

The Mobile Connectivity ROI Index 2025

How better indoor mobile coverage
could boost the UK economy



Just five minutes of poor current connectivity a day reduces annual productive time by

1%

87%

of UK organisations say poor current connectivity causes daily disruptions at their sites

Poor current connectivity costs the UK

£100

BILLION PER YEAR

Contents

EXECUTIVE SUMMARY

Let us help you make the case for better connectivity	4
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KEY FINDINGS

5 key indoor mobile connectivity trends	6
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THEME ONE	
Poor current connectivity is costing the UK £billions	7
THEME TWO	
Better indoor mobile coverage would bring immediate payback and high ROI	8
THEME THREE	
There are longer-term benefits as well as immediate gains	9
THEME FOUR	
CEOs are the biggest advocates	12
THEME FIVE	
Wales and the South East could benefit most	13

CONCLUSION

Next steps	14
-------------------	-----------

APPENDIX

Methodology	17
--------------------	-----------

Let us help you make the case for better connectivity

By Simon Frumkin, CEO of Freshwave



Have you been more than a metre away from your mobile phone today?

I haven't. And most business leaders would say the same.

As the fastest growing neutral host provider of connectivity infrastructure-as-a-service, we've had a front row seat to the changing market demand for assured, dedicated mobile connectivity.

As we turn five years old, I'm proud that we've grown by more than 30% per year. And I'm increasingly convinced it's indicative of the rapidly changing market demand for mobile signal wherever it's needed most.

This Mobile Connectivity Return On Investment (ROI) Index is a snapshot of business leaders' perspectives on that change across different industries and sectors.

It's our privilege to partner with the UK's mobile network operators (MNOs). They play a pivotal role in prioritising efforts to improve the UK's global mobile connectivity rankings and enhance our collective experience of being connected.

And their significant investments in 5G networks aim to deliver faster speeds, improved reliability and transformative benefits that underpin the UK's digital future.

But MNOs understandably focus on maximising the impact of new infrastructure by deploying it in locations where it can serve the largest number of customers, usually outdoors.

This leaves connectivity challenges inside buildings, which – because of modern construction materials such as thick insulated walls and energy-efficient glazing – are mainly mobile signal dead zones.

For many of the UK's critical sectors, their offices, hospitals, warehouses, business parks, train stations, shopping centres and stadiums simply don't have the mobile signal they need. In 2020, we published research showing why enterprise connectivity matters and how the co-working revolution was accelerating the need for indoor mobile connectivity.

Five years on, those insights seem obvious.

Instead, our customers need help articulating exactly what they stand to gain from investing in dedicated mobile connectivity. Both in year one of their investment and in years to come.

To support that need, we surveyed 900 leaders from UK organisations across multiple industries – all with over 100 employees and more than £50 million in budget or revenue.

Whether you're a business leader or IT director building your mobile connectivity business case, use this report to sharpen it with topical insight from your peers.



*We surveyed **900 senior executives** from medium and large organisations across the UK's private and public sectors. The industries represented include transport and logistics, professional and financial services, healthcare, retail, manufacturing, hospitality, stadiums and leisure, property development, law, and government.*

5 key indoor mobile connectivity trends

When 900 business leaders shared their views on improving indoor mobile connectivity, five core themes stood out.

1

Poor current connectivity is costing the UK £billions

2

Better indoor mobile coverage would bring immediate payback

3

Investment returns increase over time as organisations progress in their digitalisation journey

4

CEOs are the biggest advocates

5

Wales, London and the South East would benefit most

Poor current connectivity is costing the UK £billions

Connectivity issues aren't just frustrating
– they have a significant business impact.

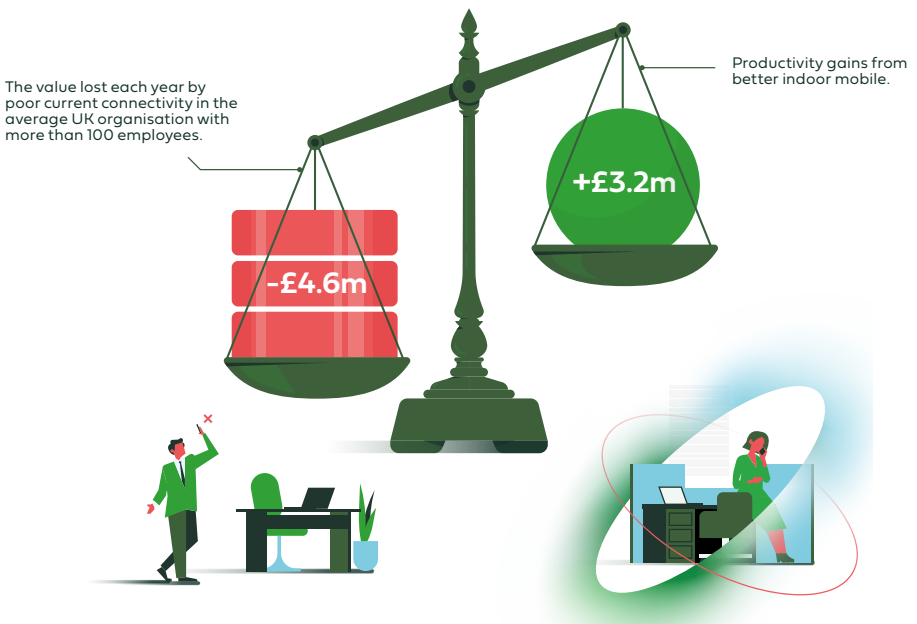
We asked organisation leaders and senior IT decision-makers to evaluate the impact of current connectivity issues on their operations, then estimate how much of this impact could be mitigated with improved mobile connectivity.

By combining their views, we were able to calculate the average productivity loss and potential gains for organisations of different sizes and industries in each UK region.

We then extrapolated these averages to represent all relevant UK organisations meeting the criteria.

And everything pointed towards one stark conclusion:

Poor current connectivity costs the UK £100 billion per year.



Better indoor mobile coverage would bring immediate payback and high ROI

The average organisation could see £millions in added value, with £billions added to the wider economy.

In the previous section we talked about the existing productivity loss from poor current connectivity.

The business and IT leaders we surveyed believe better indoor mobile coverage could reduce that impact by as much as 70%. That would equate to £70 billion per year across the UK economy.

But let's not forget the benefit to individual organisations.

The leaders' views were:

That an average UK organisation with more than 100 employees loses £4.6 million in value each year thanks to productivity losses from poor current connectivity.

But they also believed that by investing in better indoor mobile connectivity, those organisations could see a possible productivity gain of £3.2 million per year. Recovering 70% of their productivity losses.

Which sectors have the most to gain?

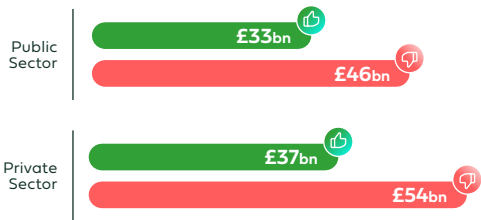
As is often the case with technological progress, things differ somewhat from sector to sector.

Government and public sector organisations, along with professional and financial services firms, believe that they suffer the most in real terms from current connectivity issues, losing out on value equivalent to £46 billion and £24 billion respectively.

This is because:

- The public sector relies on connectivity to manage and access vast amounts of data and highly secure systems that must be coordinated across various departments and geographic locations
- The financial and professional services sector relies heavily on real-time data to make decisions, manage transactions and analyse markets. Due to its high-value operations, even minor disruptions in connectivity can result in significant losses.

But these current challenges also mean these sectors have the most to gain, with perceived potential productivity gains of £33 billion and £17 billion respectively.



- Annual value productivity gain from better indoor mobile connectivity.
- Annual value lost due to poor current connectivity.

There are longer-term benefits as well as immediate gains

The benefits of improving indoor mobile connectivity are twofold, bringing both immediate and long-term impacts.

As digital transformation accelerates across the UK's public and private sectors, the role of indoor mobile connectivity is evolving beyond a backup or secondary network to Wi-Fi.

It is increasingly enabling the intelligent applications that are reshaping industries. Unlocking new ways of working and delivering new longer-term benefits.

This is because many of the AI, genAI, robotics and IoT technologies that businesses are looking to deploy today require the ultra-low latency, mobility and massive device density that 5G offers.

What are the immediate gains?

We asked our respondents about the organisational outcomes they felt would be most improved by enhanced 4G/5G coverage at their sites.

The two most-cited outcomes were:



The first point highlights the crucial role of seamless mobile access in enabling employees to work efficiently, collaborate effectively and use digital tools without interruption, ultimately enhancing overall productivity.

The second point demonstrates the critical importance of reliable indoor mobile network access for supporting revenue growth, cost optimisation and long-term business success.

The other two most-cited outcomes were:



There were some interesting differences between each sector, with respondents in some sectors believing customer satisfaction would be most enhanced by dedicated mobile connectivity.

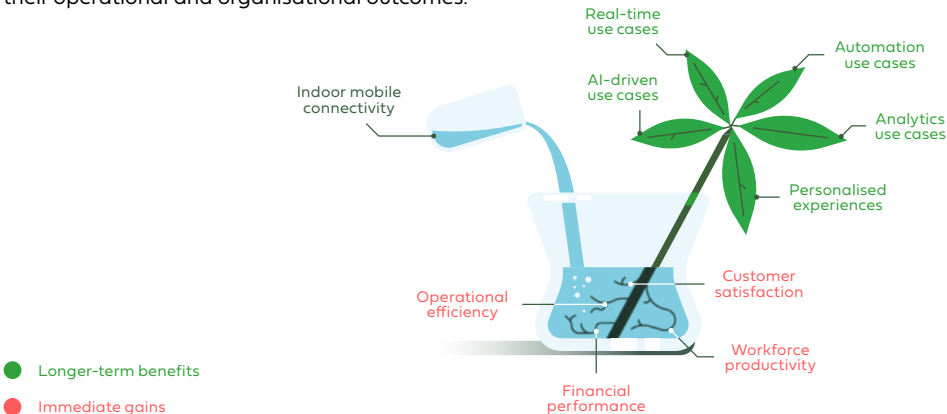
What are the longer-term benefits?

Business and IT leaders also see mobile connectivity as a key enabler of digital transformation activities, especially around accessing real-time insights.

A key challenge highlighted by the respondents is the inability of current connectivity solutions to enable organisations to monitor their sites – and the people and assets within them – in real time.

Real-time data on the movement of people and assets is becoming vital for those organisations undergoing digital transformation as it underpins analytics, automation and AI applications that drive efficiency and innovation. It also significantly enhances the ability to support critical communication needs, better ensuring people’s safety and the possible emergency-situation responsiveness in any location.

With adequate connectivity to support these applications, organisations can similarly unlock significant productivity gains by equipping their workforce with smarter, more advanced tools. From business management to heating, ventilation and air conditioning systems - the more digitally connected everyone’s buildings, the better their operational and organisational outcomes.



**“Better indoor mobile would
help employees to stay
connected to trading apps
when they are away from
their desks.”**

– Senior IT decision maker, Private Sector, London



CEOs are the biggest advocates

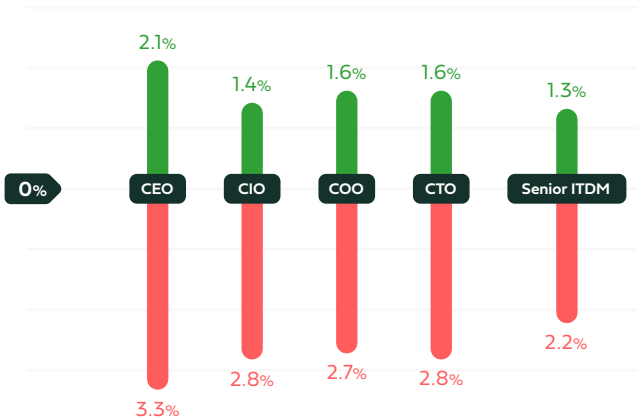
The C-suite are most energised about the potential benefits of better indoor mobile connectivity.

While senior IT decision-makers often (rightly) focus on ensuring that current applications and systems are well-supported, executives in the C-suite are more likely to view improved indoor mobile connectivity as a strategic enabler of long-term growth and digital transformation.

Of everyone surveyed, CEOs felt there was the greatest potential for productivity gains from better indoor mobile coverage across their sites, estimating it at 2.1% of their annual revenue or budget.

They also recognised a greater negative impact from poor current connectivity than any other job role we surveyed. Senior IT decision-makers perceived less value created by better indoor mobile connectivity compared to those in the C-suite, but they still estimated a 1.3% uplift in productivity.

However, it's helpful for them to know the breadth of support for the mobile connectivity business case in the C-suite.



- Average productivity gain from better indoor mobile connectivity.
- Average value lost to poor current connectivity.

Wales and the South East could benefit most

Organisations in these two regions have the potential to unlock even more value.

By monetary value, London stands to gain the most from improved indoor mobile connectivity.

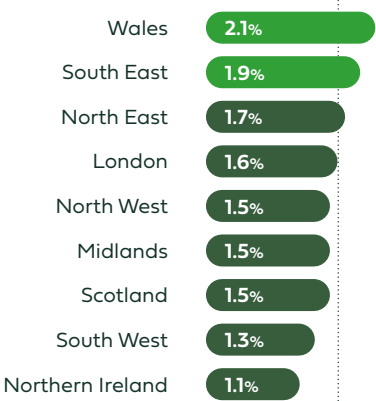
The story shifts, however, when we consider the overall impact that business and IT leaders believe it could have on their organisations.

On average, large organisations across the UK estimate that better indoor mobile connectivity could unlock value equivalent to **1.6% of their annual revenue or budget**.

When we look at specific parts of the country, we can see that this figure is even higher in some regions:

2.1% in Wales
1.9% in the South East

Annual productivity uplift created by better mobile connectivity (£billions)



Next steps

A huge opportunity for public and private sector organisations across the UK.

66% of organisations expect their overall budget for connectivity to grow in the next two years, putting the majority of leaders in a strong position to act on the insights in this report.

In fact, across all sectors, business and IT leaders are increasing their propensity to spend on indoor mobile connectivity as they recognise its twofold benefits:

1. **Optimising the current operational model**
2. **Enabling transformative technologies**

That means they – and others like them – have an enormous and exciting opportunity to embrace the future of connectivity, helping the UK thrive for decades to come.

Chronic underinvestment in digital infrastructure in the UK has led to a national productivity slowdown, leaving our productivity lower than countries like France, Germany and the US.

And with growth now at the centre of the UK government's plans, boosting productivity is one of the keys to making those plans a reality.

This is your chance to be part of an exciting digital transformation, one that will strengthen the economy, provide more jobs and benefit individual organisations in the short and longer term.



Based on the insights in this report, those that move quickly to invest in assured indoor mobile connectivity could improve everything from productivity to financial performance, operational efficiency, customer satisfaction and more.

But the time for immediate payback is now.

And the question is: will your organisation be part of this high ROI, mobile connectivity-based future?

Of course, the specific immediate and longer-term gains for each sector vary.

If you're interested in a particular sector perspective, see below for how to register your interest.

Please note: certain sector specific Index reports are being shared at key sector events and calendar moments throughout 2025. So, when you register your interest, you'll be signed up to receive the insights as they are launched to that sector.

Meanwhile, you will also immediately receive a copy of this main report.

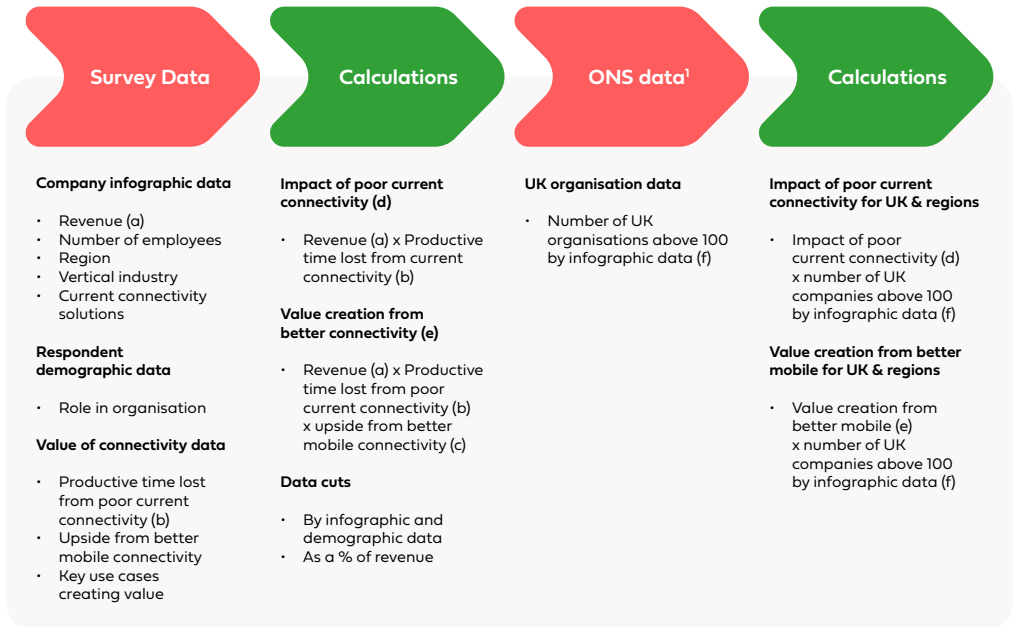
“We are using fairly old systems which are hard to use and cause **connectivity issues every day”**

– COO, Public Sector, North West



Methodology

The survey we ran posed several questions for organisations across the UK from nine different sectors (100 organisations with greater than 100 employees) including the impact of existing connectivity issues on their business. We also asked them how much of this impact could be mitigated through improved mobile connectivity. This enabled us to calculate the average loss and mitigation value for businesses of different sizes within each sector across different regions of the UK. We then used these average values and applied them to all relevant businesses across the UK – those with greater than 100 employees, within our target vertical industries, within each region. This enabled us to calculate the impact on specific industries, specific company sizes, and specific regions.



Definitions

Current connectivity

Network system within an organisation, consisting of predominantly fixed connectivity.

Large organisations

Organisations with more than 100 employees.

¹<https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation>

By investing in better indoor mobile connectivity, an average UK organisation with more than 100 employees could see a productivity gain of **£3.2 million per year.**



Ready to talk about improving your indoor mobile connectivity?

Let's start the immediate payback
and high ROI conversation.

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