



International Roaming Report

Prepared for **Ofcom**

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1. Introduction

1.1 Background

The EU passed a Regulation in 2007, amended in 2009, to regulate the maximum amount that mobile phone operators can charge customers for international mobile roaming voice and SMS services, and to require operators to provide adequate price information. It also set a cap on consumers' mobile internet spend per month, subject to the consumer re-authorising the service. The Regulation applies throughout the EU and has also been adopted in Norway, Iceland and Liechtenstein.

The amended Regulation is due to expire in June 2012, before which the European Commission will produce a report analysing the functioning of the Regulation and making appropriate recommendations for future regulation. The Body of European Regulators for Electronic Communications (BEREC), of which Ofcom is a member, is carrying out an independent regulatory analysis to inform the Commission's review. In the event that the Commission proposes new regulation, Ofcom will be available to provide technical advice during the EU negotiations process to the UK Government and to the EU institutions as part of BEREC. Ofcom will also continue to provide consumer advice about roaming prices, for example on its website.

1.2 Objectives

In order to inform the review of the EU Roaming Regulation, and following on from similar consumer research conducted for Ofcom in 2006, Ofcom commissioned Kantar Media to perform new consumer research in Great Britain. The objective was to establish consumers' awareness and understanding of international mobile roaming charges and whether the price of roaming has an impact on their choice of UK mobile network and international roaming behaviour.

Specifically, to understand:

- The extent to which consumers take into account international roaming charges when they choose a network provider.
- How the charges influence their behaviour when in the EU/Norway/Iceland¹:
 - Extent to which they use their mobile while abroad
 - Reasons for using their mobile while abroad
 - Whether they know that there are alternatives to international mobile roaming, such as using an international SIM or local WiFi hotspot, and whether they would consider these alternatives
- The level of satisfaction with the pricing information they receive from their operator, with respect to the prices themselves and the mobile internet cut-off limit.

The research was designed to report on these factors across a range of groups of interest (such as demographics and mobile subscription).

¹ This research did not ask about travel to Liechtenstein

1.3 Key terminology

A number of derived terms are used throughout this report for simplification:

Term	Description	Definition
Personal mobile users	Consumers who own a mobile phone for personal use	Q1=1 or 3
Europe	In the context of this report, 'Europe' refers to the EU, Norway and Iceland	
Abroad	In the context of this report, travelling 'abroad' refers only to destinations within 'Europe', i.e. it excludes all other destinations	
European Travellers	Those who ever travel outside the UK, within 'Europe'	Q11=1-6
European Roamers	European Travellers who use their mobile phone either for voice calls, text messaging or mobile internet when travelling in 'Europe'	Q12=1-3

2. Key findings

Importance of roaming charges when choosing a network

Overall, consumers did not have roaming charges at the front of their minds when choosing a network, in comparison to factors such as the cost of domestic calls and texts, and the number of domestic minutes and texts included in a contract package.

One per cent of personal mobile users spontaneously mentioned that roaming costs were a factor when they selected their network. This increased slightly when respondents were prompted with possible factors – the cost of calls abroad was mentioned by 4%, closely followed by texts (3%) and mobile internet (2%); roaming costs were stated as the most important factor by 2% of network decision-makers.

When specifically asked how important roaming costs were when selecting a network, roaming costs became more of an issue for the respondent. Almost a quarter of those who hadn't mentioned it as a factor earlier claimed that it was either very, or fairly, important to them.

Grouping together responses from the various spontaneous and prompted questions, 36% of respondents claimed to place at least some importance on roaming costs when choosing a mobile network.

The table below displays the groups who placed the greatest and least importance on roaming costs when choosing a network. These all apply to voice calls, text messaging, and mobile internet (Q7/8/9):

Greatest importance	Least Importance
16-34 year olds	55+ year olds
London residents	Scottish residents
ABC1s	C2DEs
Contract customers	PAYG customers
£21+ monthly mobile spend	Up to £20 monthly mobile spend

Further to this, women placed more importance on text messaging abroad than men.

Usage of mobile phone abroad compared to the UK

Around three-fifths of European Travellers claimed to use their mobile phone when they were abroad. Text messaging was the most popular method used (54%), followed by calls (47%), with a lower proportion (13%) using mobile internet (Note that it is likely that not everyone has a data-enabled handset or subscription, and we cannot distinguish these respondents from those who purposefully choose not to use data abroad, e.g. on price grounds). Almost a fifth (17%) of European Roamers used all three methods, of whom 16-34 year olds were the most likely to do so.

The majority of European Roamers said that they used their mobile phone less when abroad than at home, and tended to make calls shorter. The core motivation given for this was cost i.e. mobile services were perceived as too expensive to use in Europe. This is less the case for mobile internet than for text and calls, where it was still the top reason, but only just outweighed the lack of need to use mobile internet abroad.



The following table shows the groups with the highest and lowest usage of mobile phones abroad:

Highest usage	Lowest usage
Calls: 35-54 year olds Texts: 16-54 year olds Internet: 16-34 year olds	All types: 55+ year olds
All types: Contract customers	All types: PAYG customers
All types: £21+ monthly mobile spend	All types: Up to £20 monthly mobile spend

Roaming charges compared to expectations

Overall, there was an improvement in consumer awareness of roaming costs since 2006: 40% of European Roamers who made calls abroad felt that their call costs were in line with expectations (compared to 34% in 2006). This figure was even higher for texts (47%) and mobile internet (55%).

Of European Roamers, those aged 16-34 were more likely to feel that roaming call costs were higher than expected. Despite this, younger groups were more likely to express agreement that roaming costs have become cheaper over the last few years, and that it has become easier to find necessary information.

The following table displays the groups of European Roamers who were most likely to say that costs were more than they had expected. Note that this only covers calls and texts, due to the comparatively low base size of mobile internet roamers:

More than expected, highest incidences	More than expected, lowest incidences
Calls & texts: 16-34 year olds	Calls & texts: 55+ year olds
Calls & texts: Contract customers	Calls & texts: PAYG customers
Calls & texts: £21+ monthly mobile spend	Calls & texts: Up to £20 monthly mobile

Impact of cost reducing methods

Although the majority of European Roamers were aware of at least one way of reducing their roaming costs, a third of them said they were not aware of any of the methods. The following table displays the groups with the highest and lowest awareness of any roaming cost-reducing method:

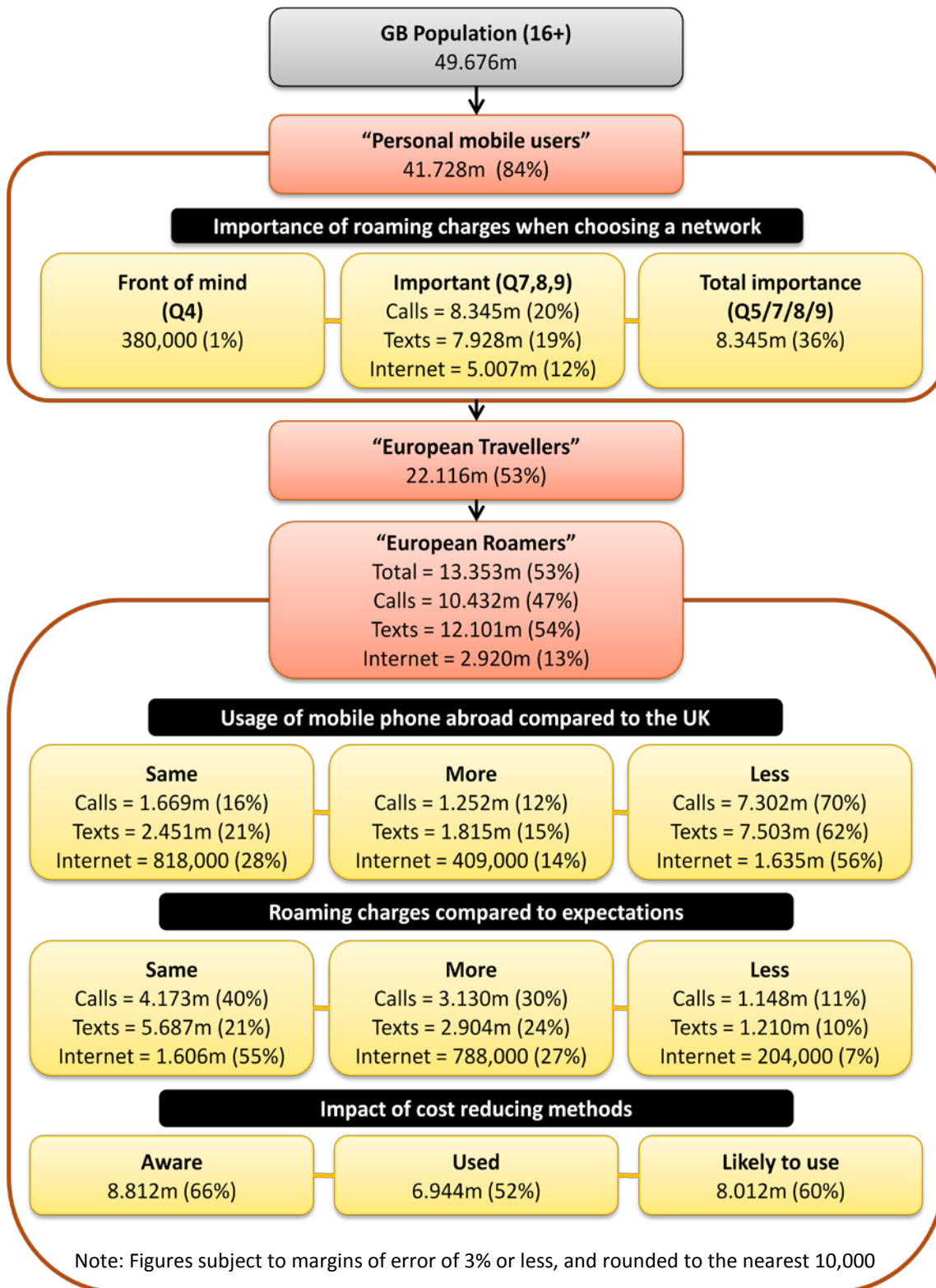
Highest awareness	Lowest awareness
16-34 year olds	55+ year olds

Despite these differences, usage levels among those who were aware were consistent between the groups. Text messaging instead of calling had the highest level of awareness, use, and future intention to use, of all methods. Buying a SIM card in the visited country is the method that had the highest future intention to use, in comparison to the extent that it had been used in the past.

Three in ten of those who claimed to use mobile internet abroad were aware of the recently introduced internet cut-off limit. The majority of these consumers (56%) said they were satisfied with it, with only a very small proportion (1%) saying they were 'fairly dissatisfied'.



Estimates of the number of mobile users that fall into certain behavioural groups



3. Methodology

2,012 interviews with adults aged 16+ were conducted from 8th-12th September 2010, using the TNS CAPI Omnibus.

It is worth noting the following differences between this survey and the one that was conducted in 2006:

- The 2006 study included a sample of 1,028 respondents from Northern Ireland and was UK-representative, while this study is GB-representative (i.e. it excludes Northern Ireland). This is primarily due to the smaller sample size used for the current research, supported by the fact that very few significant differences were observed in the 2006 research between the results for Northern Ireland and for GB.
- In 2006, the overall sample size covering Great Britain was 3,927, almost twice the sample size of this study (2,012). Considering the results of the 2006 research, a smaller sample size is sufficient to provide robust results.
- The 2006 survey covered only voice calls made while abroad in the EU. For the 2010 survey, the questionnaire was expanded to include the three main mobile services – voice calls, text messaging, and mobile internet, as use of the latter services has grown since 2006 and all three roaming services are now regulated at EU level.

For these reasons, although we have provided comparisons between the two surveys throughout, comparisons should be treated with caution and used only as a general benchmark.

Significance testing at the 95% confidence level was carried out. Where there are significant statistical differences between specific groups, these have been illustrated in charts and/ or commented on.

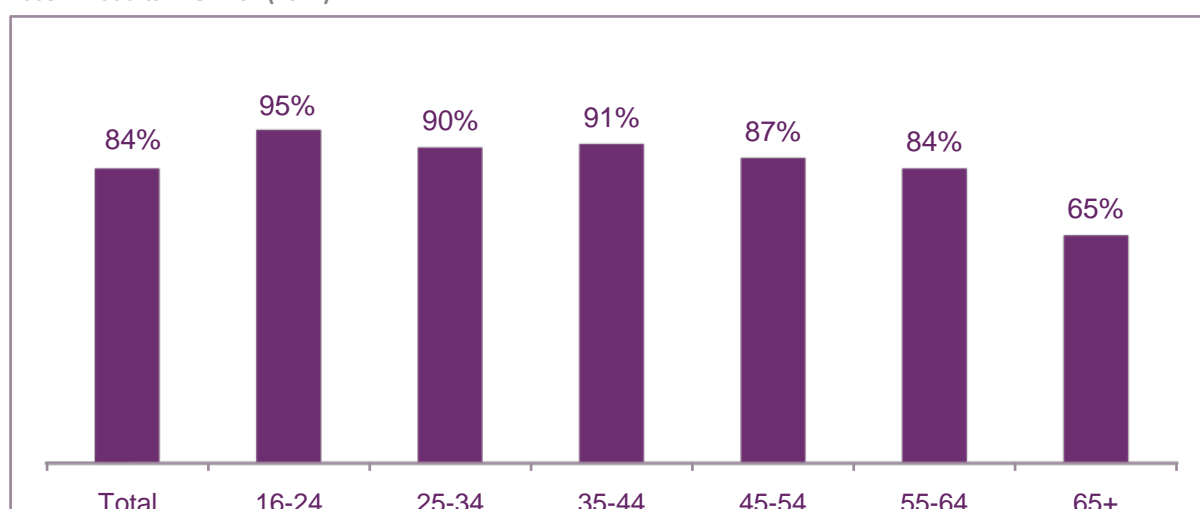
4. General mobile phone ownership and usage

4.1 Usage and type of package

Eighty-four per cent² of those surveyed were personal mobile users. This figure differed with age - 95% of those aged 16-24, compared to 65% of adults aged 65+. However, the proportion of over-55s using a mobile (72%) was significantly higher than in 2006, when the figure was 57%.

Chart: Ownership of personal mobile, by age

Base: All adults in GB 16+ (2012)



Respondents were asked about the type of service they received, and the network they used most often. It is important to note that network composition figures relate to the sample of this survey, and thus some of them may not mirror customer statistics held by the providers themselves.

Just over half (52%) of personal mobile users were pay-as-you-go (PAYG) customers, and this was most common among 55+ year olds – 78% of this age group. Scottish mobile owners were among the most likely to be on PAYG (58%).

Just under half (47%) were post pay/monthly contract customers. 16-34s were most likely to be on a contract (62%), as were those in full time employment (63%). The highest concentration of contract customers was observed in London (58%).

Table: Type of mobile phone service, by demographics

	Total (1649)	16-34 (528)	35-54 (545)	55+ (576)	FT employed (618)	London (215)	Scotland (133)
PAYG	52%	38%	44%	78%	37%	41%	58%
Contract	47%	62%	55%	20%	63%	58%	42%

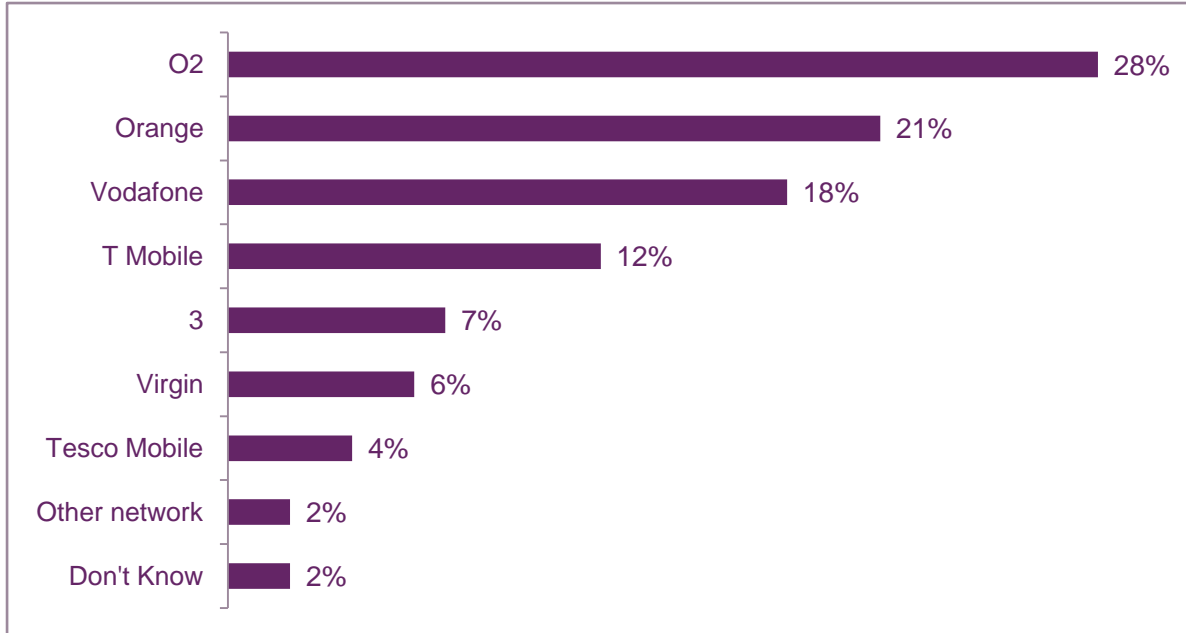
² The main source of Ofcom telecoms market sizing data is the Ofcom Residential Tracker. The Q3 2010 Residential Tracker identifies 89% of GB adults personally use a mobile phone. <http://stakeholders.ofcom.org.uk/binaries/research/statistics/TechnologyTrackerQ32010.pdf>

4.2 Mobile network

The following chart shows the overall breakdown of network subscription among personal mobile users:

Chart: Personal mobile network subscription

Base: All adults in GB who have a mobile phone for personal use (1649)



O2 had the highest number of subscribers (28%), followed by Orange (21%) and Vodafone (18%).

The demographic profile of respondents for each network is shown below:

Table: Demographic profiles of network customers

	O2 (452)	Vodafone (291)	Orange (343)	T-Mobile (200)	'3' (118)	Virgin (111)	Tesco (65*)
Men	52%	47%	48%	38%	55%	45%	56%
Women	48%	53%	52%	62%	45%	55%	44%
16-34	41%	31%	31%	37%	46%	11%	27%
35-54	40%	42%	34%	32%	42%	41%	32%
55+	19%	27%	35%	32%	13%	48%	42%
ABC1	54%	56%	63%	52%	49%	58%	63%
C2DE	46%	44%	37%	48%	51%	42%	37%

*Caution, low base size



4.3 Monthly expenditure

Average monthly mobile expenditure has decreased since the 2006 research, with mobile users now spending £17.77 on average (compared to £29.70 in the 2006 research). It should be noted that this reduction in monthly spend is driven by falling prices rather than lower use, and consumers are, in fact, using more mobile services over time³. The majority of mobile users (62%) said they pay less than £20 per month, with one in four spending between £11 and £20.

There was a significant difference between average monthly spend by contract customers (£26.17), compared to PAYG (£10.11). Correlating to this, there was also a noticeable decrease in average monthly spend with age - £23.70 for 16-34 year olds (majority contract customers), compared to £6.37 for 65+ year olds (majority PAYG).

Among European Roamers who travel abroad at least once a year, monthly mobile expenditure was just over average, at £19.99.

The following table summarises some of the highest and lowest spending groups:

	2006 £ (UK)	2010 £ (GB)
Average spend per month	29.70	17.77
High spenders		
Contract customers	41.44	26.17
16-34 year olds	33.41	23.70
London	35.52	22.38
Income 17.5k-29.9k	24.65	20.55
Income £30k plus	34.44	20.47
Low spenders		
Never use mobile in Europe	18.29	13.66
PAYG customers	17.68	10.11
Own house outright	25.55	10.77
Not working, or looking for work	18.77	12.32
55 years plus	15.49	9.51

Note: due to the strong correlation between high and low spending in terms of PAYG and contract (86% of PAYG spend below £20 a month, and 86% of contract spend £21+ a month), we have excluded spend from any sub-group analysis throughout the report. It can therefore be assumed that where significant differences occur between the two types of services (PAYG and contract), this also relates to these two spend categories (£20 a month, and £21+ a month).

³ See Ofcom Communications Market Report 2010 for more details:
<http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr10/>

5. Selecting a phone network

5.1 Summary table

Summary data		% of population (population estimates)	
		2006 - UK	2010 - GB
Population		100%	100% (49.676m)
Mobile users - personal use		77%	84% (41.728m)
		% mobile users (population estimates)	
		2006 - UK	2010 - GB
Mobile user selected network		82%	91% (37.972m)
Roaming costs given as reason for selecting network – spontaneous (Q4)		1%	1% (380,000)
Roaming costs considered on selecting network – Prompted (Q5)	Calls	NA	4% (1.518m)
	Texts	NA	3% (1.139m)
	Internet	NA	3% (1.139m)
Roaming costs considered within top 3 reasons for choosing network (Q6)	Calls	NA	2% (759,000)
	Texts	NA	1% (380,000)
	Internet	NA	1% (380,000)
Roaming costs considered 'important' when selecting network (prompted) (Q7/8/9)	Calls	NA	20% (8.345m)
	Texts	NA	19% (7.928m)
	Internet	NA	12% (5.007m)
Total importance of roaming charges (calls, texts & mobile internet) when selecting network (Q5+Q7/Q8/Q9)		NA	27% (11.267m)
Total importance of roaming <u>call</u> charges when selecting network (Q5+Q7)		21%	24% (10.014m)

Note: Population estimates based on GB TGI 2010 Q3 (Apr 09 – Mar 10)

Figures subject to margins of error of 3% or less, and rounded to the nearest 10,000

5.2 Factors considered when choosing a network

Spontaneous responses

Personal mobile users were asked what factors they took into consideration when selecting the mobile phone network that they used most frequently. Around nine out of ten (91%) spontaneously indicated that they chose the network themselves, while the remaining 9% relied on someone else to make the decision.

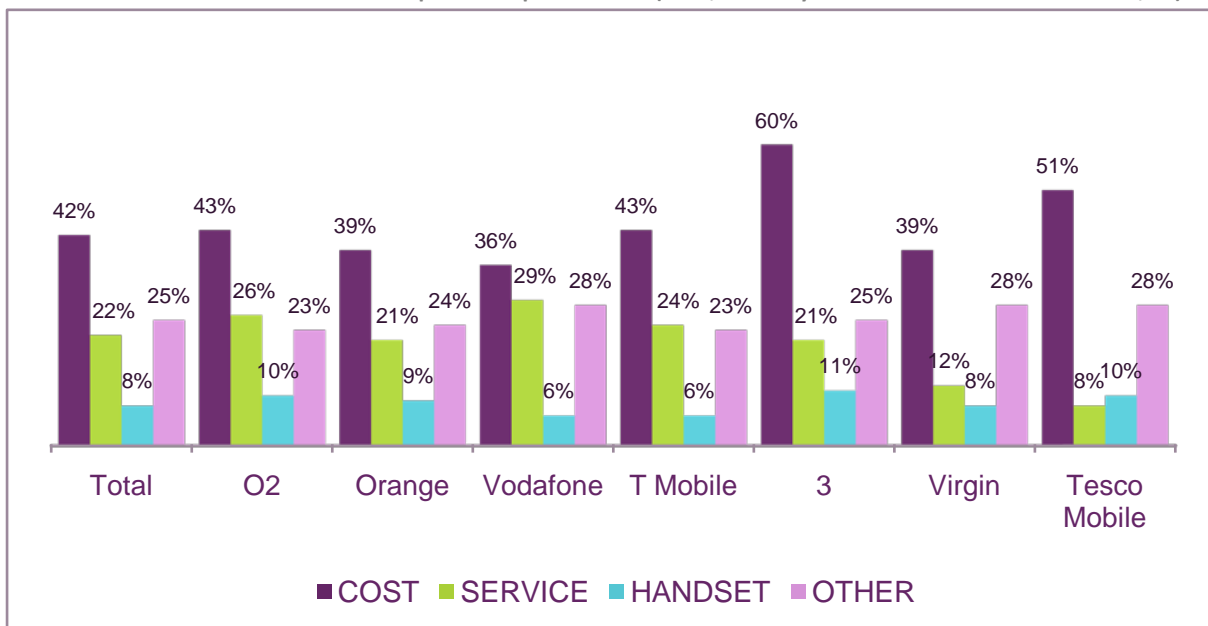


As in the 2006 research, cost was the main driver for choosing a network, with 42% of GB mobile users spontaneously giving a cost-related response to the question. The specific top priorities were the general costs of calls/texts (24%) and the amount of minutes/texts included in the package (20%). Despite the prevalence of price-related decision-making, there has been no shift in the consideration of the cost of using a mobile abroad (when asked unprompted), with just 1% of users explicitly stating this was a factor when selecting their network.

The following chart shows the breakdown of factors among those on specific mobile networks:

Chart: Reasons for choosing mobile network (spontaneous)

Base: All adults in GB who have a mobile phone for personal use (1649, varies by network: Lowest = Tesco Mobile, 65)



It is evident from this that cost is more important for '3' customers than those on other networks.

Service-related features were spontaneously mentioned by 22% of respondents and were more likely to be chosen by those with the larger four MNOs (O2, Orange, Vodafone and T-Mobile) than the two MVNOs (Virgin and Tesco Mobile), with Vodafone customers scoring highest at 29%. The most common service factors were reliability of service and geographic coverage of the UK (both 13%).

Prompted responses

When prompted with a list of aspects that could be considered when selecting a network, there was little change in the patterns observed from the spontaneous responses. Almost half gave a cost-related response (48%), with cost of calls and text messages (31%) the top response. Cost was less of an issue for those over 55 (32%), those without children (57%), and those on PAYG (39%).

Table: % of groups who mentioned any cost factor taken during the decision making process

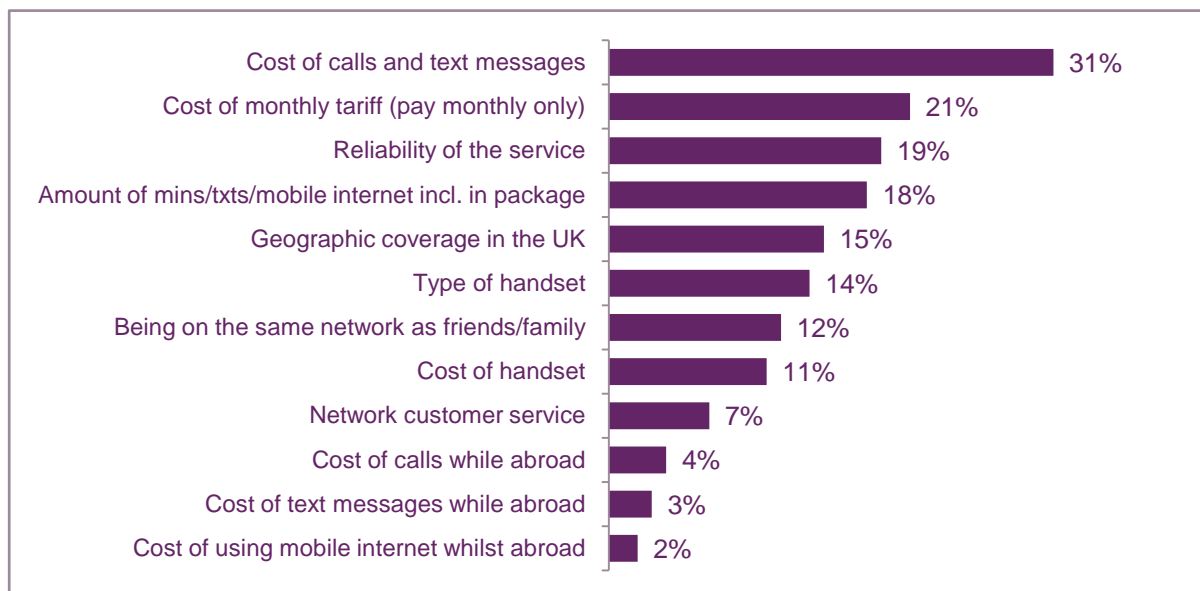
	Total (1481)	16-34 (492)	35-54 (510)	55+ (479)	Children (481)	No children (1000)	PAYG (795)	Contract (676)
COST FACTORS	48%	53%	53%	32%	57%	43%	39%	56%



The cost of calls, texts and mobile internet while abroad were asked about individually, and were identified as a decision making factor by 4%, 3% and 2% of respondents overall, rising to 9%, 6% and 7% in London.

Chart: Specific factors considered when choosing mobile network (prompted)

Base: All adults in GB with a personal mobile who made the decision in choosing a network (1,481)



Rating of importance

Respondents were asked for the first, second and third most important factors in their network decision-making process. The results for this remained consistent with the spontaneous and prompted questions, with either ‘cost of calls and text messages’ or ‘cost of monthly tariff’ cited by two-fifths of respondents.

Roaming costs (for calls, texts or mobile internet) were mentioned as the most important factor by 2%, and were within the top three factors for 4% of network decision-makers.

Table: % of decision makers who placed roaming costs for <service> in top 3 reasons for choosing network:

	Total (1481)
Roaming calls	2%
Roaming text messages	1%
Roaming mobile internet	1%

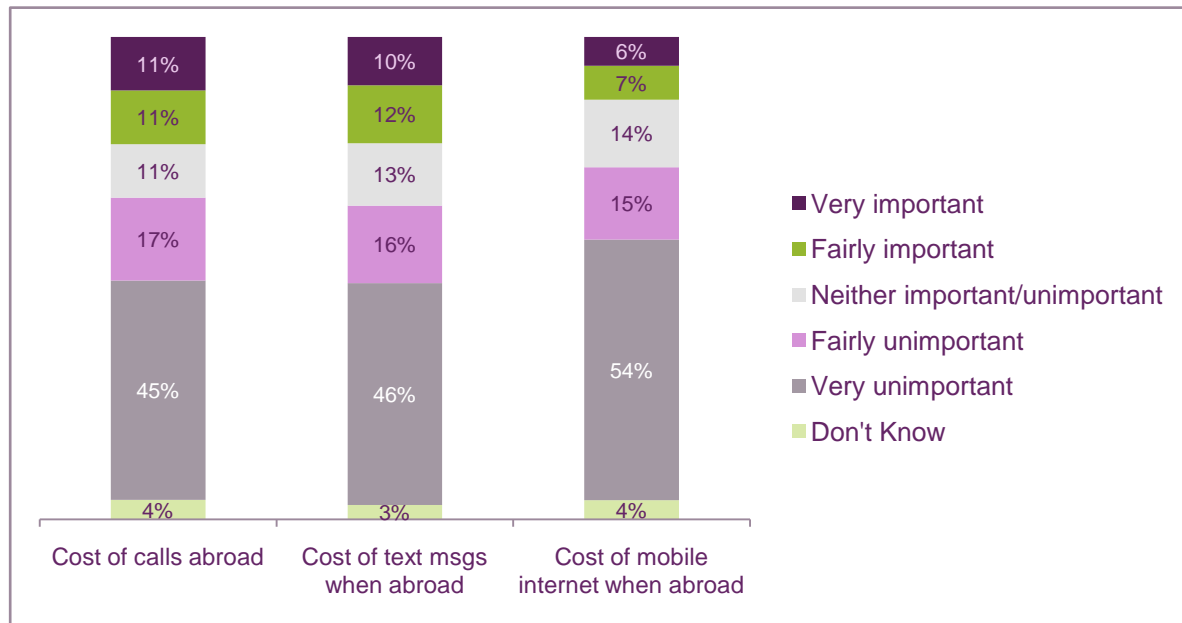
5.3 Importance of roaming charges when choosing a network

Respondents who did not mention previously (i.e. spontaneously or when prompted) that the cost of using their phone abroad (for calls, text messages, and mobile internet) was a factor they considered when choosing a network, were specifically asked how important it was to them.



Chart: Importance of roaming costs

Base: All personal mobile users who didn't previously mention cost of roaming calls/texts/internet (1424, 1444, 1450)



Cost of calls abroad

As observed in the 2006 research, consumers did not indicate that roaming charges were at the front of their mind when they chose a mobile network, either when asked spontaneously or when presented with a list of factors. But they did attribute greater importance to this when asked in isolation: 22% of those who had not previously mentioned the cost of calls abroad, when asked in isolation went on to claim that this was either very, or fairly, important when they chose their network. This accounts for half of those who said they ever use their mobile in the European for calls.

In terms of age, the figure was highest for 25-34 year olds (31%), and lowest for 55+ year olds (16%). ABC1s (26%) also placed more importance on it than C2DEs (19%). The cost of calls was more likely to be a concern for contract customers than for those on PAYG (27% compared to 19%). Geographically, mobile phone users from London were much more likely, and those in Scotland were the least likely, to place importance on roaming call charges than those from other regions (47% and 12% respectively). These statistics were generally linked to the likelihood of travelling abroad, i.e. 25-34s, ABC1s, and contract customers were more likely than 55+ year olds, C2DEs, and PAYG customers to travel abroad. This is explained further in Section 6.

Table: % who stated roaming costs of calls where either fairly or very important

Total (1424)	16-24 (224)	25-34 (251)	35-54 (485)	55+ (464)	ABC1 (635)	C2DE (789)	London (190)	Scotland (114)	PAYG (768)	Contract (646)
23%	23%	31%	24%	16%	26%	19%	47%	12%	19%	27%

Cost of text messaging abroad

When choosing a mobile network, the cost of text messaging while abroad was seen as similarly important to that of calls, with 22% of personal mobile users saying that this was fairly, or very, important, doubling to 44% of those who said that they use text when abroad.

In terms of age, it was more likely to be considered important by 16-34s (27%) than by other age groups. It was also more likely to be important to females (25%) than to males (18%), a distinction



that wasn't apparent in the case of calls. The trends that were observed for social grade, contract customers and London residents with regard to calls also exist for text messages.

Table: % who stated roaming costs of texts where either fairly or very important

Total (1444)	Male (706)	Female (738)	16-34 (474)	35-54 (500)	55+ (470)	ABC1 (641)	C2DE (803)	London (197)	Scotland (115)	PAYG (778)	Contract (656)
22%	18%	25%	27%	24%	13%	24%	19%	49%	14%	19%	25%

Cost of using the internet abroad

A lower number overall (13%) claimed that mobile internet costs abroad were a factor when they chose their network, but this rose significantly to 48% among those who access the internet via their mobile phone abroad.

The uplift in London was even more pronounced for the internet than for calls and texts, with 36% saying the cost of mobile internet roaming was fairly or very important. Again, those aged 16-34 (19%), and contract customers (17%) attached most importance to this. Interestingly, there was little difference by social grade or gender.

Table: % who stated roaming costs of mobile internet where either fairly or very important

Total (1506)	Male (705)	Female (745)	16-34 (478)	35-54 (500)	55+ (472)	ABC1 (647)	C2DE (803)	London (195)	Scotland (115)	PAYG (787)	Contract (653)
13%	13%	13%	19%	13%	6%	14%	12%	36%	6%	10%	17%

Total importance of roaming costs

By netting together the spontaneous, prompted and specific questions on the importance of roaming costs when selecting a network (Q5 and Q7/8/9: See questionnaire for reference) it is possible to deduce the total importance of roaming costs: overall, 36% of respondents placed some importance on this when choosing a network.

Why roaming charges were not considered important when choosing a network

The main reason why roaming costs were considered unimportant by some people at the network selection stage related to their lack of foreign travel; 23% of all those who said the cost of calls, texts or mobile internet abroad was unimportant said that they rarely travelled abroad, 22% saying they never did. [Meanwhile, 13-14% said they never use their mobile when abroad]. The results are summarised by service below:

Why roaming costs of <service> not considered important	Service			
	Total (1055)	Calls (895)	Texts (907)	Internet (1009)
Rarely travel abroad	23%	25%	25%	23%
Never travel abroad	22%	25%	25%	22%
Never use mobile while I'm abroad	13%	13%	14%	13%
Don't/rarely use mobile for <service> while abroad	12%	13%	10%	12%
Never use mobile for <service>	7%	7%	5%	7%
Didn't think about it	3%	2%	3%	3%



Across the three types of service, there was a noticeable difference in terms of age between those who said they 'never' or 'rarely' travelled abroad – 27% of 16-34s said they 'rarely' travelled abroad and therefore did not consider roaming call costs important, in contrast to 16% for over-55s. Conversely, a quarter of over-55s stated that the reason why they do not consider roaming call costs important is because they 'never travel' abroad, compared to 18% of 16-34 year olds. C2DEs were much more likely than ABC1s to say they never travel abroad.

Table: Why roaming charges not considered important when selecting network, by age

	Total (1055)	16-34 (328)	35-54 (373)	55+ (354)	ABC1 (464)	C2DE (591)
Rarely travel abroad	23%	27%	24%	16%	22%	24%
Never travel abroad	22%	18%	22%	25%	14%	31%

6. Use of mobile phones in Europe

6.1 Summary table

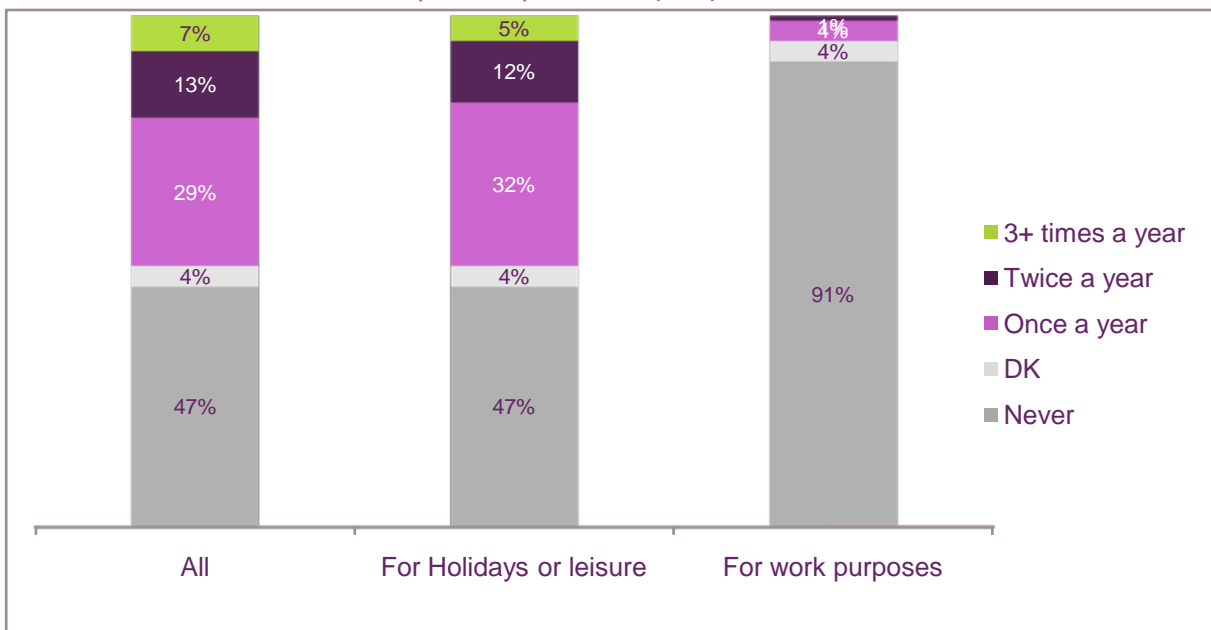
Summary data		% of population (Population estimates)	
		2006 -UK	2010 - GB
Mobile users - personal use		77%	84% (41.728m)
		% mobile users (Population estimates)	
		2006	2010
Mobile users who travel abroad to Europe (European Travellers)		55%	53% (22.116m)
Mobile users who use their phone in Europe		37%	32% (13.353m)
	Calls	NA	25% (10.432m)
	Texts	NA	29% (12.101m)
	Internet	NA	7% (2.920m)
Reasons for not using mobile/using mobile less when abroad (Top answers)	Too expensive	19%	23% (11.244m)
	No need	11%	19% (7.928m)
	Don't want to be disturbed	9%	9% (3.755m)

6.2 Overseas travel to Europe

The following chart displays the frequency with which personal mobile owners travel abroad:

Chart: Frequency of travelling to countries within Europe

Base: All adults in GB who have a mobile phone for personal use (1649)



Fifty-three per cent of personal mobile users could be classified as European Travellers. Almost all of these (91%), claimed to travel in Europe for holiday/leisure, while 9% travelled for work. The majority of European Travellers specified that they do this once (54%), or twice (25%) a year. For this reason, we are unable to include frequency of travel in any sub-group analysis throughout the rest of the report (bases sizes are too small for those who travel more than twice a year).

ABC1s were the most likely group to be European Travellers (64%), while C2DEs (39%) and over-65s (46%) were the least likely.

Table: % of groups who ever travel to Europe

	Total (1649)	16-34 (528)	35-54 (545)	55-64 (257)	65+ (319)	ABC1 (725)	C2DE (924)	PAYG (930)	Contract (707)
European Travellers	53%	54%	54%	57%	46%	64%	39%	46%	60%

6.3 Use of mobile phones abroad

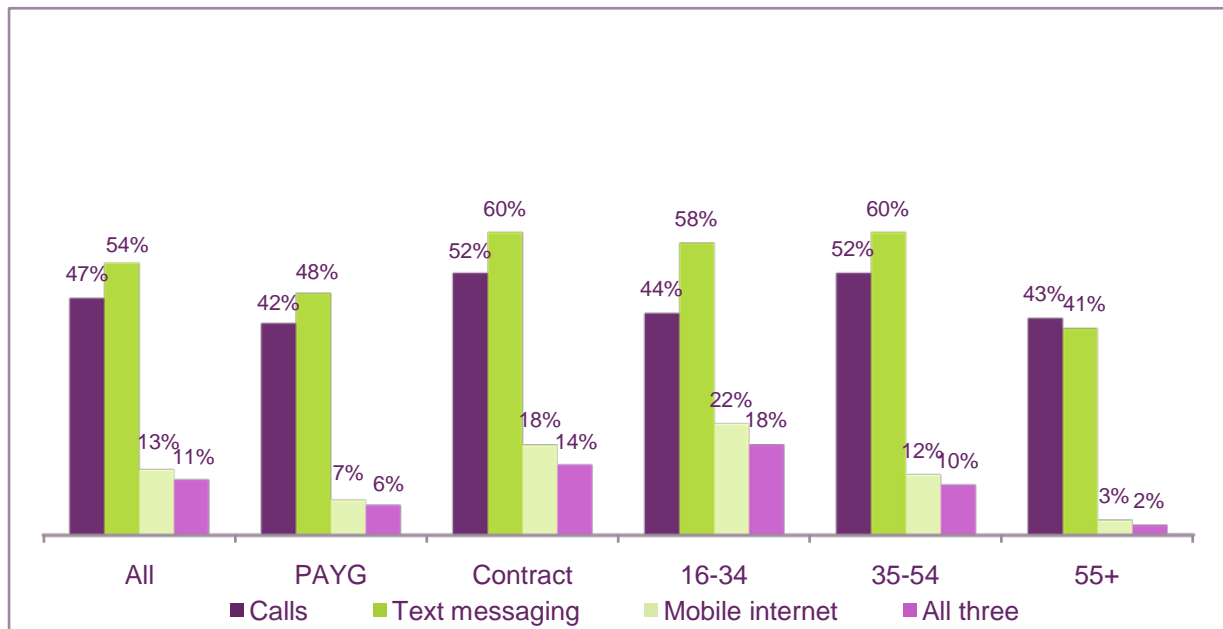
General usage

Sixty-one per cent of European Travellers could also be classified as European Roamers, having used at least one of the three mobile services asked about while abroad. Text messaging was used the most (54%), followed by voice calls (47%) and mobile internet (13%). As a percentage of all GB personal mobile users, this equates to 25%, 29% and 7% respectively.

Eleven per cent of European Travellers (17% of European Roamers) said that they used all three roaming services, and 16-34s were the most likely to do so (18%). Those on a contract were more likely than PAYG customers to say they used their phone abroad, as displayed below:

Chart: Use of mobile phone abroad

Base: All adults in GB who travel outside the UK to Europe at least once a year (804)



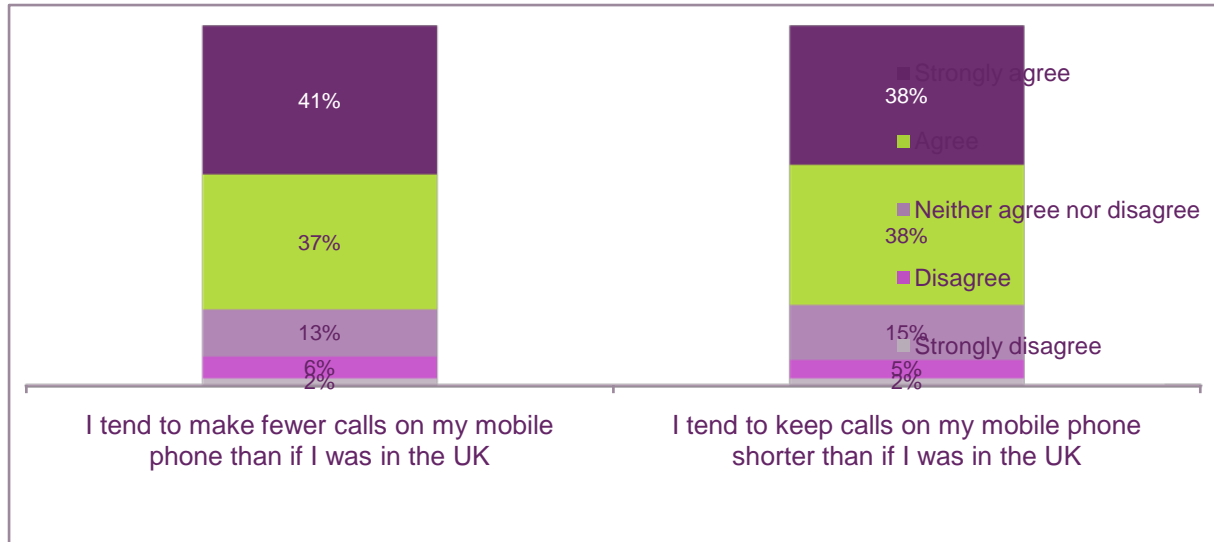
Calls



European Roamers were read out a number of statements about using their mobile when in Europe and were asked the extent to which they agreed with each statement. First, they were asked the extent to which they agree that they make fewer calls when abroad than when they are in the UK, and second, the extent to which they keep calls shorter when abroad than when at home. As evident from the chart below, overall agreement (strongly agree + agree) was very strong on both these counts, with 78% for the first statement, and 76% for the second.

Chart: Agreement statements on use of mobile to make calls abroad

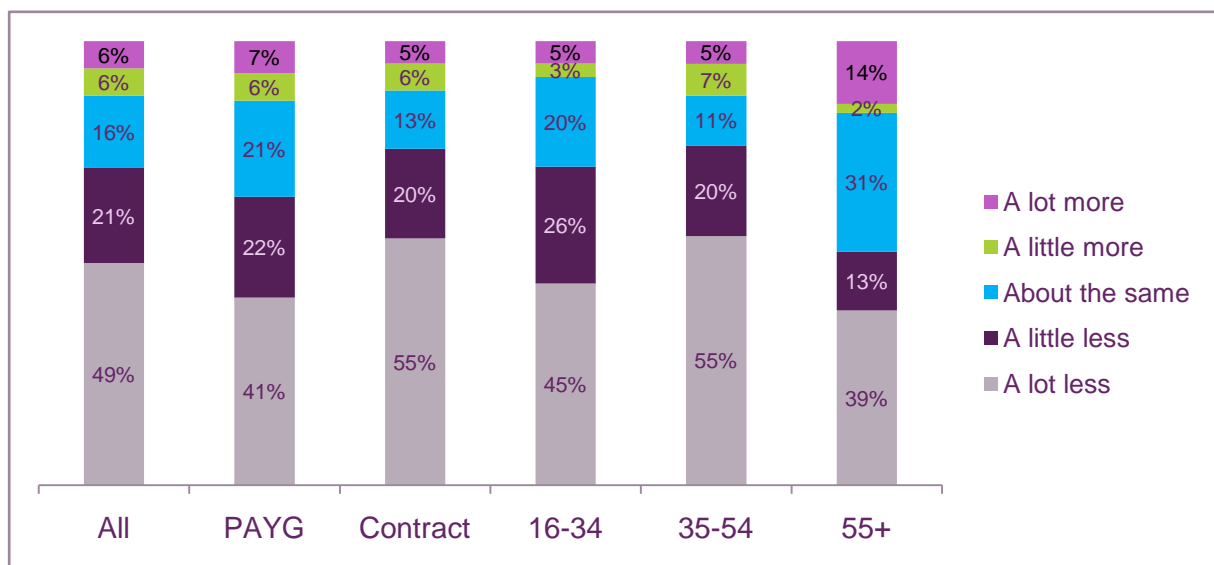
Base: All adults who use their mobile phone in Europe (550)



European Roamers were also asked the extent to which they use their mobile phone abroad compared to in the UK. Of the 47% of European Travellers who make personal calls with their mobile phone abroad, seven in ten claimed to call less than they do when at home in the UK, with the majority stating they call a lot less (49%). Sixteen per cent claimed to call the same amount, and 12% more. The latter category is skewed towards the older age bands (16% for 55+, compared to 7% for 16-34s). Contract customers were more likely than PAYG to say that they phoned less often than when at home (75% compared to 63%).

Chart: Extent to which EU Roamers make calls when abroad compared to home

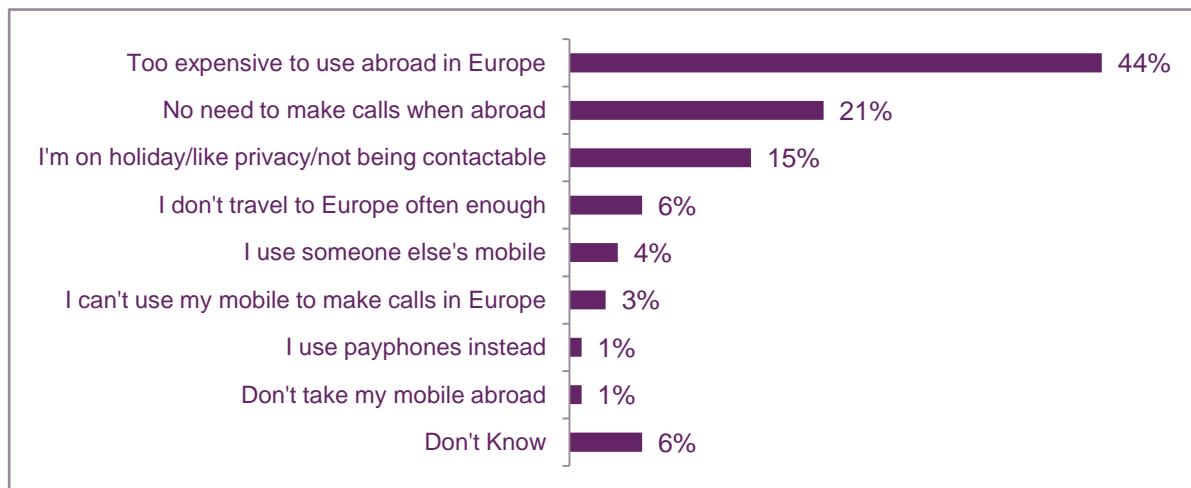
Base: All adults in GB who use their mobile phone for calls in Europe (367)



The main reasons given for not using a mobile phone to make calls in Europe were as follows:

Chart: Reasons for using voice roaming less or not at all when abroad

All adults in GB who use their mobile less or never for calls when in Europe (696)



The primary motivation given for calling less (or not at all) when abroad was the cost (44%). This was most common among the youngest age group (60% of 16-24s). The older age groups were more likely than the younger ones to say that they don't need to make calls abroad - 35% of 65+ year olds said this, compared to 16% of 16-24s.

	Total (696)	16-24 (110)	25-34 (125)	35-44 (127)	45-54 (114)	55-64 (109)	65+ (111)
Too expensive	44%	60%	55%	39%	44%	36%	35%
No need to call	21%	16%	21%	17%	19%	23%	35%

Text Messaging

54% of European Travellers claimed to use text messaging while abroad. Of these, 62% said they texted less. However, 15% said they did it more than at home in the UK, and 21% 'the same amount'.

As with calls, cost was the main driver for texting less or not at all (36%). And lack of need was the second most popular reason given (23%), with similar age trends as for calls.

Chart: Extent to which EU Roamers send text messages when abroad compared to home

Base: All adults in GB who use their mobile phone for text messaging in Europe (420)

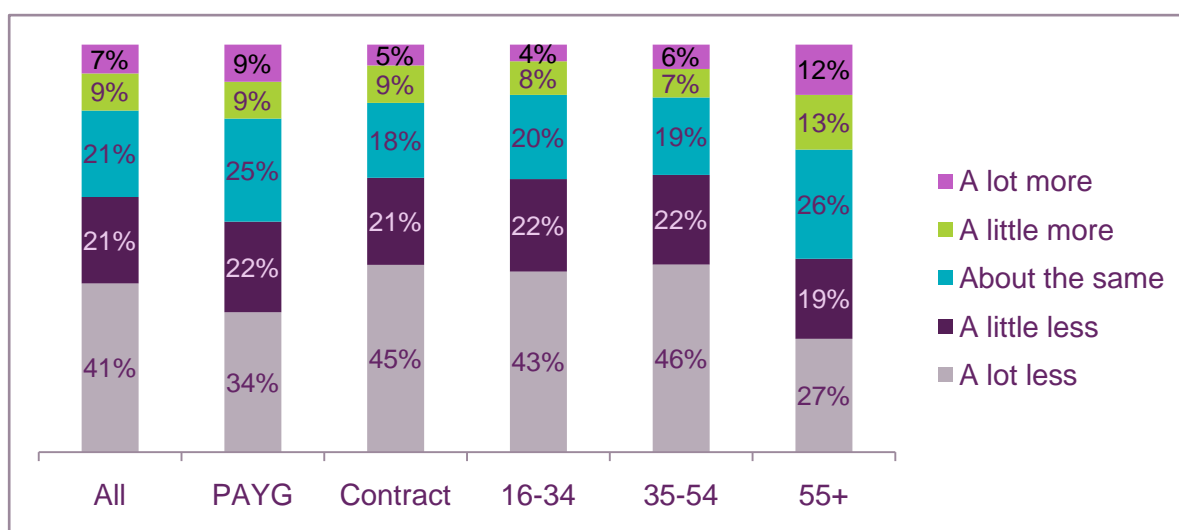
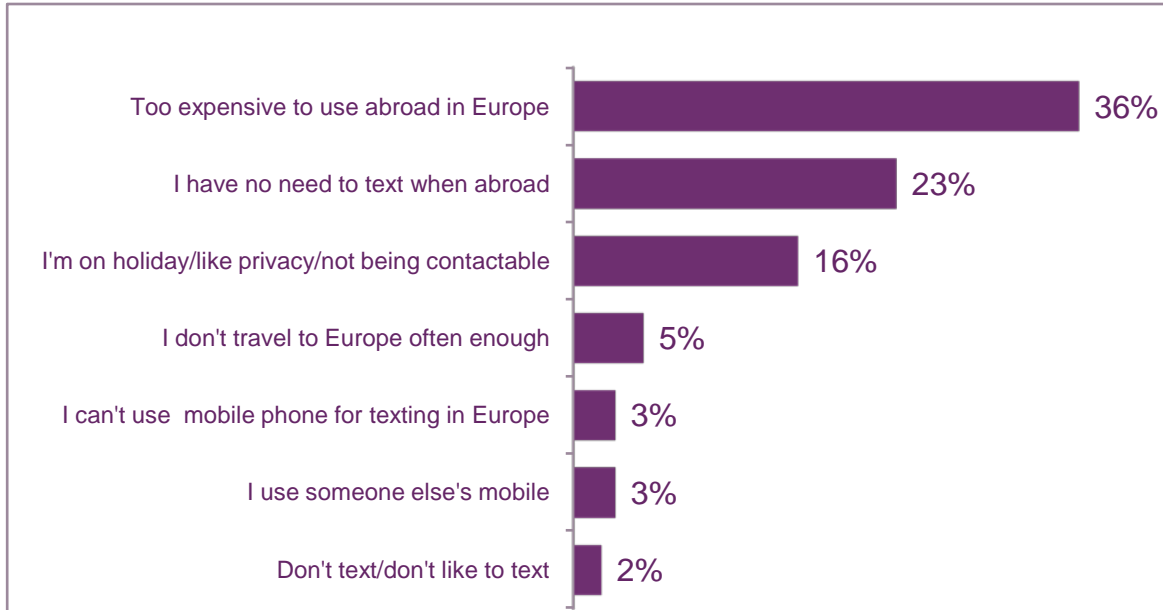


Chart: Reasons for using text roaming less, or not at all, when abroad

Base: All adults in GB who use their mobile less or never for text messaging when in Europe (647)

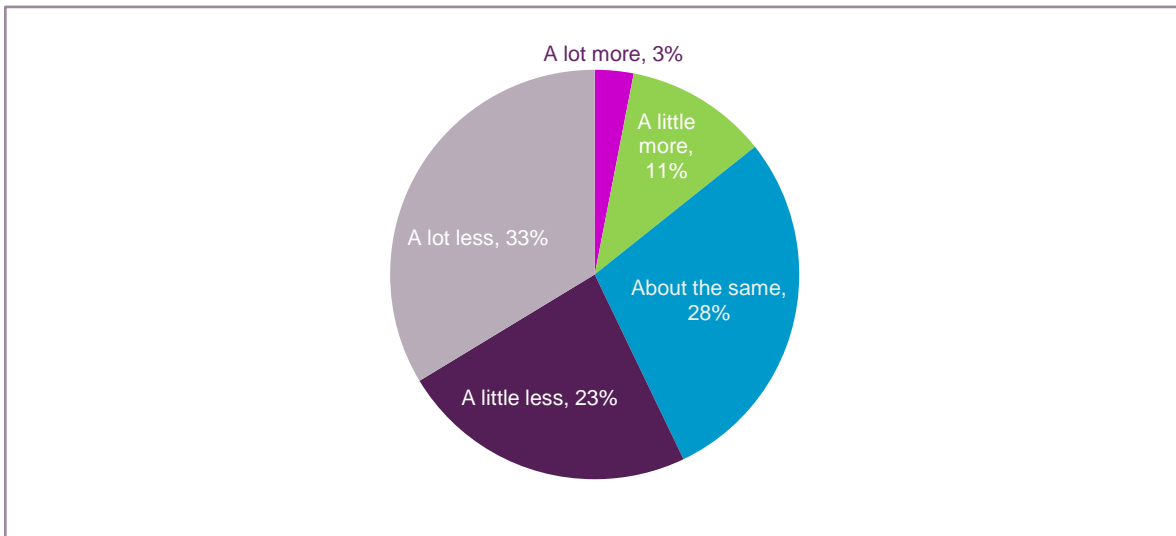


Mobile internet

13% of European Travellers claimed to use the internet on their mobile when abroad. Of these, 56% said they used it less than when they were at home (33% a lot less), and 14% more. Note that the base of mobile internet roamers (92) was too low to drill down further, unlike calls and texts.

Chart: Extent to which EU Roamers use mobile internet when abroad compared to home

Base: All adults in GB who use their mobile phone for mobile internet in Europe (92* Caution low base size)

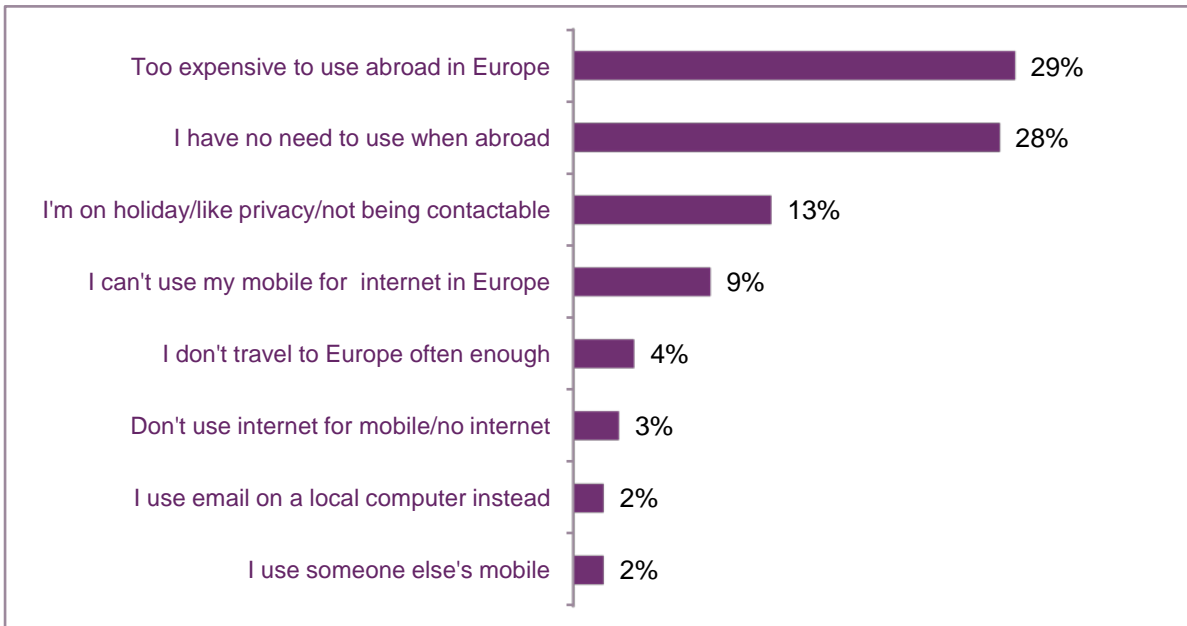


Consistent with calls and texts, cost (29%) and lack of need to use (28%) were the two main reasons for using mobile internet less or not at all.



Chart: Reasons for using mobile internet roaming less or not at all when abroad

Base: All adults in GB who use their mobile phone less or never for mobile internet when in Europe (763)



Over-55s (14%) and PAYG (13%) customers were the most likely to state that they were not able to use the internet when roaming in Europe.

Table: % of groups who say they are not able to use mobile internet in Europe

Total (763)	16-34 (241)	35-54 (265)	55+ (257)	PAYG (383)	Contract (375)
9%	5%	8%	14%	13%	5%



7. Roaming costs

7.1 Actual roaming costs compared to expectations

Respondents were asked to benchmark the price that they were charged last time they used a particular roaming service, compared to what they had expected. The results are summarised in the following table:

		% of European Roamers (Population estimates)
Calls	Charged more than expected	30% (3.130m)
	Charged about the same as expected	40% (4.173m)
	Charged less than expected	11% (1.148m)
	Don't Know	19% (1.982m)
Texts	Charged more than expected	24% (2.904m)
	Charged about the same as expected	47% (5.687m)
	Charged less than expected	10% (1.210m)
	Don't Know	19% (2.299m)
Internet	Charged more than expected	27% (788,000)
	Charged about the same as expected	55% (1.606m)
	Charged less than expected	7% (204,000)
	Don't Know	11% (321,000)

Calls

Forty per cent of European Roamers who used their phone for roaming calls thought the actual cost they faced the last time they were abroad was broadly what they had expected. One in ten felt it was less than expected, and three in ten felt it was more than expected. Younger roamers were most likely to say it cost more (37% for 16-34s, compared to 19% for over-55s).

Table: Costs of calls compared to what was expected

	Total (367)	16-34 (111)	35-54 (145)	55+ (111)	PAYG (159)	Contract (208)
More than expected	30%	37%	32%	19%	25%	34%
Less than expected	11%	13%	12%	7%	10%	12%
About the same	40%	34%	42%	42%	41%	39%
Don't Know	19%	16%	14%	31%	10%	15%



Text messaging

Almost half (47%) of those who claimed to use text messaging when abroad said the actual cost was as they expected. Almost a quarter said it was more than they had expected, with 10% saying it was less.

Again, the 'more than expected' figure falls with age. It was higher among contract customers than PAYG (28% compared to 18%).

Table: Costs of texts compared to what was expected

	Total (420)	16-34 (147)	35-54 (168)	55+ (105)	PAYG (159)	Contract (208)
More than expected	24%	30%	23%	19%	18%	28%
Less than expected	10%	10%	12%	7%	11%	10%
About the same	47%	41%	50%	53%	52%	44%
Don't Know	19%	19%	16%	24%	19%	18%

Mobile internet

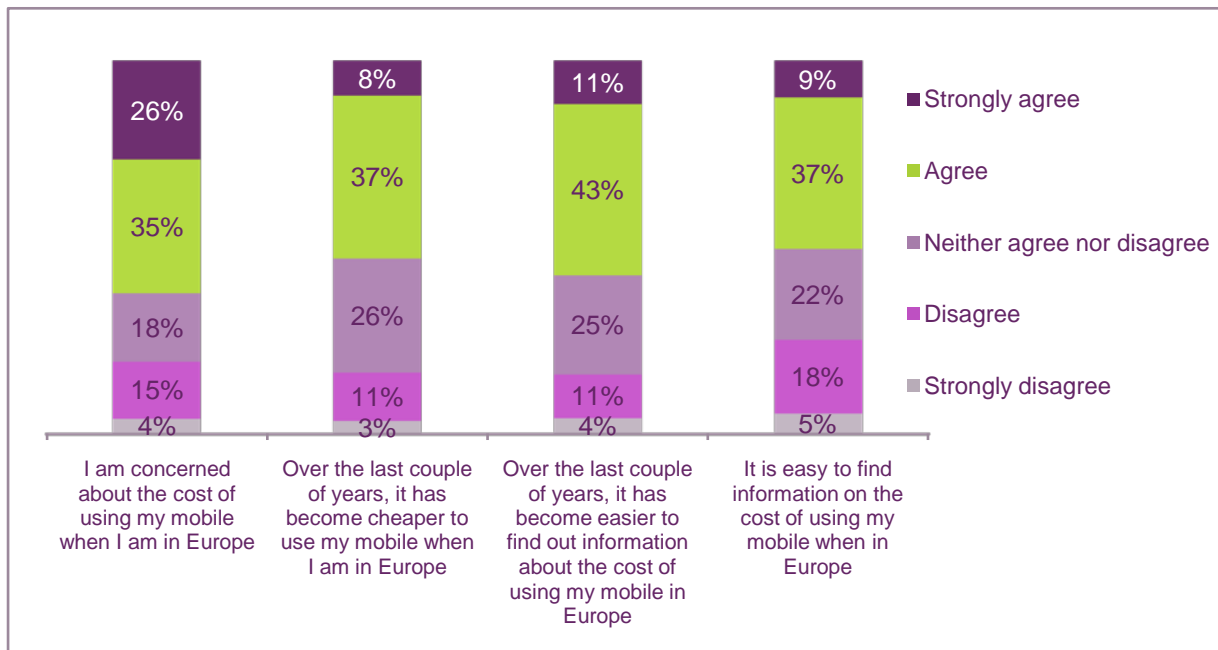
Of the three roaming services, mobile internet costs seemed most closely to match consumer expectations, with 55% of users stating that the last time they used this they paid what they expected. Over a quarter (27%) of users said they had experienced higher than expected costs. As noted earlier, the base of mobile internet roamers (92) was too low to drill down further than this.

Attitudes to roaming costs

European Roamers were read out a number of statements about using their mobile when abroad and were asked about the extent to which they agreed with each statement.

Chart: Agreement with statements concerning roaming costs

Base: All adults in GB who use their mobile in Europe (476)



Around three in five (61%) European Roamers agreed that they were concerned about the cost of using their mobile phone while abroad (43% strongly agree). Younger roamers were more concerned, with agreement among 16-34s standing at 64% compared to 51% of over-55s.

Despite this, the majority of European Roamers (45%) also agreed that it had become cheaper to use a mobile phone when in Europe, compared to 14% who disagreed. There were no significant differences in terms of age.

Overall agreement ('strongly agree' + 'agree') was also relatively high regarding the increased ease of finding information on roaming costs nowadays – 53%, compared to 15% disagreement. Once again it was the younger roamers (generally on contracts), who gave the more positive responses; 57% of 16-34 year olds believed that roaming cost information had become easier to find, compared to 41% of 55+s. It is plausible to infer that this increased access to price information is a key reason why the young said they are more concerned about roaming charges.

46% of European Roamers agreed that it is generally easy to find price information.

Table: % of groups who agreed to some extent with statements about roaming costs

	Total (476)	16-34 (158)	35-54 (186)	55+ (132)
Concerned about cost of using mobile phone in Europe	61%	64%	63%	51%
Believe it has become cheaper to use mobile in Europe	45%	45%	45%	44%
Believe it has become easier to find roaming cost information	53%	57%	56%	41%
Believe it is easy in general to find information about roaming costs	46%	49%	46%	42%

7.2 Methods of reducing roaming costs

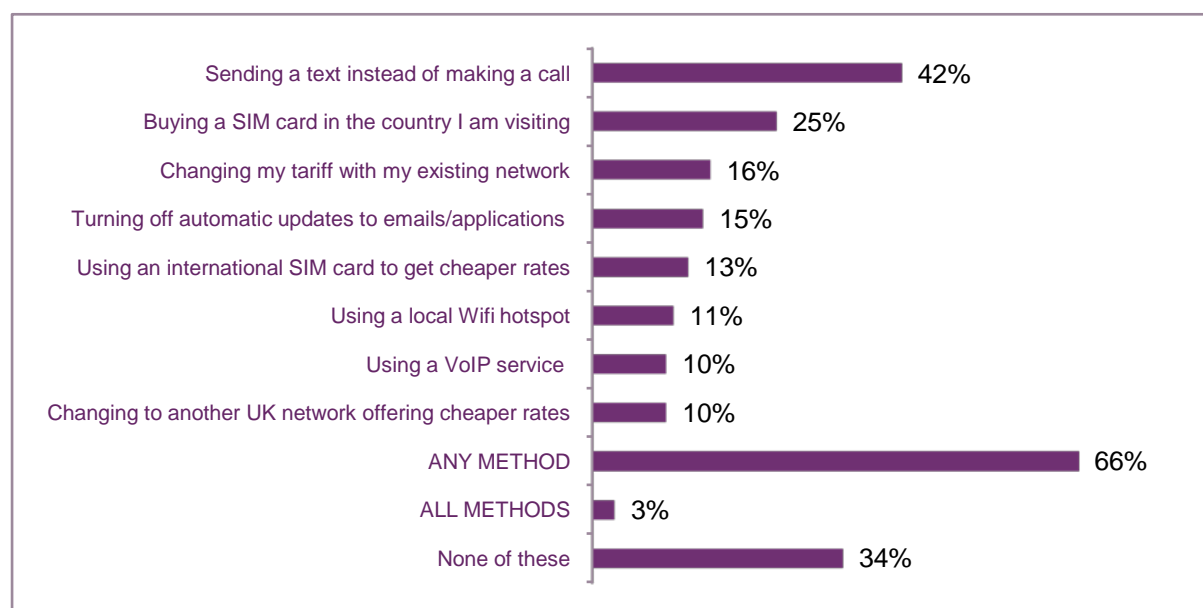
Summary table		% European Roamers (Population estimates)
		2010 - GB
Awareness of cost reducing methods (top Answers)	Texting rather than calling	42% (5.608m)
	Buy SIM in country visiting	25% (3.338m)
	Change tariff with existing network	16% (2.003m)
	Turn off automatic updates	15% (2.136m)
	Any method	66% (8.812m)
Use of cost reducing methods (top answers)	Texting rather than calling	34% (4.540m)
	Turn off automatic updates	9% (1.202m)
	Buy SIM in country visiting	7% (935,000)
	Change tariff with existing network	6% (801,000)
	Any method	52% (6.944m)
Might consider cost reducing methods (top answers)	Texting rather than calling	31% (4.139m)
	Buy SIM in country visiting	14% (1.869m)
	Turn off automatic updates	9% (1.202m)
	Change tariff with existing network	6% (801,000)
	Any method	60% (8.012m)

Awareness

European Roamers were prompted with a list of ways in which they could reduce the cost of using their mobile abroad, and were asked which ones they were aware of. The results are shown in the chart below:

Chart: Awareness of methods of reducing roaming costs

Base: All adults who use their mobile phone in Europe (804)



Two-thirds of roamers were aware of at least one of the methods, with the most recognised one being the use of text messaging instead of making calls (42% awareness).

A third of roamers were not aware of any of the methods shown. They were most likely to be from the older age groups (44% of 55+ year olds). Despite this there were no significant differences observed between PAYG and contract customers.

Table: % of groups not aware of any of roaming cost-reducing methods

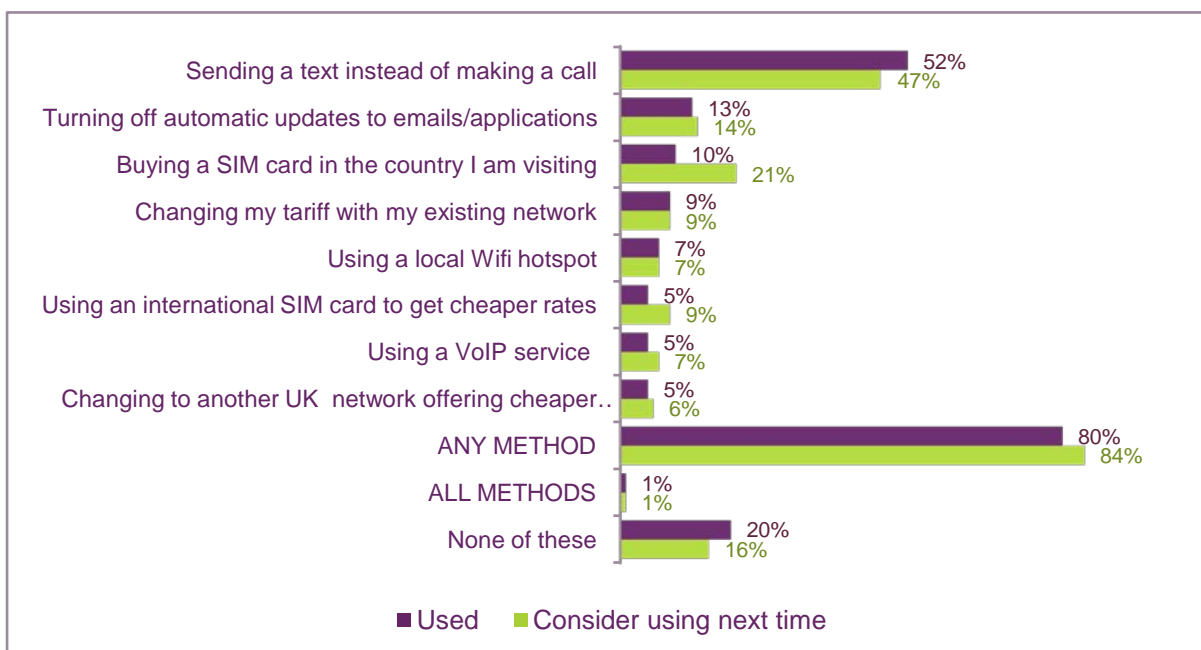
Total (476)	16-34 (158)	35-54 (186)	55+ (132)
34%	31%	32%	44%

Current and future use

Respondents who were aware of cost-reducing methods were also asked if they had used them, and if they planned to use them again in the future. Eighty per cent of those aware of any of the methods had used one in the past, and 84% said they would consider using any of the methods next time.

Chart: Current and future use of methods of reducing roaming costs

Base: All adults who were aware of cost-reducing methods (309)



The chart above shows the proportions of previous and intended future use among those who said they were aware of any of the cost-reducing methods listed. These proportions naturally increased when basing each on awareness of that *particular* method. For example, 80% of those who said they were aware of text messaging as an alternative to calls said they had used the method themselves in the past to help reduce costs. Furthermore, 73% of those who said they were aware of text messaging as an alternative to calls claimed they would be likely to consider using it next time they were abroad.

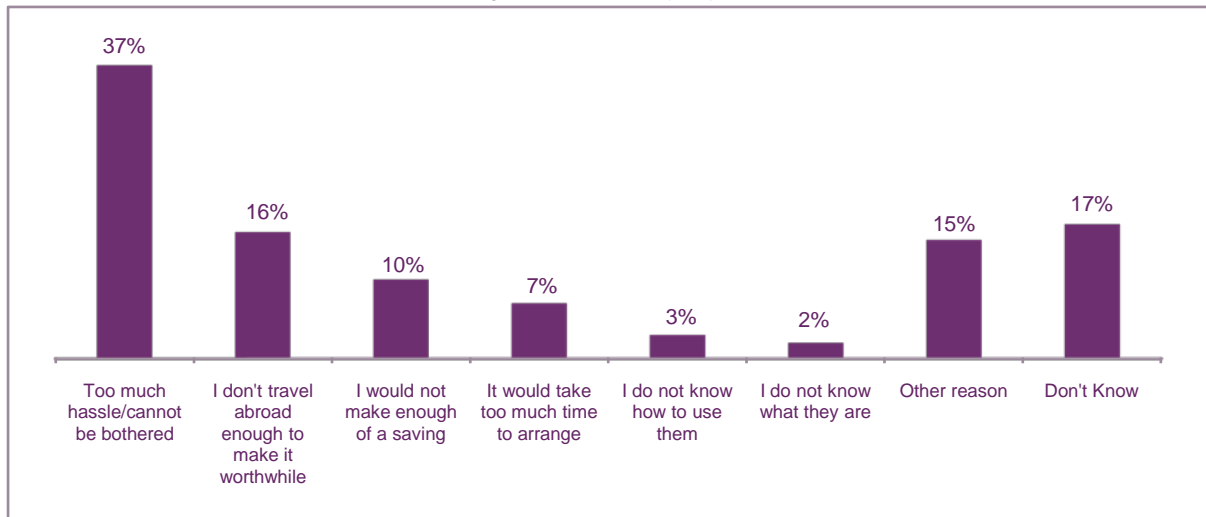


Despite the fact that a quarter of European Roamers said they were aware of the ability to purchase a SIM card in the country visited, this was not a method often employed, with just one in ten of those aware having done so. That said, double this number said that they would consider it in the future (21%).

Respondents who claimed they would not consider any of the methods of reducing roaming costs were asked the reason why. The chart below shows the reasons given; 37% feeling it would be too much hassle, and 16% saying they did not travel abroad often enough to make it worthwhile:

Chart: Reasons why won't consider using methods to reduce costs

Base: All adults in GB who wouldn't consider any of the methods (50*)



7.3 Mobile internet cut-off limit

Summary table		% personal mobile users (Population estimates)
Aware of cut-off limit		15% (6.259m)
		% those aware of cut-off limit (Population estimates)
Satisfaction with the service	Satisfied	56% (3.505m)
	Neither	43% (2.691m)
	Dissatisfied	1% (63,000)
	Don't use mobile phone abroad	10% (269,000)

Awareness

All personal mobile phone owners were asked about their awareness of the mobile internet cut-off limit, which was automatically applied to all consumers from 1st July 2010, in accordance with the EU Roaming Regulation. The description offered to respondents was as follows:

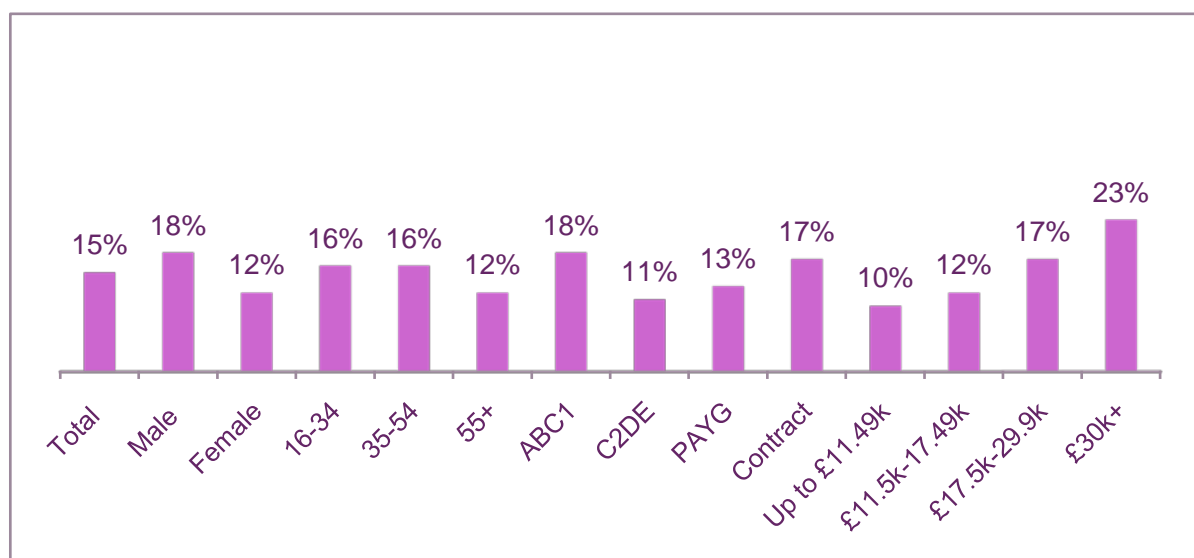
“Recently there has been the introduction of a mobile internet cut-off limit for when customers are in Europe, where mobile operators must inform customers when they are close to reaching €50 per month spend on mobile internet. Unless the customer re-authorises their connection, the operator must stop providing and charging for the service when the limit is met”.

Fifteen per cent of personal mobile owners said they were aware of this facility, doubling to 30% among those who said they used the internet on their mobile phone abroad. Only 3% claimed that they were aware of it and had also experienced it while abroad.

Awareness among some of the key groups (sex, age, social grade, service type and annual income) is displayed in the following chart:

Chart: Awareness of mobile internet cut-off limit

Base: All adults in GB who use their mobile for personal use (1649)

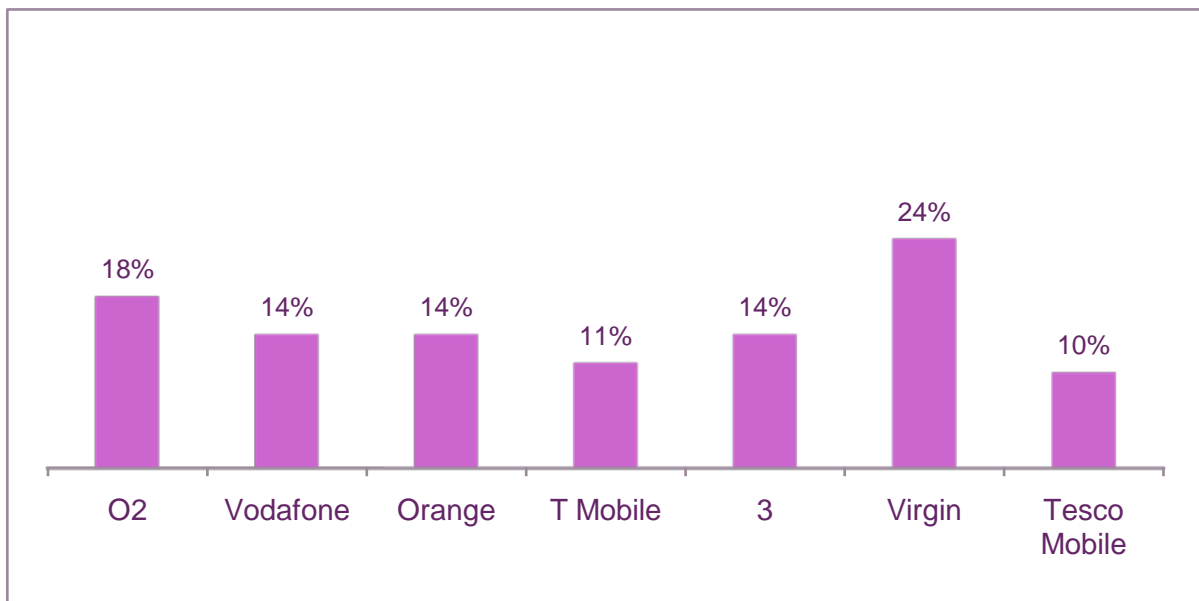


Awareness increased according to income, with those earning £30K+ being most aware (23%). Males (18%) were more likely to have heard of it than females (12%), and contract customers (17%) were more likely than PAYG customers (13%). It is fair to assume that contract/higher spending customers are more likely to be using data services, and this may help to explain higher awareness of the mobile cut-off limit.

Across the various networks, awareness correlates with the proportion of European Travellers on that particular network (as covered in the previous section). For example, Virgin Mobile customers, which had the highest incidence of European Travellers, also had the highest awareness of the cut-off limit (close to one in four). Similarly, Tesco Mobile, which had the lowest incidence of European Travellers, also had the lowest awareness (one in ten).

Chart: Awareness of mobile internet cut-off limit, by network

Base: All adults in GB who use their mobile for personal use (1649)

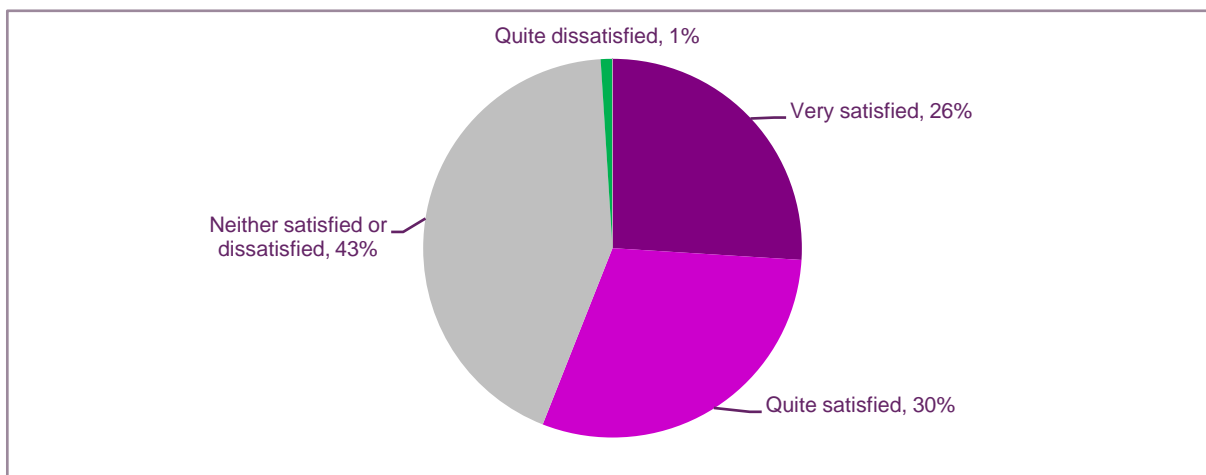


Satisfaction with the cut-off-limit

Of those who were aware of the limit, more than half (56%) said they were satisfied with it, just over a quarter (26%) of whom stated they were 'very satisfied'. Encouragingly, only 1% claimed they were quite dissatisfied and no-one claimed to be very dissatisfied.

Chart: Satisfaction with mobile internet cut-off limit

Base: All who are aware of the cut-off limit (227)



Satisfaction (the combined total of 'very' and 'quite' satisfied) was highest among 16-34 year olds (67%), compared to 41% of 55+s. On the other hand, PAYG customers expressed higher satisfaction (54%) than contract customers (42%).

Table: % of those aware who expressed satisfaction with the mobile internet cut-off-limit

Total (227)	16-34 (80*)	35-54 (82*)	55+ (65*)	PAYG (108)	Contract (119)
56%	67%	55%	41%	54%	42%

The reasons given for satisfaction were varied (as this was an open-ended question) but the most common responses were that it stopped 'large bills' (11%) and 'overspending' (10%), 'it's a good idea' (9%) and it 'keeps customers informed' (9%).

A further 43% had no opinion one way or the other about the facility, although the main reason was because they didn't use mobile internet abroad (53% of those aware of the cut-off limit).

8. The questionnaire

SECTION 1: Use of mobile, tariff, network

ASK ALL

Q1. Which of the following do you have?

READ OUT, SINGLE CODE

1. A mobile phone for your personal use
2. A mobile phone provided and paid for by your company – **CLOSE**
3. Both a mobile phone for your personal use and a mobile phone provided and paid for by your company
4. None of these – **CLOSE**

NOTE: Only qualify if coded 1 or 3

READ OUT: For the following questions I would like you only to think about your personal mobile phone and not the mobile provided to you by your company

ASK ALL WHO HAVE A MOBILE PHONE FOR PERSONAL USE (CODES 1 & 3 AT Q1)

Q2. Which of these best describes the mobile package you use most often for personal use?

SINGLE CODE, SHOW SCREEN

Prepay/ Pay as you go

Post pay/ monthly contract

Other (*please state*)

Don't know

Q3. Which mobile phone network do you use most often for personal use?

SINGLE CODE, SHOW SCREEN

O2

Vodafone

Orange

T-Mobile

'3'

Virgin

Tesco Mobile

Other (*please state*)

Don't know

Q3b. And how long have you been with [INSERT NAME FROM Q3]? Is it...

SINGLE CODE

Less than a year

Between a year and two years

Between two years and five years

More than five years

Don't Know/Can't remember

Q4. Why did you choose [INSERT NAME FROM Q3] as your mobile phone network? PROBE:

Why else? IF MENTION COST, PROBE: What was it specifically about the cost? THEN PROBE:

Why else other than cost?

MULTICODE, DO NOT PROMPT

COST

The amount of minutes / texts included in the package

The cost of calls / texts



Free calls to friends / family on the same network
Low rate international calls to some countries
Free evening and weekend calls
The cost of using my phone when abroad
Low cost calls to 08/ 09 numbers
Cost of handset

SERVICE

Reliability of service
Geographic coverage in the UK
Experience of supplier in mobile telephone service
Trusted/well-known brand/company
Dissatisfaction with services from other mobile supplier
Good customer service
Best quality of mobile service

HANDBSET

Free handset
Type/brand of handset

OTHER

Length of the contract
Good combined deal with broadband
Notification when close to contract limit
Notification when close to end of credit

Recommended by friends/family
Same network as friends and family
Did not make the decision **[SINGLE CODE, GO TO Q11]**
Other (*please state*)
Don't know

ASK IF MADE THE DECISION AT Q4 i.e. excludes those who "did not make the decision"

Q5. And which of the following aspects did you consider when choosing your network?

MULTICODE, SHOW SCREEN

The amount of minutes / texts/ mobile internet included in the package
Cost of monthly tariff (pay monthly only)
Cost of calls and text messages
Cost of calls while abroad
Cost of text messages while abroad
Cost of using mobile internet while abroad
Reliability of the service
Geographic coverage in the UK
Being on the same network as friends/family
Network customer service
Type of handset
Cost of handset
None of these
Don't know

ASK ALL WHO GAVE MORE THAN ONE ANSWER AT Q5. IF GAVE 1 ANSWER ONLY, AUTOMATICALLY CODE AS MOST IMPORTANT.

Q6a/b/c. And which of these was the most important? And the second most important? And the third? <IF MENTIONED MORE THAN TWO AT Q5>

[INSERT ANSWER CODES FROM Q5, SINGLE CODE]

ASK ALL NOT MENTIONED COST OF CALLS ABROAD AS FIRST, SECOND, THIRD AT Q6



Q7. When you chose your network, how important to you was the cost of calls while abroad?
SINGLE CODE, SHOW SCREEN

ASK ALL NOT MENTIONED COST OF SENDING/ RECEIVING TEXT MESSAGES ABROAD AS FIRST, SECOND, THIRD AT Q6

Q8. When you chose your network, how important to you was the cost of text messaging while abroad?
SINGLE CODE

ASK ALL NOT MENTIONED COST OF USING MOBILE INTERNET ABROAD AS FIRST, SECOND, THIRD AT Q6

Q9. When you chose your network, how important to you was the cost of using the internet on your phone while abroad?
SINGLE CODE, SHOW SCREEN

	Q7. Cost of calls when abroad	Q8. Cost of text messaging when abroad	Q9. Cost of mobile internet when abroad
Very important			
Fairly important			
Neither important nor unimportant			
Fairly unimportant			
Very unimportant			
Don't know			

ASK ALL SAID FAIRLY/ VERY UNIMPORTANT AT Q7, Q8 AND/OR Q9

Q10 You say that the [cost of calls], [cost of text messages], [cost of using mobile internet] when abroad was not important when choosing a mobile network. Why is that?

MULTICODE OK, DO NOT READ OUT

- a) Never travel abroad – **[SINGLE CODE, GO TO Q27]**
- b) Rarely travel abroad
- c) I NEVER use my mobile for making/receiving calls
- d) I NEVER use my mobile for text messaging
- e) I NEVER use mobile internet on my mobile phone
- f) I NEVER use my mobile while I am abroad
- g) Don't/ rarely use my mobile for making calls while I am abroad
- h) Don't/rarely use my mobile for text messaging while I am abroad
- i) Don't /rarely use my mobile for mobile internet while I am abroad
- j) Wasn't sure if, when and how long I was going to be abroad
- k) Wasn't sure I would need to use my phone while abroad
- l) Other aspects were more important
- m) Didn't know I could use mobile abroad
- n) Didn't think about it
- o) My mobile supplier did not clearly advertise the costs of using my phone in different countries
- p) Someone else pays the bill
- q) Other (*please state*)
- Don't know



SECTION 2: Travel abroad to EU, Norway and Iceland

ALL WHO HAVE A PERSONAL MOBILE AND TRAVEL ABROAD

Q11. Roughly how many times a year do you travel outside of the UK, to any of the following European countries for...?

- a) **Holidays or leisure**
- b) **Work**

DISPLAY FOLLOWING LIST OF COUNTRIES

Austria
Belgium
Bulgaria
Cyprus
Czech Republic
Denmark
Estonia
Finland
France
Germany
Gibraltar
Greece
Hungary
Iceland
Ireland
Italy
Latvia
Lithuania
Luxembourg
Malta
Netherlands
Norway
Poland
Portugal
Romania
Slovakia
Slovenia
Spain
Sweden

SINGLE CODE, SHOW SCREEN

Once a year
Twice a year
3-4 times a year
5-6 times a year
7-10 times a year
More than 10 times a year
Never **[IF SELECTED 'NEVER' AT HOLIDAYS OR LESIURE AND WORK GO TO Q27]**
Don't know

READ OUT: From now on when we ask about mobile phone usage in Europe we are referring to any of the previously listed countries you have travelled to

SECTION 3: Use of mobile phone abroad

ASK ALL PERSONALLY USE MOBILE AND HAVE NOT SAID AT Q10 THEY DO NOT USE THEIR MOBILE FOR Q12A, CALLS/ Q12B, TEXT MESSAGING/ Q12C MOBILE INTERNET

Q12 And do you use your mobile phone when you are outside the UK in Europe for the following?



A	Calls	Yes	No- GO TO Q14
B	Text messaging	Yes	No- GO TO Q16
C	Mobile internet	Yes	No- GO TO Q18

IF YES AT Q12A, USE MOBILE FOR CALLS WHEN IN EUROPE

Q13. Thinking only about personal calls (i.e. not including any work- related calls) when you are in Europe, how often do you tend to use your mobile phone compared to when you are at home in the UK? Is it...

SINGLE CODE

- A lot more
- A little more
- About the same
- A little less
- A lot less
- Never
- Don't know

ASK ALL USE THEIR MOBILE FOR CALLS LESS OR NEVER AT Q13 (CODES 4-6) OR NO AT Q12A

Q14. Why [do you use your mobile phone less] / [don't you use your mobile phone] to make calls when you are in Europe?

MULTICODE, UNPROMPTED

- Can't use my mobile phone to make calls in Europe
- Did not know could use mobile to make calls in Europe
- No need to make calls when abroad
- Don't travel to Europe often enough
- Only take short trip(s)

- Too expensive to use abroad in Europe
- I'm on holiday/ like privacy/ not being contactable when abroad
- Use someone else's mobile
- Use other methods of communicating with my mobile, such as sending a text or email on my mobile phone
- Use email over local Wifi
- Use VoIP over local Wifi
- Use email on a local computer instead
- Use payphones instead
- Other (specify)
- Don't know

IF YES, USE MOBILE FOR TEXT MESSAGING WHEN IN EUROPE

Q15. And thinking only about personal text messages (i.e. not including any work- related text messages) when you are in Europe, how often do you tend to send text messages compared to when you are at home in the UK? Is it...

SINGLE CODE

- A lot more
- A little more
- About the same
- A little less
- A lot less
- Never
- Don't know



ASK ALL USE THEIR MOBILE FOR TEXT MESSAGING LESS OR NEVER AT Q15 (CODES 4-6)
OR NO AT Q12B

Q16. Why [do you use your mobile phone less] / [don't you use your mobile phone] **for text messaging?**

MULTICODE, UNPROMPTED

Can't use my mobile phone for texting in Europe
Did not know you could use mobile for texting in Europe
No need to use texting when abroad
Don't travel to Europe often enough
Only take short trip(s)

Too expensive to use abroad in Europe
I'm on holiday/ like privacy/ not being contactable when abroad
Use someone else's mobile
Use other methods of communicating with my mobile, such as calling or email
Use email on a laptop that I take with me
Use email over local Wifi
Use VoIP over local Wifi
Use payphones instead
Other (specify)
Don't know

IF YES, USE MOBILE FOR MOBILE INTERNET WHEN IN EUROPE AT Q12C

Q17. And thinking only about using the internet on your mobile phone (not including any work-related use) when you are in Europe, how often do you tend to use the internet on your mobile phone compared to when you are at home in the UK?

SINGLE CODE

A lot more
A little more
About the same
A little less
A lot less
Never
Don't know

ASK ALL USE THEIR MOBILE FOR MOBILE INTERNET LESS OR NEVER WHEN IN EUROPE AT Q17 (CODES 4-6) OR NO AT Q12C

Q18. Why [do you use your mobile phone less] / [don't you use your mobile phone] **for mobile internet/data services when you are in Europe?**

MULTICODE, UNPROMPTED

Can't use my mobile phone for internet in Europe
Did not know could use mobile for internet in Europe
No need to use when abroad
Don't travel to Europe often enough
Only take short trip(s)

Too expensive to use abroad in Europe
I'm on holiday/ like privacy/ not being contactable when abroad
Use someone else's mobile
Use other methods of communicating with my mobile, such as calling or texting
Use email over local Wifi
Use VoIP over local Wifi
Use email on a local computer instead
Use payphones instead
Other (specify)



Don't know

SECTION 4: Costs of calls abroad

ASK ALL WHO MAKE CALLS IN EUROPE (Q12A= YES)

Q19. Thinking about the last time you made a call on your mobile phone in Europe, how much was the actual cost of the call compared to what you expected? Was it...

SINGLE CODE

- A lot more than expected
- A little more than expected
- About the same as expected
- A little less than expected
- A lot less than expected
- Don't know

ASK ALL WHO SENT SMS IN EUROPE (Q12B= YES)

Q20. Thinking about the last time you sent a text message on your mobile phone in Europe, how much was the actual cost of the text message compared to what you expected? Was it...

SINGLE CODE

- A lot more than expected
- A little more than expected
- About the same as expected
- A little less than expected
- A lot less than expected
- Don't know

ASK ALL WHO USED MOBILE INTERNET IN EUROPE (Q12C= YES)

Q21. Thinking about the last time you used the internet on your mobile phone in Europe, how much was the cost compared to what you expected? Was it...

SINGLE CODE

- A lot more than expected
- A little more than expected
- About the same as expected
- A little less than expected
- A lot less than expected
- Don't know

SECTION 5: Actions taken to reduce roaming cost

ASK ALL PERSONALLY USE MOBILE ABROAD (Q12A/B/C= YES)

Q22. Can you tell me whether or not you were already aware of these ways of reducing the cost of using your mobile abroad?

SHOW SCREEN CODE EACH AWARE

- Changing to another UK mobile network offering cheaper rates in Europe
- Changing my tariff with my existing network
- Using an international SIM card in my phone to get cheaper rates while I'm abroad
- Buying a SIM card in the country I am visiting
- Using a local WiFi hotspot instead of mobile Internet
- Using a VoIP service such as Skype, which allows you to make calls over the internet instead of making a mobile phone call
- Sending a text instead of making a call
- Turning off automatic updates to emails and applications i.e. Push notifications
- None of these – DO NOT INCLUDE ON SHOW SCREEN

ASK ALL AWARE OF METHODS AT Q22

Q23 which, if any, of these methods have you used to reduce the cost of using your mobile when you are in Europe?

CODE EACH USED



ASK ALL AWARE OF METHODS AT Q22

Q24. Which, if any, of these methods are you likely to consider using next time you are in Europe?

CODE EACH CONSIDERED – INCLUDING THOSE ALREADY USED TO ASSESS IF WILL USE THEM AGAIN

ASK ALL WHO SAID “NONE OF THESE” AT Q24

Q25 Overall, why would you not consider using the other methods listed? MULTICODE, DO NOT PROMPT

It would take too much time to arrange
Too much hassle/ cannot be bothered
I would not make enough of a saving
I don't travel abroad enough to make it worthwhile
I do not know what they are
I do not know how to use them
Other (*please state*)
Don't know

SECTION 6: Satisfaction with using mobile phone abroad

ALL ADULTS IN GB WHO USE THEIR MOBILE PHONE ABROAD (ALL WHO SAID YES AT Q12A OR Q12B OR Q12C)

Q26. Thinking about when you travel to Europe, please tell me the extent to which you agree or disagree with the following statements:

SINGLE CODE, SHOW SCREEN

Strongly agree
Agree
Neither agree nor disagree
Disagree
Strongly disagree
Don't know

ROTATE AND RANDOMISE ORDER

- I tend to make fewer calls on my mobile phone than if I was in the UK
- I tend to keep calls on my mobile phone shorter than if I was in the UK
- I am concerned about the cost of using my mobile when I am in Europe
- Over the last couple of years, it has become cheaper to use my mobile when I am in Europe
- Over the last couple of years, it has become easier to find out information about the cost of using my mobile in Europe
- It is easy to find information on the cost of using my mobile when in Europe

ASK ALL

Q27. Recently there has been of the introduction of a mobile internet cut off limit for when customers are in Europe where mobile operators must inform customers when they are close to reaching €50 per month spend on mobile internet. Unless the customer re-authorises their connection, the operator must stop providing and charging for the service when the limit is met. Were you aware of this before now?

PROBE: IF ANSWER YES...Have you experienced it while abroad?

- Yes, aware of a cut of limit and experienced it while abroad
- Yes, aware of a cut off limit but not experienced it while abroad
- No, not aware before now

IF YES, AWARE AT Q27

Q28 And how satisfied are you with this service?

SINGLE CODE, SHOW SCREEN



Very satisfied
Quite satisfied
Neither satisfied or dissatisfied
Quite dissatisfied
Very dissatisfied

Q29 Why do you say that?

[OPEN ENDED]

ASK ALL

Q30. Approximately how much do you spend each month on your main mobile phone network? Please include the cost of VAT, your subscription, calls, text and photo messaging, and Internet type services.

SINGLE CODE, SHOW SCREEN

Up to £5
£6-£10
£11-£20
£21-£30
£31-£40
£41-£50
£51-£100
More than £100
Don't know

