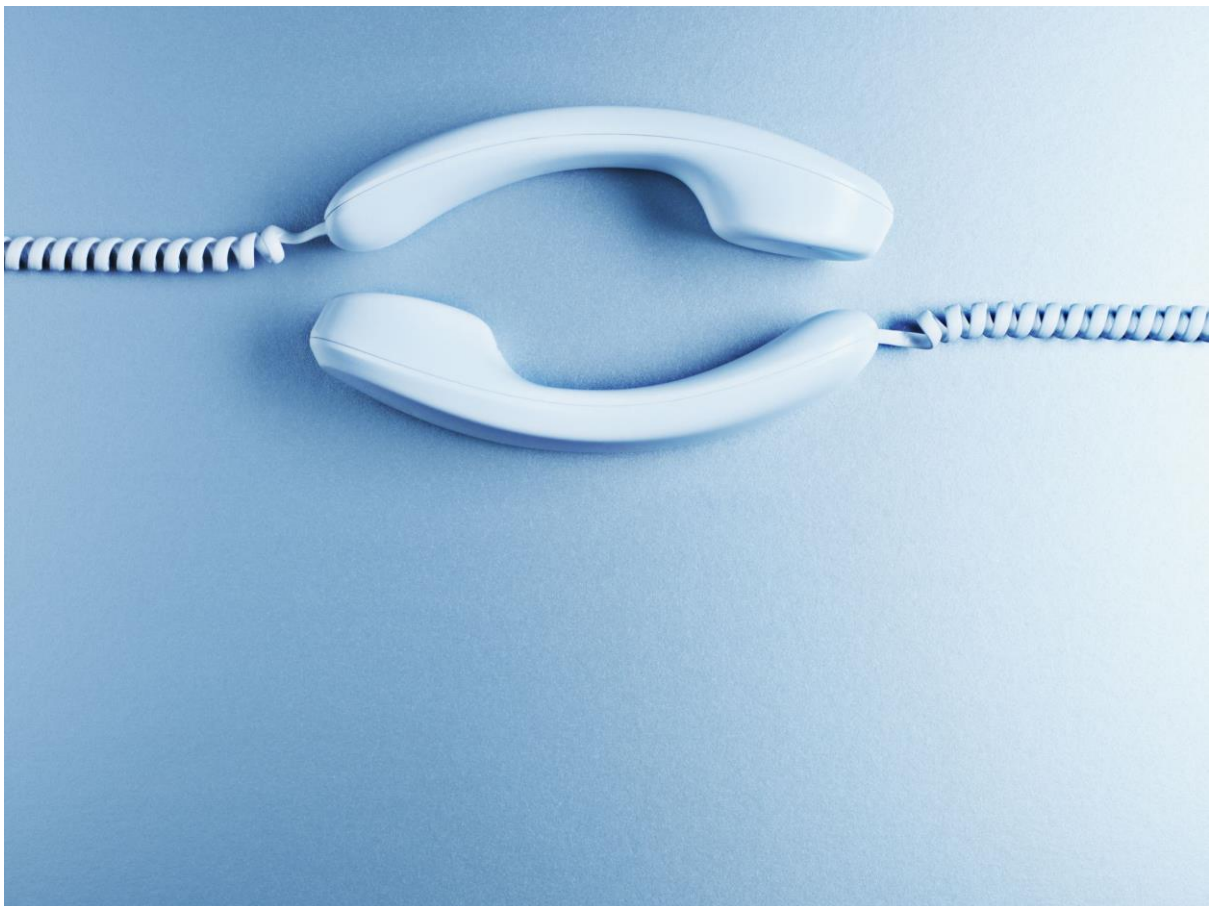




# Communications Consumer Panel

**Migration to VOIP:  
evidencing consumers' use of landlines and  
awareness of migration**



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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.

By 2025 BT intends to have completed the replacement of the Public Switched Telephone Network (PSTN) with Voice over Internet Protocol (VOIP), which uses broadband to provide a digital connection. Other landline providers are following similar timescales. We are seriously concerned that the level of consumer awareness about the implications of the migration to VOIP is still well short of what is needed for the 2025 switchover to be met without significant risk to public safety. This includes the potential scenario of people not being able to make calls in life-threatening situations during a power cut if their provider has failed to identify they are dependent on their landlines, or if people have not flagged this to their provider.

While the migration to VoIP will bring significant overall benefit for consumers, the process needs to be handled carefully to protect the safety of consumers as VoIP connected phones will not be able to make or receive calls in the event of a power cut. This raises particular safety issues for some consumers - whether they are individuals reliant on their landline for telecare etc. or communities living in more vulnerable conditions - for example in rural areas where there is not a strong mobile signal. Currently battery backups to maintain power to the VOIP telephone line in a power cut are only required to last for one hour.

In the wake of January's Storm Isha, the BBC reported that power outages affected about 53,000 homes at the height of the storm in Northern Ireland. Over 40,000 remained without power the following morning and 24 hours later, it was reported that only around half who lost supply had had their power restored. In Scotland, of the almost 89,000 customers whose power was cut, 14,800 customers remained offline the next day and in north-west England, 8,500 customers were still without power. Around 30,000 properties were without power across England, Wales and Scotland on the morning of 22<sup>nd</sup> January, according to Energy Networks Association (ENA). It is increasingly evident that storms affecting the UK are becoming stronger, more widespread and more frequent than ever before. The Belfast Telegraph reported that in just over a 10-hour window from 3:30pm to 2am, PSNI officers dealt with over 1,300 calls - approximately 600 relating to the storm. Communications are vital during dangerous situations.

Although public awareness is growing, the lack of widespread understanding about the implications of VOIP presents a considerable and urgent communications challenge and one that it would seem landline providers are best placed to lead on. This matters. If people are aware of the implications, they can share information about any additional service requirements they have with their communications provider, so that their provider can best assist them - and arm them with trustworthy information to protect them from scams.

Consumers living in the most remote and rural parts of the UK already experience multiple layers of detriment in using communication services - as highlighted in these [videos from our latest research](#). This issue is compounded by the move by mobile networks to switch off their 3G networks. With delays to the Shared Rural Network programme, although mobile providers have committed to providing broadly equivalent 4G coverage ahead of 3G switch off, it is possible that some locations without 4G could essentially become mobile data 'not spots' - at least temporarily. The existing barriers risk being magnified by these changes to infrastructure and service-design led by industry unless we are proactive now.

The UK has not had the benefit of a [national information campaign of the sort used in Australia](#) to mitigate impacts. Instead, rollout of communications is being undertaken on a regional basis in the UK. This means that a vulnerable person's support network of family/friends will not necessarily be aware of the planned changes to their connection if they are not in the same geographic area. Around a fifth (22%) of landline owners helped someone they didn't live with in relation to that person's landline telephone. In our omnibus study, 12% of people without their own landline at home assisted other people with some element of that person's landline use. Of these, 37% supported someone with telecare. This strongly suggests that communications about VOIP migration need to be aimed at the general population and not just region-specific landline owners.

Telecoms providers have now signed a Charter committing to a series of measures intended to protect vulnerable households - including retrospective checks on forcibly migrated households to check if they have telecare unbeknownst to the telecommunications provider. There is no 'silver bullet' to these issues and the commitments from industry are extremely welcome - but unfortunately they do not go far enough, fail to address the issue of consumers opting to migrate when they are not fully informed about the implications of migration and continue to omit a nationwide communications campaign, one of the simplest options available to empower consumers and their support network.

Our opinion, based on extensive consumer research, is that there remains a heightened risk to public safety, including fatalities. 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, central and devolved government stakeholders.

## Approach

Main survey: Yonder conducted a total of 6,140 interviews in 2024. All respondents were UK landline owners aged 18+.

5,640 online interviews, 28<sup>th</sup> February - 11<sup>th</sup> March.

500 CATI (telephone) interviews, 24<sup>th</sup> February - 10<sup>th</sup> March.

Omnibus: In 2024, interviews were also conducted via Yonder's UK online omnibus for a broader nationally representative view\*:

2,110 UK omnibus interviews, 1<sup>st</sup> to 3<sup>rd</sup> March. Data has been weighted to the known profile of the UK using the same weights as 2023\* (to allow for comparison), based on age, gender, government office region, social grade, ethnicity, urban/rural, and condition/disability.

## Key Findings

- While fewer homes have a landline than used to, in those that do, it is far from obsolete. Over half of landline owners (58%) use a landline to make calls at home, especially older people and disabled people/people with long term health conditions.
- While two thirds of landline owners prefer to use a mobile over a landline for calls at home, landlines still play an important role for a subsection of the population (65+ and disabled people/people with long term health conditions).
- Most landline owners (85%) had used the line within the past 12 months, particularly people living in Wales, people aged 65+, or disabled people/people with long term health conditions.
- A fifth (21%) of landline owners still have a corded phone, and 9% both corded and cordless phones. This currently enables them to make calls during a power cut.
- One in ten (11%) have a device connected to their landline. This is driven by burglar alarms, followed by telecare (4%) and medicare alarms (2%).
- Half of those with connected devices (49%) have informed their provider.
- Most landline owners also owned a mobile - but not all. Five percent (5%) of people aged 65+, 4% of people in DE households and 5% of people living alone said they did not have a mobile phone. Seven percent (7%) of people said they used a 3G mobile phone service. This is particularly relevant as mobile operators commence 3G switch-off.
- People who don't have a good mobile signal indoors (6% average) are more likely to be in Wales (12%), NI (10%), South West (10%) and generally in rural locations (8%).
- Over three quarters of landline users (77%) have now heard of VOIP switchover but not all who have heard of VOIP know what it means for them (31%).

- Around a fifth (22%) of landline owners, and 14% of people in our omnibus study helped someone they didn't live with in relation to that person's landline telephone. Approximately two fifths of these people who were being supported by others have telecare (indicated by 38% of landline owner 'supporters' and 42% of the omnibus sample of 'supporters').
- In the omnibus study, 12% of people without their own landline at home assisted other people with some element of that person's landline use. Of these, 37% supported someone with telecare. **This strongly suggests that communications about VOIP migration need to be aimed at the general population and not just landline owners.**
- Over two thirds of landline users have recent experience of a power cut (69%). Longer power cuts are a particular problem in Scotland, NI and Wales.
- Those who did call to check on someone during a recent power cut were more likely than the average (13%) to be in Scotland (18%), NI (22%) as well as aged 18-34 (26%) or from an ethnic minority group background (32%).
- Those who did call for help were more likely than the average (4%) to be aged 18-34 (14%) or from an ethnic minority group background (20%).
- Although two thirds of people (65%) prefer mobile for home emergency calls, landline preference (33%) is higher for people aged over 65 (50%), people in a rural location (36%) or disabled people/with a long term health condition (37%).
- Those who prefer landline for emergency calls are most likely to say it's because landlines are easier to use (61%) which is particularly important for older people (72%).
- In an emergency, over half say they would call emergency services (55%), followed by 35% who would call a partner/family.
- People aged over 65 are more likely than average to opt for landlines and state they are important. Among those who have devices connected to the landline, fewer than average have informed providers. Although over 65s are largely aware of the VOIP switchover, a higher proportion than average is unsure what they need to do. In an emergency, landlines are preferred.
- There is a higher proportion of people who prefer landlines in rural than urban areas, though landlines are not any more common. Power cut concerns are more common in rural areas, as is opting for the landline in an emergency.
- A substantial proportion of those who had switched over did not state that they were asked a range of relevant questions (41%). Most common was whether they had a mobile phone at 33%.

## Devices used to make phone calls at home

While fewer homes have a landline than used to, in those that do, it is far from obsolete. Over half of landline owners use a landline to make calls at home, especially older people and disabled people/people with long term health conditions.

## Preferred device to make calls at home

While two thirds of landline owners prefer to use a mobile over a landline for calls at home, landlines still play an important role for a subsection of the population (65+ and disabled people/people with long term health conditions).

## Use of landline

Most landline owners (85%) had used the line within the past 12 months, particularly people living in Wales, people aged 65+, or disabled people/people with long term health conditions.

## Existing type of phone - corded/cordless etc.

A fifth (21%) of landline owners still have a corded phone, and 9% both corded and cordless phones. This currently enables them to make calls during a power cut.

## Devices connected to the landline

One in ten (11%) have a device connected to their landline. This is driven by burglar alarms, followed by telecare/medicare alarms.

## Informed provider of connected devices

Half of those with connected devices (49%) have informed their provider.

## Mobile network

Most landline owners also owned a mobile - but not all. Five percent (5%) of people aged 65+, 4% of people in DE households and 5% of people living alone said they did not have a mobile phone. Seven percent (7%) of people said they used a 3G mobile phone service. This is particularly relevant as mobile operators commence 3G switch-off.

## Quality of mobile signal indoors

People who don't have a good mobile signal indoors are more likely to be in Wales, NI, South West and generally in rural locations.

## VOIP awareness

Over three quarters of landline users have now heard of VOIP switchover but not all who have heard of VOIP know what it means for them.

## VOIP awareness amongst people who support others

Around a fifth (22%) of landline owners, and 14% of people in our omnibus study helped someone they didn't live with in relation to that person's landline telephone. Approximately two fifths of these people who were being supported by

others have telecare (indicated by 38% of landline owner ‘supporters’ and 42% of the omnibus sample of ‘supporters’).

In the omnibus study, 12% of people without their own landline at home assisted other people with some element of that person’s landline use. Of these, 37% supported someone with telecare. **This strongly suggests that communications about VOIP migration need to be aimed at the general population and not just landline owners.**

## Power cuts - number and duration

Over two thirds of landline users have recent experience of a power cut. Longer power cuts are a particular problem in Scotland, NI and Wales.

## Calls that needed to be made during a recent power cut

Those who did **call to check on someone** during a recent power cut were more likely than the average (13%) to be in Scotland (18%)/NI (22%) as well as aged 18-34 (26%) or from an ethnic minority group background (32%).

Those who did **call for help** were more likely than the average (4%) to be aged 18-34 (14%) or from an ethnic minority group background (20%).

## Which device people would use to call in an emergency

Although two thirds of people prefer mobile for home emergency calls, landline preference is higher for people aged over 65, people in a rural location or disabled people/with a long term health condition.

## Reasons for choosing that device to use in an emergency

Those who prefer landline for emergency calls are most likely to say it’s because landlines are easier to use (61%) which is particularly important for older people (72%).

## Who would people call in an emergency

In an emergency, over half say they would call emergency services, followed by 35% who would call a partner/family.

## Older consumers’ experience

People aged over 65 are more likely than average to opt for landlines and state they are important. Among those who have devices connected to the landline, fewer than average. have informed providers.

Although over 65s are largely aware of the VOIP switchover, a higher proportion than average is unsure what they need to do. In an emergency, landlines are preferred.



## **The experience of consumers in rural locations**

There is a higher proportion of people who prefer landlines in rural than urban areas, though landlines are not any more common.

Power cut concerns are more common in rural areas, as is opting for the landline in an emergency.

## **What people want to know about migration to VOIP**

Key questions people wanted to know when thinking about VOIP migration were: will it affect my bills, can I keep my number, and will my phone work in a power cut.

Concerns/questions also varied especially by region, whether people had heard about the switchover, and by age/ethnicity.

## **Questions asked of VOIP migrators**

A substantial proportion of those who had switched over did not state that they were asked a range of relevant questions (41%). Most common was whether they had a mobile phone at 33%.