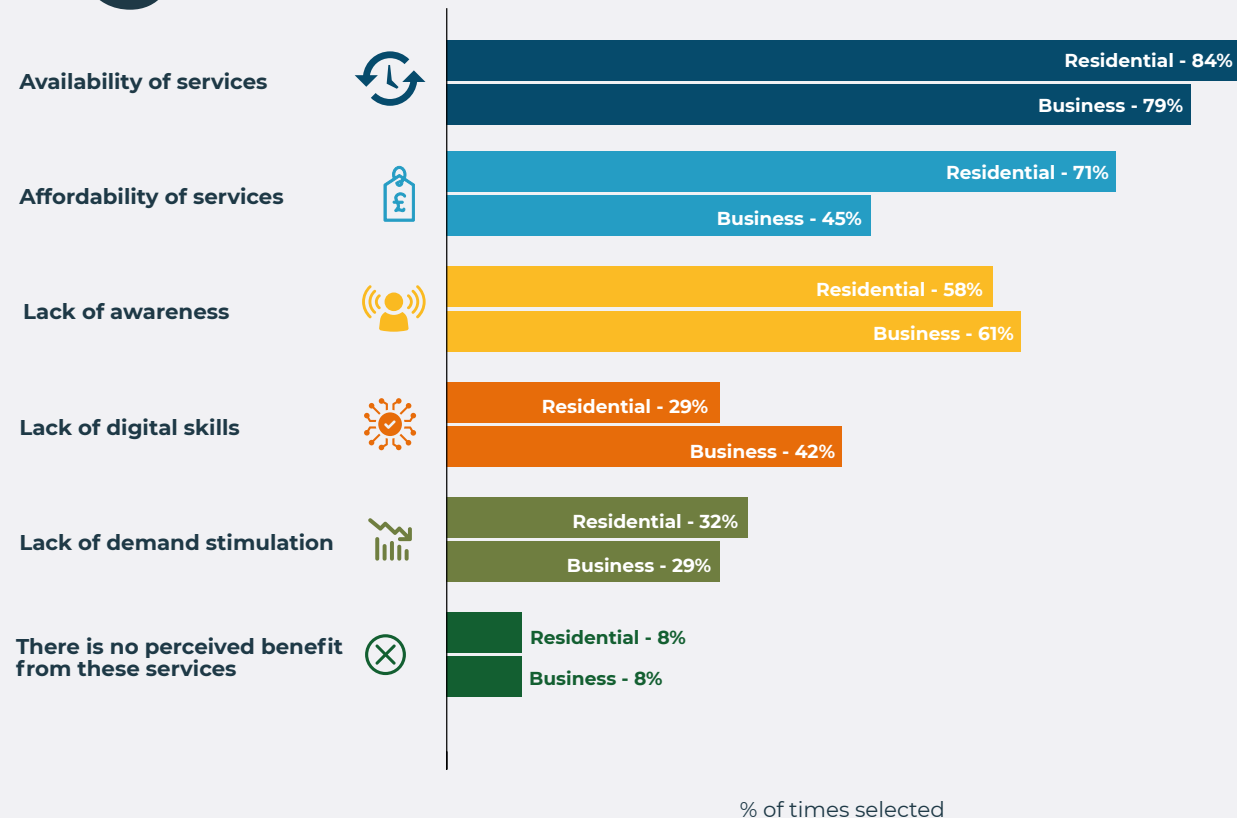**ALEX MATHER, HEAD OF DIGITAL CONNECTIVITY FORUM**

> *"Skills and knowledge gap are the biggest challenge for take-up in our region"*

> *"Biggest barriers are the availability of service, especially in business parks. Providers feel they won't see a commercial return on delivering improved broadband"*

> *"There is a huge digital skills issue for our residents and businesses"*

Q10. WE ASKED WHAT ARE THE BARRIERS TO ADOPTION OF DIGITAL CONNECTIVITY IN YOUR AREA.

Availability of services
- Residential - 84%
- Business - 79%

Affordability of services
- Residential - 71%
- Business - 45%

Lack of awareness
- Residential - 58%
- Business - 61%

Lack of digital skills
- Residential - 29%
- Business - 42%

Lack of demand stimulation
- Residential - 32%
- Business - 29%

There is no perceived benefit from these services
- Residential - 8%
- Business - 8%

% of times selected

Simply providing digital services is insufficient; adoption by residents and businesses is crucial for realising connectivity's full benefits. The survey results revealed similar adoption barriers for both groups: service availability, affordability, and awareness.

Limited service availability directly hinders uptake, while affordability of fixed and mobile packages, exacerbates digital exclusion, highlighting the need for suitable social tariffs. Lack of awareness about available solutions, providers, and potential benefits also significantly impacts adoption.

Finally, a lack of digital skills, compounded by low motivation, confidence, and access to equipment, further prevents residents and businesses from fully utilising digital connectivity and risks deepening digital exclusion.

Q. 11

HAS YOUR ORGANISATION UNDERTAKEN ANY EFFORTS TO IMPROVE TAKE-UP AND ADOPTION OF CONNECTIVITY OR DIGITAL TECHNOLOGIES?

81%	16%	0%	3%
Yes.	No, but this is something we'd like to do	No.	Unsure.
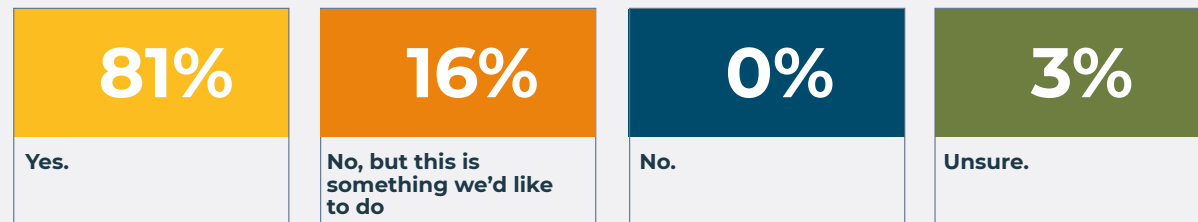
With ongoing infrastructure rollouts slowing, focus is shifting towards service adoption. The survey found over 80% of local authorities are actively promoting take-up, largely through digital inclusion initiatives like device loans, skills training, and social tariff awareness, benefiting both residents and council engagement.

However, 16% have yet to implement such measures due to resource constraints, lack of a clear strategy, and dispersed responsibilities within their councils.

> *"We mainly focus on the infrastructure rollout, take-up and adoption tends to be picked up by our combined authority"*

> *"I don't think we are doing nearly enough as we should do around take-up and adoption. We just don't have the money or time to do this though"*
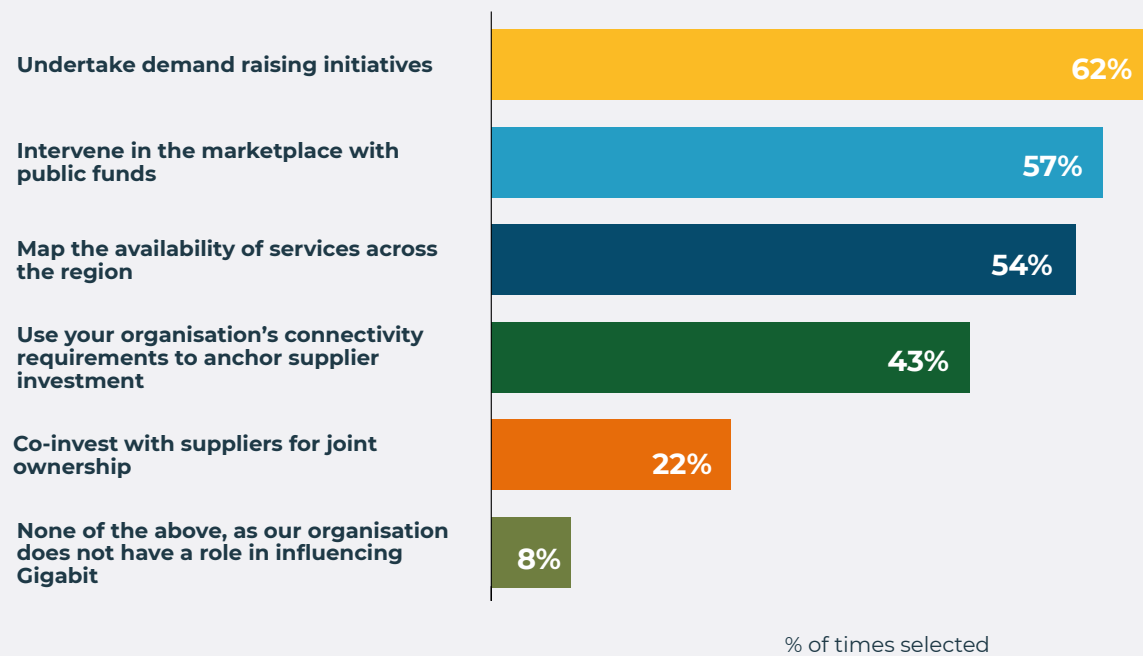
Digital Infrastructure

Digital Infrastructure

Q.12 WE ASKED WHAT LOCAL AUTHORITIES STILL **NEED TO DO IN TERMS OF IMPROVING GIGABIT** CONNECTIVITY.

Initiative	%
Undertake demand raising initiatives	62%
Intervene in the marketplace with public funds	57%
Map the availability of services across the region	54%
Use your organisation's connectivity requirements to anchor supplier investment	43%
Co-invest with suppliers for joint ownership	22%
None of the above, as our organisation does not have a role in influencing Gigabit	8%

% of times selected

"Sometimes getting more connectivity without knowing what you want to do with it is a problem"

Despite the Department for Science, Innovation and Technology's (DSIT's) central management of the national gigabit rollout via Building Digital UK (BDUK), local authorities retain some autonomy for complementary initiatives.

This year's survey, consistent with previous years, shows their focus remains on demand generation, although they acknowledge the need for greater support with service uptake and market intervention using public funds.

Improved regional service availability mapping is also a key priority, with respondents citing the inadequacy of existing coverage estimates and maps in reflecting residents' actual connectivity experience.

Q.13 WE ASKED LOCAL AUTHORITIES HOW THEY VIEW 5G AND WHAT SECTORS AND SERVICES COULD BENEFIT FROM THIS.

**Strongly Disagree** ● **Disagree** ● **Agree** ● **Strongly Agree** ●

5G is a high priority for my organisation and will play an important role in the delivery of our services to the public

My organisation sees 5G as a priority for businesses and economic development of our area

We need to ensure our area is fully covered by 4G first before investing more in 5G

5G is not a priority for my organisation

We believe that standalone 5G will deliver greater benefits to our region
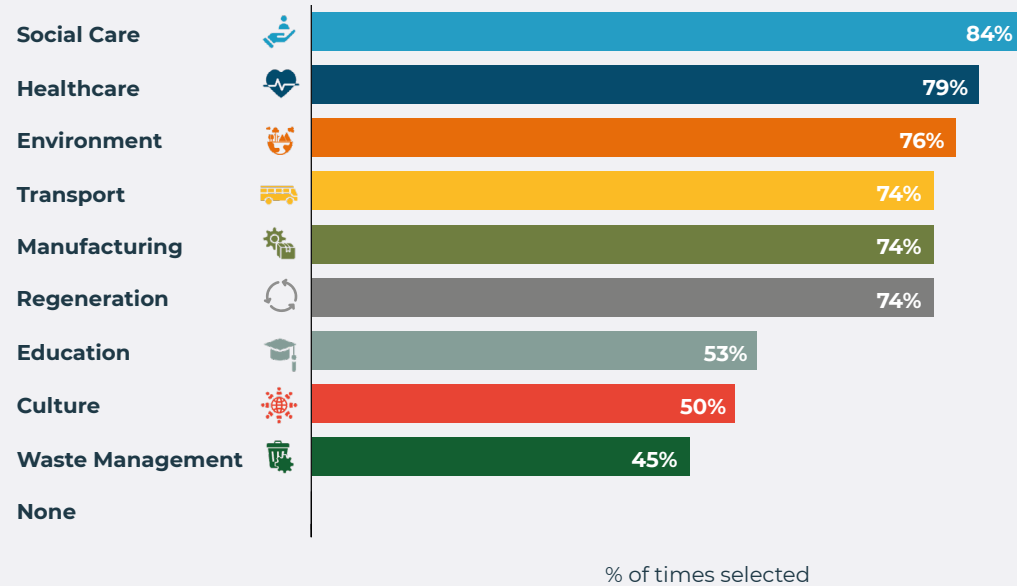
100%   0%   100%
Percentage of Reponses
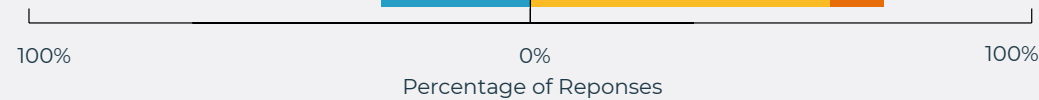
5G offers significant potential for supporting a diverse range of industries, including manufacturing, transport, healthcare, agriculture and construction. While the practical applications of 5G are still being explored, and the rollout of this technology across the UK is still at an early stage, there has been growth in the 5G market over the last year. There is also a shiftin the narrative associated with 5G technology from hype and over-promise, to a grounded understanding of the realities and benefits it can bring.

Survey results reveal a shift in local authority perceptions of 5G, with more respondents now prioritising it for service delivery and economic development compared to 2024. This increased confidence stems from 5G's transition from hype to tangible delivery, with emerging real-world applications and UK use cases demonstrating its benefits and aligning with regional economic goals. Consequently, fewer authorities believe complete 4G coverage is a prerequisite for 5G investment, recognising the increasing difficulty of addressing remaining coverage gaps (especially in very hard-to-reach areas) and the potential of 5G to address urban capacity constraints.

While some previous hesitancy and public scepticism remain, there is a growing acceptance of the technology, though continued stakeholder engagement is considered crucial for future 5G deployments.

"*Mobile was a major focus for us, especially for rural areas, and 5G is seen as playing a big part in that*"

Q.14 WE ASKED WHICH SECTORS/SERVICE AREAS DO YOU THINK WILL BENEFIT MOST FROM 5G IN YOUR LOCAL AUTHORITY.

Sector	%
Social Care	84%
Healthcare	79%
Environment	76%
Transport	74%
Manufacturing	74%
Regeneration	74%
Education	53%
Culture	50%
Waste Management	45%
None	

% of times selected

"Mobile UK welcomes the findings highlighting the importance of good mobile connectivity and the potential of 5G investment across different sectors. The findings highlight the importance of continuing efforts that can ensure fast and reliable mobile connectivity for all and raising awareness and understanding about 5G's transformative capabilities among local authorities. By providing the right information and support, we can empower local government and digital champions to drive innovation and deliver impactful services through 5G."

GARETH ELLIOTT - MOBILE UK
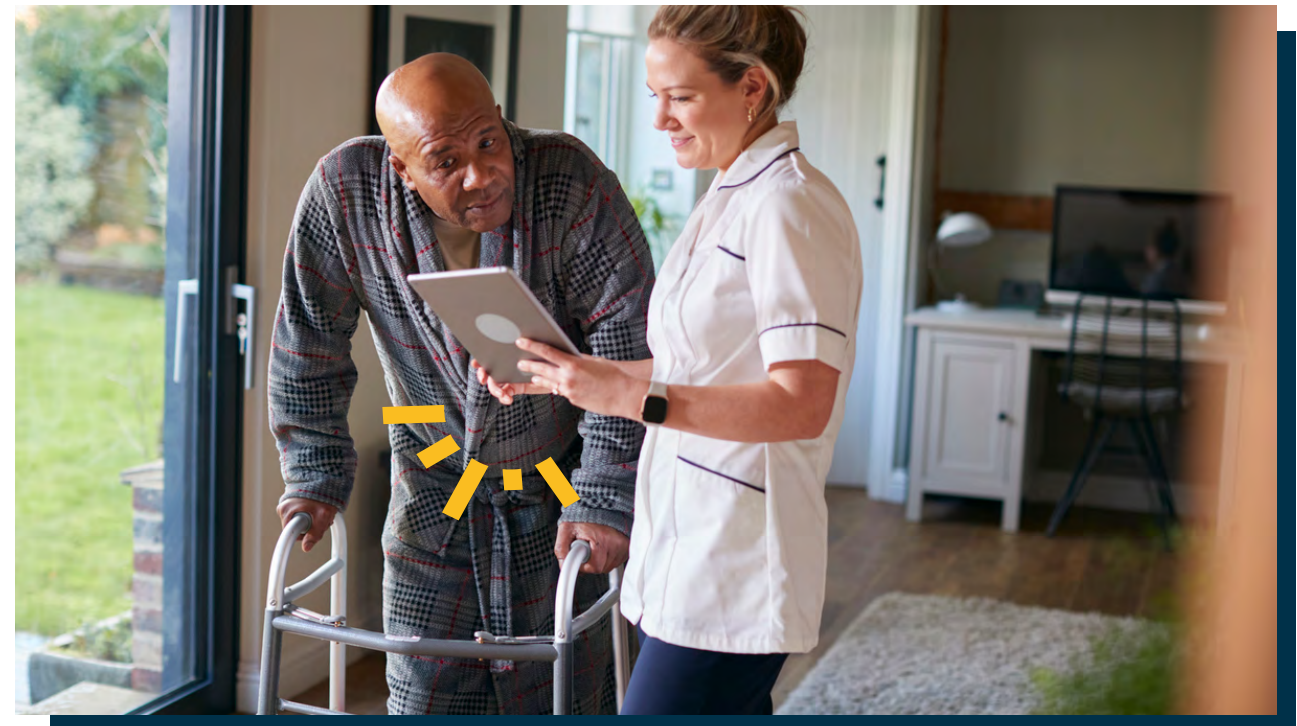**DIRECTOR OF POLICY AND COMMUNICATIONS**

Local authorities increasingly recognise 5G's potential across diverse sectors. The number of sectors identified as benefiting from 5G has consistently risen, with social care leading (over 84% of respondents), followed by healthcare, transport, environment, manufacturing, and regeneration (all over 74%). While education, culture, and waste management remain the least selected, their recognition has more than doubled.
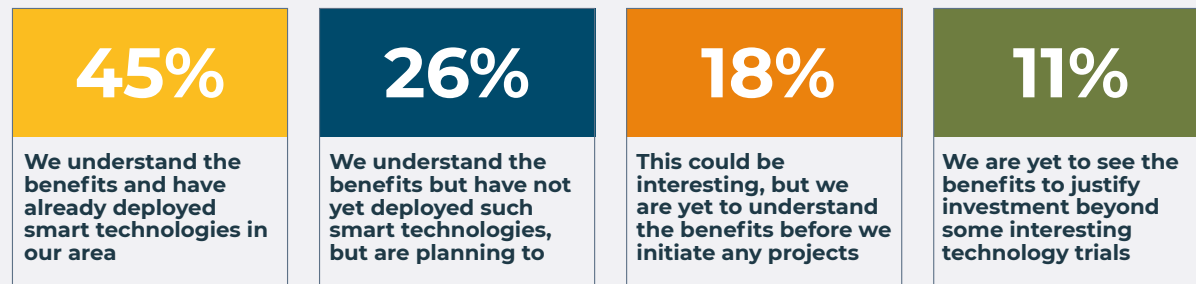
This growing awareness of 5G's capabilities, benefits, and limitations is attributed to access to case studies, trials, testbeds, and robust data, facilitating greater stakeholder buy-in.

Q.15 WE ASKED LOCAL AUTHORITIES ABOUT THE ROLE AND BENEFITS OF SMART PLACES (IOT).

45%	26%	18%	11%
We understand the benefits and have already deployed smart technologies in our area	We understand the benefits but have not yet deployed such smart technologies, but are planning to	This could be interesting, but we are yet to understand the benefits before we initiate any projects	We are yet to see the benefits to justify investment beyond some interesting technology trials

Smart places use technologies like IoT and advanced data analysis to improve efficiency, sustainability, and quality of life. While 45% of surveyed local authorities understand these benefits and have undertaken related activities (consistent with last year's findings), the remaining 55% have yet to deploy smart technologies or recognise the benefits in doing so. High costs, resource demands, and accessing the required expertise are key barriers, with local authorities noting the difficulty of securing internal funding without government support for projects and trials.

In addition, 11% remain unconvinced of the benefits justifying investment, highlighting the need for more compelling case studies showcasing the real-world impact of smart technologies.

"We have an appetite for developing smart places and using the associated technology, but we're just not there yet in terms of being able to fully engage"
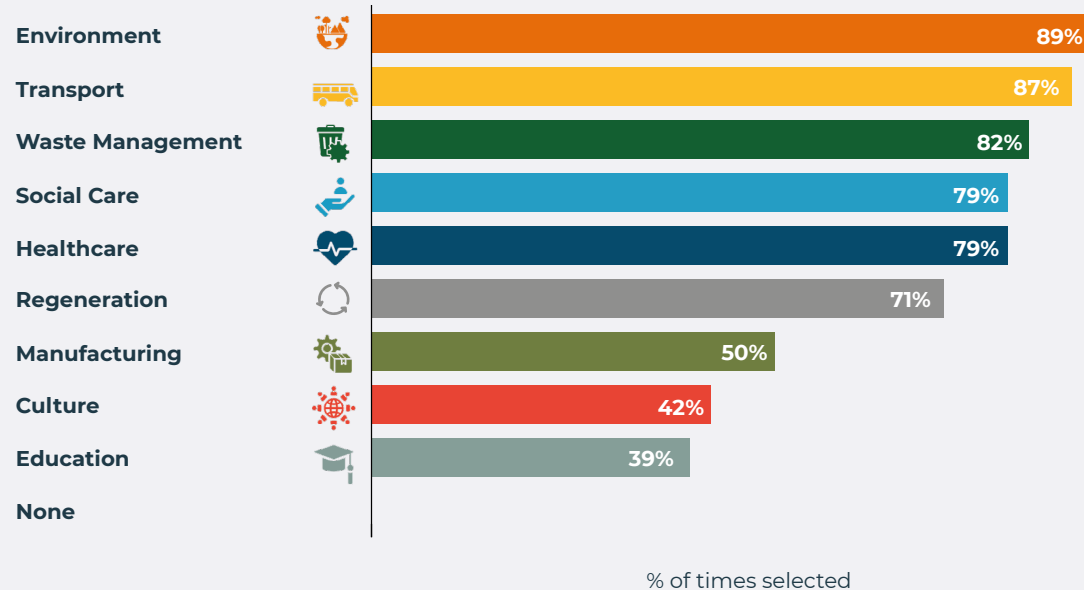
"Some of our previous projects around smart places were very much fund-driven rather than needs-driven. I think this has impacted our appetite for future work"

"A big focus for us in terms of smart and IoT is on our own estate and building management services, but I think an even bigger impact will be on healthcare and social services"

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Q.16 WE ASKED WHICH SECTORS/SERVICE AREAS DO YOU THINK WILL BENEFIT MOST FROM SMART PLACES (IoT) INNOVATION IN YOUR LOCAL AUTHORITY.

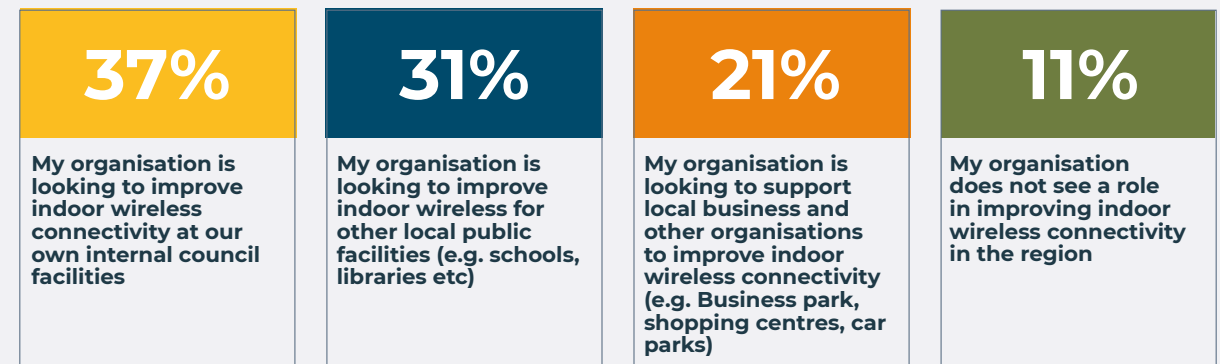| Sector	% of times selected
Environment	89%
Transport	87%
Waste Management	82%
Social Care	79%
Healthcare	79%
Regeneration	71%
Manufacturing	50%
Culture	42%
Education	39%
None	

% of times selected

Gathering and sharing insights on smart place projects and IoT deployment is crucial for local authorities to understand potential benefits across various sectors.

This year's survey shows increased awareness of these benefits, with over three-quarters of respondents identifying healthcare, social care, transport, environment, and waste management as key beneficiaries of smart place innovation.

This improved understanding of available technologies and sector-specific challenges, coupled with a notable increase in recognition of regeneration as a beneficiary, has provided greater clarity on where smart place innovation can have the most impact.

Q.17 WE ASKED LOCAL AUTHORITIES IF THEY WERE AWARE OF INDOOR CONNECTIVITY CHALLENGES IN THEIR REGION.

37% My organisation is looking to improve indoor wireless connectivity at our own internal council facilities

31% My organisation is looking to improve indoor wireless for other local public facilities (e.g. schools, libraries etc)

21% My organisation is looking to support local business and other organisations to improve indoor wireless connectivity (e.g. Business park, shopping centres, car parks)

11% My organisation does not see a role in improving indoor wireless connectivity in the region

Despite improved outdoor mobile coverage, indoor connectivity remains a significant challenge due to increased reliance on mobile devices within homes and offices. Issues like poor signal penetration and growing data demands highlight the need for solutions.

37% of local authorities are addressing indoor connectivity in their own facilities, with 31% extending this to other public buildings and an additional 21% to supporting local businesses. Only 11% see no role for their organisation in this area.

Stakeholders noted that despite infrastructure rollouts, indoor connection quality remains problematic, particularly in healthcare and transport, and is important for digital inclusion as mobile internet access becomes increasingly essential.

"Indoor connectivity is something that has come up. Both in terms of mobile and fixed, where people are getting fibre to the premises but suffering from awful internal connectivity to be able to maximise this"

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Data Centres

Data Centres

Q.18 WE ASKED LOCAL AUTHORITIES ABOUT THEIR THOUGHTS ON DATA CENTRE DEVELOPMENT IN THEIR REGION.

50%
We are interested but haven't yet investigated data centre impact

24%
We believe there are significant economic benefits to attracting data centres to our region

15%
We are actively engaging with data centre developers to attract investment to our region

4%
We are developing a data centre strategy for our region

7%
We do not see data centres beneficial to our region

Driven by the digital economy's growing need for data storage and processing, UK data centres have seen a surge in interest from both government and industry, recognising their strategic value for cloud computing, AI, data-driven decision-making, economic growth, foreign investment, and national data sovereignty.

The survey explored local authority engagement with this trend, finding that the majority have an interest in data centres and close to one-quarter believe there are significant economic benefits from attracting data centres to their region. However, whilst nearly 20% of local authorities are actively pursuing next steps when it comes to data centres, only 4% are in the process of developing a regional data strategy.

Many authorities (half of respondents) cite a lack of time, resources, specialist knowledge, and senior leadership support as barriers to fully investigating the potential impact of data centres , while a small minority see no regional benefit at all .The responses from local authorities spanned those from urban and rural areas, highlighting some of the common challenges shared between them.
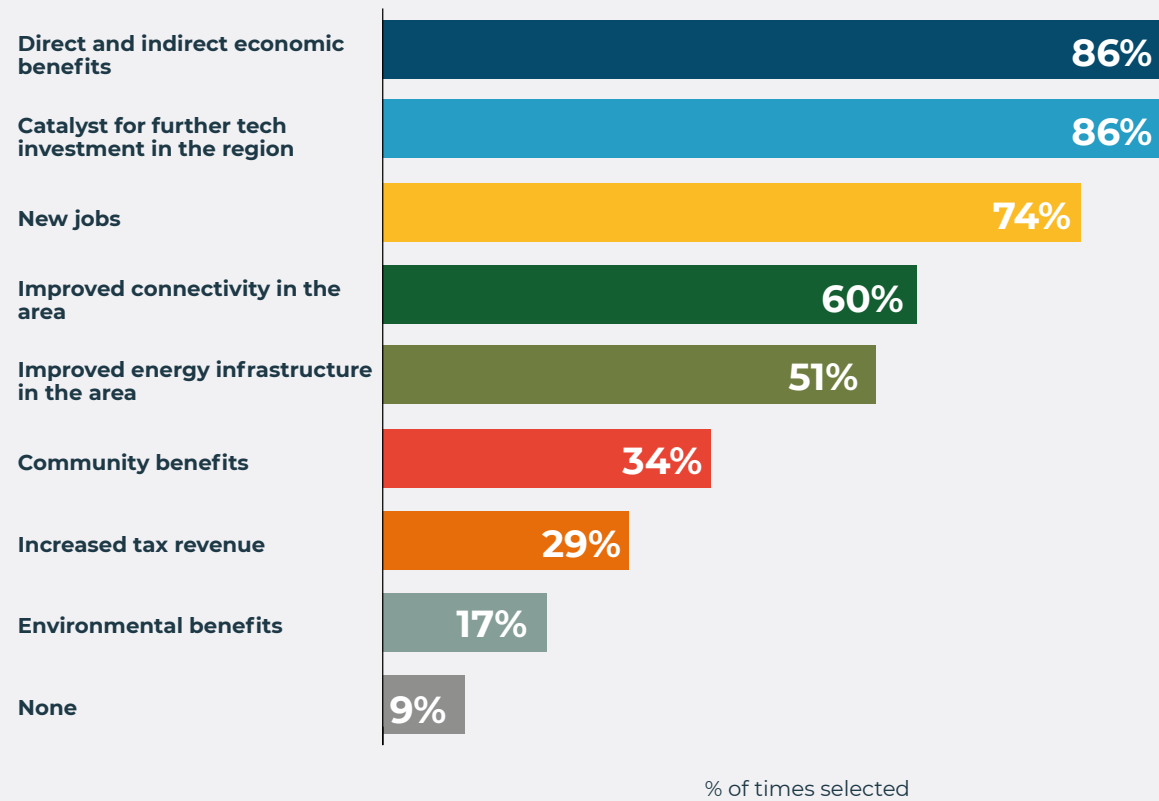
"I've got interest, but more from a personal perspective. It could be good for attracting private investment into the region"

"I don't think anyone has really thought about this at the council yet. It could be good but I'm sure we'd get lots of push back from MPs and Council members"

Q.19 **WE ASKED WHICH BENEFITS DO YOU THINK THE DEVELOPMENT OF DATA CENTRES COULD BRING TO THE REGION.**

| Benefit	%
Direct and indirect economic benefits	86%
Catalyst for further tech investment in the region	86%
New jobs	74%
Improved connectivity in the area	60%
Improved energy infrastructure in the area	51%
Community benefits	34%
Increased tax revenue	29%
Environmental benefits	17%
None	9%

% of times selected

"We're interested in data centres but we're not really investigating it too much. The big concern would be we spend a lot of resource on this for it to materialise into nothing"

Regarding the potential benefits of data centres, local authorities most frequently cited economic benefits and investment, viewing them as key infrastructure for attracting new businesses and providing secure, rapid data access. While job creation and improved connectivity were also mentioned, local authorities expressed less confidence in these outcomes.

Very few saw environmental benefits, and an even smaller number saw no regional benefits at all from data centre development.
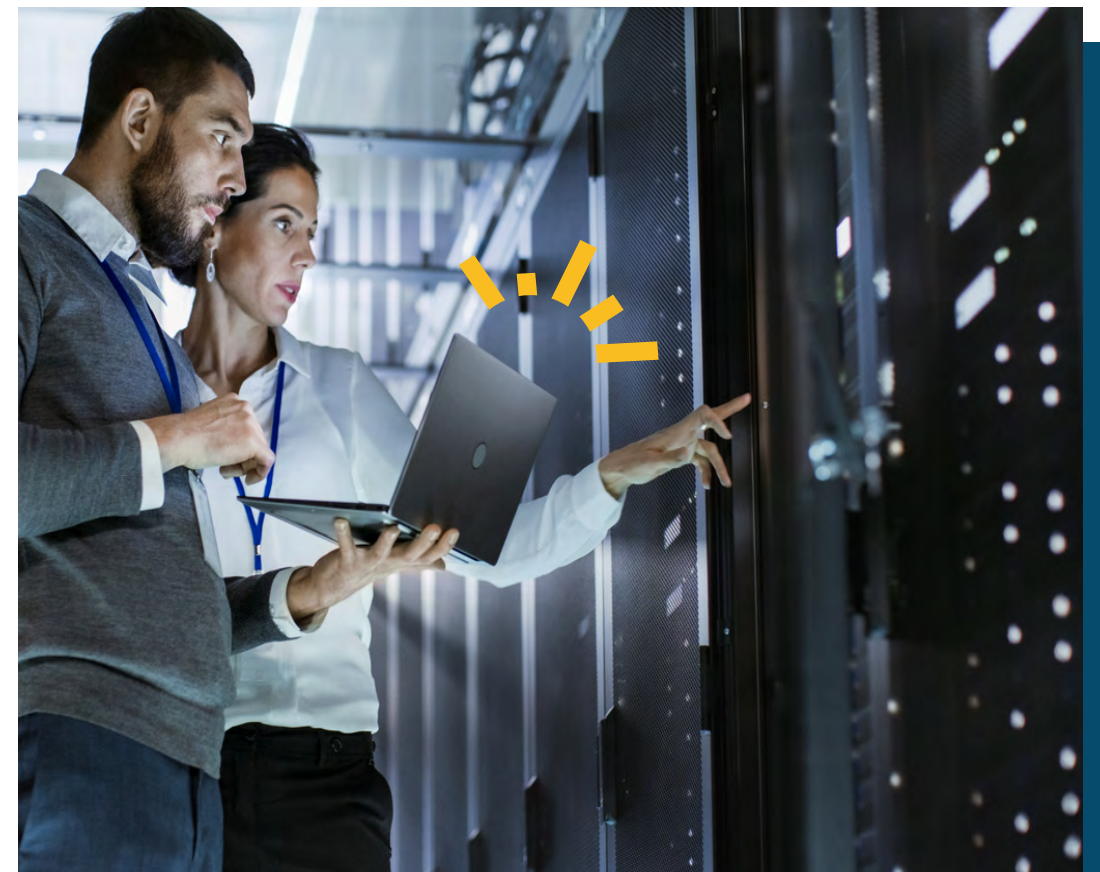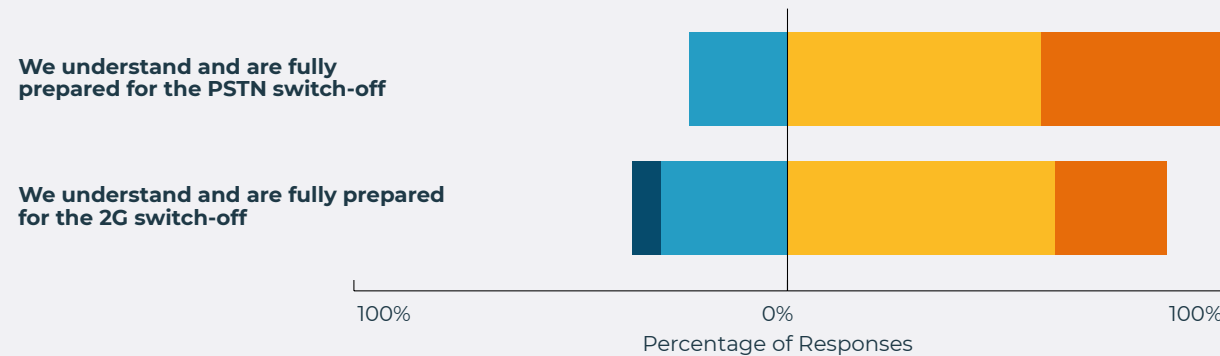
Sunsetting of Technologies

Sunsetting of Technologies

Q.20 WE ASKED LOCAL AUTHORITIES IF THEY AGREED WITH THE FOLLOWING STATEMENTS ABOUT SWITCH-OFFS.

● Strongly Disagree   ● Disagree   ● Agree   ● Strongly Agree

We understand and are fully prepared for the PSTN switch-off

We understand and are fully prepared for the 2G switch-off

100% | 0% | 100%

Percentage of Responses

> "Most of our work is from an organisational and direct service user perspective, we've not done much in terms of wider engagement and campaigning about this"

> "I responded to this from a council perspective to be honest, and whilst we've done a lot of work raising awareness with a range of stakeholders, there could be more done to support local communities, especially SMEs who are hard to reach"

> "We've been doing press releases and information packs about the PSTN switch-off, but this is more from an organisational point of view and not for the general public"

The UK's telecoms infrastructure is transitioning from analogue (PSTN landlines and 2G mobile) to digital services, requiring users to adopt digital alternatives and ensure device compatibility.

This year's survey combined questions about the switch-offs, revealing that most local authorities understand and are prepared for both. Many are already implementing plans and engaging with impacted stakeholders. Key challenges remain, however, include unclear responsibilities, lack of local authority funding for this work, and stakeholder engagement.

A small minority expressed some uncertainty, particularly regarding the 2G switch-off, potentially due to less public awareness and communication compared to the PSTN switch-off.
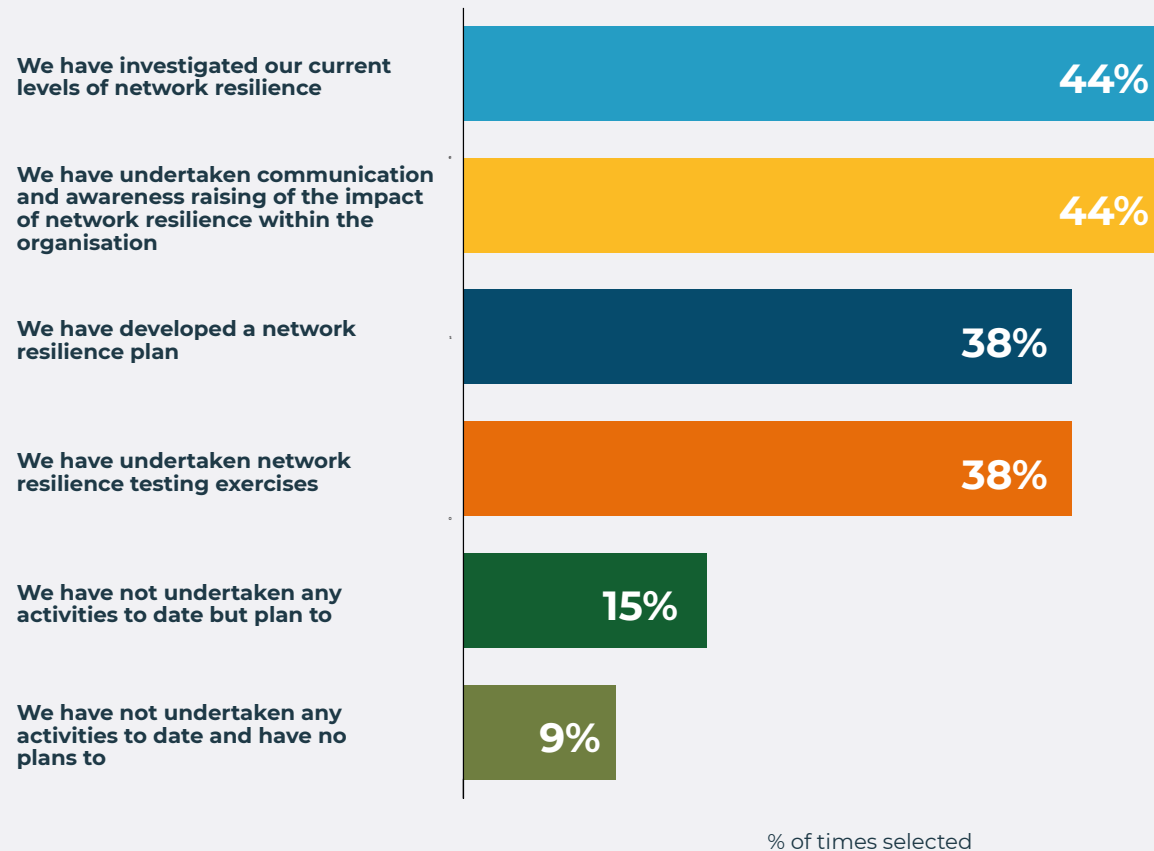
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Resilience

Resilience

Q.21 WE ASKED IF THE ORGANISATION HAD UNDERTAKEN ANY OF THE FOLLOWING ACTIVITIES TO IMPROVE NETWORK RESILIENCE.

We have investigated our current levels of network resilience — **44%**

We have undertaken communication and awareness raising of the impact of network resilience within the organisation — **44%**

We have developed a network resilience plan — **38%**

We have undertaken network resilience testing exercises — **38%**

We have not undertaken any activities to date but plan to — **15%**

We have not undertaken any activities to date and have no plans to — **9%**

% of times selected

Whilst significant investment has been made in building digital infrastructure, network resilience is increasingly crucial to ensure essential services are maintained during disruptions like outages, cyberattacks, or high demand.

A new survey question explored local authority perspectives, revealing that most had investigated their current network resilience and/or raised internal awareness of its importance. Around a third had developed resilience plans and/or conducted testing. Many authorities interpreted the question as referring to their internal networks rather than broader regional networks, a potential bias that may be reflected in their response to this survey, but also their perception of their role within the wider context.

"Our response was probably from the perspective of the council and my team; I've got no idea if the residents know to be honest"

"Most of the focus around network resilience for us is on our own internal organisation"

"At the moment fibre is our focus, but long-term rural connectivity and resilience are key goals"

"I think issues of resilience are going to become increasingly more common as more and more devices go into people's homes"

"We've not really looked at this from outside the perspective of the council, but it was something that came up within departmental conversations recently when the storm hit last year, and we lost connectivity"

"Aspects of resilience are pushed through our elected area officers – they act as a conduit between staff, citizens and councillors"

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:
- Fixed and wireless connectivity
- Economic cases and benefits analysis
- Data centres
- Smart places (IoT)
- Health & social care tech
- GiS and data analysis
- Satellite communications
- Enterprise IT and transformation

Completed **507** projects globally

4 international offices in the UK, Canada and US

Advised on **£4 billion** worth of infrastructure

100% staff think we have great company culture and would recommend working at FarrPoint

Longest client engagement **14 years** and counting

178 clients worked with internationally

We've been around for **19 years**

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