

Misconnected

How the UK can choose
a better digital future



Contents

Foreword pg 4

Executive summary pg 6

Chapter 1

Lessons from the past pg 9

Chapter 2

How does the UK compare with other countries? pg 14

Chapter 3

What do people really need? pg 26

Chapter 4

The prize of participation pg 45

Chapter 5

What kind of future do we want? pg 63

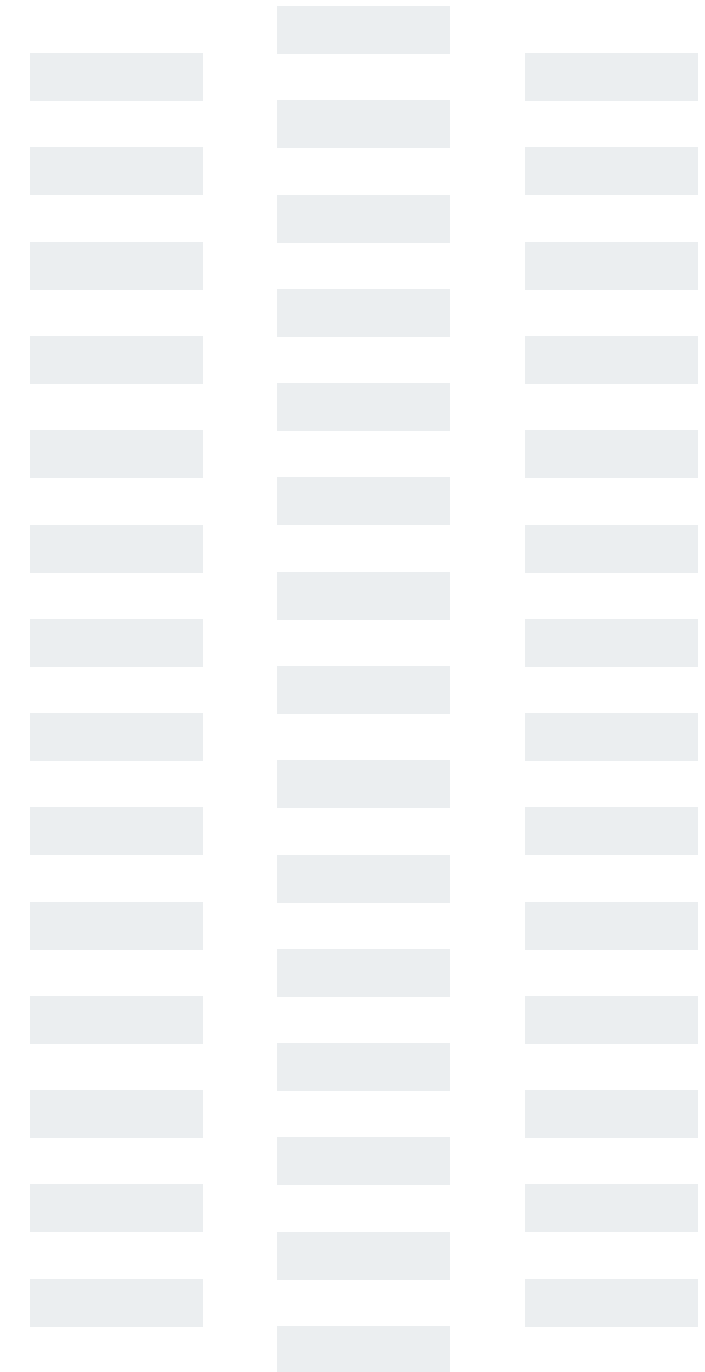
Chapter 6

Managing transition in practice pg 76

Chapter 7

The components of a successful digital society pg 84

References pg 90



Chapter 1

Lessons from the past



How does the UK compare with other countries?



What do people really need?



The prize of participation





“Digital exclusion is the new frontline of social inequality – often penalising those who can least afford it. This data revolution must be a public good that addresses exclusion and levels the playing field for everyone.”

Lord McNicol of West Kilbride



Community and place: participation beyond the individual

Communities function when people can see what is happening around them and take part easily. Increasingly, this takes place online. Shops, cafés, tradespeople and community enterprises rely on online listings, bookings and messaging to reach local customers. Community noticeboards, local marketplaces and social media groups keep spending circulating locally, and many people now search online first when they need advice or practical help, often finding support through organisations such as Citizens Advice, Age UK and local voluntary groups.

GP surgeries, libraries, housing providers, councils and charities also communicate and transact online. Without reliable access, people can lose awareness of what is available to them and can become disconnected from decisions affecting their neighbourhood.

Although more than 98% of the UK has access to ‘superfast’ broadband (speeds of over 30Mbps), rural communities still experience weaker

connectivity than urban areas. Only 47% of rural premises in England have access to gigabit-capable broadband (speeds of over 1,000Mbps) compared with 84% in urban locations,⁸¹ and households in remote areas are far more likely to rely solely on mobile data connections.⁸² Even when they are connected, the experience can be very different; rural residents report lower satisfaction with reception and signal strength (77% compared with 81% in urban areas).⁸³

Translated into everyday activities, at around 30 Mbps, a household can comfortably stream high-definition TV on one device, but it may slow down if several people are online at once. A 1 gigabit (1,000 Mbps) connection is fast enough for multiple people to watch ultra-high-definition TV at the same time, work from home with large file uploads, make video calls and run smart devices without noticeable buffering or delay.

This is important because increasingly, connectivity shapes economic opportunity. Remote and hybrid work expands employment options for rural residents, who already work from home slightly more than urban populations (34% versus 30%).⁸⁴ For local businesses, online sales, digital marketing and booking systems extend markets

far beyond geographic boundaries. In sectors such as agriculture, reliable connectivity also underpins data-driven production methods that improve efficiency and sustainability. This reflects the direction of the government’s Industrial Strategy, which links regional growth to workforce capability and dependable digital infrastructure embedded in everyday business activities.

Increasingly, digital participation now determines whether local economies can remain viable, or whether they hollow out. Communities with reliable connectivity and participation are more likely to gain visibility, opportunity and resilience. Emerging evidence suggests that digital connectivity is now factored into property values, with studies estimating uplifts of between 1 and 3% where homes gain access to faster broadband, with estate agent data showing higher demand for properties marketed with fibre connectivity.⁸⁵ Many nations and regions of the UK have recognised the importance of connectivity but have taken different approaches to connectivity investment, skills support and local economic strategy. Areas where support and service design develop together are better able to convert digital access into productivity and participation. In this sense, digital transition is as much a local economic policy challenge as it is a national one.

Public services

Public services face a distinctive version of the challenge described in this report. Like universal industries they must serve everyone, but unlike most private services they can’t choose their users or withdraw provision. They must work for the whole population, all the time.

Recent policy direction reflects this reality. The government has published a *Digital Inclusion Action Plan: First Steps*,⁸⁶ which emphasises that digital inclusion is crucial for reducing inequality in employment, health, and access to services. In March 2025 the Prime Minister placed digital transformation at the centre of public service reform, arguing that coordinated digital change could deliver efficiency savings of up to £45 billion – comparable with annual local authority spending on adult and children’s social care.^{87,88} The Chief Secretary to the Prime Minister’s “Move Fast. Fix Things” speech⁸⁹ set out the same expectation from the citizen’s perspective – suggesting that if banking and shopping can be made to work well online, public services should too. The proposed response was a common digital platform, with the GOV.UK app as the front door, followed by the creation of the CustomerFirst unit within the

Government Digital Service. These ambitions will rely on people being connected and participating online.

Health and social care

Health and social care sit at the sharpest edge of the transition. Workforce constraints and financial pressure mean digital tools are one of the few credible ways to improve access and sustainability. The NHS 10-Year Plan acknowledges that parts of the service remain “distinctly analogue”, while setting out a shift towards earlier, home-based and preventative care.

Whether this ambition succeeds depends on people being connected. Technology enabled care already illustrates the dependency. Millions of older or disabled people live alone and manage independently most of the time, but any deterioration can be gradual and go unnoticed. Sensors and monitoring systems can detect changes in movement, sleep or medication patterns, allowing earlier and more proportionate intervention. These approaches are now embedded in mainstream adult social-care practice and have been shown to reduce avoidable hospital admissions and support independent living. (Continued page 55).

Case study:

Liverpool City Region – building digital confidence through local delivery



The Liverpool City Region Combined Authority developed a place-based digital inclusion programme to support residents with low digital confidence, skills and access. The programme was delivered through a public-private partnership which included Liverpool City Region, the Metro Mayor’s office, Lloyds Bank Academy, Vodafone, Assurant, the Financial Reporting Council and others. The scheme has helped more than 5,500 residents get online.

As Cllr Liam Robinson, the Cabinet Member for Innovation, says, “Technology and connectivity play an increasingly central role in our economy and our lives, which is why we’re committed to making the Liverpool City Region the most digitally connected in the country. The increasingly dominant role of connectivity means those who cannot navigate the new digital world risk falling further and further

behind, unable to access jobs and services, and even becoming isolated from family and friends. That’s why I’m so proud of what we have achieved through this – helping thousands of people get online and building the capacity of community organisations to continue to support more people in the future.”



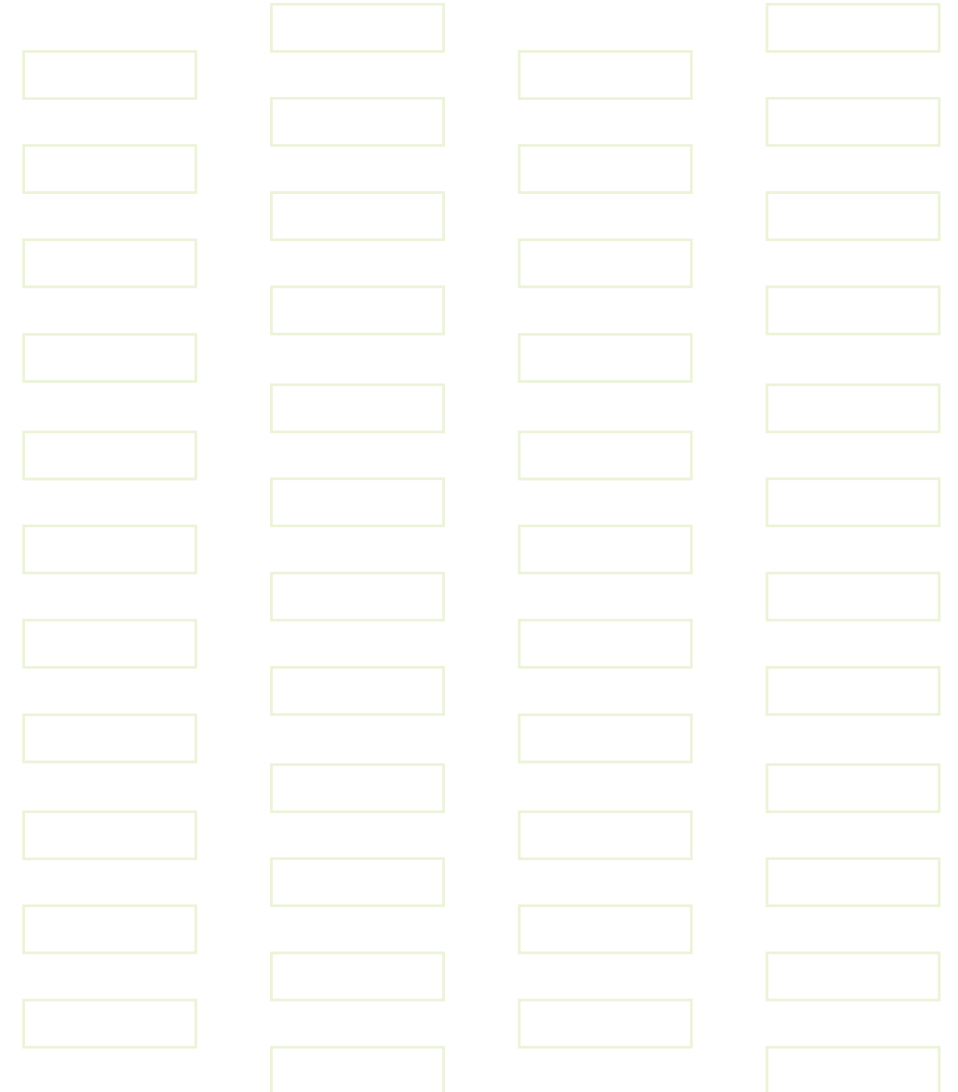
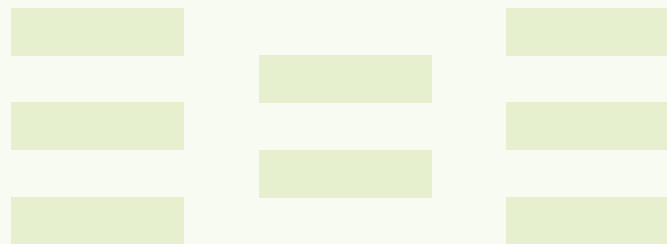
Supporting informed choices during digital change



Ruth Bacigalupo,
Head of the Financial and
Digital Inclusion Branch,
Welsh Government

“In Wales, digital inclusion is treated as both a social justice and economic issue. We want to ensure people have real choice in how they use services and stay connected, whether that’s online or offline. The Welsh Government sets clear national direction, but delivery is led locally. Local organisations can identify problems earlier, fix broken journeys more quickly and reach people often missed by national programmes, including families facing multiple disadvantages and people experiencing poor mental health or housing insecurity.

One of our programmes worked through trusted local organisations to reach people facing digital barriers. More than 2,100 organisations took part, helping an estimated 182,000 people across Wales to build confidence and basic digital skills in familiar settings. This approach strengthens both local economies and community life. By supporting informed choice, rather than forcing a single digital route, Wales is helping more people participate in work, learning and services, while recognising that digital will never fully replace the need for offline options.”



(Continued from page 51).

Their effectiveness depends on infrastructure outside the care system’s control. Remote monitoring, shared records and mobile working all require reliable home connectivity. Even for people who never actively use the internet, connectivity underpins safety. It is becoming part of the basic infrastructure of modern care.

Education and skills

Education already operates as a digital service. Schools set work online, communicate with families digitally and rely on platforms for teaching and assessment. OECD analysis shows that lack of access and skills compound existing disadvantages among children. Guaranteed devices and connectivity allow pupils to complete assignments, use adaptive learning tools and collaborate with teachers and peers. Yet one in five children is affected by digital poverty: around two million lack a suitable device and over half a million lack both device and home internet.⁹⁰

Inclusion particularly benefits pupils with special educational needs and disabilities. Assistive technologies – captioning, screen readers, dictation and structured digital materials – increase independence, engagement and attainment. Department for Education evidence reports improvements in independence (92%), confidence (89%), engagement (86%) and attainment (64%) when these tools are embedded in teaching.⁹¹

The implications extend beyond schooling. 22 million adults of working age – half the working population – can’t complete **all** Essential Digital Skills tasks. This represents both a major skills deficit and the largest single opportunity to improve productivity. Access alone is insufficient; young people who use technology socially don’t automatically acquire workplace skills such as collaboration, communication or cyber awareness. Targeted support is required to turn users into confident participants in the digital economy.

As careers become longer, continual retraining becomes normal. International experience shows that structured lifelong learning systems improve employment outcomes and workforce adaptability.



“In today’s digital world, lacking digital skills is life and career limiting. Yet half people of working age can’t complete all the essential digital tasks needed for work: the very basics. This is the UK’s biggest upskilling opportunity and the route to unlocking productivity and social value at the same time.”

Liz Williams MBE, Chief Executive,
FutureDotNow and Chair
of Good Things Foundation



“Many young people are active users of digital platforms but still lack the skills employers increasingly expect, such as online collaboration, professional communication and cyber awareness. Without targeted support, too many young people struggle to bridge this gap. If we want young people to thrive, we must stop making assumptions about their capabilities and start investing in inclusive support. That means ensuring access to connectivity and devices, embedding digital skills into learning and training, and giving young people the guidance they need to become confident, capable contributors to the digital workplace.”

Sareena Bains, Chief Executive,
Movement to Work

The economy: diffusion rather than invention

The economic case for reliable digital infrastructure is increasingly well quantified. Analysis for Openreach by Cebr estimates that nationwide Full-Fibre broadband could generate around £70 billion in additional UK productivity over time,⁹² while research by Assembly for BT suggests that improved mobile infrastructure could unlock a further £230 billion in economic value.⁹³ As well as faster connections, these gains arise from the wider changes they enable; firms adopting digital tools, services reaching new markets and people participating more fully in work and other activities. Economic value is, however, not only measured in output. When people can participate confidently in digital systems, they are not only more able to engage in work, education and enterprise, but also in civic life.

Research from the Economics Observatory notes that under-investment in enabling infrastructure, weak coordination between sectors, and the absence of clear long-term direction create persistent difficulty

turning innovation into widespread use.⁹⁴ As they note, many firms with strong potential “have not benefited from the diffusion of technology and innovation from the most productive companies”. The government’s Industrial Strategy also emphasises that productivity growth comes through technology adoption and diffusion.

Productivity growth therefore depends on diffusion – the spread of what already works into everyday business practice, public services and people’s working lives. The UK performs strongly at the technological frontier but less well at adoption at scale. A digitally confident population is a precondition for those gains to be realised across the whole economy, but digital exclusion, fragmented systems and ageing infrastructure can act as practical barriers.

A digital economy cannot function efficiently if confidence and capability are distributed inconsistently. Where adoption stalls, organisations must maintain parallel systems, investment is diluted, and innovation scales more slowly. This leads to economic drag. A nation that does not carry the majority with it pays in foregone productivity and in the ongoing cost of maintaining workarounds.

Research carried out by PwC for the BBC and Everyone TV helps quantify the effect.⁹⁵ The analysis is deliberately cautious, presenting lower-bound estimates rather than projections under ideal conditions. The study estimated that digital upskilling alone could be worth around £7 billion a year, even before accounting for the accelerating influence of artificial intelligence – and because the modelling assumes neither full coordination nor widespread take-up, the long-term effect could well be larger.

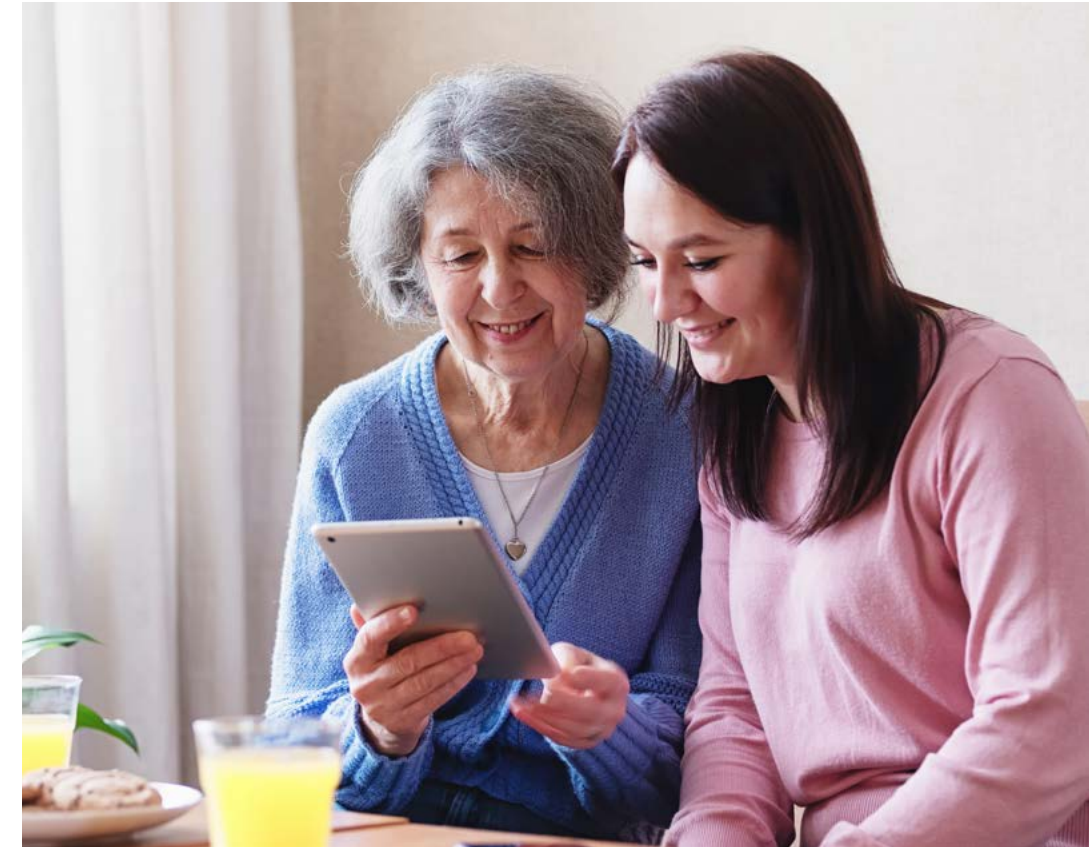
Participation also shapes employment. Reliable connectivity makes it easier for unemployed and economically inactive people to find work, particularly through remote and flexible roles. Evidence from the Superfast Broadband Programme links improved connectivity with higher employment and around £1.1 billion in annual productivity gains.⁹⁶

The study concluded that widespread participation could unlock tens of billions of pounds in additional economic value through productivity gains, employment effects, public sector savings and improvements in wellbeing. Even these figures remain cautious, excluding wider spillovers and the compounding benefits that emerge when adoption becomes coordinated across sectors.



“Digital exclusion is often the result of lack of opportunities, support, training or inspiration, and rarely a lack of interest. When looking to address this, we need to really engage with the fact that people have wildly varied life experiences, and designing solutions for one size fits all will miss huge swathes of the population. Small Business Britain, through the Maple and Lilac Reviews, is looking at how to break down the barriers to access digital skills, ensuring they are available to all and to make sure that you have the same chance to start and grow a business in the UK regardless of your background and experience.”

Michelle Ovens CBE, Founder and CEO,
Small business Britain



Case study:

Feeding the nation without a signal

Nigel Wickham, Farmer, Kent

“My family has farmed for generations. The fundamentals haven’t changed – you still work with weather, soil and livestock – but the tools have. Farming today is a high tech, capital intensive industry, supplying to high tech customers. The modern British farm is closer to an engineering business than a pastoral postcard. Tractors steer themselves using satellites orbiting 17,000 miles above us. Cows wear electronic tags that flag health issues before a human eye would spot them. There are soil sensors in the ground, software in the shed, and data flowing from almost every machine we use. And yet, fifty yards from the farmhouse, the signal can disappear completely.

The NFU’s Digital Access Survey in 2024 found only 22% of respondents had reliable mobile signal across their whole farm, around one in ten reported no 4G/5G access, and 21% were on broadband speeds under 10Mbps.

We have invested heavily in precision technology, which reduces input costs. It allows fertiliser and crop protection to be applied exactly where it’s needed. It cuts waste, improves yields and helps manage environmental impact. But precision farming requires consistent, reliable connectivity – not just in the kitchen next to the router – but across fields, yards and livestock buildings. When connectivity drops, we can’t take advantage of our precision technology to reduce costs, reduce chemical input and maximise yields. Livestock can’t be checked using a webcam from the farmhouse during lambing or calving. B&B guests expect good Wi-Fi, which isn’t always available. None of this is dramatic in isolation, but it adds up, and family farms already operate on tight margins.

If we expect UK agriculture to be productive, resilient and environmentally responsible, the digital foundations must reach beyond the garden gate. The technology exists and the appetite to use it exists. What is missing, in too many places, is the connection that allows it to function properly.”



Society: trust, dignity and cohesion

Much of the value created by digital participation does not appear neatly in traditional economic measures. A significant share is experienced directly in daily life. The BBC / Everyone TV / PwC analysis estimates that full digital inclusion could generate wellbeing benefits worth up to £30 billion annually, largely through improved life satisfaction, reduced isolation and easier access to essential services.⁹⁷

People feel connected and able to participate when systems work well for them. When they do not, they can feel embarrassed, anxious and eventually mistrustful. Over time these everyday interactions can shape how people feel not only about institutions, but also about each other. Digital technology is often discussed as a force that fragments society. Social media environments can amplify division and misinformation, and poorly designed systems can weaken trust. But there is also evidence that well-designed, inclusive digital environments can strengthen social cohesion. Studies of digital public services consistently find better experiences are associated with higher institutional trust.⁹⁸

Participation also affects dignity. When people can rely on access and get support when they need it, more can manage everyday tasks independently rather than relying on intermediaries or insecure workarounds. Research on wellbeing repeatedly links accessible services with higher confidence, participation and life satisfaction.⁹⁹

The effects extend further into social connection. Digital systems cannot replace relationships, but they can help sustain them by making it easier to stay in touch and seek help early. Work on social capital highlights how belonging, trust and connection shape long-term outcomes.¹⁰⁰ Inclusive design supports this indirectly through many small, dependable interactions that keep people engaged in everyday life.

A recent study led by the Royal Society of Arts, the Behavioural Insights Team, Meta and others analysed anonymised data from 20 million people and linked it to long-term earnings records. Its central finding is that the breadth of our networks strongly correlates with economic mobility.¹⁰¹ Children from low-income households living in highly connected areas – where friendships with children from higher-income backgrounds are more frequent – earned 20% (almost £3k) more per year by age 28 than

those in the least connected areas. Economic connectedness proved a stronger predictor of upward mobility than exam attainment. Designed correctly, universal participation can encourage mixing across lines of difference and help reduce isolation, improve mobility and strengthen social fabric.

“Although the evidence base is still emerging, digital connection has clear potential to build social capital by expanding access to wider, more diverse networks that shape opportunity. Evidence shows that these ‘bridging’ connections – beyond immediate circles – are strongly linked to economic mobility and life chances. For many, especially young people, digital access can open pathways to mentors, information and opportunities that would otherwise remain out of reach. These benefits will remain unrealised for millions that are digitally excluded.”

Tom Stratton,
Chief Impact Officer,
RSA

Partial participation is holding us back

This chapter has shown that digital systems are constrained by partial participation. Organisations must retain legacy systems and parallel processes because they can't rely on the main channel to serve their customers or users. Staff spend time correcting avoidable failures instead of addressing complex needs. Families and carers have to compensate for gaps in design. Public services can't reach everyone, and the benefits of innovation can't diffuse across the system.

As participation rises, digital systems can change too. Processes can be standardised and shared infrastructure becomes reliable enough to support coordination across sectors. At this point, the full benefits of digital delivery really become apparent.

The question is therefore not whether inclusion is socially desirable, but whether digital systems can mature without it.

Digital inclusion is often treated as a programme that accompanies transformation. However, our analysis suggests that digital participation determines whether transformation becomes self-sustaining. Seen in this light, digital participation is not a social add-on, but part of the infrastructure that makes growth and reform possible.



Why haven't we won the debate on digital inclusion?



Dr Emma Stone, Director of Evidence and Engagement, Good Things Foundation

“Eight million people in the UK still lack the most basic digital skills. Two million households struggle to afford a reliable connection. These figures represent families unable to book GP appointments, parents anxious about what their children encounter online, older people more vulnerable to scams, and workers missing out on jobs or training. Yet digital inclusion remains on the sidelines. It is rarely treated as foundational to modern life, even though digital technology now runs through almost everything we do. So why hasn't this debate been won?”

Missing: a clear, shared understanding of what people need

Nationally, we still lack a shared definition of the basics every household needs to navigate daily life. Without that clarity, government, businesses and public services operate to different assumptions, and people fall through the gaps. The Minimum Digital Living Standard¹⁰² offers a straightforward benchmark, shaped by the public, for what “good enough” looks like. It is not bureaucracy. It is common sense: the essential digital foundations every household needs to live with dignity, participate fully and stay safe.

Missing: the right data to see what's really happening

Digital exclusion is often invisible. You may not know someone is struggling until they miss an appointment, make a mistake on a form, or fail to understand a bill. Many organisations simply cannot see how digital barriers affect their own customers or communities. Three simple questions – the “indicators of digital inclusion” – can change that. They are practical and

ready to use across sectors. Applied consistently, they would help services identify who is being held back and why, enabling support that works in real life rather than in theory.

Missing: digital inclusion baked into services from the start

Too often, people are left to fend for themselves, relying on family, friends, volunteers and overstretched community centres. That should not be the hallmark of a modern digital economy. This challenge must be everybody's responsibility. Those focused on poverty, health or housing do not always recognise digital barriers. Those working in digital or AI do not always see the human consequences. And those local organisations dedicated to digital inclusion are often constrained by short-term funding.

If this is to change, digital inclusion must be baked in, not bolted on – embedded in the design and delivery of services from the outset. When financial, health and public services are built with inclusion in mind, everyone benefits.”

More than a moral case

“The moral case for digital inclusion is compelling. But it is also a matter of national interest. As cyber threats, scams and misinformation rise, helping people stay safe online strengthens collective security. This is national resilience. A decent digital foundation is now essential to earn a living, manage money and support a family. It is part of a modern standard of living. When people can use digital confidently, pressure on services falls and trust improves. Businesses depend on staff and customers who are comfortable online.



We can win this debate – and some places already are. In Leeds, 100% Digital Leeds has built long-term, joined-up action. In Wales, the Minimum Digital Living Standard is guiding policy. Through the National Databank, mobile networks are providing vital connectivity. And across the National Digital Inclusion Network, thousands of community groups, libraries, banking hubs and local charities offer practical support. These examples show that change is possible.

We will have won when digital inclusion is no longer seen as a “nice to have” or a corporate social responsibility project. When government, industry and civil society share responsibility and work to a common vision. And when digital inclusion is truly baked in – so that everyone can participate, and everyone can benefit.”



What kind of future do we want?



Chapter summary

Over the past 20 years the UK has been making choices, sometimes deliberately but often implicitly, about how digital systems are designed, sequenced and governed. The difference between a coherent transition and unmanaged drift lies in the choices we make now in terms of policy, regulation, coordination and design. Looking internationally, there are some very different models of a digital society, each of which has strengths and weaknesses. We now need to make an active choice as a nation as to what kind of digital future we want.

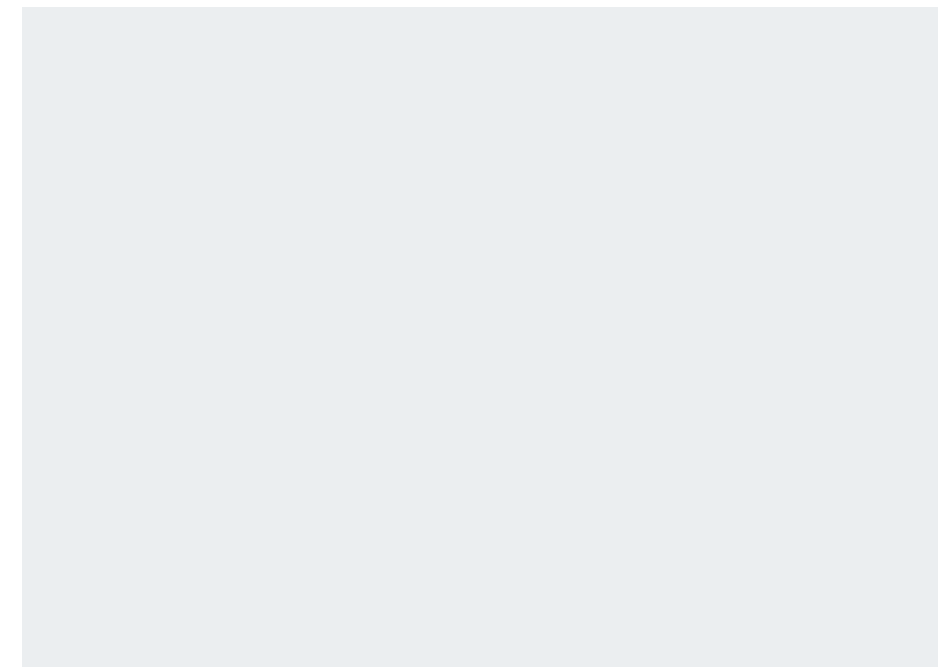
Choosing a digital future

The UK is already navigating choices, sometimes deliberate but often implicit, about how systems are designed, sequenced and governed. The difference between a coherent transition and unmanaged drift lies in the choices we make now in terms of policy, regulation, coordination and design. These choices could plausibly produce very different outcomes over the next decade.



We have been asked whether it is reasonable or even sensible to ask how we can make meaningful choices about the shape of a digital society when technology itself is evolving so quickly. But technological certainty will never arrive, and waiting for it would exacerbate existing fragmentation. During times of rapid innovation, having a clear direction becomes ever more important. The foundations we set now in terms of access, affordability, design standards, support and accountability will determine whether future innovations amplify people’s confidence or compound their exclusion.

We have identified four models that show how a nation can approach digital transition. Rather than being suggested blueprints or predictions for the future, they are illustrative models drawn from our international research. These can help to clarify trade-offs, surface implications and inform a more focused national conversation. They can also help us think more clearly about the destination we are aiming for.



Model 1:

the fragmented digital nation

Digitisation by drift

Allowing digital transition to be market-led and organic can feel as though it promotes individual choice. It is flexible and non-interventionist, and many people find that many services work well, most of the time. But this comes at a cost. Some services feel intuitive and efficient, but others feel clunky or unreliable. People have to navigate new systems, remember multiple logins and jump between online and offline steps to complete a task. The effort and burden is absorbed by end users rather than by the services themselves.

Offline options still exist but they deteriorate slowly and become harder to find. What feels like convenience for most people becomes a barrier for others. Over time, everyday life shifts behind digital doors and people who struggle to access them rely on a shrinking set of imperfect alternatives. For partial digital participants, the cost of living rises, and it becomes harder for people who help others to keep systems working at all.

Fragmentation creates a growing dilemma in universal services like banking, telecoms and healthcare. Organisations invest in modern digital systems but have to maintain legacy routes for a diminishing group of users. This absorbs time and money, locks in duplication, and can inhibit innovation and drive higher costs.

Each new wave of technology exacerbates the problem. The underlying foundations are never fixed, so adoption curves become steeper and faster. Productivity suffers as people and organisations spend time navigating systems rather than achieving their goals. Over time, these everyday frictions accumulate into system-wide costs for industry, the wider economy and ultimately for the public. Over time, fragmented nations risk falling behind because they must continue rebuilding the basics. This drags them backwards regardless of how well they innovate.

Benefits

- Low upfront public coordination costs
- A high degree of autonomy for individual organisations and sectors
- Scope for local experimentation and innovation

Trade-offs

- High long-term costs from running parallel digital and analogue systems
- Distorted competition as new entrants can design services to be digital-only, targeting digitally confident customers. Incumbent providers must maintain analogue channels and absorb the costs of universal access
- Inconsistent experiences that drive frustration and failure demand
- Structural digital inequality as services move online

United States



In the United States, highly decentralised decision-making shapes people's everyday digital experiences. Citizens encounter different systems, rules and access routes depending on where they live or which agency they deal with. Services rarely connect, information is asked for repeatedly and help routes vary widely. For many people, especially those managing health, benefits or employment across state lines, this inconsistency creates frustration and delay – even when services are technically available online.

In summary

Fragmentation feels flexible, but digitising without thoughtful planning actually erodes choice. Cost and effort are shifted onto citizens and frontline services. Without shared foundations, digital change creates confusion, failure demand and inconsistent outcomes, even when intentions are good. Over time, fragmentation increases cost and inequality and makes later change harder, slower and more expensive because each reform must first connect systems that were never designed to work together. At the moment, this model is the path that the UK is closest to, and where we are heading if we make no changes.

Model 2: the state-controlled digital nation

Digitisation by mandate

In a state-controlled digital nation, digital change is led decisively from the centre. All major systems are designed by the state and rolled out rapidly. People are expected to adopt standard services, standards are enforced and mass participation is built into how services operate. For most citizens, everyday interactions feel fast and consistent – almost frictionless. Services work in the same way wherever you live. Onboarding is straightforward and once people are enrolled, they rarely need to re-enter information or work out which route to use. Healthcare, transport, benefits and utilities connect seamlessly. Offline options diminish rapidly but in a planned and coordinated way. Transitions are managed centrally rather than being left to individual organisations or citizens to navigate.

For many people, this feels efficient. Systems work for them and they have few choices to make. But when their circumstances fall outside the norm, or if they want to opt out, question a decision, or take a different route, they have limited options and limited control over what happens. The same consistency that delivers speed can also constrain choice and flexibility.

Trust in this model is largely brought about by consistency and ubiquity. Citizens are expected or required to participate, and consent is implicit in system use rather than actively managed. This can work in societies where trust in institutions is high and/or individual choice is secondary to efficiency and stability. It travels less well into cultures where trust in authority is weaker, and expectations of personal autonomy are strong and reflected in both culture and law.

Civil society and community organisations typically play a limited role. They may support specific groups or edge cases, but they do not shape system design or governance. Lived experience is generally addressed once issues arise, rather than informing how systems are built or how risks are mitigated.

Benefits

- High levels of interoperability by design
- Rapid national delivery at scale
- Consistent citizen experience across services
- Clear accountability for system performance

Trade-offs

- Limited citizen choice and control
- Significant privacy and civil-liberty limitations and concerns
- Innovation constrained to state-defined priorities
- High dependency on central systems, with limited resilience when they fail or are compromised
- Works best where there is a high degree of compliance and broad acceptance that efficiency and scale should take precedence over individual control.

China



China has pursued one of the most extensive state-led digitisation programmes in the world. National digital identity, payments, health, travel and service platforms are tightly integrated, which promotes fast, consistent access in everyday life. However, routine activities are widely traceable, linkable across systems and visible to the state. Data flows between government and approved platforms with limited transparency. Individuals have limited ability to opt out, remain anonymous or challenge automated decisions when problems arise or data is incorrect.

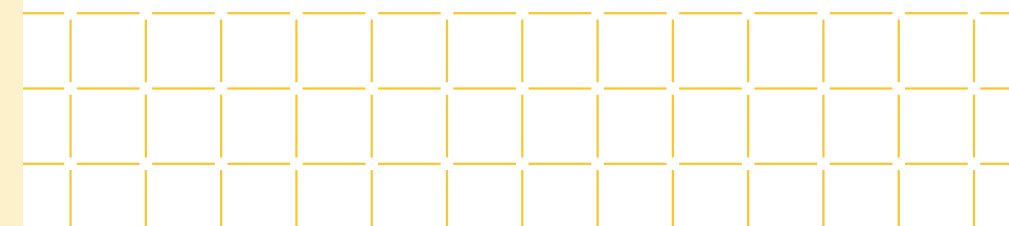
India



India has built one of the largest public digital infrastructures in the world, anchored in a biometric identity system. This has enabled the rapid expansion of digital payments, bank accounts and access to welfare, simplifying service delivery for millions of people. At the same time, reliance on a single, nationally mandated identity system creates rigidity. Biometric authentication failures caused by worn fingerprints, connectivity issues or data mismatches have left some people unable to access essential benefits at critical moments. While the intention is to be inclusive, limited local discretion and weak fallback routes mean that people who don't fit standard patterns can find themselves excluded, with little remedy.

In summary

A centralised digital nation can deliver speed, consistency and scale. Shared digital foundations enable efficiency and interoperability that fragmented systems struggle to achieve. However, these outcomes come at the cost of choice, flexibility and individual control. Trust is assumed, and innovation is shaped by state priorities rather than citizen needs. While effective in some national contexts, this model would sit uneasily with the UK's cultural values, competitive markets and expectations of consent and accountability.



Model 3: the co-ordinated digital nation

Shared foundations, distributed delivery

In a co-ordinated digital nation, services feel joined up. As a citizen, you encounter broadly similar (though not identical) systems each time you interact with an essential service. Common components, such as proving who you are, making payments and accessing support work in noticeably consistent ways across sectors. They are familiar enough to feel predictable, but flexible enough to adapt.

Digital services aren't identical, but they are compatible. You don't need to relearn the basics each time. Information is shared between services securely rather than being asked for repeatedly. This makes individual services quick and easy to use. When things go wrong, it is clear who is responsible for what and how to get help, and redress is visible rather than opaque.

Offline and assisted routes still exist, but they are designed and maintained with intention rather than left to decay. Legacy services are openly switched off to clear timetables and support is available during the transition. People who need support are signposted early, and alternatives are made visible rather than hidden. For many citizens, digital services feel reliable and change feels manageable rather than imposed.

Choice still exists. Organisations design their own services and compete on quality, innovation and responsiveness. The experience feels coherent not because everything is controlled from the centre, but because the foundations are shared and the rules are clear.

This model demands more of institutions. It requires collaboration across organisational boundaries, long-term commitment beyond political cycles and investment in governance as well as technology. Benefits accrue over time rather than immediately, and success depends on discipline in maintaining shared foundations as services evolve even when incentives pull towards fragmentation.

Benefits

- Lower long-term costs through reduced duplication
- More consistent experiences without loss of choice
- Greater resilience as systems can evolve independently
- Stronger incentives for innovation and service quality

Trade-offs

- Higher upfront effort to agree standards and governance
- Slower initial progress than fully centralised models
- Ongoing coordination required across sectors
- Dependence on trust, capability and sustained leadership

Canada



Canada has pursued coordination through shared standards and collaboration rather than central control. Federal, provincial and territorial governments work together on common approaches to digital identity, trust frameworks and service interoperability, but they retain autonomy over delivery. This has reduced duplication and improved consistency in some areas, particularly behind the scenes. Standards set by industry have, in some areas, moved more quickly than formal legislative routes could have achieved. For citizens, experiences still vary by service and location, but there is growing emphasis on making systems connect more effectively. Canada demonstrates how coordination can be built incrementally within a decentralised system without abandoning local autonomy.

Sweden



Sweden combines widespread digital identity and payments with a clear expectation that services work together. Citizens benefit from fast, integrated services across banking, government and healthcare, and they still choose their provider. Support is easily accessible for people who need help. High levels of trust and strong governance underpin the model and allow shared infrastructure without centralised control.

In summary

A co-ordinated digital nation balances efficiency with choice. By agreeing and maintaining shared foundations, it avoids the fragmentation that drives cost and confusion, but it never resorts to central control. The model requires sustained leadership, cross-sector cooperation and upfront investment in governance. But where it is done well, it delivers digital services that are resilient, inclusive and trusted – and a pace of change that people can keep up with in a way that aligns with diverse institutions and competitive markets.

Model 4: The universal digital nation

Designed for everyone, by default

In a universal digital nation, digital services are designed on the assumption that it is normal for people to have different circumstances, capabilities, levels of confidence and preferences. As a citizen, customer or patient, you experience digital services that work well when you can use them, and clear, dignified alternatives when you can't – without having to struggle first to justify asking for help.

Change still happens, but it feels predictable and manageable. New systems come with clear explanations and support, and people are given time to adapt. Digital routes are the fastest and most convenient for most people, but offline and assisted options are accessible, reliable and treated as core services rather than an afterthought. People don't have to fail digitally to qualify for help, which feels fair and respectful. Choice is meaningful. People can use digital services independently, with assistance, or through trusted intermediaries, without penalty or stigma, and without a worse or slower experience.

People feel neutral or confident rather than anxious about change. Support is easy to find, responsibilities are clear and nobody is expected to navigate complex transitions alone. People's trust increases not because systems are perfect, but because they are designed to cope with real life and absorb complexity.

A universal digital nation builds on shared foundations but goes further by treating inclusion as a true design principle rather than a downstream fix. Government, regulators, industry and civil society share responsibility for actively managing transition, ensuring services remain accessible throughout periods of change. Legacy services are supported until people are ready to move on, rather than gradually degrading as usage declines and they receive less investment. Decisions about timing, communication and support are coordinated across sectors, recognising the cumulative impact on citizens rather than viewing each change in isolation.

Benefits

- High levels of trust and public confidence
- Sustainable cost reduction over time
- Greater resilience during periods of rapid change
- Broad participation in digital services and innovation

Trade-offs

- Significant upfront investment in support and coordination
- Slower withdrawal of legacy services
- Ongoing commitment across political cycles
- Complex governance spanning multiple sectors
- More demanding institutional discipline than the market-led or centralised models

New Zealand



New Zealand has taken a deliberate approach to digital government that places accessibility and inclusion at the centre of service design. National strategies emphasise clear language, assisted digital support and designing services around lives rather than organisational boundaries. Digital channels are strongly encouraged but alternatives remain visible, and support organisations are treated as delivery partners rather than safety nets. While challenges remain and implementation is uneven, New Zealand illustrates how inclusion can be treated as a core design principle to create a digitally advanced public service within a relatively small and cohesive administrative system.

Estonia



Estonia is widely recognised for its advanced digital public services, built on secure digital identity, interoperable data exchange and the “once only” principle. For many citizens, interactions with government are fast, transparent and largely paperless. However, Estonia’s experience also shows that high-performing digital services don’t automatically resolve every inclusion challenge. The country has found it essential to pay continued attention to trust, accessibility, support, and affordability, particularly for people with lower confidence or complex needs – and it has been able to build on a comparatively small population and an almost total institutional reset.

In summary

This model is the most demanding. A universal digital nation treats inclusion and trust as foundational. By designing services for difference and managing transitions deliberately, it avoids the hidden costs of fragmentation and the loss of choice associated with central control. This approach is slower and more complex to deliver, but it creates digital systems that people can rely on and a pace of change that society can sustain. This is all far easier to achieve in a smaller nation than a larger one, and when you have a relatively ‘green field’ site. It requires scale, political continuity and institutional cohesion that are easier to achieve in smaller or newly structured states than in large, diverse and market-driven economies.

Which direction do we want to go in?

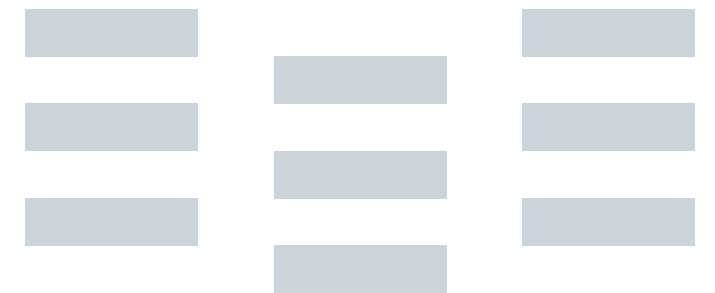
No country fully inhabits one of these models. In practice, nations move between them over time. But they represent fundamentally different starting points for how digital change is approached at a national level. Each model features broadly the same technology – devices, networks and software. What differs is where responsibility sits, how standards are set and whether people adapt to systems or systems are designed to accommodate people. This in turn shapes productivity, public confidence and the sustainability of reform.

Each country grappling with these challenges must decide what works best within its own governmental, economic, social and cultural structures. The model itself matters less than getting the fundamentals in place and making sure they are sustainable. Coordination features in most of the models, but coordination does not necessarily mean central control. In some countries it has emerged through standards bodies led by industry; in others through joint public-private frameworks; and in others through regulatory alignment. In some contexts, consistency and alignment has been achieved through voluntary compacts, sector accords or clear regulatory expectations.

Our research suggests that as things stand in the UK, we will drift into becoming a fragmented digital nation if we do not start making conscious choices. Despite the strong progress organisations are making independently, it is getting more challenging, and now is the time to join up these efforts collectively with the citizen at the centre. We have reached a genuine fork in the road.

When it comes to choosing a direction, the UK’s regulatory landscape is a key consideration. The FCA and Ofcom already hold cross-sector oversight responsibilities that touch the foundations described here: consumer protection, resilience, competition and infrastructure standards. As digital systems converge, their role in maintaining coherence, setting expectations and protecting consumer outcomes becomes increasingly important – even where delivery continues to be led by industry.

The next decade will be decisive. Decisions to retire infrastructure, regulatory reforms and the investment cycles already underway will shape the UK’s digital foundations well into the 2030s. This report highlights many of the challenges we are already seeing today. If we carry on with our approach, we can expect the same outcomes, exacerbated by the pace and scale of continued digital change.



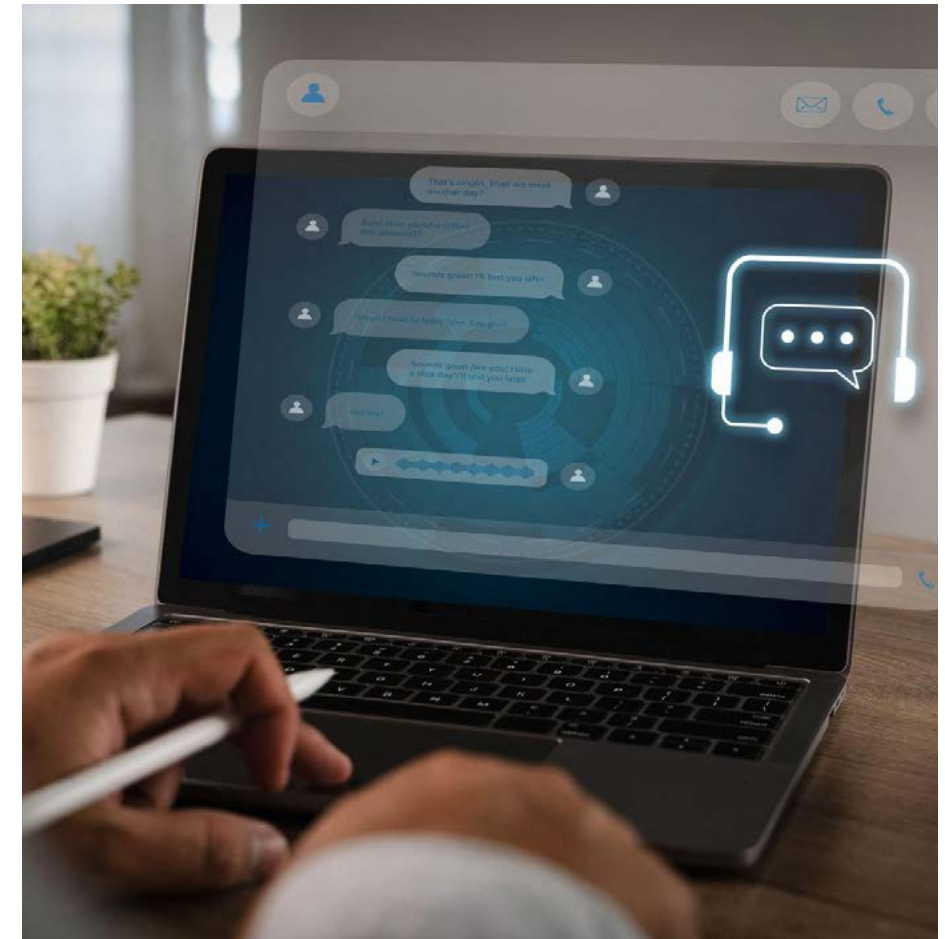
What will AI change?

As well as making existing digital services faster, artificial intelligence is likely to reshape how services are designed, delivered and experienced. AI systems can automate routine decisions, personalise information at scale, detect fraud patterns earlier, translate between languages instantly and support people through voice or conversational interfaces. In theory, this could reduce administrative burden, lower costs and make services more responsive to individual needs.

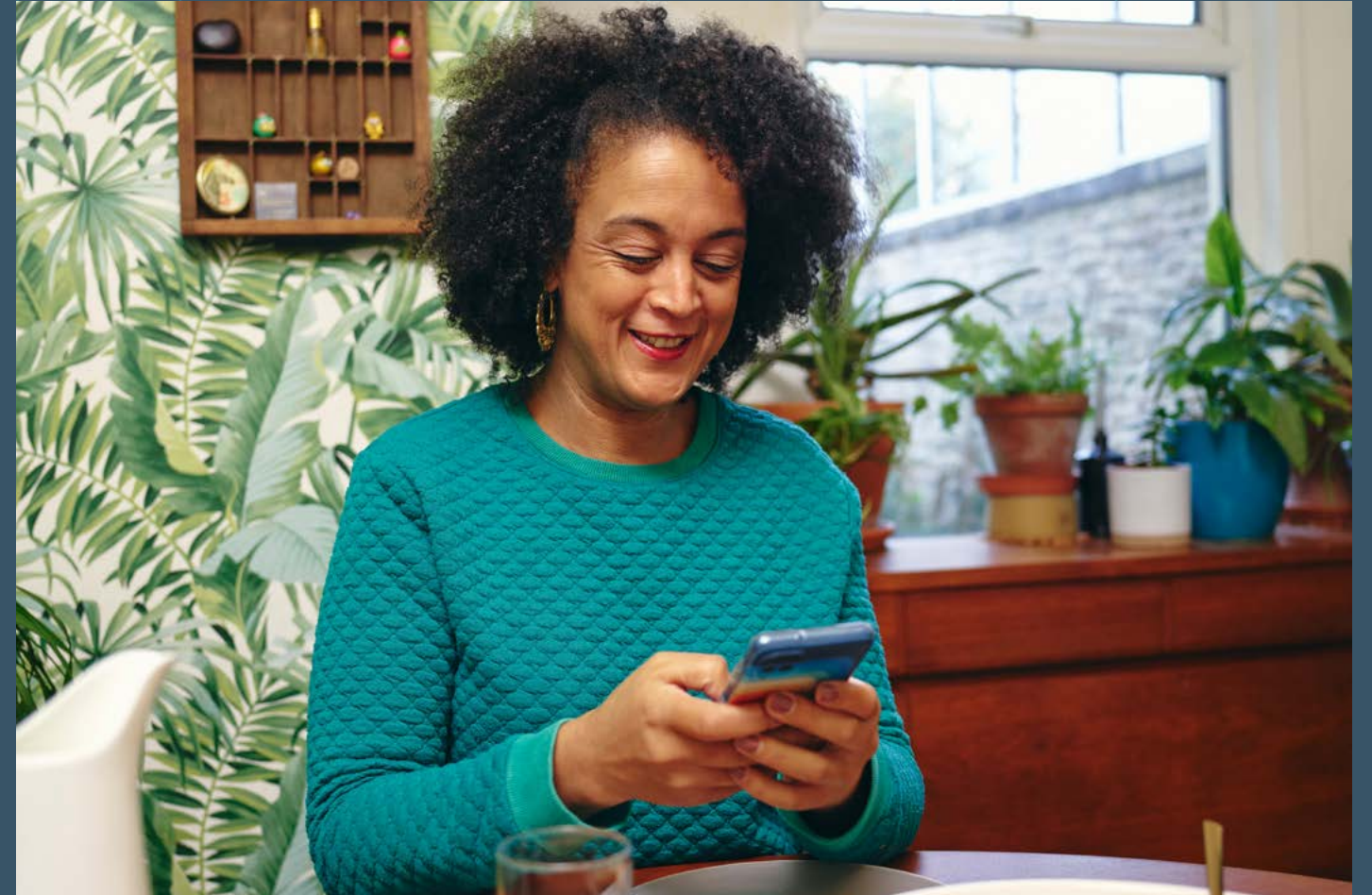
But AI will also change the nature of risk. Decisions that once relied on human judgement may be automated, mistakes can escalate and scale quickly, and bias embedded in data can produce questionable outcomes. The boundary between authentic and synthetic content will also become harder to see, increasing both opportunity and exposure to harm.

Most importantly, AI will raise expectations. If systems appear intelligent, people will expect them to work seamlessly and fairly. But if they don't, people will quickly lose confidence in them.

AI has already arrived. The question now is whether the surrounding conditions ensure that its benefits are shared consistently, its risks actively managed, and that it is deployed in a way that promotes public confidence. The societies that gain the most from AI will be those that treat capability, safety and inclusion as integral to innovation, not as an afterthought.



Managing transition in practice



Chapter summary

Major transitions to everyday services can be delivered successfully when they are carefully managed. Evidence from previous UK programmes shows that success depends on putting people first, ensuring alternatives work well before withdrawing legacy systems, and coordinating change across sectors.

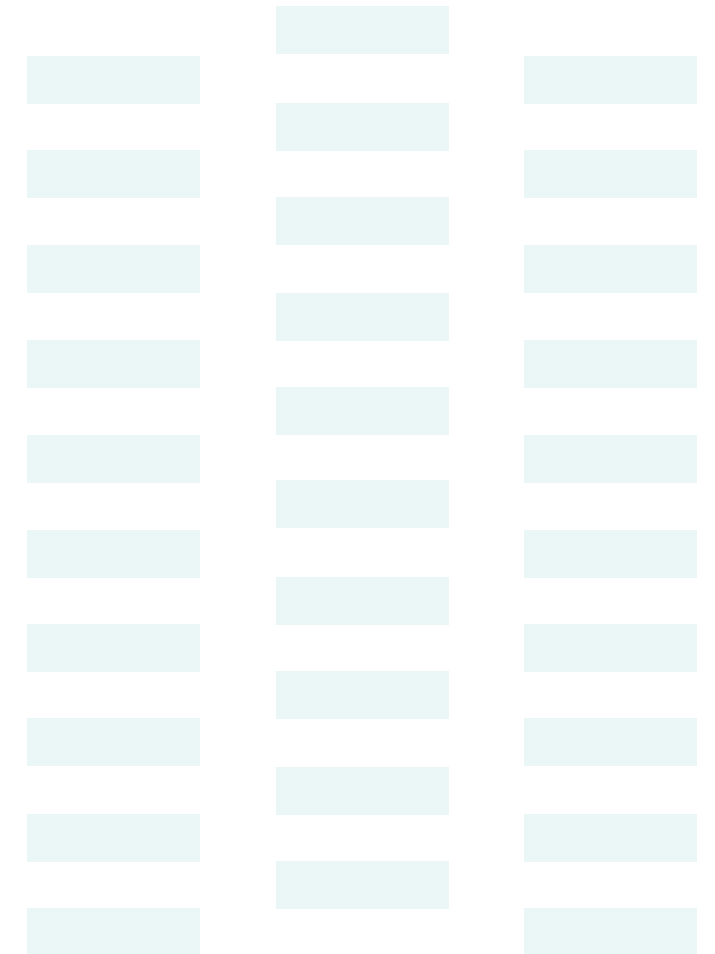
It is easy to talk about digital change in terms of platforms, infrastructure and innovation. It is much harder to help millions of people adapt and change the way they have been doing things for years.

Of course transitions of this kind involve technology, but they also require large-scale behavioural shifts in the way people use everyday services. If they are handled well, they can modernise infrastructure, reduce operating costs and strengthen public confidence at the same time.

Essential services must work for the whole population, including people who are distracted, vulnerable, sceptical or simply busy. The organisations responsible for these services can't choose their users and they can't fail. They can't assume ideal conditions like perfect connectivity, perfect understanding or uninterrupted attention. When change affects payments, communications, transport or broadcasting, the margin for error is small because the consequences are significant and immediate.

The UK has faced moments like this before and managed them well. Digital television switchover, the move to Chip and PIN, the transition to contactless payments on buses, and the ongoing migration from copper to digital voice all required millions of people to adapt. These succeeded partly because the technology worked, but they also succeeded (or are in the process of succeeding) because sequencing, communication, governance and inclusion were treated as central design principles rather than peripheral considerations. Alternatives were introduced before withdrawal, support was visible, deadlines were clear, timelines were adjusted when risks emerged, and frontline staff were empowered to exercise judgement so that small problems didn't escalate.

These examples demonstrate that large-scale change can be delivered safely and efficiently. They also show that success requires explicit coordination, shared accountability and an understanding of how people actually live their lives and use these services. These lessons are highly relevant as the UK navigates the next phase of digital transformation.



Case Study:

Digital TV switchover (2008–2012)

Moving 26 million households from analogue to digital television

Between 2008 and 2012, the UK permanently switched off analogue television. Around 26 million households needed to upgrade.¹⁰³ At the outset, expectations were low. Media coverage predicted disruption and backlash. Some experts suggested that between 10 and 15% would never convert. There were real concerns that older viewers and disabled people would lose access entirely. None of this materialised – but it only succeeded because the programme treated inclusion as critical to successful delivery.

The programme was delivered on time, under budget and with minimal disruption. Coverage increased to 98.5% of homes.¹⁰⁴ Viewers gained more channels, better picture quality, subtitles and recording functionality. Valuable spectrum was released and later auctioned for mobile broadband, raising £2.34bn for the Treasury.¹⁰⁵

Why did it work?

Digital switchover was framed as a national upgrade, not a technical inconvenience. Messaging was clear, consistent and repeated region by region. A visible “digital tick” kitemark and the Digit AI mascot gave coherence to communications across broadcasters, retailers and installers.

Delivery was coordinated. Digital UK brought together government, broadcasters, transmission providers, retailers and charities. The technical programme rebuilt parts of the broadcast network while phasing switch-off geographically, with a year of targeted communication before each region transitioned so that households had time to act before the signal disappeared.

Inclusion was designed in from the start. The BBC Help Scheme proactively contacted eligible households and provided equipment, installation, aerial replacement and a year of aftercare. Around 1.3 million households received direct assistance, with satisfaction above 95%^{106,107}.

This example shows that even a universal service can be transformed successfully when change is coordinated, clearly communicated and inclusion is treated as a condition of progress – rather than an afterthought.



“Telling consumers upfront about the benefit of the change was a key part of what we did. A consistent message, with consistent branding across manufacturers, broadcasters and service providers, was crucial. But working closely with community organisations was the real gamechanger. Ensuring trusted local people were equipped to provide support made all the difference.”

Alex Pumfrey, Digital Switchover
Programme Director, Digital UK

Case study:

TfL: removing cash payments on buses (2014)

Policy changes reflected behavioural ones

When Transport for London stopped accepting cash on buses in July 2014, it was not a sudden withdrawal. It formalised a reality that had already emerged and which made the bus service work better for almost everyone.

Cash use on buses had fallen steadily over a decade. Oyster cards, introduced in 2003, offered lower fares and daily caps, gradually becoming the default.¹⁰⁸ By 2006, cash use represented under 8% of bus journeys. The introduction of contactless bank cards in 2012 was decisive: passengers could now pay with something they already carried. By 2014, cash represented just 0.6% of journeys.¹⁰⁹ The removal of cash therefore followed behavioural change rather than forcing it.

There were clear operational benefits. Cash handling slows boarding, increases dwell time and adds cost and security risk. Removing it improved reliability

and reduced operating costs. But for passengers, the change also made everyday travel simpler and more predictable. Boarding became faster and less stressful, particularly at busy stops. People no longer needed exact change or to queue to buy tickets in advance. With Oyster and contactless, daily fare caps ensured passengers paid the lowest available fare automatically, removing uncertainty about cost. For occasional users and visitors, being able to tap a bank card removed the need to understand a separate ticketing system. What might have appeared as a back-office efficiency reform was experienced on the street as providing a smoother, quicker and more consistent journey. But TfL was clear; no withdrawal until alternatives were widely used and trusted.

Research identified three remaining cash-using groups: occasional users, people who had forgotten their cards, and a smaller group unable or unwilling to pay digitally.¹¹⁰ Mitigations were practical and human. Bus drivers could issue “vulnerability notices” allowing travel now and payment later. Concessionary travel remained protected, and Oyster could still be obtained and topped up with cash.¹¹¹ This all led to faster journeys, simpler operations and sustained public confidence.¹¹²

Why did it work?

The key lesson was sequencing: introduce better options first, allow habits to change, and only then remove the legacy route – with frontline discretion preserved.



Case study:

PSTN switchover – copper to digital voice (underway – ends 2027)

From technical migration to managed transition

The retirement of the UK’s copper-based Public Switched Telephone Network is one of the largest infrastructure changes currently underway. Initially framed as a technical upgrade – moving voice services onto broadband – it quickly became clear that the reality was more complex.

As well as being communications devices, landlines supported telecare alarms, pendant systems and emergency services. Crucially, analogue lines carried power, continuing to function during outages. Early pilots exposed these hidden dependencies. The programme therefore evolved.

What began as network retirement shifted towards a managed transition of an essential service. Governance broadened beyond telecoms providers to include regulators, government departments, local authorities and the care sector.¹¹³ Migrations were paused where risks were identified. Telecare action plans were developed.¹¹⁴ Backup power, in-home testing and compatibility checks became part of the offer.¹¹⁵

Responsibility became clearer: infrastructure operators, retail providers, regulators and health and social care bodies each had defined roles. Ofcom reinforced the principle that customer safety must take precedence over timetable.¹¹⁶

The programme is still underway, but its evolution offers an important lesson: technical readiness is not enough. Inclusion and safety must be treated as preconditions. Slowing down when risks surface is a sign of responsible governance, not failure. Transitions of essential infrastructure demand flexibility, cross-sector coordination and a willingness to adjust course in real time.



“We learned early on that getting the technology right wasn’t enough. We evolved our approach to focus on understanding and engaging our customers, supporting them through the change and to realise the benefits of the service.”

Lucy Baker,
Consumer All-IP Director, BT

Case study:

Chip and PIN (2003 onwards)

Changing everyday behaviour at national scale

The introduction of Chip and PIN in the early 2000s replaced signature verification with PIN entry at the point of sale. It was a technical upgrade – but more importantly, a behavioural one rolled out through millions of everyday transactions.

People had to remember a number and enter it publicly. Retailers had to upgrade terminals. Banks had to replace cards. Fraud liability rules were adjusted to incentivise adoption. There was no single switch-on date. Instead, rollout was phased from 2003 onwards through the normal replacement cycle of cards and terminals.¹¹⁷

For consumers, the change brought tangible benefits. PIN verification was faster and more reliable than manual signature checks, reducing queues and eliminating awkward comparisons at the till.

More importantly, it materially reduced counterfeit and lost-and-stolen card fraud. As fraud levels fell, confidence in card payments rose. This encouraged greater use of electronic payments, reducing the need to carry cash and making everyday spending simpler and safer.

By early 2005, two-thirds of consumers had used Chip and PIN. By late 2005, PIN verification was standard for most transactions. What initially felt unfamiliar quickly became routine.¹¹⁸

Crucially, adoption was tolerant and forgiving. Signatures remained available for a period. “Chip-and-signature” cards were offered for those unable to use a PIN. Incorrect PIN entries did not result in immediate lockout. Retail staff played a vital role in prompting and reassuring customers. Everyday transactions became low-risk learning moments rather than points of exclusion.

Fraud fell materially after introduction, reinforcing public and political confidence in the change^{119,120}. The upgraded terminal infrastructure later enabled contactless payments and mobile wallets, accelerating further innovation in the UK payments market.¹²¹

Why did it work?

Coordinated industry-led governance, phased implementation and tolerance for mistakes allowed deeply embedded behaviour to change without destabilising trust – and delivered visible benefits that made the new system feel like an upgrade rather than an imposition.



Tackling evolving risks: fraud and scams

Fraud is now the UK's largest crime type and a major driver of lost trust. Losses across banking and payments recently exceeded £1bn in a year¹²² and the emotional damage often goes on long after a consumer has been reimbursed financially. Scams are increasingly cross-sector and enabled by new technologies (including synthetic media), so piecemeal responses won't scale. Once again, we are seeing that the risks are at their most intense and challenging during periods of transition, when the pace of change is outstripping a concerted effort to develop the necessary safeguards.









What stops scammers:

- sector-wide intelligence sharing (so telecoms, platforms and banks can block fraud ecosystems, not just end incidents)
- network-level protections (call-blocking, detection at scale)
- visible, fast human recovery routes for victims
- industry-backed reimbursement regimes that reduce the long-term harm to individuals

Example: Stop Scams UK is a cross-sector organisation which brings together law enforcement, telcos and online platforms to disrupt fraud supply chains (by sharing blocked SIM intelligence to identify linked fraudulent accounts). Early signs suggest that coordinated action raises the cost and lowers the reward for criminals.

Initiatives like these will become increasingly important as digital participation rises.

Managing transitions successfully - a practical checklist

- 1 Start by understanding with how people actually use the service to identify challenges at the outset. 
- 2 Be explicit about why change is needed, explaining the benefits and costs of inaction. 
- 3 Before withdrawing or changing a channel, test alternatives and make sure they work for people. 
- 4 Design easy and dignified support as part of the service - with assisted pathways, delegation tools and staff discretion at the point of delivery. 
- 5 Phase, test and learn - pausing or pivoting where necessary. 
- 6 Align operators, regulators, local authorities and civil society behind a common goal - and make inclusion financially sustainable. 

The components of a successful digital society



Chapter summary

Digital transformation does not succeed through technology alone. Evidence from overseas and from earlier UK examples shows that successful digital transitions rely on a small set of shared foundations, including reliable access, usable design, practical support, careful sequencing and clear accountability.

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The risk of drift

Throughout this report we have seen how well-managed change can reduce friction, lower costs, widen participation and improve resilience. We have also seen that when change accumulates organically it can create complexity, undermine people’s confidence and shift pressure onto citizens and frontline services. For these reasons, we cannot afford to see digital inclusion as a marginal issue, nor about a small group of people “catching up”.

Allowing change simply to evolve can seem like the neutral option, but earlier transitions show us that technology or market-led innovation will only get us so far. It becomes transformational only when standards, regulation, policies adapt – and when consumer confidence leads to widespread adoption. Adoption is key to successful digital transition, and adoption relies on consumer confidence.

Without confidence, legacy systems will have to be maintained indefinitely, investment will be diluted or delayed, and the benefits of technology will diminish.

Even if nobody is making proactive decisions about digital transition as a whole, in reality, decisions *are* being made. We are choosing to spread investment

more thinly, to design services to many different standards and to withdraw older channels on a piecemeal basis. We are also doing what can seem like the kindest option; enabling people to stick with older channels they know and trust rather than working hard to make new channels work for them. This simply leaves many people (often the poorest and most vulnerable) on older, degrading services which get less investment and can offer an inferior experience. This all costs more and delivers worse outcomes for citizens as well as constraining productivity, innovation and growth.

Who we are and why this matters

The Connection Project brings together some of the largest organisations in the UK, supported by leading charities. The breadth of this coalition is rare. It reflects a shared recognition that these challenges are real and that no sector can tackle them in isolation. Collectively, these sectors see the effects of a digital society on citizens every day, and are committed to achieving a digital society which works for everyone.

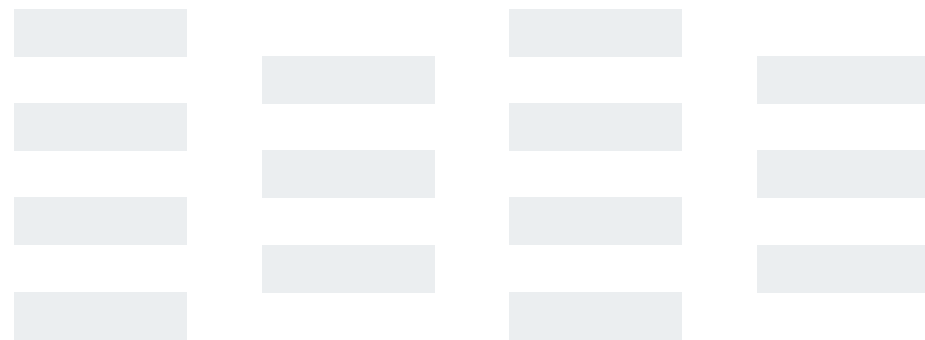
We are not seeking to take on the responsibilities of the governments or regulators. Our role is different. Because citizens experience life in the round, not sector by sector, we believe there is value in examining digital transition at system level, across industries and services, rather than through isolated lenses. This is partly about orchestration, but it is also about creating the conditions in which essential services remain reliable, markets remain competitive and citizens retain confidence to participate in a digital economy.

This first report has set out the diagnosis. Our next step is to define the foundations which appear necessary if the UK is to move deliberately toward a digital society that works for everyone. Some of these foundations, such as accountability and consumer protection, sit with government and regulators. Others sit with industry; design choices, sequencing, support and investment decisions. And some, such as standards, require joint ownership across sectors. Being clear about where these responsibilities lie can ensure that all our efforts combine to create the conditions for digital adoption, rather than assuming the responsibility lies elsewhere.

What needs to be in place

If we want to actively choose a positive digital future for the UK, we need to question whether we have the foundations in place to make sure the transition happens fairly and effectively.

Our research has shown that successful transitions rely on a small but powerful set of conditions. These are not prescriptions or policy proposals; they are simply characteristics that have appeared consistently where digital transition has been trusted and successful:



1

Reliable and affordable digital access – with connectivity considered an essential service

Everyone can depend on and afford suitable devices and fit-for-purpose connectivity (broadband and mobile) at home, at work and on the move.

2

Usable design

Essential services are simple, accessible and safe by design – including identification and authentication features that work for the people who need to use them and those who support them – with appropriate non-digital routes where necessary.

3

Practical support

People can recover when things go wrong, get help easily and delegate safely without being penalised for honest mistakes.

4

Careful sequencing

Services change only when replacements demonstrably work end-to-end, and transitions are managed with clear communication, realistic timetables and visible support.

5

Accountability and assurance

There is clear ownership for managing major change, transparent standards and metrics, and redress when systems fail.

How and why we want to engage with you

We are seeking to find out the extent to which these characteristics are present in the UK in people’s everyday experiences. We want to understand where friction is most acute, where foundations are weakest and where trade-offs are unavoidable. We can then determine whether our foundations are sufficient or whether they fall short – and if so, what action we would need to take to improve them.

We are keen to hear from people who use services, carers and advisers, frontline staff, community organisations, regulators, policymakers and businesses who see both the risks and the opportunities in digital transition.

We would welcome your views on:

- Are these the right components? What is missing?

- Which of these conditions matter most in everyday life?

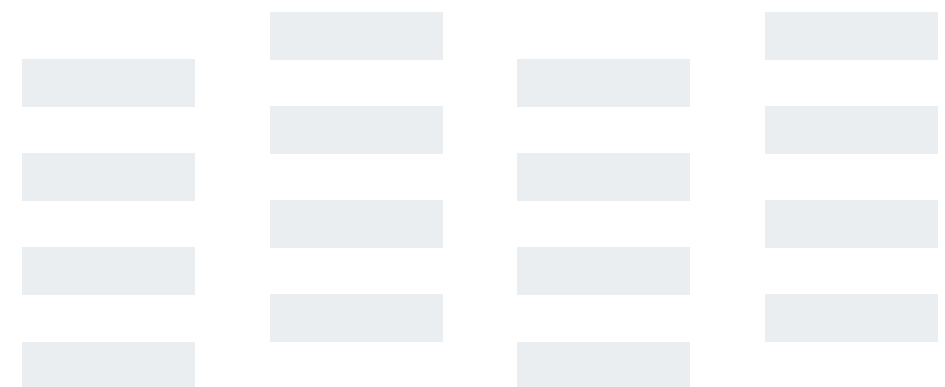
- Where do they already work well – and where do they fail?

- What makes change feel acceptable rather than imposed?

- When is it reasonable to retire older channels?

- What support should always exist where digital systems are essential?

- What would increase your confidence that essential services will continue to work for you?

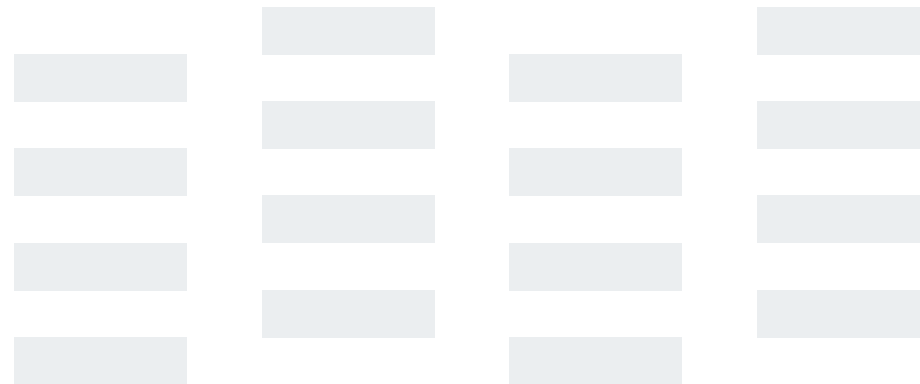


What comes next

Having listened to your views and taken the time to understand different perspectives, we will publish a second report in the autumn setting out recommendations and a practical roadmap.

You can share your views and experiences by Tuesday 30 June through our website: www.connectionproject.co.uk or by post to: The Connection Project, 3-7 Temple Chambers, Temple Avenue, London EC4Y 0DA. Please let us know if you are happy to be quoted, or you would prefer your comments to be kept confidential.

Digital change is already reshaping the UK. If we do not shape it deliberately, it will shape our economy, institutions and communities by default. We want to agree how we can make digital work for everyone. We look forward to hearing from you.



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