Connecting today for tomorrow

On the right track

2026/2027

CLUTTONS

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"This government has made growth a priority. As Minister for Digital Economy, I am clear: if we want a more prosperous, innovative and inclusive UK, world class connectivity is not optional, it is essential."

"Mobile connectivity sits at the heart of this mission. Fast, reliable and secure mobile networks will support everything from remote healthcare to cutting-edge manufacturing, from smart cities to the everyday services that we all now rely on. That is why we are setting out a framework so that everyone in the UK can benefit from high-quality mobile connectivity, delivered by the latest technology – standalone 5G by 2030."

Baroness Lloyd of Effra CBE
Minister for Digital Economy Parliamentary Under-Secretary of State in the Department for Science, Innovation and Technology February 2026

Survey data based on YOUGOV poll of 108 MPs carried out between 1-28 April 2025, survey weighted to reflect seat counts in Parliament.

Introduction

The UK's reliance on digital connectivity, whether via gigabit-capable broadband, or 4G or 5G, continues to grow. Our use of mobile data jumped by nearly 20% last year. Being connected is now essential – for life and for business. It is also essential for the economy. Accelerating the rollout of high-capacity resilient mobile networks could deliver an extra £230 billion in economic benefits by 2035.

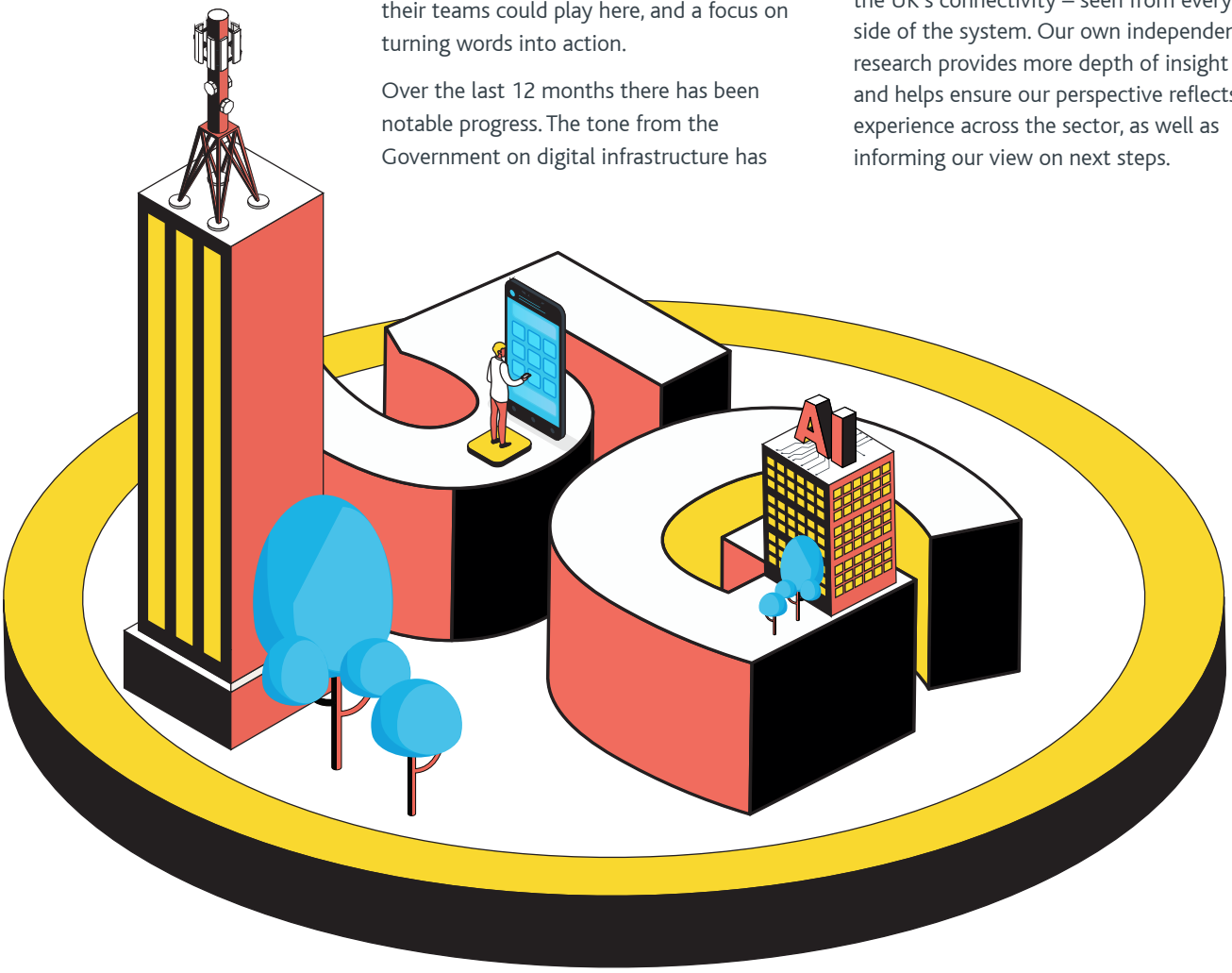
Ensuring the roll-out of the infrastructure needed to deliver best-in-class connectivity to the country is crucial, and the Government has set ambitious targets around this, especially when it comes to mobile. In our annual report last year, we asked: 'Are we nearly there yet?' and found that while there was good progress on ensuring 99% gigabit availability for all homes by 2032, there was some way to go to meet the goal of 100% standalone 5G across populated areas.

We called for an information campaign to close the 'understanding gap' between people who want good connectivity, but don't support the infrastructure needed to provide it, funding for Digital Placemakers across the country – highlighting the role Mayors and their teams could play here, and a focus on turning words into action.

Over the last 12 months there has been notable progress. The tone from the Government on digital infrastructure has turned, and it is now being much more explicit about the need for masts and cables to underpin the connectivity the country needs now and in the future especially with the focus on AI and the opportunities it will bring.

But there is still some way to go. This report examines progress to date, and highlights what needs to happen next, by investigating the state of UK digital connectivity from every angle: political, consumer, industry, academic and economic.

We work closely with operators, landlords and the public sector, and as such, Cluttons is well-positioned to put a spotlight on the barriers facing those tasked with delivering the UK's connectivity – seen from every side of the system. Our own independent research provides more depth of insight and helps ensure our perspective reflects experience across the sector, as well as informing our view on next steps.



Executive summary

The change in the Government's tone around digital connectivity was clear in last year's Infrastructure Strategy. Whereas two years ago any mention of digital was limited to data centres, this document included specific wording recognising how important the masts and cables that enable connectivity are. It said: "Digital Infrastructure …increasingly underpins the provision of services critical for the functioning of society, business and Government."

The increased focus on AI, and the applications of AI which promise to benefit the economy, has also directed attention on the means by which it can be delivered to businesses and consumers. AI is evolving at real pace, and this is likely to have spurred faster action from the Government as it seeks to secure international investment, especially for data centres. We examine the trends in AI in more detail on page 19.

But are words being turned into action? This is something we called for in last year's report, and while there is evidence of progress, there is still more to be done. The roll-out of gigabit broadband and standalone 5G has moved forward since last year, although **there are still questions around whether the Government's target 2030 target for standalone 5G (5GSA) will be met.** We look at this on page 8.

However, there is also a need for the delivery of connectivity that serves needs, even if that is in areas with higher demand. This means moving away from just 'coverage' to examining capacity as and when it is needed. This is a theme echoed by Professor Nigel Linge on page 30, who says there should **be a focus on the ubiquity of connectivity.**

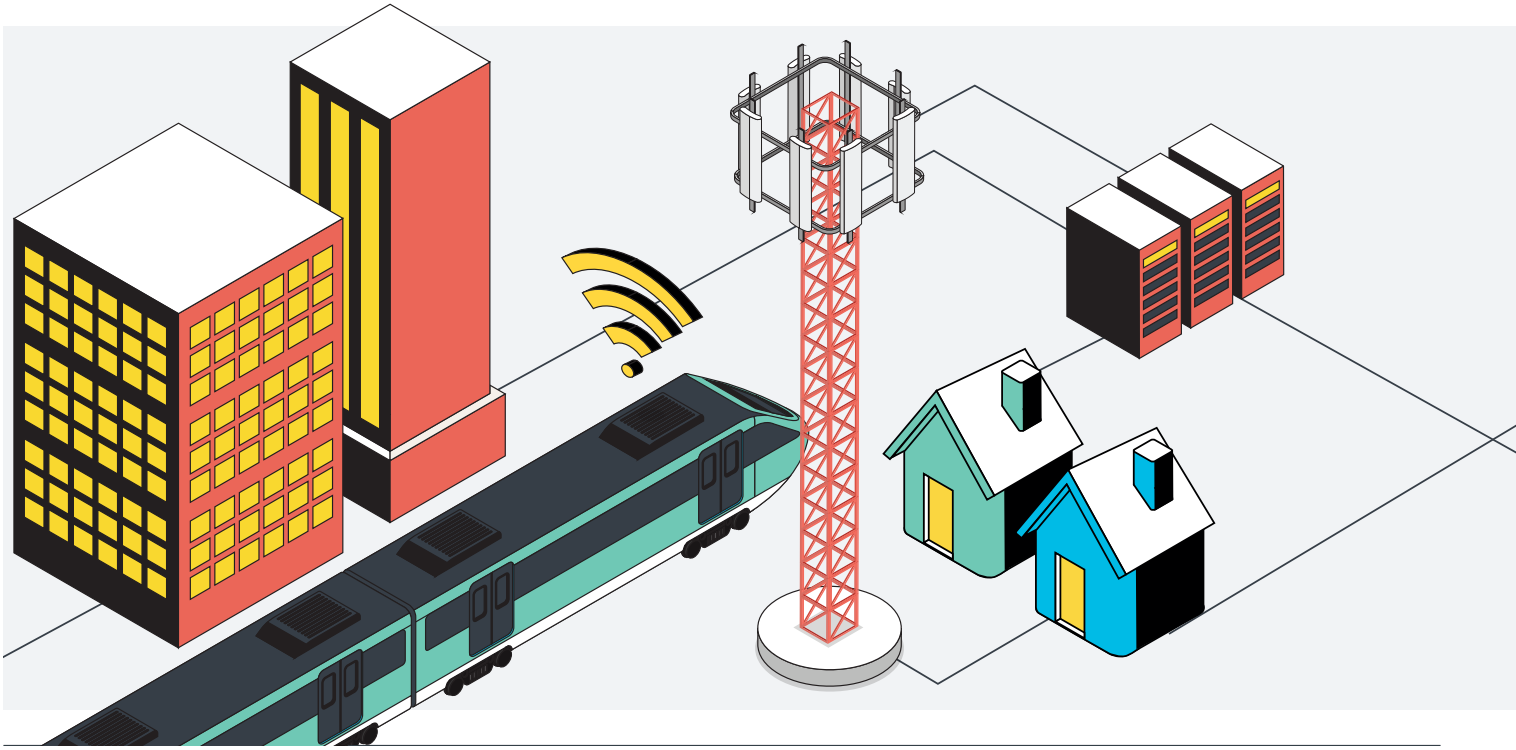
The scale of the task to achieve this, especially for mobile, is highlighted by the data shared with us by Ookla on speeds across the country, discussed on page 9, which show the staggering difference in average download speeds across the country, and the large range in latency.

Easing the path for the roll-out of mobile infrastructure to meet Government targets will also take more than policy wording. **These words need to be turned into action.** Sean McHenry, managing director of Causeway Telecoms Planning, outlines the changes outlined in the NPPF consultation on permitted development rights. Some of these changes will be positive if introduced, but there is room to go further.

To underline the need for more movement, the Digital Communities All Party Parliamentary Group (APPG) earlier this year called for an urgent, independent, review of the UK's digital connectivity landscape, stronger regulatory scrutiny by Ofcom and more strategic investment in connectivity as a driver of economic growth. APPG chairman Helen Morgan shares her views on page 12.

We call for the Government ensure policy wording is turned into action quickly, to address the hurdles currently slowing down the delivery of connectivity, especially in and around planning.

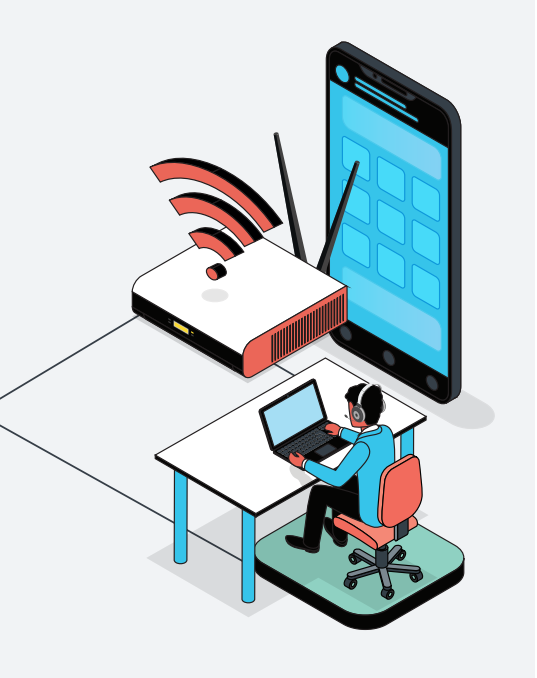
The challenges in rolling out digital infrastructure can also be addressed by good communication and understanding between stakeholders. Last year, we highlighted the role we felt Mayors and



Mayoral Authorities could play in helping strategic planning and delivering outcomes at a regional and local level.

We have gone further this year, speaking to 13 of the 14 Mayoral Combined Authorities (MCAs) in England to get a more detailed insight into how they are approaching digital connectivity in their regions. Most MCAs now have a strategic role or team responsible for digital connectivity, acting as a convener for internal and external stakeholders, and positioning digital connectivity at the forefront of conversations about placemaking, with tangible outcomes. As we highlight on page 22, it's notable that those Mayoral Authorities which have been established the longest are further along this journey, with many now focusing on capacity rather than just coverage. As devolution continues in England, there is a model here where newly formed MCAs could follow the template of the more established MCAs in setting up a digital placemaker or placemaking team to ensure their region gets up to speed quickly and effectively.

Another key ask in our report last year was an information campaign to help close the gap in understanding between the need for digital infrastructure and the connectivity that everyone wants. This year we wanted to investigate consumer attitudes to connectivity in more detail, and so we commissioned a wide-ranging survey from YouGov. The results revealed some positive trends, as shown on page 13, with a material proportion of respondents recognising the benefits of digital connectivity, and the infrastructure needed to provide it.



But there is much more to do.

The survey also shows a significant minority of respondents would oppose the roll-out of digital infrastructure in their locality, despite the survey showing that consumers recognise the importance of connectivity, and reporting that they experience connectivity challenges.

We also commissioned an updated survey of more than 100 MPs from YouGov, which shows that one in five MPs report being contacted by constituents about slow or variable broadband speeds once a week or more.

Information is still needed to bridge the gap between the need and benefits of good connectivity and the infrastructure needed to provide it, and we believe this should be in the form of a Government-backed campaign.

One factor that crops up time and again is the issue of connectivity on the UK's train lines. As we flagged in last year's report, the time spent commuting when a lack of reliable signal impedes working, is a drag on productivity. This year, we worked with Assembly Research to understand what the benefits would be of improving connectivity. The data shows that better rail coverage could add more than 66 million hours of passenger productivity by 2035. Improving the coverage along railways to 80% could result in nearly £3 billion in productivity over the next decade as outlined on page 18. **We are calling for a renewed focus on connectivity on trains, to improve productivity but also to improve travellers' experience.**

CLUTTONS ASKS

Digital connectivity and infrastructure is now largely recognised as critical national infrastructure, underpinning the UK's economic and societal functions, as well as enabling economic growth, public services, cyber resilience and the UK's ability to capitalise on AI. However, some aspects of the delivery of infrastructure does not benefit from the same CNI rules as other infrastructure, meaning that progress is slower.

We are calling for policy to translate into practical action. Planning reform and permitted development changes are clear steps forward, but further intervention is needed to accelerate infrastructure rollout. This includes clearer national direction, stronger regulatory support, and more strategic investment to unlock delivery at pace.

We are also highlighting the need to move beyond headline coverage targets and focus on capacity, quality, and reliability to deliver truly ubiquitous coverage across the UK . Connectivity must work where and when it is needed, especially as demand rises. Persistent regional disparities in speed and performance demonstrate that this shift is essential.

We also see a clear role for better communication – bridging the gap between public demand for connectivity and acceptance of the infrastructure required to deliver it.

Momentum is building, but we need faster, more coordinated action to ensure high-quality, reliable connectivity for everyone.

The global view

The average mobile data download speed in the UK accelerated last year, with Ookla recording an average speed of 68.46 Mbps, compared to 56.34 Mbps in 2024.

Even so, the UK still slipped down the global rankings of mobile download speeds to 59th place, compared to 53rd place in 2024 and 51st in 2023. The UAE, Qatar and Kuwait top the charts with speeds of more than 400 Mbps. This signals that while performance is improving in the UK, the pace of that improvement is not keeping up with global competitors.

There is a similar trend for broadband – while fixed-line average download speeds climbed from 117.49 to 147.35 Mbps, the UK only remained ranked 44th in the world, behind Singapore, Chile and Hong Kong in the top positions, with speeds of more than 335 Mbps.

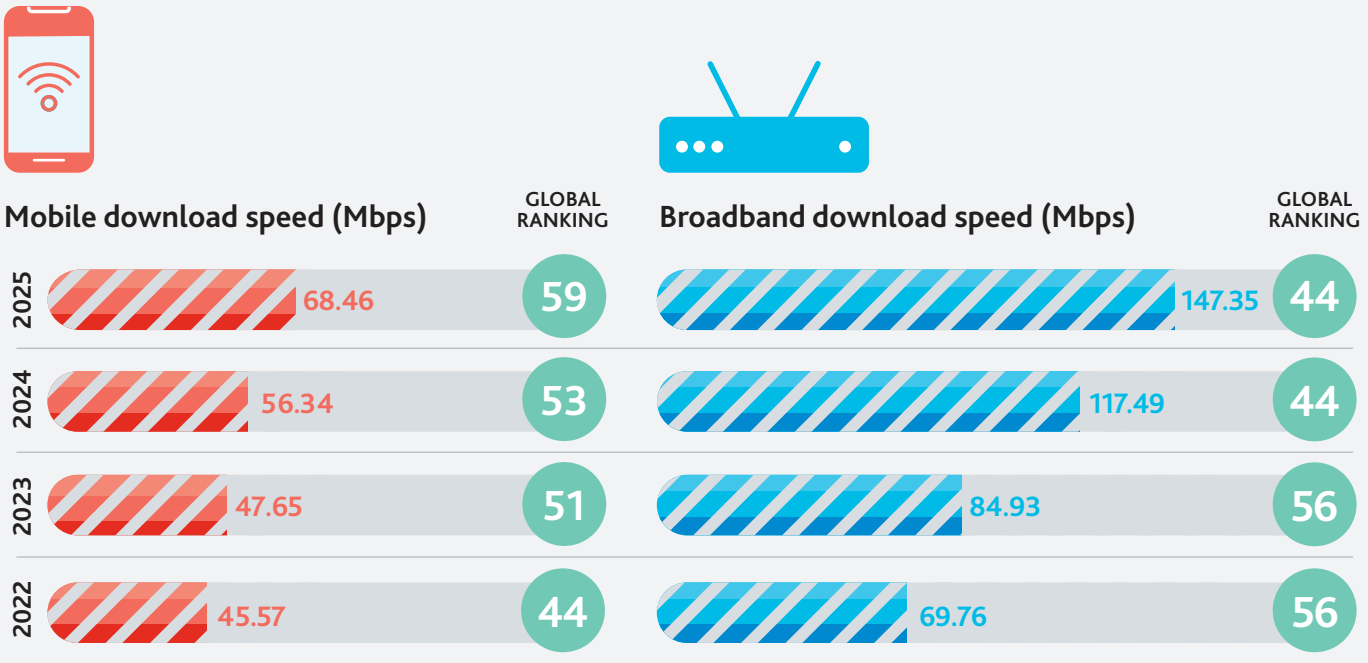
The UK's position in a global context matters, as our levels of connectivity are pertinent information for investment decisions, especially in the fast-growing data centre sector.

Ofcom has also started to monitor one aspect of the international landscape, looking more at coverage rather than speed. Even on this metric, when compared against some key global competitors, it highlights that the UK still has some way to go. The UK had gigabit-capable broadband available in 86% of premises in Q1 2025, compared to 100% or full residential coverage available in Singapore, Japan and Spain, and 96% in France.

59th

The UK still slipped down the global rankings of mobile download speeds to 59th place, compared to 53rd place in 2024 and 51st in 2023.

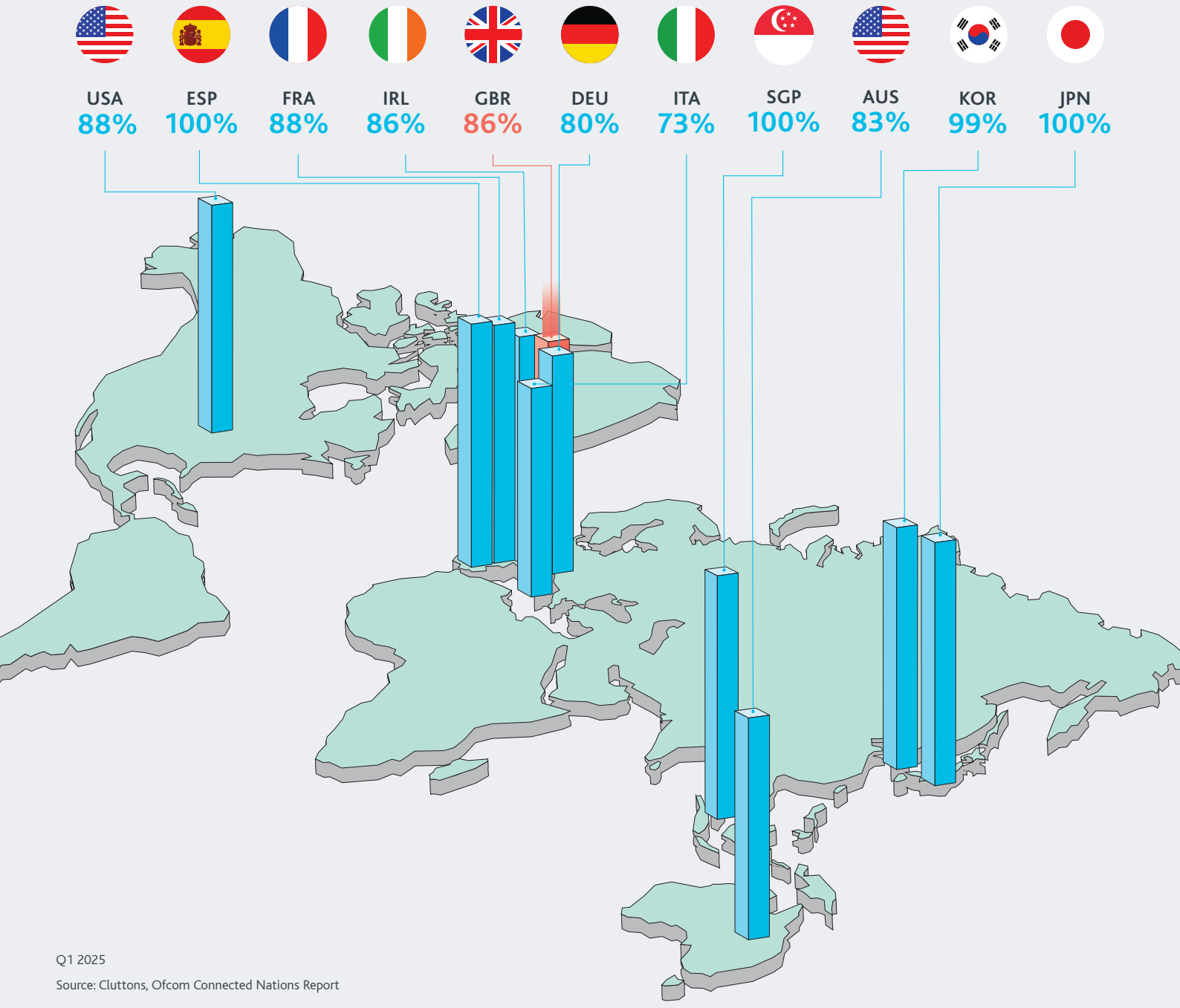
Speeds improving, but UK still falling behind vs international competitors



Cluttons, ISPreview, Ookla

Full-fibre and gigabit-capable fixed broadband network coverage:

% of premises



Q1 2025

Source: Cluttons, Ofcom Connected Nations Report

The national view

When it comes to meeting our own targets for digital connectivity, there has been significant progress since our last report. For gigabit-capable broadband, the current target is that all residential premises in the UK should have access by 2032.

There has been good progress towards this goal, with coverage at 87% last year and it is widely anticipated that this 99% goal will be met in the next four years.

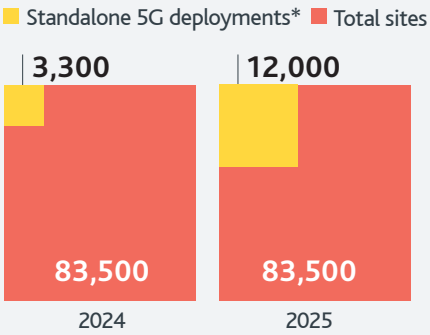
For mobile connectivity, the target is that standalone 5G (sometimes referred to as 5G SA or 5G+) should be available in all populated areas by 2030.

Two Mobile Network Operators (MNOs) have also made pledges around 5G SA, with EE (BT) saying their latest 5G SA network will reach 99% of population coverage by 2030. VodafoneThree has pledged to reach more than 99% of the population with their 5G SA network by 2030 and 'every corner of the UK' by 2034. VM02 has launched "02 satellite", using Starlink satellites to provide mobile data services in rural "not-spots".

There has certainly been strong progress over the last year when it comes to 5G SA, with the number of sites where SA is deployed more than tripling, rising from 3,300 sites to 12,000, according to Ofcom's data. In this instance, each site is a 'deployment of 5G SA' and there might be more than one deployment by different MNOs on the same

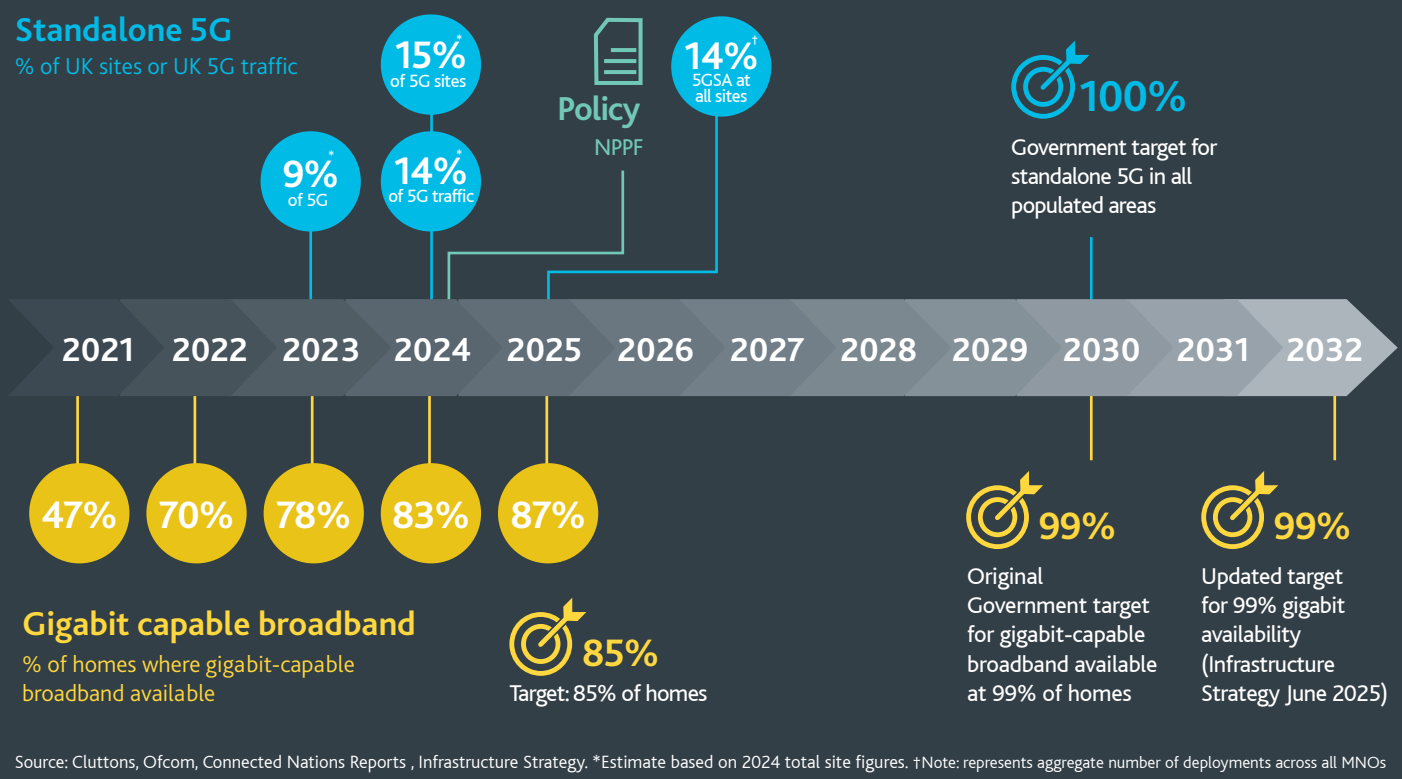
Increasing Standalone 5G

Standalone 5G deployment has jumped by more than 250%



*May be more than one deployment at one site, graphic illustrative only. Source: Ofcom Connected Nations Report

Timeline of gigabit broadband and standalone 5G in the UK vs targets



Source: Cluttons, Ofcom, Connected Nations Reports , Infrastructure Strategy. *Estimate based on 2024 total site figures. †Note: represents aggregate number of deployments across all MNOs

"The increased use of 5G SA means higher speeds and capacity, and lower latency, underpinning the best-in-class digital connectivity that will benefit the UK."

physical infrastructure. Looking at these numbers as a proportion of the total 83,500 sites may not give exactly the correct picture, but the strong rise in deployments is clear. There is further to go, and this process will be further supported as some of the hurdles to the roll-out of infrastructure we examine later in the report are addressed.

The increased use of 5G SA means higher speeds and capacity, and lower latency, underpinning the best-in-class digital connectivity that will benefit the UK. But the frequencies used for 5G SA have shorter range, so to deliver this level of connectivity right to consumers mean a larger network of masts at a local level. While the deployment of 5G SA is an imperative foundation, the supporting network must also be in place.

The key argument for augmenting digital connectivity is that our appetite for data continues to rise. The rising use of data-intensive content, from videos to AI, as well as the increasing digitisation of services and a growing reliance on Fixed Wireless Access networks has pushed the average monthly mobile traffic in the UK to 1,257 petabytes last year, an 18% rise compared to 2024. This translates into 15 trillion megabytes during 2025 alone. If you consider that one megabyte would allow you to download four books, this equates to around 4 million British Libraries. All data requirements across broadband and mobile are set to continue rising, as data-hungry AI applications demand a high volume of high-quality data. AI-driven data traffic could contribute an additional 20-80% on top of 2024 levels, depending on how widely AI applications are adopted, according to research from GSMA Industry Services, the global mobile consultancy.

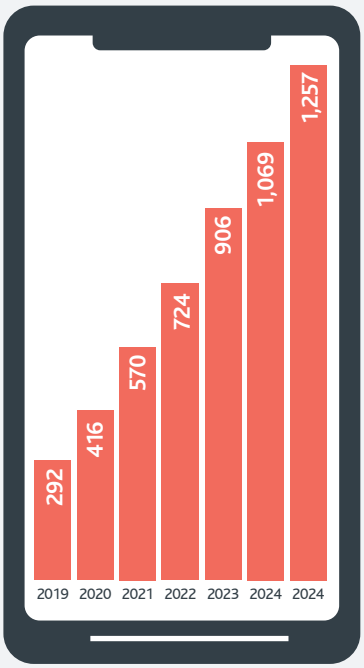
A consideration that emerges from our interviews with Mayoral Combined Authorities (MCAs) featured on pages 23 to 29 is that there is now an increasing focus not just on coverage when it comes to mobile connectivity, but also capacity to provide reliable services even in locations or at times where demand is intense. This presents different levels of challenge around the country, as the average user experience is localised.

Data shared with Cluttons from Ookla shows that Nottingham, Liverpool, Glasgow and Manchester have the highest average mobile download speeds across the UK's key cities ranging from 96.2 Mbps to 103.3 Mbps. At the other end of the scale, Brighton and Bristol have the slowest speeds, with 63.2 Mpbs and 67.4 Mbps respectively. Even within these cities, the speeds and reliability will differ street by street. This is why several Authorities including the GLA, GMCA and South Yorkshire, are now MCAs investing in their own data to map coverage and capacity. Ofcom also now offers 'Map your Mobile' which allows all users to check coverage by operator, both outdoor and within buildings. Providing coverage details for each operator also reveals the level of choice for consumers, and is another consideration for some MCAs – ensuring there is good competition in the market in most locations.

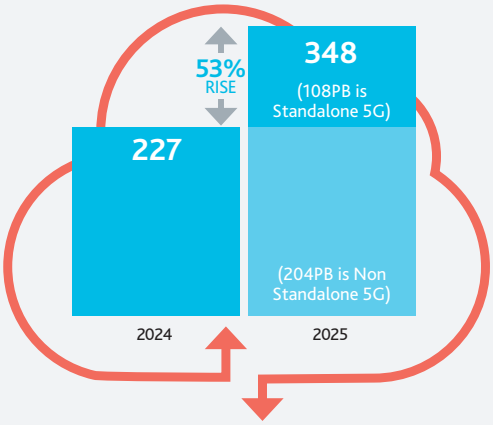
The scale of the challenge in offering the same connectivity experience across the board is clear from Ookla's latest regional data. The range of average data download speeds runs from a very low 22.8 Mpbs in Fermanagh and Omagh in Northern Ireland, to Derby which tops the charts at 114.5 Mpbs. When it comes to latency, Greater London has the lowest latency, while most of the regions in Northern Ireland have the highest readings, signalling a less reliable service.

Rising appetite for data

All UK mobile monthly traffic, Petabytes (PB)



5G UK monthly mobile traffic (PB)



15.08 trn megabytes annual mobile data usage*

Source: Cluttons, Ofcom Connected Nations Reports

*Estimated based on monthly data use

The policy view

In Summer 2025, policymakers were explicit about the value of digital connectivity to the economy, and government, and society – one of the first times the Government acknowledged the importance of connectivity in such a way. This was a positive step.

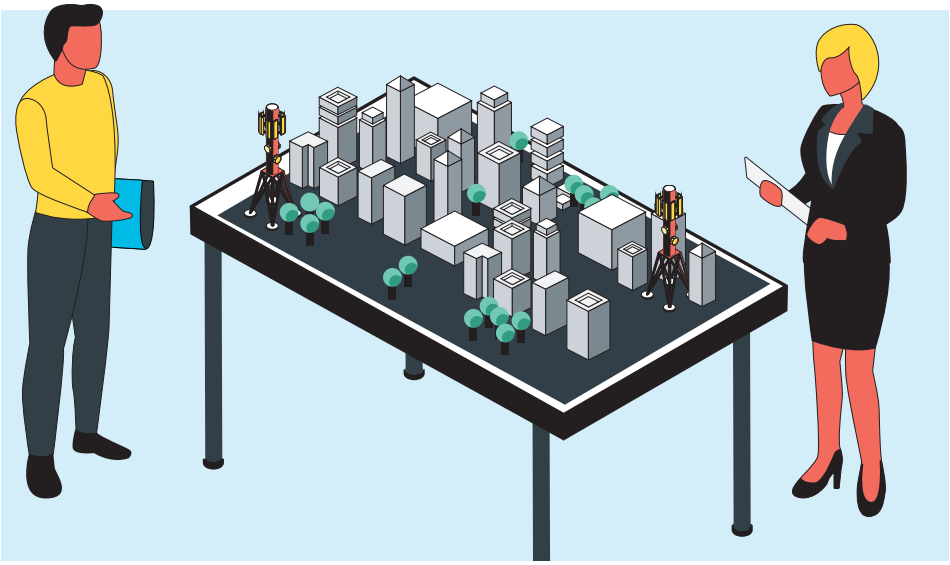
However, policy change and action need to follow to show there is some meaning behind these words – hence our call last year for 'turning words into action'.

There has been progress in the last 12 months. A consultation on permitted development rights for mobile infrastructure was a step forward. This consultation includes some positive proposals around the implementation of changes to infrastructure that will be essential for the provision of 5G SA services, as Sean McHenry, managing director at Causeway Telecoms Planning, examines on the next page. Yet there is also room for improvement, as he explains.

The new National Planning Policy Framework (NPPF) is a bold redirection for housing, with the introduction of 'Grey Belt' land and a presumption in favour of development. However, when it comes to digital connectivity, there is an argument that the NPPF could go further. In a joint response to the draft legislation, Mobile UK and the Mobile Infrastructure Forum (MIF) called for 'the restoration of explicit language that recognises high-quality digital infrastructure as "essential for economic growth and social well-being", ensuring it remains a central pillar of national policy'.

Words are key here. The language used throughout the framework impacts local decisions. Not only could the content be strengthened, highlighting how digital infrastructure underpins other outcomes for individuals and businesses, be that transport, economic growth or carbon reduction, but stronger wording around the importance of this infrastructure would also have import. As Mr McHenry says: "Simply put, the NPPF does not go far enough in terms of strong language that allows decision makers to apply appropriate weight on the material socio-economic benefits of connectivity infrastructure in cases of policy conflict."

There is a demand and need to provide top quality digital connectivity everywhere across the country, rural or urban, unlike housing or roads without the weight of language in NPPF, there may be decisions that undermine infrastructure by focusing on other considerations.



> "The definition of 'good' mobile coverage should be kept under review to ensure it is in line with users mobile service expectations."
>
> Mobile Market Review, Call For Evidence, February 2026

"The NPF4 in Scotland has a useful 'Policy Intents' and 'Key Policy Connections' section which assists with this – perhaps the NPPF could look at something similar", Mr McHenry adds.

Given that the NPPF is heavily focused on housing, it has also surprised some that the provision of digital connectivity has not been designated as a key focus around the creation of new places, including new towns. There is also a call for digital infrastructure to be included in local plans.

The industry now awaits the publication of the revised NPPF in the summer, and local plans will be expected to adhere to the new rules from the start of 2027.

On April 7th, the long-awaited clauses in the Product Security and Telecommunications Infrastructure (PTSI) Act 2022 were implemented, increasing the alignment of the treatment of leases between the Landlord & Tenant Act 1954 and the approach taken as part of the 2017 Electronic Communications Code (ECC). Under the new clauses amend the 1954 Act so that rents will be agreed under the ECC methodology.

The Government has also launched a wide-ranging Mobile Market Review, on how it can support investment in the UK's mobile

networks. Its call for evidence opened on February 10th and closed in early May, and is examining many angles of the sector, including the effectiveness of current spectrum policy, regulation and management, future planning needed for 6G, and service delivery requirements to realise the full potential of 5G SA.

The copper switch off (2027) means the focus on the roll-out of fast and reliable broadband must be sustained. Edward Morello MP tabled an early day motion in May saying that despite recognition that digital connectivity is essential infrastructure, not-spots in West Dorset created serious human, economic and safety consequences", and that worries were exacerbated by the upcoming landline 'switch off'.

Likewise the Government's focus on AI, and AI growth zones designed to smooth the path for large-scale investment into data centres, will be slowed down or impeded if the delivery of 'last-mile' digital connectivity to the end users does not have the reliability or speed required.

Our new data supports that view that policymakers in Westminster are clear about the economic benefits of good connectivity. Some 88% of 103 MPs surveyed in March by YouGov for Cluttons said that digital connectivity will be important in underpinning UK economic growth over the next two years.

OPINION

The Planning View: Consultation on Part 16 of General Permitted Development Rights

SEAN MCHENRY

Managing Director, Causeway Telecoms Planning

The Government has strong ambitions to drive the UK economy. And the important role that digital connectivity plays in this was acknowledged in both the Planning and Infrastructure Bill and the Infrastructure Strategy – including awarding data centres NSIP status and a commitment to reform planning rules around mobile infrastructure.

One key step is the consultation on permitted development, which closed for evidence in February 2026.

The proposals in the consultation focus on easing restrictions for the upgrade of existing infrastructure. This will be welcome given the large-scale rollout of standalone 5G meaning a very large proportion of existing mobile sites will require upgrade. This will also assist VodafoneThree in meeting the obligations placed upon them as part of the merger agreement.

5G SA usually uses higher frequencies – and while this delivers higher capacity for data transfer, these higher frequencies do not travel as well, and this will have a direct impact upon siting and design of mobile base stations – both ground-based and on rooftops.

The proposals in the consultation are focused upon allowing increased height to both ground based and rooftop deployments under the notification procedure, without the need for an application in many cases.

For example, currently infrastructure can be deployed six metres above the height of the building on rooftops outside protected areas. With the larger exclusion zones created by higher frequency, extra height is needed to ensure the rooftops remain accessible while delivering the new technology and coverage. In an acknowledgement of this Government are consulting on increasing the height to 8 metres.

Also rooftop deployments in protected areas under the permitted development rights notification procedure are highly constrained, in practice very little can be deployed without an application for either planning permission, or for prior approval under permitted development. This is problematic in that the vast majority of England's town and city centres, with high concentration of businesses and where the economic benefit of 5G SA will largely be derived, are designated conservation areas. In acknowledgement of this, the consultation includes a proposal to reduce restriction on rooftop deployments in protected areas. This would be a game-changer for connectivity in places like Central London and, perhaps most significantly, would incentivise the right type of development – discreet rooftop solutions off the street scene, negating streetworks sites more in the public domain.

Another key proposal is the ability to upgrade or replace existing ground based masts, adding 5 metres. This is needed because of the higher frequencies – which do not propagate as well or as far or through materials like buildings or trees – so there is a greater need to host antennas higher above the 'clutter'. While this is very much welcomed, there is still some concern that there is a lack of accompanying consultation on permitted width increases – with increased height there are increased structural pressures.

The most ambitious of the proposals is to allow all new pole deployments up to 20m in the streetscene outside protected areas via a permitted development notification without the requirement to apply for permission. This 20m height is a requirement for the reasons previously mentioned and is well justified, but may spark the most debate.

If policymakers get this right, there will be huge benefits for the nations 5G SA rollout and, subsequently, the economy. There will also be benefits to Local Authorities, in that it will negate the need for more basic applications to be determined – this will free up already stretched resources within Councils.

The next step is a response from the Government, which may come in the summer. This will signal which proposals they intend to bring forward under secondary legislation – hopefully in conjunction with the industry.

BELINDA FAWCETT

Belinda Fawcett, General Counsel and Director of Property & Estates at Cornerstone, the UK's leading mobile and digital infrastructure provider, shares her views on how the policy landscape has changed in recent years and on what needs to happen next to deliver the critical infrastructure for the UK.

Over the last couple of years there has been improvement in the level of engagement from Government, and it's very clear that policymakers recognise the importance of digital infrastructure. We can see the conversations changing. It's not just around mobile operators anymore, it's around the actual infrastructure that is required to deliver connectivity.

There have been consultations, calls for evidence, and there is a real willingness among ministers to listen to what we're saying. Developers are also engaging as it becomes clearer there are real benefits to planning for and maintaining infrastructure that is going to deliver connectivity to residents and the surrounding area, which is so important for placemaking. With new developments, it this infrastructure can't be an afterthought, it has to be planned in at the outset, and it must be designed in. Otherwise, you get delays and disruption, and it becomes much harder to install later.

There is still some way to go however if we are to ensure that the investment needed to deliver infrastructure continues at pace. In large urban areas, where there is a lot of redevelopment, we are losing sites. That means we are constantly replacing infrastructure rather than improving or expanding it. As a result we are investing money to stand still rather than building and expanding networks.

The industry can't navigate this alone. The Government need to help us, and the property industry also needs to work with us. Earlier engagement and coordination between developers, local authorities and infrastructure providers will always be beneficial.

> "Digital infrastructure is critical infrastructure and it needs to be treated that way."

We also need a more joined-up approach. Government need to set clearer national guidance so that when decisions are made locally, people understand the importance of digital infrastructure. Digital infrastructure is critical infrastructure and it needs to be treated that way.

We all need to work together to create an environment in which we can invest and deliver faster, and more predictably. Because otherwise we're constantly on the back foot.

The conversation is moving in the right direction, but there is still plenty more to do.

HELEN MORGAN

Helen Morgan, Chair of the Digital Communities All Party Parliamentary Group, MP for North Shropshire outlines the crucial importance of digital connectivity and its role in augmenting UK competitiveness internationally as well as economic resilience.

Digital connectivity is fundamental to the UK's economic growth, acting as the backbone of a modern, productive economy. Reliable mobile and broadband services underpin business operations, enable remote working, and support innovation across sectors from healthcare to agriculture. Poor connectivity directly constrains productivity, limits access to services and weakens competitiveness. This is particularly serious in rural areas where businesses report lost income, operational delays, and reduced efficiency.

The roll-out of digital infrastructure is therefore critical. Investment in full fibre and mobile networks is not just about faster speeds but enabling wider economic transformation. Estimates suggest that widespread 5G adoption could deliver £159 billion in productivity gains by 2035, while full fibre could add £72 billion by 2030. Crucially, closing the digital divide – especially between urban and rural areas – could also increase tax receipts and deliver a strong economic return on investment.

However, there are significant challenges to delivering the necessary infrastructure. These include the logistical difficulty of building in remote areas, planning and land access constraints, and issues with inaccurate coverage data, which can misdirect investment.

Commercial barriers also persist, particularly limited mast-sharing between operators, which undermines the efficiency and reach of initiatives like the Shared Rural Network. Getting this right would present substantial opportunities.

Improved connectivity can drive inclusive economic growth, boost productivity, and enable new technologies such as precision agriculture. It can also enhance public services, improve safety, and strengthen social inclusion.

Ultimately, a well-connected UK is better positioned to compete globally, unlock regional potential, and deliver long-term economic resilience.

The consumer view

Consumers, all of us, are the most important users of digital connectivity. We wanted to get a sense of how connectivity is working for people across the country, and their current thoughts and approach to the infrastructure needed to provide it.

As part of our survey of more than 100 MPs, we asked if their constituents talked to them about digital connectivity.
The answer was a resounding yes. Only 9% of MPs said that digital connectivity had never been raised with them by people living in their constituency.

When we asked how frequently it was being raised as an issue, some 55% of MPs reported that local residents contacted them about slow or variable broadband connections once a month or more frequently.

Two in ten MPs (21%) said this topic was raised with them once a week or even more frequently. Some 16% of MPs said that constituents talked to them about areas with no mobile phone coverage once a week or more, while 17% said they were having discussions about difficulty accessing 4G/5G connections at a similar frequency.

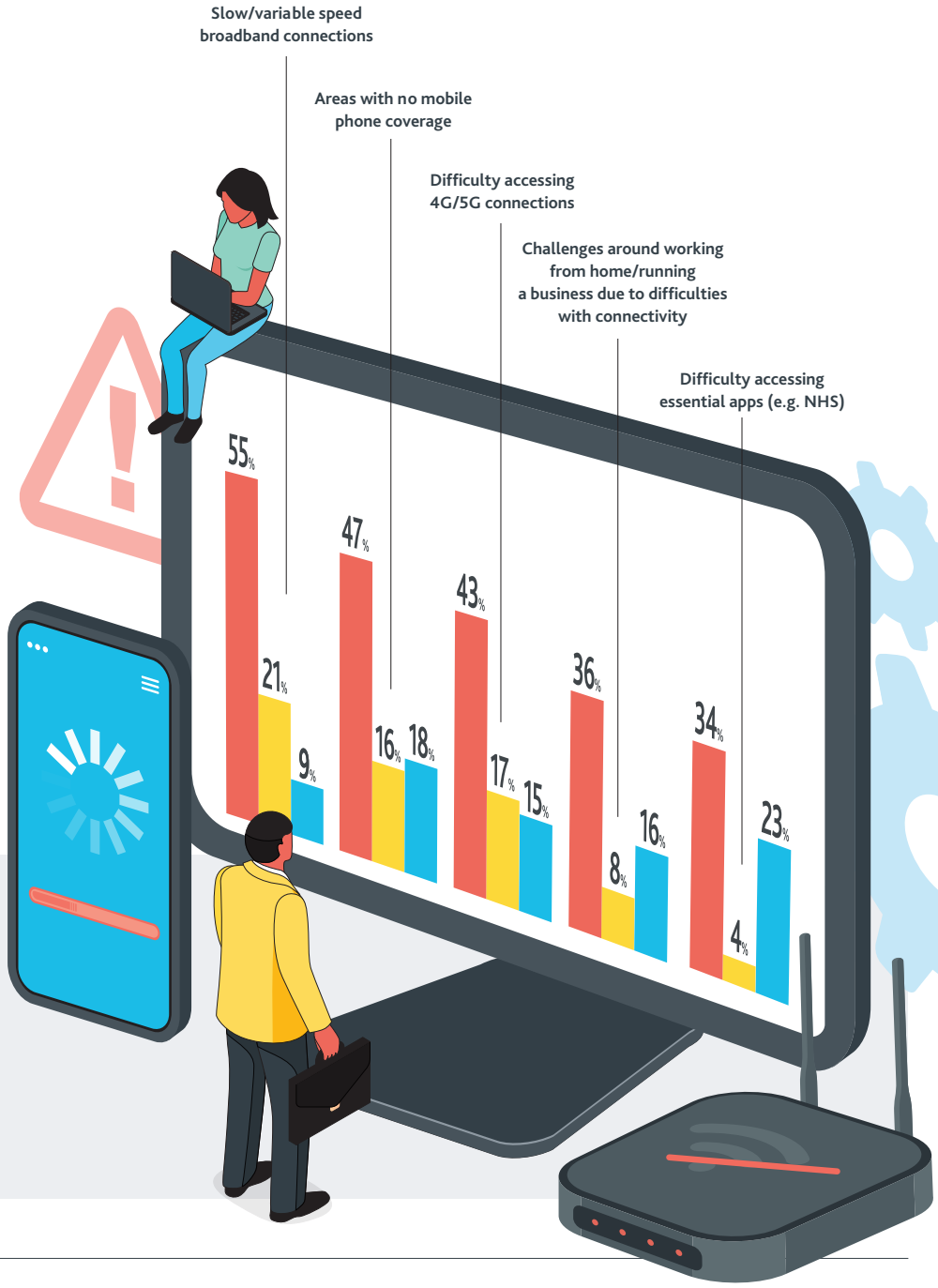
More than a third (36%) of MPs said that they heard details of challenges around people working from home or running a business due to poor connectivity once a month or more.

This underlines that some consumers are experiencing enough challenges around accessing connectivity to raise it with their MP, signalling a real appetite and need for these problems to be addressed. These results indicate that despite positive movements in policy language over the last year, there is still real room for improvement.

88%

of MPs believe good connectivity is important for economic growth

Source: Cluttons, YouGov



How often do your constituents contact you about....

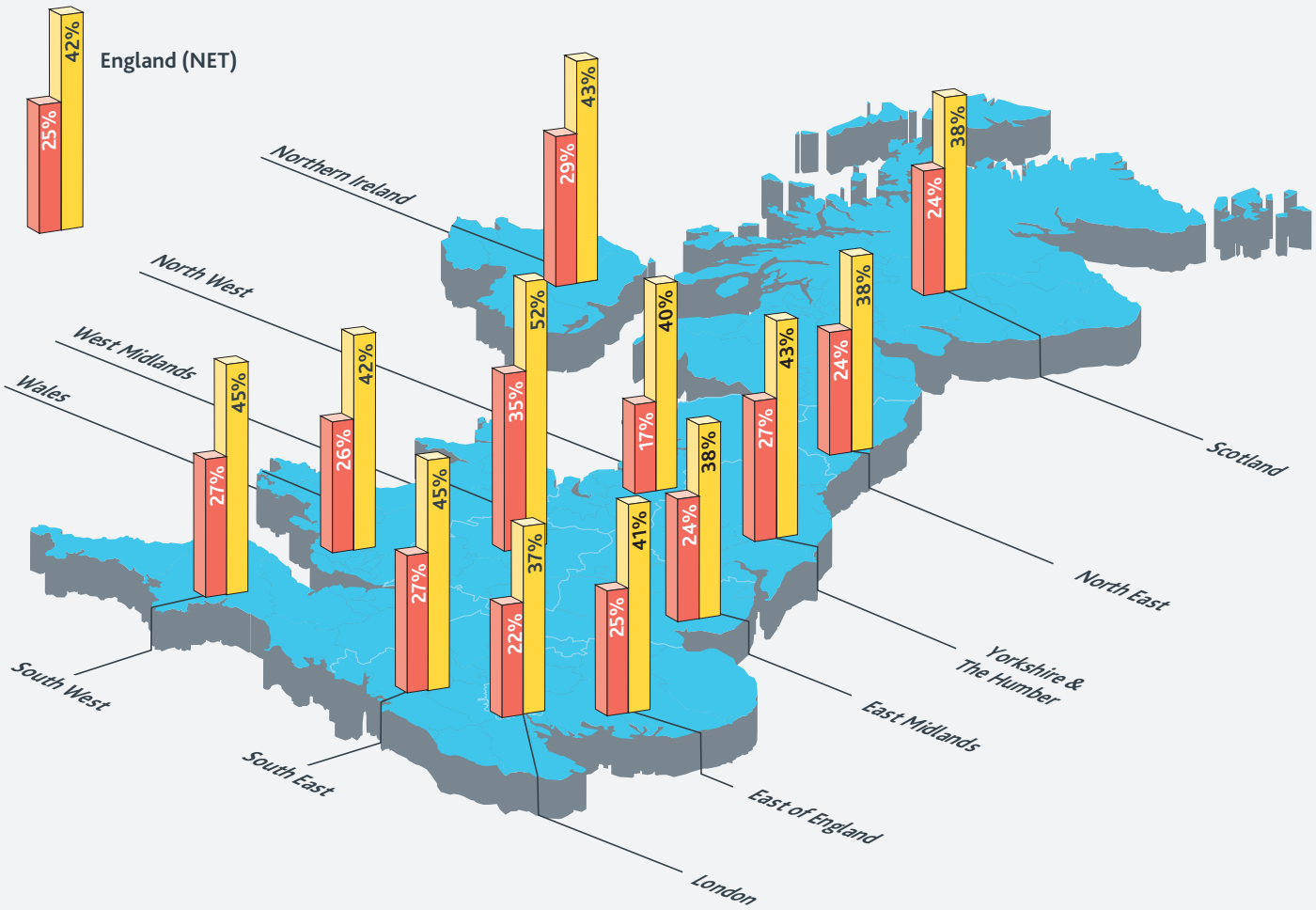
% of MPs

- Once a month + (or more frequently)
- Once a week + (or more frequently)
- Never

Source: Cluttons, YouGov

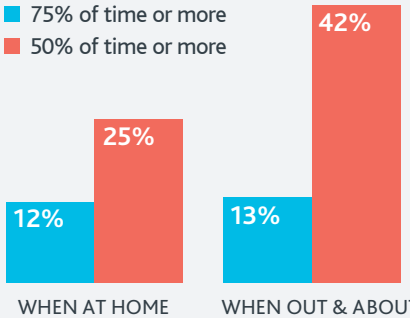
Consumer Survey:

% of respondents who have difficulties accessing 4G/5G for 50% of the time or more



Source: Cluttons, YouGov

Consumers reporting difficulties accessing 4G/5G



Source: Cluttons, YouGov

For a deeper understanding of consumer attitudes to connectivity, and digital infrastructure, we commissioned YouGov to survey more than 2,055 consumers across the UK. Rather than using this to just look at whether there was coverage or not, we wanted to examine how reliable connections were – and so we asked if they had any difficulties accessing 4G or 5G at home, and when they were out and about.

The results were striking. Some 42% of respondents said they have difficulties accessing 4G or 5G half the time (50%) or more when they are out and about, while 13% said it was problematic 75% of the time or more.

When focusing on connections at home, a quarter of respondents said that accessing 4G or 5G was an issue at least 50% of the time.

The results show that most consumers have 4G and 5G connectivity. But the reliability of these connections, often related to capacity, is problematic. In all likelihood these difficulties will be arising at busier times when increasing numbers of users are putting more demand on the network. As discussed on page 8, 5G SA offers higher capacity and

lower latency, but it travels less far, which means more masts are needed to provide an efficient network.

For those having difficulties connecting when out and about, this will also be related to the availability of masts in the public realm, especially on buildings, with increased discussion between landlords and infrastructure providers about installing such infrastructure.

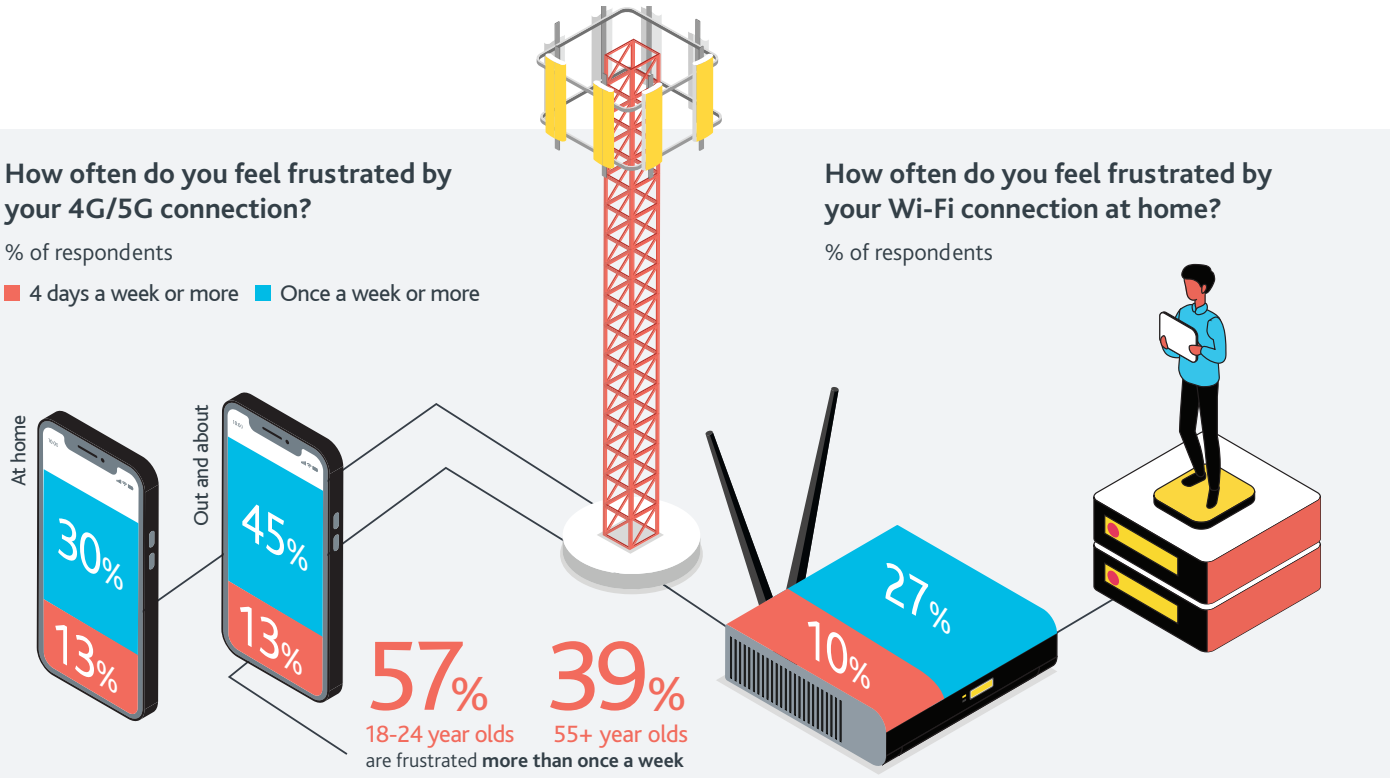
When we break the results down regionally, an interesting picture emerges, with consumers in the South of England experiencing more difficulties accessing 4G/5G when out and about than in any other region.

This is reflected in data from Ookla shared with Cluttons which shows the variance of download speeds across the country. Average speeds in Derby and Leicester are more than 113 Mbps, while Cornwall has average speeds of 27.1 Mbps.

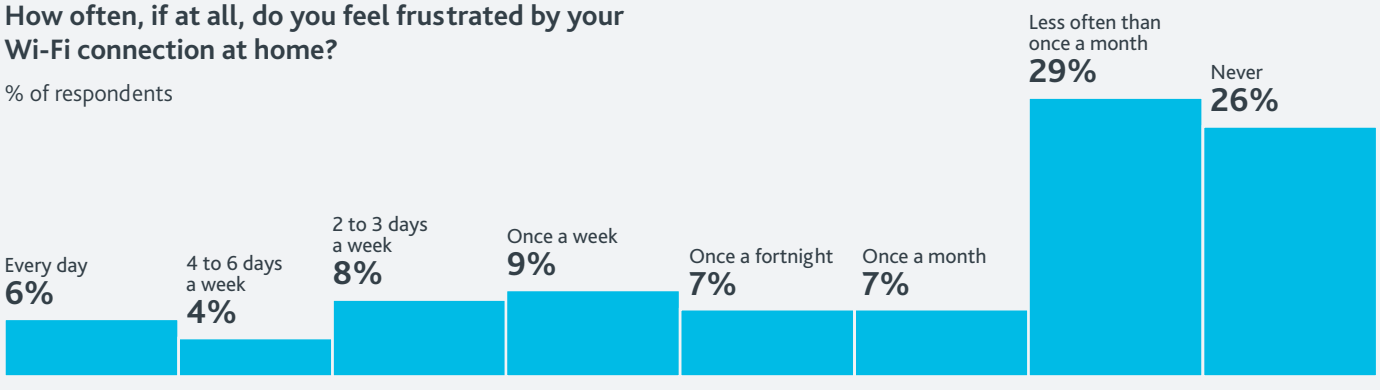
The next question we asked is how consumers feel about their connectivity. When it comes to broadband connections at home, more than a quarter (26%) of respondents said they never felt frustrated (ie with slow or unreliable connection) with their Wi-Fi, while 29% said they felt frustration less than once a month.

30%

of consumers say they are frustrated with their 4G or 5G connection once a week



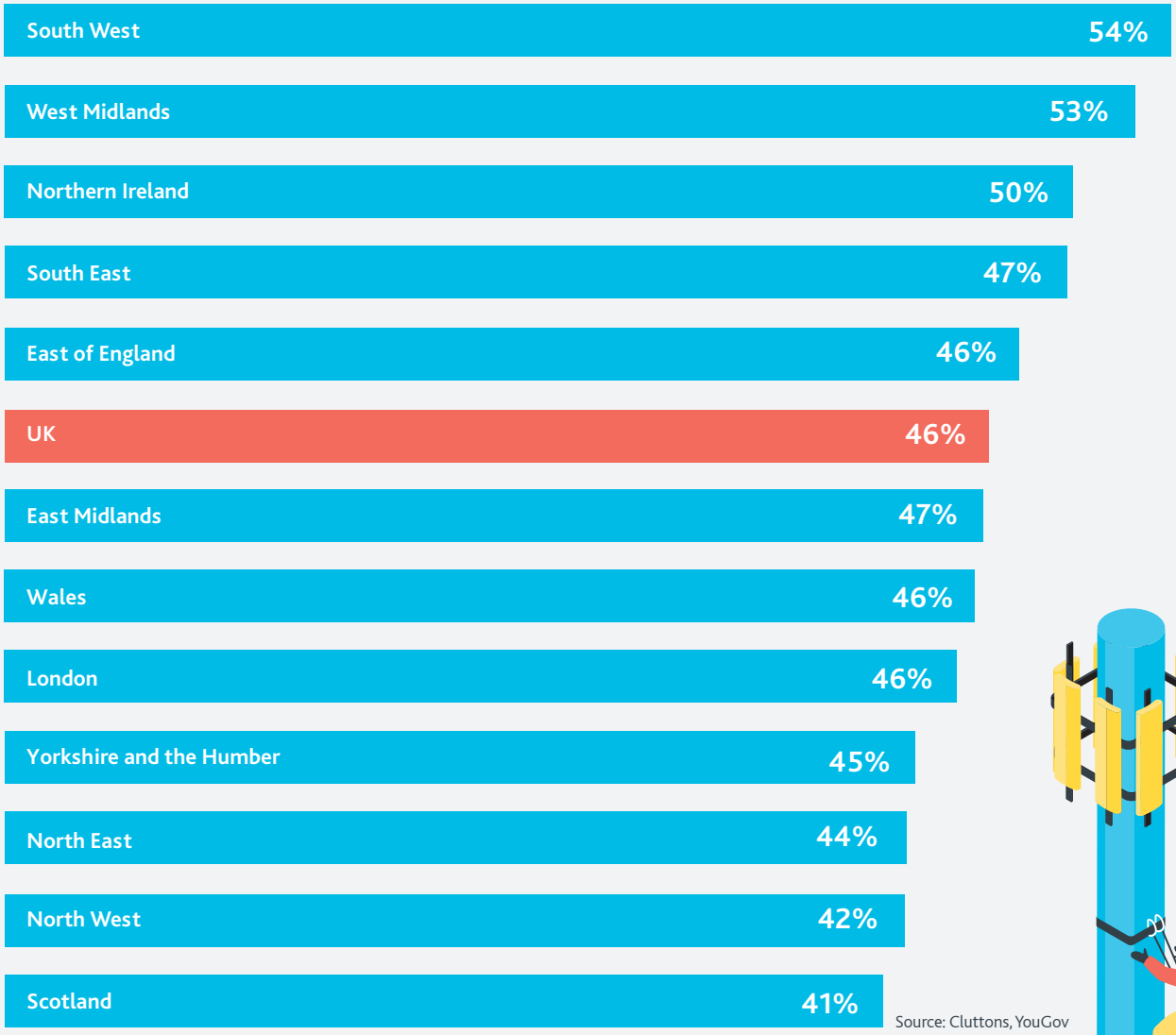
Source: Cluttons/YouGov



Source: Cluttons

To what extent do you agree that new or upgraded digital infrastructure is needed locally to improve mobile coverage and capacity where you live?

% of respondents



Source: Cluttons, YouGov

However, there is still room for improvement, with 27% of respondents saying they felt frustration because of slow or unreliable connections once a week or more.

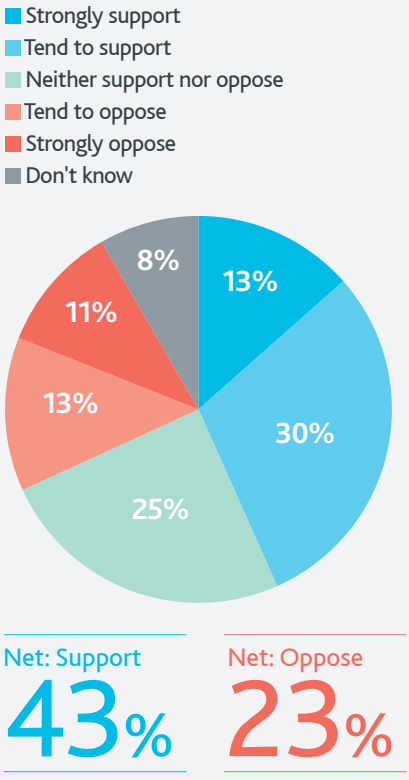
When it comes to 4G and 5G, levels of frustration are higher, with nearly a third (30%) of consumers saying they are frustrated once a week or more when they are at home, and 45% saying they are frustrated every week when they are out and about.

Younger consumers are reporting slow or unreliable 4G or 5G connections more often, with 57% reporting feeling frustration once a week or more, while 39% of those aged 55 or more report the same frequency of challenges.

When asked about the need for upgraded digital infrastructure in their area to improve mobile connectivity in their area, nearly half of respondents (46%) agreed that it is necessary. This significant proportion of consumers identifying the need for masts and cables is larger than one might expect, and signals the change in sentiment towards infrastructure, and how it relates to improving connectivity.

Would you support the installation or upgrade of a mobile mast within 500m of your home if it improved mobile coverage and network capacity? % of consumer respondents

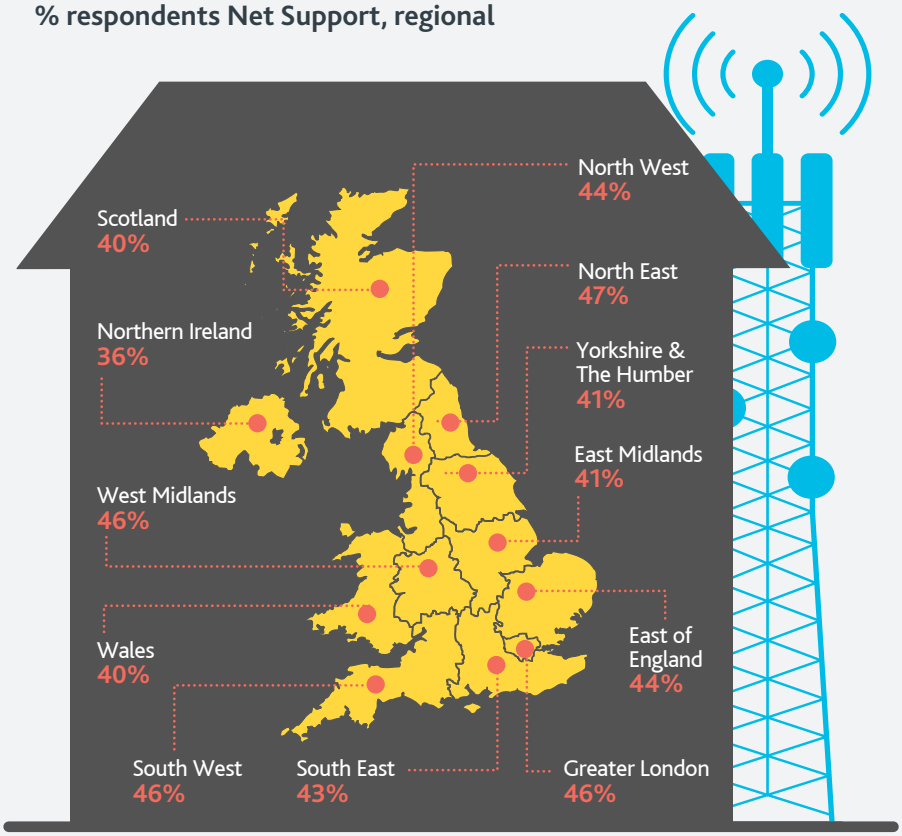
UK average responses



Net: Support **43%**

Net: Oppose **23%**

% respondents Net Support, regional



Source: Cluttons, YouGov

Those in the South of England and Northern Ireland, where Ookla data signals connectivity is more challenging, agreed more readily for the need for infrastructure, with 54% of respondents in the South West saying it was needed, and 50% in Northern Ireland agreeing. This compared to 42% in the North West and only 41% in Scotland.

Some 15% disagreed that there was a need for upgraded infrastructure. Some may well not be experiencing difficulties, so see no need for infrastructure upgrades, but in order to examine this further we asked specifically about installation or upgrades of mobile masts.

The results were striking. When asked if they would support a new mobile mast within 500 metres of their home if it improved mobile coverage and network capacity, 43% of respondents said they would support it.

Younger people were more likely to support, with 51% of 18-24 year olds saying they were in favour, compared to 40% of those aged 55 or over. Those in the North East are most likely to support a new mobile mast in their area, followed by those in the West Midlands and London. Those in Northern Ireland least likely to support such infrastructure (36%), despite 50% of respondents in the country saying that new infrastructure is needed. Mobile download speeds in Northern Ireland are among some of the slowest in the UK.

Even so, the overall number of consumers saying they would support digital infrastructure is higher than might be anticipated – with a further 25% saying they would neither support nor oppose, signalling movement among consumers when it comes to linking connectivity to the infrastructure need to provide it.

While the survey indicates that a significant proportion of consumers have concerns about a mast in their local area, it also indicates a stronger level of support, and a stronger understanding of the benefits such infrastructure can bring. It's likely that these responses may have looked very different ten, or even five years ago, and signals that local and national policymakers may also need to recalibrate their perspective on how people view connectivity now.

51%

of 18-24 year olds said they would support new mobile mast within 500 metres of their home if it improved mobile coverage

The view from the train

Improving digital connectivity on the UK's train network could boost productivity by nearly £3 billion by 2035, according to new data produced for our report.

Last year we highlighted the rise in commuting, especially with more people choosing to live further away from the office during Covid and then spending more time back in the office since the end of the pandemic. But the connectivity on the UK rail network is generally not reliable and means those who would like to work as they travel in and out from the office struggle to do so. Nearly 60% of respondents to our consumer survey who commute by train said they have a stable internet connection half the time or less on their journey. Only 5% said that they always had a reliable connection, rising to 7% for London and falling to 2% in the Midlands. Nearly 40% (38%) of respondents said they were more likely to work more during the journey if there was a more stable connection, rising to 45% for those aged between 18 and 24. Some 44% of commuters in London said they were more likely to work more with a good connection.

Using this data, Assembly Research calculated that by improving connectivity on the rail network to from the current weighted average of 50.4% of respondents who said they had a stable internet connection half the time or more, to 80%, could boost productivity amongst commuters by £2.9 billion by 2035. Even improving connectivity enough so that 60% of respondents say they have this level of connectivity could boost productivity by £400 million by 2029.

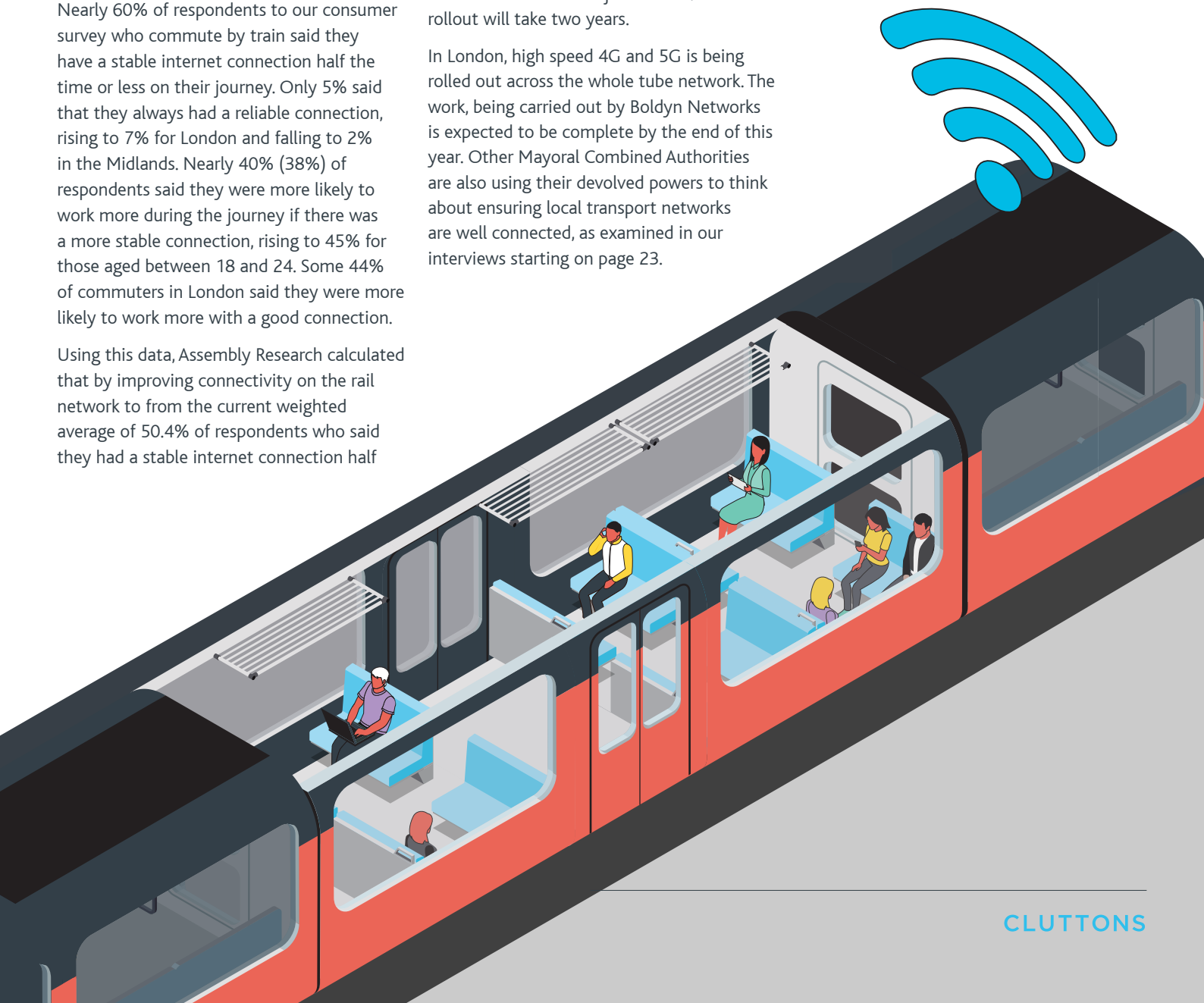
There is work happening to improve connectivity. This year, Network Rail embarks on Project Reach – to improve digital connectivity along some of the UK's busiest rail lines via ultra-fast fibre installed alongside the lines delivered with Neos Networks and Freshwave. It is also targeting persistent mobile "not-spots", including upgrading coverage in 57 tunnels and enhanced 4G/5G infrastructure at 12 major stations. The main rollout will take two years.

In London, high speed 4G and 5G is being rolled out across the whole tube network. The work, being carried out by Boldyn Networks is expected to be complete by the end of this year. Other Mayoral Combined Authorities are also using their devolved powers to think about ensuring local transport networks are well connected, as examined in our interviews starting on page 23.

£2.9bn

Additional productivity by improving UK train connectivity

Source: Assembly Research



The AI view

Artificial Intelligence (AI – especially generative AI – is already boosting productivity and reshaping the global business landscape. Since early 2025, the Government has increasingly referred to the potential of AI as key to its growth agenda, with a focus on accelerating adoption and removing barriers to delivery. To realise these benefits at scale, organisations need resilient, high-capacity digital connectivity; without it, the impact of AI will be constrained.

AI adoption also depends on high-density computing, much of it delivered through centres, particularly hyperscale facilities. The Government has signalled support for data centre expansion across the UK. Measures include designating data centres as Critical National Infrastructure (September 2024) and announcing AI Growth Zones in early 2025, which enable local areas to apply for a designation intended to accelerate planning decisions and improve access to grid connections.

The Government has highlighted its ambitions over the last year. The UK Compute Roadmap, published in July 2025, and updated in March, includes plans to expand the UK's compute ecosystem with £2 billion in funding to 2030. In November 2025, the Department for Science, Innovation and Technology (DSIT) also published a paper on delivering AI growth zones, signalling additional measures intended to make large-scale AI infrastructure investable – covering faster grid connections, targeted electricity price support in some locations, and streamlined planning. However, the potential of AI has two sides. More recently Anthropic highlighted that Mythos, an AI model it developed, had the capability to identify and exploit cyber-security weaknesses, spurring large-scale reactions around the world, including MI5 involved to secure critical infrastructure, warnings from the Bank of England about financial stability, and Government letters to businesses to advise them to bolster online security.

The property view

Digital connectivity is now core infrastructure and should be considered as such by landlords and investors, according to property leaders.

Our interviews with Melanie Leech, Interim CEO of Real Estate:UK, Sam McClary, CEO of the British Council for Offices (BCO) and Alexander Jan, chief economic adviser at the London Property Alliance (LPA) below all highlight that connectivity is increasingly a defining factor when it comes to quality. Fast and reliable connectivity is a priority for tenants – particularly in knowledge-intensive sectors. Businesses do not want issues that could impact productivity during the working day, and the expectation on a landlord is that, especially in serviced, fully managed space, excellent and reliable connectivity will be ready from day one. Landlords and investors who focus on providing this will benefit.

MELANIE LEECH

Interim CEO, Real Estate:UK

How important do you believe digital connectivity is for the success of UK business?

I think it's critical – and if businesses don't think that already, their customers do. And that's what ultimately drives it. If you can't meet customer needs, if you can't compete effectively, then you're not going to succeed as a business. And increasingly, that connectivity is essential to do that. Modern consumers expect that connectivity, whether that's them being able to connect in a building, the services that they're offered, or using data effectively. It underpins so much in a variety of ways. You can't put that genie back in the bottle. That's not to say that it's replacing the need for human connectivity. It's an enhancement. It's a supplement. It enhances that experience in different ways."

How should investors and landlords approach digital connectivity?

It's essential infrastructure: it's as critical as whether people can turn the taps on, and whether people can get to you easily on transport. If you had a checklist of the ten things you need to secure before you even think about making an investment, digital connectivity would be in there for me.

Delivery is different from the spec: you still can't take it for granted. The question is whether we're actually measuring in the right way, whether that's a reliable assessment of in-use experience as opposed to what's being provided on paper.

There's also a tension between the public service of providing connectivity as we're walking around living our daily lives and what drives those needs, against the needs of asset owners delivering particular services in a particular location. Policymakers are more focused on making sure people can use their mobile phones walking around the streets.

Does digital connectivity come up with stakeholders/members (offices, retail, industrial)?

We have ongoing conversations around the Electronic Communications Code and masts. That's certainly a policy issue that we're working on. There's a broader strategic conversation across our property and tech members about connectivity as a differentiator too.

What's your take on data centres?

As a property sector, obviously quite exciting at the moment, there's a lot of buzz and everyone can see the opportunities. But it's still a tiny part of the market, and even if it grows exponentially, it will still only be a small part of the market. It's clearly an opportunity right now, but a real centre of gravity shift? No. One question is whether you'll still need these massive sheds and massive energy supplies in the future, or whether people will find smarter ways of doing what data centres do more efficiently in the years to come.

How do you see AI changing the property sector?

I see AI as a tool for enhancing, for being able to do things better and more effectively, and that plays out at every type of activity in the property sector. I don't see it as a massive threat in the way that the apocalyptic view would be. The centre of gravity is still thinking of it as a tool to automate boring processes, do analysis, or create models – digital twins – rather than at a strategic level. Fundamental challenges require you to rethink your business model, not just to say: what do I do with this, or how do I tick this box? and the role AI will play in the future is still emerging as it re-shapes our wider lives.

SAM MCCLARY
CEO, British Council for Offices (BCO)

Is digital connectivity something that your members are discussing?

We speak regularly to investors, developers, architects, and engineers and connectivity, in all senses of the word, is talked about a lot.

We did a piece of research recently on redefining the market, going beyond. "Grade A" and looking at what defines quality in a workplace today. Connectivity is one of those defining factors.

> "Businesses taking offices want to attract and keep talent, and that talent wants everything to work"

How are they experiencing digital connectivity now?

For buildings, wayleaves and broadband are things you can control as an investor. But if you're in a building and you need 5G, you may have to bring in a specialist company to do something bespoke, unless you happen to be in an area where the infrastructure is there. This can all feel sketchy and random – and raises the question 'can't we just make connectivity across the city really good?' It feels like we're stuck in the middle.

For occupiers, there's a compelling business proposition for companies who can deliver reliable 5G in office spaces. They will be thinking they don't want any issues that could impact productivity during the working day.

What are the risks of not getting this right?

The loudest voice I hear on connectivity is linked to two things people talk about today. First: talent, because my members care about the end user. There's no point in designing, developing, or owning good offices if they're empty. Businesses taking offices want to attract and keep talent, and that talent wants everything to work. So they talk about connectivity in that way. That then trickles down: developers want the best and easiest offer for their customers.

The rise in serviced offices is also a factor. Take the growth in AI/tech businesses that don't know how fast they're growing, many don't want to spend loads of time on fit-out and then realise it's too small. Increasingly firms are asking for fully fitted, fully managed space, the ask is: "I'll just walk in. I know I'll pay more, but I know you've sorted it." And if they can be in a portfolio or building where they can increase space easily without doing anything, they will. Landlords have to be ready for this; they must think about connectivity because it needs to be ready to plug in on day one.

ALEXANDER JAN
Chief Economic Advisor, London Property Alliance

How important is digital connectivity for businesses in London?

Digital connectivity really is a vital "fifth pillar" of infrastructure for occupiers. And given the rise in AI and other digital processes, its quality is front and centre as a selling point for best in class developers. This is particularly the case in central London which encompasses some of the world's leading tech clusters, knowledge intensive businesses, and health and life science activities. The Knowledge Quarter around Bloomsbury, King's Cross and increasingly Euston are good examples of these. AI companies are choosing to locate in central London and it's going to be absolutely essential that digital this infrastructure is both fit for purpose today and future-proofed for growth. This is both to meet their own needs and also to allow the wider "knowledge ecosystem" to thrive.

One of the measures we track in our Global Cities Barometer, comparing major competitor cities around the world, is broadband download speed. Average speeds in the capital have improved but London is still lagging compared to quite a few global cities, so there is definitely room for improvement.

There is a role for us, alongside other groups, is to raise awareness of these issues, particularly with City Hall and also with the boroughs as it is so critical for the London growth agenda.

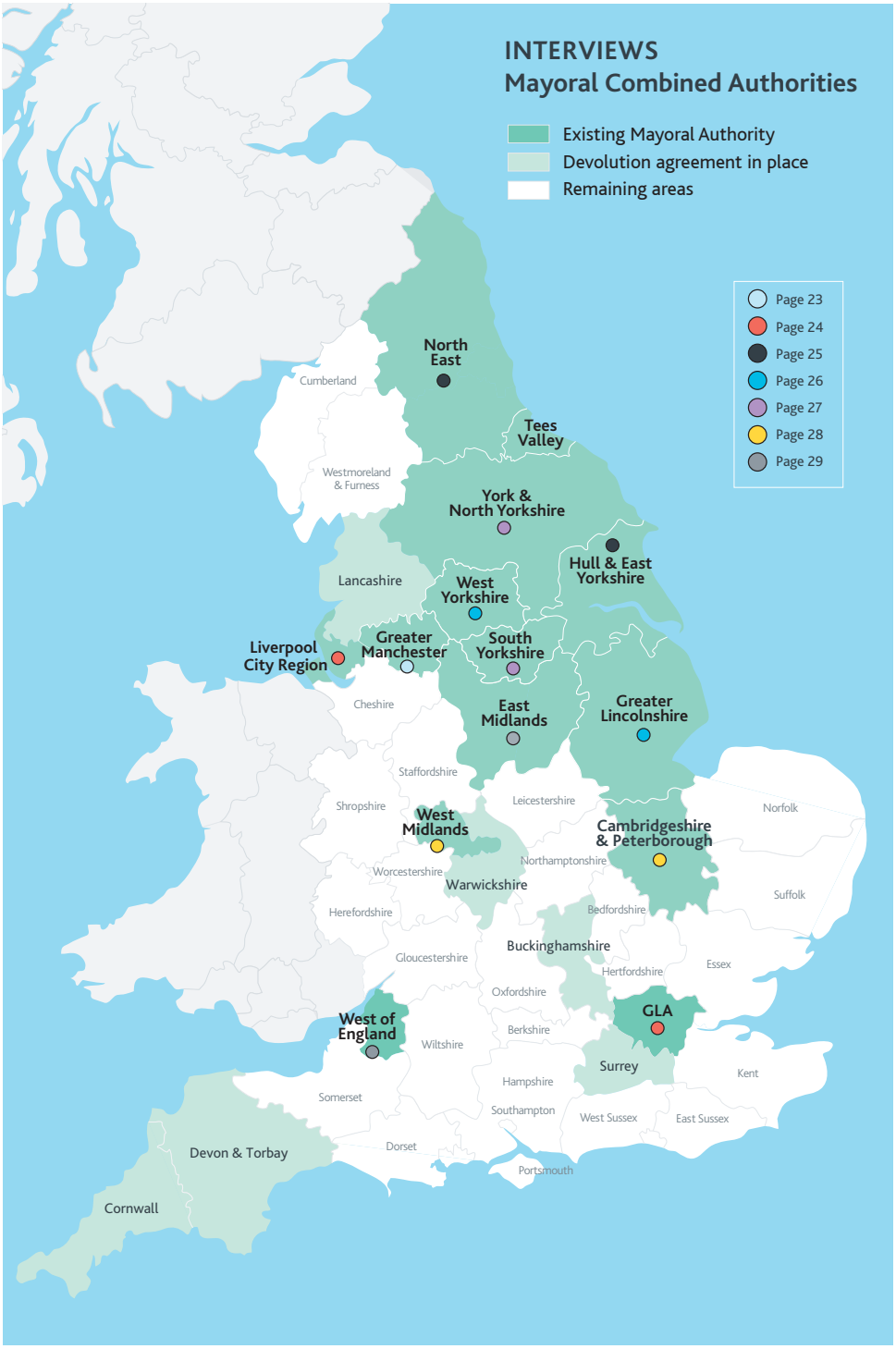
How are landlords and investors approaching digital connectivity?

Ensuring high quality digital connectivity is now a priority for landlords and investors who are focused on securing quality tenants – especially in the sectors we highlighted above. Having the best fixed and mobile connectivity is in the top ten factors they focus on.

It's increasingly seen as a differentiator not just a basic utility. A recent study found that buildings with the highest level of connectivity have rental premiums of around 5%. So if you've got a digitally certified building, you can command a premium on your rent. That's telling us that the market really places value high quality connectivity. In essence, it is essential for commanding the best tenants, the best terms and the highest levels of occupancy.

The Mayoral Combined Authority view

In our previous reports we highlighted the role that Mayors and their teams can play in driving the roll-out of much-needed digital infrastructure by taking a regional approach acting as valuable touchpoints for all stakeholders but also leading a strategic approach to connectivity across their region.



For this report, we interviewed 13 of the 14 Mayoral Combined Authorities (MCAs) in England, including the GLA. The naming conventions for these Authorities are not all the same, but essentially they are a partnership of councils led by a Mayor with a devolution agreement in place and separate legal status.

The interviews over the coming pages back up this view. The majority of the MCAs we interviewed said they had a digital placemaker in a strategic role, although in some cases this role is fulfilled by a team rather than an individual. Of those who don't have such a strategic role, there was some recognition that it was a role that was needed, with one authority highlighting that they were currently recruiting. In general, it is the more recently established authorities who are not as far along the journey, although there was clear evidence of communication between the authorities, with more established authorities happy to share best practice.

All respondents said they believed that high quality digital connectivity was key for boosting economic outcomes in their regions, and many reported that constituents contacted them about issues with connectivity.

There are of course differing outcomes in terms of digital connectivity given some authorities are mainly urban, while other cover large rural areas, but the value of a strategic approach comes through very clearly.

More Mayoral authorities will be established in the coming years, with all authorities set up by mid-2028. There is real opportunity for new authorities to get up to speed very quickly by engaging with some of the most

established authorities, especially when looking at the progress they have been able to drive, both within their own local authorities and with industry.

Earlier this year, the Digital Communities All Party Parliamentary Group (APPG) released a wide-ranging report which included calls for ringfenced Government funding for Digital Champions. This echoed the appeal in our own report for funding support for Digital Placemakers in Local Authorities, and Mobile UK has called for the same.

The evidence in these interviews highlights the power of a Regional digital placemaker or team, who would ideally be supported by counterparts in Local Authorities.

We renew our call for government funding support for Digital Placemakers, whether via Combined Authorities or Local Authorities, and as more Mayoral Combined Authorities are created in England, to save time and funding by using some of the more established teams as a template.

INTERVIEW

Greater Manchester Combined Authority

JOHN DUNCAN

Connected Places Lead for Greater Manchester Combined Authority (GMCA)

Do you have a digital placemaker/ champion in your team – someone with a strategic role?

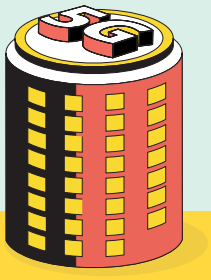
Yes, that's my role. GMCA see it as a key part of our ambitions as a city region – making sure that we focus on digital placemaking. The GMCA includes 10 local authorities, and this role is the key core enabler, shaping the strategic approach between the industry and local authorities and making sure that it's all about the delivery of full fibre and mobile. The breadth of opportunity that comes with good connectivity is reflected in an expanding team focusing on this with me. We have been working on capturing data on mobile connectivity. We have great 4G/5G overall coverage across Manchester – but we're digging deeper than this and checking how user experience matches to this headline data. This new data will help underpin really productive conversations for all stakeholders about the areas on which we will all want to focus. And this also links into our thinking about how we apply connectivity to spatial planning, regeneration and development, and that's why we've been working on digital place plans to ensure we embed digital infrastructure at the same level and importance as the other utilities. Having this strategic overview means connectivity and infrastructure can be at the start of the conversations and benefit everyone in the GMCA.

Do you believe the roll-out of digital infrastructure to deliver high capacity reliable connectivity will boost economic growth in your area?

One hundred percent yes. It is critical, and we treat it as being as core as any other economic driver. You must have good connectivity to be competitive. We see that world-class full fibre and high levels of capacity of 5G connectivity has been a prerequisite for economic growth and for driving our city region ambitions. This digital infrastructure is key for productivity and resilience. Without this level of connectivity, you're going to fall behind. We are seeing increasing numbers of people talking about connectivity in certain locations – and then using that as a decision-making factor. The better-connected, the more attractive the location. Creating places with top-level connectivity also acts as hotbed for innovation. We are big proponents of the fact that we need to have great connectivity for our economy and our places.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

Yes, this feedback usually comes when there are challenges, for example, a local councillor recently got in touch about poor connectivity in his ward and the impact that that's having on his constituents and local businesses. It tends to be more often than not the mobile side rather than the full-fibre side There are areas which are underserved, and this is what we are working to improve across the GMCA.



"As devolution moves forward, we just want to see more powers come to the regional authorities because we think we can demonstrate we can make a massive impact."

John Duncan – Connected Places Lead for Greater Manchester Combined Authority (GMCA)

Greater London Authority

SARA KELLY
Digital Connectivity Lead

Do you have a digital placemaker/ champion in your team – someone with a strategic role?

My role is quite focused – strategic oversight for connectivity. I sit in the Greater London Authority, providing direction and information to support a pan-London approach. My title is Digital Connectivity Lead, focused on digital connectivity infrastructure, investment into London, understanding challenges, and making transparent the information needed. There are three of us in the team, and we support all local authorities and industry upgrading London's digital infrastructure. Some Local Authorities have a digital placemaker, others don't – it's a question of resource. Since 2019, the Mayor has funded dedicated digital champions across all four sub regional partnerships to support local authorities with the resourcing constraints. Resource is a fundamental issue, take mobile infrastructure on buildings, with guidance, those responsible for public sector buildings are more likely to engage and consider how portfolios can support connectivity – sometimes foregoing commercial conversations a private landlord wouldn't be able to do. There is no silver bullet, there are multiple considerations and interventions required.

Do you believe the roll-out of digital infrastructure to deliver high capacity reliable connectivity will boost economic growth in your area?

It's fundamental – especially as an enabler to expand and create new growth areas. It's increasingly seen alongside other infrastructure as essential. Not "utility" in the operator sense, but necessary if we're putting manufacturing or automation in an area. Good connectivity is a hygiene factor – it's all fine until it becomes a problem. People get by, but when they need something more intense and can't get it, it becomes an issue. Through the Mayor's powers, we've used the London Plan to avoid future retrofit by introducing guidance on new developments can support both fixed and mobile infrastructure to avoid this problem. Availability and capacity challenges will increasingly become a problem as adoption rises and London expands. Another challenge is that published measures paint a rosy picture versus lived experience. People can have full bars but can't make a call, update an app, or plan a route. Anecdotally, experience doesn't match what is reported, and word-of-mouth can damage the city's reputation. Policy so far has focused on "a little bit for everybody" rather than high-quality connectivity in intense-need urban areas. We have projects to measure and publish latency in London.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

The comms I'm receiving – via the Mayor and officers, from elected members and then constituents – is now much more "why is this place so poorly connected and when will it get upgraded?". Whereas in the past it was "They're planning to put a mast in my area". That's why digital connectivity is part of the Mayor's Growth Plan. Also businesses say they can't become more productive without the connectivity they need.

Liverpool City Council

LIAM ROBINSON
Councillor

Do you have a digital placemaker/ champion in your team – someone with a strategic role?

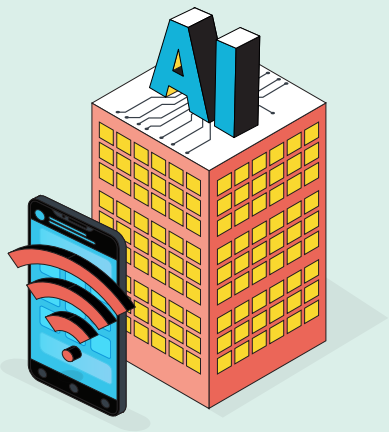
We have a Director of Digital and Transformation, Lorna Robinson, who chairs our Digital Leaders Forum across our six constituent local authorities and oversees the digital team that sits within the Combined Authority on behalf of all six. Part of her mandate is being the strategic leader for regional digital infrastructure and smart city technology, as well as digital inclusion. The role is also tied to transforming all of our services – the days of doing things on paper and relying on gut instincts are gone. We also have a Chief AI Officer leading a regional AI taskforce, the first combined authority in the country to take this approach. One example of where this will be important is public transport, which is coming back under a coordinated and locally controlled model. There's a huge opportunity to harness the power of data-led approaches than has been the case when it was a fragmented approach to the public transport network.

Do you believe the roll-out of digital infrastructure to deliver high capacity reliable connectivity will boost economic growth in your area?

Without a shadow of a doubt. I think the way that we look at this is that connectivity is a basic requirement for modern life now. If you don't have connectivity, then quite clearly it will hold businesses back and the local economy but also hold human beings back in terms of the way that you work. In my own council area of Liverpool, we are very supportive of that new infrastructure, but it's a case of working together to decide where is best for that infrastructure.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

We are a city region that is predominantly quite well served in terms of connectivity, so we don't have a groundswell of people contacting us with issues. Where we are most likely to receive feedback, is at large events. We have many venues in the region, including Aintree and Anfield, and we are always looking out for how we can improve connectivity on busy days.



Hull and East Yorkshire Combined Authority

LUKE CAMPBELL

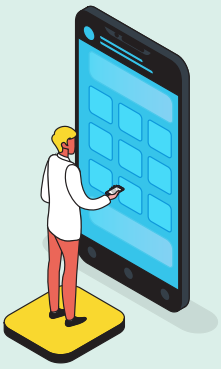
Mayor of Hull and East Yorkshire

Do you have a digital placemaker/ champion in your team – someone with a strategic role?

Hull and East Yorkshire Combined Authority is still a relatively new organisation and we do not currently have a dedicated digital infrastructure lead. Delivery of broadband and mobile networks is led primarily through national programmes, private network providers and local authorities. Our role as a Combined Authority is to act as a strategic partner and convenor, working with Hull City Council, East Riding of Yorkshire Council, government and industry to support strong digital connectivity across the region. Within our Local Growth Plan, digital connectivity sits alongside transport and other infrastructure as part of our ambition to ensure people and businesses across Hull and East Yorkshire are better connected to opportunity.

Do you believe the roll-out of digital infrastructure to deliver high capacity reliable connectivity will boost economic growth in your area?

Yes. High-quality digital connectivity is now essential infrastructure for a modern economy. Hull and East Yorkshire already performs strongly in this area. Gigabit-capable broadband availability across the region now exceeds 90 per cent of premises, which is well above the UK average of just over 80 per cent. Hull itself is close to universal coverage and East Riding also performs strongly. This level of connectivity provides a strong platform for economic growth. Businesses increasingly depend on reliable digital infrastructure to operate, innovate and compete. It also supports flexible working, access to services and the ability for smaller firms to reach wider markets. As we develop major employment sites and investment opportunities across the region, strong digital connectivity will continue to be an important factor in attracting and supporting business investment.



Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

Connectivity does come up regularly in conversations with residents and businesses, particularly in rural and coastal areas where speeds and coverage can still vary. Although the Combined Authority does not directly deliver broadband or mobile networks, we work closely with our local authority partners and national programmes to support improvements where they are needed. Through the Local Growth Plan we recognise that digital access, alongside transport and skills, is an important part of ensuring communities across our region can access work, services and economic opportunity.

North East Combined Authority

ROB HAMILTON

Assistant Director of Economic Strategy

Do you have a digital placemaker/ champion in your team – someone with a strategic role?

In my role as Assistant Director of Economic Strategy, I oversee our digital infrastructure programme and delivery of the North East AI Growth Zone. Delivery of the CA's digital programme is a cross-cutting priority, with leadership at a senior level and strategic roles in our Skills, Strategy, Business Support, and Inward Investment teams. We are also expanding our capacity further, to accelerate the delivery of digital infrastructure projects and the development of a North East Digital, Tech & AI Sector Plan. In carrying out these activities, we work closely with digital leads across our constituent local authorities, including on digital skills and inclusion activity.

Do you believe the roll-out of digital infrastructure to deliver high capacity reliable connectivity will boost economic growth in your area?

Tech, digital and AI are identified as priority sectors within the North East Local Growth Plan. Our digital programme spans connectivity and innovation, digital skills and inclusion, digital adoption support for SMEs, and the delivery of the AI Growth Zone, which is expected to create over 5,000 jobs and unlock up to £30bn in private investment.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

Poor digital connectivity is highlighted as a rural and coastal issue in our Environmental Stewardship, Coast and Rural Growth Investment Plan (2024). Research has shown significantly poorer connectivity in parts of Northumberland and County Durham, impacting remote working and business growth in rural areas. Work continues through local authority digital leads to address these challenges.

> "Our digital programme spans connectivity and innovation, digital skills and inclusion, digital adoption support for SMEs, and the delivery of the AI Growth Zone, which is expected to create over 5,000 jobs."

Greater Lincolnshire Combined County Authority

Greater Lincolnshire
Combined County Authority

Do you have a digital placemaker/ champion in your team – someone with a strategic role?

Greater Lincolnshire Combined County Authority recognises digital infrastructure, innovation and digital skills as central to our long-term economic growth ambitions. The Mayor has made digital capability a clear strategic priority through initiatives including the proposed Mayoral Digital Academy, support for AI and advanced manufacturing opportunities, and work to improve digital literacy across traditional trades and technical education programmes. The Combined County Authority is also bringing together partners across business, education and infrastructure to help shape a stronger and better-connected Greater Lincolnshire.

Do you believe the roll-out of digital infrastructure to deliver high capacity reliable connectivity will boost economic growth in your area?

Absolutely. Reliable high-capacity connectivity is essential to supporting modern businesses, attracting investment and enabling innovation across Greater Lincolnshire's urban, rural and coastal communities. The Combined County Authority has already secured £53 million in additional Local Growth funding to strengthen infrastructure, support innovation and unlock new opportunities for businesses.

Digital infrastructure will also help support emerging sectors including Defence AI, AgTech, advanced manufacturing and energy industries. The Mayor's vision is clear: to make Greater Lincolnshire "the county that invents, innovates and delivers new technologies and creates new markets."

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

Businesses and residents consistently raise the importance of reliable mobile and fibre connectivity, particularly in rural and coastal areas where digital access can still be inconsistent. Strong connectivity is increasingly vital not only for businesses and remote working, but also for education, skills, healthcare access and public services.

As a predominantly rural county, Greater Lincolnshire understands the importance of ensuring communities are not left behind by infrastructure investment decisions. The Mayor has spoken about the need to challenge the historic "urban bias" that has too often disadvantaged rural areas.

Looking ahead, the Combined County Authority will continue working closely with government, infrastructure providers and local partners to improve connectivity, support investment and ensure digital infrastructure keeps pace with economic growth ambitions across the region.

West Yorkshire Combined Authority

FELIX KUMI-AMPOFO
Director of Inclusive Economy, Skills and Culture

Do you have a digital placemaker/ champion in your team – someone with a strategic role?

West Yorkshire Combined Authority provides systems leadership on digital through convening our local authorities and industry to align priorities to deliver improved connectivity, innovation and tackle digital exclusion. We have a dedicated Project Lead that coordinates work across partners in the region related to our Digital Blueprint, which covers digital interventions to support People, Place and Business. The West Yorkshire Local Growth Plan positions connectivity and innovation as core to good growth, including improved digital infrastructure for smarter towns and cities and better access to jobs and opportunity across the region. This is reflected in the approach outlined in the West Yorkshire Digital Blueprint. This year we have established a Digital Infrastructure Advisory Group to engage industry, share intelligence and support coordinated delivery.

Do you believe the roll-out of digital infrastructure to deliver high capacity reliable connectivity will boost economic growth in your area?

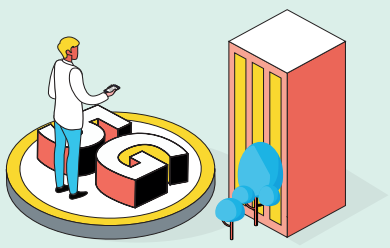
Yes, unequivocally. High-capacity, reliable digital infrastructure is now core economic infrastructure. Our Digital Blueprint is clear that improved connectivity supports productivity, investment, quality of life, and the region has an ambition to lead on gigabit-capable broadband, mobile coverage, and connected places.

The opportunity is particularly clear in transport. Greater digital and mobile infrastructure improves commuter connectivity, enhances rail and bus passenger experience, supports smarter network management, and enables more integrated public transport. As West Yorkshire develops its mass transit ambitions, there is a strong opportunity to adopt a "dig once" approach so transport investment also unlocks wider fibre, mobile, and smart-place infrastructure, in line with national transport policy ambitions.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

Our latest West Yorkshire Business Survey for 2025 shows business use of 5G rising from 43% in 2024 to 56% in 2025, while use of AI, robotics and automation increased from 17% to 28%. That indicates demand for connected services is accelerating, and the infrastructure that underpins them needs to front-run demand.

Residents also see connectivity through the lens of inclusion and access to opportunity. The Digital Blueprint consultation found that 79% of respondents would prioritise ensuring everyone can access digital technologies despite barriers such as cost, skills, infrastructure and location, and increasing residents' digital skills.



South Yorkshire Mayoral Combined Authority

COLIN BLACKBURN
Director Housing & Infrastructure

Do you have a digital placemaker/ champion in your team – someone with a strategic role?

The South Yorkshire Digital Infrastructure Strategy and associated delivery plan sets out a clear vision, goals, and governance framework for accelerating gigabit-capable broadband and mobile connectivity across the Region. The South Yorkshire Digital Infrastructure Strategy Delivery Group comprising of senior officers from the four local authorities and the Combined Authority support and provide local input to the delivery of the Strategy. This Group advises and reports to the South Yorkshire Mayor and SYMCA Board, through the Portfolio Lead for Housing & Infrastructure.

As delivery matures, partners will consider strengthening place-based leadership through a digital placemaking or champion function to complement existing governance and maximise the wider economic and social benefits of digital infrastructure.

Do you believe the roll-out of digital infrastructure to deliver high capacity reliable connectivity will boost economic growth in your area?

The South Yorkshire Digital Infrastructure Strategy is founded on the principle that high quality, reliable digital connectivity is essential economic infrastructure, supporting business growth, investment, and inclusive regional prosperity. The Strategy supports delivery of both the Strategic Economic Plan and the more recent Local Growth Plan and their ambitions to grow an economy that works for everyone. Better and more reliable internet access is a vital part of developing a stronger, greener, and fairer economy.

In South Yorkshire, high capacity, reliable digital infrastructure is a key enabler of economic growth. It helps local businesses become more productive, supports start ups and SMEs, and enables residents to access skilled jobs through remote and hybrid working. Strong connectivity makes our town centres, industrial areas, and rural communities more attractive to investment, reduces barriers caused by geography, and supports key sectors such as advanced manufacturing, logistics, health, and education. Ensuring dependable, future proof digital infrastructure across South Yorkshire

is essential to closing productivity gaps, supporting inclusive growth, and making sure no community is left behind as the economy becomes increasingly digital.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

Businesses and residents continue to highlight the importance of fast, reliable connectivity for daily life, economic participation, and access to services, with affordability recognised as a key factor in digital inclusion. Despite achieving over 96% gigabit coverage, infrastructure has become increasingly fragmented: the team regularly field enquiries from residents, businesses, councillors and MPs around connectivity options or a perceived lack of gigabit connectivity. We are also mapping mobile coverage across urban and rural areas, which provides a clearer picture of connectivity, and has led to increased engagement with businesses and residents. It will help target engagement with network operators where coverage or performance is weaker.

York & North Yorkshire Combined Authority

MILLIE HODKINSON
Policy officer to Mayor

Do you have a digital placemaker/ champion in your team – someone with a strategic role?

We currently play more of a convening role for digital inclusion. We have developed and funded various digital hubs to get more people online in areas that are less connected and have trained digital champions within those hubs to support users. In terms of a strategic role with a sole focus on digital connectivity, there isn't one at present. We are a relatively new Combined Authority, established only two years ago, and we're still doing a lot of work on what we want our strategic direction to be over a lot of different areas. But digital connectivity does feature as a priority driver of growth in our Local Growth Plan.

Do you believe the roll-out of digital infrastructure to deliver high capacity reliable connectivity will boost economic growth in your area?

Yes, absolutely. It's important for all businesses, but it becomes even more so in an area like ours which receives high numbers of tourists. We welcome large influxes of visitors, especially in the summer months, and it is so important that we have the infrastructure to make connectivity reliable and seamless at all times, so that these visitors can book tickets, book restaurant tables and use contactless to pay for goods, all feeding into our local economy.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

It's not something that the Mayor sees a lot, but we engage with the local Members of Parliament within the region and I know it's something that they do discuss with constituents.

Cambridgeshire and Peterborough Combined Authority

TIM BELLAMY
Assistant Director of Transport

Do you have a digital place maker/ champion in your team – someone with a strategic role?

Our digital connectivity programme (aligned with our Digital Connectivity Strategy 2025-2029) is managed by the Connecting Cambridgeshire team within Cambridgeshire County Council. Connecting Cambridgeshire is a dedicated team led by Sarah Marsh. Our Local Growth Plan is grounded in the idea of "good growth", that is, growth which is productive, inclusive and sustainable. Digital connectivity is increasingly treated as essential infrastructure, akin to transport or energy, enabling innovation, improving productivity, and widening access to opportunity. It is recognised that fast and reliable connectivity is now effectively a "fourth utility", underpinning business activity, public services and everyday life.

Do you believe the roll-out of digital infrastructure to deliver high-capacity reliable connectivity will boost economic growth in your area?

High-capacity digital infrastructure is driving local economic growth in Cambridgeshire and Peterborough, as shown by the Connecting Cambridgeshire programme. By upgrading broadband, mobile, and Wi-Fi, especially for rural areas and small businesses, it promotes participation and supports new sectors like AI and connected mobility. The region now has gigabit broadband coverage above 90%, surpassing national targets. However, inclusion remains crucial to ensure investment tackles inequalities. Evidence shows that quality digital infrastructure boosts productivity, innovation, and opportunity, particularly when integrated with transport, skills, and targeted investments for fair, resilient growth.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

Businesses and residents continue to face challenges with both mobile and fibre connectivity, especially regarding reliability and coverage in rural and fringe areas. Patchy signals and unstable broadband affect SMEs and home workers by limiting access to cloud services, online transactions, and video calls. Digital inclusion remains an issue due to affordability and skills, creating a gap in a region known for innovation.

Programmes like Connecting Cambridgeshire have improved gigabit broadband and overall coverage. Moving forward, efforts should target hard-to-reach areas, enhance collaboration with network providers, and prioritise mobile connectivity. Addressing digital inclusion must be central, ensuring infrastructure investment leads to real economic and social benefits, and focusing interventions where connectivity limits growth and opportunity.

West Midlands Combined Authority

JUDITH FERRARIN
Head of Barrier Busting and Connectivity

Do you have a digital place maker/ champion in your team – someone with a strategic role?

There's a mixed picture across local authorities when it comes to digital champions or place makers. One authority has a small team focused on this area, but in most cases these roles aren't formally funded, which makes it a significant ask. In truth, every authority ought to have a dedicated digital champion.

My role as head of Connectivity takes on a strategic facilitation role across the Combined Authority, representing all the local authorities on digital expansion and helping to keep efforts aligned.

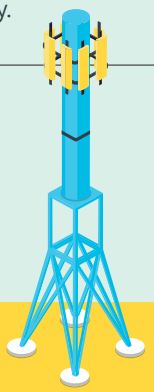
Do you believe the roll-out of digital infrastructure to deliver high-capacity reliable connectivity will boost economic growth in your area?

Absolutely – without question. The impact runs right across the economic spectrum, from supporting business growth to tackling digital exclusion. If people don't have access to the right tools and connectivity, they're locked out of opportunity. Improving infrastructure brings those strands together – it all feeds into stronger, more inclusive growth.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

They do, although concerns are usually raised with local authorities or the Mayor first, and then it can filter through.

The most common issue is around infrastructure itself – particularly mobile masts. People want better connectivity, but they're often reluctant to see the physical structures in their immediate area. It's a familiar tension: the demand for better service, without always accepting what's required to deliver it.



"People want better connectivity, but they're often reluctant to see the physical structures in their immediate area. It's a familiar tension: the demand for better service, without always accepting what's required to deliver it."

East Midlands Combined County Authority

EDWARD HIGHFIELD
Executive Director of Place
Housing Growth, Transport, Climate Change and Green Growth

Do you have a digital place maker/ champion in your team – someone with a strategic role?

Not yet. It's a space that we're trying to move into. Under the main Combined Authority board, we've got a transport and digital connectivity committee. And increasingly there are more questions about the digital aspect of this work. So the plan is to bring someone in to lead this from a strategic perspective.

Do you believe the roll-out of digital infrastructure to deliver high-capacity reliable connectivity will boost economic growth in your area?

Yes, but other things are going to need to be happening. We recognise that we need to create the conditions where that has the effect that we want it to have.

It's probably good enough, but that's probably quite a limited way of looking at it. If we were looking at what's excellent, that would change the dynamic of the conversation entirely.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

Yes, very much, in particular in those rural areas. It's all about that last 5% that can't get 5G and haven't got fibre to the premise. We've got stories of farmers markets where they can't use sum up terminals because they can't get a signal. Basic things that everyone else has taken for granted for five years.

Some parts of the region can't get a Wi-Fi signal to use a portable terminal. From a rural economy, visitor economy point of view, there are some basic gaps.

> "Some parts of the region can't get a Wi-Fi signal to use a portable terminal. From a rural economy, visitor economy point of view, there are some basic gaps."

But there's a dichotomy between rural areas and the cities. In the cities, it's more about digital inclusion, AI, smart technology, digital competitiveness. It's not top of their leaders' inbox in the way that it is in the rural areas.

West of England Combined Authority

FREYJA LOCKWOOD
Digital Innovation & Transformation Programme Manager

Do you have a digital place maker/ champion in your team – someone with a strategic role?

West of England MCA has established a dedicated regional coordination function – *the West of England Digital Office* – working as a single team with our unitary authorities. By providing a single interface for operators, specialist support, and streamlined processes for deploying digital connectivity infrastructure we're making the region 'easy to do business with' for telecoms providers.

This is already delivering results: providers report improved coordination, and we're seeing new investment interest in areas that were previously difficult to serve. The coordinated model is demonstrating that regional approaches work – not just for today's connectivity gaps, but to future-proof our digital infrastructure and tackle the digital divide that affects over 100,000 residents across our region.

Do you believe the roll-out of digital infrastructure to deliver high-capacity reliable connectivity will boost economic growth in your area?

The West of England is the fastest growing regional economy in the country and most productive region outside of London, and digital and tech job growth is stronger than any other region over the last decade. However, digital connectivity is explicitly identified as a growth constraint that we are addressing. Our Growth Strategy puts digital infrastructure at the heart of enabling growth across our region. Parts of the region remain behind the national average on full-fibre, and poor 4G/5G connectivity in some areas is already deterring investment and causing businesses to relocate outside the region.

Digital connectivity is effectively a utility, as essential as transport, energy and water. Our Growth Strategy commits us to future-proofing it: delivering the digital and utilities infrastructure we need to bring the region in line with the rest of the UK and enable our growth ambitions to be realised.

Are local businesses / residents talking to you about the need to improve mobile or fibre connectivity in the area?

Whilst we receive some feedback from local businesses and residents about connectivity needs, our data tells us more, and enables us to target interventions where they're needed most, including in the underserved areas where families are at greatest risk of being left behind. The Digital Office's connectivity mapping gives us granular, premise-level visibility of mobile and fibre gaps across the region. We use that analysis proactively – sharing it with telecoms operators and BDUK to direct investment into areas commercial rollout would not otherwise reach. We also use this technique to future-proof our growth zones by identifying infrastructure needs from the outset.

INTERVIEW

The future view

Nigel Linge
FBCS FIET FITP

Professor Emeritus of Telecommunications, University of Salford

We speak to Nigel Linge FBCS FIET FITP, Professor Emeritus of Telecommunications at the University of Salford, for his insights on the current state of connectivity in the UK, and the next steps to ensure the connectivity delivers for the country.

How do you feel the UK performs in terms of digital connectivity at present?

"If we talk about it on a purely personal level at the moment, living on the outskirts of a city, I've got as much connectivity as I could possibly want, with strong stable broadband and 5G connections. So my perception as an individual is that it's great and I don't have any problems. Now, when we go on holiday in the Cotswolds, I feel differently, or when I am travelling on a train down to London, I feel differently. So I would say connectivity at present is still quite patchy."

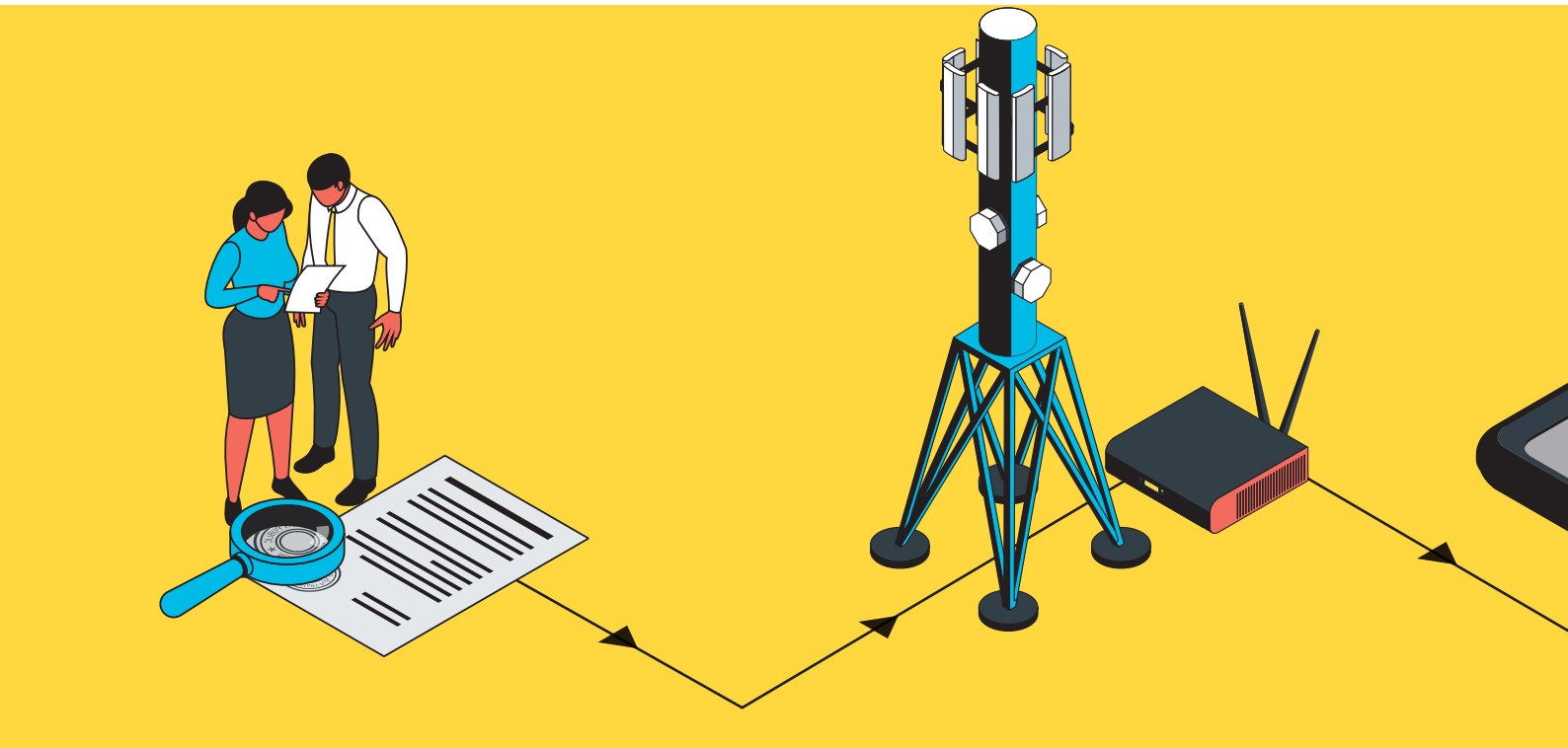
Yet when we look at the figures, the requirement for data is just continuing to climb, so a focus on making sure digital infrastructure can deliver across the board seems key?

"Yes, we just published an article by William Webb in the ITP journal. His argument is that data demands are growing less rapidly now, and will eventually plateau. He says we should not worry about data download league tables as extra speed alone will not always deliver a noticeable improvement in the user experience. Instead, we should focus on ubiquity, that is making sure everyone has the same. So the real focus should be on levelling the playing field and not chasing top spot in the download speed league tables."

"Availability is part of it. That's a better metric because it says the service is available, but then you've got to know the quality of service you are getting. We need that sort of fine scale granularity – we need a heat map showing 4G and 5G connectivity. We can see that some Mayoral Authorities and Local Authorities are already starting to do this, by mapping connectivity at a much more local level."

And to do this you will need infrastructure?

"On the one hand, the public are crying out for connectivity and capacity, but on the other hand, they're saying, 'but we don't want a mast'. We've got fibre cables suspended off telegraph poles in suburban areas, and again people don't always appreciate that this is what gives them connectivity."



The Cluttons view: Final Word

Darren Zitren

Head of Digital Connectivity, Cluttons

The UK's digital connectivity story is often told in targets and coverage maps. These are important, as we highlight in this report. But what we also need to ensure is that below these headlines there a depth of delivery that can cope with higher demand for digital connectivity when it arises and infrastructure that can always deliver a reliable service.

There are some grounds for confidence in the progress that has been made since last year's report. Gigabit-capable broadband coverage continues to move in the right direction, and the acceleration in standalone 5G deployments over the past year is a reminder that progress is possible when incentives, investment and delivery align.

At the same time, our global position underlines an uncomfortable truth, other markets are moving faster, and the gap matters because connectivity is now a factor in where businesses invest, how public services are delivered, and how communities participate in the economy, and ultimately economic benefit for the UK.

Our interviews with the Mayoral Combined Authorities (MCAs) also illustrate a positive shift, a move from seeing connectivity as a purely technical issue to treating it as placemaking. In many areas, those in strategic digital roles are already convening operators, landlords and local partners, and, crucially, building the evidence base to focus not just on coverage, but on capacity and the day-to-day experience of users. As devolution continues, that model is there to be copied and scaled, helping newer authorities get up to speed quickly rather than relearning the same lessons.

The consumer and MP surveys reinforce why this matters. A significant minority of people across the country still experience slow, variable or missing service, and many MPs hear about it regularly from constituents, especially in relation to broadband speeds and mobile coverage. Yet there is also a more positive trend: people increasingly recognise the benefits of connectivity and, in many cases, the need for the infrastructure that enables it. Nowhere is the "experience gap" clearer than on the rail network, where unreliable signal turns commuting time into lost productivity. The case for action is not abstract; it is measurable, and it is felt.

Looking ahead, the priorities are clear. The Government's language has sharpened, and recent policy developments – from planning consultations to changes that affect the market framework – signal intent. But delivery will depend on turning words into actions, smoothing the way for consistent decision-making at local level.

We also need more information to be shared about the importance of digital connectivity, to further shore up the case for infrastructure where it is most needed.

Data traffic is rising, the copper switch-off is approaching, and AI will only increase the demand for and value of high-capacity connectivity. Our challenge for the next year is the same as last, but more urgent: Keep turning words into action, and make high-quality connectivity feel ubiquitous, wherever you live, work and travel.

"Delivery will depend on turning words into actions, smoothing the way for consistent decision-making at local level."

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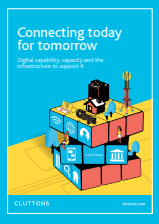
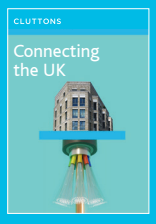
Recent research publications



Connecting today for tomorrow

Connecting today for tomorrow



Connecting the UK

Cluttons UK Offices

Survey data based on YOUGOV poll of 103 MPs carried out between 5-26 March 2026, and YOUGOV poll of 2055 consumers between 31 March-1 April 2026.

With thanks to Ookla, for their support on connectivity data.

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