

SPECIAL EUROBAROMETER 356

Roaming in 2010

REPORT

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Special Eurobarometer 356

ROAMING IN 2010

Conducted by TNS Opinion & Social at the request
of Directorate-General Information Society
and Media

Survey co-ordinated by Directorate-General
Communication

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INTRODUCTION

In autumn 2006¹, 79% of mobile users who had travelled within the EU reported that they made use of roaming services. However most of them changed their usage pattern compared to their everyday mobile phone usage, i.e. they used their mobile phone less and limited the selection of services due to the high cost of roaming. Moreover, a significant proportion simply switched off their mobile phone or left it at home altogether. This was the reason why an overwhelming majority of EU citizens agreed that the EU should step in to eliminate the excessive roaming charges.

At that time no EU-wide regulation had been implemented - and many travellers found an unpleasant surprise in their mobile phone invoice after a holiday in another EU country. The cost of roaming was arbitrarily higher abroad than at home, and it varied widely between countries. This represented an important obstacle hindering the functioning of the EU internal market.

The first EU-wide regulation on roaming² was adopted in June 2007. It was further amended in June 2009³ with an extension in time and changes in scope to cover SMS and data roaming services, as the first review of the regulation revealed that competition was not yet working satisfactorily. The current Roaming Regulation is valid until 30 June 2012.

The European Commission is obliged to monitor and report on the functioning of the Regulation. The full review of the regulation is expected by 30 June 2011 and an interim report on the Commission's monitoring activities was released in June 2010⁴. The European Regulators Group (ERG) and its successor, the Body of European Regulators for Electronic Communications (BEREC) have in cooperation with the Commission collected a substantial amount of data on roaming tariffs and compliance with the Roaming Regulation in the Member States.⁵ However, apart from informal dialogue between the Commission services and consumers' representatives, the voice of consumers themselves about their perceptions of the changes has not yet been heard.

¹ Special Eurobarometer 269 'Roaming'
http://ec.europa.eu/information_society/activities/roaming/docs/eurobarometer/eurobarometer_en.pdf

² Regulation (EC) No 717/2007 of the European Parliament and of the Council of 27 June 2007 on roaming on public mobile telephone networks within the Community, OJ L 171, 29.6.2007

³ Regulation (EC) No 544/2009 of the European Parliament and of the Council of 18 June 2009 amending Regulation (EC) No 717/2007, OJ L 167, 29.6.2009

⁴ Interim report on the state of development of roaming services within the European Union
http://ec.europa.eu/information_society/activities/roaming/docs/interim_report2010.pdf

⁵ For all ERG/BEREC reports, see: http://www.erg.eu.int/documents/index_en.htm.

It is against this background that the European Commission (DG INFSO) commissioned this second Eurobarometer survey on roaming in order to supplement the review of the functioning of the current Roaming Regulation. It follows the Roaming survey carried out in 2006 and thus provides an opportunity to monitor the changes in consumer behaviour and attitudes prior to and since the Regulation.

The interim report on the Commission's monitoring activities concluded that many positive developments had been demonstrated in recent years: prices of voice calls, SMS and data roaming have dropped significantly and the volumes of use of these services have continued to grow despite the negative influence of the recent economic recession. In fact, the cost for roaming calls has fallen by more than 70% since 2005 and sending a text message between EU Member States costs 60% less. However, the report also states that consumers still do not enjoy significantly lower tariffs than those imposed by EU rules and therefore competition in the EU's roaming market is not yet strong enough to provide better choice and even better rates to consumers.

This present study looks at these developments from the consumer perspective after the implementation of the first and the second Regulation: do Europeans still change their usage pattern or switch off their phones while travelling within the EU? Do they still think that the cost of roaming is unreasonable? Are they aware of the positive changes since 2006? And has this led to a less limited use of roaming services? In other words, the results of this survey give an insight into actual consumer behaviour and how it has changed in the last 5 years, during which the Roaming Regulations have been adopted.

Finally, it is necessary to take into account the broader economic context in which this present survey took place. Europe has recently gone through possibly the worst economic recession since the 1930s. This has not only profoundly undermined consumer confidence and changed consumer behaviour but also negatively influenced public opinion on many other aspects of life. As the analysis in the pages that follow will show, for example, Europeans travel significantly less now than five years ago which obviously means that there are fewer potential users of roaming services today than in 2006. It is impossible to assess in this context to what extent the opinions of Europeans on the roaming charges are influenced by the economic reality, but the reader is asked to keep this background in mind when evaluating the results of this survey.

NOTE TO THE READER

The report details the EU-wide findings as well as country-by-country breakdowns. Where relevant, comparisons are made with the previous 2006 survey and background information is introduced to place the results in a wider context. Socio-demographic variables are also taken into account in the analysis.

The primary sample analysed is those EU citizens who have a mobile phone and have travelled within the last 5 years in the EU, in other words, the group of potential roaming users. This sample is described in the first chapter of the report. Furthermore, the basis of analysis varies for some questions that concern specific roaming services. In some cases, this leads to small bases in a number of countries, and the country-by-country results can be only taken as indicative and not statistically reliable. In order to ease the reading of the report, the questions analysed are presented at the beginning of each chapter together with the definition of the basis of analysis.

Throughout the report, the data are broken down by two additional groupings besides the socio-demographic categories: by respondents' **travelling patterns** and by their **user patterns of roaming services**.

The first grouping allows us to analyse how the use of roaming services and opinions on roaming differ between those who have travelled both prior to (4-5 years ago) and since the Regulation (within last 12 months) and those who have travelled during only one of these periods. Those who are frequent travellers obviously have first hand experience of the changes in the roaming sector in the last 5 years and are thus the best placed to give an indication of the impact of the Regulation on consumer behaviour and perception.

User patterns refer to the groups of respondents that use a certain roaming service. It is used to analyse, for example, whether users of voice calls have different opinions than users of SMS services. It should be noted that these categories are not exclusive: users of voice calls can also be users of SMS services.

Comparisons are made with the previous study that was carried out in 2006. **The basis for comparisons is those respondents who report having travelled within the last 12 months prior to the interview in the 2006 survey and in this present survey in 2010.** The figures for the EU average are based on the 25 Member States in 2006 and on the 27 Member States in 2010 as Romania and Bulgaria joined the EU in 2007.

The Member States are represented by their official abbreviations. The abbreviations used in this report correspond to:

ABBREVIATIONS	
EU27	European Union – 27 Member States
EU25	European Union – 25 Member States before Bulgaria and Romania joined in 2007.
EU15	The fifteen Member States that were EU members prior to the accession of ten candidate countries on 1 May 2004
NMS12	The twelve Member States that became EU members in the 2004 or 2007 enlargement waves are referred to as NMS12 (New Member States 12)
DK/NA	Don't know / No answer
BE	Belgium
BG	Bulgaria
CZ	Czech Republic
DK	Denmark
DE	Germany
EE	Estonia
EL	Greece
ES	Spain
FR	France
IE	Ireland
IT	Italy
CY	Republic of Cyprus
LT	Lithuania
LV	Latvia
LU	Luxembourg
HU	Hungary
MT	Malta
NL	The Netherlands
AT	Austria
PL	Poland
PT	Portugal
RO	Romania
SI	Slovenia
SK	Slovakia
FI	Finland
SE	Sweden
UK	The United Kingdom

Over 26,500 people were interviewed in August and September 2010 in the 27 Member States of the European Union. Interviews were conducted face-to-face in respondents' homes in their respective national languages. Full technical details of the survey are annexed to the end of this report.

MAIN FINDINGS

Mobile phones are increasingly becoming not only *the most important* but also the *only* means of voice telephony for Europeans. 87% of respondents have a mobile phone compared to 80% in 2006 while 26% now use it exclusively in comparison to 20% in 2006.

Consequently, the group of potential users of roaming services is also constantly growing, both in terms of size and heterogeneity. The differences in mobile phone penetration between countries are shrinking and even the oldest age group, which showed significantly lower levels of mobile phone usage in 2006, are quickly catching up with their younger counterparts, with 71% now having a mobile phone compared to 57% in 2006.

Significantly fewer Europeans report having travelled in the EU in this present survey than in 2006. This is undoubtedly a consequence of the economic downturn. In 2010, 48% of mobile phone users say they have travelled within last 4-5 years and 28% have travelled both prior to and since the Roaming Regulation.

The results do not show significant evolutions in the proportion of respondents using different types of services, with the exception of Internet-related services, which seem to be used more now than in 2006. European mobile phone users continue to favour voice calls (55%) and text message services (52%) while abroad with 10% making use of Internet related services. The increased usage of roaming internet-related services reflects the recent market uptake of mobile data services.

While overall the proportion of roaming service users has remained stable since 2006, **a higher proportion of frequent travellers are now using their mobile phones while abroad**, possibly because they have first-hand experience of the recent price decreases.

Furthermore, the respondents are using roaming services to a greater extent than in 2006. Significant increases can be observed in the frequency of making (32%) and receiving voice calls (31%) and in particular of sending text messages (43%) since 2006. Young people in particular are significantly more likely to use these roaming services now than in 2006.

However, **an overwhelming 72% of mobile users continue to limit their mobile voice calls while abroad because they are concerned about the costs.** It is also implied that some respondents substitute their voice calls by text messages and Internet-related services while abroad, i.e. they change their user pattern in terms of the type of services they use. Young respondents are particularly prone to cut down their voice calls while travelling. Among the 10% of mobile users who reported currently using data roaming services while abroad, the **general tendency appears to be that the price of using data services is not regarded as fair.**

The perceived excessive roaming costs still appear to discourage Europeans of using roaming services, even if a majority of mobile phone users agrees that these costs have decreased. Among frequent travellers, 61% are aware of the positive price developments that have occurred over the last four years.

Awareness of lower roaming prices is obviously strongly linked to first-hand experiences during the period of change: those who travel frequently and use any of the roaming services are significantly more likely to believe that costs have fallen than those who have not travelled both prior to and since the Regulation and those who avoid using their mobile phone while abroad. The oldest age group in particular tends to be less knowledgeable about recent developments.

1 DESCRIPTION OF TARGET POPULATION

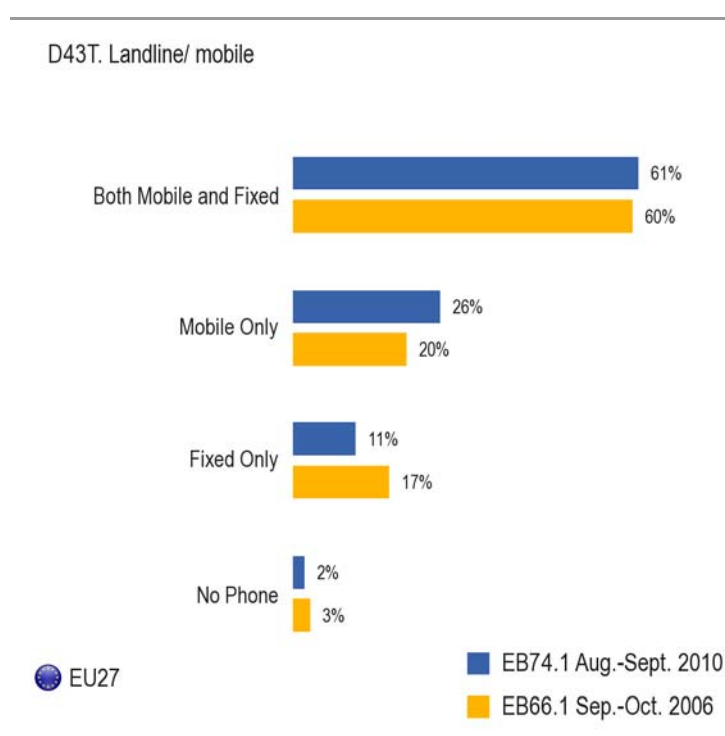
This first chapter describes the target population of the survey. It firstly looks at mobile phone usage and secondly at the frequency with which mobile phone users travel in the EU. This chapter therefore defines the group that potentially uses roaming services and identifies differences between countries and across socio-demographic categories.

1.1 Mobile phone usage in Europe

*Question: Q43a Do you own a fixed telephone in your household?
Q43b Do you own a personal mobile telephone?*

Base: Respondents aged 15+ in each Member State

In summer 2010, **87% of citizens of the EU report that they have a mobile phone**. Just over a quarter (26%) only have a mobile phone ('mobile only') while 61% have both a fixed line in their household and a personal mobile phone. Only 13% of respondents do not have a mobile phone, either only having a landline in their household (11%) or they do not have a telephone at all (2%).



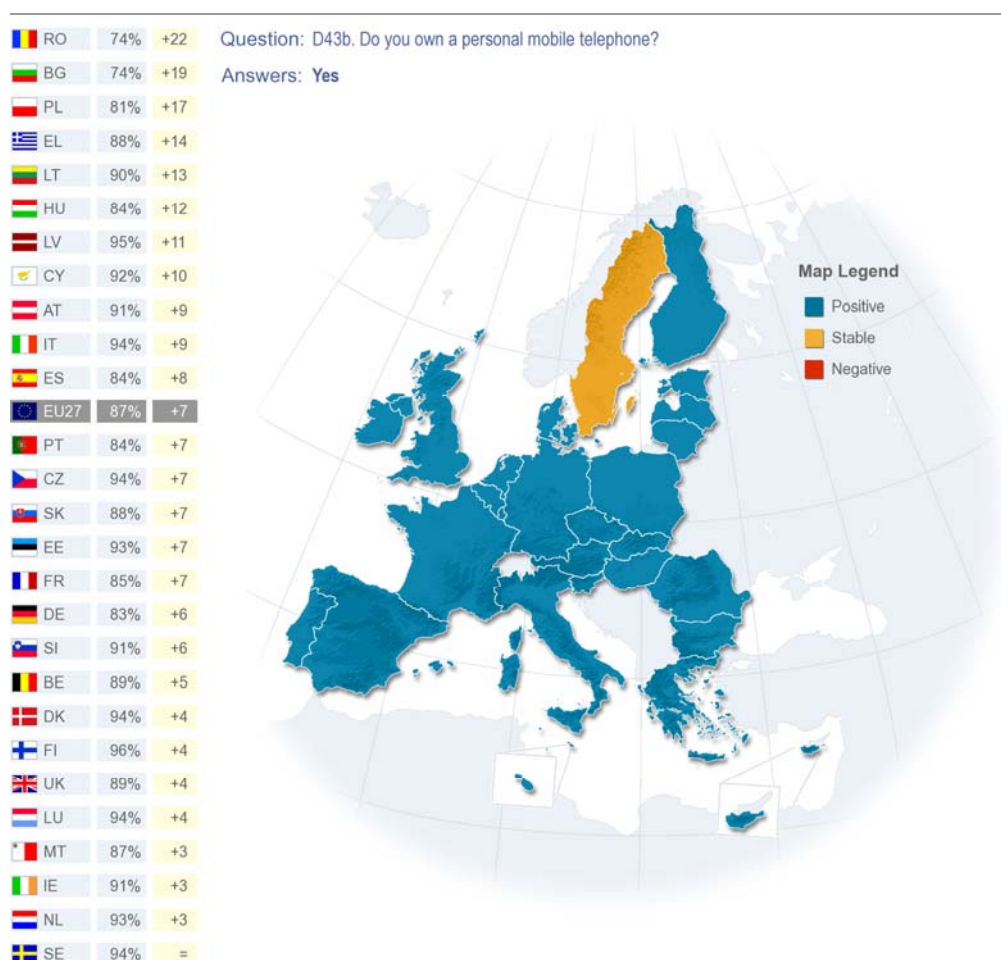
According to the findings of the two Eurobarometer surveys on Roaming in 2006 and 2010, the usage of mobile phones in the EU has increased by 7 percentage points since 2006. However not only is overall mobile penetration growing, but the proportion of Europeans exclusively using a mobile phone is significantly higher: in 2006 20% of Europeans had only a mobile phone while today this figure is 26%.

In other words, a mobile phone is increasingly becoming not only *the most important* but also the *only* means of voice telephony for Europeans.

In 2010 in nearly all Member States, over 80% of the population have a mobile phone. The only two exceptions are Bulgaria and Romania but even in these countries three-quarters of the public are mobile phone users. **The proportion of mobile phone users has increased in every country since 2006** with the exception of Sweden where mobile penetration was already nearly universal in 2006 (94%).

The strongest positive developments since 2006 are observed in Romania and Bulgaria (up 22 and 19 points respectively), followed by a number of other Member States that joined the EU recently: Poland, Lithuania, Hungary, Latvia, Cyprus as well as an EU15 country Greece. The proportion of mobile phone users has indeed risen faster in the Member States which joined the EU recently (+10 points) than in EU15 (+7).

This reflects the overall trend of recent years: **mobile phone usage is becoming more universal across Europe**. While in 2006 the range of mobile penetration extended from 52% in Romania to 94% in Sweden, in this present survey this gap is significantly smaller, from 74% in Bulgaria and Romania to 96% in Finland.








Another interesting pattern can be observed between EU15 and NMS12 countries. **The trend towards having only a mobile phone is predominantly a pattern in those Member States that joined the EU recently**. In these countries the majority of mobile phone users have only a mobile phone (48% of total population) while in EU15 countries the pattern is reversed with only 20% of exclusive mobile phone users.

D43T Landline/ mobile

	Mobile Only	Both Mobile	Fixed Only	No Phone
EU15	20%	68%	11%	1%
NMS12	48%	34%	11%	7%

As the overall results have already shown above, mobile phone penetration is becoming more equally balanced across Europe. This evolution can be also observed in the **socio-demographic** analysis.

D43b Do you own a personal mobile telephone?		
	Yes	No
EU27	87%	13%
Sex		
 Male	88%	12%
 Female	85%	15%
Age		
 15-24	97%	3%
25-39	97%	3%
40-54	92%	8%
55 +	71%	29%
Education (End of)		
 15-	69%	31%
16-19	89%	11%
20+	94%	6%
Still studying	97%	3%
Respondent occupation scale		
 Self-employed	93%	7%
Managers	97%	3%
Other white collars	97%	3%
Manual workers	94%	6%
House persons	83%	17%
Unemployed	88%	12%
Retired	68%	32%
Students	97%	3%
Difficulties to pay bills		
Most of the time	79%	21%
From time to time	87%	13%
Almost never	87%	13%

There are relatively small differences in *overall* mobile phone usage by gender, by age within young and working age population (aged 15-55) and occupation within employed and self-employed population. All these groups show higher or equal levels of mobile phone usage than the EU average of 87%.

However, the proportion of mobile phone users is distinctly lower among the oldest age group (71%), retired respondents (68%) and respondents who left education before the age of 15 (69%) - all characteristics that tend to coincide.

This pattern was already witnessed in the previous study in 2006, and these findings are hardly surprising: older people are less likely to have the technical skills needed for, and perhaps have less interest in, owning a mobile phone. However, what is interesting here is the fact that **the proportion of mobile phone users in the oldest age group has increased by 14 points, and among retired respondents by 15 points, since 2006.**

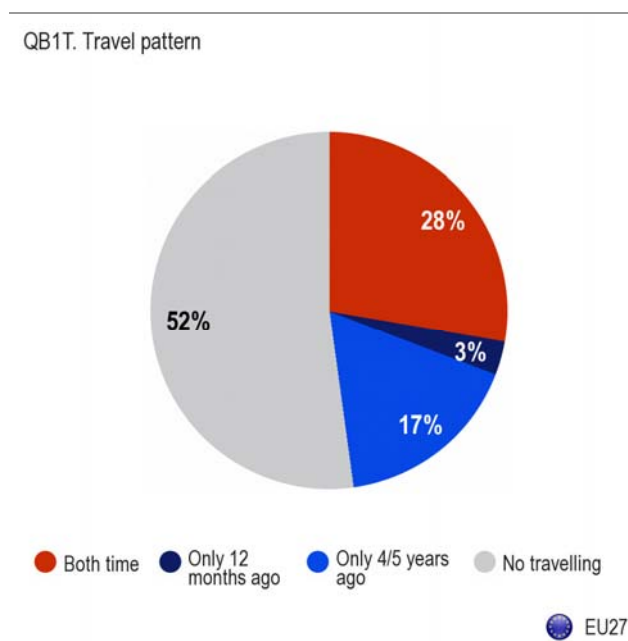
In conclusion, mobile phone usage is increasing across Europe. Differences between countries are evening out and even older Europeans are catching up with their younger counterparts with a significantly higher proportion of the oldest age group having a mobile phone today than in 2006. This in turn implies that **the group of potential users of roaming services is also constantly growing, both in terms of size and heterogeneity.**

1.2 Need for roaming: travelling in Europe

Question: Have you visited another European Union country for private purposes...?
1. Within the past 12 months; 2. Between 4 and 5 years ago

BASE: Respondents who have a mobile phone

48% of European mobile phone users have travelled at least once in the last 5 years, meaning that they have potentially needed roaming services. As the chart below shows, **28% of mobile users have travelled both 12 months ago and 4-5 years ago** and therefore have a comprehensive experience of the development of roaming services prior to and since the Roaming Regulation.



The travelling patterns – and thus the need for roaming services - vary considerably from one country to the next: while 86% of respondents in Denmark and the Netherlands have travelled at least once in last 4-5 years the corresponding figure for the Bulgarian poll is 18%.

These national results can be further illustrated as follows:

- Countries where respondents are most likely to have travelled **in last 4-5 years**: Denmark (86%), the Netherlands (86%), Sweden (81%), Luxembourg (80%) and Finland (70%);
- Countries where respondents are most likely to have **travelled in both periods**: the Netherlands (69%), Denmark (66%), Luxembourg (63%), Sweden (55%) and Finland (49%);
- Countries where respondents are most likely **not to have travelled**: Bulgaria (82%), Greece (77%), Portugal (72%), Spain (70%) and Romania (70%).

QB1T Travel pattern				
	Both time	Only 12 months ago	Only 4/5 years ago	No travelling
EU27	28%	3%	17%	52%
BE	47%	2%	14%	37%
BG	6%	4%	8%	82%
CZ	31%	3%	21%	45%
DK	66%	3%	17%	14%
DE	42%	4%	19%	35%
EE	31%	5%	19%	45%
EL	10%	3%	10%	77%
ES	13%	2%	15%	70%
FR	18%	3%	16%	63%
IE	37%	8%	15%	40%
IT	20%	3%	12%	65%
CY	40%	6%	18%	36%
LT	18%	5%	13%	64%
LV	23%	6%	20%	51%
LU	63%	10%	7%	20%
HU	21%	3%	15%	61%
MT	30%	4%	21%	45%
NL	69%	3%	14%	14%
AT	47%	3%	12%	38%
PL	18%	2%	16%	64%
PT	16%	2%	10%	72%
RO	15%	4%	11%	70%
SI	47%	2%	15%	36%
SK	43%	5%	18%	34%
FI	49%	3%	18%	30%
SE	55%	5%	21%	19%
UK	31%	2%	27%	40%
<div> <div>Highest percentage per country</div> <div>Lowest percentage per country</div> </div> <div> <div>Highest percentage per item</div> <div>Lowest percentage per item</div> </div>				

The results by country illustrate the overall pattern that can be observed across Europe: respondents in Northern and Western Europe are significantly more likely to travel, and also to travel frequently (both periods), than their counterparts in Southern and Eastern Europe. This is confirmed by the figures for EU15 countries and NMS12 countries as shown in the table below.

QB1T Travel pattern				
	Both time	Only 12 months ago	Only 4/5 years ago	No travelling
EU27	28%	3%	17%	52%
NMS12	21%	3%	15%	61%
EU15	30%	3%	17%	50%

Further to the divergent travelling patterns across Europe, another significant pattern emerges in the data when the results are compared to the previous study in 2006: **significantly fewer mobile phone users report having travelled in the EU within 12 months prior to the interview in 2010 than in 2006 (31% against 44% in 2006).**

This result is not surprising given that Europe has gone through possibly the worst economic downturn since the 1930s, which has profoundly impacted not only consumer behaviour but also opinions on many aspects of life. This development has also been recognised in the intermediate evaluation of the Roaming Regulation⁶ and it is one of the most important factors to be kept in mind while reading the results of this survey.

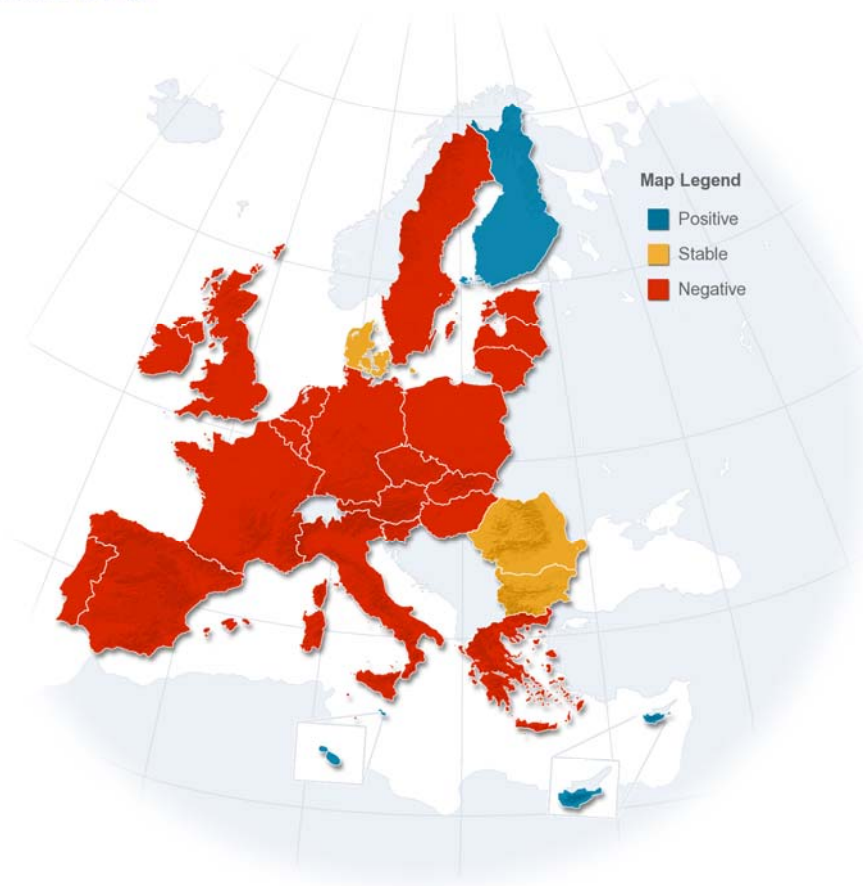
⁶ Interim report on the state of development of roaming services within the European Union
http://ec.europa.eu/information_society/activities/roaming/docs/interim_report2010.pdf

	MT	34%	+5
	CY	46%	+2
	FI	52%	+2
	DK	69%	=
	SE	60%	-1
	SK	48%	-2
	PT	19%	-3
	EE	35%	-3
	LV	28%	-3
	LT	23%	-4
	EL	13%	-5
	NL	72%	-6
	HU	23%	-6
	IT	24%	-7
	SI	49%	-7
	IE	45%	-8
	PL	20%	-8
	DE	47%	-9
	UK	33%	-13
	EU27	31%	-13
	LU	73%	-14
	CZ	34%	-14
	ES	15%	-15
	BE	49%	-19
	FR	21%	-19
	AT	50%	-20
	RO	19%	--
	BG	10%	--

Question: QB1.1. Have you visited another EU country for private purposes...?

Option: Within the past 12 months





Answers: Total 'Yes'



Finally, the following **socio-demographic** patterns can be observed regarding the travelling habits of Europeans that have a mobile phone:

- Males are more likely than females to have travelled in general and also to be frequent travellers, i.e. they have travelled in both periods;
- The differences by age are relatively small: young people are most likely to have travelled although the 25-55 age groups follow closely. Older people are less likely to have travelled but even in this age group 26% can be classified as frequent travellers;
- Managers are by far the most likely group to have travelled and over 50% of this group can be described as frequent travellers.
- The obvious link between household finances and travelling is also established here: those who frequently have problems paying the bills are the most likely not to travel at all.

QB1T Travel pattern

	Both time	Only 12 months ago	Only 4/5 years ago	No travelling
EU27	28%	3%	17%	52%
Sex				
 Male	31%	3%	17%	49%
Female	26%	3%	16%	55%
Age				
 15-24	28%	5%	21%	46%
25-39	30%	3%	17%	50%
40-54	30%	3%	16%	51%
55 +	26%	2%	14%	58%
Education (End of)				
 15-	13%	2%	10%	75%
16-19	24%	3%	17%	56%
20+	43%	3%	19%	35%
Still studying	35%	5%	19%	41%
Respondent occupation scale				
 Self-employed	37%	3%	20%	40%
Managers	54%	3%	17%	26%
Other white collars	33%	3%	20%	44%
Manual workers	23%	3%	17%	57%
House persons	16%	3%	12%	69%
Unemployed	16%	3%	15%	66%
Retired	22%	2%	14%	62%
Students	35%	5%	19%	41%
Difficulties to pay bills				
Most of the time	10%	3%	12%	75%
From time to time	17%	3%	16%	64%
Almost never	37%	3%	17%	43%

2 USE OF MOBILE PHONE SERVICES ABROAD

The second chapter explores *to what extent* European mobile phone users benefit from roaming services and *which type of services* they are the most likely to use.

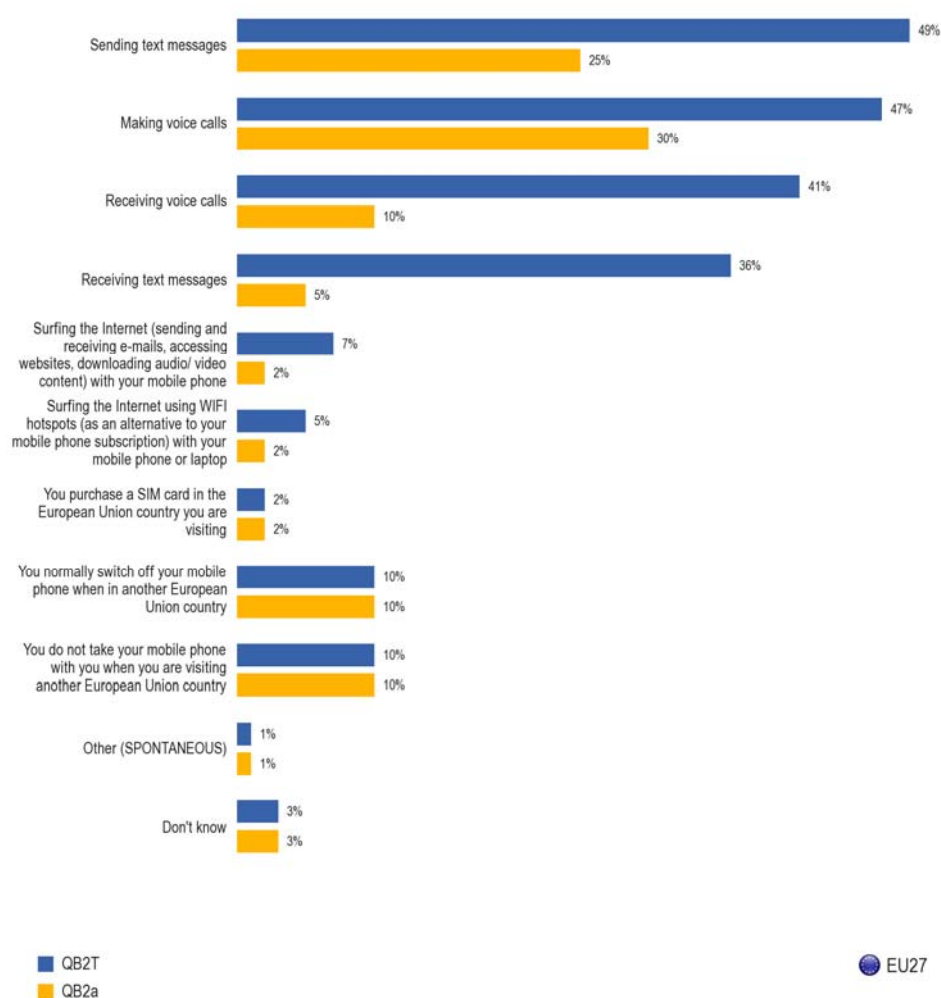
2.1 Actual usage

Question: QB2a Which of the following mobile phone communication services do you use most when visiting another European Union country?

QB2b And which other services do you usually use when visiting another European Union country?

BASE: Respondents who have a mobile phone and have travelled within last 4-5 years

QB2T. Mobile phone communication services used the most in another EU country - TOTAL



The overwhelming majority of European mobile phone users who have travelled at least once within the last 4-5 years use roaming services while abroad. **74% state that they use voice call, text message and/or Internet services.**

However, **over a fifth of Europeans who have a mobile phone do not use roaming services** while travelling within the EU: 10% switch off their mobile phone, a further 10% leave their mobile phone at home altogether and 2% purchase a SIM card in the country they are visiting.

Making voice calls and **sending text messages** are the services that are used by the largest proportions of Europeans (49% and 47% respectively). These two services are also the most likely to be used, with 25% and 30% respectively saying that these are the services that they use the most. Receiving voice calls and text messages follow next with 41% and 36% of Europeans using these services while abroad. 7% use Internet services while 5% say they connect to WIFI hotspots with their mobile phone or laptop.

In this context it is important to see how the use of roaming services varies according to respondents' travel pattern, i.e. to compare those who have travelled only prior to the implementation of regulation, those who have travelled prior to and post-regulation and those who have only travelled within last 12 months.

In the table below it can be observed **that frequent travellers, i.e. those who travelled both within last 12 months and 4-5 years ago, are significantly more likely to use all the services** listed than those who only travelled 4-5 years ago. Furthermore, frequent travellers are also significantly less likely to leave their phone at home or switch off while travelling within Europe.

QB2T Mobile phone communication services used the most in another EU country - TOTAL

	Users of voice services	Users of text services	Users of internet services	Purchasing sim card	Does not use mobile phone
EU27	55%	52%	10%	2%	19%
Travel pattern					
Both time	59%	57%	11%	2%	15%
Only 12 months ago	55%	49%	7%	2%	23%
Only 4/5 years ago	47%	44%	8%	1%	26%
No travelling	-	-	-	-	-

This indirectly implies that respondents who were potential users of roaming services only 4-5 years ago have more limited user patterns than those who are frequent travellers - possibly because the first group have no first-hand experience of roaming after the Roaming Regulation was adopted in 2007.

The roaming usage patterns are broadly similar in all Member States: mobile phone users in all countries are most likely to use voice call and text message services when abroad. However the balance between the uses of the services varies. It should be noted here that the country-specific usage patterns do not necessarily only reflect respondents' attitudes toward roaming but also their everyday mobile phone user profile, e.g. a person who mainly uses text messages is very likely to do so abroad as well.





























The countries can be broadly grouped by roaming usage patterns as follows:

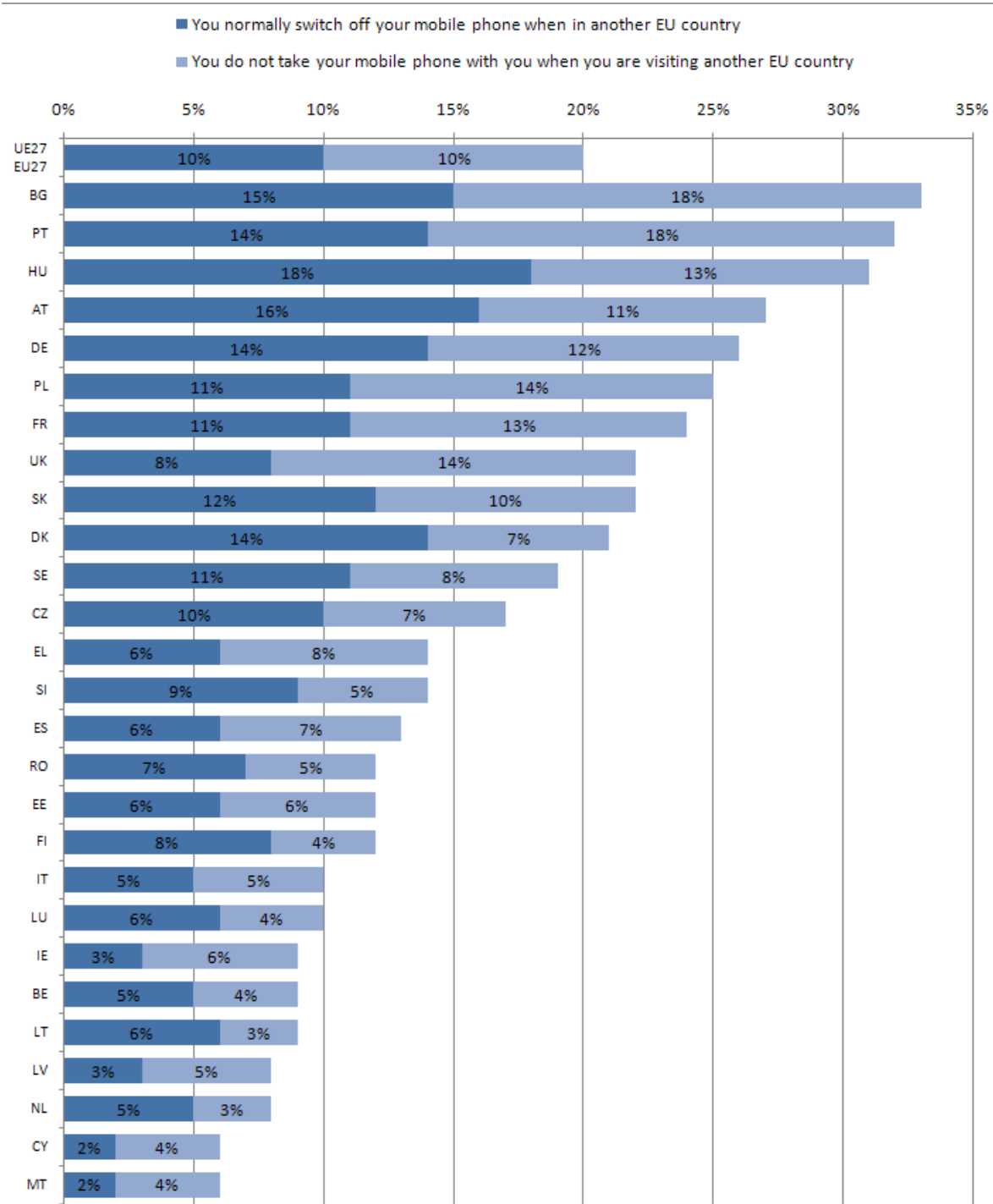
Predominantly using voice calls: Cyprus, Greece, Latvia, Estonia, Romania, Luxembourg, Spain, Slovenia, Germany, Portugal, France and Bulgaria.

Predominantly using text messages: Ireland, Malta, Finland, the Czech Republic, Belgium, Denmark, Sweden, Slovakia and the UK;

Using both voice calls and text messages: the Netherlands, Italy, Lithuania, Austria, Poland and Hungary;

Most likely to switch off or to leave mobile at home: Portugal, Bulgaria, Hungary, Germany, Austria, Poland, France, the UK, Slovakia and Denmark.

QB2T Mobile phone communication services used the most in another EU country -						
		Users of voice services	Users of text services	Users of internet services	Purchasing sim card	Does not use mobile phone
	EU27	55%	52%	10%	2%	19%
	BE	51%	72%	11%	2%	9%
	BG	48%	38%	8%	6%	32%
	CZ	47%	72%	3%	0%	17%
	DK	44%	68%	11%	1%	21%
	DE	58%	42%	6%	2%	26%
	EE	72%	56%	15%	1%	12%
	EL	78%	49%	5%	3%	14%
	ES	63%	37%	15%	4%	14%
	FR	51%	38%	17%	2%	23%
	IE	62%	81%	10%	1%	8%
	IT	60%	55%	6%	4%	9%
	CY	88%	65%	14%	2%	6%
	LT	59%	56%	17%	4%	9%
	LV	73%	55%	6%	2%	9%
	LU	66%	48%	11%	7%	10%
	HU	47%	49%	2%	3%	31%
	MT	64%	78%	10%	1%	6%
	NL	64%	68%	12%	1%	8%
	AT	53%	49%	6%	2%	26%
	PL	48%	53%	10%	2%	25%
	PT	56%	24%	5%	0%	32%
	RO	69%	43%	8%	5%	13%
	SI	62%	55%	8%	1%	14%
	SK	51%	61%	8%	1%	22%
	FI	60%	77%	10%	1%	12%
	SE	53%	66%	16%	2%	19%
	UK	44%	55%	12%	2%	23%
Highest percentage per country		<i>Lowest percentage per country</i>				
		Highest percentage per item		Lowest percentage per item		



BASE: Respondents who have a mobile phone and had travelled within last 12 months prior to the interview in 2006 and 2010

Although the questions asked about the use of roaming services in 2006 and 2010 are not directly comparable, it is possible to make broad observations regarding the evolutions.

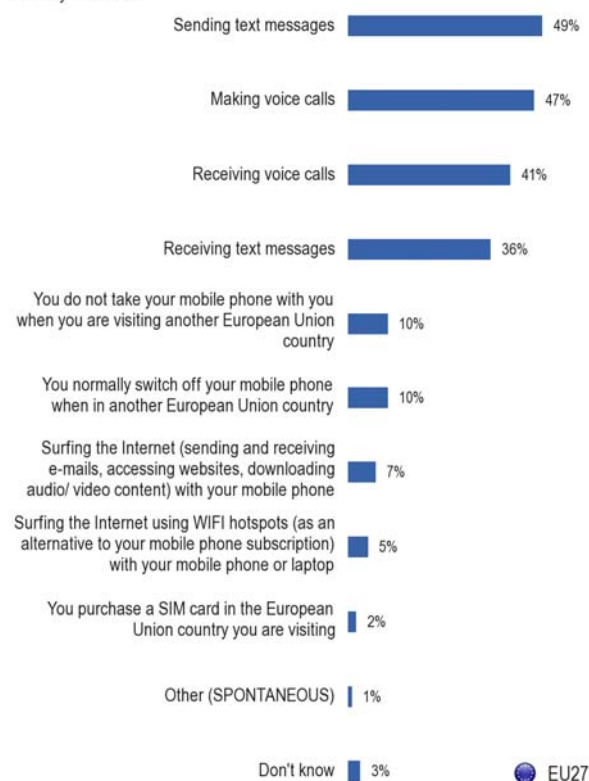
The overall proportion of respondents using roaming services has remained stable during the period: in 2006 79% of respondents reported they had used roaming services while abroad and exactly the same figure is obtained in 2010. It can be therefore said that the economic crisis does not seem to have impacted the overall use of roaming services, i.e. among mobile phone users who have travelled there are no more people who report switching off or leaving their phones home in this present survey than in 2006.

The use of various roaming services also remains stable as the table on the following page shows. **Only Internet-related services seem to have increased their user share since 2006.**

A comparison over time at national level is not conducted here due to the very small bases in some countries. However, it can be further observed that no significant differences emerge when comparing the EU15 and NMS12 countries taken together which further confirms that no significant changes have occurred since 2006.

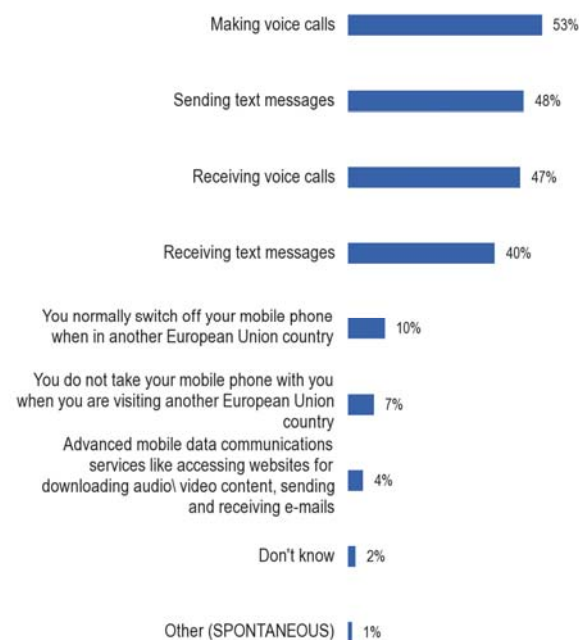
In brief, **the present survey does not show significant evolutions in the total proportion of respondents using roaming services nor in the proportions using different types of services.** However, it should be noted here that these data do not specify *the frequency* with which respondents use roaming services. In other words, it is impossible to say whether respondents who report using voice call services, for example, now call more frequently while abroad than in 2006. This question is further analysed in chapter 3.

QB2T. Mobile phone communication services used the most in another EU country - TOTAL



EU27

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








EB66.1 Sep.-Oct. 2006 / Base : EU25

Finally a **socio-demographic** analysis reveals some interesting patterns:

- Males are more likely than females to use voice calls while females in turn use more text messages. Both are equally likely to switch off/leave mobile phone at home;
- Young people and students are significantly more likely to use text messages than voice calls while a reversed pattern is observed for older people. The youngest age group is also more likely to make use of Internet-related services than their older counterparts;
- Older people and those who have retired are the most likely to leave their mobile phone at home or to switch it off while abroad;

QB2T Mobile phone communication services used the most in another EU country - TOTAL

	Users of voice services	Users of text services	Users of internet services	Purchasing sim card	Does not use mobile phone
EU27	55%	52%	10%	2%	19%
Sex					
 Male	57%	48%	12%	2%	20%
 Female	53%	56%	8%	2%	19%
Age					
 15-24	46%	61%	15%	2%	20%
25-39	58%	59%	10%	3%	15%
40-54	57%	52%	9%	2%	18%
55 +	55%	36%	6%	1%	26%
Education (End of)					
 15-	52%	31%	2%	2%	29%
16-19	53%	49%	7%	2%	22%
20+	61%	55%	12%	1%	15%
Still studying	43%	64%	16%	2%	19%
Respondent occupation scale					
 Self-employed	66%	51%	11%	1%	13%
Managers	61%	56%	14%	2%	14%
Other white collars	59%	63%	7%	2%	12%
Manual workers	51%	50%	7%	3%	24%
House persons	56%	48%	6%	3%	19%
Unemployed	52%	51%	13%	3%	21%
Retired	50%	33%	5%	1%	30%
Students	43%	64%	16%	2%	19%
Difficulties to pay bills					
Most of the time	48%	36%	13%	2%	26%
From time to time	50%	50%	10%	3%	22%
Almost never	57%	53%	10%	2%	18%

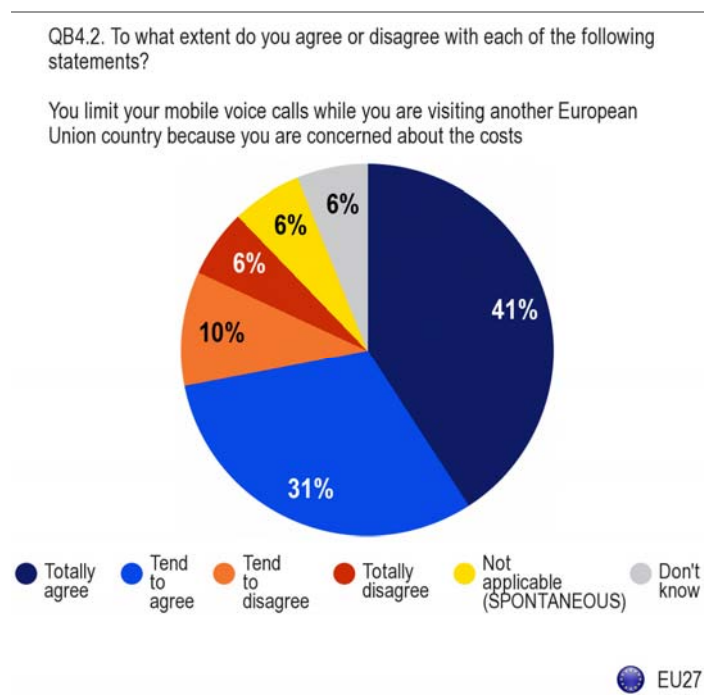
2.2 Attitudes toward current usage

In the previous chapter we have seen to what extent and how Europeans make use of roaming services. The analysis will now continue to look at their behavioural attitudes to their current use: are Europeans likely to change their mobile user behaviour while abroad because of the cost of roaming? More specifically, attitudes towards mobile voice calls and using the Internet with a mobile phone will be examined.

Question: QB4 To what extent do you agree or disagree with each of the following statements?

2. *You limit your mobile voice calls while you are visiting another European Union country because you are concerned about the costs*

BASE: Respondents who have a mobile phone and have travelled within last 4-5 years



As the graph above shows, **Europeans continue to limit their use of voice call services while abroad because they are concerned about the costs**: nearly three-quarters (72% totally agree and tend to agree) change their user behaviour while travelling within Europe. Only 16% disagree with this statement and use their mobile phones more or less in the same manner as at home.

When looking at the results by travel pattern and by the type of services used, the following observations can be made:

- Travel pattern does not seem to make a difference here: frequent travellers are as likely to state that they limit their voice calls while abroad as the other groups;
- Users of text messages and Internet services are significantly more likely than users of voice calls services to say they limit their mobile voice calls while abroad, which may imply that they substitute the use of voice calls by the two other types of services while travelling.

QB4.2 To what extent do you agree or disagree with each of the following statements?

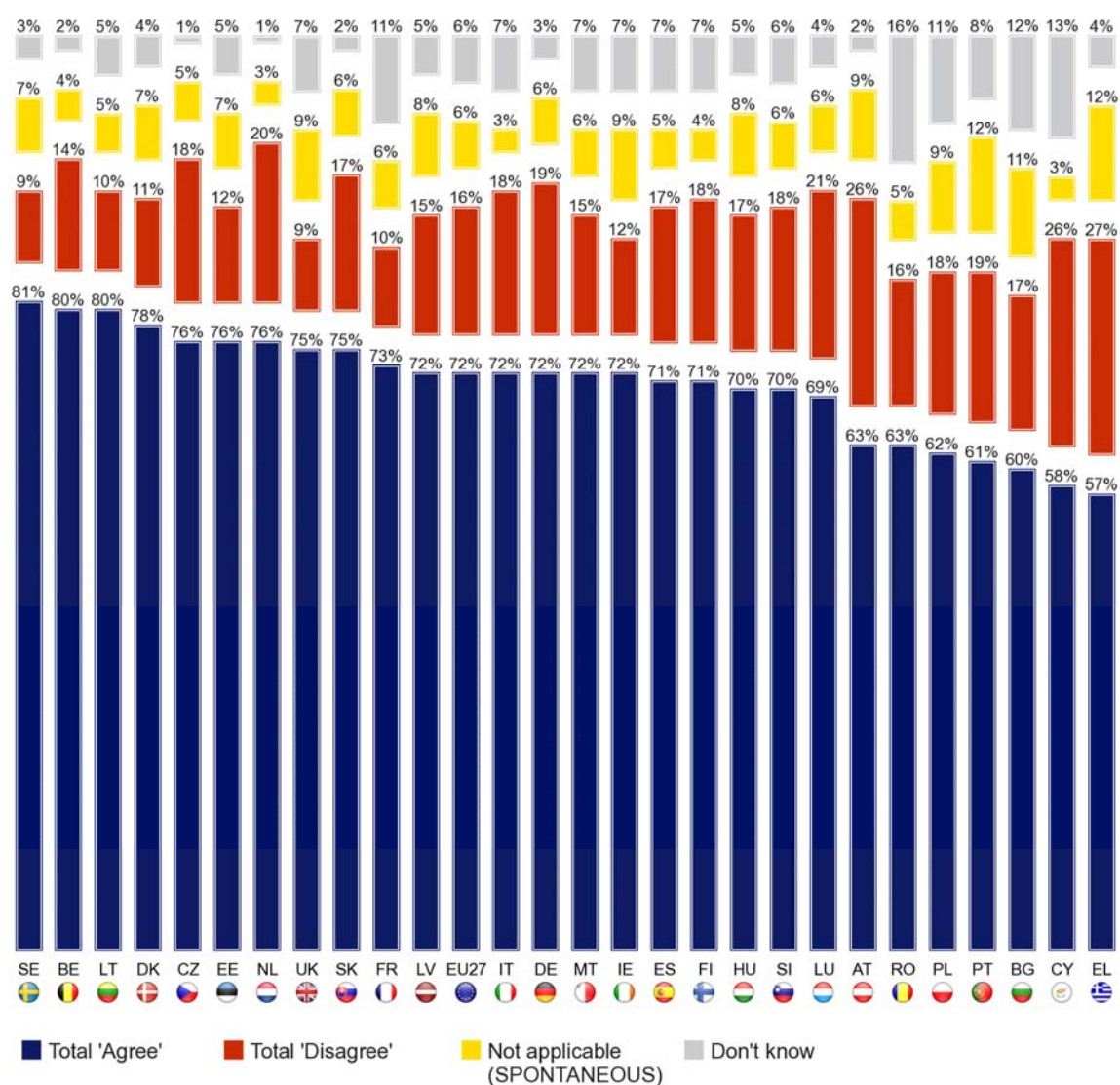
You limit your mobile voice calls while you are visiting another EU country because you are concerned about the costs

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Not applicable (SPONTANEOUS)	DK	Total 'Agree'	Total 'Disagree'
EU27	41%	31%	10%	6%	6%	6%	72%	16%
Travel pattern								
Both time	41%	32%	12%	6%	5%	4%	73%	18%
Only 12 months ago	39%	29%	8%	7%	7%	10%	68%	15%
Only 4/5 years ago	42%	29%	8%	4%	9%	8%	71%	12%
No travelling	-	-	-	-	-	-		
Services Used								
Users of voice calls	36%	36%	14%	8%	2%	4%	72%	22%
Users of text messages	44%	35%	12%	5%	2%	2%	79%	17%
Users of internet services	46%	33%	12%	6%	1%	2%	79%	18%
Purchasing sim card	39%	32%	18%	4%	1%	6%	71%	22%
Does not use mobile phone	45%	16%	3%	3%	21%	12%	61%	6%

In every Member State the absolute majority of respondents say they limit their mobile phone usage for voice calls while abroad due to the cost of roaming. At the highest end, 4 in 5 respondents in Sweden, Belgium and Lithuania change their user behaviour while a quarter of respondents in Greece, Austria and Cyprus disagree with the statement and say that they continue to use voice call services abroad more or less to the same extent as at home.

QB4.2. To what extent do you agree or disagree with each of the following statements?





You limit your mobile voice calls while you are visiting another European Union country because you are concerned about the costs



The socio-demographic analysis does not reveal many significant differences. **Young respondents (and students) are somewhat more likely to limit their use of voice call services abroad than the average European** and their older counterparts. A similar pattern was also observed in the 2006 study: young respondents were significantly more likely to say that they limit their use of roaming services in general than their older counterparts.

QB4.2 To what extent do you agree or disagree with each of the following statements?

You limit your mobile voice calls while you are visiting another EU country because you are concerned about the costs

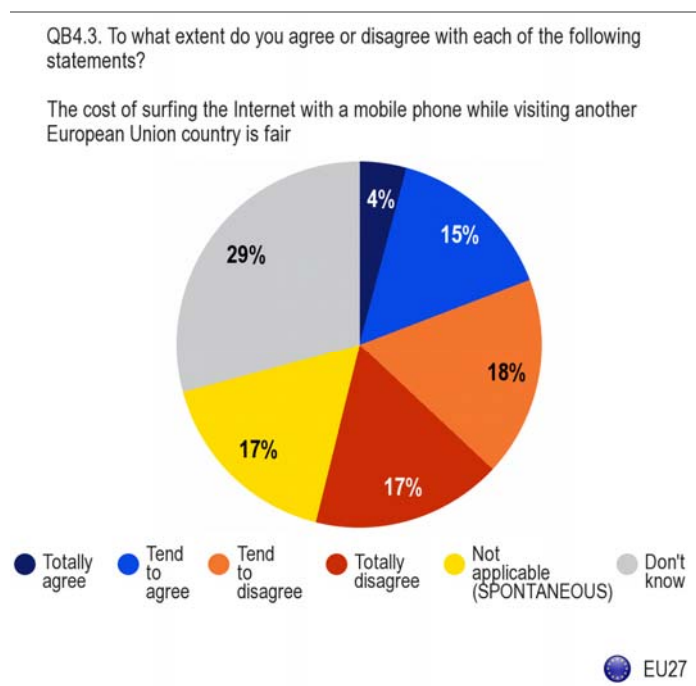
	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Not applicable (SPONTANEOUS)	DK	Total 'Agree'	Total 'Disagree'
EU27	41%	31%	10%	6%	6%	6%	72%	16%
Sex								
 Male	39%	33%	10%	7%	6%	5%	72%	17%
Female	44%	29%	10%	4%	7%	6%	73%	14%
Age								
 15-24	49%	30%	7%	4%	5%	5%	79%	11%
25-39	40%	34%	12%	5%	4%	5%	74%	17%
40-54	41%	32%	11%	6%	5%	5%	73%	17%
55 +	38%	26%	10%	7%	11%	8%	64%	17%
Education (End of)								
 15-	39%	24%	7%	6%	13%	11%	63%	13%
16-19	41%	31%	10%	5%	7%	6%	72%	15%
20+	41%	32%	11%	7%	4%	5%	73%	18%
Still studying	48%	31%	8%	3%	5%	5%	79%	11%
Respondent occupation scale								
 Self-employed	36%	33%	12%	9%	5%	5%	69%	21%
Managers	38%	37%	11%	6%	3%	5%	75%	17%
Other white collars	40%	35%	11%	6%	4%	4%	75%	17%
Manual workers	45%	28%	11%	4%	6%	6%	73%	15%
House persons	42%	27%	11%	5%	8%	7%	69%	16%
Unemployed	48%	25%	9%	4%	6%	8%	73%	13%
Retired	39%	25%	9%	7%	12%	8%	64%	16%
Students	48%	31%	8%	3%	5%	5%	79%	11%
Difficulties to pay bills								
Most of the time	50%	25%	5%	5%	8%	7%	75%	10%
From time to time	44%	33%	8%	3%	6%	6%	77%	11%
Almost never	40%	30%	11%	7%	6%	6%	70%	18%

Question: QB4 To what extent do you agree or disagree with each of the following statements?

3. The cost of surfing the Internet with a mobile phone while visiting another European Union country is fair

BASE: Respondents who have a mobile phone and have travelled within the last 4-5 years

When it comes to assessing the price of using the Internet with a mobile phone while abroad, most Europeans say that this question is not applicable to them (17%) or simply state that they do not know (29%). This is due to the fact that only 10% of European mobile phone users report using Internet services while abroad. However, **most respondents tend to disagree that the cost of Internet use with a mobile phone is fair (35%)** while 19% agree with the statement.



Opinions do not seem to vary much according to respondents' travel pattern. There are also relatively weak differences according to the roaming services used. When *looking only at those who agreed or disagreed* with the statement, respondents who don't use data roaming services at the moment are even more likely than users to think that the cost is unfair (40% against 37% of voice call users and 32% of text message users). This could suggest that perceptions about data roaming prices are discouraging people from using these services. However these results should be taken only as indicative as the bases even at the EU level are low.

QB4.3 To what extent do you agree or disagree with each of the following statements?

The cost of surfing the Internet with a mobile phone while visiting another EU country is fair

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Not applicable (SPONTANEOUS)	DK	Total 'Agree'	Total 'Disagree'
EU27	4%	15%	18%	17%	17%	29%	19%	35%
Travel pattern								
Both time	4%	16%	19%	18%	17%	26%	20%	37%
Only 12 months ago	5%	14%	16%	14%	17%	34%	19%	30%
Only 4/5 years ago	2%	12%	17%	17%	19%	33%	14%	34%
No travelling	-	-	-	-	-	-		
Services Used								
Users of voice calls	4%	17%	20%	16%	16%	27%	21%	36%
Users of text messages	4%	16%	21%	19%	14%	26%	20%	40%
Users of internet services	8%	25%	26%	23%	5%	13%	33%	49%
Purchasing sim card	2%	13%	30%	21%	10%	24%	15%	51%
Does not use mobile phone	2%	10%	11%	18%	23%	36%	12%	29%

Analysis at national level for this statement has not been conducted, as most of the mobile users were not able to give an answer or did not consider this question relevant to them. Therefore the bases of those who gave an evaluation at national level are too small (fewer than 100 respondents in several countries) for a statistically reliable quantitative analysis.

3 CHANGES IN LAST FOUR YEARS

After describing who uses roaming services in Europe, which services they currently use and to what extent they limit their use at present, it is time to consider to what extent the behaviour of European mobile phone users has changed and how public perceptions have evolved over the last 4 years, during which the Roaming Regulation has been implemented.

3.1 Changes in usage in last four years

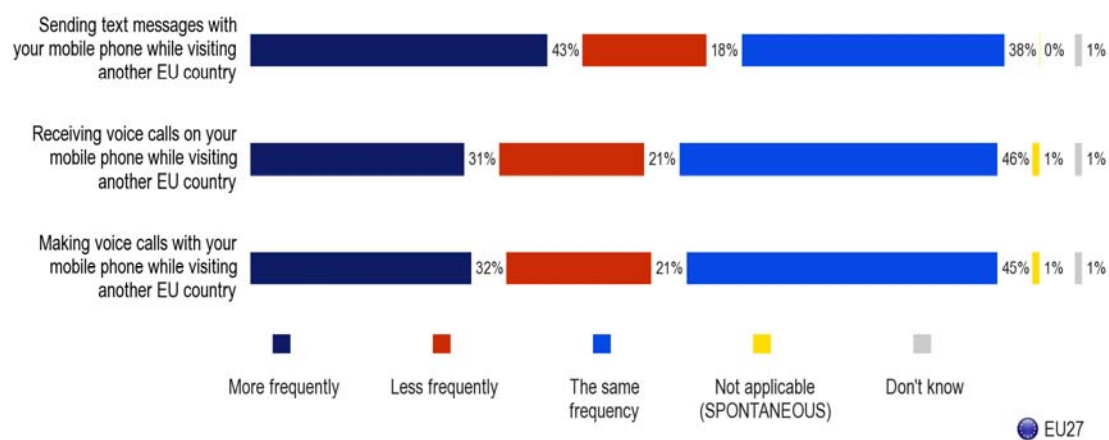
Question: QB3 Compared to the situation 4 years ago, would you say that you use the following mobile phone services more frequently, less frequently or with the same frequency while you are visiting another European Union country?

- 1. Making voice calls with your mobile phone while visiting another European Union country*
- 2. Receiving voice calls on your mobile phone while visiting another European Union country*
- 3. Sending text messages (SMS - USE APPROPRIATE NAMING IN EACH COUNTRY) with your mobile phone while visiting another European Union country*

BASE: Respondents who have a mobile phone, have travelled both within the last 12 months and 4-5 years ago and use the service in question

We will first look at how respondents describe their user behaviour now compared to 4 years ago when the Roaming Regulation did not exist. The analysis is based on the answers of respondents who have travelled both 4-5 years ago and within the past 12 months and report using the service in question, as these are the roaming users who have experience both pre- and post-Regulation and are thus able to evaluate the change in their behaviour.

QB3. Compared to the situation 4 years ago, would you say that you use the following mobile phone services more frequently, less frequently or with the same frequency while you are visiting another European Union country?



While many mobile users claim they have not changed their roaming habits, **significant positive changes can be observed in the use of all services: making and receiving voice calls and sending text messages**. Above all, users of SMS services are more likely to send text messages while travelling in another European country (43%). Over 30% of those who make or receive voice calls also say they make more use of voice call roaming services now than 4 years ago.

However, the change has not been only positive: **around 1 in 5 mobile users have cut down their use of these services**. It is impossible to say to what extent this is due to the financial strain on consumers caused by the economic crisis.






A socio-demographic analysis shows that **young people in particular say that they are more likely to use the respective roaming services now than 4 years ago**: sending text messages, 51% and making and receiving voice calls, both 42%.

At the same time, older respondents are significantly less likely to say that they use the respective services more frequently than 4 years ago. However this is not because they use these services less but rather due to unchanged consumer behaviour since 2006.

There are no differences by the gender of respondent.






QB3.1 Compared to the situation 4 years ago, would you say that you use the following mobile phone services more frequently, less frequently or with the same frequency while you are visiting another EU country?

Making voice calls with your mobile phone while visiting another EU country

	More frequently	Less often	The same frequency	Not applicable (SPONTANEOUS)	DK
EU27	32%	21%	45%	1%	1%
Sex					
 Male	32%	20%	46%	1%	1%
 Female	32%	22%	44%	-	2%
Age					
 15-24	43%	24%	31%	1%	1%
25-39	33%	20%	45%	1%	1%
40-54	33%	21%	45%	1%	-
55 +	26%	21%	51%	1%	1%
Education (End of)					
 15-	18%	30%	48%	3%	1%
16-19	31%	21%	47%	-	1%
20+	33%	19%	46%	1%	1%
Still studying	42%	24%	32%	1%	1%
Respondent occupation scale					
 Self-employed	34%	24%	40%	-	2%
Managers	37%	17%	45%	-	1%
Other white collars	37%	19%	44%	-	-
Manual workers	26%	25%	48%	1%	-
House persons	24%	23%	51%	-	2%
Unemployed	31%	19%	45%	3%	2%
Retired	23%	22%	52%	2%	1%
Students	42%	24%	32%	1%	1%
Difficulties to pay bills					
Most of the time	34%	24%	41%	-	1%
From time to time	27%	26%	45%	1%	1%
Almost never	33%	20%	45%	1%	1%






QB3.2 Compared to the situation 4 years ago, would you say that you use the following mobile phone services more frequently, less frequently or with the same frequency while you are visiting another EU country?

Receiving voice calls on your mobile phone while visiting another EU country

	More frequently	Less often	The same frequency	Not applicable (SPONTANEOUS)	DK
EU27	31%	21%	46%	1%	1%
Sex					
 Male	31%	22%	45%	1%	1%
 Female	31%	20%	46%	1%	2%
Age					
 15-24	42%	21%	33%	2%	2%
25-39	32%	23%	43%	-	2%
40-54	30%	19%	49%	1%	1%
55 +	24%	21%	52%	1%	2%
Education (End of)					
 15-	14%	30%	55%	1%	-
16-19	29%	22%	47%	1%	1%
20+	32%	19%	47%	1%	1%
Still studying	41%	20%	35%	1%	3%
Respondent occupation scale					
 Self-employed	38%	17%	43%	-	2%
Managers	33%	20%	46%	-	1%
Other white collars	32%	19%	48%	1%	-
Manual workers	24%	27%	46%	1%	2%
House persons	25%	23%	46%	2%	4%
Unemployed	33%	21%	41%	3%	2%
Retired	20%	22%	54%	3%	1%
Students	41%	20%	35%	1%	3%
Difficulties to pay bills					
Most of the time	27%	28%	44%	-	1%
From time to time	26%	29%	43%	1%	1%
Almost never	32%	19%	46%	1%	2%

QB3.3 Compared to the situation 4 years ago, would you say that you use the following mobile phone services more frequently, less frequently or with the same frequency while you are visiting another EU country?

Sending text messages with your mobile phone while visiting another EU country

	More frequently	Less often	The same frequency	Not applicable (SPONTANEOUS)	DK
EU27	43%	18%	38%	-	1%
Sex					
 Male	43%	18%	38%	-	1%
 Female	43%	17%	38%	1%	1%
Age					
 15-24	51%	19%	28%	1%	1%
25-39	41%	17%	40%	-	2%
40-54	43%	18%	38%	-	1%
55 +	38%	16%	44%	1%	1%
Education (End of)					
 15-	26%	27%	44%	1%	2%
16-19	42%	18%	38%	-	2%
20+	42%	16%	41%	-	1%
Still studying	51%	18%	30%	1%	-
Respondent occupation scale					
 Self-employed	40%	18%	39%	-	3%
Managers	44%	17%	38%	-	1%
Other white collars	43%	18%	38%	-	1%
Manual workers	41%	18%	40%	-	1%
House persons	36%	16%	46%	-	2%
Unemployed	40%	22%	32%	3%	3%
Retired	37%	18%	44%	1%	-
Students	51%	18%	30%	1%	-
Difficulties to pay bills					
Most of the time	40%	33%	23%	-	4%
From time to time	39%	23%	36%	1%	1%
Almost never	44%	16%	39%	-	1%

It is not possible to continue this analysis at the national level as the proportions of respondents who have travelled in both periods and have used the roaming service in question become too small for a reliable quantitative analysis.

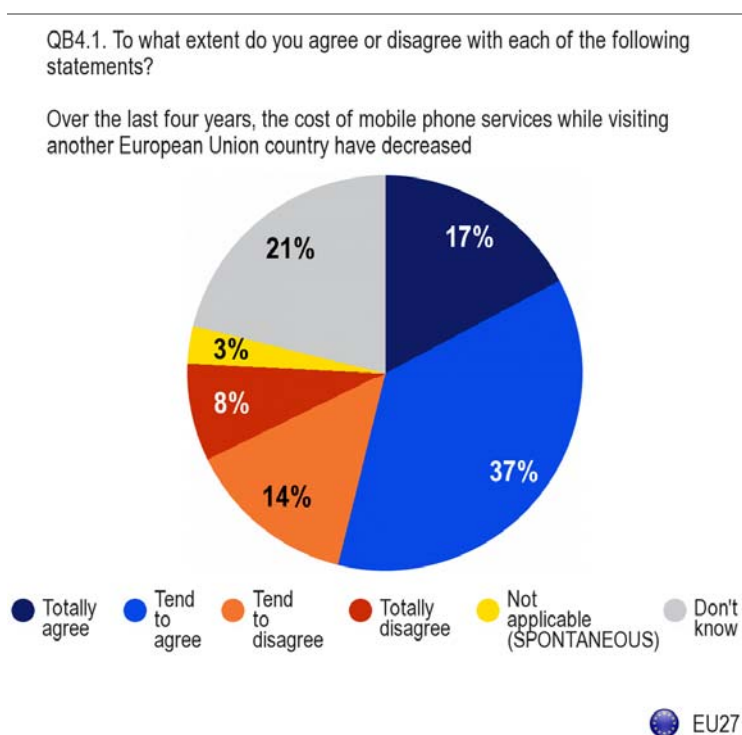
3.2 Opinions on the changes in roaming charges

Question: QB4 To what extent do you agree or disagree with each of the following statements?

1. Over the last four years, the cost of mobile phone services while visiting another European Union country have decreased

BASE: Respondents who have a mobile phone and have travelled at least once 4-5 years ago

Finally, we will conclude with the analysis of what European mobile users think about the general price development of roaming services over the last four years. This question was asked to all mobile users who had visited another EU country at least once in the last 4-5 years.



The absolute majority (54%) of European mobile users agree that the cost of roaming services has decreased over the last four years. However, over 1 in 5 respondents still claim that this is not the case. It also seems that a number of respondents have no idea about recent developments as the 'don't know' response to this question stands at 21%.

Mobile phone users who travel frequently are significantly more likely to agree that roaming prices have fallen in the last 4 years than the average mobile user (61% against 54%). This result demonstrates that for the group having first hand experience of roaming services during this period, the changes in prices have been widely noticed and acknowledged. However, information about the decrease in roaming charges has not entirely reached those mobile phone users who have not travelled frequently during the last four years.

QB4.1 To what extent do you agree or disagree with each of the following statements?

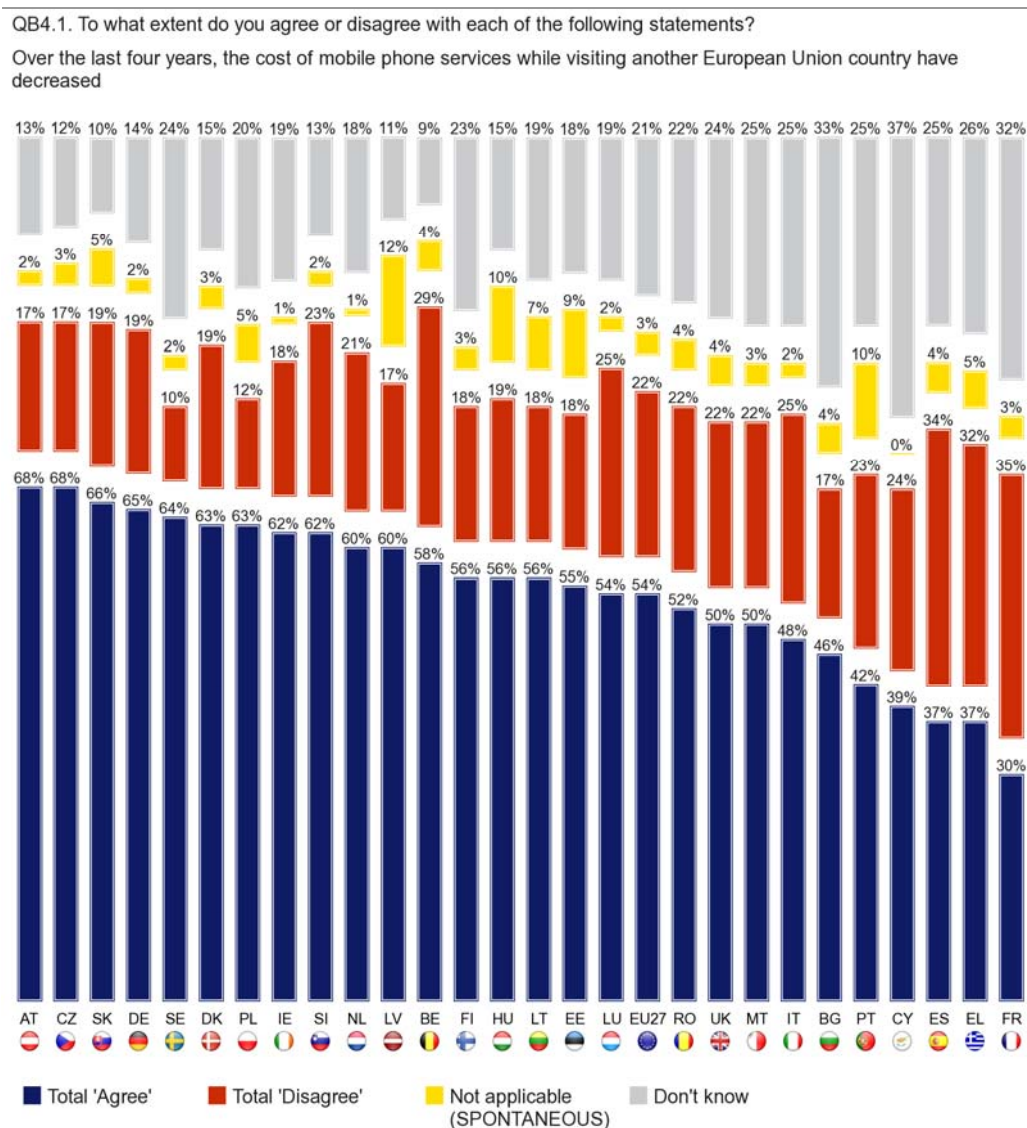
Over the last four years, the cost of mobile phone services while visiting another EU country have decreased

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Not applicable (SPONTANEOUS)	DK	Total 'Agree'	Total 'Disagree'
EU27	17%	37%	14%	8%	3%	21%	54%	22%
Travel pattern								
Both time	21%	40%	14%	8%	2%	15%	61%	22%
Only 12 months ago	12%	31%	14%	9%	5%	29%	43%	23%
Only 4/5 years ago	12%	33%	15%	8%	4%	28%	45%	23%
No travelling	-	-	-	-	-	-		
Services Used								
Users of voice calls	21%	40%	14%	8%	2%	15%	61%	22%
Users of text messages	21%	41%	15%	8%	1%	14%	62%	23%
Users of internet services	24%	39%	18%	10%	-	9%	63%	28%
Purchasing sim card	17%	42%	16%	11%	1%	13%	59%	27%
Does not use mobile phone	9%	28%	13%	7%	7%	36%	37%	20%

It is also evident that **users of roaming services appear more aware of the positive price evolutions than those who do not use their mobile phones while travelling abroad**: 61% of users of voice services, 62% of SMS services and 63% of Internet services agree that prices have decreased in the last 4 years.

Only 37% of those who leave their mobile phone home or switch it off while travelling in the EU think that the roaming cost is now lower than 4 years ago. A further 36% in this group are unable to evaluate the price evolution of roaming services. This implies that perhaps this group avoids using their mobile phone while travelling abroad because they do not have sufficient information about current roaming charges.

In most Member States a substantial majority agree that roaming prices have decreased in the last 4 years. Over 60% of mobile phone users in Austria, the Czech Republic, Slovakia, Germany, Sweden, Poland, Ireland and Slovenia are of this opinion. Slovakia, Germany, Sweden, Poland, Denmark, Ireland and Slovenia are of this opinion.








France is the only country in which respondents who do not believe rates have fallen outnumber those who think roaming costs have decreased. Relatively high levels of those who disagree that prices have fallen are also registered in Spain and Greece.

Finally, around a third of mobile users in Cyprus, France and Bulgaria could not answer the question about the recent price developments.

The **socio-demographic** analysis reveals the following:

- Men are more likely than women to agree that the prices have decreased. Men are also more likely to travel frequently and are perhaps therefore more aware of price developments through first hand experience;
- The oldest age group, respondents with a low level of education and those who have retired are significantly less likely to think that prices have decreased. However, this is not because they tend to disagree with the statement but because they are not able to evaluate the price development. This suggests that there is a particular lack of information about roaming prices among older mobile users.
- Active respondents (employed/self-employed) seem more aware of the decreased roaming cost than the non-active group (unemployed, house persons).

QB4.1 To what extent do you agree or disagree with each of the following statements?				
Over the last four years, the cost of mobile phone services while visiting another EU country have decreased				
	Total 'Agree'	Total 'Disagree'	Not applicable (SPONTANEOUS)	DK
EU27	54%	22%	3%	21%
Sex				
 Male	58%	21%	3%	18%
 Female	50%	23%	4%	23%
Age				
 15-24	53%	26%	3%	18%
25-39	57%	23%	3%	17%
40-54	58%	22%	3%	17%
55 +	47%	19%	4%	30%
Education (End of)				
 15-	37%	25%	4%	34%
16-19	54%	21%	4%	21%
20+	58%	22%	2%	18%
Still studying	53%	27%	3%	17%
Respondent occupation scale				
 Self-employed	57%	23%	3%	17%
Managers	64%	19%	2%	15%
Other white collars	60%	20%	3%	17%
Manual workers	52%	25%	3%	20%
House persons	46%	28%	2%	24%
Unemployed	49%	24%	4%	23%
Retired	45%	19%	4%	32%
Students	53%	27%	3%	17%
Difficulties to pay bills				
Most of the time	46%	24%	7%	23%
From time to time	52%	25%	3%	20%
Almost never	56%	21%	3%	20%

CONCLUSIONS

The interim report⁷ by the Commission regarding the functioning of the Roaming Regulation stated the following:

- Consumers are making more use of roaming services. Despite an estimated 12% decline in travel, overall volumes of calls received and SMS sent while abroad in the EU have grown over the past two years;
- Data roaming services grew by more than 40% in volume in 2009;
- In particular, 20% more text messages were sent in the summer of 2009 than in the previous summer, following the introduction of the EU-wide 11 cents SMS price cap;
- Consumers have continued to make use of roaming services which implies consumer confidence and points to the benefits of Roaming regulation;
- Roaming charges are still higher than domestic mobile service charges.

The results of this survey strongly support all these findings from a consumer point of view.

Although European mobile phone users report that they have travelled less in 2010 than in 2006, the segment that visits other EU countries is increasingly using roaming services. While there are no significant changes in **the overall proportions** of respondents who use roaming services, **frequent travellers tend to be more likely to use their mobile phones while abroad now than before 2006**. Furthermore, no considerable changes are observed in the proportions of respondents using different types of services, with the exception of Internet-related services, which are significantly more used now than in 2006. This reflects the recent development of these data services in the mobile phone market.

Considerable numbers report that they use voice call and text message services **more frequently** now than four years ago. In other words, according to the European public, **the volume of use has increased**. In particular, respondents say that they send **more text messages** now than four years ago.

⁷ Interim report on the state of development of roaming services within the European Union
http://ec.europa.eu/information_society/activities/roaming/docs/interim_report2010.pdf

This tends to show that the effect of the price decreases brought by the Roaming Regulation has limited the impact of the economic crisis on consumer behaviour– in fact, **those mobile phone users who travel continue to use roaming service to an even greater extent than before.**

However, the fact that roaming charges are still higher than domestic mobile services does not go unnoticed among Europeans: **72% say they limit the use of voice calls while abroad because they are concerned about the costs, even if a large majority of users agree that roaming charges are lower than 4 years ago.**

Even though information about positive price developments appears to have reached the main users of roaming services, the results suggest that more could be done towards other groups of mobile phone users, such as older or retired people.

It is indeed the case that those groups which are most likely to switch off, namely older people and the retired, are also the groups that are the least aware of the positive changes in the cost of roaming. It is possible that more information on current roaming charges targeted at this group would lead to a higher proportion of Europeans using roaming services.

ANNEXES

TECHNICAL SPECIFICATIONS

SPECIAL EUROBAROMETER N° 356

Roaming

TECHNICAL SPECIFICATIONS

Between the 26th of August and the 16th of September 2010, TNS Opinion & Social, a consortium created between TNS plc and TNS opinion, carried out the wave 74.1 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Research and Speechwriting".

The SPECIAL EUROBAROMETER N°356 is part of wave 74.1 and 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	1.013	26/08/2010	16/09/2010	8.866.411
BG	Bulgaria	TNS BBSS	1.000	27/08/2010	07/09/2010	6.584.957
CZ	Czech Rep.	TNS Aisa	1.001	27/08/2010	12/09/2010	8.987.535
DK	Denmark	TNS Gallup DK	1.012	27/08/2010	13/09/2010	4.533.420
DE	Germany	TNS Infratest	1.577	27/08/2010	12/09/2010	64.545.601
EE	Estonia	Emor	1.000	27/08/2010	12/09/2010	916.000
IE	Ireland	MRBI	1.011	27/08/2010	10/09/2010	3.375.399
EL	Greece	TNS ICAP	1.000	27/08/2010	10/09/2010	8.693.566
ES	Spain	TNS Demoscopia	1.005	27/08/2010	12/09/2010	39.035.867
FR	France	TNS Sofres	1.043	27/08/2010	12/09/2010	47.620.942
IT	Italy	TNS Infratest	1.029	27/08/2010	12/09/2010	51.252.247
CY	Rep. of Cyprus	Synovate	504	27/08/2010	12/09/2010	651.400
LV	Latvia	TNS Latvia	1.009	27/08/2010	13/09/2010	1.448.719
LT	Lithuania	TNS Gallup Lithuania	1.017	27/08/2010	08/09/2010	2.849.359
LU	Luxembourg	TNS ILReS	476	27/08/2010	22/09/2010	404.907
HU	Hungary	TNS Hungary	1.022	27/08/2010	12/09/2010	8.320.614
MT	Malta	MISCO	500	26/08/2010	13/09/2010	335.476
NL	Netherlands	TNS NIPO	1.011	27/08/2010	14/09/2010	13.288.200
AT	Austria	Österreichisches Gallup-Institut	1.013	26/08/2010	12/09/2010	6.973.277
PL	Poland	TNS OBOP	1.000	28/08/2010	13/09/2010	32.306.436
PT	Portugal	TNS EUROTESTE	1.011	28/08/2010	12/09/2010	8.080.915
RO	Romania	TNS CSOP	1.034	27/08/2010	09/09/2010	18.246.731
SI	Slovenia	RM PLUS	1.008	27/08/2010	12/09/2010	1.748.308
SK	Slovakia	TNS AISA SK	1.016	28/08/2010	12/09/2010	4.549.954
FI	Finland	TNS Gallup Oy	1.002	27/08/2010	14/09/2010	4.412.321
SE	Sweden	TNS GALLUP	1.012	27/08/2010	13/09/2010	7.723.931
UK	United Kingdom	TNS UK	1.309	27/08/2010	13/09/2010	51.081.866
TOTAL EU27			26.635	26/08/2010	16/09/2010	406.834.359

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

QUESTIONNAIRE

Now let's talk about another topic.

D43a Do you own a fixed telephone in your household?

D43b Do you own a personal mobile telephone?

	(483)	(484)
	D43a	D43b
	Fixed	Mobile
Yes	1	1
No	2	2

EB73.5 D43a D43b

ASK QB1 TO QB4 IF "HAS A PERSONAL MOBILE PHONE", CODE 1 IN D43b - OTHERS GO TO QC1

QB1 Have you visited another European Union country for private purposes...?

(ONE ANSWER PER LINE)

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

(485)	1	Within the past 12 months	1	2	3
(486)	2	Between 4 and 5 years ago	1	2	3

NEW (BASED ON EB66.1 QB3)

Passons maintenant à un autre sujet.

D43a Possédez-vous un téléphone fixe dans votre foyer ?

D43b Possédez-vous un téléphone mobile\ GSM\ portable personnel ?

	(483)	(484)
	D43a	D43b
	Fixe	Mobile
Oui	1	1
Non	2	2

EB73.5 D43a D43b

POSER QB1 A QB4 SI "POSSEDE UN TELEPHONE MOBILE/ GSM/ PORTABLE PERSONNEL", CODE 1 EN D43b - LES AUTRES ALLER A QC1

QB1 Avez-vous séjourné dans un autre pays de l'Union européenne pour raisons personnelles ... ?

(UNE REPONSE PAR LIGNE)

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

(485)	1	Au cours des 12 derniers mois	1	2	3
(486)	2	Il y a 4 à 5 ans	1	2	3

NEW (BASED ON EB66.1 QB3)

ASK QB2a TO QB4 IF "HAS VISITED ANOTHER EUROPEAN UNION COUNTRY", CODE 1 OR 2 IN QB1.1 OR QB1.2

--

QB2a Which of the following mobile phone communication services do you use most when visiting another European Union country?

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

	(487-488)
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
Surfing the Internet (sending and receiving e-mails, accessing websites, downloading audio\ video content) with your mobile phone	5
Surfing the Internet using WIFI hotspots (as an alternative to your mobile phone subscription) with your mobile phone or laptop	6
You purchase a SIM card in the European Union country you are visiting	7
You normally switch off your mobile phone when in another European Union country	8
You do not take your mobile phone with you when you are visiting another European Union country	9
Other (SPONTANEOUS)	10
DK	11

NEW (BASED ON EB66.1 QB4)

POSER QB2a A QB4 SI "A SEJOURNE DANS UN AUTRE PAYS DE L'UE", CODE 1 OU 2 EN QB1.1 OU QB1.2

--

QB2a Parmi les services de communication mobile suivants, lequel utilisez-vous le plus lors de séjours dans un autre pays de l'Union européenne ?

(MONTRER CARTE – LIRE – UNE SEULE REPONSE)

	(487-488)
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
Surfer sur Internet (pour envoyer et recevoir des courriers électroniques, accéder à des sites web, télécharger du contenu audio\ vidéo) avec votre téléphone mobile	5
Surfer sur Internet en utilisant des bornes WIFI (comme alternative à votre abonnement de téléphone mobile) avec votre téléphone mobile ou votre ordinateur portable	6
Vous achetez une carte SIM dans le pays de l'Union européenne où vous séjournez	7
Normalement, vous éteignez votre téléphone mobile lors de séjours dans un autre pays de l'Union européenne	8
Vous n'emportez pas votre téléphone mobile avec vous lors de séjours dans un autre pays de l'Union européenne	9
Autre (SPONTANE)	10
NSP	11

NEW (BASED ON EB66.1 QB4)

ASK QB2b ONLY IF "USES MOBILE PHONE COMMUNICATION SERVICES IN ANOTHER EU COUNTRY" CODES 1 TO 6 IN QB2a - OTHERS GO TO QB4

--

QB2b	And which other services do you usually use when visiting another European Union country?
------	---

(SHOW CARD – READ OUT ANY OF CODES 1-6 NOT CODED AT QB2a – MULTIPLE ANSWERS POSSIBLE)

	(489-496)
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,
Surfing the Internet (sending and receiving e-mails, accessing websites, downloading audio\ video content) with your mobile phone	5,
Surfing the Internet using WIFI hotspots (as an alternative to your mobile phone subscription) with your mobile phone or laptop	6,
None	7,
DK	8,

NEW (BASED ON EB66.1 QB4)

POSER QB2b SEULEMENT SI "UTILISE LES SERVICES DE COMMUNICATION MOBILE DANS UN AUTRE PAYS DE L'UE", CODES 1 A 6 EN QB2a - LES AUTRES ALLER EN QB4

--

QB2b	Et quels autres services utilisez-vous habituellement lors de séjours dans un autre pays de l'Union européenne ?
------	--

(MONTRER CARTE – LIRE ITEMS 1 A 6 PAS CODES EN QB2a – PLUSIEURS REPONSES POSSIBLES)

	(489-496)
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,
Surfer sur Internet (pour envoyer et recevoir des courriers électroniques, accéder à des sites web, télécharger du contenu audio\ vidéo) avec votre téléphone mobile	5,
Surfer sur Internet en utilisant des bornes WIFI (comme alternative à votre abonnement de téléphone mobile) avec votre téléphone mobile ou votre ordinateur portable	6,
Aucun	7,
NSP	8,

NEW (BASED ON EB66.1 QB4)

ASK QB3 IF "USES MAIN MOBILE PHONE COMMUNICATION SERVICES IN ANOTHER EU COUNTRY" - CODES 1 TO 3 IN QB2a OR QB2b - OTHERS GO TO QB4

QB3 Compared to the situation 4 years ago, would you say that you use the following mobile phone services more frequently, less frequently or with the same frequency while you are visiting another European Union country?

(SHOW CARD – ONE ANSWER PER LINE)

	(READ OUT)	More frequently	Less frequently	The same frequency	Not applicable (SPONTANEOUS)	DK
--	------------	-----------------	-----------------	--------------------	------------------------------	----

(497)

1	(ONLY IF CODE 1 IN QB2a OR QB2b) Making voice calls with your mobile phone while visiting another European Union country	1	2	3	4	5
---	--	---	---	---	---	---

(498)

2	(ONLY IF CODE 2 IN QB2a OR QB2b) Receiving voice calls on your mobile phone while visiting another European Union country	1	2	3	4	5
---	---	---	---	---	---	---

(499)

3	(ONLY IF CODE 3 IN QB2a OR QB2b) Sending text messages (SMS - USE APPROPRIATE NAMING IN EACH COUNTRY) with your mobile phone while visiting another European Union country	1	2	3	4	5
---	--	---	---	---	---	---

NEW

POSER QB3 SI "UTILISE LES SERVICES PRINCIPAUX DE COMMUNICATION MOBILE DANS UN AUTRE PAYS DE L'UE", CODES 1 A 3 EN QB2a OU QB2b - LES AUTRES ALLER EN QB4

QB3 Comparé à la situation d'il y a 4 ans, diriez-vous que vous utilisez plus souvent, moins souvent ou aussi souvent les services de téléphonie mobile pendant vos séjours dans un autre pays de l'Union européenne ?

(MONTRER CARTE – UNE REPONSE PAR LIGNE)

	(LIRE)	Plus souvent	Moins souvent	Aussi souvent	Pas applicable (SPONTANEE)	NSP
--	--------	--------------	---------------	---------------	----------------------------	-----

(497)

1	(SEULEMENT SI CODE 1 EN QB2a OR QB2b) Emettre des appels depuis votre téléphone mobile lors de séjours dans un autre pays de l'Union européenne	1	2	3	4	5
---	---	---	---	---	---	---

(498)

2	(SEULEMENT SI CODE 2 EN QB2a OR QB2b) Recevoir des appels sur votre téléphone mobile lors de séjours dans un autre pays de l'Union européenne	1	2	3	4	5
---	---	---	---	---	---	---

(499)

3	(SEULEMENT SI CODE 3 EN QB2a OR QB2b) Envoyer des messages textes (SMS - ADAPTER LE NOM POUR CHAQUE PAYS) depuis votre téléphone mobile lors de séjours dans un autre pays de l'Union européenne	1	2	3	4	5
---	--	---	---	---	---	---

NEW

ASK QB4 IF "HAS VISITED ANOTHER EUROPEAN UNION COUNTRY", CODE 1 OR 2 IN QB1.1 OR QB1.2

--

QB4 To what extent do you agree or disagree with each of the following statements?

(SHOW CARD – ONE ANSWER PER LINE)

	(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
--	------------	--------------------------	-------------------------	----------------------------	-----------------------------	--	----

(500)

1	Over the last four years, the cost of mobile phone services while visiting another European Union country have decreased	1	2	3	4	5	6
---	--	---	---	---	---	---	---

(501)

2	You limit your mobile voice calls while you are visiting another European Union country because you are concerned about the costs	1	2	3	4	5	6
---	---	---	---	---	---	---	---

(502)

3	The cost of surfing the Internet with a mobile phone while visiting another European Union country is fair	1	2	3	4	5	6
---	--	---	---	---	---	---	---

NEW

POSER QB4 SI "A SEJOURNE DANS UN AUTRE PAYS DE L'UE", CODE 1 OU 2 EN QB1.1 OU QB1.2

--

QB4 Dans quelle mesure êtes-vous d'accord ou pas d'accord avec chacune des propositions suivantes ?

(MONTRER CARTE – UNE REPONSE PAR LIGNE)

	(LIRE)	Tout à fait d'ac cord	Plutôt d'ac cord	Plutôt pas d'ac cord	Pas du tout d'ac cord	Pas appli cabl e (SP ONT ANE)	NSP
--	--------	--------------------------------	------------------------	-------------------------------	-----------------------------------	---	-----

(500)

1	Au cours des 4 dernières années, le coût des services de téléphonie mobile lors de séjours dans un autre pays de l'Union européenne ont baissé	1	2	3	4	5	6
---	--	---	---	---	---	---	---

(501)

2	Vous limitez vos appels depuis votre téléphone mobile pendant vos séjours dans un autre pays de l'Union européenne car vous êtes préoccupé(e) par les coûts	1	2	3	4	5	6
---	---	---	---	---	---	---	---

(502)

3	Le coût pour surfer sur Internet avec un téléphone mobile lors de séjours dans un autre pays de l'Union européenne est correct	1	2	3	4	5	6
---	--	---	---	---	---	---	---

NEW

DEMOGRAPHICS

NO QUESTIONS D1 TO D6

D1 In political matters people talk of "the left" and "the right". How would you place your views on this scale?

(SHOW CARD) - (INT.: DO NOT PROMPT - IF CONTACT HESITATES, TRY AGAIN)

(677-678)

1	2	3	4	5	6	7	8	9	10
Left									Right
1	2	3	4	5	6	7	8	9	10

Refusal (SPONTANEOUS) 11

DK 12

EB73.4 D1

DEMOGRAPHIQUES

PAS DE QUESTIONS D1 A D6

D1 A propos de politique, les gens parlent de "droite" et de "gauche". Vous-même, voudriez-vous situer votre position sur cette échelle ?

(MONTRER CARTE) - (ENQ. : NE RIEN SUGGERER. SI LA PERSONNE HESITE, INSISTER)

(677-678)

1	2	3	4	5	6	7	8	9	10
Gau che									Droit e
1	2	3	4	5	6	7	8	9	10

Refus (SPONTANE) 11

NSP 12

EB73.4 D1

--

D7	Could you give me the letter which corresponds best to your own current situation?
----	--

(SHOW CARD - READ OUT - ONE ANSWER ONLY)
--

(679-680)	
MARRIED OR REMARRIED	
Living without children	1
Living with the children of this marriage	2
Living with the children of a previous marriage	3
Living with the children of this marriage and of a previous marriage	4
SINGLE LIVING WITH A PARTNER	
Living without children	5
Living with the children of this union	6
Living with the children of a previous union	7
Living with the children of this union and of a previous union	8
SINGLE	
Living without children	9
Living with children	10
DIVORCED OR SEPARATED	
Living without children	11
Living with children	12
WIDOW	
Living without children	13
Living with children	14
Other (SPONTANEOUS)	15
Refusal (SPONTANEOUS)	16

EB73.5 D7

D8	How old were you when you stopped full-time education?
----	--

(INT.: IF "STILL STUDYING", CODE '00' - IF "NO EDUCATION" CODE '01' - IF "REFUSAL" CODE '98' - IF "DK" CODE '99')

(681-682)

--	--

EB73.5 D8

--

D7	Pouvez-vous m'indiquer la lettre qui correspond le mieux à votre situation actuelle ?
----	---

(MONTRER CARTE - LIRE - UNE SEULE REPONSE)
--

(679-680)	
MARIÉ(E) OU REMARIÉ(E)	
Vivant sans enfant	1
Vivant avec les enfants de ce mariage	2
Vivant avec les enfants que l'un ou l'autre des conjoints a eu d'une union précédente	3
Vivant avec les enfants de ce mariage et ceux que l'un ou l'autre des conjoints a eu d'une union précédente	4
CELIBATAIRE VIVANT EN COUPLE	
Vivant sans enfant	5
Vivant avec les enfants de cette union	6
Vivant avec les enfants que l'un ou l'autre des partenaires a eu d'une union précédente	7
Vivant avec les enfants de cette union et ceux que l'un ou l'autre des partenaires a eu d'une union précédente	8
CELIBATAIRE	
Vivant sans enfant	9
Vivant avec des enfants	10
DIVORCÉ(E) OU SÉPARÉ(E)	
Vivant sans enfant	11
Vivant avec des enfants	12
VEUF/VEUVE	
Vivant sans enfants	13
Vivant avec des enfants	14
Autre (SPONTANE)	15
Refus (SPONTANE)	16

EB73.5 D7

D8	A quel âge avez-vous arrêté vos études à temps complet ?
----	--

(ENQ. : SI "ETUDIE ENCORE", CODER '00' - SI "PAS D'ETUDE" CODER '01' - SI "REFUS" CODER '98' - SI "DK" CODER '99')
--

(681-682)

--	--

EB73.5 D8

NO QUESTION D9

D10 Gender.

	(683)
Male	1
Female	2

EB73.5 D10

D11 How old are you?

(684-685)

EB73.5 D11

NO QUESTION D12 TO D14

NO QUESTIONS D16 TO D24

D25 Would you say you live in a...?

(READ OUT)

	(686)
Rural area or village	1
Small or middle sized town	2
Large town	3
DK	4

EB73.5 D25

NO QUESTIONS D26 TO D39

D40a Could you tell me how many people aged 15 years or more live in your household, yourself included?

(INT.: READ OUT - WRITE DOWN)

(687-688)

EB73.5 D40a

PAS DE QUESTION D9

D10 Sexe du répondant.

	(683)
Homme	1
Femme	2

EB73.5 D10

D11 Quel est votre âge ?

(684-685)

EB73.5 D11

PAS DE QUESTIONS D12 A D14

PAS DE QUESTIONS D16 A D24

D25 Diriez-vous que vous vivez ... ?

(LIRE)

	(686)
Dans une commune rurale	1
Dans une ville petite ou moyenne	2
Dans une grande ville	3
NSP	4

EB73.5 D25

PAS DE QUESTIONS D26 A D39

D40a Pouvez-vous me dire combien de personnes âgées de 15 ans et plus vivent dans votre foyer, y compris vous-même ?

(ENQ. : LIRE - NOTER EN CLAIR)

(687-688)

EB73.5 D40a

D40b Could you tell me how many children less than 10 years old live in your household?

(INT.: READ OUT - WRITE DOWN)

(689-690)

--	--

EB73.5 D40b

D40c Could you tell me how many children aged 10 to 14 years old live in your household?

(INT.: READ OUT - WRITE DOWN)

(691-692)

--	--

EB73.5 D40c

NO QUESTIONS D41 AND D42

D46 Which of the following goods do you have?

(SHOW CARD - READ OUT - MULTIPLE ANSWERS POSSIBLE)

(693-702)

Television	1,
DVD player	2,
Music CD player	3,
Computer	4,
An Internet connection at home	5,
A car	6,
An apartment\ a house which you have finished paying for	7,
An apartment\ a house which you are paying for	8,
None (SPONTANEOUS)	9,
DK	10,

EB73.5 D46

D40b Pouvez-vous me dire combien d'enfants de moins de 10 ans vivent dans votre foyer ?

(ENQ. : LIRE - NOTER EN CLAIR)

(689-690)

--	--

EB73.5 D40b

D40c Pouvez-vous me dire combien d'enfants de 10 à 14 ans vivent dans votre foyer ?

(ENQ. : LIRE - NOTER EN CLAIR)

(691-692)

--	--

EB73.5 D40c

PAS DE QUESTIONS D41 ET D42

D46 Parmi les biens suivants, lesquels possédez-vous ?

(MONTRER CARTE - LIRE - PLUSIEURS REPONSES POSSIBLES)

(693-702)

Une télévision	1,
Un lecteur DVD	2,
Un lecteur CD audio	3,
Un ordinateur	4,
Une connexion Internet à la maison	5,
Une voiture	6,
Un appartement\ Une maison que vous avez fini de payer	7,
Un appartement\ Une maison que vous êtes en train de payer	8,
Aucun (SPONTANE)	9,
NSP	10,

EB73.5 D46

NO QUESTIONS D47 TO D59

D60 During the last twelve months, would you say you had difficulties to pay your bills at the end of the month...?

(SHOW CARD - READ OUT – ONE ANSWER ONLY)

	(703)
Most of the time	1
From time to time	2
Almost never\ never	3
Refusal (SPONTANEOUS)	4

EB73.5 D60

D61 On the following scale, step '1' corresponds to "the lowest level in the society"; step '10' corresponds to "the highest level in the society". Could you tell me on which step you would place yourself?

(SHOW CARD – ONE ANSWER ONLY)

	(704-705)
1 The lowest level in the society	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10 The highest level in the society	10
Refusal (SPONTANEOUS)	11

EB73.5 D61

PAS DE QUESTIONS D47 A D59

D60 Sur ces douze derniers mois, diriez-vous que vous avez eu des difficultés à payer toutes vos factures à la fin du mois ... ?

(MONTRER CARTE - LIRE - UNE SEULE REPONSE)

	(703)
La plupart du temps	1
De temps en temps	2
Pratiquement jamais\ jamais	3
Refus (SPONTANE)	4

EB73.5 D60

D61 Sur l'escalier suivant, la marche 1 correspond à la place la moins élevée dans la société, la marche 10 à la place la plus élevée dans la société. Pourriez-vous me dire sur quelle marche de cet escalier vous vous placeriez ?

(MONTRER CARTE - UNE SEULE REPONSE)

	(704-705)
1 La place la moins élevée dans la société	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10 La place la plus élevée dans la société	10
Refus (SPONTANE)	11

EB73.5 D61

D62

Could you tell me if...?

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Everyday \ Almost everyday	Two or three times a week	About once a week	Two or three times a month	Less often	Never	No Internet access (SPONTANEOUS)
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(706)

(706)

(707)

(707)

(708)

(708)

EB73.5 D62

D62

Pouvez-vous me dire si ... ?

(MONTRER CARTE AVEC ECHELLE - UNE REPONSE PAR LIGNE)

	(LIRE)	Tous les jours ou presque	Deux ou trois fois par semaine	Environ une fois par semaine	Deux ou trois fois par mois	Moins souvent	Jamais	Pas d'accès à Internet (SPONTANEOUS)
--	--------	---------------------------	--------------------------------	------------------------------	-----------------------------	---------------	--------	--------------------------------------

(706)

(707)

(708)

EB73.5 D62

TABLES

QB1.1 Avez-vous séjourné dans un autre pays de l'Union européenne pour raisons personnelles ... ?































Au cours des 12 derniers mois

QB1.1 Have you visited another EU country for private purposes...?

Within the past 12 months

QB1.1 Haben Sie aus privaten Gründen ein anderes Land der Europäischen Union besucht ...?

Innerhalb der letzten 12 Monate

		Oui, plusieurs fois Yes, on several occasions Ja, mehrmals	Oui, une ou deux fois seulement Yes, once or twice only Ja, nur ein oder zweimal	Non No Nein	Total 'Oui' Total 'Yes' Gesamt 'Ja'
%		EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	11	20	69	31
	BE	19	30	51	49
	BG	2	8	90	10
	CZ	11	23	66	34
	DK	33	36	31	69
	D-W	20	28	52	48
	DE	19	28	53	47
	D-E	14	27	59	41
	EE	14	21	65	35
	IE	9	36	55	45
	EL	3	10	87	13
	ES	5	10	85	15
	FR	7	14	79	21
	IT	7	17	76	24
	CY	7	39	54	46
	LV	9	19	72	28
	LT	11	12	77	23
	LU	43	30	27	73
	HU	6	17	77	23
	MT	9	25	66	34
	NL	38	34	28	72
	AT	19	31	50	50
	PL	9	11	80	20
	PT	10	9	81	19
	RO	7	12	81	19
	SI	25	24	51	49
	SK	20	28	52	48
	FI	11	41	48	52
	SE	23	37	40	60
	UK	8	25	67	33

QB1.2 Avez-vous séjourné dans un autre pays de l'Union européenne pour raisons personnelles ... ?





























Il y a 4 à 5 ans

QB1.2 Have you visited another EU country for private purposes...?

Between 4 and 5 years ago

QB1.2 Haben Sie aus privaten Gründen ein anderes Land der Europäischen Union besucht ...?





























Vor 4 bis 5 Jahren

		Oui, plusieurs fois Yes, on several occasions Ja, mehrmals	Oui, une ou deux fois seulement Yes, once or twice only Ja, nur ein oder zweimal	Non No Nein	Total 'Oui' Total 'Yes' Gesamt 'Ja'
%		EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	21	24	55	45
	BE	32	28	40	60
	BG	4	11	85	15
	CZ	22	30	48	52
	DK	46	37	17	83
	D-W	36	26	38	62
	DE	34	27	39	61
	D-E	28	29	43	57
	EE	26	24	50	50
	IE	21	31	48	52
	EL	5	15	80	20
	ES	11	17	72	28
	FR	15	19	66	34
	IT	7	25	68	32
	CY	13	45	42	58
	LV	18	25	57	43
	LT	16	15	69	31
	LU	53	18	29	71
	HU	12	24	64	36
	MT	17	34	49	51
	NL	59	23	18	82
	AT	24	35	41	59
	PL	18	16	66	34
	PT	13	13	74	26
	RO	9	16	75	25
	SI	41	21	38	62
	SK	26	35	39	61
	FI	24	42	34	66
	SE	42	34	24	76
	UK	27	30	43	57

QB2a Parmi les services de communication mobile suivants, lequel utilisez-vous le plus lors de séjours dans un autre pays de l'Union européenne ?

QB2a Which of the following mobile phone communication services do you use most when visiting another EU country?



























QB2a Welchen der folgenden Mobilfunkdienste nutzen Sie am häufigsten, wenn Sie ein anderes Land der Europäischen Union besuchen?

1/2		Emettre des appels	Recevoir des appels	Envoyer des messages textes	Recevoir des messages textes	Surfer sur Internet (pour envoyer et recevoir des courriers électroniques, accéder à des sites web, télécharger du contenu audio/ vidéo) avec votre téléphone mobile	Surfer sur Internet en utilisant des bornes WIFI (comme alternative à votre abonnement de téléphone mobile) avec votre téléphone mobile ou votre ordinateur portable	Vous achetez une carte SIM dans le pays de l'UE où vous séjournez
		Making voice calls	Receiving voice calls	Sending text messages	Receiving text messages	Surfing the Internet (sending and receiving e-mails, accessing websites, downloading audio/ video content) with your mobile phone	Surfing the Internet using WIFI hotspots (as an alternative to your mobile phone subscription) with your mobile phone or laptop	You purchase a SIM card in the EU country you are visiting
		Anrufe tätigen	Anrufe annehmen	Textnachrichten versenden	Textnachrichten (SMS) empfangen	Mit Ihrem Mobiltelefon im Internet surfen (um E-Mails zu senden und zu empfangen, auf Webseiten zuzugreifen, Audio-/ Videoinhalte runterzuladen)	Mit Ihrem Mobiltelefon oder Laptop über einen drahtlosen Internetzugangspunkt (als Alternative zu Ihrem Mobiltelefonabonnement) im Internet surfen	Sie kaufen eine SIM-Karte in dem Land der Europäischen Union, das Sie besuchen
	%	EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	30	10	25	5	2	2	2
	BE	20	11	46	8	1	1	2
	BG	29	11	14	1	1	1	6
	CZ	18	13	42	8	1	0	0
	DK	16	8	43	7	1	1	1
	D-W	35	14	18	2	1	2	2
	DE	33	13	17	3	1	2	2
	D-E	25	12	16	4	0	1	2
	EE	36	20	20	5	3	1	1
	IE	31	7	45	4	1	1	1
	EL	51	21	4	5	0	1	3
	ES	50	6	11	2	3	2	4
	FR	32	11	16	2	5	3	1
	IT	36	10	30	4	2	1	4
	CY	62	8	18	0	3	0	2
	LV	44	18	19	3	2	0	2
	LT	38	4	31	2	3	1	4
	LU	36	13	27	2	1	1	8
	HU	16	22	21	5	0	0	3
	MT	33	5	48	4	1	2	1
	NL	31	9	39	7	2	1	1
	AT	24	13	26	5	1	1	2
	PL	28	6	30	2	2	0	2
	PT	43	6	11	3	0	1	0
	RO	48	14	9	1	1	1	5
	SI	30	16	30	4	2	1	1
	SK	23	13	30	6	2	0	1
	FI	18	13	43	9	1	2	1
	SE	25	6	37	6	2	2	2
	UK	20	7	28	11	3	3	2

QB2a Parmi les services de communication mobile suivants, lequel utilisez-vous le plus lors de séjours dans un autre pays de l'Union européenne ?

QB2a Which of the following mobile phone communication services do you use most when visiting another EU country?































QB2a Welchen der folgenden Mobilfunkdienste nutzen Sie am häufigsten, wenn Sie ein anderes Land der Europäischen Union besuchen?

2/2		Normalement, vous éteignez votre téléphone mobile lors de séjours dans un autre pays de l'UE	Vous n'emportez pas votre téléphone mobile avec vous lors de séjours dans un autre pays de l'UE	Autre (SPONTANE)	NSP
		You normally switch off your mobile phone when in another EU country	You do not take your mobile phone with you when you are visiting another EU country	Other (SPONTANEOUS)	DK
		Sie schalten Ihr Mobiltelefon in der Regel aus, wenn Sie in einem anderen Land der EU sind	Sie nehmen Ihr Mobiltelefon nicht mit, wenn Sie ein anderes Land der EU besuchen	Andere (SPONTAN)	WN
%		EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	10	10	1	3
	BE	5	4	1	1
	BG	15	17	1	4
	CZ	10	7	0	1
	DK	14	7	1	1
	D-W	13	10	0	3
	DE	14	12	0	3
	D-E	19	18	1	2
	EE	6	6	1	1
	IE	3	6	0	1
	EL	6	8	0	1
	ES	6	7	5	4
	FR	11	13	1	5
	IT	5	4	0	4
	CY	2	4	1	0
	LV	3	5	0	4
	LT	7	3	4	3
	LU	6	4	1	1
	HU	18	13	0	2
	MT	2	4	0	0
	NL	5	3	1	1
	AT	16	11	0	1
	PL	11	15	1	3
	PT	14	18	3	1
	RO	7	5	2	7
	SI	9	5	2	0
	SK	12	10	1	2
	FI	8	4	1	0
	SE	11	7	1	1
	UK	8	14	2	2

QB2b Et quels autres services utilisez-vous habituellement lors de séjours dans un autre pays de l'Union européenne ? (PLUSIEURS REPONSES POSSIBLES)

QB2b And which other services do you usually use when visiting another EU country? (MULTIPLE ANSWERS POSSIBLE)































QB2b Und welche weiteren Dienste nutzen Sie gewöhnlich, wenn Sie ein anderes Land der Europäischen Union besuchen? (MEHRFACHNENNUNGEN MÖGLICH)

1/2			Emettre des appels	Recevoir des appels	Envoyer des messages textes	Recevoir des messages textes	Surfer sur Internet (pour envoyer et recevoir des courriers électroniques, accéder à des sites web, télécharger du contenu audio/ vidéo) avec votre téléphone mobile	Surfer sur Internet en utilisant des bornes WIFI (comme alternative à votre abonnement de téléphone mobile) avec votre téléphone mobile ou votre ordinateur portable
			Making voice calls	Receiving voice calls	Sending text messages	Receiving text messages	Surfing the Internet (sending and receiving e-mails, accessing websites, downloading audio/ video content) with your mobile phone	Surfing the Internet using WIFI hotspots (as an alternative to your mobile phone subscription) with your mobile phone or laptop
			Anrufe tätigen	Anrufe annehmen	Textnachrichten versenden	Textnachrichten (SMS) empfangen	Mit Ihrem Mobiltelefon im Internet surfen (um E-Mails zu senden und zu empfangen, auf Webseiten zuzugreifen, Audio-/ Videoinhalte runterzuladen)	Mit Ihrem Mobiltelefon oder Laptop über einen drahtlosen Internetzugangspunkt (als Alternative zu Ihrem Mobiltelefonabonnement) im Internet surfen
	%		EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	22	41	31	41	7	4	
	BE	22	24	24	37	8	3	
	BG	20	47	38	28	8	4	
	CZ	18	32	32	62	2	2	
	DK	29	37	29	66	8	7	
	D-W	23	51	35	43	3	4	
	DE	23	49	33	40	3	3	
	D-E	22	43	28	25	1	1	
	EE	23	44	38	35	7	8	
	IE	22	50	37	64	8	3	
	EL	26	65	52	46	5	3	
	ES	11	44	31	29	14	3	
	FR	17	41	26	32	12	9	
	IT	21	37	28	31	3	1	
	CY	26	88	51	57	9	7	
	LV	19	55	37	42	5	2	
	LT	17	44	29	44	12	8	
	LU	26	46	23	37	3	9	
	HU	24	27	39	43	2	1	
	MT	27	46	32	64	5	4	
	NL	28	38	29	47	6	6	
	AT	29	48	29	48	6	3	
	PL	21	43	32	46	9	3	
	PT	17	73	20	20	6	2	
	RO	16	43	42	37	9	2	
	SI	21	43	29	39	5	4	
	SK	18	41	34	54	5	2	
	FI	36	42	35	59	7	5	
	SE	28	37	34	53	12	8	
	UK	23	33	32	43	9	4	

QB2b Et quels autres services utilisez-vous habituellement lors de séjours dans un autre pays de l'Union européenne ? (PLUSIEURS REPONSES POSSIBLES)

QB2b And which other services do you usually use when visiting another EU country? (MULTIPLE ANSWERS POSSIBLE)































QB2b Und welche weiteren Dienste nutzen Sie gewöhnlich, wenn Sie ein anderes Land der Europäischen Union besuchen? (MEHRFACHNENNUNGEN MÖGLICH)

2/2		Personne	NSP
		None	DK
		Nichts davon	WN
	%	EB 74.1	EB 74.1
	EU 27	11	1
	BE	32	0
	BG	6	10
	CZ	4	0
	DK	6	0
	D-W	6	0
	DE	7	0
	D-E	9	1
	EE	2	6
	IE	10	2
	EL	4	1
	ES	30	1
	FR	13	2
	IT	21	0
	CY	1	0
	LV	8	0
	LT	4	1
	LU	5	0
	HU	17	5
	MT	3	1
	NL	6	0
	AT	4	0
	PL	8	0
	PT	4	0
	RO	6	17
	SI	7	0
	SK	4	0
	FI	5	1
	SE	7	5
	UK	9	0

QB2T Les services de communication mobile utilisés le plus dans un autre pays de l'UE - TOTAL

QB2T Mobile phone communication services used the most in another EU country - TOTAL































QB2T Les services de communication mobile utilisés le plus dans un autre pays de l'UE - TOTAL

1/2		Emettre des appels	Recevoir des appels	Envoyer des messages textes	Recevoir des messages textes	Surfer sur Internet (pour envoyer et recevoir des courriers électroniques, accéder à des sites web, télécharger du contenu audio/ vidéo) avec votre téléphone mobile	Surfer sur Internet en utilisant des bornes WIFI (comme alternative à votre abonnement de téléphone mobile) avec votre téléphone mobile ou votre ordinateur portable
		Making voice calls	Receiving voice calls	Sending text messages	Receiving text messages	Surfing the Internet (sending and receiving e-mails, accessing websites, downloading audio/ video content) with your mobile phone	Surfing the Internet using WIFI hotspots (as an alternative to your mobile phone subscription) with your mobile phone or laptop
		Anrufe tätigen	Anrufe annehmen	Textnachrichten versenden	Textnachrichten (SMS) empfangen	Mit Ihrem Mobiltelefon im Internet surfen (um E-Mails zu senden und zu empfangen, auf Webseiten zuzugreifen, Audio-/ Videoinhalte runterzuladen)	Mit Ihrem Mobiltelefon oder Laptop über einen drahtlosen Internetzugangspunkt (als Alternative zu Ihrem Mobiltelefonabonnement) im Internet surfen
%		EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	47	41	49	36	7	5
	BE	39	32	67	41	8	4
	BG	41	38	36	17	6	4
	CZ	33	39	68	59	2	2
	DK	38	36	66	57	7	7
	D-W	52	50	42	33	3	5
	DE	49	47	40	30	3	4
	D-E	38	36	32	19	1	2
	EE	56	58	52	35	9	8
	IE	51	52	78	62	9	4
	EL	72	73	46	42	4	3
	ES	58	38	34	23	13	4
	FR	44	39	34	25	13	10
	IT	54	40	53	30	4	2
	CY	86	87	64	52	11	6
	LV	61	65	51	39	6	2
	LT	51	39	54	37	13	8
	LU	57	50	45	31	4	8
	HU	31	39	46	33	2	1
	MT	59	47	77	63	6	5
	NL	55	43	65	49	8	6
	AT	45	47	46	39	5	3
	PL	43	36	53	34	9	2
	PT	54	53	23	17	4	2
	RO	60	46	40	29	8	2
	SI	48	51	54	36	7	4
	SK	36	43	55	46	6	2
	FI	49	50	73	60	7	6
	SE	46	35	64	47	11	8
	UK	36	31	51	42	9	5

QB2T Les services de communication mobile utilisés le plus dans un autre pays de l'UE - TOTAL

QB2T Mobile phone communication services used the most in another EU country - TOTAL

QB2T Les services de communication mobile utilisés le plus dans un autre pays de l'UE - TOTAL

2/2		Vous achetez une carte SIM dans le pays de l'UE où vous séjournez	Normalement, vous éteignez votre téléphone mobile lors de séjours dans un autre pays de l'UE	Vous n'empportez pas votre téléphone mobile avec vous lors de séjours dans un autre pays de l'UE	Autre (SPONTANE)	NSP
		You purchase a SIM card in the EU country you are visiting	You normally switch off your mobile phone when in another EU country	You do not take your mobile phone with you when you are visiting another EU country	Other (SPONTANEOUS)	DK
		Sie kaufen eine SIM-Karte in dem Land der Europäischen Union, das Sie besuchen	Sie schalten Ihr Mobiltelefon in der Regel aus, wenn Sie in einem anderen Land der EU sind	Sie nehmen Ihr Mobiltelefon nicht mit, wenn Sie ein anderes Land der EU besuchen	Andere (SPONTAN)	WN
%		EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	2	10	10	1	3
	BE	2	5	4	1	1
	BG	6	15	18	1	4
	CZ	0	10	7	0	1
	DK	1	14	7	1	1
	D-W	2	13	10	0	3
	DE	2	14	12	0	3
	D-E	2	19	18	1	2
	EE	1	6	6	1	1
	IE	1	3	6	0	1
	EL	3	6	8	0	1
	ES	4	6	7	5	4
	FR	2	11	13	1	5
	IT	4	5	5	0	4
	CY	2	2	4	1	0
	LV	2	3	5	0	4
	LT	4	6	3	4	3
	LU	7	6	4	1	1
	HU	3	18	13	0	2
	MT	1	2	4	0	0
	NL	1	5	3	2	1
	AT	2	16	11	0	1
	PL	2	11	14	1	3
	PT	0	14	18	3	1
	RO	5	7	5	1	7
	SI	1	9	5	2	0
	SK	1	12	10	1	2
	FI	1	8	4	1	1
	SE	2	11	8	1	1
	UK	2	8	14	1	2

QB3.1 Comparé à la situation d'il y a 4 ans, diriez-vous que vous utilisez plus souvent, moins souvent ou aussi souvent les services de téléphonie mobile pendant vos séjours dans un autre pays de l'Union européenne ?





























Emettre des appels depuis votre téléphone mobile lors de séjours dans un autre pays de l'Union européenne

QB3.1 Compared to the situation 4 years ago, would you say that you use the following mobile phone services more frequently, less frequently or with the same frequency while you are visiting another EU country?

Making voice calls with your mobile phone while visiting another EU country

QB3.1 Würden Sie sagen, dass Sie die folgenden Mobilfunkdienste im Vergleich zu vor 4 Jahren häufiger, seltener oder genauso oft nutzen, wenn Sie ein anderes Land der Europäischen Union besuchen?

Während Ihres Besuchs in einem anderen Land der Europäischen Union Anrufe mit Ihrem Mobiltelefon tätigen

		Plus souvent	Moins souvent	Aussi souvent	Ne s'applique pas/ Non concerné (SPONTANE)	NSP
		More frequently	Less often	The same frequency	Not applicable (SPONTANEOUS)	DK
		Häufiger	Seltener	Genauso oft	Trifft nicht zu (SPONTAN)	WN
%		EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	27	24	44	3	2
	BE	38	21	38	3	0
	BG	25	23	44	4	4
	CZ	30	33	31	5	1
	DK	43	10	44	2	1
	D-W	22	24	51	2	1
	DE	22	23	53	1	1
	D-E	18	21	60	1	0
	EE	29	21	38	8	4
	IE	21	19	55	2	3
	EL	16	19	52	11	2
	ES	16	40	35	6	3
	FR	29	18	44	4	5
	IT	22	24	48	1	5
	CY	23	25	48	2	2
	LV	16	22	46	14	2
	LT	20	42	30	6	2
	LU	35	24	35	4	2
	HU	14	28	50	7	1
	MT	30	16	49	3	2
	NL	43	14	41	1	1
	AT	30	14	52	2	2
	PL	28	22	39	6	5
	PT	24	27	45	3	1
	RO	30	23	41	1	5
	SI	23	30	43	2	2
	SK	34	29	34	2	1
	FI	25	25	47	1	2
	SE	42	12	41	3	2
	UK	30	28	38	2	2

QB3.2 Comparé à la situation d'il y a 4 ans, diriez-vous que vous utilisez plus souvent, moins souvent ou aussi souvent les services de téléphonie mobile pendant vos séjours dans un autre pays de l'Union européenne ?




























Recevoir des appels sur votre téléphone mobile lors de séjours dans un autre pays de l'Union européenne

QB3.2 Compared to the situation 4 years ago, would you say that you use the following mobile phone services more frequently, less frequently or with the same frequency while you are visiting another EU country?

Receiving voice calls on your mobile phone while visiting another EU country

QB3.2 Würden Sie sagen, dass Sie die folgenden Mobilfunkdienste im Vergleich zu vor 4 Jahren häufiger, seltener oder genauso oft nutzen, wenn Sie ein anderes Land der Europäischen Union besuchen?

Während Ihres Besuchs in einem anderen Land der Europäischen Union Anrufe mit Ihrem Mobiltelefon annehmen

		Plus souvent	Moins souvent	Aussi souvent	Ne s'applique pas/ Non concerné (SPONTANE)	NSP
		More frequently	Less often	The same frequency	Not applicable (SPONTANEOUS)	DK
		Häufiger	Seltener	Genauso oft	Trifft nicht zu (SPONTAN)	WN
%		EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	26	23	46	3	2
	BE	39	18	39	4	0
	BG	29	20	45	2	4
	CZ	25	28	42	4	1
	DK	40	8	49	2	1
	D-W	21	22	54	2	1
	DE	20	22	55	2	1
	D-E	14	26	58	1	1
	EE	30	19	40	7	4
	IE	20	17	56	3	4
	EL	16	17	53	10	4
	ES	17	41	36	6	0
	FR	31	21	38	7	3
	IT	20	24	49	1	6
	CY	20	24	51	3	2
	LV	15	22	46	14	3
	LT	22	34	35	6	3
	LU	34	25	33	7	1
	HU	14	23	52	9	2
	MT	34	14	46	3	3
	NL	43	16	39	2	0
	AT	28	15	52	3	2
	PL	33	19	40	3	5
	PT	23	26	46	3	2
	RO	23	22	46	3	6
	SI	22	28	47	1	2
	SK	33	28	35	3	1
	FI	23	21	54	1	1
	SE	39	8	49	3	1
	UK	27	30	37	3	3

QB3.3 Comparé à la situation d'il y a 4 ans, diriez-vous que vous utilisez plus souvent, moins souvent ou aussi souvent les services de téléphonie mobile pendant vos séjours dans un autre pays de l'Union européenne ?































Envoyer des messages textes depuis votre téléphone mobile lors de séjours dans un autre pays de l'Union européenne

QB3.3 Compared to the situation 4 years ago, would you say that you use the following mobile phone services more frequently, less frequently or with the same frequency while you are visiting another EU country?

Sending text messages with your mobile phone while visiting another EU country

QB3.3 Würden Sie sagen, dass Sie die folgenden Mobilfunkdienste im Vergleich zu vor 4 Jahren häufiger, seltener oder genauso oft nutzen, wenn Sie ein anderes Land der Europäischen Union besuchen?

Während Ihres Besuchs in einem anderen Land der Europäischen Union Textnachrichten (SMS) mit Ihrem Mobiltelefon versenden

		Plus souvent	Moins souvent	Aussi souvent	Ne s'applique pas/ Non concerné (SPONTANE)	NSP
		More frequently	Less often	The same frequency	Not applicable (SPONTANEOUS)	DK
		Häufiger	Seltener	Genauso oft	Trifft nicht zu (SPONTAN)	WN
%		EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	37	20	38	3	2
	BE	40	20	39	1	0
	BG	34	11	50	0	5
	CZ	32	24	38	3	3
	DK	52	6	40	1	1
	D-W	31	22	45	2	0
	DE	29	23	46	2	0
	D-E	23	23	52	2	0
	EE	30	16	42	8	4
	IE	31	14	49	2	4
	EL	20	10	52	11	7
	ES	22	38	35	1	4
	FR	43	16	34	6	1
	IT	32	17	47	2	2
	CY	34	14	43	7	2
	LV	19	23	44	11	3
	LT	32	33	24	8	3
	LU	46	17	33	3	1
	HU	23	27	46	4	0
	MT	39	12	43	5	1
	NL	57	8	34	1	0
	AT	36	14	46	2	2
	PL	29	24	35	5	7
	PT	25	32	31	8	4
	RO	31	22	41	3	3
	SI	27	21	49	2	1
	SK	30	24	44	1	1
	FI	29	18	49	4	0
	SE	58	7	31	3	1
	UK	44	24	26	4	2































QB4.1 Dans quelle mesure êtes-vous d'accord ou pas d'accord avec chacune des propositions suivantes ?
 Au cours des 4 dernières années, le coût des services de téléphonie mobile lors de séjours dans un autre pays de l'Union européenne ont baissé

QB4.1 To what extent do you agree or disagree with each of the following statements?

Over the last four years, the cost of mobile phone services while visiting another EU country have decreased

QB4.1 Inwieweit stimmen Sie den folgenden Aussagen zu oder nicht zu?

Im Laufe der letzten vier Jahre sind die Kosten für die Nutzung von Mobilfunkdiensten während des Besuchs in einem anderen Land der Europäischen Union gesunken

1/2		Tout à fait d'accord	Plutôt d'accord	Plutôt pas d'accord	Pas du tout d'accord	Ne s'applique pas/ Non concerné (SPONTANE)	NSP
		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Not applicable (SPONTANEOUS)	DK
		Stimme voll und ganz zu	Stimme eher zu	Stimme eher nicht zu	Stimme überhaupt nicht zu	Trifft nicht zu (SPONTAN)	WN
		EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1
	%						
	EU 27	17	37	14	8	3	21
	BE	11	47	18	11	4	9
	BG	16	30	10	7	4	33
	CZ	16	52	15	2	3	12
	DK	31	32	12	7	3	15
	D-W	29	39	12	6	1	13
	DE	26	39	13	6	2	14
	D-E	19	40	15	5	4	17
	EE	22	33	12	6	9	18
	IE	18	44	11	7	1	19
	EL	4	33	23	9	5	26
	ES	7	30	16	18	4	25
	FR	6	24	19	16	3	32
	IT	6	42	15	10	2	25
	CY	18	21	14	10	0	37
	LV	21	39	13	4	12	11
	LT	24	32	11	7	7	19
	LU	17	37	14	11	2	19
	HU	12	44	11	8	10	15
	MT	18	32	13	9	3	25
	NL	23	37	13	8	1	18
	AT	22	46	14	3	2	13
	PL	25	38	11	1	5	20
	PT	10	32	18	5	10	25
	RO	18	34	17	5	4	22
	SI	20	42	15	8	2	13
	SK	13	53	17	2	5	10
	FI	16	40	14	4	3	23
	SE	28	36	7	3	2	24
	UK	15	35	15	7	4	24





























QB4.1 Dans quelle mesure êtes-vous d'accord ou pas d'accord avec chacune des propositions suivantes ?
 Au cours des 4 dernières années, le coût des services de téléphonie mobile lors de séjours dans un autre pays de l'Union européenne ont baissé

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QB4.1 Inwieweit stimmen Sie den folgenden Aussagen zu oder nicht zu?

Im Laufe der letzten vier Jahre sind die Kosten für die Nutzung von Mobilfunkdiensten während des Besuchs in einem anderen Land der Europäischen Union gesunken

2/2		Total 'D'accord'	Total 'Pas d'accord'
		Total 'Agree'	Total 'Disagree'
		Gesamt 'Stimme zu'	Gesamt 'Stimme nicht zu'
		EB 74.1	EB 74.1
<div> <div>%</div> <div>  EU 27  BE  BG  CZ  DK D-W  DE D-E  EE  IE  EL  ES  FR  IT  CY  LV  LT  LU  HU  MT  NL  AT  PL  PT  RO  SI  SK  FI  SE  UK </div> </div>			
		54	22
		58	29
		46	17
		68	17
		63	19
		68	18
		65	19
		59	20
		55	18
		62	18
		37	32
		37	34
		30	35
		48	25
		39	24
		60	17
		56	18
		54	25
		56	19
		50	22
		60	21
		68	17
		63	12
		42	23
		52	22
		62	23
		66	19
		56	18
		64	10
		50	22

QB4.2 Dans quelle mesure êtes-vous d'accord ou pas d'accord avec chacune des propositions suivantes ?































Vous limitez vos appels depuis votre téléphone mobile pendant vos séjours dans un autre pays de l'Union européenne car vous êtes préoccupé(e) par les coûts

QB4.2 To what extent do you agree or disagree with each of the following statements?

You limit your mobile voice calls while you are visiting another EU country because you are concerned about the costs

QB4.2 Inwieweit stimmen Sie den folgenden Aussagen zu oder nicht zu?

Sie begrenzen während des Besuchs in einem anderen Land der Europäischen Union die Anzahl Ihrer Anrufe vom Mobiltelefon, weil Sie sich Sorgen wegen der Kosten machen

1/2		Tout à fait d'accord	Plutôt d'accord	Plutôt pas d'accord	Pas du tout d'accord	Ne s'applique pas/ Non concerné (SPONTANE)	NSP
		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Not applicable (SPONTANEOUS)	DK
		Stimme voll und ganz zu	Stimme eher zu	Stimme eher nicht zu	Stimme überhaupt nicht zu	Trifft nicht zu (SPONTAN)	WN
%		EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	41	31	10	6	6	6
	BE	44	36	9	5	4	2
	BG	32	28	14	3	11	12
	CZ	36	40	15	3	5	1
	DK	59	19	6	5	7	4
	D-W	43	28	12	9	5	3
	DE	44	28	12	7	6	3
	D-E	46	27	14	3	8	2
	EE	46	30	7	5	7	5
	IE	39	33	8	4	9	7
	EL	18	39	17	10	12	4
	ES	48	23	10	7	5	7
	FR	47	26	6	4	6	11
	IT	29	43	14	4	3	7
	CY	28	30	14	12	3	13
	LV	45	27	10	5	8	5
	LT	48	32	4	6	5	5
	LU	39	30	11	10	6	4
	HU	38	32	12	5	8	5
	MT	33	39	6	9	6	7
	NL	48	28	10	10	3	1
	AT	31	32	20	6	9	2
	PL	29	33	13	5	9	11
	PT	27	34	16	3	12	8
	RO	25	38	11	5	5	16
	SI	40	30	10	8	6	6
	SK	29	46	14	3	6	2
	FI	40	31	11	7	4	7
	SE	58	23	3	6	7	3
	UK	45	30	6	3	9	7

QB4.2 Dans quelle mesure êtes-vous d'accord ou pas d'accord avec chacune des propositions suivantes ?
 Vous limitez vos appels depuis votre téléphone mobile pendant vos séjours dans un autre pays de l'Union européenne car vous êtes préoccupé(e) par les coûts

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Sie begrenzen während des Besuchs in einem anderen Land der Europäischen Union die Anzahl Ihrer Anrufe vom Mobiltelefon, weil Sie sich Sorgen wegen der Kosten machen

2/2		Total 'D'accord'	Total 'Pas d'accord'
		Total 'Agree'	Total 'Disagree'
		Gesamt 'Stimme zu'	Gesamt 'Stimme nicht zu'
		EB 74.1	EB 74.1
		72	16
		80	14
		60	17
		76	18
		78	11
		71	21
		72	19
		73	17
		76	12
		72	12
		57	27
		71	17
		73	10
		72	18
		58	26
		72	15
		80	10
		69	21
		70	17
		72	15
		76	20
		63	26
		62	18
		61	19
		63	16
		70	18
		75	17
		71	18
		81	9
		75	9

%

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	FR
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	CY
	LV
	LT
	LU
	HU
	MT
	NL
	AT
	PL
	PT
	RO
	SI
	SK
	FI
	SE
	UK

QB4.3 Dans quelle mesure êtes-vous d'accord ou pas d'accord avec chacune des propositions suivantes ?





























Le coût pour surfer sur Internet avec un téléphone mobile lors de séjours dans un autre pays de l'Union européenne est correct

QB4.3 To what extent do you agree or disagree with each of the following statements?

The cost of surfing the Internet with a mobile phone while visiting another EU country is fair

QB4.3 Inwieweit stimmen Sie den folgenden Aussagen zu oder nicht zu?

Die Kosten, die erhoben werden, wenn Sie während des Besuchs in einem anderen Land der Europäischen Union mit Ihrem Mobiltelefon im Internet surfen, sind angemessen

1/2		Tout à fait d'accord	Plutôt d'accord	Plutôt pas d'accord	Pas du tout d'accord	Ne s'applique pas/ Non concerné (SPONTANE)	NSP
		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Not applicable (SPONTANEOUS)	DK
		Stimme voll und ganz zu	Stimme eher zu	Stimme eher nicht zu	Stimme überhaupt nicht zu	Trifft nicht zu (SPONTAN)	WN
%		EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1	EB 74.1
	EU 27	4	15	18	17	17	29
	BE	3	19	18	21	27	12
	BG	5	12	6	2	24	51
	CZ	2	16	23	16	8	35
	DK	3	10	12	24	22	29
	D-W	6	16	28	18	13	19
	DE	5	16	28	19	13	19
	D-E	3	15	29	21	15	17
	EE	6	14	14	17	21	28
	IE	3	13	8	13	21	42
	EL	2	10	12	10	30	36
	ES	3	12	14	16	17	38
	FR	3	13	14	21	15	34
	IT	4	23	18	8	10	37
	CY	4	6	3	4	41	42
	LV	4	16	14	7	37	22
	LT	7	18	12	11	17	35
	LU	2	8	11	21	34	24
	HU	3	9	12	23	27	26
	MT	4	8	12	9	18	49
	NL	2	7	13	27	23	28
	AT	4	20	26	16	12	22
	PL	3	10	15	16	23	33
	PT	4	11	13	6	31	35
	RO	5	16	7	3	21	48
	SI	4	16	14	16	16	34
	SK	4	27	20	8	21	20
	FI	3	10	16	21	18	32
	SE	3	9	10	32	18	28
	UK	4	14	17	17	19	29

QB4.3 Dans quelle mesure êtes-vous d'accord ou pas d'accord avec chacune des propositions suivantes ?

Le coût pour surfer sur Internet avec un téléphone mobile lors de séjours dans un autre pays de l'Union européenne est correct

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The cost of surfing the Internet with a mobile phone while visiting another EU country is fair

QB4.3 Inwieweit stimmen Sie den folgenden Aussagen zu oder nicht zu?

Die Kosten, die erhoben werden, wenn Sie während des Besuchs in einem anderen Land der Europäischen Union mit Ihrem Mobiltelefon im Internet surfen, sind angemessen

2/2		Total 'D'accord'	Total 'Pas d'accord'
		Total 'Agree'	Total 'Disagree'
		Gesamt 'Stimme zu'	Gesamt 'Stimme nicht zu'
		EB 74.1	EB 74.1
		19	35
		22	39
		17	8
		18	39
		13	36
		22	46
		21	47
		18	50
		20	31
		16	21
		12	22
		15	30
		16	35
		27	26
		10	7
		20	21
		25	23
		10	32
		12	35
		12	21
		9	40
		24	42
		13	31
		15	19
		21	10
		20	30
		31	28
		13	37
		12	42
		18	34

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	FI
	SE
	UK