

Communications Consumer Panel

Migration to VoIP: listening to the needs of landline consumers



Quantitative Research Report into the needs of
UK residential landline telephony consumers

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Foreword

The role of the Communications Consumer Panel, as the statutory consumer panel for the communications sector, is to represent consumers in this sector - particularly those whose voices are otherwise less likely to be heard by policymakers and industry. That includes users of landline telephony, whether as a residential customer or a micro business.

By 2025 BT intends to replace the Public Switched Telephone Network (PSTN) with Voice over Internet Protocol (VOIP), which uses broadband to provide a digital connection. Other landline providers will follow similar timescales. The change in technology will have implications for a range of consumers; in particular those who are reliant on their landline and those who use their landline services for other services such as house alarms or care alarms.

We believe that migration to VoIP needs to be handled carefully to protect the safety of consumers in the event of power cuts, including people living in areas where they cannot rely on a strong, reliable mobile signal and those who use additional telephony services such as a telecare alarms or remote health monitoring.

Consequently, we believe that raising the overall awareness of consumers and micro businesses is vital. This matters so that consumers can share with their communications provider any additional service requirements that they may have had no reason to mention before, so that their provider can best assist them - and to arm them with clear information to protect them from falling foul of scams.

We remain convinced that there needs to be a wide-ranging communications campaign around this industry-led change. We have welcomed industry's engagement on this issue and look forward to continued collaborative working to influence change, along with the National Stakeholder and Consumer Advocacy Hubs, Ofcom, DCMS and devolved government stakeholders.

1. Research Objectives and Methodology

In order to inform the discussion of the changeover to VoIP, in 2022, the CCP commissioned an extensive quantitative research survey of 4,612 consumers with a landline around the UK. The research was repeated in 2023 with an increased sample size (6,117), minor questionnaire additions and the same objectives:

- What do people need to know to prepare for the switchover to digital telephony?
- Current knowledge and awareness of the switchover
- How consumers can best be informed, by whom, and what content is required
- How reliant consumers are on their landline phone - for example, what they would do in an emergency if there was a power cut and they had no access to a landline connection?
- Are there particular concerns, requirements, or communication preferences amongst consumers who may be put in a vulnerable position if their landline service failed?

Of the 6,117 quantitative interviews conducted in the latest wave, 5,602 were online and 515 were via telephone. A nationally representative sample of UK adults (18yrs+) was recruited from an online omnibus database.

Sample profile (Base: all respondents (6117); 'Prefer to answer' not shown):

- Gender: 50% female; 50% male.
- Rurality: Rural 39%; Urban 60%.
- Ethnicity: Ethnic minorities 8% (comprising Black African, Black Caribbean, Chinese, Indian, Mixed ethnicity, Pakistani); White 91%.

Data was weighted to the known profile of the UK using the same weights as in 2022, based on age, gender, government office region, social grade, ethnicity, urban/rural, literacy, and condition/disability.

The research was conducted by an independent market research agency, Yonder Ltd, who had also conducted the previous wave of research in 2022. All interviews were held in March 2023.

The sample was significantly upweighted from 2022 in order to deliver larger sample sizes across the devolved nations of the UK and a larger representation of people who self-identified in Yonder's recruitment questionnaire as having a 'longstanding physical or mental condition or disability'.

The Panel's view on making communications services inclusive

While the Communications Consumer Panel does not assume that all disabled communications consumers have additional access requirements that

communications providers may need to take into account, we are keen to ensure that that all communications consumers are able to use communications services safely, to enhance their daily lives. Where rules exist to protect safe, affordable and reliable access to communications services for people who have additional access requirements, we encourage Ofcom to enforce those rules and to strengthen them where relevant. We believe this research highlights some areas of focus for Ofcom, as well as industry (networks and communications providers) and others, such as UK and devolved governments and telecare providers.

2. Executive Summary

Use of landlines

- Although since 2022, there has been a drop in those who say they **use their landline for calls at home** (59% in 2023 compared with 62% in 2022), landline usage is much higher than average in some subgroups, especially those aged 65+ (74%), and those with low digital literacy (67%).
- Around a third (36%) **consider the landline important**. Some who say they use the landline less are still relatively likely to say the landline is important - for example minority ethnicities (43%) and 18-34 year-olds (34%). The key thing to note is that the question asked about the importance of the landline for receiving as well as making calls.
- Just under one in ten (8%) say they have a **device connected to their landline**; this figure is higher among those with a condition or disability (12%).

Emergency Situations

- Nearly two-thirds (64%) say they have **experienced a power cut** in the last two years. Around one in seven (13%) say they called someone during a recent a power cut, and this figure is much higher among global majority ethnicities (29%).
- Two-thirds (65%) say they would **expect to use their mobile for home emergency calls**, but some groups - particularly those aged 65+ (51%), and those in rural areas (47%) - are much more likely than average to say landline.
- Over half (57%) of those who prefer landline for emergency calls say it's because **landlines are easier to use**. Some are concerned about cost - for example, one in ten (9%) say mobile calls are **too expensive**, when asked why they'd use a landline for an emergency call.
- Around one in seven (14%) say their mobile signal isn't strong enough **indoors** - and this figure is much higher in Wales (27%), and in rural areas (25%).
- In a home emergency, half (49%) say they would **call emergency services**; but this has decreased (from 54% in 2022), with a rise in those saying they would call their **partner or a family member** (from 35% to 39%).

VOIP Switchover

- There has been an increase in those saying they've **switched to VOIP** (from 3% to 5%). However, around half of those who've switched (52%) did not say that they were **asked key questions** such as whether they had any devices attached to their landline before they switched.
- There's been a significant increase in those who've **heard about the VOIP switchover** (from 48% to 51%). This increase is driven mainly by people who heard about it from their **landline provider** (from 20% to 26%).
- Most (93%) would expect their **provider** to inform them about **changes to telephone services**; but there's been a noticeable increase in those who expect to hear from **family or friends** (from 8% to 10%).

- The key things people would like to know about the VOIP switchover are: will it **affect my bills** (59%), and can I keep my **existing number** (50%)?
- Two-thirds (67%) of those not already switched to VOIP say they would like to be **informed about the switchover by email**. Preference varies noticeably by sub-group: for example whilst one in ten (11%) overall would like to be informed by text, this is much higher amongst global majority ethnicities (22%).

3. Main Findings

Use of landlines

People's reported usage of landline has decreased, but it's still widely used in some subgroups, especially older people, and people with low digital literacy.

This year, 90% of respondents said they would use a mobile phone to make calls at home, while 59% said they would use their landline, a drop of 3% compared to last year.

The following are the top four audiences who still use their landline to make calls at home:

People aged 65 years or older	74% (vs 46% of 18-34 year olds; 58% 55-64s)
Respondent with low digital literacy	67% (vs. 56% for digitally literate)
Respondents with any condition or disability (condition)	64% (vs 58% for those who had not stated that they had a disability or health condition)
Respondents living in a rural location	63% (vs. 57% urban dwellers)

Note the step change in landline use between 55-64 year olds and those aged 65 years and over (58% rising to 74%)

Continuing importance of the landline

Although only 32% of respondents stated that their landline was their preferred device for making calls at home, this rose to just over half of over 65s (52%). Again, this is significantly higher than the next oldest age cohort, with 37% of 55-64 year olds. Interestingly, when asked how important their landline was, there remains a strong sense that it is a necessary device, with 36% of the sample regarding their landline as important and levels not dropping below 26% even amongst younger users (35-54yrs) and rising to 46% for those over 65yrs and 50% for those with low digital literacy. Strikingly, 34% of 18-34yr olds also regarded their landline as important.

Devices connected to a landline

8% of the sample have a device connected to their landline, with three quarters of these people regarding their landline as very important. Typically the connected device was medical in nature, for example a telecare alarm.

This perceived importance of the landline rises to over 80% for those aged over 55 and those living in rural areas. 12% of respondents who reported that they had a health condition or disability reported having a device connected to their landline.

Type of landline owned

The majority of those in the sample who owned a landline had a cordless device (64%), although that number has dropped significantly (by 6%) in the last year. There may be a number of reasons driving this, for example cordless phone usage may be a migratory step towards not using a landline at all.

There are some significant regional variations, with the South West of England claiming the highest level of cordless usage (71% of those with a landline), vs 55% in London.

Mobile phone signal speed and strength

The vast majority of respondents say they use 4G/5G. However around 1 in 7 say their mobile signal isn't strong enough indoors - much higher in Wales (27%), Northern Ireland (20%) and rural areas across the UK (25%). This serves to highlight their increased dependence on their landline.

Emergency Situations

Nearly two thirds of the sample have recent experience of a power cut, with 12% reporting four or more in the last 12 months. 65% had experienced at least one power cut during that period.

During a power cut, over 13% of the sample said that they needed to either call for help or call to check on someone else. This was highest amongst 18-34yr olds (25%); those with lower levels of digital literacy (20%); those in London (19%) and those in Scotland (17%).

When asked to consider how they would call for help in an emergency, 34% of the sample said they would use their landline not their mobile phone. This was higher among people aged 65+ (51%), people living in rural areas (47%), Wales (45%) and disabled people/people with long term health conditions (38%).

The main reasons people would choose to use a landline were that it was easier to use (57%) especially those aged 65+ (65%) or that they did not have a good mobile signal indoors (26%) - more so amongst people living in rural areas (39%), Wales (44%), and NI (43%). Some respondents were also worried about cost, with 9% saying mobile calls are too expensive.

Emergency contacts

Interestingly, in an emergency, less than half the sample would dial 999, with 46% preferring to call their partner, family or friends, a drop of 5% from last year. In fact, 39% of respondents said they would call their partner, or a family member.

Battery back-up

Just over half the sample say they are interested in a battery back-up device. A quarter don't know if they would like one, suggesting more information would be useful.

Switched over to VOIP

There has been an increase in those saying they've switched over to VOIP already, up to 5% of the sample, an increase of two percentage points from last year. However, half of those who've switched over don't recall their communications provider asking key questions before the switchover. When asked whether their communications provider had asked them: if they had a mobile phone 37% said yes; whether they had any additional services running through their landline, 16% said yes; whether they have a battery back-up already, 7% said yes; whether they have a disability or heart condition that would make them more reliant on their landline, 6% said yes; and 4% had been asked other questions about their set-up in advance of being switched over to VOIP.

However, 52% said they had not been asked any of the questions listed here by their communications provider, before their landline service was switched over to VOIP.

Consumer awareness of VOIP switchover

There has also been a statistically significant increase in those who've heard about the switchover, with 51% now claiming awareness, an increase of three percentage points since 2022. 18-24yr olds remain the group least likely to claim awareness (61% stating that they were not aware).

Awareness was driven mainly by hearing from respondents' landline provider.

Consumer expectations around VOIP Switchover communications

Most respondents said they would expect their provider to inform them about changes such as this (93%); 34% expected the Government to inform them and 18% mentioned Ofcom, although as the question was asked from a prompted list, this probably overstates spontaneous expectations that Ofcom would inform them.

There has been a noticeable increase in those who would expect to hear from family/friends, up to 10% of the sample and 16% of over 65s and 15% of Minority Ethnicities. This could be driven by multiple factors such as digital exclusion and/or English as a second language.

Consumers' preferred communications channels

Nearly two thirds (67%) would prefer to be sent an email to inform them about the change to VOIP, with 54% a letter. A preference for a letter over digital forms of communication is higher among those living in rural areas (58%) and those with low digital literacy (58%). Over a quarter of the sample would prefer to see TV advertising about VOIP and one in five would prefer to receive a leaflet.

Key consumer concerns and questions regarding VOIP Switchover

When thinking about the VOIP switchover, the over-riding questions/concerns relate to the potential disruptive impact that it may have for people.

Key questions when thinking about the VOIP switchover are: 'will it affect my bills?' (59%), 'can I keep my existing number?' (50%). There are also concerns over

VOIP reliability (38%); concerns that it will necessitate buying a new phone (36%) and fears that a VOIP phone might not work in a power cut (35%).

4. The Communications Consumer Panel's Recommendations

It is approximately two years until the planned VOIP switchover is implemented.

This research has found that whilst 59% of the sample are using a landline, and 36% consider their landline to be important, 49% still remain unaware of the switchover. This presents a considerable and urgent communications challenge and one that it would seem landline providers are best placed to lead on.

In the last year, awareness of the switchover as a result of communications from a landline operator rose from 20% to 26% of the sample. This would indicate that communications from operators are beginning to have an impact on awareness. When asked, the overwhelming majority of respondents (93%) expected to be informed of any change by their landline operator.

Any communications campaign should focus on five key target groups who have both high dependence upon their landline and current low levels of awareness of the switchover:

- People who are 65yrs and older
- People with low levels of digital literacy
- People with physical or mental conditions or disabilities
- People living in rural locations
- People with an additional device (such as a telecare alarm) connected to their phone line (note, operators may not currently know which of their customers have additional devices)

There is an expectation by respondents that any communications around the switchover would be multi-channel, using email, letters, leaflets and TV advertising. We believe that a multi-channel, UK-wide approach would offer additional protection to those most at risk of harm, by ensuring that friends and family members across the country are aware and can assist them where necessary.

Given the scale of the challenge, it would seem sensible for landline providers to partner with charities, local councils and other groups that regularly interact with the groups identified above (for example disability charities may have greater cut-through than a landline operator when messaging people with physical or mental conditions or disabilities).

It would also be helpful for any communications to encourage people to raise awareness amongst their family and friends who do depend on their landline.

Based on this research, there remains considerable uncertainty as to anything that customers would need to do in preparation.

Key questions that would need to be addressed, based on this research, include:

- Will the switchover have an impact on my monthly bills?
- Will I need to buy new equipment because of this change?
- Is it possible to retain my existing phone number?

We are highly concerned that landline operators switching customers to VOIP are not consistently asking customers key questions prior to switching (for example if they have any other devices attached to their landline) and moving forward, it will be important for communications providers to ensure they fully understand the customers' landline needs before switching them to VOIP and to arrange support for them after switchover where needed.

As a result - our [previous recommendations](#) still apply:

In readiness for the switchover, we have urged communications providers to:

- Get to know customers' additional access requirements, so that their customers know they will be supported through the switchover and won't have additional services - such as telecare - cut-off. To enable this, providers should promote widely any additional support to customers with additional access requirements. Communications Providers should already be used to taking advice from Ofcom's Treating Vulnerable Customers Fairly guide.
- Take responsibility for informing customers (including those who are not online) of the changeover months in advance to ensure there are no unwelcome surprises and communicate more than once so that consumers cannot miss this information.
- Train staff to explain to customers simply why the change is happening and what benefits they will receive from it, as well as any precautions they need to take, using consistent language across the sector.
- Collect feedback from customers who have been switched over to VoIP and share learnings with other CPs to lessen potential for detrimental impacts on consumers, particularly those with unusual or complex set-ups.
- Display clear information on their website to enable current and potential customers to get in touch with queries related to the switchover. Replicate that information offline, for people without access to the website, keeping consumer groups updated.
- Ensure that customers understand what they can expect from CPs in terms of the provision of new routers and other equipment, and what they will be required to action themselves.
- Use relevant branding and signposting to ensure consistency and protect consumers from scams.
- Provide access to a database of VoIP-compatible products online and via a helpline to allow customers to check whether their equipment is compatible before the switchover happens.
- Provide information about requirements in relation to extension sockets, including information about options for wireless handsets and the costs and

processes for re-wiring. Make customers in financially vulnerable situations aware of any support available to them.

We recognise the role of UK and devolved governments and Ofcom and have advised that they should:

- Work with communications providers and consumer groups to agree consistent and consumer-friendly terminology around the switchover, learning from examples in other countries such as Australia's 'Check-Select-Connect' campaign.
- Make this information available through an independent agency, with government endorsement, that communications providers can signpost people to.