

Roaming

Fieldwork September – October 2006

Publication March 2007

This survey was requested by Directorate General INFORMATION SOCIETY AND MEDIA and coordinated by Directorate General COMMUNICATION

This document does not represent the point of view of the European Commission. The interpretations and opinions contained in it are solely those of the authors.

PRESENTATION	2
MAIN FINDINGS	3
1. EUROPEANS AND MOBILE PHONES	4
1.1. Mobile phones	4
1.2. Pre-paid cards versus contract-based subscriptions	7
2. THE USE OF MOBILE PHONE SERVICES BY EUROPEANS WHEN TRAVELLING ABROAD	9
2.1. The use of mobile phones abroad	9
2.2. The type of mobile services Europeans use when travelling abroad	17
2.3. The frequency with which European use their mobile phone when travelling abroad.....	19
3. WHAT EUROPEANS SEE AS THE MAIN OBSTACLE TO THE USE OF MOBILE PHONE SERVICES ABROAD	21
3.1. Main reasons why Europeans use their mobile phone less frequently when abroad	21
3.2. The impact of cost on use.....	24
4. THE EU'S ROLE IN THE MOBILE PHONE SECTOR	30
4.1. Lack of knowledge of international roaming charges	30
4.2. The European Union's role.....	33
ANNEX	
Technical note	
Tables of results	
Questionnaire	

PRESENTATION

To overcome the last remaining barriers of the single market for mobile communications, since the end of the 1990s, the European Commission has been looking closely at the level of roaming charges in the European Union. During that time it has launched several initiatives, on the one hand, to encourage operators to reduce their prices for such services and, on the other hand, to provide mobile phone users with more transparency on roaming charges¹.

In light of the high cost of international communications, the European Commission has been requested by the European Parliament, the national telecom regulatory authorities and consumer organisations to take further action² in order to reduce and harmonise prices within the European Union. The most recent initiative is a proposed European regulation intended to ensure that tariffs for international communications are not arbitrarily higher than those for calls in the mobile phone user's home country.

In order to evaluate how Europeans perceive international roaming charges and also the extent to which they use mobile communication services when travelling abroad, the Directorate-General for Information Society and Media has commissioned **this Eurobarometer study**, which was carried out between September and October 2006 by TNS Opinion & Social among 24,565 people in the 25 Member States.

This report addresses the following topics:

- ⇒ the penetration rate of mobile phones;
- ⇒ the use of international roaming;
- ⇒ how EU citizens perceive international roaming charges;
- ⇒ the EU's role in the mobile phone sector.

For each of the above topics, the results are analysed on the basis of the European average, then examined country by country. When relevant, the socio-demographic differences (in particular as regards the age and level of education of respondents) are noted.³ Our analysis also presents additional categories, which enables us to highlight the parameters which influence the views of respondents on international roaming.

The study was carried out between 6 September and 10 October 2006. Further details regarding the methodology can be found in the technical note, which also describes the interview methods, as well as the intervals of confidence.

¹ For more information on examples of mobile phone tariffs in the European Union, please visit: http://europa.eu.int/information_society/activities/roaming/tariffs/index_en.htm

² For detailed information, please consult http://ec.europa.eu/information_society/doc/factsheets/059-roaming-en.pdf

³ In certain cases, the totals indicated may show a one point difference with the sum of the individual figures. It should also be noted that the total of the answers may exceed 100% when the respondent has the option of giving several answers.

MAIN FINDINGS

There seems to be a clear need for citizens to be able to communicate at all times wherever they may be in the European Union, given that **almost eight out of ten Europeans have a mobile phone**. More than half of those use their mobile phone while abroad.

The Eurobarometer survey highlights the fact that **mobile phone users rely very heavily on international roaming services, since nine out of ten users opt for that formula when travelling abroad**, compared with a very small minority who prefer to buy a new SIM card in the country they are visiting.

At the same time, the use of international roaming services, and in particular the frequency with which mobile phone owners use mobile communication services is limited: **a clear majority of users limit their mobile communications when travelling abroad**.

The survey demonstrates clearly that excessive communication costs are by far (81%) the main reason why Europeans use their phone less often when travelling abroad.

Moreover, almost six out of ten Europeans would be ready to use their mobile phone more frequently when travelling abroad if prices were more attractive.

In this context, does the European Union have a role to play, in particular as regards regulating communication tariffs? First of all, **this survey reveals a considerable lack of transparency as regards prices**, since more than four out of ten Europeans do not have a clear idea of the cost of calls abroad.

However, when respondents were asked to compare the cost of calls abroad with the price of calls at home, a majority of Europeans – both users and non-users of international roaming services – **declared that the charges for using their mobile phone abroad are higher, if not excessive.**

This perception that there is a real imbalance between the cost of mobile communication services at national and international levels is undoubtedly the reason why a clear majority of Europeans (70%) want the European Union to take action to regulate the price of calls and text messages, so that international roaming charges are not unreasonably higher than local prices. This support for EU action is far greater among those in the youngest age group, who can be characterised as the "mobile phone generation": the percentage of them having a mobile phone is above the European average, they travel abroad as often as seniors, and they are more likely to limit their use of mobile phone services when travelling abroad because of high international roaming charges.

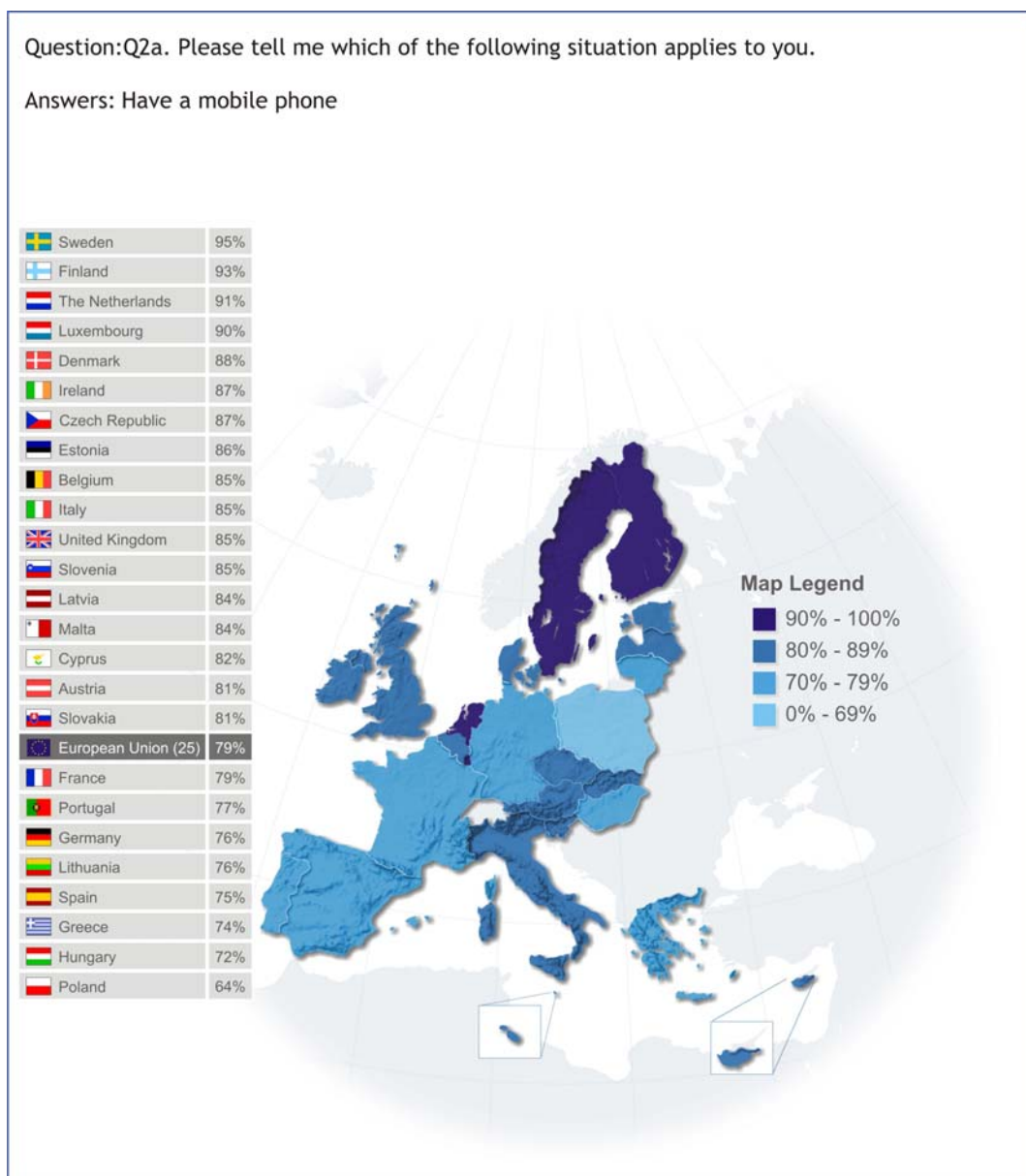
1. EUROPEANS AND MOBILE PHONES

1.1. Mobile phones

*- In each Member State,
an absolute majority of the people interviewed has a mobile phone -*

Questionnaire source: QB2a

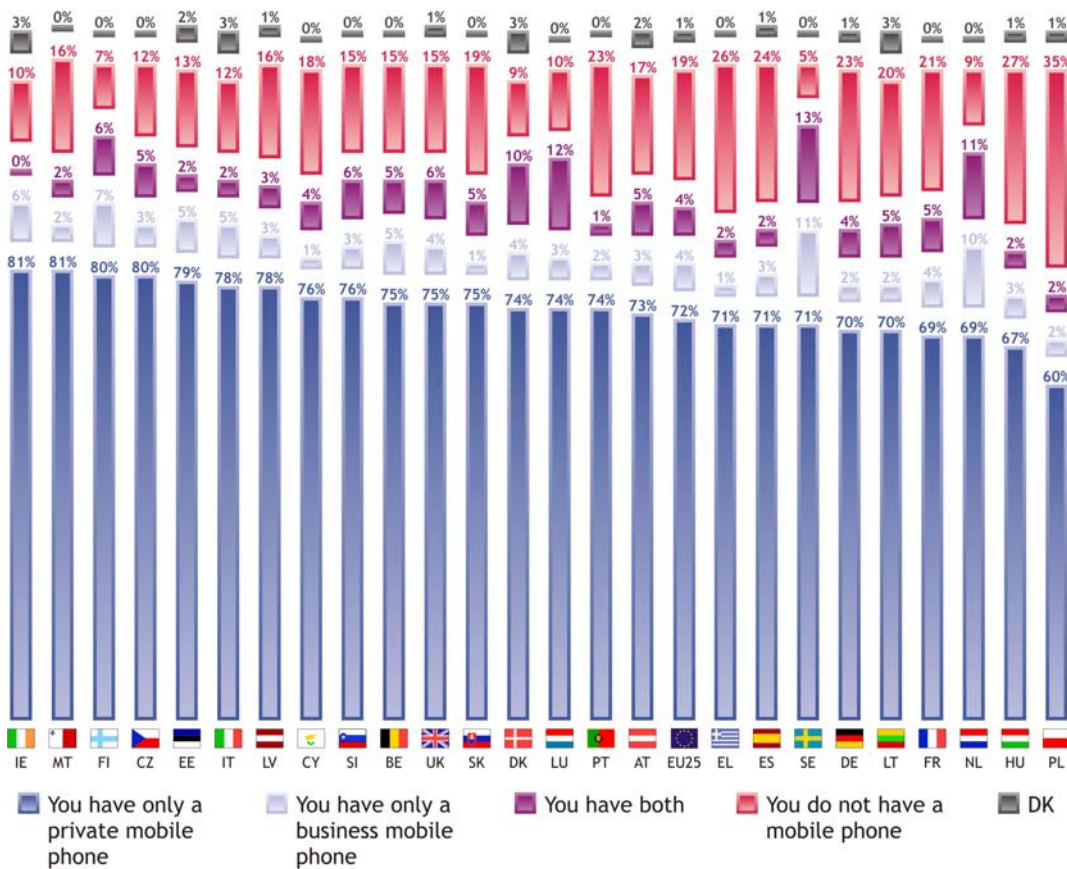
The map below shows the percentages of citizens having either a private or business mobile phone. **Almost eight out of ten Europeans (79%) have a mobile phone.** For the vast majority it is a private mobile phone (76%). Only 8% of European citizens have a business mobile phone.



Almost all citizens in Sweden, Finland and the Netherlands have a mobile phone (more than 90% in each of these countries). On the other hand, far fewer citizens have a mobile phone in Poland, Hungary and Greece (less than 75%).

The countries having the highest number of citizens with a private mobile phone are not, however, the same as those having the most citizens with a business mobile phone. In Ireland, Malta, Finland and the Czech Republic in particular, eight out of ten citizens have only a private mobile phone. Moreover, citizens in Sweden (11%) and the Netherlands (10%) are the most likely to have only a business mobile phone. Finally, citizens in Sweden (13%), Luxembourg (12%), the Netherlands (11%) and Denmark (10%) are the most likely to have both types of phones.

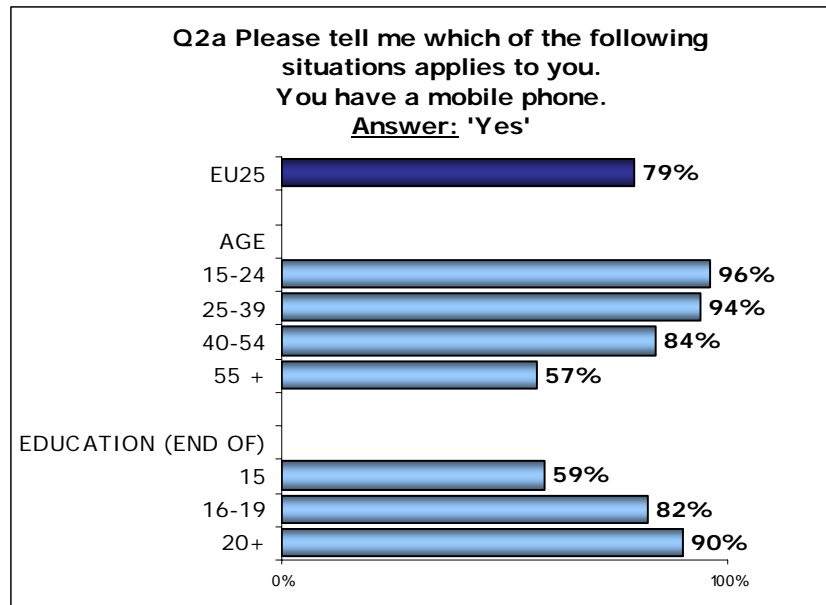
Question: Q2a. Please tell me which of the following situation applies to you.



Base the whole sample

Socio-demographic analysis:

There are considerable differences depending on the respondent's age, level of education and occupation. The younger the respondents and the longer they studied, the more likely they are to have a mobile phone. It is noteworthy, however, that a large number of seniors also own a mobile phone: more than one in two Europeans aged 55 and over has a mobile phone.



Logically, as regards business mobile phones, the interviewee's occupation has a determining impact: self-employed respondents as well as top managers are more likely to have a business mobile phone (26% and 25% respectively compared with the European average of 8%).

1.2. Pre-paid cards versus contract-based subscriptions

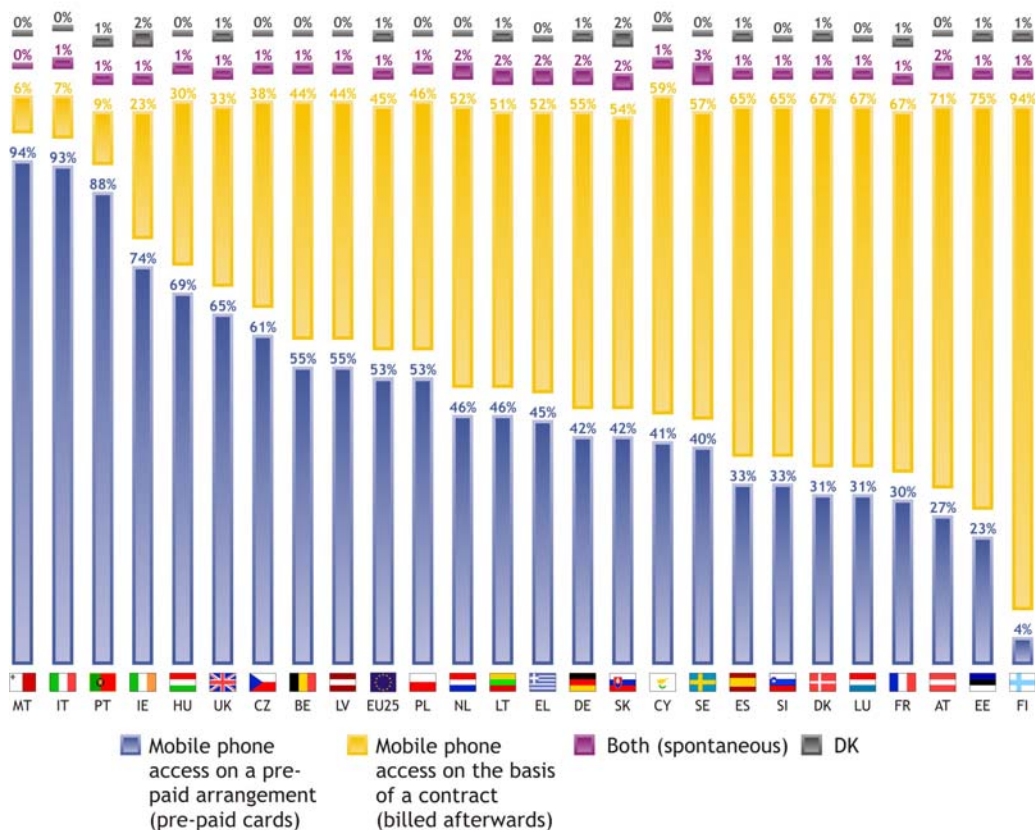
- Means of access: national specificities -

Questionnaire source: QB2b

People owning a mobile phone were also asked about their means of access to mobile phone services, i.e. pre-paid cards or a contract-based subscription.

The majority use pre-paid cards (53%), while the contract formula with billing afterwards is relatively less popular (45%).

Question: Q2b. And do you have a mobile phone access on the basis of a contract (billed afterwards) or on a pre-paid arrangement (pre-paid cards)?

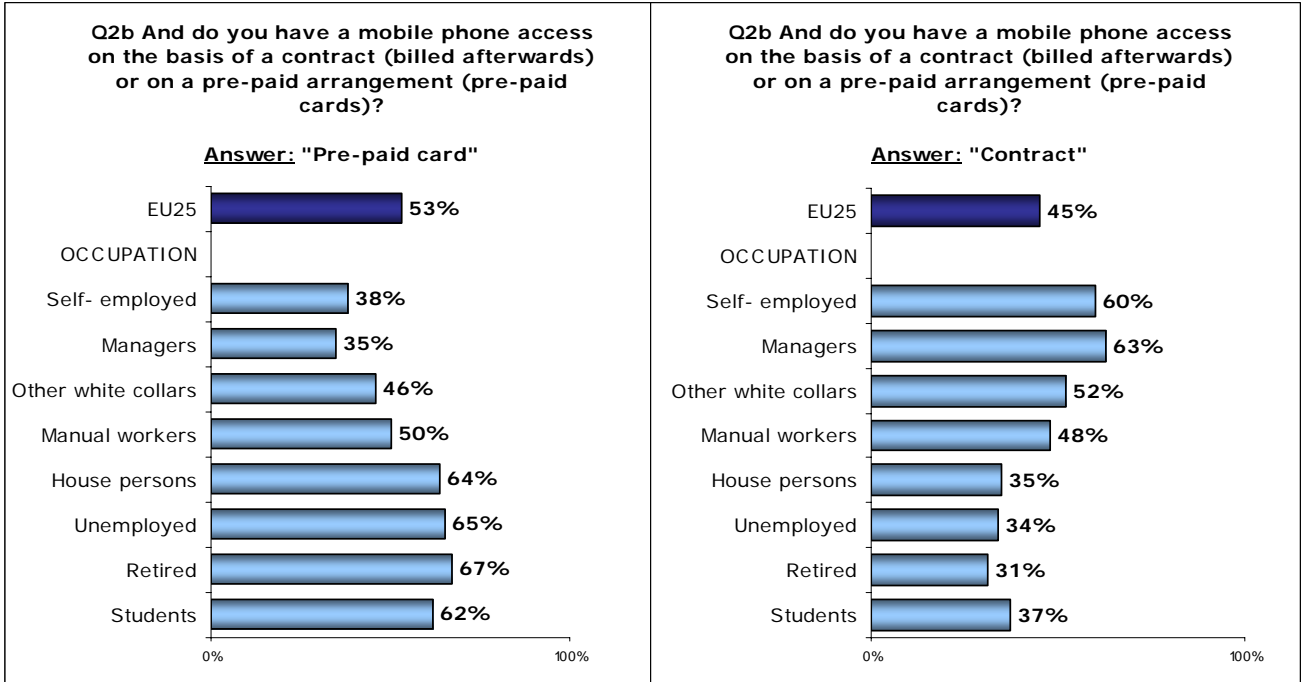


Base: respondents having a mobile phone (79% of the total sample)

The results vary considerably from one country to the next. Contract-based subscriptions are particularly popular in Finland (94%) and, to a lesser extent, in Estonia (75%) and Austria (71%). On the other hand, pre-paid cards are particularly widespread in certain Mediterranean countries, being used notably by the vast majority of citizens in Malta (94%), Italy (93%) and Portugal (88%).

Socio-demographic analysis:

As can be seen from the following charts, the respondent's occupation influences whether he or she chooses a pre-paid card or a contract-based subscription. Pre-paid cards are particularly popular with inactive people and students, while managers and self-employed people are far more likely to opt for subscriptions (contracts).



The respondent's choice between a pre-paid card and a subscription is also influenced by age and education: subscriptions are particularly popular with those who studied the longest (59% among those who studied up to or beyond the age of 20), while pre-paid cards are mainly chosen by the youngest respondents (60% among those aged 15-24), students (62%), the oldest respondents (63% among those aged 55 and over) and those who left school at 15 (69%).

Subscriptions and pre-paid cards offer citizens different ways of managing their mobile phone budgets. They also differ in terms of constraints, in that the subscription formula ties the user into a contractual obligation over a period of time with a mobile phone operator. This raises the question, therefore, of which of these two factors is determining. We would emphasise, however, that the main variations noted are those between countries.

2. THE USE OF MOBILE PHONE SERVICES BY EUROPEANS WHEN TRAVELLING ABROAD

2.1. The use of mobile phones abroad

- Almost one in two Europeans has travelled within the European Union for personal reasons in the last twelve months -

Questionnaire source: QB3, QB4

Respondents owning a mobile phone were then asked about their visits to other countries during the 12 months preceding the survey. First of all, they were asked to say whether they had visited **another European Union country for private purposes**. The second question concerned **business trips**. Finally, they were also asked whether they had visited **a country outside the European Union**.

Europeans visited another European Union country mainly for private purposes (44%). On the other hand, the proportion of Europeans travelling within the European Union for business purposes was less than a quarter of that figure (10%). Finally, a fifth of people having a mobile phone (21%) visited a country outside the European Union.

Respondents having a mobile phone: (79% of the total sample)				
QB3 In the last 12 months have you ... ?				
	Total Yes	Yes, on several occasions	Yes, once or twice only	No
Visited another EU country for private purposes	44%	16%	27%	56%
Visited another EU country for business purposes	10%	4%	5%	90%
Visited a country outside of the EU	21%	5%	16%	79%

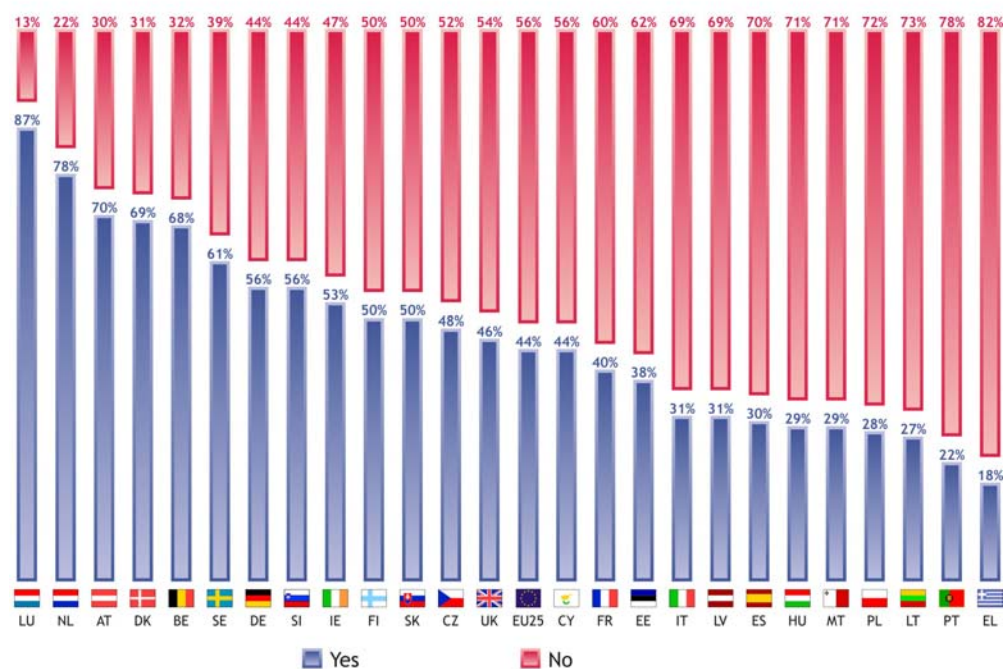
Citizens of the old Member States⁴ seem to be as likely as citizens of the new Member States⁵ to have travelled within the EU for business purposes. On the other hand, EU15 citizens seem to travel abroad more frequently for private purposes.

RESPONDENTS HAVING A MOBILE PHONE (79% of the total sample)		
QB3 In the last 12 months, have you visited another EU country?		
	Yes, for private purposes	Yes, for business purposes
EU25	44%	10%
EU15	45%	10%
NMS10	34%	9%

As regards visits to non-EU countries for private purposes in the last 12 months, there are considerable differences between countries.

Question: Q3_1. In the last 12 months have you...?

Option: Visited another EU country for private purposes



Base: respondents having a mobile phone (79% of the total sample)

⁴ Countries which were already EU members before May 2004 and which we refer to by the abbreviation “EU15”

⁵ Countries which joined the EU at the time of the May 2004 enlargement and which we refer to by the abbreviation “NMS10”

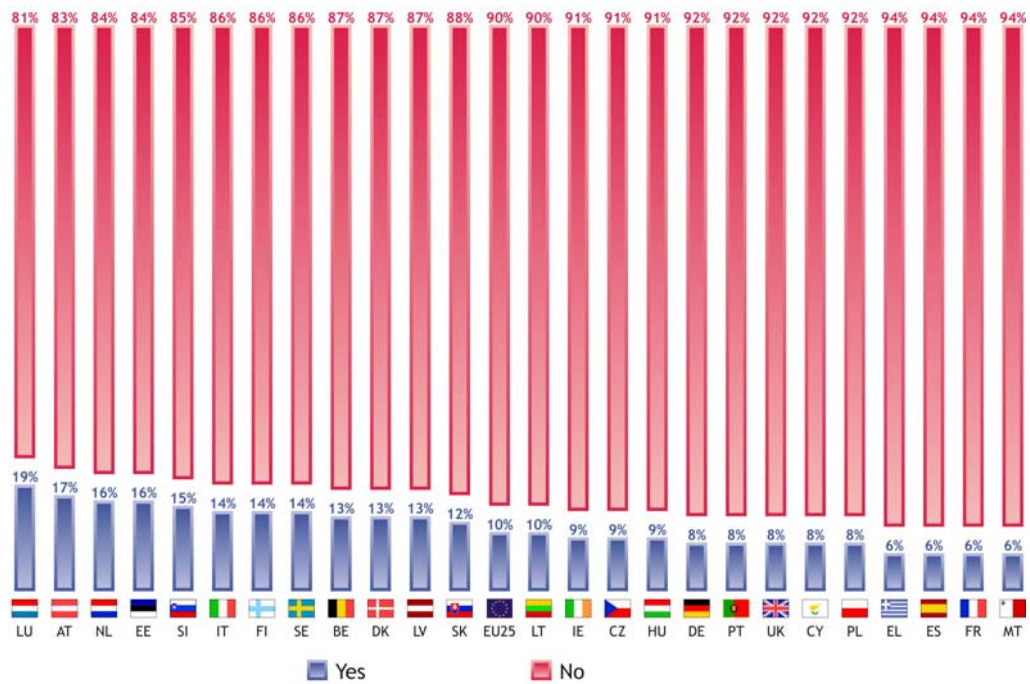
The differences between countries are far less important as regards business trips.

A comparison of the two charts reveals different breakdowns by country depending on whether the respondent travelled for private or business purposes, notably:

- People with a mobile phone in Luxembourg, the Netherlands and Austria are the most likely to have visited another European Union country for both private and business purposes in the last 12 months;
- Citizens in Estonia tend to travel less frequently for private purposes (38%) than Europeans on average (44%), while, to a certain extent, they are more likely to have travelled abroad on a business trip (16%, 6 points higher than the European average);
- On the other hand, although French citizens travelled abroad for private purposes (40%) as frequently as Estonians during the year prior to the survey, respondents in France made fewer business trips abroad (6%) than citizens from other European Union countries.

Question: Q3_2. In the last 12 months have you...?

Option: Visited another EU country for business purposes



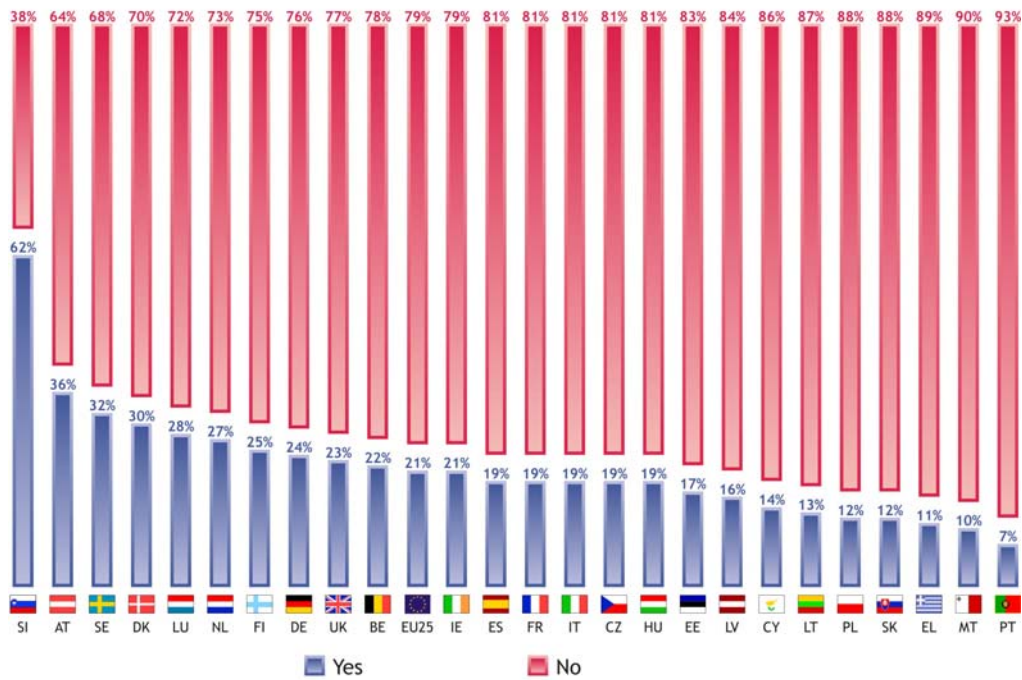
Base: respondents having a mobile phone (79% of the total sample)

We note that business trips were mentioned more frequently by interviewees having a business mobile phone (33%, 23 points above the European average).

Citizens in Slovenia travelled the most frequently outside the European Union (62%, 41 points above the European average). This result is logical given the geographical proximity of Slovenia to non-EU countries. Nevertheless, travelling outside the European Union does not seem to be as popular in all the other countries on the frontier of the European Union – notably in Portugal (7%), Malta (10%), Greece (11%), Slovakia (12%), Poland (12%) and Lithuania (13%).

Question: Q3_3. In the last 12 months have you...?

Option: Visited a country outside of the EU



Base: respondents having a mobile phone (79% of the total sample)

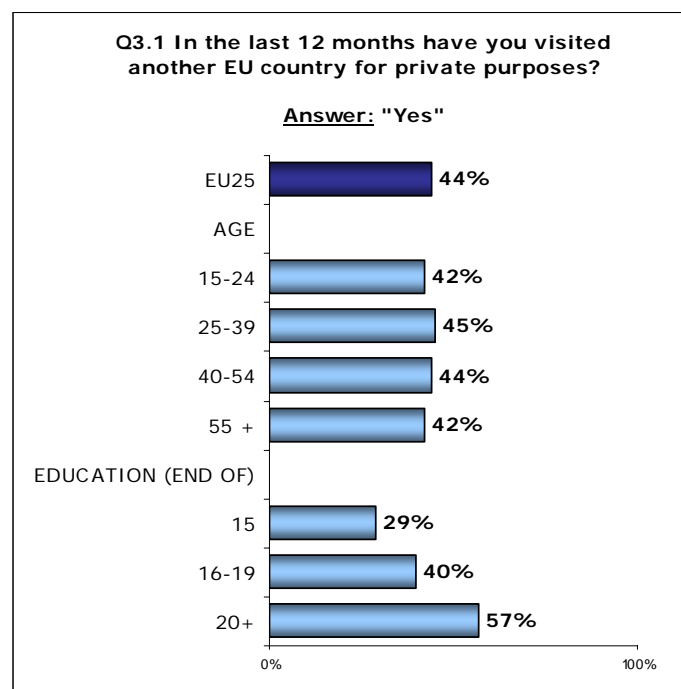
A more in-depth analysis of the results at EU level demonstrates that one in two Europeans has recently travelled abroad. For a relative majority, this involved a visit to another European Union country purely for private purposes.

RESPONDENTS HAVING A MOBILE PHONE: (79% of the total sample)	
QB3 In the last 12 months have you visited another EU country ...?	
Solely for private purposes	35%
Solely for business purposes	1%
For both reasons	8%
Have not visited another EU country	55%
Have not visited either another EU country or a country outside of the EU	50%

Socio-demographic analysis:

A similar number of young people aged between 15 and 24 and seniors in the 55 and over category have visited another European Union country for personal reasons at least once during the last 12 months (42%). However, the two age groups in question do not use their mobile phone with the same regularity.

We note that the respondent's level of education has a significant influence: the longer he or she studied the more likely he or she is to have visited another EU country for private purposes.



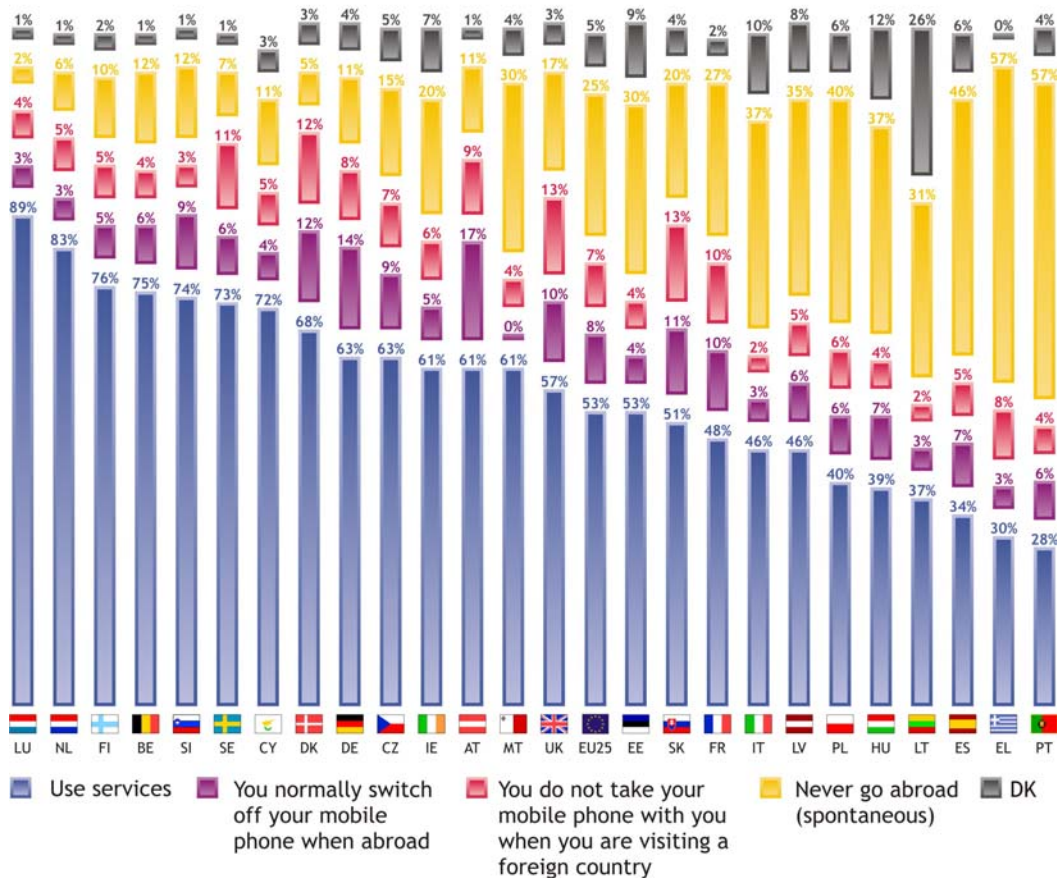
Base: respondents having a mobile phone (79% of the total sample)

As we might have expected, visiting another European Union country for business purposes is mainly mentioned by managers (22%, 12 points above the European average) and self-employed people (21%). It goes without saying that the respondents having studied the longest (16%) are also the most likely to mention this type of visit.

At the same time, and irrespective of whether or not they had visited another country during the twelve months preceding the survey, all respondents having a mobile phone were asked about the mobile communication services they use most frequently when travelling abroad.

The chart below presents the results in condensed form⁶, in order to show the proportion of respondents who use their mobile phone when travelling abroad.

Question: Q4. Which of the following mobile communication services do you use most when you are abroad in another country?



Base: respondents having a mobile phone (79% of the total sample)

⁶ Complete list of services included in the question: making voice calls, receiving voice calls, sending text messages, receiving text messages and advanced mobile communication services.

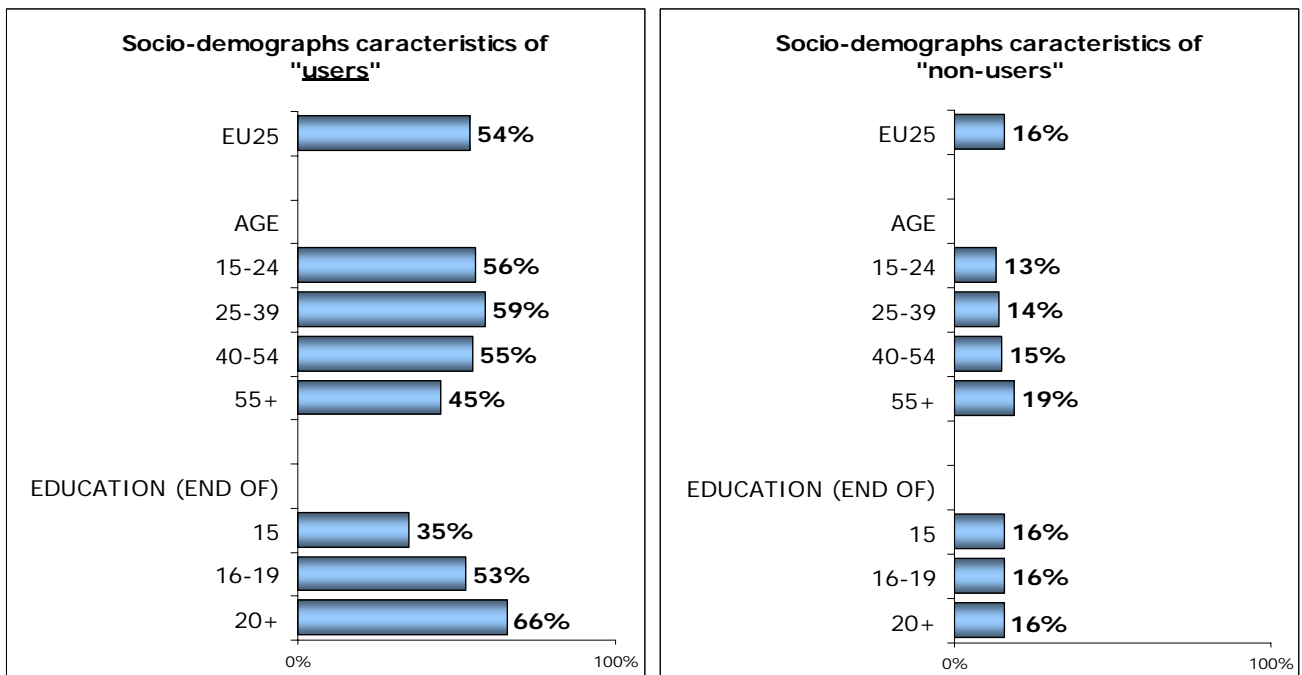
The majority of Europeans who have a mobile phone use it when travelling abroad (53%, or 42% of the total sample). A far lower proportion of Europeans do not use their mobile phone abroad: 8% switch it off and 7% do not take it with them. A quarter of Europeans interviewed replied spontaneously that they never travel abroad.

In order to highlight the different socio-demographic characteristics, the sample as a whole can be divided into 3 separate groups:

- the respondents who use mobile phone services when they travel abroad will be referred to as “users” (43% of the total sample);
- the respondents who switch off or do not take their mobile phone with them when travelling abroad will be referred to as “non-users” (12% of the total sample);
- and the respondents who declared spontaneously that they never travel abroad⁷ will be referred to as “non-travellers” (24% of the total sample).

We note that the “users” group comprises more young respondents and those who studied the longest. As regards the respondent’s occupation, managers and students are over-represented in this group.

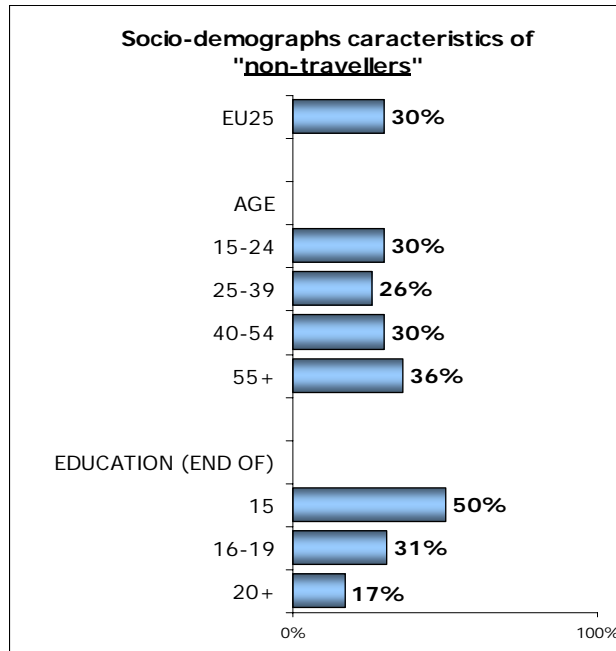
The “non-users” group is fairly heterogeneous in terms of age and education. There are almost as many older people as young people in this group, and there are no discernible differences in terms of the respondent’s level of education.



Base: respondents having a mobile phone (79% of the total sample)

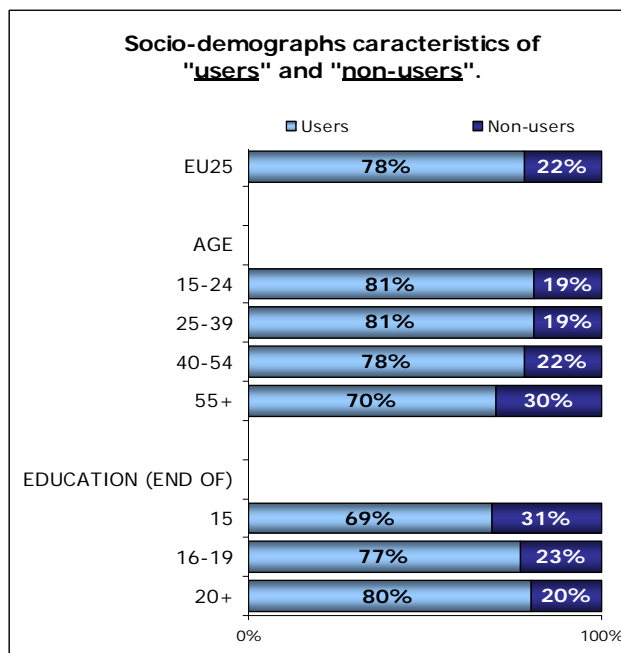
⁷ As well as those who answer « Do not know ».

The "non-travellers" group comprises, on the other hand, more respondents who ended their studies at a relatively young age, but also inactive and older respondents.



Base: respondents having a mobile phone (79% of the total sample)

By analysing solely the group of travellers, we can compare more accurately the socio-demographic characteristics of users with those of non-users. Overall, we note that **eight out of ten travellers use their phones abroad**. Moreover, we can confirm the influence of the respondent's age and education on the use of international roaming: the younger and more educated the respondents, the more they are likely to use their mobile phone when abroad.



Basis: respondents who travel abroad and have a mobile phone (55% of the total sample)

2.2. The type of mobile services Europeans use when travelling abroad

- When travelling abroad Europeans use their mobile phones above all to make and receive voice calls -

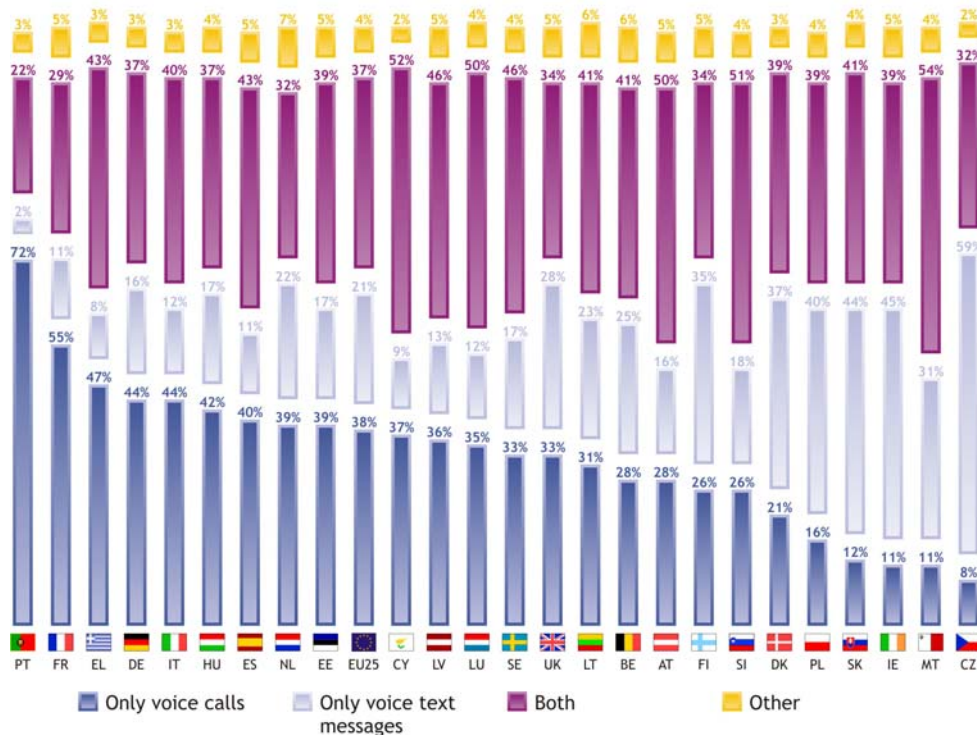
Questionnaire source: QB4

In this sub-chapter, the respondents who use mobile phone services when travelling abroad will be referred to as “users”. Users as a whole can be divided into four categories:

- those using only call services (making and receiving voice calls);
- those using only text services (sending and receiving text messages);
- those using both types of services;
- other users (those using advanced mobile communication services).

The chart below shows the situation for the European Union as a whole:

Question: Q4. Which of the following mobile communication services do you use most when you are abroad in another country?



Base: respondents who use their mobile phone when abroad (42% of the total sample)

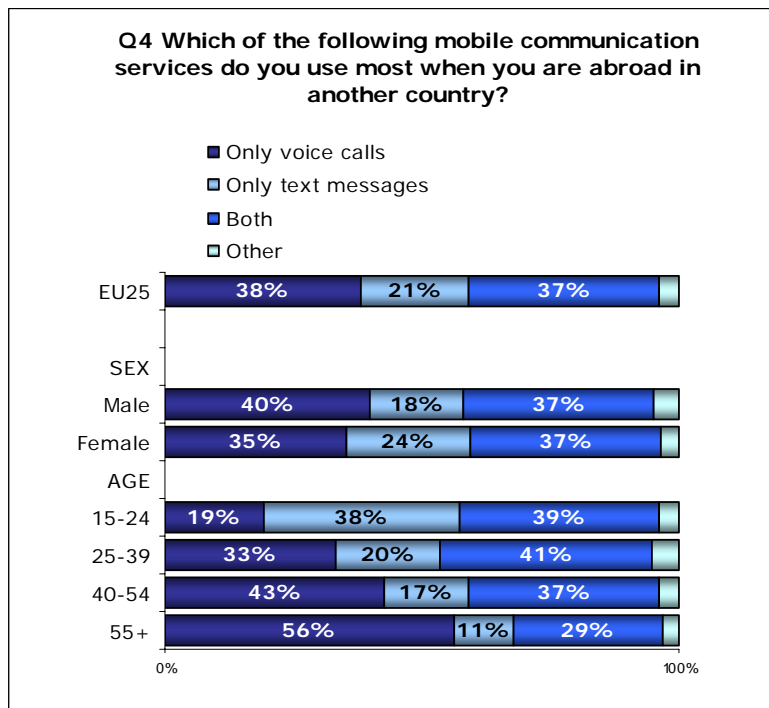
The results show that Europeans have a clear preference for voice services compared with text services: 38% of European users use their mobile phone solely for voice calls when abroad compared with 21% of users who use only text services. Furthermore, 37% of users combine the two types of services.

It is important to emphasise that the results are specific to each country. While more than one in two users in Portugal and France use only voice services, the situation in the Czech Republic is the opposite, since 59% of users use only text services when abroad.

Socio-demographic analysis:

The socio-demographic analysis reveals significant differences. While men seem to have a preference for voice calls, the number of women sending text messages is above the average.

The younger the respondents the more likely they are to opt for text services. Also, the use of voice services increases with age.



Base: respondents who use their mobile phone when abroad (42% of the total sample)

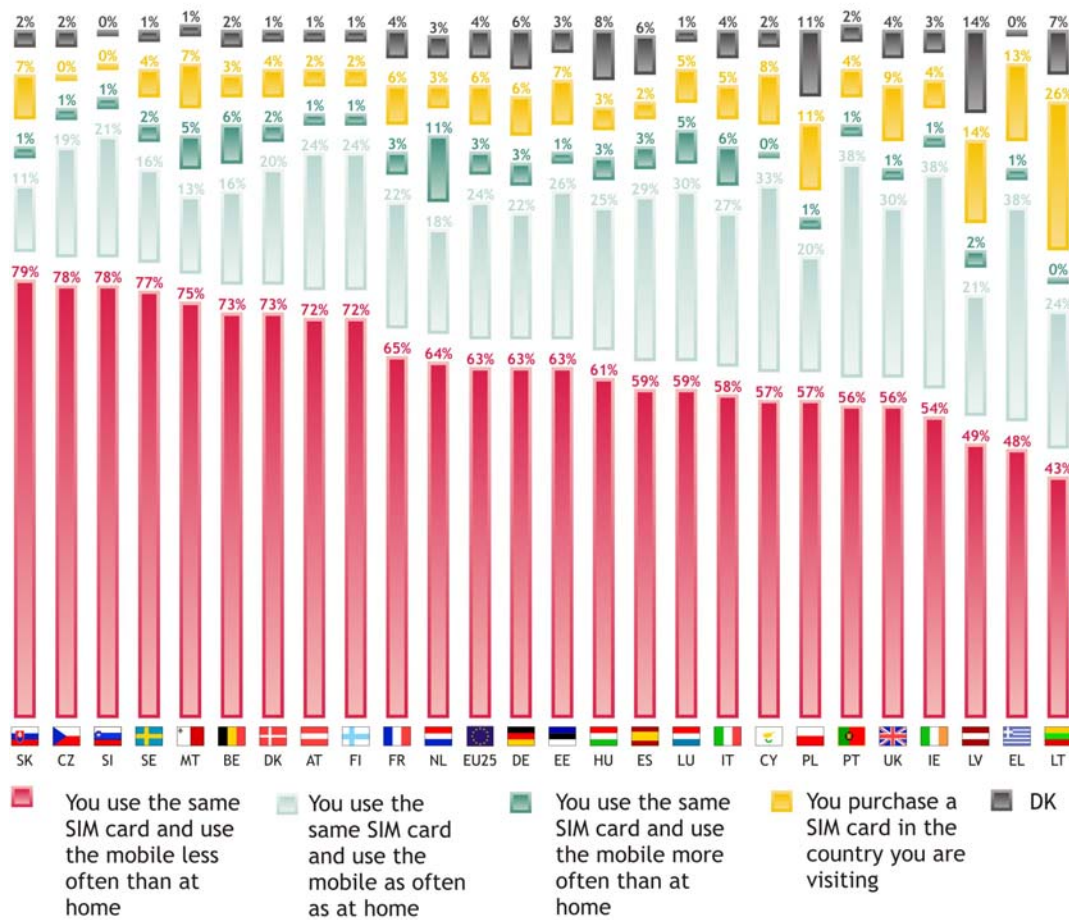
2.3. The frequency with which European use their mobile phone when travelling abroad

- Europeans use their mobile phone far less frequently when abroad -

Questionnaire source: QB5

Once again, respondents who use mobile phone services when abroad will be referred to as “users” (53% of those having a mobile, or 42% of the total sample). Users were asked to describe the way in which they use their mobile phone, and more specifically **the frequency with which they use it**.

Question:Q5 . How would you best describe the use of your mobile phone while abroad in another country?



Base: respondents who use their mobile phone when abroad (42% of the total sample)

Almost all users rely on international roaming services for communication purposes⁸. On average, only 6% of users buy a SIM card in the country they are visiting.

A clear majority (63%) declared that they use their mobile phone far less often when abroad than at home. At European level, only 24% declared that they used their phone as often as at home. On the other hand, 3% of users declared that they use their mobile phone more often when travelling abroad.

However, there are considerable differences from one country to another. Citizens in Slovakia, the Czech Republic and Slovenia, as well as Swedish citizens, tend to use their phone less often when they are travelling abroad than at home. On the contrary, citizens in Latvia, Greece and Lithuania are the least likely to limit their use of mobiles when travelling abroad.

Socio-demographic analysis:

The younger the respondents the more likely they are to limit their use of international roaming (68% of the 15-24 age group versus 57% of people aged 55 and over). The percentage is even as high as 70% among students. **The respondent's education also influences his or her use of international roaming** (62% of those who studied up to or beyond the age of 20 limit their use of roaming compared with 55% of those who left school at 15).

⁸ Ability to access mobile communication services irrespective of the country where the user is located (international roaming enables consumers to keep their SIM card in another country, as well as the same telephone number).

3. WHAT EUROPEANS SEE AS THE MAIN OBSTACLE TO THE USE OF MOBILE PHONE SERVICES ABROAD

The previous chapter highlighted the fact that the vast majority of respondents (63%) who use their phone abroad⁹ limit their mobile communications when they use international roaming services. This chapter will analyse the main reasons why Europeans use their mobile phone less frequently when abroad and will explain why a large proportion of users prefer to do without their mobile phone when travelling abroad.

3.1. Main reasons why Europeans use their mobile phone less frequently when abroad

- The cost is by far the main reason why users limit use of their mobile phone when abroad -

Questionnaire source: QB6 + QB7

Respondents who declared that they use their phone less frequently when travelling abroad were asked to specify the reason for their decision.

RESPONDENTS WHO DECLARED THAT THEY USE THEIR MOBILE PHONE LESS FREQUENTLY WHILE ABROAD IN ANOTHER COUNTRY (26% of all respondents)					
QB6 Among the following list, what is the most important reason for using your mobile phone less frequently while in another country?					
	The cost is too high	You do not wish to be disturbed when travelling abroad	You are afraid to lose your mobile while travelling abroad	Other (SPONTANEOUS)	DK
EU25	81%	12%	2%	4%	1%
EU15	79%	14%	2%	4%	2%
NMS10	91%	6%	1%	1%	1%

A vast majority of this category of respondents (81%) declared that the main reason that they used their mobile phone less frequently when abroad was the excessive cost of international roaming charges. Only 12% declared that they limited their communications when abroad because they did not want to be disturbed, while the fear of losing their mobile phone was mentioned by very few people (2%).

⁹ Representing 53% of mobile owners, or 42% of the total sample

This perception of excessive charges is more widespread in the NEM10 (91%, 10 points higher than the European average) than in the EU15 (79%, - 3 points).

The very high scores in Poland and Slovenia (94%), as well as in the Czech Republic and Portugal (90%) are noteworthy. At the other end of the scale, support for this view is the lowest in Finland and the United Kingdom (74%), Ireland (73%), Italy (72%) and Sweden (71%).

**RESPONDENTS WHO DECLARED THAT THEY USE THEIR MOBILE PHONE LESS FREQUENTLY WHILE ABROAD IN ANOTHER COUNTRY
(26% of all respondents)**

QB6 Among the following list, what is the most important reason for using your mobile phone less frequently while in another country?

	base	The cost is too high
PL	148	94%
SI	503	94%
CZ	466	90%
PT	120	90%
LT	124	89%
HU	172	89%
SK	333	88%
DE	459	87%
AT	362	87%
EE	286	86%
CY	168	85%
MT	191	85%
EL	107	84%

	base	The cost is too high
ES	154	82%
LU	237	82%
EU25	6466	81%
BE	469	80%
FR	247	80%
DK	439	79%
LV	191	79%
NL	491	75%
FI	506	74%
UK	350	74%
IE	287	73%
IT	229	72%
SE	548	71%

N.B.: because of the small number of respondents concerned, the results for certain countries must be treated with a certain degree of circumspection

Socio-demographic analysis:

The younger the respondents the more likely they are to cite excessive cost as the main reason for using their mobile phone less when abroad: 88% of the 15-24 age group mentioned this reason compared with 72% of respondents aged 55 and over.

The respondent's occupation also has a certain influence on this result: 88% of unemployed people and 82% of manual workers declared that cost was the main reason, while the corresponding percentage was 78% among top managers and 77% among self-employed people.

We also asked respondents who do not use their mobile phone when travelling abroad to state the main reason for that decision.

Once again, the main reason given by mobile phone owners for not using their mobile phone when travelling abroad was the excessive cost of communications (54% of them). On the other hand, it is noteworthy that a far from insignificant minority (24%) mentioned that they did not want to be disturbed. Moreover, 9% declared that they had not checked whether it was possible to use their phone abroad and 4% stated that they were afraid of losing their phone.

THOSE WHO DO NOT USE THEIR MOBILE PHONE (12% of all respondents)						
QB7 Among the following list, what is the most important reason for not using your mobile phone while abroad in another country?						
	The cost is too high	You do not wish to be disturbed when travelling abroad	You are not sure if it is possible to use your mobile abroad	You are afraid to lose your mobile while travelling abroad	Other (SPONTANEOUS)	DK
EU25	54%	23%	9%	4%	7%	3%
EU15	53%	24%	9%	3%	8%	3%
NMS10	62%	16%	8%	7%	3%	3%

3.2. The impact of cost on use

- International roaming charges are too high -

Questionnaire source: QB1 + QB8

In the previous chapter, we noted that the main reason why people owning a mobile phone used their mobile less or not at all when travelling abroad is the excessive cost of communications.

This survey also analyses the way in which European perceive international roaming charges in comparison to national tariffs¹⁰.

60% of Europeans declared that the cost of calls when abroad is higher or excessive; 52% have the same opinion regarding text messages and 41% regarding advanced mobile communication services¹¹.

This perception is far more frequent among people who have a mobile phone, and particularly among those who travel abroad. There is also a not negligible difference within the "travellers" group: "users" are far more likely than "non-users" to consider that charges are higher.

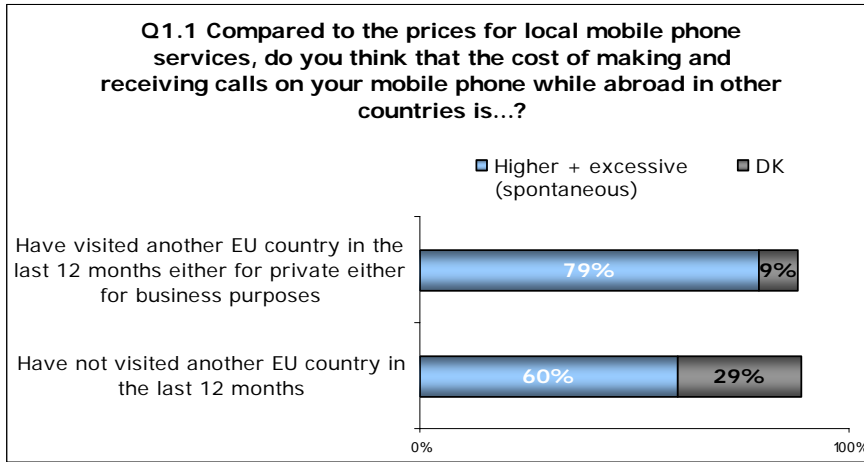
ALL THE SAMPLE
QB1. Compared to the prices for local mobile phone services, do you think that the cost of...?
Making and receiving calls on your mobile phone while abroad in other countries is...

	Base	Higher + Excessive (spontaneous)
EU25	24565	60%
Respondents having a mobile phone	19519	68%
- Users	10579	78%
- Non-users	3032	71%
- Non-travellers	5908	49%

¹⁰ Scale of reply: lower, the same, higher and as a non-suggested reply 'excessive'

¹¹ Services such as access to Web sites to download audio-video content or to send and receive e-mails

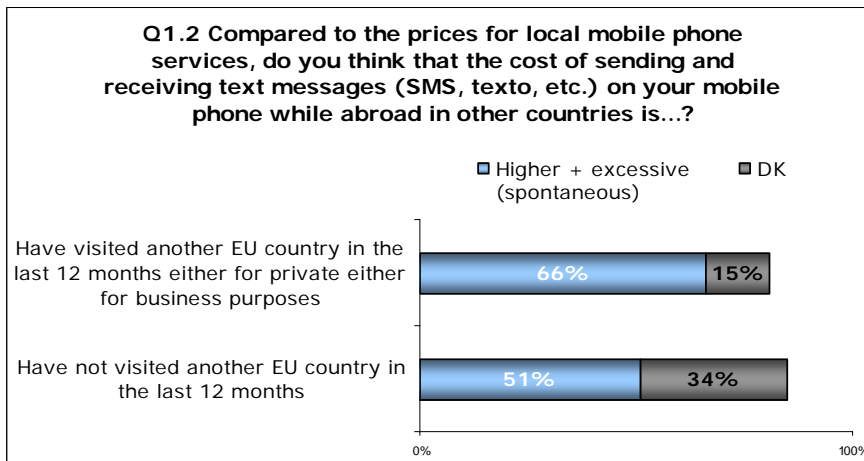
In a similar way, the fact that a respondent has recently visited another European Union country also influences the way he or she perceives roaming charges.



Note: The percentage differences illustrated in the charts in relation to the total of 100% are taken from the "lower" and "the same" replies which are not presented here.

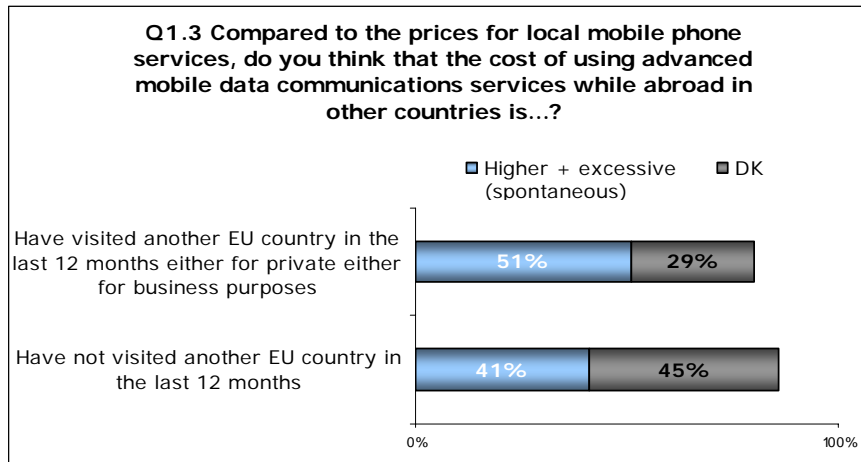
It is to be emphasised however that this opinion is also shared by the absolute majority of those who had not visited another European Union country during the twelve months preceding the survey (those who travel infrequently or never).

The same applies as regards text messages.



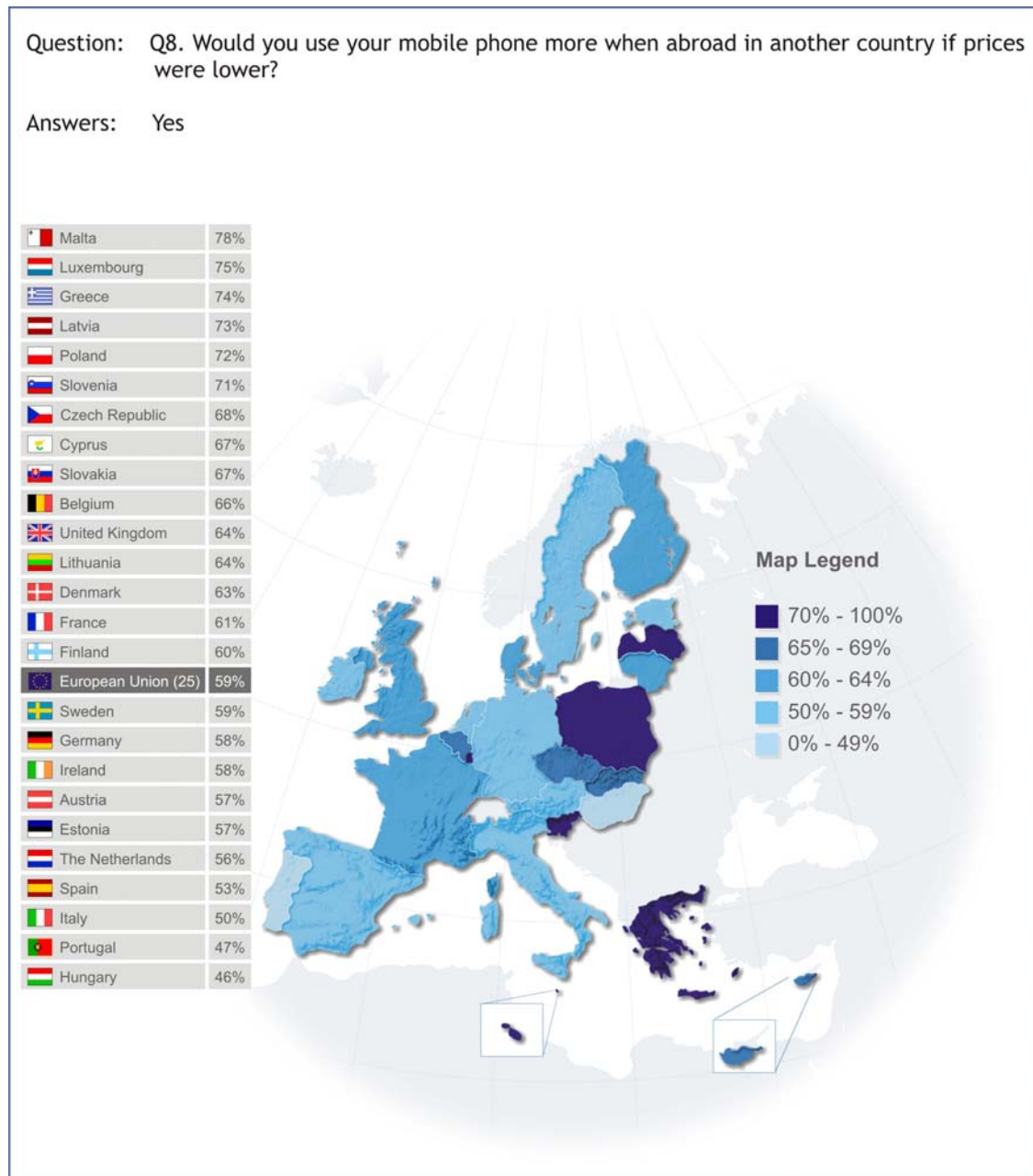
Note: The percentage differences illustrated in the charts in relation to the total of 100% are taken from the "lower" and "the same" replies which are not presented here.

Respondents are far more undecided as regards advanced communication services. However these services were only recently launched on the market and it seems therefore logical that far few Europeans use them as yet.



Note: The percentage differences illustrated in the charts in relation to the total of 100% are taken from the "lower" and "the same" replies which are not presented here.

People having a mobile phone were also asked to express their opinion on the impact of prices on their use of their mobile phone when travelling abroad: more specifically, they were asked whether they would use their mobile more frequently abroad if prices were lower. The map below shows the result of this question.



Base: respondents having a mobile phone (79% of the total sample)

In the European Union, **59% of respondents declared that they would use their mobile phone more frequently when travelling abroad if prices were more attractive.**

Citizens in the new Member States in particular would use their mobile phone more frequently when abroad if prices were lower: the NEM average is 67%, while the EU15 average is 9 points lower (58%).

This result confirms the negative impact of international roaming charges on the use of mobile phones.

Almost one in four respondents (23%) does not share this opinion while 18% did not express an opinion on this question. Fairly logically, there is a correlation between the proportion of "yes" answers and the rate of "DK" replies: thus, the percentage of respondents who would use their mobile phone more if prices were lower falls when the rate of "DK" replies increases. The latter is obviously closely linked to the proportion of citizens, in each country, who never travel abroad.

It is therefore logical that **70% of the "yes" replies are among those who had visited another European Union country for private purposes during the 12 months preceding the survey.**

The proportion of "yes" replies is even higher among travellers who use their phones abroad, and in particular among those who limit their mobile communications because they consider that prices are too high¹².

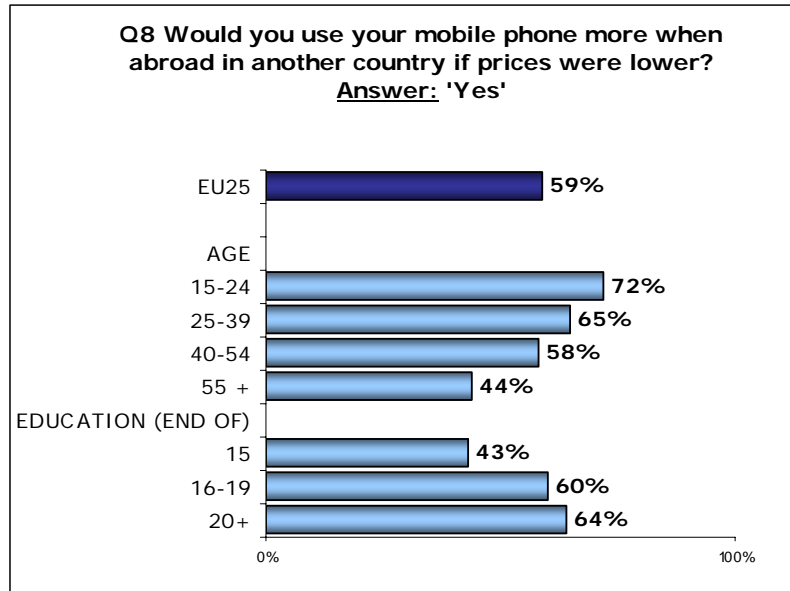
It is also to be emphasised that more than half of non-users (56%) would use their phones abroad if charges were lower.

THOSE WHO HAVE A MOBILE PHONE: (79% of the total sample)		
QB8 Would you use your mobile phone more when abroad in another country if prices were lower?		
	Base	YES
EU25	19519	59%
Users	10579	74%
- who limit their mobile communications because prices are too high	5219	87%
Non-users	3032	56%
- who do not use their phone because prices are too high	1640	76%
Non-travellers	5908	35%
Respondents who have recently visited another EU country for private purposes	8492	70%

¹² That is to say those who replied "The cost is too high" to question QB6: "Among the following list, what is the most important reason for using your mobile phone less frequently while abroad in another country?"

Socio-demographic analysis

The socio-demographic analysis reveals that the respondent's age and level of education are determining factors: the younger the interviewees and the longer they studied, the more likely they would be to make greater use of their mobile phone when travelling abroad if roaming charges were cut.



4. THE EU'S ROLE IN THE MOBILE PHONE SECTOR

As international mobile roaming charges are seen as being too high, Europeans limit their communications when visiting other countries. However, citizens who travel within the European Union should be able to access cross-border mobile phone services at an affordable price. In this context, should the European Union take action, in particular as regards international roaming charges? One of the objectives of this survey is to clarify the situation in this area.

4.1. Lack of knowledge of international roaming charges

- In all European Union countries, a majority of citizens are unaware of the cost of making and receiving calls when they are in another EU country -

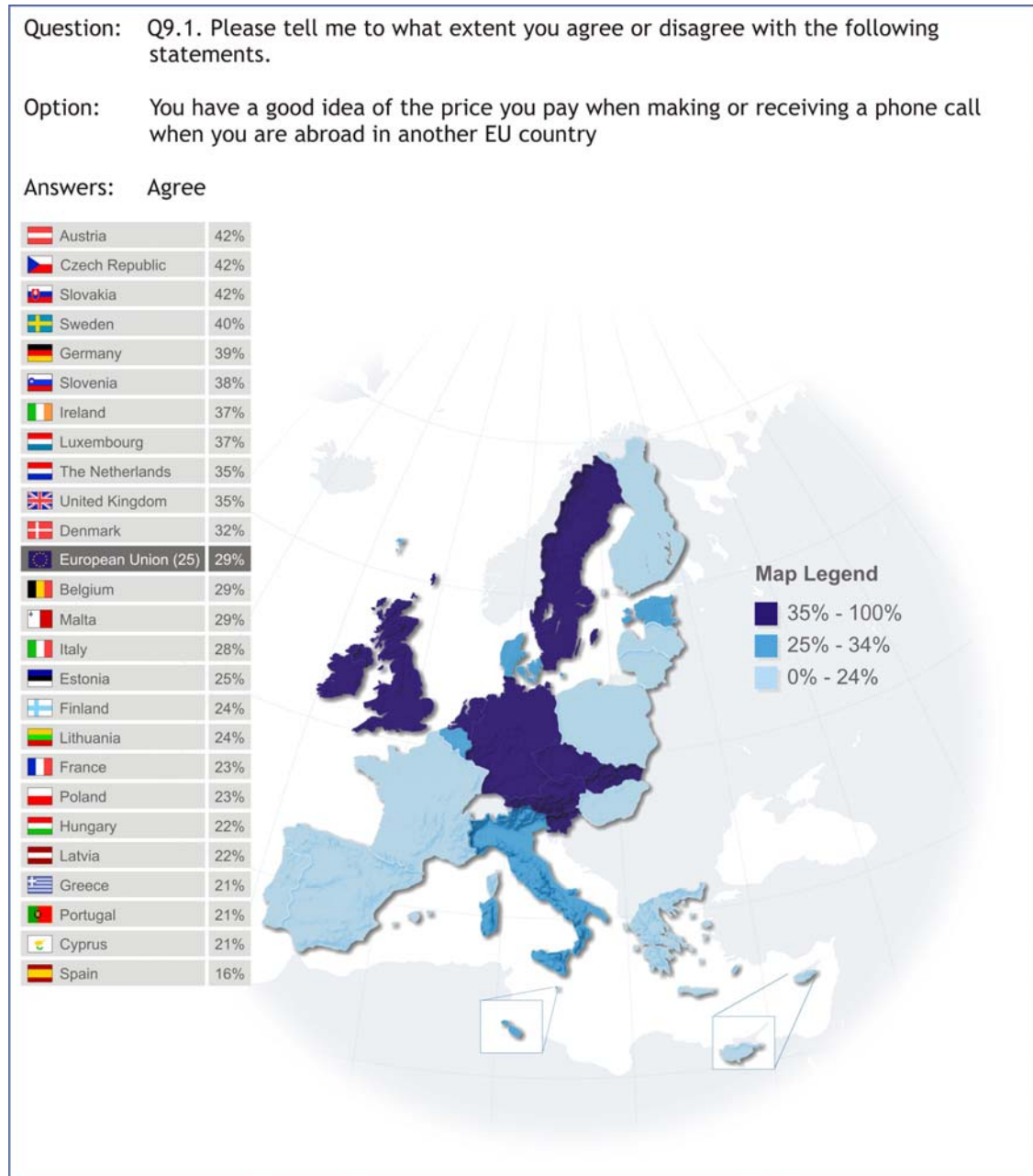
Questionnaire source: QB9

The map below shows the percentages of respondents who consider that they have a good idea of the price they pay for making or receiving a mobile phone call when they are visiting another European Union country.

The overall situation in Europe is negative: in all European Union countries, only a minority of citizens consider that they are familiar with international roaming charges (29% on average)¹³. On the contrary, four out of ten Europeans (42%) declared that they do not have a clear idea of the cost of communications – made and received – when abroad. Finally, almost three in ten Europeans declared spontaneously that they are not directly concerned by the question (14%) or do not know (15%).

In five countries, an absolute majority of respondents did not agree with the statement that they have a good idea of international roaming charges: the five countries are Finland (60%), Belgium (57%), Greece (56%), the Netherlands (53%) and Germany (51%).

¹³ It is worth to underline the fact that the question was asked to all respondents, that is to say even to those who do not travel abroad and those who do not have a mobile phone.



The rate of DK replies is obviously above the average in the countries where citizens tend to travel abroad less frequently, as well as in those where the mobile phone penetration rate is lower.

The respondents who are the most concerned by international roaming seem to be more familiar with roaming charges. The respondents in question are those who have a mobile phone and "travellers". Among the "travellers" it is noteworthy that "users" are far more likely than "non-users" to have a good knowledge of the cost of communications abroad.

ALL THE SAMPLE
QB9 Please tell me to what extent you agree or disagree with the following statements.

You have a good idea of the price you pay when making or receiving a phone call when you are abroad in another EU country
--

	Base	Agree
EU25	24565	29%
Respondents having a mobile phone	19519	35%
- Users	10579	49%
- Non-users	3032	32%
- Non-travellers	5908	11%

It is also important to emphasise that **the younger the respondents, the more likely they are to have a good idea of roaming tariffs**: 38% among those in the 15-24 age group and 36% among those aged 25-39, compared with 20% among respondents aged 55 and over.

4.2. The European Union’s role

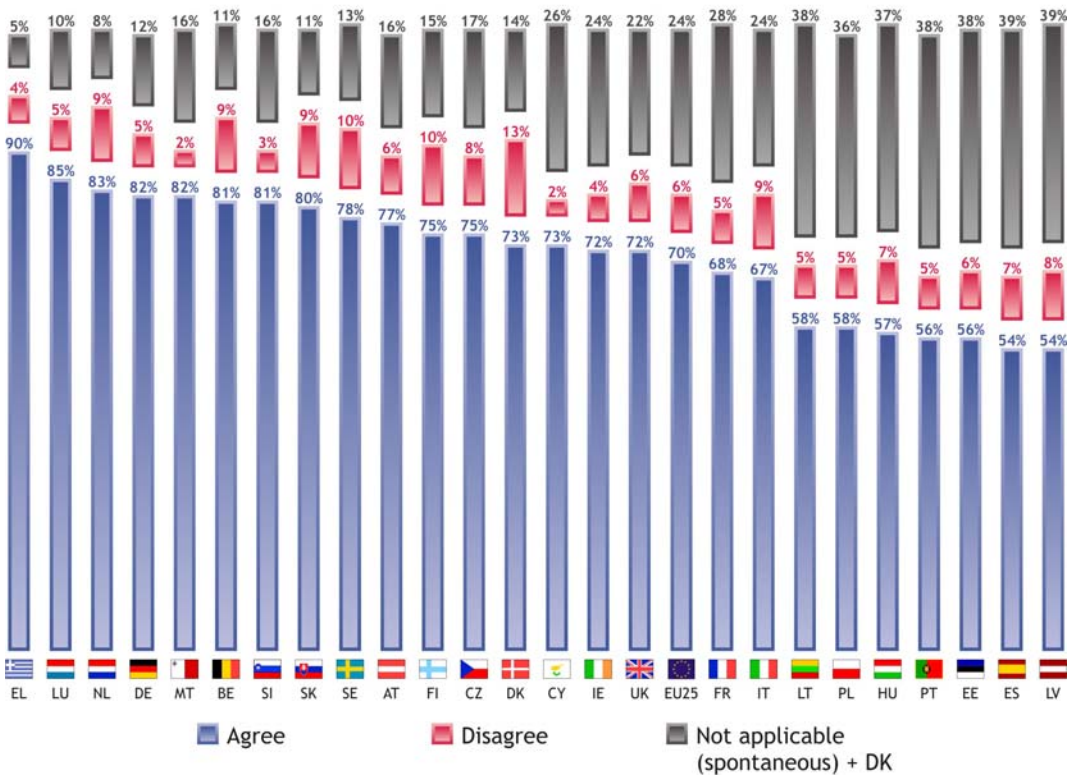
- A majority of Europeans are in favour of action at European Union level -

Questionnaire source: QB9

Finally, this survey addresses the question of the European Union’s role as regards international roaming charges. The results reveal that there is very strong support for EU action in this sector. **Seven out of ten Europeans would like the EU to take action to ensure that the cost of making and receiving calls on mobile phones when travelling in other EU countries, is not unreasonably higher than those paid at home.**

Question: Q9.3. Please tell me to what extent you agree or disagree with the following statements.

Option: The EU should make sure that prices for making and receiving calls on mobile phones when travelling in other EU countries are not a lot higher than those at home

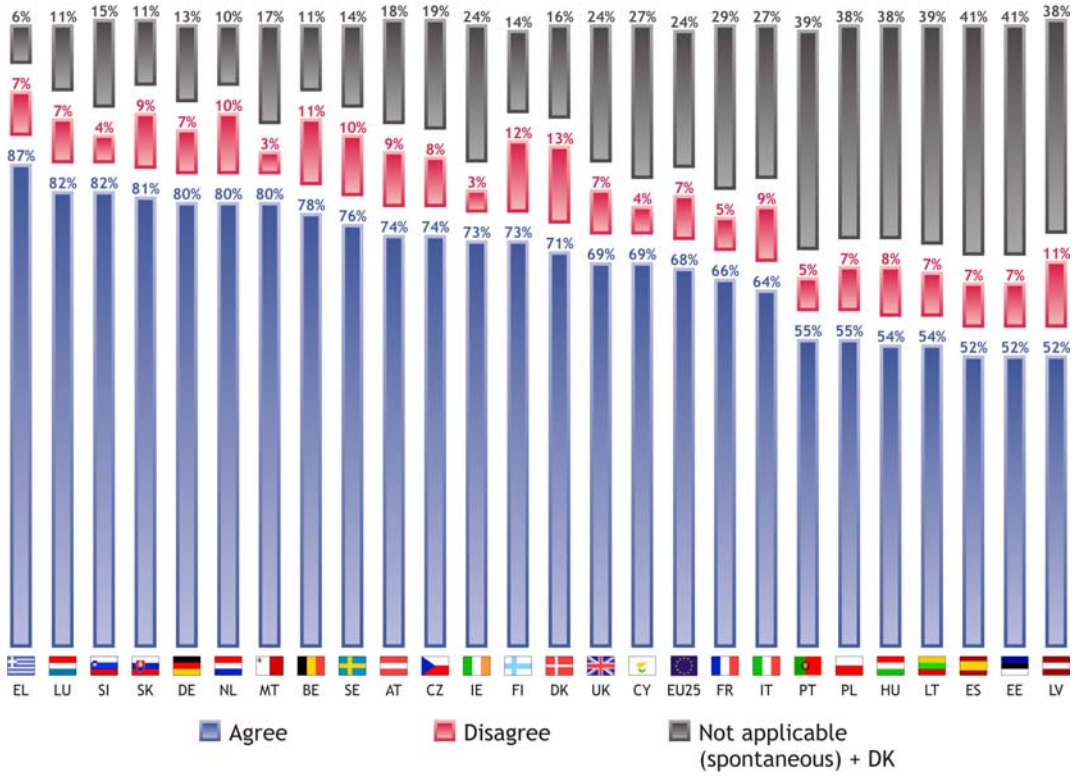


The trend is identical as regards the cost of text messages. In all the European Union countries, a majority of interviewees (68%) would like the European authorities to take action on this question.

Logically, the lowest level of support for this idea is to be found in the countries with the lowest mobile phone penetration levels, and where people travel abroad less frequently.

Question:Q9.2. Please tell me to what extent you agree or disagree with the following statements.

Option: The EU should make sure that prices for sending and receiving text messages (SMS, texto, etc.) on mobile phones when travelling in other EU countries are not unreasonably higher



The respondents who have a mobile phone and those who use their mobile phone abroad strongly support European Union action to ensure that prices for making and receiving calls when travelling in other EU countries are not a lot higher than those at home (78% and 88% respectively).

ALL THE SAMPLE
QB9 Please tell me to what extent you agree or disagree with the following statements.

The EU should make sure that prices for making and receiving calls on mobile phones when travelling in other EU countries are not a lot higher than those at home

	Base	Agree
EU25	24565	70%
Respondents having a mobile phone	19519	78%
- Users	10579	88%
- Non-users	3032	81%
- Non-travellers	5908	59%

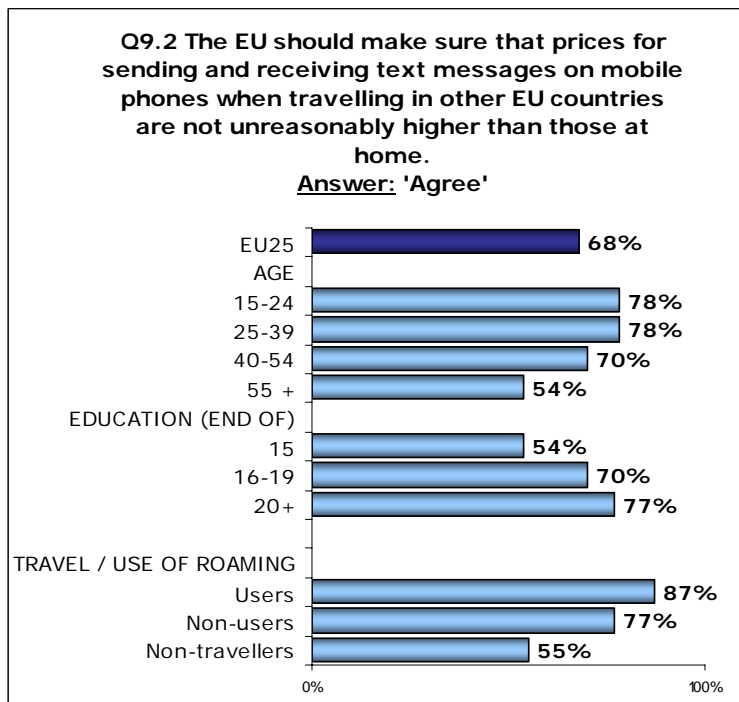
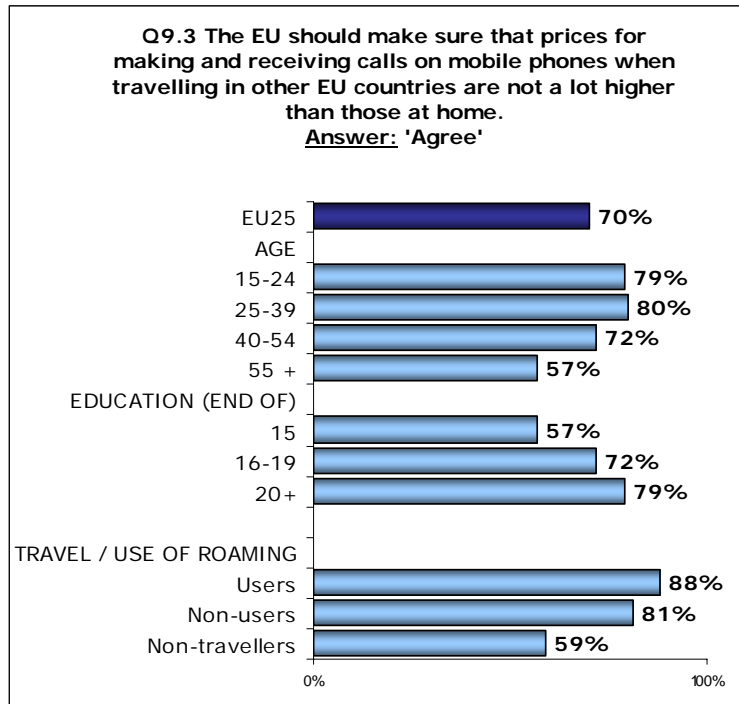
We note the same situation as regards the price of text messages.

It is worthwhile emphasising that **there is also strong support for European Union action among respondents who do not have a mobile phone** and who are therefore not directly affected by the issue of roaming charges at the current time (42% for the price of calls and 39% for the price of text messages).

Socio-demographic analysis

The younger the respondents and the higher their level of education, the more likely they are to want the EU to take action on international roaming charges.

As we have seen more young people own mobile phones and they travel as much as people aged 55 and over. However, young people make the least use of mobile phones when travelling abroad, in particular because of the cost. Accordingly, it is logical that this age group's support for EU action on international roaming charges is higher than the European average.



ANNEXES

Technical note

SPECIAL EUROBAROMETER N° 269

“Roaming”

TECHNICAL SPECIFICATIONS

Between the 6th of September and the 10th of October 2006, TNS Opinion & Social, a consortium created between Taylor Nelson Sofres and EOS Gallup Europe, carried out wave 66.1 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate General Communication, “Public Opinion and Media Monitoring”.

The SPECIAL EUROBAROMETER N°269 is part of wave 66.1 covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over. The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the “administrative regional units”, after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas. In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard “random route” procedures, from the initial address. In each household, the respondent was drawn, at random (following the “closest birthday rule”). All interviews were conducted face-to-face in people’s homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

ABBREVIATIONS	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.003	6/09/2006	1/10/2006	8.650.994
CZ	Czech Rep.	TNS Aisa	1.091	7/09/2006	26/09/2006	8.571.710
DK	Denmark	TNS Gallup DK	1.003	9/09/2006	10/10/2006	4.411.580
DE	Germany	TNS Infratest	1.525	8/09/2006	4/10/2006	64.361.608
EE	Estonia	Emor	1.000	8/09/2006	2/10/2006	887.094
EL	Greece	TNS ICAP	1.000	6/09/2006	3/10/2006	8.693.566
ES	Spain	TNS Demoscopia	1.003	6/09/2006	5/10/2006	37.024.972
FR	France	TNS Sofres	1.007	6/09/2006	30/09/2006	44.010.619
IE	Ireland	TNS MRBI	1.000	6/09/2006	10/10/2006	3.089.775
IT	Italy	TNS Abacus	1.006	7/09/2006	5/10/2006	48.892.559
CY	Rep. of Cyprus	Synovate	503	6/09/2006	1/10/2006	596.752
LV	Latvia	TNS Latvia	1.015	8/09/2006	9/10/2006	1.418.596
LT	Lithuania	TNS Gallup Lithuania	1.000	6/09/2006	2/10/2006	2.803.661
LU	Luxembourg	TNS ILReS	500	6/09/2006	4/10/2006	374.097
HU	Hungary	TNS Hungary	1.005	6/09/2006	25/09/2006	8.503.379
MT	Malta	MISCO	500	7/09/2006	4/10/2006	321.114
NL	Netherlands	TNS NIPO	1.018	6/09/2006	5/10/2006	13.030.000
AT	Austria	Österreichisches Gallup-Institut	1.016	6/09/2006	5/10/2006	6.848.736
PL	Poland	TNS OBOP	1.000	9/09/2006	4/10/2006	31.967.880
PT	Portugal	TNS EUROTESTE	995	6/09/2006	2/10/2006	8.080.915
SI	Slovenia	RM PLUS	1.031	6/09/2006	5/10/2006	1.720.137
SK	Slovakia	TNS AISA SK	1.023	13/09/2006	26/09/2006	4.316.438
FI	Finland	TNS Gallup Oy	1.000	7/09/2006	4/10/2006	4.348.676
SE	Sweden	TNS GALLUP	1.013	7/09/2006	2/10/2006	7.486.976
UK	United Kingdom	TNS UK	1.308	6/09/2006	7/10/2006	47.685.578
TOTAL			24.565	6/09/2006	10/10/2006	368.097.412

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Opinion & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed above.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Observed percentages	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Confidence limits	± 1.9 points	± 2.5 points	± 2.7 points	± 3.0 points	± 3.1 points

Tables of results

QB1.1 Compared to the prices for local mobile phone services, do you think that the cost of...?

Making and receiving calls on your mobile phone while abroad in other countries is...

	TOTAL	Lower	At the same level	Higher	Excessive (SPONTANEOUS)	DK
EU25	24565	4%	7%	54%	6%	28%
BE	1003	2%	7%	70%	11%	10%
CZ	1091	7%	5%	60%	8%	19%
DK	1003	3%	6%	68%	5%	18%
D-W	1018	9%	5%	62%	3%	20%
DE	1525	8%	5%	64%	3%	20%
D-E	507	3%	6%	72%	3%	16%
EE	1000	3%	4%	52%	8%	33%
EL	1000	9%	12%	64%	3%	12%
ES	1003	3%	5%	39%	7%	46%
FR	1007	2%	5%	59%	5%	28%
IE	1000	2%	4%	43%	22%	30%
IT	1006	4%	14%	35%	12%	36%
CY	503	3%	3%	51%	5%	39%
LV	1015	7%	7%	40%	4%	42%
LT	1000	6%	4%	48%	1%	41%
LU	500	5%	4%	53%	24%	14%
HU	1005	2%	4%	47%	13%	35%
MT	500	5%	5%	56%	5%	29%
NL	1018	4%	5%	78%	3%	10%
AT	1016	2%	9%	54%	16%	19%
PL	1000	5%	5%	49%	6%	35%
PT	995	1%	4%	49%	5%	41%
SI	1031	1%	3%	72%	11%	14%
SK	1023	15%	10%	54%	3%	17%
FI	1000	2%	10%	67%	3%	17%
SE	1013	1%	5%	60%	8%	26%
UK	1308	3%	7%	60%	3%	26%

QB1.2 Compared to the prices for local mobile phone services, do you think that the cost of...?

Sending and receiving text messages (SMS, texto, etc.) on your mobile phone while abroad in other countries is ...

	TOTAL	Lower	At the same level	Higher	Excessive (SPONTANEOUS)	DK
EU25	24565	4%	11%	47%	5%	34%
BE	1003	3%	16%	60%	8%	13%
CZ	1091	6%	11%	58%	5%	20%
DK	1003	2%	13%	57%	4%	24%
D-W	1018	7%	10%	55%	2%	27%
DE	1525	6%	11%	56%	2%	25%
D-E	507	3%	14%	62%	1%	20%
EE	1000	3%	22%	31%	3%	42%
EL	1000	8%	14%	60%	2%	16%
ES	1003	2%	7%	37%	5%	49%
FR	1007	3%	11%	43%	3%	40%
IE	1000	1%	10%	41%	14%	33%
IT	1006	4%	15%	30%	10%	41%
CY	503	3%	10%	34%	2%	51%
LV	1015	6%	16%	30%	2%	47%
LT	1000	5%	6%	44%	1%	44%
LU	500	6%	9%	47%	12%	26%
HU	1005	2%	8%	44%	9%	37%
MT	500	5%	12%	47%	3%	33%
NL	1018	6%	15%	56%	2%	20%
AT	1016	3%	10%	55%	13%	20%
PL	1000	5%	6%	46%	5%	38%
PT	995	2%	4%	46%	3%	45%
SI	1031	2%	8%	64%	7%	20%
SK	1023	14%	14%	52%	2%	18%
FI	1000	2%	29%	44%	2%	22%
SE	1013	2%	14%	41%	3%	40%
UK	1308	3%	11%	53%	2%	31%

QB1.3 Compared to the prices for local mobile phone services, do you think that the cost of...?

Using advanced mobile data communications services such as accessing websites for downloading audio\ video content, sending and receiving e-mails while abroad in other countries is...

	TOTAL	Lower	At the same level	Higher	Excessive (SPONTANEOUS)	DK
EU25	24565	4%	11%	37%	4%	44%
BE	1003	4%	20%	45%	7%	23%
CZ	1091	9%	8%	41%	5%	37%
DK	1003	3%	10%	40%	5%	41%
D-W	1018	6%	11%	44%	2%	38%
DE	1525	5%	11%	45%	2%	37%
D-E	507	1%	12%	51%	1%	35%
EE	1000	2%	15%	24%	3%	56%
EL	1000	7%	12%	56%	2%	23%
ES	1003	3%	6%	33%	5%	54%
FR	1007	3%	13%	33%	3%	48%
IE	1000	1%	6%	29%	13%	51%
IT	1006	4%	12%	24%	8%	52%
CY	503	2%	4%	24%	1%	69%
LV	1015	6%	10%	24%	2%	58%
LT	1000	4%	8%	29%	2%	57%
LU	500	4%	4%	32%	10%	50%
HU	1005	1%	5%	39%	9%	45%
MT	500	4%	8%	34%	2%	53%
NL	1018	4%	16%	44%	3%	33%
AT	1016	3%	8%	50%	10%	28%
PL	1000	5%	7%	35%	4%	50%
PT	995	1%	3%	42%	4%	51%
SI	1031	1%	5%	53%	6%	35%
SK	1023	15%	13%	42%	2%	28%
FI	1000	2%	18%	35%	3%	40%
SE	1013	1%	7%	26%	3%	64%
UK	1308	4%	15%	39%	1%	42%

QB2a Please tell me which of the following situation applies to you. (MULTIPLE ANSWERS POSSIBLE)

	TOTAL	You have a private mobile phone	You have a business mobile phone	You do not have a mobile phone	DK	Have a mobile phone
EU25	24565	76%	8%	19%	1%	79%
BE	1003	80%	9%	15%	0%	85%
CZ	1091	84%	8%	12%	0%	87%
DK	1003	84%	14%	9%	3%	88%
D-W	1018	74%	7%	23%	1%	76%
DE	1525	74%	6%	23%	1%	76%
D-E	507	75%	5%	21%	1%	78%
EE	1000	81%	6%	13%	2%	86%
EL	1000	73%	3%	26%	-	74%
ES	1003	73%	4%	24%	1%	75%
FR	1007	74%	9%	21%	0%	79%
IE	1000	81%	6%	10%	3%	87%
IT	1006	80%	7%	12%	3%	85%
CY	503	80%	6%	18%	0%	82%
LV	1015	81%	6%	16%	1%	84%
LT	1000	74%	7%	20%	3%	76%
LU	500	86%	16%	10%	-	90%
HU	1005	69%	4%	27%	1%	72%
MT	500	82%	4%	16%	0%	84%
NL	1018	81%	22%	9%	0%	91%
AT	1016	78%	8%	17%	2%	81%
PL	1000	62%	4%	35%	1%	64%
PT	995	75%	3%	23%	0%	77%
SI	1031	81%	9%	15%	0%	85%
SK	1023	80%	6%	19%	0%	81%
FI	1000	86%	13%	7%	0%	93%
SE	1013	84%	24%	5%	-	95%
UK	1308	81%	10%	15%	1%	85%

QB2a Please tell me which of the following situation applies to you. (MULTIPLE ANSWERS POSSIBLE)

	TOTAL	You have only a private mobile phone	You have only a business mobile phone	You have both	You do not have a mobile phone	DK
EU25	24565	72%	4%	4%	19%	1%
BE	1003	75%	5%	5%	15%	0%
CZ	1091	80%	3%	5%	12%	0%
DK	1003	74%	4%	10%	9%	3%
D-W	1018	69%	2%	5%	23%	1%
DE	1525	70%	2%	4%	23%	1%
D-E	507	73%	3%	2%	21%	1%
EE	1000	79%	5%	2%	13%	2%
EL	1000	71%	1%	2%	26%	-
ES	1003	71%	3%	2%	24%	1%
FR	1007	69%	4%	5%	21%	0%
IE	1000	81%	6%	0%	10%	3%
IT	1006	78%	5%	2%	12%	3%
CY	503	76%	1%	4%	18%	0%
LV	1015	78%	3%	3%	16%	1%
LT	1000	70%	2%	5%	20%	3%
LU	500	74%	3%	12%	10%	-
HU	1005	67%	3%	2%	27%	1%
MT	500	81%	2%	2%	16%	0%
NL	1018	69%	10%	11%	9%	0%
AT	1016	73%	3%	5%	17%	2%
PL	1000	60%	2%	2%	35%	1%
PT	995	74%	2%	1%	23%	0%
SI	1031	76%	3%	6%	15%	0%
SK	1023	75%	1%	5%	19%	0%
FI	1000	80%	7%	6%	7%	0%
SE	1013	71%	11%	13%	5%	-
UK	1308	75%	4%	6%	15%	1%

QB2b And do you have a mobile phone access on the basis of a contract (billed afterwards) or on a pre-paid arrangement (pre-paid cards)?
 (IF 'HAVE A MOBILE PHONE', CODE 1 OR 2 IN QB2a)

	TOTAL	Mobile phone access on the basis of a contract (billed afterwards)	Mobile phone access on a pre-paid arrangement (pre-paid cards)	Both (SPONTANEOUS)	DK
EU25	19519	45%	53%	1%	1%
BE	849	44%	55%	1%	0%
CZ	952	38%	61%	1%	0%
DK	886	67%	31%	1%	1%
D-W	771	57%	40%	2%	1%
DE	1163	55%	42%	2%	1%
D-E	396	48%	51%	1%	-
EE	856	75%	23%	1%	1%
EL	740	52%	45%	2%	-
ES	756	65%	33%	1%	1%
FR	791	67%	30%	1%	1%
IE	870	23%	74%	1%	2%
IT	850	7%	93%	1%	-
CY	410	59%	41%	1%	-
LV	849	44%	55%	1%	0%
LT	764	51%	46%	2%	1%
LU	449	67%	31%	1%	0%
HU	723	30%	69%	1%	0%
MT	421	6%	94%	-	-
NL	924	52%	46%	2%	0%
AT	823	71%	27%	2%	0%
PL	639	46%	53%	1%	0%
PT	767	9%	88%	1%	1%
SI	872	65%	33%	1%	-
SK	828	54%	42%	2%	2%
FI	927	94%	4%	1%	1%
SE	963	57%	40%	3%	0%
UK	1107	33%	65%	1%	1%

QB3.1 In the last 12 months have you...?

Visited another EU country for private purposes
(IF 'HAVE A MOBILE PHONE', CODE 1 OR 2 IN QB2a)

	TOTAL	Yes, on several occasions	Yes, once or twice only	No	Yes
EU25	19519	16%	27%	56%	44%
BE	849	30%	38%	32%	68%
CZ	952	16%	32%	52%	48%
DK	886	28%	41%	31%	69%
D-W	771	29%	30%	41%	59%
DE	1163	27%	29%	44%	56%
D-E	396	21%	25%	54%	46%
EE	856	16%	23%	62%	38%
EL	740	7%	11%	82%	18%
ES	756	6%	25%	70%	30%
FR	791	15%	24%	60%	40%
IE	870	12%	41%	47%	53%
IT	850	9%	22%	69%	31%
CY	410	6%	38%	56%	44%
LV	849	11%	20%	69%	31%
LT	764	14%	13%	73%	27%
LU	449	47%	40%	13%	87%
HU	723	10%	19%	71%	29%
MT	421	9%	20%	71%	29%
NL	924	40%	38%	22%	78%
AT	823	29%	41%	30%	70%
PL	639	9%	19%	72%	28%
PT	767	14%	9%	78%	22%
SI	872	27%	29%	44%	56%
SK	828	22%	27%	50%	50%
FI	927	15%	35%	50%	50%
SE	963	23%	39%	39%	61%
UK	1107	12%	33%	54%	46%

QB3.2 In the last 12 months have you...?

Visited another EU country for business purposes
(IF 'HAVE A MOBILE PHONE', CODE 1 OR 2 IN QB2a)

	TOTAL	Yes, on several occasions	Yes, once or twice only	No	Yes
EU25	19519	4%	5%	90%	10%
BE	849	7%	6%	87%	13%
CZ	952	3%	6%	91%	9%
DK	886	7%	6%	87%	13%
D-W	771	5%	4%	92%	8%
DE	1163	4%	4%	92%	8%
D-E	396	2%	3%	95%	5%
EE	856	8%	9%	84%	16%
EL	740	2%	3%	94%	6%
ES	756	3%	4%	94%	6%
FR	791	3%	4%	94%	6%
IE	870	3%	7%	91%	9%
IT	850	5%	9%	86%	14%
CY	410	2%	6%	92%	8%
LV	849	6%	7%	87%	13%
LT	764	5%	5%	90%	10%
LU	449	9%	10%	81%	19%
HU	723	3%	5%	91%	9%
MT	421	3%	3%	94%	6%
NL	924	8%	8%	84%	16%
AT	823	9%	8%	83%	17%
PL	639	3%	5%	92%	8%
PT	767	3%	4%	92%	8%
SI	872	8%	7%	85%	15%
SK	828	6%	6%	88%	12%
FI	927	6%	9%	86%	14%
SE	963	5%	8%	86%	14%
UK	1107	4%	5%	92%	8%

QB3.3 In the last 12 months have you...?

Visited a country outside of the EU
(IF 'HAVE A MOBILE PHONE', CODE 1 OR 2 IN QB2a)

	TOTAL	Yes, on several occasions	Yes, once or twice only	No	Yes
EU25	19519	5%	16%	79%	21%
BE	849	6%	16%	78%	22%
CZ	952	2%	17%	81%	19%
DK	886	6%	23%	70%	30%
D-W	771	7%	19%	74%	26%
DE	1163	6%	18%	76%	24%
D-E	396	4%	15%	81%	19%
EE	856	5%	12%	83%	17%
EL	740	4%	7%	89%	11%
ES	756	4%	15%	81%	19%
FR	791	5%	14%	81%	19%
IE	870	7%	15%	79%	21%
IT	850	6%	13%	81%	19%
CY	410	1%	14%	86%	14%
LV	849	5%	11%	84%	16%
LT	764	7%	6%	87%	13%
LU	449	7%	22%	72%	28%
HU	723	7%	12%	81%	19%
MT	421	2%	8%	90%	10%
NL	924	7%	21%	73%	27%
AT	823	9%	26%	64%	36%
PL	639	4%	8%	88%	12%
PT	767	3%	4%	93%	7%
SI	872	22%	40%	38%	62%
SK	828	2%	10%	88%	12%
FI	927	6%	19%	75%	25%
SE	963	8%	24%	68%	32%
UK	1107	4%	20%	77%	23%

QB4 Which of the following mobile communication services do you use most when you are abroad in another country? (MULTIPLE ANSWERS POSSIBLE)

(IF 'HAVE A MOBILE PHONE', CODE 1 OR 2 IN QB2a)

	TOTAL	Making voice calls	Receiving voice calls	Sending text messages (SMS, text, etc.)	Receiving text messages (SMS, text, etc.)	Advanced mobile data communications services like accessing websites for downloading audio\ video content, sending and receiving e-mails	You do not take your mobile phone with you when you are visiting a foreign country	You normally switch off your mobile phone when abroad	Never go abroad (SPONTANEOUS)	Other (SPONTANEOUS)	DK	Use services
EU25	19519	35%	30%	30%	25%	2%	7%	8%	25%	1%	5%	53%
BE	849	47%	42%	49%	43%	5%	4%	6%	12%	1%	1%	75%
CZ	952	16%	22%	55%	48%	1%	7%	9%	15%	0%	5%	63%
DK	886	36%	30%	51%	42%	2%	12%	12%	5%	1%	3%	68%
D-W	771	48%	42%	35%	29%	2%	8%	13%	9%	0%	4%	66%
DE	1163	44%	39%	32%	27%	2%	8%	14%	11%	0%	4%	63%
D-E	396	29%	27%	22%	17%	2%	11%	18%	18%	1%	4%	47%
EE	856	37%	36%	29%	25%	3%	4%	4%	30%	1%	9%	53%
EL	740	25%	24%	15%	12%	1%	8%	3%	57%	2%	0%	30%
ES	756	27%	22%	19%	15%	2%	5%	7%	46%	2%	6%	34%
FR	791	37%	33%	19%	15%	2%	10%	10%	27%	3%	2%	48%
IE	870	30%	26%	52%	45%	3%	6%	5%	20%	1%	7%	61%
IT	850	33%	30%	23%	18%	2%	2%	3%	37%	1%	10%	46%
CY	410	59%	60%	42%	37%	1%	5%	4%	11%	6%	3%	72%
LV	849	33%	33%	26%	23%	2%	5%	6%	35%	1%	8%	46%
LT	764	24%	19%	24%	18%	2%	2%	3%	31%	-	26%	37%
LU	449	67%	67%	54%	47%	3%	4%	3%	2%	1%	1%	89%
HU	723	23%	25%	20%	17%	2%	4%	7%	37%	1%	12%	39%
MT	421	39%	32%	53%	49%	3%	4%	0%	30%	0%	4%	61%
NL	924	56%	40%	47%	42%	5%	5%	3%	6%	2%	1%	83%
AT	823	41%	45%	40%	36%	3%	9%	17%	11%	0%	1%	61%
PL	639	20%	17%	32%	24%	2%	6%	6%	40%	3%	6%	40%
PT	767	25%	17%	7%	5%	1%	4%	6%	57%	1%	4%	28%
SI	872	52%	54%	49%	45%	3%	3%	9%	12%	2%	1%	74%
SK	828	22%	22%	42%	36%	2%	13%	11%	20%	1%	4%	51%
FI	927	40%	38%	52%	41%	4%	5%	5%	10%	2%	2%	76%
SE	963	55%	50%	45%	44%	3%	11%	6%	7%	1%	1%	73%
UK	1107	35%	25%	35%	26%	3%	13%	10%	17%	1%	3%	57%

QB5 How would you best describe the use of your mobile phone while abroad in another country?
 (IF 'USES MOBILE COMMUNICATION SERVICES WHILE ABROAD', CODE 1 TO 5 IN QB4)

	TOTAL	You use the same SIM card and use the mobile as often as at home	You use the same SIM card and use the mobile less often than at home	You use the same SIM card and use the mobile more often than at home	You purchase a SIM card in the country you are visiting	DK
EU25	10311	24%	63%	3%	6%	4%
BE	640	16%	73%	6%	3%	2%
CZ	598	19%	78%	1%	0%	2%
DK	598	20%	73%	2%	4%	1%
D-W	512	24%	62%	3%	5%	6%
DE	727	22%	63%	3%	6%	6%
D-E	187	13%	71%	2%	8%	6%
EE	453	26%	63%	1%	7%	3%
EL	222	38%	48%	1%	13%	-
ES	259	29%	59%	3%	2%	6%
FR	381	22%	65%	3%	6%	4%
IE	534	38%	54%	1%	4%	3%
IT	395	27%	58%	6%	5%	4%
CY	293	33%	57%	0%	8%	2%
LV	389	21%	49%	2%	14%	14%
LT	286	24%	43%	-	26%	7%
LU	400	30%	59%	5%	5%	1%
HU	282	25%	61%	3%	3%	8%
MT	255	13%	75%	5%	7%	1%
NL	764	18%	64%	11%	3%	3%
AT	505	24%	72%	1%	2%	1%
PL	257	20%	57%	1%	11%	11%
PT	214	38%	56%	1%	4%	2%
SI	644	21%	78%	1%	0%	0%
SK	423	11%	79%	1%	7%	2%
FI	704	24%	72%	1%	2%	1%
SE	707	16%	77%	2%	4%	1%
UK	626	30%	56%	1%	9%	4%

QB6 Among the following list, what is the most important reason for using your mobile phone less frequently while abroad in another country? (ROTATE)
 (IF 'USE MOBILE PHONE LESS FREQUENTLY WHILE ABROAD', CODE 2 IN QB5)

	TOTAL	The cost is too high	You do not wish to be disturbed when travelling abroad	You are afraid to lose your mobile while travelling abroad	Other (SPONTANEOUS)	DK
EU25	6466	81%	12%	2%	4%	1%
BE	469	80%	15%	1%	3%	0%
CZ	466	90%	6%	2%	0%	1%
DK	439	79%	14%	1%	6%	0%
D-W	316	86%	10%	1%	3%	1%
DE	459	87%	9%	1%	2%	1%
D-E	132	93%	6%	-	1%	-
EE	286	86%	6%	-	6%	1%
EL	107	84%	15%	1%	1%	-
ES	154	82%	8%	3%	5%	3%
FR	247	80%	13%	1%	4%	3%
IE	287	73%	9%	-	-	18%
IT	229	72%	14%	4%	9%	1%
CY	168	85%	14%	-	1%	-
LV	191	79%	12%	2%	5%	2%
LT	124	89%	7%	1%	2%	-
LU	237	82%	13%	-	4%	0%
HU	172	89%	8%	1%	1%	2%
MT	191	85%	11%	1%	2%	1%
NL	491	75%	18%	1%	5%	1%
AT	362	87%	7%	4%	1%	0%
PL	148	94%	3%	1%	0%	1%
PT	120	90%	7%	-	2%	1%
SI	503	94%	4%	1%	2%	-
SK	333	88%	10%	0%	-	2%
FI	506	74%	17%	1%	7%	1%
SE	548	71%	20%	1%	7%	1%
UK	350	74%	20%	2%	2%	2%

QB7 Among the following list, what is the most important reason for not using your mobile phone while abroad in another country? (ROTATE)
 (IF 'DO NOT USE MOBILE COMMUNICATION SERVICES WHILE ABROAD', CODE 6 OR 7 IN QB4)

	TOTAL	The cost is too high	You do not wish to be disturbed when travelling abroad	You are not sure if it is possible to use your mobile abroad	You are afraid to lose your mobile while travelling abroad	Other (SPONTANEOUS)	DK
EU25	3032	54%	23%	9%	4%	7%	3%
BE	87	56%	31%	5%	1%	4%	2%
CZ	160	58%	21%	9%	9%	3%	1%
DK	211	40%	33%	8%	2%	12%	4%
D-W	156	68%	20%	2%	3%	6%	1%
DE	257	69%	18%	2%	4%	6%	1%
D-E	116	71%	12%	2%	7%	6%	2%
EE	66	33%	25%	18%	2%	16%	7%
EL	79	39%	27%	20%	6%	8%	-
ES	90	62%	22%	9%	2%	3%	3%
FR	159	44%	22%	19%	1%	10%	4%
IE	94	45%	21%	8%	5%	3%	18%
IT	46	33%	32%	22%	2%	4%	8%
CY	40	13%	57%	12%	-	10%	9%
LV	88	36%	32%	22%	4%	-	6%
LT	37	52%	5%	13%	3%	17%	10%
LU	31	49%	10%	6%	6%	25%	5%
HU	79	55%	20%	11%	11%	3%	-
MT	19	9%	45%	16%	3%	11%	16%
NL	76	37%	33%	10%	-	19%	1%
AT	215	74%	14%	3%	7%	2%	-
PL	71	71%	10%	7%	6%	3%	4%
PT	78	50%	23%	9%	-	3%	14%
SI	106	58%	28%	2%	3%	6%	2%
SK	196	56%	16%	6%	9%	4%	8%
FI	96	44%	28%	1%	14%	13%	1%
SE	159	31%	26%	11%	9%	19%	4%
UK	253	47%	29%	7%	4%	9%	4%

QB8 Would you use your mobile phone more when abroad in another country if prices were lower?
 (IF 'HAVE A MOBILE PHONE', CODE 1 OR 2 IN QB2a)

	TOTAL	Yes	No	DK
EU25	19519	59%	23%	18%
BE	849	66%	29%	4%
CZ	952	68%	20%	12%
DK	886	63%	26%	10%
D-W	771	57%	29%	14%
DE	1163	58%	29%	13%
D-E	396	59%	30%	11%
EE	856	57%	14%	29%
EL	740	74%	21%	6%
ES	756	53%	12%	35%
FR	791	61%	26%	12%
IE	870	58%	12%	29%
IT	850	50%	18%	32%
CY	410	67%	16%	17%
LV	849	73%	9%	18%
LT	764	64%	11%	26%
LU	449	75%	17%	8%
HU	723	46%	20%	34%
MT	421	78%	6%	16%
NL	924	56%	36%	8%
AT	823	57%	24%	18%
PL	639	72%	12%	16%
PT	767	47%	19%	34%
SI	872	71%	21%	8%
SK	828	67%	15%	18%
FI	927	60%	29%	11%
SE	963	59%	30%	11%
UK	1107	64%	29%	6%

QB9.1 Please tell me to what extent you agree or disagree with the following statements.

You have a good idea of the price you pay when making or receiving a phone call when you are abroad in another EU country

	TOTAL	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Not applicable (SPONTANEOUS)	DK	Agree	Disagree
EU25	24565	10%	20%	18%	23%	14%	15%	29%	42%
BE	1003	8%	21%	25%	32%	13%	2%	29%	57%
CZ	1091	11%	32%	22%	15%	16%	5%	42%	37%
DK	1003	14%	18%	31%	15%	22%	-	32%	45%
D-W	1018	15%	24%	24%	27%	2%	9%	39%	50%
DE	1525	14%	25%	24%	27%	2%	8%	39%	51%
D-E	507	11%	26%	25%	30%	1%	7%	38%	54%
EE	1000	8%	17%	13%	17%	32%	13%	25%	30%
EL	1000	7%	14%	15%	40%	18%	5%	21%	56%
ES	1003	5%	11%	14%	24%	18%	28%	16%	38%
FR	1007	7%	15%	17%	28%	14%	18%	23%	45%
IE	1000	12%	25%	15%	19%	13%	16%	37%	33%
IT	1006	8%	20%	14%	17%	10%	31%	28%	31%
CY	503	8%	13%	12%	23%	7%	37%	21%	35%
LV	1015	6%	16%	19%	23%	20%	16%	22%	42%
LT	1000	12%	12%	10%	24%	10%	32%	24%	34%
LU	500	18%	19%	24%	21%	8%	11%	37%	44%
HU	1005	7%	15%	14%	23%	27%	14%	22%	37%
MT	500	10%	20%	15%	22%	10%	25%	29%	36%
NL	1018	17%	18%	20%	33%	6%	6%	35%	53%
AT	1016	12%	30%	22%	18%	8%	10%	42%	40%
PL	1000	5%	18%	17%	19%	34%	7%	23%	36%
PT	995	7%	14%	15%	17%	34%	13%	21%	32%
SI	1031	15%	23%	19%	22%	10%	10%	38%	42%
SK	1023	9%	33%	24%	22%	5%	8%	42%	46%
FI	1000	6%	18%	31%	30%	5%	11%	24%	60%
SE	1013	15%	25%	18%	25%	2%	14%	40%	43%
UK	1308	12%	23%	19%	17%	15%	13%	35%	36%

QB9.2 Please tell me to what extent you agree or disagree with the following statements.

The EU should make sure that prices for sending and receiving text messages (SMS, texto, etc.) on mobile phones when travelling in other EU countries are not unreasonably higher than those at home

	TOTAL	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Not applicable (SPONTANEOUS)	DK	Agree	Disagree
EU25	24565	43%	25%	4%	3%	11%	13%	68%	7%
BE	1003	55%	23%	6%	4%	9%	2%	78%	11%
CZ	1091	48%	26%	6%	2%	14%	5%	74%	8%
DK	1003	50%	21%	9%	3%	16%	-	71%	13%
D-W	1018	58%	22%	3%	4%	2%	12%	79%	6%
DE	1525	58%	22%	3%	4%	2%	11%	80%	7%
D-E	507	60%	24%	5%	5%	1%	6%	83%	9%
EE	1000	35%	17%	4%	4%	29%	12%	52%	7%
EL	1000	61%	26%	4%	3%	3%	3%	87%	7%
ES	1003	29%	23%	4%	3%	14%	27%	52%	7%
FR	1007	37%	30%	2%	2%	12%	17%	66%	5%
IE	1000	49%	24%	2%	1%	8%	16%	73%	3%
IT	1006	34%	30%	7%	2%	9%	18%	64%	9%
CY	503	44%	25%	3%	2%	4%	23%	69%	4%
LV	1015	33%	19%	5%	5%	21%	17%	52%	11%
LT	1000	38%	16%	3%	4%	9%	30%	54%	7%
LU	500	63%	19%	5%	2%	5%	6%	82%	7%
HU	1005	32%	22%	4%	4%	23%	15%	54%	8%
MT	500	52%	28%	1%	2%	4%	13%	80%	3%
NL	1018	60%	20%	4%	5%	5%	5%	80%	10%
AT	1016	43%	30%	7%	3%	7%	11%	74%	9%
PL	1000	37%	18%	4%	3%	29%	9%	55%	7%
PT	995	23%	32%	3%	2%	25%	14%	55%	5%
SI	1031	55%	26%	3%	1%	7%	8%	82%	4%
SK	1023	45%	36%	6%	3%	3%	8%	81%	9%
FI	1000	44%	29%	9%	4%	5%	9%	73%	12%
SE	1013	58%	17%	4%	6%	2%	12%	76%	10%
UK	1308	42%	28%	4%	3%	13%	11%	69%	7%

QB9.3 Please tell me to what extent you agree or disagree with the following statements.

The EU should make sure that prices for making and receiving calls on mobile phones when travelling in other EU countries are not a lot higher than those at home

	TOTAL	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Not applicable (SPONTANEOUS)	DK	Agree	Disagree
EU25	24565	45%	25%	4%	3%	11%	13%	70%	6%
BE	1003	58%	23%	6%	2%	9%	2%	81%	9%
CZ	1091	50%	26%	5%	3%	13%	4%	75%	8%
DK	1003	52%	21%	10%	3%	14%	-	73%	13%
D-W	1018	62%	19%	2%	3%	2%	11%	82%	5%
DE	1525	63%	20%	2%	3%	2%	10%	82%	5%
D-E	507	64%	22%	3%	3%	1%	7%	86%	7%
EE	1000	39%	17%	3%	3%	28%	10%	56%	6%
EL	1000	62%	28%	1%	3%	3%	2%	90%	4%
ES	1003	30%	24%	4%	3%	14%	25%	54%	7%
FR	1007	40%	28%	3%	2%	12%	16%	68%	5%
IE	1000	53%	19%	2%	2%	8%	16%	72%	4%
IT	1006	35%	32%	6%	2%	8%	16%	67%	9%
CY	503	46%	27%	1%	1%	3%	23%	73%	2%
LV	1015	36%	18%	4%	4%	21%	18%	54%	8%
LT	1000	43%	15%	3%	2%	9%	29%	58%	5%
LU	500	65%	20%	4%	1%	4%	6%	85%	5%
HU	1005	36%	21%	3%	3%	22%	15%	57%	7%
MT	500	54%	28%	0%	1%	3%	13%	82%	2%
NL	1018	63%	20%	4%	4%	4%	4%	83%	9%
AT	1016	46%	31%	4%	2%	6%	10%	77%	6%
PL	1000	38%	20%	3%	2%	27%	9%	58%	5%
PT	995	25%	31%	3%	2%	24%	14%	56%	5%
SI	1031	56%	25%	2%	1%	7%	9%	81%	3%
SK	1023	46%	34%	6%	4%	3%	8%	80%	9%
FI	1000	44%	31%	7%	3%	5%	10%	75%	10%
SE	1013	61%	16%	4%	5%	2%	11%	78%	10%
UK	1308	45%	27%	4%	2%	13%	9%	72%	6%

Questionnaire

ASK QB ONLY IN EU25 - OTHERS GO TO QC - CY(tcc) GO TO DEMOGRAPHICS

Let's move on to another topic.

QB1 Compared to the prices for local mobile phone services, do you think that the cost of...?

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Lower	At the same level	Higher	Excessive (SPONTANEOUS)	DK
--	------------	-------	-------------------	--------	-------------------------	----

(452)	1	Making and receiving calls on your mobile phone while abroad in other countries is ...	1	2	3	4	5
-------	---	--	---	---	---	---	---

(453)	2	Sending and receiving text messages (SMS - USE APPROPRIATE NAMING IN EACH COUNTRY) on your mobile phone while abroad in other countries is ...	1	2	3	4	5
-------	---	--	---	---	---	---	---

(454)	3	Using advanced mobile data communications services such as accessing websites for downloading audio\ video content, sending and receiving e-mails while abroad in other countries is ...	1	2	3	4	5
-------	---	--	---	---	---	---	---

NEW

POSER QB UNIQUEMENT EN UE25 - LES AUTRES ALLER EN QC - CY(tcc) ALLER AUX DEMOGRAPHIQUES

Passons à un autre sujet.

QB1 Par rapport aux prix des services de téléphonie mobile locaux, pensez-vous que le prix pour ... ?

(MONTRER CARTE AVEC ECHELLE – UNE REPOSE PAR LIGNE)

	(LIRE)	Moins élevé	Le même	Plus élevé	Excessif (SPONTANÉ)	NSP
--	--------	-------------	---------	------------	---------------------	-----

(452)	1	Emettre et recevoir des appels sur votre téléphone mobile lors de déplacements à l'étranger est ...	1	2	3	4	5
-------	---	---	---	---	---	---	---

(453)	2	Envoyer et recevoir des messages textes (SMS - ADAPTER LE NOM POUR CHAQUE PAYS) sur votre téléphone mobile lors de déplacements à l'étranger est ...	1	2	3	4	5
-------	---	--	---	---	---	---	---

(454)	3	Utiliser des services de communication mobile avancés tels que l'accès à des sites Web pour télécharger du contenu audio\ vidéo, pour envoyer et recevoir des courriers électroniques lors de déplacements à l'étranger est ...	1	2	3	4	5
-------	---	---	---	---	---	---	---

NEW

QB2a Please tell me which of the following situation applies to you.

QB2a Pourriez-vous me dire quelles situations parmi les suivantes s'appliquent à vous ?

(READ OUT – MULTIPLE ANSWERS POSSIBLE)

(LIRE – PLUSIEURS REPONSES POSSIBLES)

(455-458)

(455-458)

You have a private mobile phone	1,
You have a business mobile phone	2,
You do not have a mobile phone	3,
DK	4,

Vous possédez un téléphone mobile personnel	1,
Vous possédez un téléphone mobile professionnel	2,
Vous ne possédez pas de téléphone mobile	3,
NSP	4,

NEW

NEW

ASK QB2b to QB8 IF "HAVE A MOBILE PHONE", CODE 1 or 2 in Qb2a - OTHERS GO TO QB9

POSER QB2b à QB8 SI "POSSEDE UN TELEPHONE MOBILE", CODE 1 ou 2 en QB2a - LES AUTRES ALLER EN QB9

QB2b And do you have a mobile phone access on the basis of a contract (billed afterwards) or on a pre-paid arrangement (pre-paid cards)?

QB2b Et avez-vous un accès à la téléphonie mobile sur base d'un contrat (facturation) ou d'une carte prépayée ?

(READ OUT – ONE ANSWER ONLY)

(LIRE – UNE SEULE REPONSE)

(459)

(459)

Mobile phone access on the basis of a contract (billed afterwards)	1
Mobile phone access on a pre-paid arrangement (pre-paid cards)	2
Both (SPONTANEOUS)	3
DK	4

Un accès à la téléphonie mobile sur base d'un contrat (facturation)	1
Un accès à la téléphonie mobile avec une carte prépayée	2
Les deux (SPONTANE)	3
NSP	4

NEW

NEW

--

--

QB3 In the last 12 months have you...?

QB3 Au cours des 12 derniers mois, avez-vous ... ?

(ONE ANSWER PER LINE)

(UNE REPONSE PAR LIGNE)

	(READ OUT)	Yes, on several occasions	Yes, once or twice only	No
--	------------	---------------------------	-------------------------	----

	(LIRE)	Oui, plusieurs fois	Oui, une ou deux fois seulement	Non
--	--------	---------------------	---------------------------------	-----

(460)	1	Visited another EU country for private purposes	1	2	3
(461)	2	Visited another EU country for business purposes	1	2	3
(462)	3	Visited a country outside of the EU	1	2	3

(460)	1	Visité un autre pays de l'UE pour des raisons personnelles	1	2	3
(461)	2	Visité un autre pays de l'UE pour des raisons professionnelles	1	2	3
(462)	3	Visité un pays en dehors de l'UE	1	2	3

NEW

NEW

--

--

QB4 Which of the following mobile communication services do you use most when you are abroad in another country?

QB4 Parmi les services de communication mobile suivants, lesquels utilisez-vous le plus souvent lors de déplacement dans un autre pays ?

(SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE)

(MONTRER CARTE – LIRE – PLUSIEURS REPONSES POSSIBLES)

	(463-472)
Making voice calls	1,
Receiving voice calls	2,
Sending text messages (SMS - USE APPROPRIATE NAMING IN EACH COUNTRY)	3,
Receiving text messages (SMS - USE APPROPRIATE NAMING IN EACH COUNTRY)	4,
Advanced mobile data communications services like accessing websites for downloading audio\ video content, sending and receiving e-mails	5,
You do not take your mobile phone with you when you are visiting a foreign country	6,
You normally switch off your mobile phone when abroad	7,
Never go abroad (SPONTANEOUS)	8,
Other (SPONTANEOUS)	9,
DK	10,

	(463-472)
Emettre des appels	1,
Recevoir des appels	2,
Envoyer des messages textes (SMS - ADAPTER LE NOM POUR CHAQUE PAYS)	3,
Recevoir des messages textes (SMS - ADAPTER LE NOM POUR CHAQUE PAYS)	4,
Utiliser des services de communication mobile avancés tels que l'accès à des sites Web pour télécharger du contenu audio\ vidéo, pour envoyer et recevoir des courriers électroniques	5,
Vous n'empportez pas votre téléphone mobile avec vous lors de déplacements à l'étranger	6,
Normalement, vous éteignez votre téléphone mobile lors de déplacements à l'étranger	7,
Ne va jamais à l'étranger (SPONTANE)	8,
Autre (SPONTANE)	9,
NSP	10,

NEW

NEW

ASK QB5 and QB6 IF "USES MOBILE COMMUNICATION SERVICES WHILE ABROAD",
CODE 1 to 5 in QB4 - OTHERS GO TO QB7

POSER QB5 et QB6 SI "UTILISE DES SERVICES DE COMMUNICATIONS MOBILES LORS
DE DEPLACEMENTS A L'ETRANGER", CODE 1 à 5 en QB4 - LES AUTRES ALLER EN
QB7

QB5 How would you best describe the use of your mobile phone while abroad in another country?

QB5 Comment décririez-vous le mieux l'utilisation de votre téléphone mobile lors de déplacements à l'étranger ?

(SHOW CARD – ONE ANSWER ONLY)

(MONTER CARTE – UNE SEULE REPONSE)

	(473)
You use the same SIM card and use the mobile as often as at home	1
You use the same SIM card and use the mobile less often than at home	2
You use the same SIM card and use the mobile more often than at home	3
You purchase a SIM card in the country you are visiting	4
DK	5

	(473)
Vous utilisez la même carte SIM et vous utilisez votre téléphone mobile aussi souvent que chez vous	1
Vous utilisez la même carte SIM et vous utilisez votre téléphone mobile moins souvent que chez vous	2
Vous utilisez la même carte SIM et vous utilisez votre téléphone mobile plus souvent que chez vous	3
Vous achetez une carte SIM dans le pays que vous visitez	4
NSP	5

NEW

NEW

ASK QB6 IF "USE MOBILE PHONE LESS FREQUENTLY (or shorter calls\ SMS) WHILE
ABROAD", CODE 2 in QB5 - OTHERS GO TO QB8

POSER QB6 SI "UTILISE TELEPHONE MOBILE MOINS SOUVENT (ou appels\ SMS plus
courts) LORS DE DEPLACEMENTS A L'ETRANGER", CODE 2 en QB5 - LES AUTRES
ALLER EN QB8

QB6 Among the following list, what is the most important reason for using your mobile phone less frequently while abroad in another country?

QB6 Parmi les éléments suivants, quelle est la raison principale pour utiliser votre téléphone mobile moins souvent lors de déplacements à l'étranger ?

(ROTATION – ONE ANSWER ONLY)

(ROTATION – UNE SEULE REPONSE)

	(474)
The cost is too high	1
You do not wish to be disturbed when travelling abroad	2
You are afraid to lose your mobile while travelling abroad	3
Other (SPONTANEOUS)	4
DK	5

	(474)
Les coûts sont trop élevés	1
Vous ne souhaitez pas être dérangé(e) lors de déplacements à l'étranger	2
Vous avez peur de perdre votre téléphone mobile lors de déplacements à l'étranger	3
Autre (SPONTANE)	4
NSP	5

NEW

NEW

ASK QB7 IF "DO NOT USE MOBILE COMMUNICATION SERVICES WHILE ABROAD",
CODE 6 or 7 in QB4 - OTHERS GO TO QB8

POSER QB7 SI "N'UTILISE PAS DE SERVICES DE COMMUNICATION MOBILE LORS DE
DEPLACEMENTS A L'ETRANGER", CODE 6 ou 7 en QB4 - LES AUTRES ALLER EN QB8

QB7 Among the following list, what is the most important reason for not using your mobile phone while abroad in another country?

QB7 Parmi les éléments suivants, quelle est la raison principale pour ne pas utiliser votre téléphone mobile lors de déplacements à l'étranger ?

(ROTATION – ONE ANSWER ONLY)

(ROTATION – UNE SEULE REPONSE)

	(475)
The cost is too high	1
You do not wish to be disturbed when travelling abroad	2
You are not sure if it is possible to use your mobile abroad	3
You are afraid to lose your mobile while travelling abroad	4
Other (SPONTANEOUS)	5
DK	6

	(475)
Les coûts sont trop élevés	1
Vous ne souhaitez pas être dérangé(e) lors de déplacements à l'étranger	2
Vous n'êtes pas sûr(e) qu'il soit possible d'utiliser votre téléphone mobile à l'étranger	3
Vous avez peur de perdre votre téléphone mobile lors de déplacements à l'étranger	4
Autre (SPONTANE)	5
NSP	6

NEW

NEW

ASK QB8 IF "HAVE A MOBILE PHONE", CODE 1 or 2 in QB2a - OTHERS GO TO QB9

POSER QB8 SI "POSSEDE UN TELEPHONE MOBILE", CODE 1 ou 2 en QB2a - LES
AUTRES ALLER EN QB9

QB8 Would you use your mobile phone more when abroad in another country if prices were lower?

QB8 Utiliseriez-vous plus votre téléphone mobile lors de déplacements à l'étranger si les prix étaient moins élevés ?

	(476)
Yes	1
No	2
DK	3

	(476)
Oui	1
Non	2
NSP	3

NEW

NEW

ASK ALL

A TOUS

QB9 Please tell me to what extent you agree or disagree with the following statements.

QB9 Pourriez-vous me dire dans quelle mesure vous êtes d'accord ou pas d'accord avec les propositions suivantes.

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

(MONTRER CARTE AVEC ECHELLE – UNE REPONSE PAR LIGNE)

	(READ OUT)	Total ly agre e	Tend to agre e	Tend to disa gree	Total ly disa gree	Not appli cabl e (SP ONT ANE OUS)	DK
--	------------	--------------------------	-------------------------	----------------------------	-----------------------------	--	----

	(LIRE)	Tout à fait d'acc ord	Plutôt d'acc ord	Plutôt pas d'acc ord	Pas du tout d'acc ord	Ne s'ap pliqu e pas (SP ONT ANE)	NSP
--	--------	--------------------------------	------------------------	-------------------------------	-----------------------------------	---	-----

(477)	1	You have a good idea of the price you pay when making or receiving a phone call when you are abroad in another EU country	1	2	3	4	5	6
(478)	2	The EU should make sure that prices for sending and receiving text messages (SMS - USE APPROPRIATE NAMING IN EACH COUNTRY) on mobile phones when travelling in other EU countries are not unreasonably higher than those at home	1	2	3	4	5	6
(479)	3	The EU should make sure that prices for making and receiving calls on mobile phones when travelling in other EU countries are not a lot higher than those at home	1	2	3	4	5	6

(477)	1	Vous avez une bonne idée du prix que vous payez pour émettre ou recevoir des appels sur votre téléphone mobile lors de déplacements dans d'autres pays de l'UE	1	2	3	4	5	6
(478)	2	L'UE devrait s'assurer que les prix pour envoyer et recevoir des messages textes (SMS - ADAPTER LE NOM DANS CHAQUE PAYS) sur des téléphones mobiles lors de déplacements dans d'autres pays de l'UE ne soient pas déraisonnablement plus élevés que chez vous	1	2	3	4	5	6
(479)	3	L'UE devrait s'assurer que les prix pour émettre et recevoir des appels sur des téléphones mobiles lors de déplacements dans d'autres pays de l'UE ne soient pas beaucoup plus élevés que chez vous	1	2	3	4	5	6

NEW

NEW