



Digital Connectivity Readiness Index

2025 Update

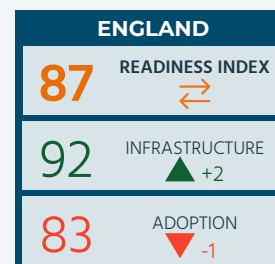
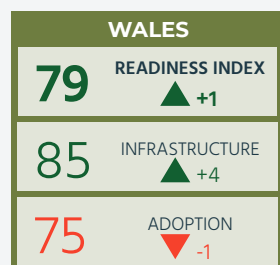
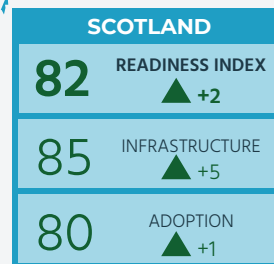
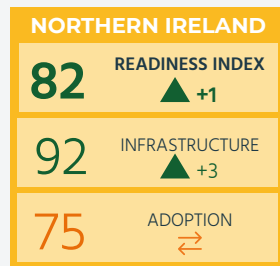
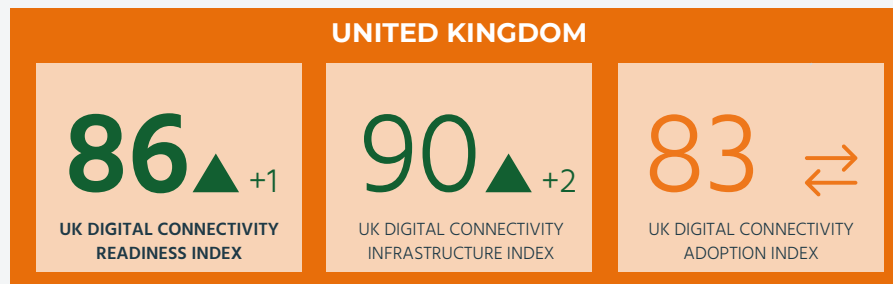


Contents

1. Executive Summary	3
2. Introduction	4
3. UK Results	6
4. England Results	7
5. Scotland Results	8
6. Wales Results	9
7. Northern Ireland Results	10
8. Special Feature: International DCRI	11
9. Next Steps	12



Executive Summary



Digital connectivity is increasingly vital for driving economic growth, supporting Net Zero progress, and improving social wellbeing. Achieving these benefits requires both robust digital infrastructure and widespread adoption of digital technologies.

FarrPoint's Digital Connectivity Readiness Index (DCRI) is designed to help decision makers understand how they perform across both digital infrastructure and adoption. This will enable them to prioritise action to maximise the benefits on offer. This report provides an update on the DCRI results for the start of 2025, giving an overview of the key findings for the UK and each of the constituent nations.

The results for 2025 show a mixed picture across the UK. Headline scores have improved for the UK overall, and for Scotland, Wales, and Northern Ireland, driven by sustained investment in infrastructure rollout. However, progress on the adoption front has been less encouraging, and the headline performance of England is unchanged from 2024.

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 has largely been driven by strong investment in Gigabit and 5G roll out; however, interestingly, the results also indicated improvement in decent fixed coverage as well as overall 4G mobile coverage across much of the UK.

On Adoption, things were less positive. Whilst Scotland's score was up over the year, indices for the UK and Northern Ireland were static, and for England and Wales their scores fell over the year. Many indicators, including skills, affordability, and innovation, either stagnated or declined. Scotland and Northern Ireland outperformed other regions, with gains in innovation, wellbeing, and digital skills, while affordability and accessible public services remained key challenges nationwide.

So, there remains significant room for progress to be made. For decision makers, undertaking an initial Digital Connectivity Readiness assessment is just the first stage to understanding the strengths and challenges within their region and 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

While digital connectivity is widely recognised as being crucial for driving economic, social, and environmental change, much of the sector's focus has been on expanding infrastructure networks. This emphasis has spurred substantial commercial and public investment to enhance infrastructure across the UK. However, network rollouts are only part of leveraging the full potential of digital. Infrastructure alone, without broad adoption, brings few tangible benefits to households, communities, or businesses.

Background to the Digital Connectivity Readiness Index

There is a growing recognition that more needs to be done to realise the true potential of digital. Most recently, the UK's Modern Industrial Strategy emphasises digital transformation as a cornerstone for economic growth and global competitiveness. It highlights the importance of robust digital infrastructure, a skilled workforce, and an enabling regulatory framework.

However, there is limited understanding behind the differences in regional performance between the availability of infrastructure and the adoption of digital technologies. This means that local and regional policymakers are not able to make evidence-based decisions on prioritising spend and instead have to 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 of the pieces of the [Connectivity Jigsaw](#), and thus to fully maximise the benefits of digital.

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

CASE STUDY

Recently we completed a **Digital Connectivity Strategic Review, utilising the DCRI Framework, for Gloucestershire County Council.**

“Conducting FarrPoint's DCRI assessment has enabled Gloucestershire to provide the County Council with a robust starting point to reflect upon where we should direct our focus within our new Digital Strategy. The assessment provides a really useful aid to start conversations with stakeholders and councillors”

- Ben Watts, Economy & Strategic Planning Team Manager

Read the full case study on our website farrpoint.com/case-studies



UK Local Authorities Connectivity Survey Results

This builds upon the results of our recently published annual [Connectivity Survey with Local Authorities](#), which provides valuable insights into the current state of digital connectivity in the UK. Some of the key findings of this year's survey reveal a continued focus on fixed and 4G connectivity, with growing awareness and recognition of 5G's importance. However, challenges persist, including access to accurate connectivity data, securing funding, and developing necessary digital skills.

As connectivity infrastructure rollout progresses, Local Authorities acknowledge the need to improve rates of take-up and adoption of connectivity solutions and digital technologies within their region. The survey highlights the need for updated digital strategies, improved data availability, and strengthened support for digital champions to effectively address these challenges and ensure a more connected

Digital Connectivity Readiness Index Methodology

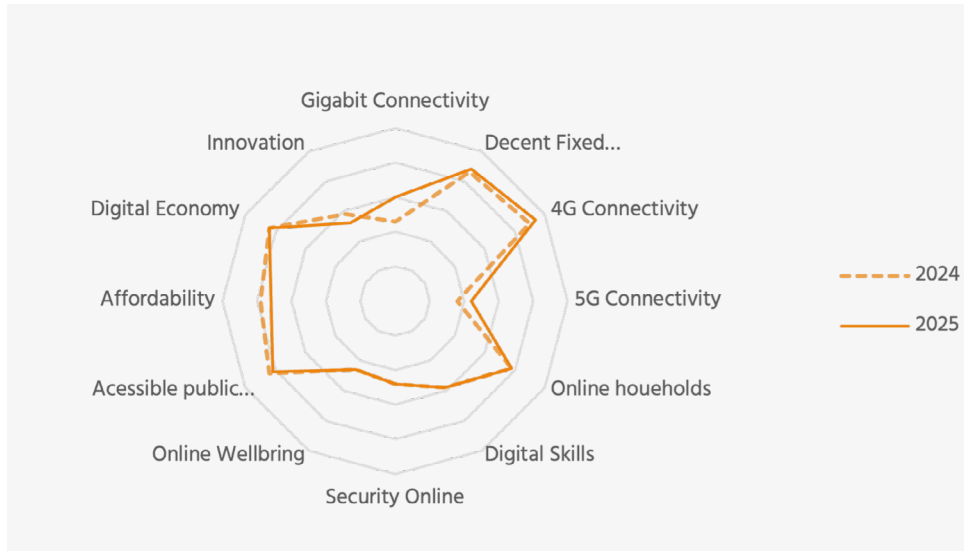
The scores contained within the DCRI are based on a range of indicators gathered from a series of data sources, including Ofcom and the Office for National Statistics (ONS). On the infrastructure side, this includes metrics on Gigabit, Superfast, 4G and 5G connectivity. Digital adoption indicators focus on understanding the performance of 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, communities and businesses alike. This report looks at some of the changes over the last year. Whilst headline figures are reported as integers, index weighting calculations are based upon unrounded numbers.

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.



UK Results



The overall UK Digital Connectivity Readiness Index was up 1-point over the year to 86 in 2025. This increase is driven by advancements in the Infrastructure Index score up to 90 from 88 a year before, whereas the Adoption Index was overall unchanged since 2024 at 83.

The increase in the headline **infrastructure** index was driven by continued strong commercial and public investment and roll out of Gigabit and 5G networks across the UK. Alongside this there were also improvements seen in wider access to basic broadband services as well as increases in 4G coverage – likely being driven at least in part by the roll out of the Shared Rural Network (SRN) programme.

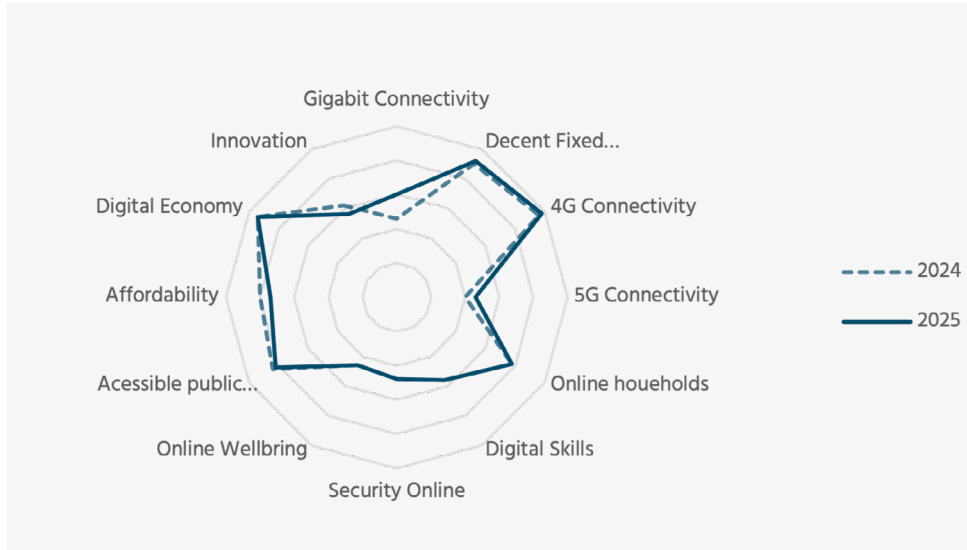
On the **adoption** side, the majority of indicators were unchanged over the year. Namely indicators on skills, security, wellbeing, the digital economy and online households were static over the since 2024.

However, several indicators acted as a drag on digital adoption:

- Accessible public services – A slowdown in government spending, likely impacted by the General Election in July 2024, had a negative impact leading to a 1-point fall over the year.
- Affordability – Slower earning and house price growth over the most recent year, meant that the number of people earning below the living wage and the number of households having to cancel digital communication services both increased over the last year. These changes meant that the affordability indicator was 3 points lower than a year before.
- Innovation – A notable fall in the number of businesses who were considered ‘innovation active’ fell from 45% the period year to 36% at the start of 2024. This meant that the innovation indicator itself fell by 3-points.

	2025	CHANGE	2024
Digital Connectivity Readiness Index	86	+1 ▲	85
Digital Connectivity Infrastructure Index	90	+2 ▲	88
Gigabit Connectivity	80	+7 ▲	73
Decent Fixed Connectivity	94	+1 ▲	93
4G Connectivity	97	+2 ▲	95
5G Connectivity	72	+4 ▲	68
Digital Connectivity Adoption Index	83	↔	83
Online Households	89	↔	89
Digital Skills	79	↔	79
Security Online	74	↔	74
Online Wellbeing	73	↔	73
Accessible Public Services	91	-1 ▼	92
Affordability	86	-3 ▼	89
Digital Economy	92	↔	92
Innovation	76	-3 ▼	79

England Results



England's overall Digital Connectivity Readiness Index score was static between 2024 and 2025 at 87. Whilst there was a 2-point uplift in the infrastructure score this was offset by a more negative picture on adoption where the adoption index actually fell by 1-point.

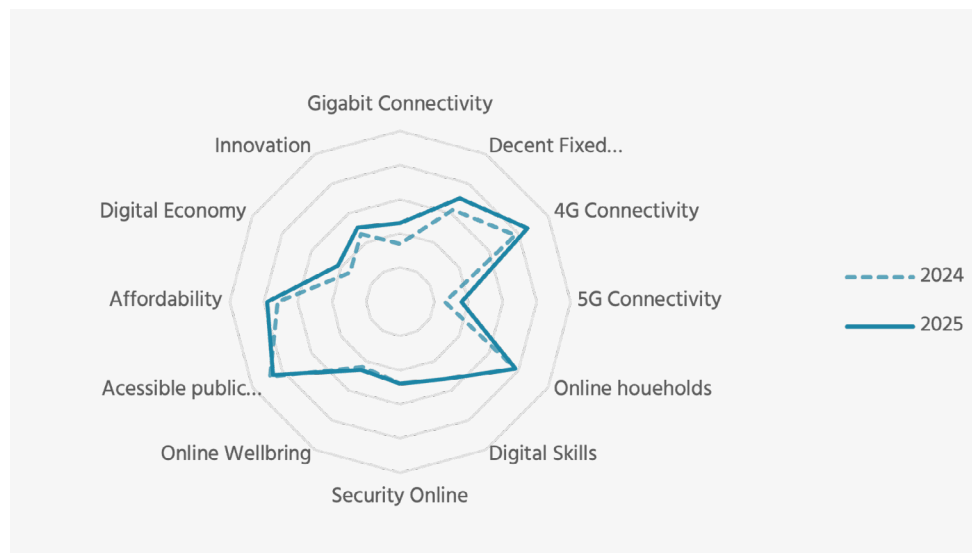
The increase in the **infrastructure** index for England was driven by continued strong investment in network rollout of Gigabit services – in particular via the UK Government's Project Gigabit programme (with the indicator up 7-points over the year). This was coupled with continued strong uplifts in nationwide 5G coverage (with the indicator up by 3-points over the year). Interestingly, there were also notable improvements in 4G coverage – likely in part driven by SRN investment – which led to that indicator increasing by 1-point over the year.

Over 2024, the **adoption** index saw a 1-point fall, driven by:

- Accessible public services – A slowdown in government spending, likely influenced by the General Election, negatively affected performance, resulting in a 1-point decline over the year and highlighting the broader economic implications of reduced fiscal activity.
- Affordability – Slower earnings and house price growth at the start of the year led to an increase in individuals earning below the living wage and more households cancelling digital communication services. These factors contributed to a 3-point decline in the affordability indicator over 2024, reflecting the growing challenges in making use of digital connectivity and technologies to maintain living standards amidst economic pressures.
- Innovation – A decreasing number of 'innovation active' businesses meaning the indicator fell 3-points between in 2024.

	2025	CHANGE	2024
Digital Connectivity Readiness Index	87	↔	87
Digital Connectivity Infrastructure Index	92	+2 ▲	90
Gigabit Connectivity	80	+7 ▲	73
Decent Fixed Connectivity	96	+1 ▲	95
4G Connectivity	99	+1 ▲	98
5G Connectivity	73	+3 ▲	70
Digital Connectivity Adoption Index	83	-1 ▼	84
Online Households	89	↔	89
Digital Skills	78	↔	78
Security Online	74	↔	74
Online Wellbeing	73	↔	73
Accessible Public Services	91	-1 ▼	92
Affordability	87	-3 ▼	90
Digital Economy	97	↔	97
Innovation	78	-3 ▼	81

Scotland Results



Unlike most of the UK, Scotland performed well over the last year, seeing improvements in both infrastructure availability (up 5-points over the year and the largest increase across the UK) and digital adoption (up 1-point over the year). This gave Scotland an overall DCRI score which increased by 2-points in 2024.

Scotland saw strong improvements across all the **infrastructure** index indicators in 2024. Continued investment in programmes such as R100, alongside private sector investment led to increases in Gigabit and decent fixed connectivity coverage across the country. In addition, SRN and wider private investment in mobile infrastructure led to uplifts in both 4G and 5G indicators over the year.

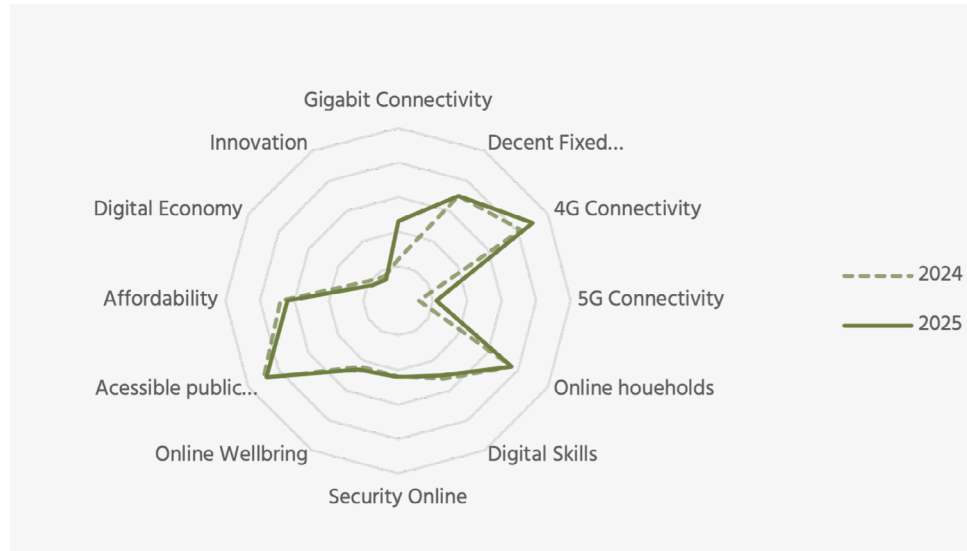
On **adoption**, unlike in other areas of the UK, progress is being made in some areas, including:

- Online wellbeing – Improvements were seen in both people being comfortable with the amount of time spent online as well as younger people being exposed to worrying material online.
- Affordability – Increases seen in earnings over the last year as well as slower rising in housing costs, have contributed to Scotland having the lowest proportion of households having to reduce spend on digital services across the whole of the UK.
- Digital economy – Growth in sectors such as FinTech, Health Tech, and Gaming in Scotland has grown the size of the digital economy (up 4%) in Scotland as well as the number of people employed in the sector (up 10%) over the year.
- Innovation – Whilst most of the rest of the UK saw a fall in innovation at the start of 2024, in Scotland there was an uplift in the number of firms being considered 'innovation active'.

However, as across the rest of the UK, a challenging fiscal climate has led to a slight fall in the accessible public services metrics. Key indicators related to online households, digital skills and online security remained stable over 2024.

	2025	CHANGE	2024
Digital Connectivity Readiness Index	82	+2 ▲	80
Digital Connectivity Infrastructure Index	85	+5 ▲	80
Gigabit Connectivity	73	+6 ▲	67
Decent Fixed Connectivity	85	+4 ▲	81
4G Connectivity	93	+4 ▲	89
5G Connectivity	68	+5 ▲	63
Digital Connectivity Adoption Index	80	+1 ▲	79
Online Households	89	↔	89
Digital Skills	76	↔	76
Security Online	74	↔	74
Online Wellbeing	73	+1 ▲	72
Accessible Public Services	93	-1 ▼	94
Affordability	89	+3 ▲	86
Digital Economy	71	+4 ▲	67
Innovation	75	+1 ▲	73

Wales Results



Wales' story on Digital Connectivity Readiness was mixed over 2024. Whilst its overall DCRI Index score showed a marginal improvement, up 1-point to 79, this was driven by the nationwide improvements in Gigabit and mobile networks. On adoption, the picture was worse with the overall adoption indicator falling over 2024.

The Welsh **infrastructure** index saw the second largest increase in the UK over the period, up 4-points. This increase was largely driven by improvements in Gigabit coverage (indicator up 11-points over 2024 – the largest increase in the UK). Also, Wales saw significant progress in 5G rollout, importantly this was also backed up by improvements to 4G coverage, driven in part by SRN investment in rural areas.

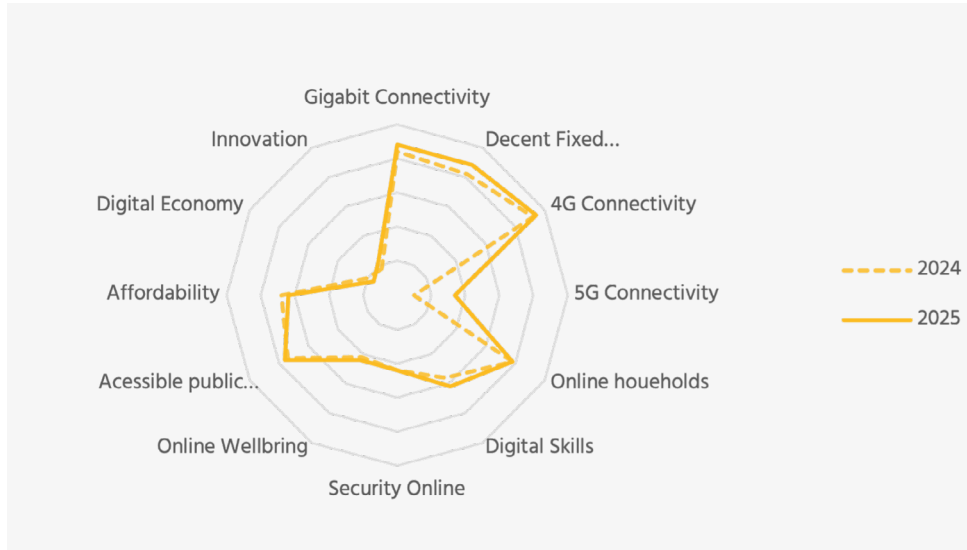
On **adoption**, the picture was less good. Five indicators were down over the year, with improvement only seen in one, meaning overall the adoption index score decreased by 1-point over the year.

- Digital skills – Falls in the number of people with basic digital skills remains a key barrier to digital adoption in Wales.
- Accessible public services – Reduced government spending, likely tied to the General Election, caused a 1-point annual decline, underscoring the wider impact of constrained fiscal policies.
- Affordability – The affordability indicator fell in Wales, in particular in the second half of the year due to increased digital media subscription cancellations, alongside more people earning below the Living Wage.
- Digital economy – A fall in the number of people working in digital in Wales meant that this indicator fell by 2-points.
- Innovation - Falling business innovation led to a 1-point decline in the indicator over 2024.

Encouragingly there was a slight uptick in online wellbeing, whilst indicators for online households and security online were stagnant over 2024.

	2025	CHANGE	2024
Digital Connectivity Readiness Index	79	+1 ▲	78
Digital Connectivity Infrastructure Index	85	+4 ▲	81
Gigabit Connectivity	73	+11 ▲	62
Decent Fixed Connectivity	85	↔	85
4G Connectivity	95	+4 ▲	91
5G Connectivity	61	+5 ▲	56
Digital Connectivity Adoption Index	75	-1 ▼	76
Online Households	88	↔	88
Digital Skills	75	-1 ▼	76
Security Online	72	↔	72
Online Wellbeing	73	+1 ▲	72
Accessible Public Services	94	-1 ▼	95
Affordability	82	-2 ▼	84
Digital Economy	59	-2 ▼	61
Innovation	57	-1 ▼	58

Northern Ireland Results



	2025	CHANGE	2024
Digital Connectivity Readiness Index	82	+1 ▲	81
Digital Connectivity Infrastructure Index	92	+3 ▲	89
Gigabit Connectivity	94	+2 ▲	92
Decent Fixed Connectivity	94	+3 ▲	91
4G Connectivity	97	+1 ▲	96
5G Connectivity	67	+12 ▲	55
Digital Connectivity Adoption Index	75	↔	75
Online Households	89	↔	89
Digital Skills	81	+3 ▲	78
Security Online	72	↔	72
Online Wellbeing	72	+1 ▲	71
Accessible Public Services	88	+1 ▲	87
Affordability	82	-2 ▼	84
Digital Economy	58	-2 ▼	60
Innovation	61	+1 ▲	59

For Northern Ireland, the story for Digital Connectivity Readiness Index has been an optimistic one in 2024 with increases across all infrastructure indicators as well as a number of adoption indicators. The overall Readiness score was up 1-point to 82 over the year, with the infrastructure index up 3-points with headline adoption static in 2024.

Northern Ireland continued to perform strongly on the **infrastructure** index, with an increase in 5G coverage in the latter half of the year, increasing the indicator by 11-points in the second half of 2024 (largest increase in the whole of the UK). There were also notable rises in Gigabit and decent fixed connectivity over the year, with continued strong public and private investment seen across the country. Finally access to 4G connectivity also improved slightly across the year.

Whilst the **adoption** index score remained significantly behind its infrastructure counterpart (with the gap growing to 17-points, the widest in the UK), there were some improvements seen across some of the key indicators:

- Digital skills – there were improvements in metrics on individuals with general foundational digital skills (the highest in the UK) and increases in online education.
- Online wellbeing – this was driven by a greater number of people being comfortable with the amount of time spent online.
- Accessible public services – the improving stability in Northern Ireland politics has likely in part driven the slight increase in the accessible public services indicator.
- Innovation – over 2024, increases in R&D spend helped to boost the indicator.

In terms of affordability, as in other areas of the UK, slow earning growth has led to a greater number of people cancelling their digital service subscriptions. Fewer people working in the tech sector in Northern Ireland over the year led to a 2-point fall in the country's digital economy indicator.

Indicators for online households and security online were unchanged over 2024.

Special Feature: International DCRI

Digital Connectivity plays an important role in international competitiveness in terms of increasing economic growth as well as attracting workers through social benefits and enabling a transition to Net Zero. Therefore, in September 2024, we produced an International Digital Connectivity Readiness Index to baseline performance on both Digital Infrastructure and technology adoption across the G7.

Despite the G7 countries all being high-income advanced nations, the results of the Digital Connectivity Readiness show significant differences in infrastructure and adoption performance. Given the importance of digital connectivity, policymakers should understand the individual challenges and opportunities available to them, which this framework provides.

Overall DCRI		Infrastructure Index		Adoption Index	
1 st	United Kingdom	1 st	Japan	1 st	United Kingdom
2 nd	Germany	2 nd	Canada	2 nd	Germany
	United States	3 rd	France	3 rd	United States
4 th	Canada	4 th	Germany	4 th	Canada
	France	6 th	United Kingdom	6 th	France
7 th	Japan	7 th	United States	7 th	Japan
	Italy		Italy		Italy

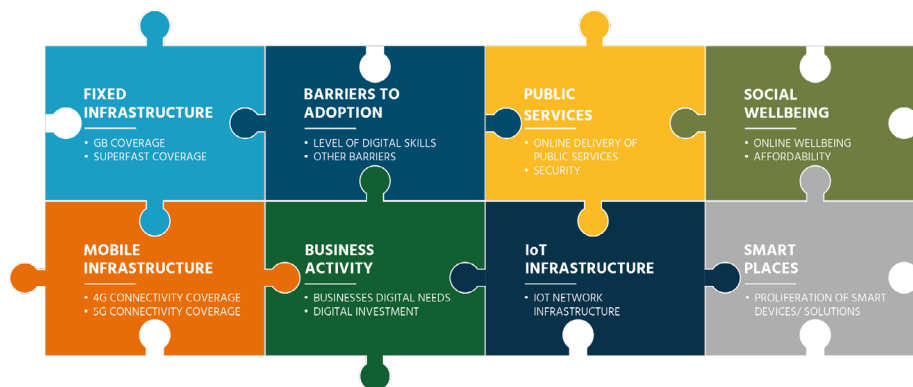
- The **United Kingdom** leads the G7 in terms of overall Digital Connectivity Readiness. It ranks in the middle for digital infrastructure, with strong fixed and 4G coverage, and notable progress in 5G and Gigabit coverage. On adoption, it excels in digital economy, online households and digital skills, however, needs to address wellbeing, security and innovation challenges.
- **Germany** is ranked joint 2nd on its overall score. It ranks 4th for infrastructure with strong 4G coverage and 5G investment, but slower Gigabit network rollout could hinder future progress. While it leads in digital skills and affordability, it faces challenges with stagnating innovation and a slight decline in the digital economy.
- Overall, the **United States** ranks joint 2nd overall. However, it is placed 6th for infrastructure, despite leading on mobile connectivity, it struggles on fixed coverage. On adoption, it ranks 3rd, excelling in the digital economy, innovation and public services but faces digital skills, security, and affordability challenges.
- **Canada** is joint 4th overall, with strengths in widespread access and adoption of household broadband and mobile coverage. However, remote areas still face ongoing challenges, and Canada lags in digital economy and innovation.
- **France's** headline score is joint 4th, with the infrastructure score improving its overall performance, primarily driven by increases in 4G connectivity, with a strong showing on Gigabit connectivity. Despite progress in public services and household online adoption, challenges remain in innovation and affordability.
- **Japan** ranks joint 4th in the overall score. It is a two-sided story as it currently leads the G7 on infrastructure, excelling in 5G and Gigabit network deployment and robust broadband and 4G coverage. However, it only ranks 6th on adoption due to affordability issues, a lack of digital skills, and concerns about online wellbeing, which hinder the widespread use of its advanced infrastructure.
- **Italy** is ranked last in infrastructure, adoption, and in overall score. This is largely driven by poor mobile connectivity, including slow 5G rollout, and lagging future-proofed network deployment. Additionally, Italy underperforms in digital skills, the digital economy, and household adoption, further hindering its ability to foster a secure, inclusive, and competitive digital environment.

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.

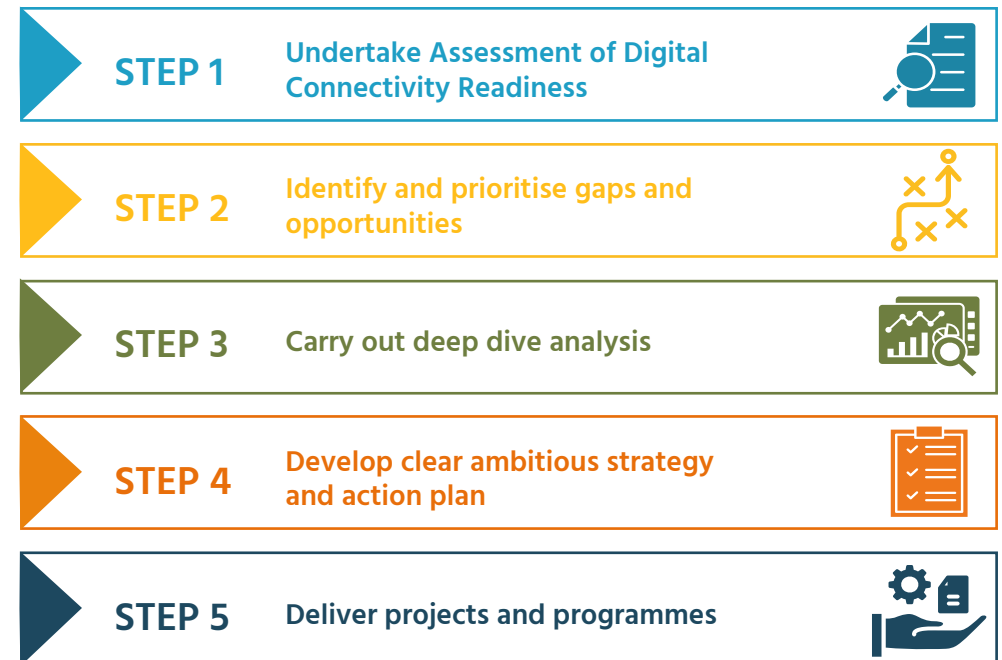
However, infrastructure on its own does not deliver the benefits to wider households and businesses.

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
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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



<p>Completed 507 projects globally</p>	<p>4 international offices in the UK, Canada and US</p>		<p>Advised on £4 billion worth of infrastructure</p>
<p>100% staff think we have great company culture and would recommend working at FarrPoint</p>	<p>Longest client engagement 14 years and counting</p>		<p>178 clients worked with internationally</p>
	<p>We've been around for 19 years</p>		

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