



ComReg Mobile Roaming Research

November 2010



Commission for
Communications Regulation



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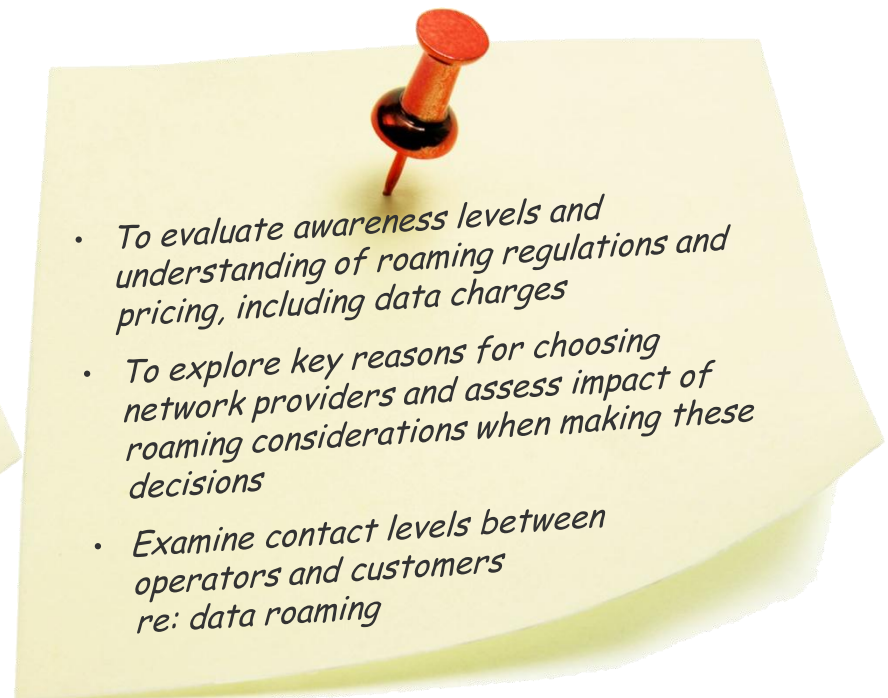
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Background – A changing roaming landscape

- In recent years, compulsory maximum EU roaming rates were imposed on mobile network operators which overcame the much criticised “roaming rip-off” (Source: EU Telecoms Commissioner Viviane Reding) that mobile customers were experiencing when travelling abroad in Europe.
 - Following the introduction of this cap and greater transparency, and hence the minimisation of potential ‘bill shock’, the volume of EU data roaming traffic increased by 52% between 2008 and 2009 (ComReg).
- This year further regulation was introduced which requires network providers to offer their subscribers a cut-off limit of €50+VAT as a default roaming charge, unless they choose another amount. Within this requirement a warning must be sent as the bill approaches 80% of its limit.
- In addition to this, charges for both making and receiving calls abroad have been further reduced (on top of reductions made in 2009) and there are no longer charges for consumers to receive voicemail messages. Text messages remain free to receive and cost the same to send as per the lower rate introduced in 2009.
- In light of these recent changes, ComReg commissioned research in order to examine the current behaviour and attitudes of mobile phone owners when roaming in Europe. Gathering this information will place ComReg in a position to better understand Irish mobile users abroad and to identify ways and means to promote value for money and improved transparency for consumers whilst roaming.

Research Objectives

- The main aim of this research is to focus on consumer usage of their mobile phones when in Europe, including Norway and Iceland.



- To inform ComReg of the current roaming landscape in order help develop strategies for future regulation decisions and objectives.
- To provide deliverables that are suitable for publication and which can be easily accessed and interrogated by ComReg stakeholders.

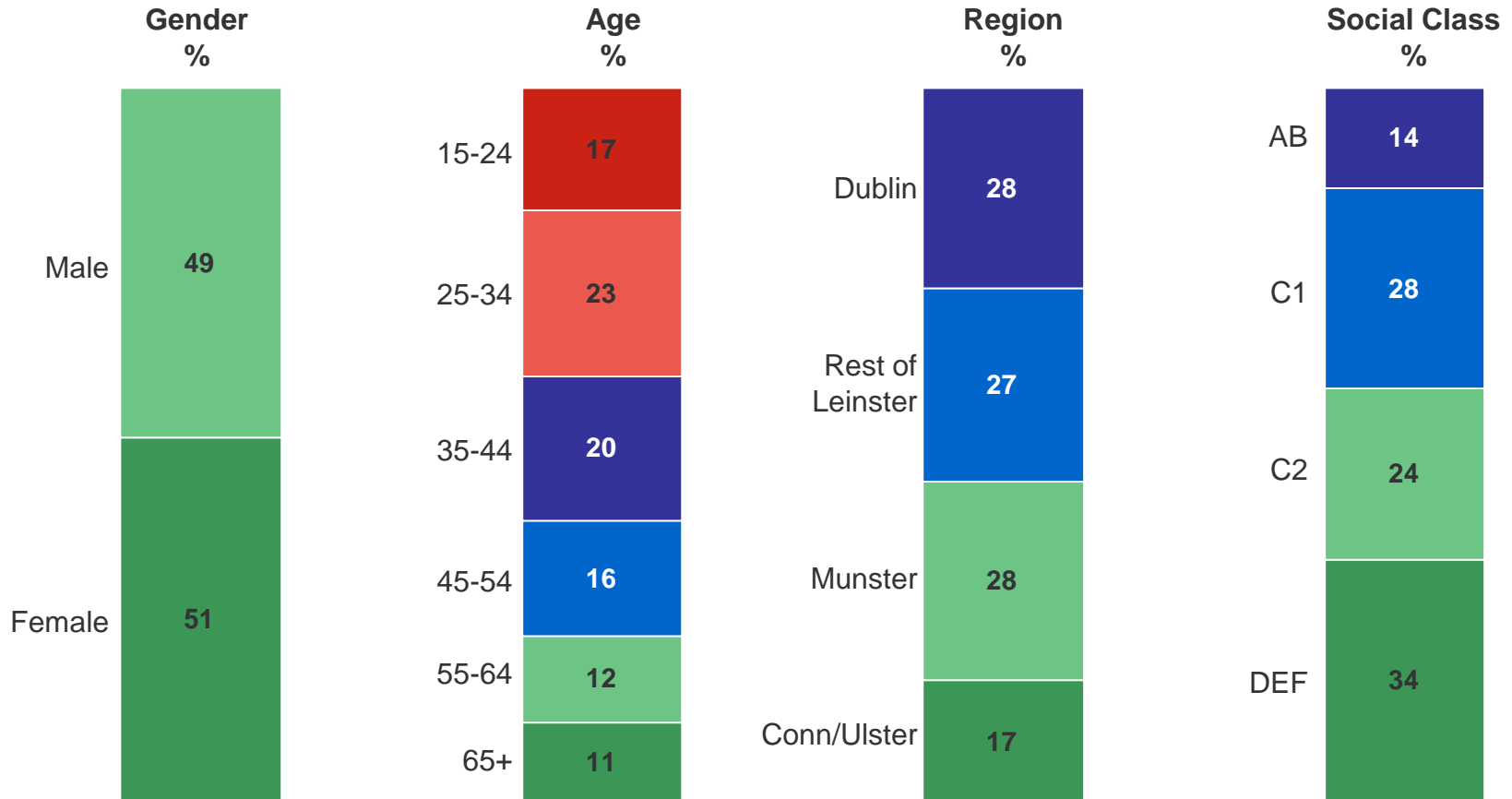
Methodology

- A quantitative face to face survey was held among a nationally representative sample of mobile phone owners/ users.
- Quota controls were set on gender, age, social class, region according to JNLR data Sept '09 – Oct '10.
- 1,007 interviews were conducted
 - Fieldwork dates: 22nd September – 8th Oct 2010



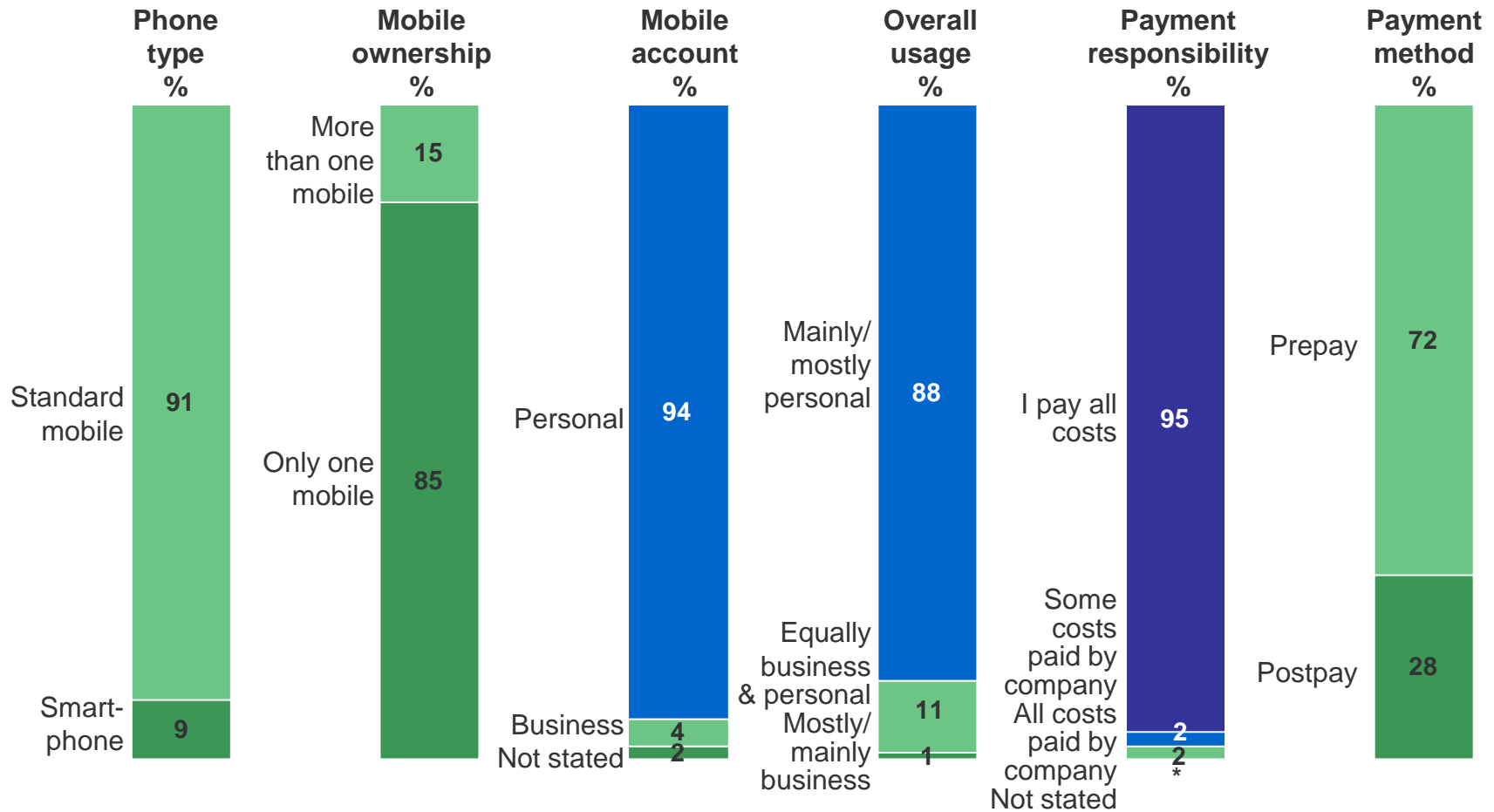
Sample Details

Sample Details



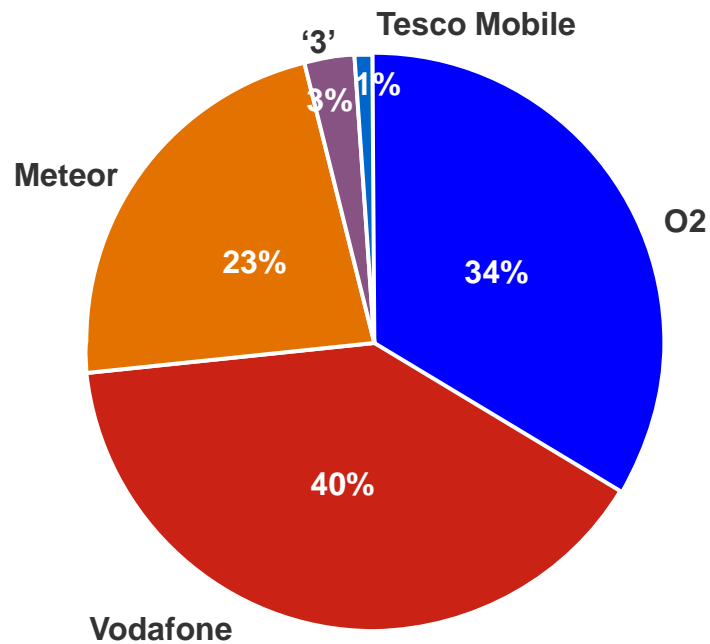
General Mobile Ownership & Usage

- Q.Ai Do you have a standard mobile phone or a Smartphone, such as Blackberry or iPhone or other similar, advanced feature mobile phone?
- Q.1a Do you have more than one mobile phone?
- Q.1b Is your mobile phone on a personal account or on a business account?
- Q.1c Do you use your mobile; only for personal reasons, mostly for personal reasons; both for personal and business reasons; mostly for business or only for business reasons?
- Q.1d Do you pay all of the cost of the phone or is some of the cost of the phone paid for by your company or is all of the cost of the phone paid for by your company?
- Q.2 Is your mobile phone a Pre-pay/ Credit phone or is it a Post-pay/ Bill phone?



Mobile Phone Network Provider

Q.3 Which mobile phone network are you with?



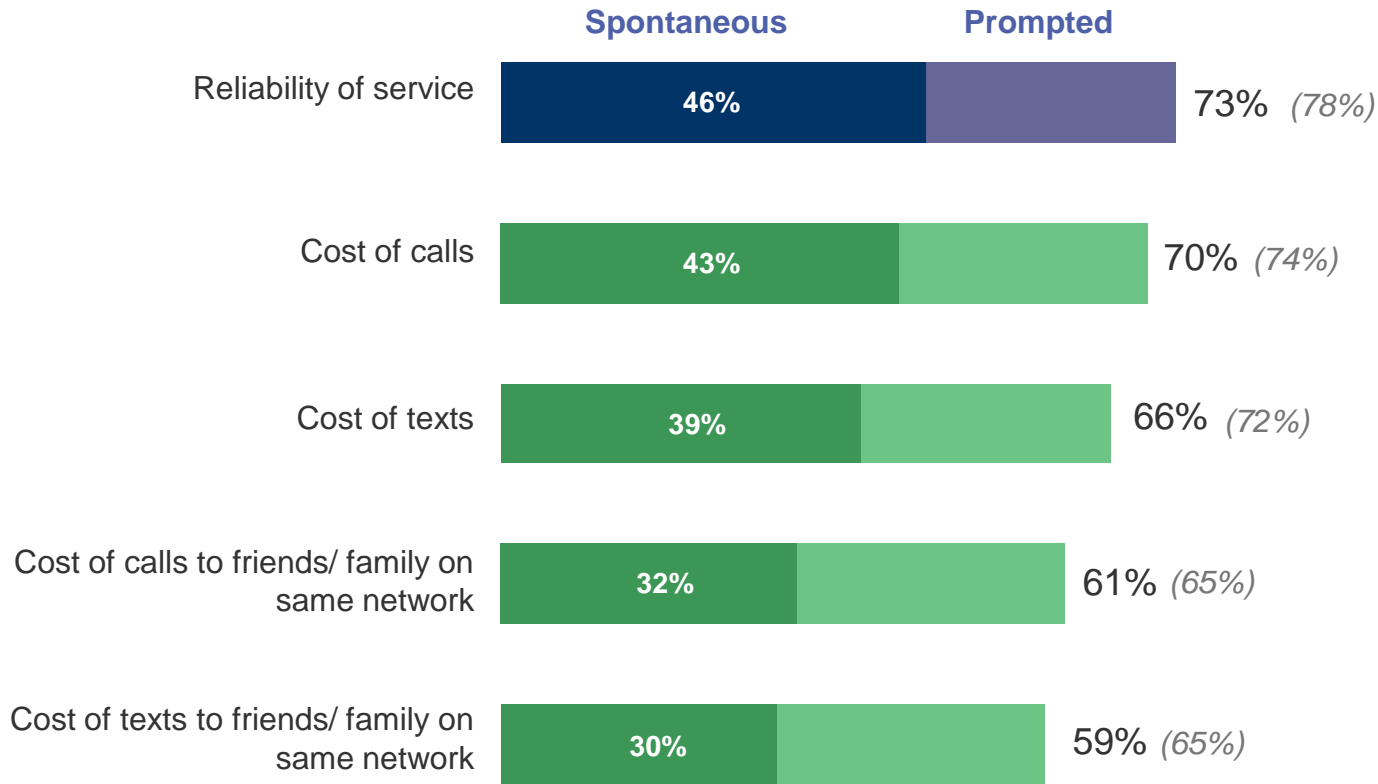
The image shows three doors set in a light-colored brick wall. From left to right: a brown door with the number '112', a red door with the numbers '112A' and '111A', and a blue door with the number '111'. Each door has a mail slot and a small window above it. The text 'Choosing a Mobile Phone Provider' is overlaid in the center.

Choosing a Mobile Phone Provider

Top 5 reasons for choosing a network provider

Q.4 Why did you choose [INSERT NAME FROM Q3] as your mobile phone network?

Q.5 At the time, which of the following aspects did you consider when you decided to go with [INSERT NAME FROM Q.3]? Please tell me 'Yes' or 'No' for each one.



Overall, these factors tend to be of more importance to the:

- 15-35 yr old age bracket,
- social class AB,
- bill pay customers and
- those with a monthly mobile spend €41- €100.

() = All who used their phone for some purpose when last in Europe

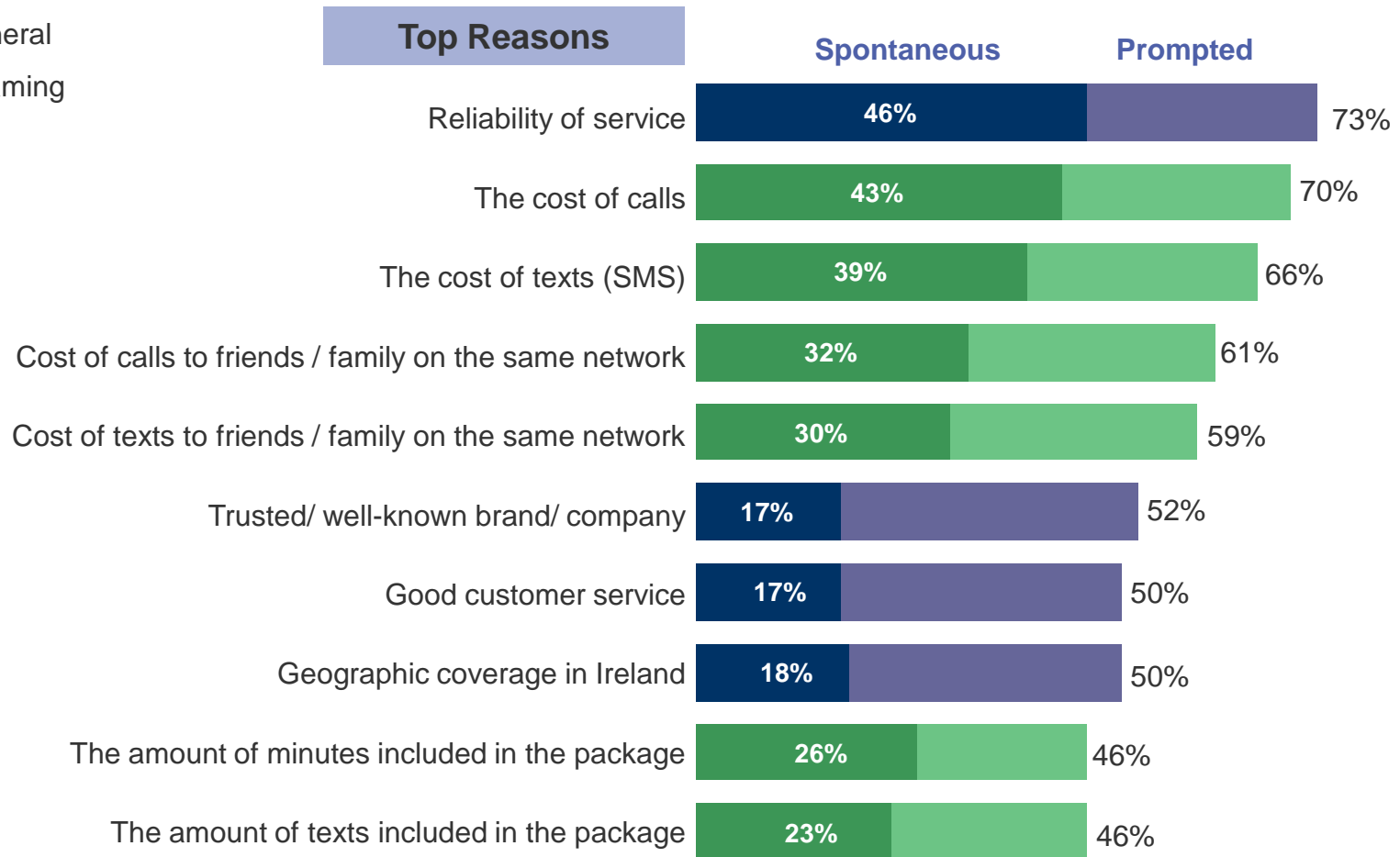
Reliability of service was the key consideration for consumers. Unsurprisingly, the actual cost of calls and texts dominate consumer decisions about network provider, with focus paid to same network criteria.

Main reasons to choose a mobile phone network?

Q.4 Why did you choose [INSERT NAME FROM Q3] as your mobile phone network?

Q.5 At the time, which of the following aspects did you consider when you decided to go with [INSERT NAME FROM Q.3]? Please tell me 'Yes' or 'No' for each one.

- Cost: General
- Cost: Roaming
- Service
- Handset
- Other



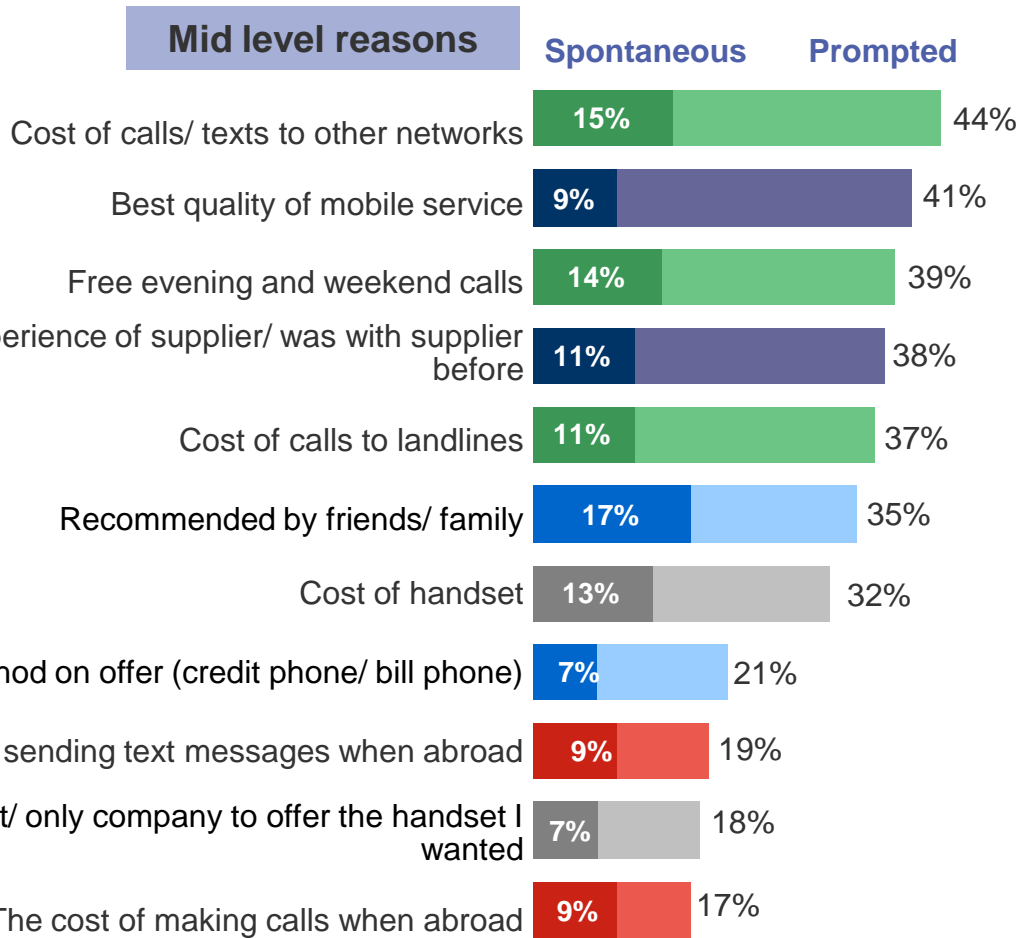
Reasons related to service and various elements of calls and text costs are the key factors that consumers considered when choosing their network provider.

Mid level reasons to choose a mobile phone network?

Q.4 Why did you choose [INSERT NAME FROM Q3] as your mobile phone network?

Q.5 At the time, which of the following aspects did you consider when you decided to go with [INSERT NAME FROM Q.3]? Please tell me 'Yes' or 'No' for each one.

- Cost: General
- Cost: Roaming
- Service
- Handset
- Other

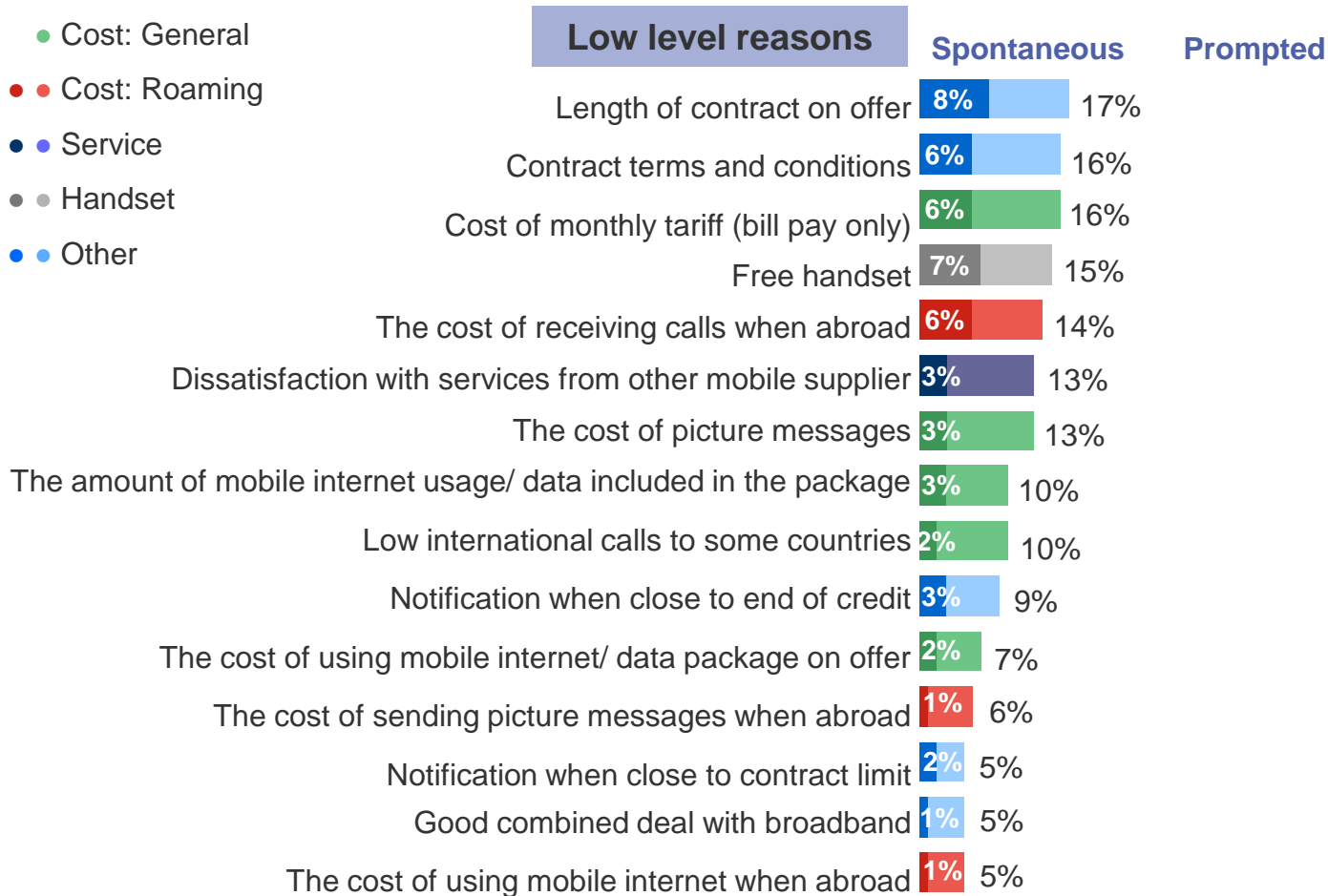


Friends and family were important for just over 30% of mobile owners, however, their impact is increased further when we consider the importance placed on same network considerations.

Low level reasons to choose a mobile phone network?

Q.4 Why did you choose [INSERT NAME FROM Q3] as your mobile phone network?

Q.5 At the time, which of the following aspects did you consider when you decided to go with [INSERT NAME FROM Q.3]? Please tell me 'Yes' or 'No' for each one.

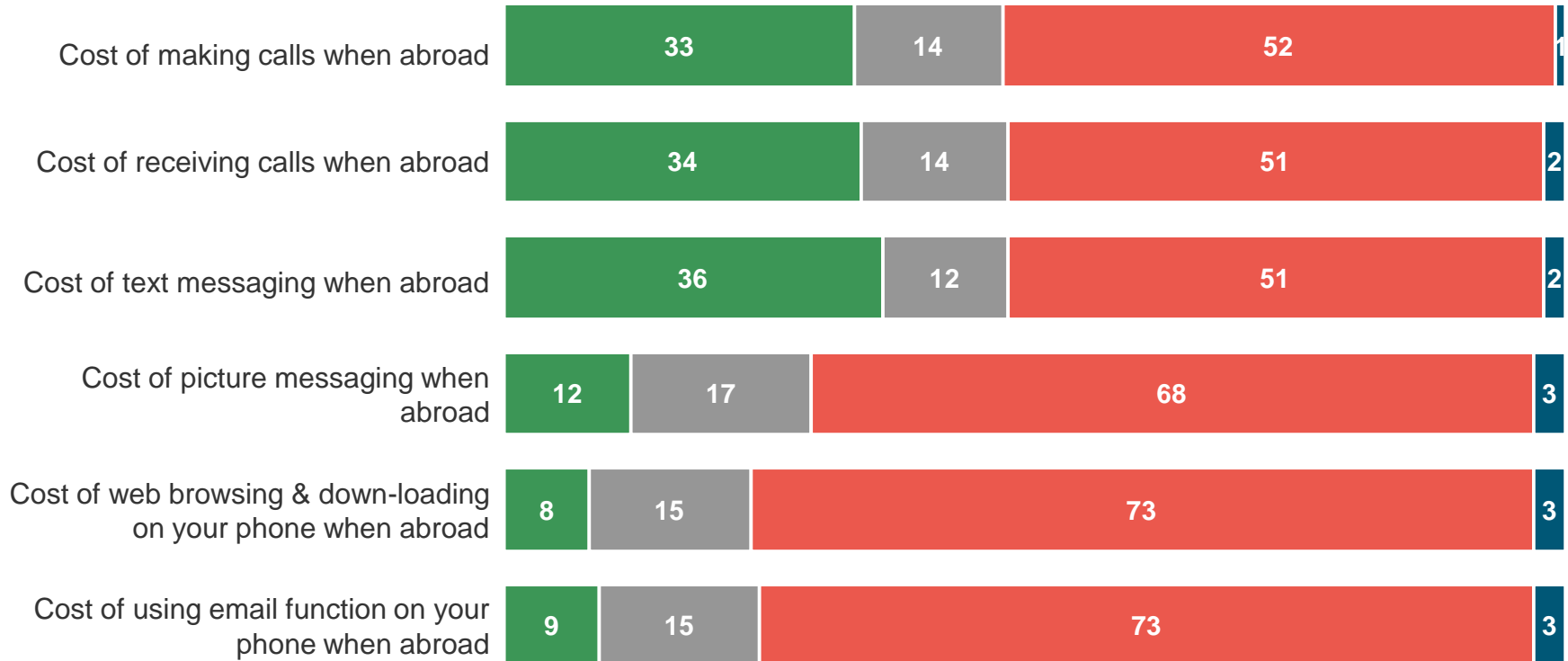


Roaming related and mobile internet considerations did not feature heavily for consumers.

Rating of importance of roaming rates to mobile phone owners

- Q.6a When you chose your network, how important to you was the cost of making calls when abroad?
- Q.6b When you chose your network, how important to you was the cost of receiving calls when abroad?
- Q.7a When you chose your network, how important to you was the cost of text messaging when abroad?
- Q.7b When you chose your network, how important to you was the cost of picture messaging when abroad?
- Q.8a When you chose your network, how important to you was the cost of browsing the Internet and downloading content on your phone when abroad?
- Q.8b When you chose your network, how important to you was cost of using the email function on your phone when abroad?

■ Important ■ Neither important nor unimportant ■ Unimportant ■ Don't know



While the cost of calls and text messages when abroad were important to at least 3 in 10 mobile phone owners, picture messaging and internet usage featured at a much lower when choosing network provider.

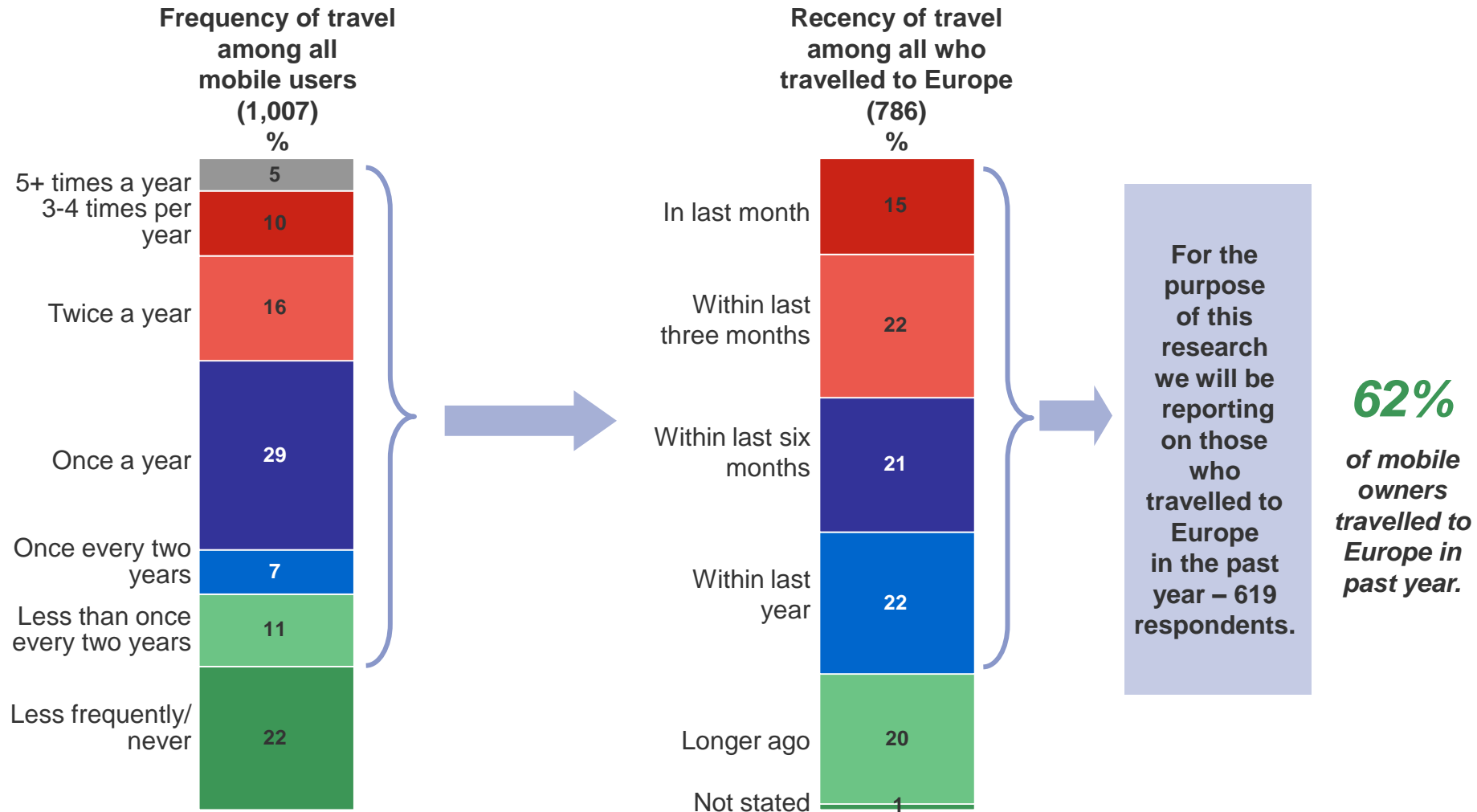


Travel Behaviour of Mobile Phone Owners

Travel details of mobile phone owners

Q.9a Roughly how many times a year do you travel for any reason, i.e. business and personal, to Europe, including Norway and Iceland.

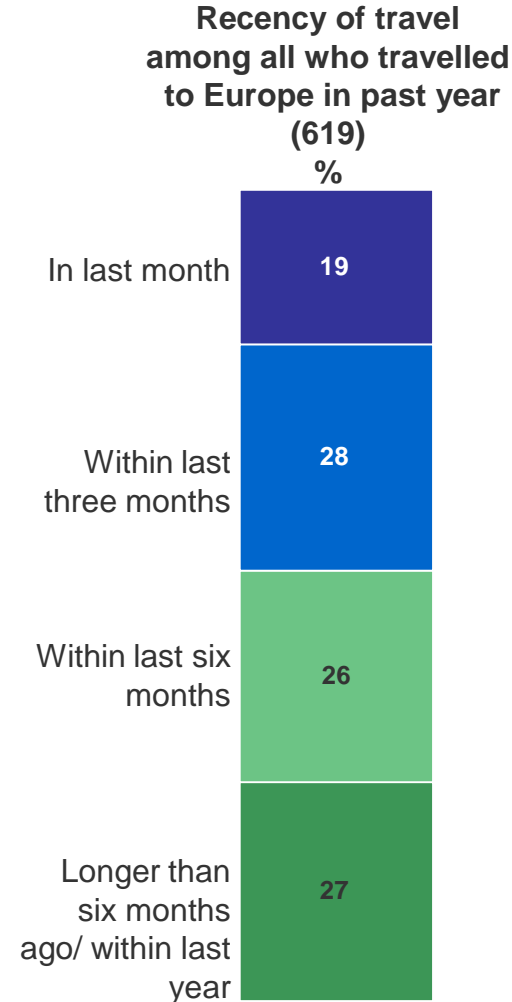
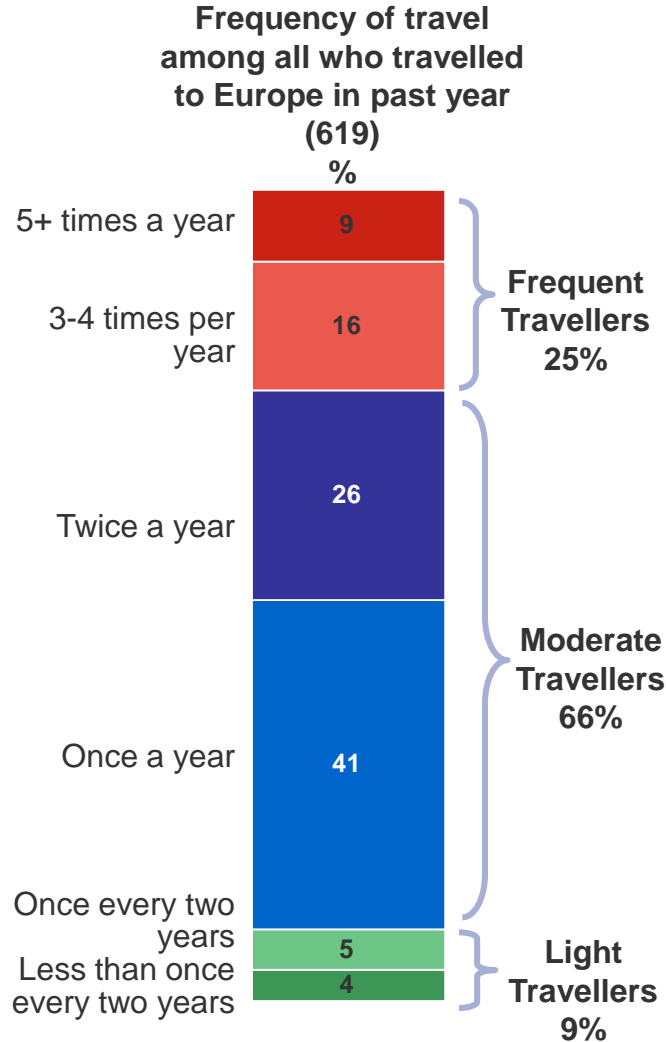
Q.10a Can you tell me how long ago you visited [INSERT COUNTRY FROM Q.9b]?



Travel behaviour of mobile phone owners who travelled to Europe in past year

Q.9a Roughly how many times a year do you travel for any reason, i.e. business and personal, to Europe, including Norway and Iceland.

Q.10a Can you tell me how long ago you visited [INSERT COUNTRY FROM Q.9b]?

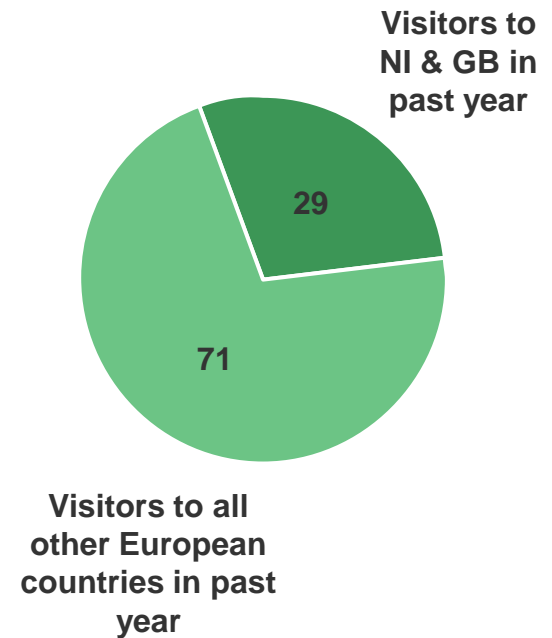


The majority of respondents can be classified as moderate travellers to Europe. Of these, 73% had travelled within the last 6 months.

Countries visited by those who travelled in the last year

Q.9b Looking at this list, which of these countries was the last European country that you visited?

	%		%
 Spain	31	 Lithuania	1
 Great Britain	25	 Malta	1
 France	9	 Belgium	1
 Portugal	8	 Sweden	1
 Italy	4	 Romania	1
 Northern Ireland	4	 Denmark	1
 Poland	2	 Bulgaria	*
 Germany	2	 Hungary	*
 Netherlands	2	 Slovenia	*
 Greece	2	 Latvia	*
 Czech Republic	1	 Finland	*
 Austria	1	 Estonia	*
 Cyprus	1	 Norway	*



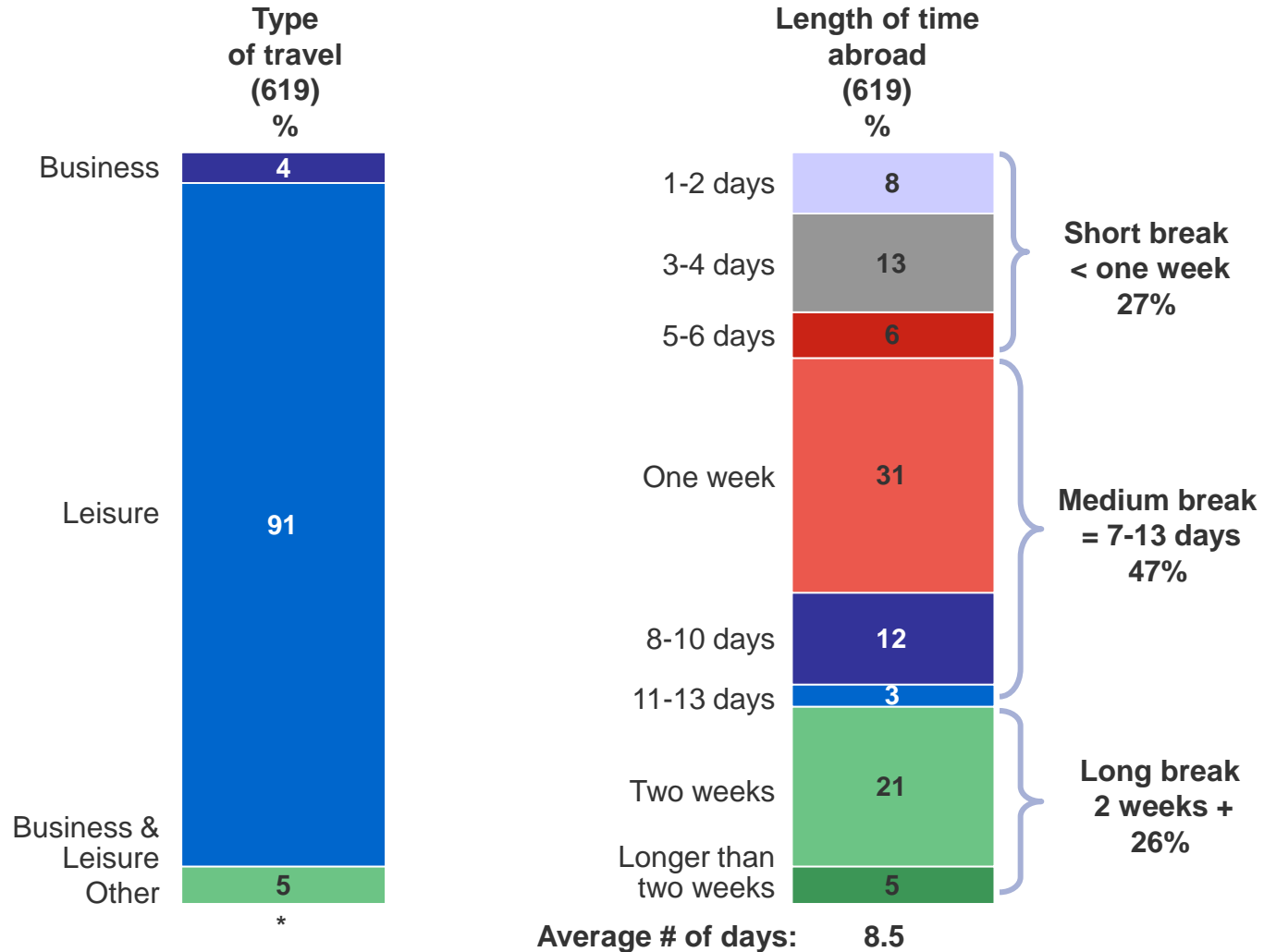
* Countries with no visitors not shown

Of those that travelled in the past year, the majority travelled to Spain (31%) while 29% travelled to Great Britain (including Northern Ireland).

Nature and length of trip to Europe among those who travelled in the last year

Q.10b And when you were in [INSERT COUNTRY FROM Q.9b], were you there for business or leisure purposes or both?

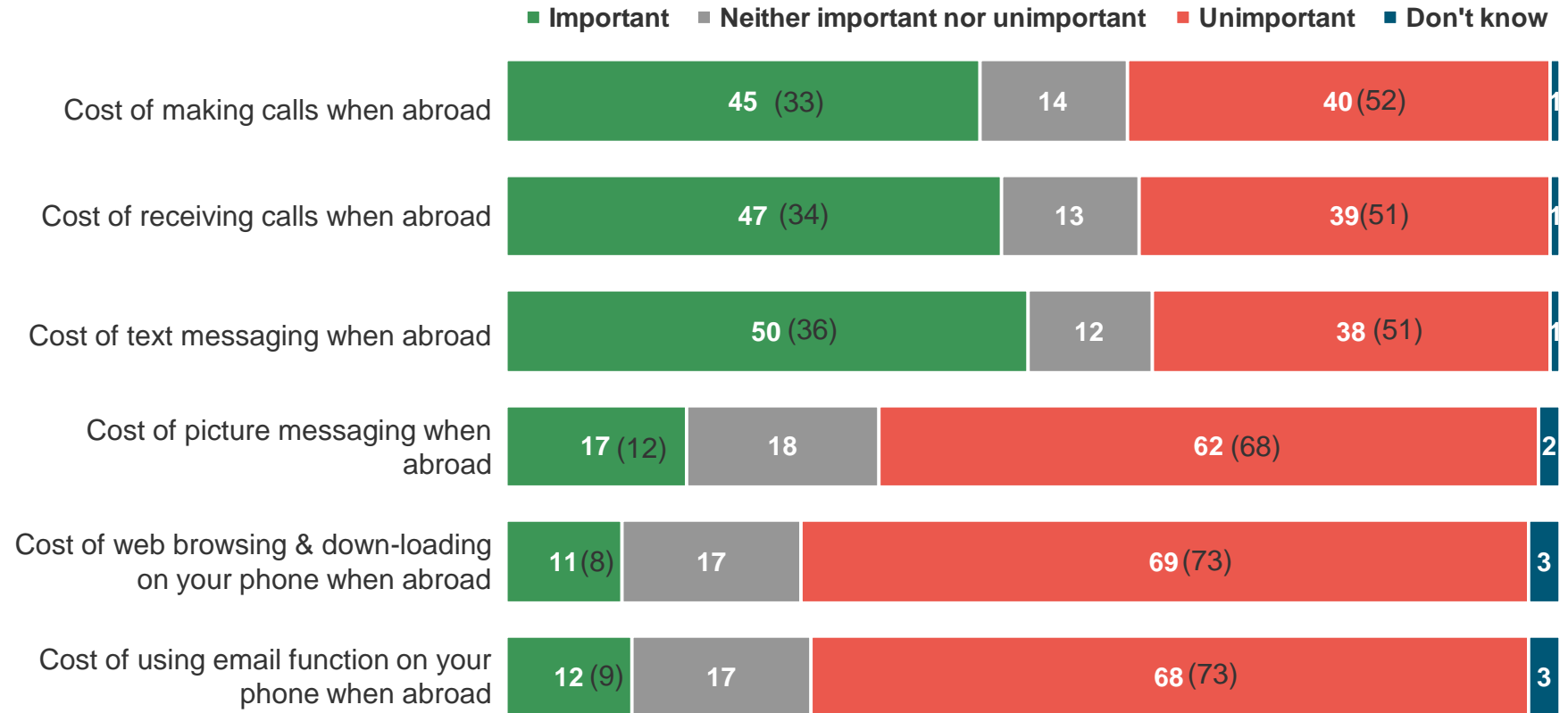
Q.10c And how long were you in [INSERT COUNTRY FROM Q.9b]?



Over 90% of respondents travelled to Europe for the purpose of leisure with the average length of time away being 8.5 days.

Rating of importance of roaming rates to mobile phone owners who have used their phone abroad

- Q.6a When you chose your network, how important to you was the cost of making calls when abroad?
- Q.6b When you chose your network, how important to you was the cost of receiving calls when abroad?
- Q.7a When you chose your network, how important to you was the cost of text messaging when abroad?
- Q.7b When you chose your network, how important to you was the cost of picture messaging when abroad?
- Q.8a When you chose your network, how important to you was the cost of browsing the Internet and downloading content on your phone when abroad?
- Q.8b When you chose your network, how important to you was cost of using the email function on your phone when abroad?

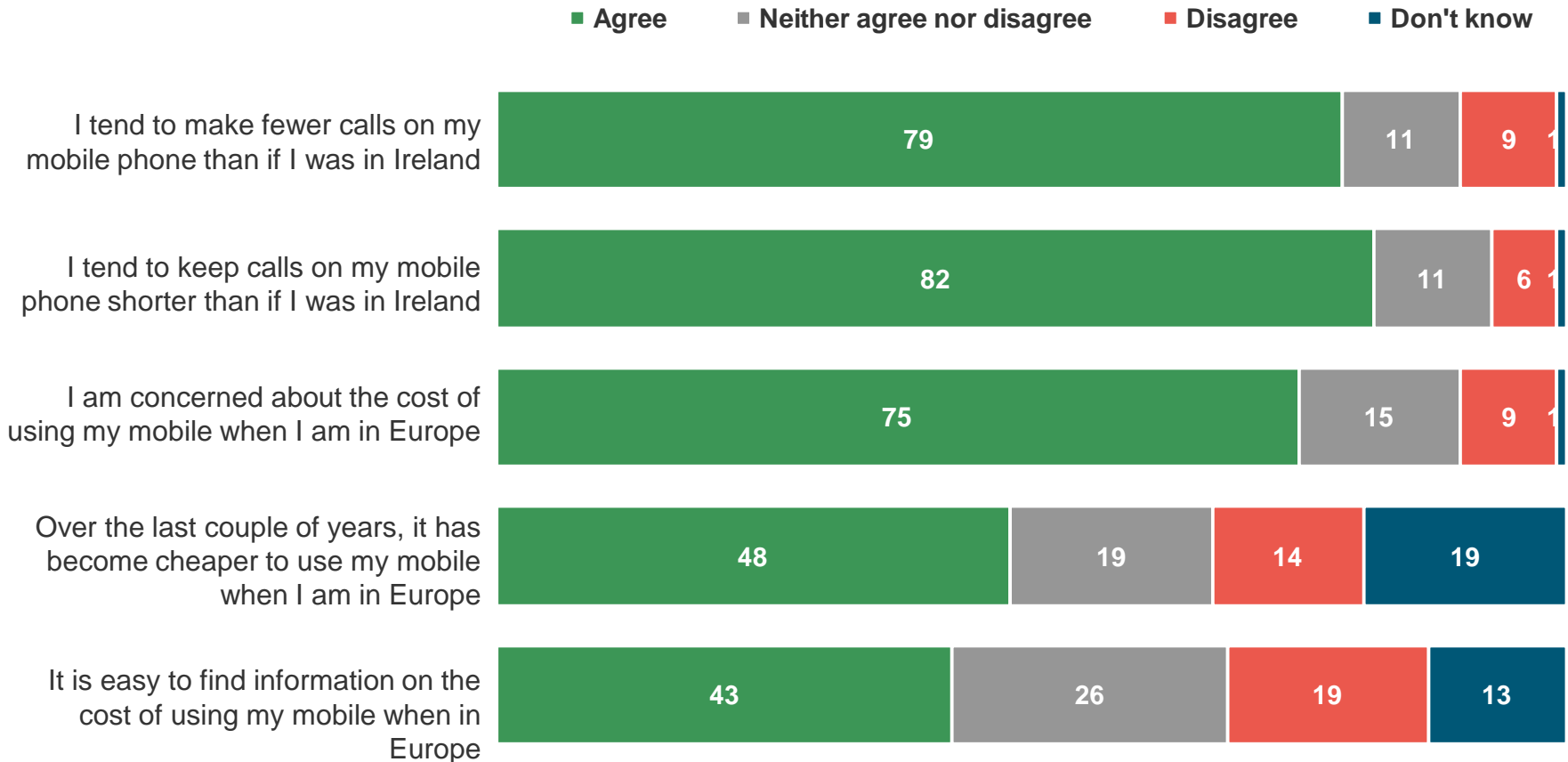


() = All mobile users

For those using roaming services, roaming related considerations are much higher with at least 4 in 10 giving consideration to the cost of calls and text messages when abroad.

Attitudes towards roaming among those who travelled to Europe in the last year

Q.32 Thinking about when you travel to Europe, please tell me the extent to which you agree or disagree with the following statements:

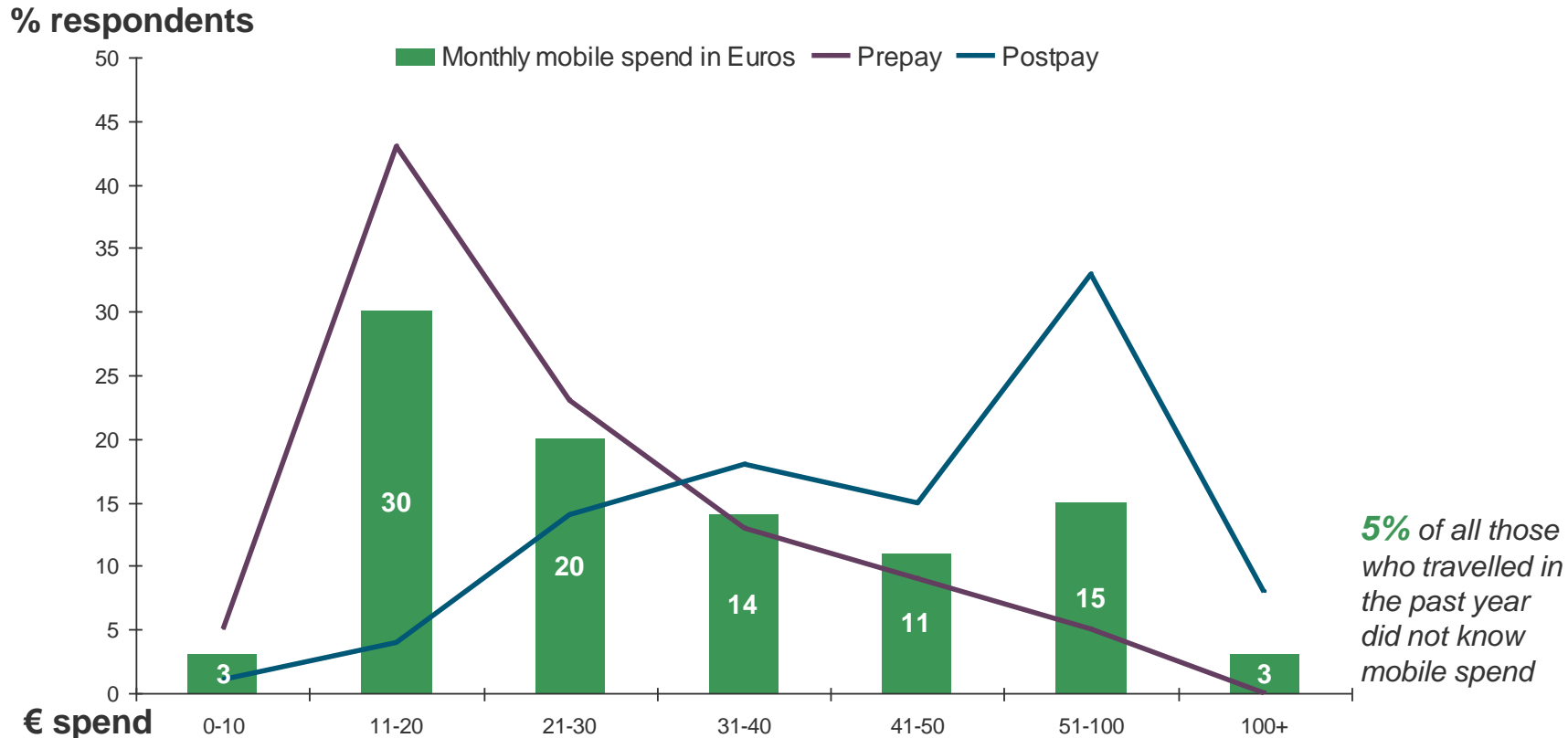


It is evident that the vast majority of people endeavour to curtail their phone usage when they travel to Europe. While almost half recognise that it has become cheaper to use their mobile when in Europe, the majority (57%) do not believe it is easy to find information about roaming costs.

Average monthly mobile spend among all those who travelled in the last year

Q.44 Approximately how much do you spend each month on your main mobile phone network? Please include the cost of VAT, your subscription, calls, text messaging, picture messaging, and Internet type services.

Average monthly mobile spend



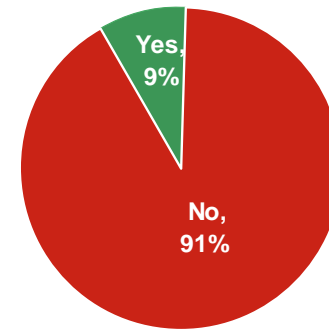
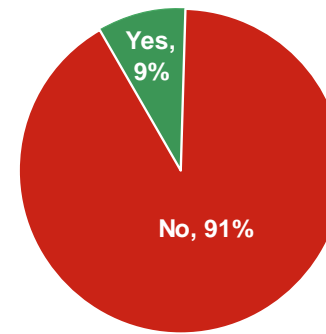
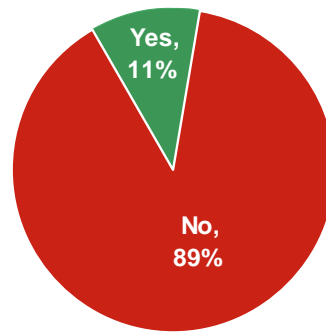
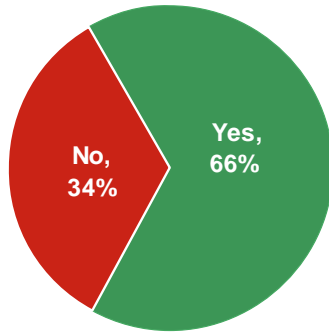
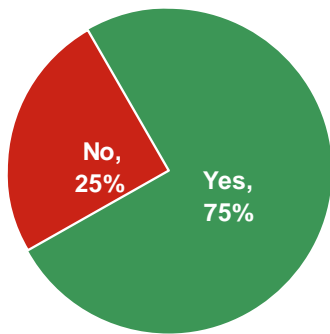
The average spend per month among all respondents who travelled in the past year is €35.13. This is lower for those with Prepay phones (€25.50) while those with Postpay phones spend substantially more (€53.75)



Roaming Behaviour When Last In Europe

Use of mobile phone when last in Europe

- Q.11 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone to make personal calls?
 Q.15 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone to make business calls?
 Q.19 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone for text messaging?
 Q.23 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone for picture messaging?
 Q.27 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone for the internet?



Text messaging

- The most popular form of communicating when abroad
- Prepay (72%)
- Billpay (83%)
- Smartphone users (74%)
- **14%** used only text messages when abroad

Personal calls

- The second most popular form of communicating when abroad
- Prepay (57%)
- Billpay (84%)
- Smartphone users (78%)
- **7%** used only personal calls when abroad

Business calls

- Not popular but majority (91%) of respondents travelled for leisure
- Prepay (4%)
- Billpay (23%)
- Smartphone users (27%)

Picture messaging

- Used by only 9% of respondents but not necessarily an 'everyday' phone function
- Prepay (8%)
- Billpay (11%)
- Smartphone users (14%)

Mobile internet

- Used by only 9% respondents but Smartphone usage is limited also
- Prepay (6%)
- Billpay (15%)
- Smartphone users (34%)

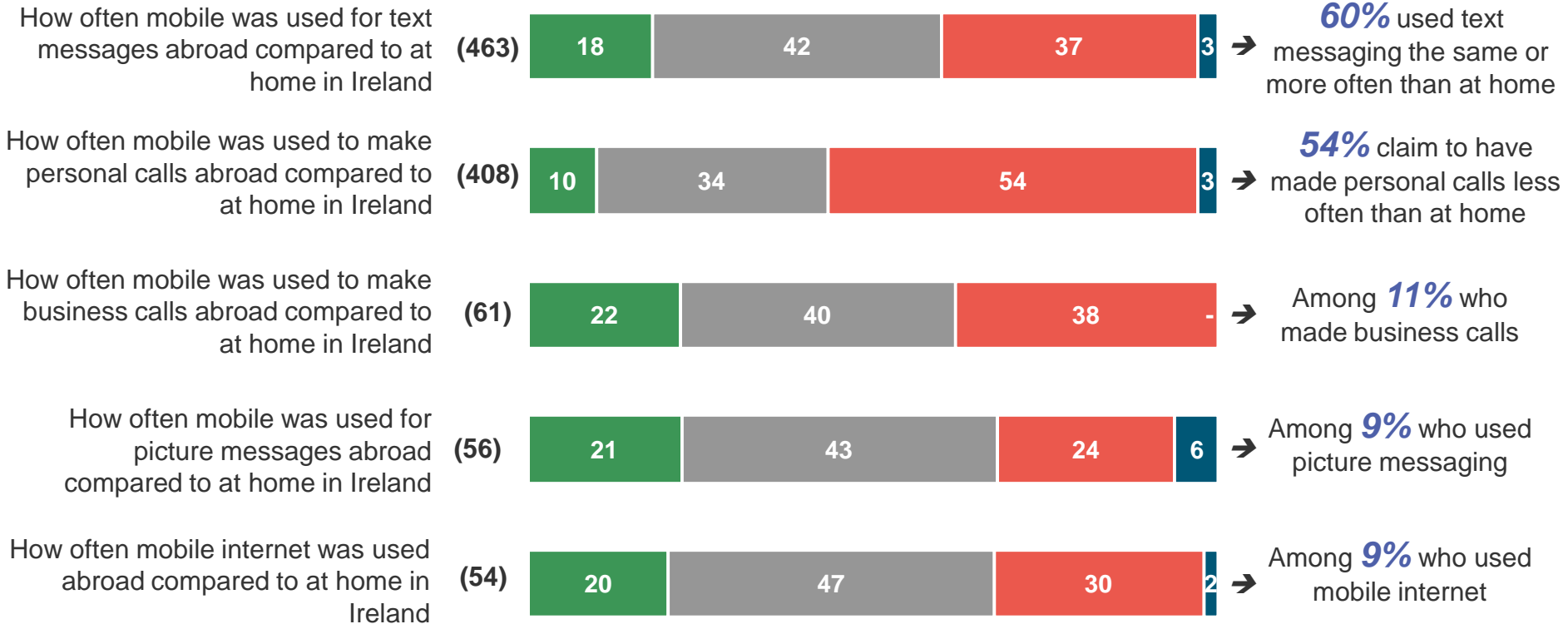
87% of mobile owners used any of these functions when last in Europe.

Base: All mobile phone users who travelled to a European country in the past year (619) Ipsos MRBI/10-038943/ComReg Mobile Roaming/November 2010

Use of mobile when last in Europe compared to when at home

- Q.13 Thinking about when you were in [INSERT COUNTRY], how often did you use your mobile phone to make personal calls compared to when you are at home in Ireland?
- Q.17 Thinking about when you were in [INSERT COUNTRY], how often did you use your mobile phone to make business calls compared to when you are at home in Ireland?
- Q.21 Thinking about when you were in [INSERT COUNTRY], how often did you use your mobile phone for text messaging compared to when you are at home in Ireland?
- Q.25 Thinking about when you were in [INSERT COUNTRY], how often did you use your mobile phone for picture messaging compared to when you are at home in Ireland?
- Q.29 Thinking about when you were in [INSERT COUNTRY], how often did you use the internet on your mobile phone compared to when you are at home in Ireland?

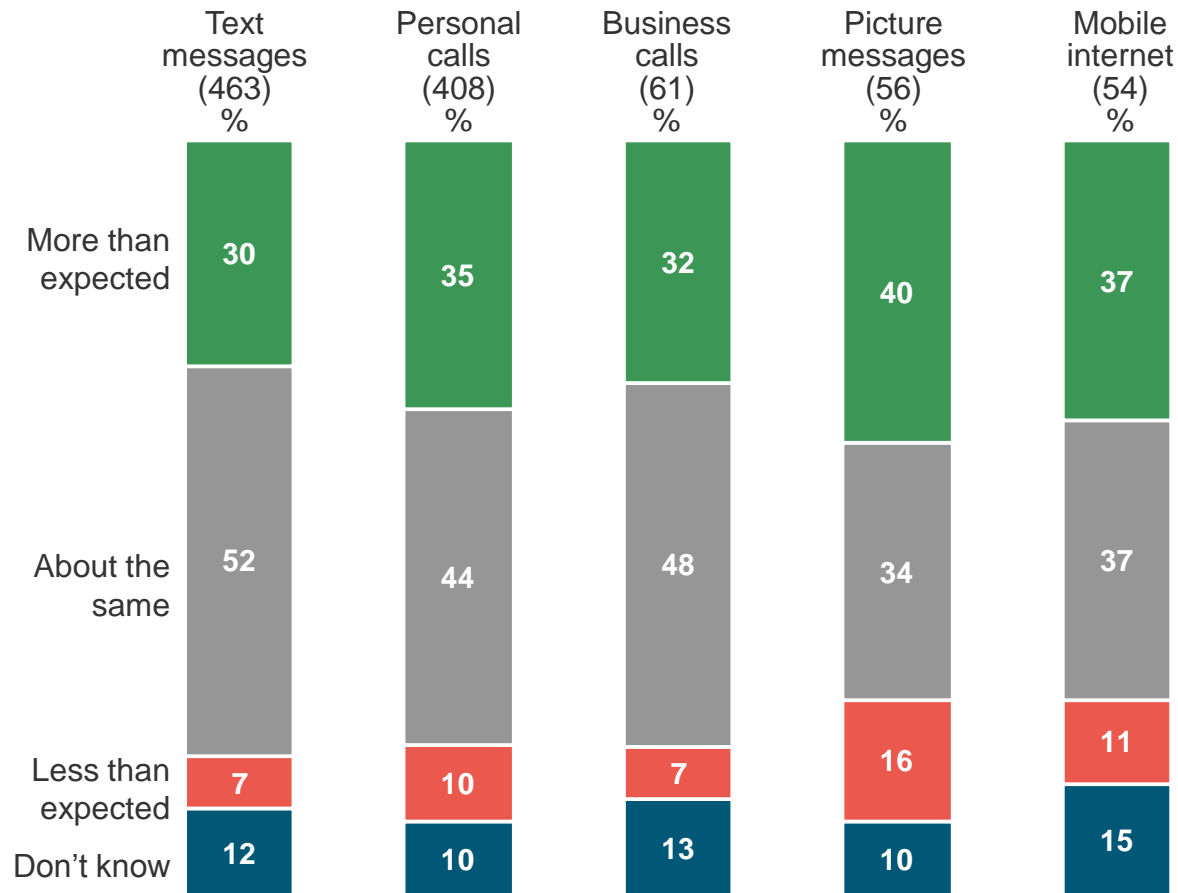
■ More often ■ About the same ■ Less often ■ Don't know



While the majority of those who travelled in past year used the text messaging function in a similar manner to at home in Ireland. The biggest shift in behaviour was with regard to making personal calls when abroad.

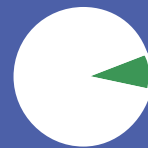
Costs associated with using mobile phone when last in Europe

- Q.12 How did the actual cost of the personal calls compare to the cost that you expected?
- Q.16 How did the actual cost of the business calls compare to the cost that you expected?
- Q.20 How did the actual cost of text messaging compare to the cost that you expected?
- Q.24 How did the actual cost of picture messaging compare to the cost that you expected?
- Q.28 How did the actual cost of internet on your mobile compare to the cost that you expected?

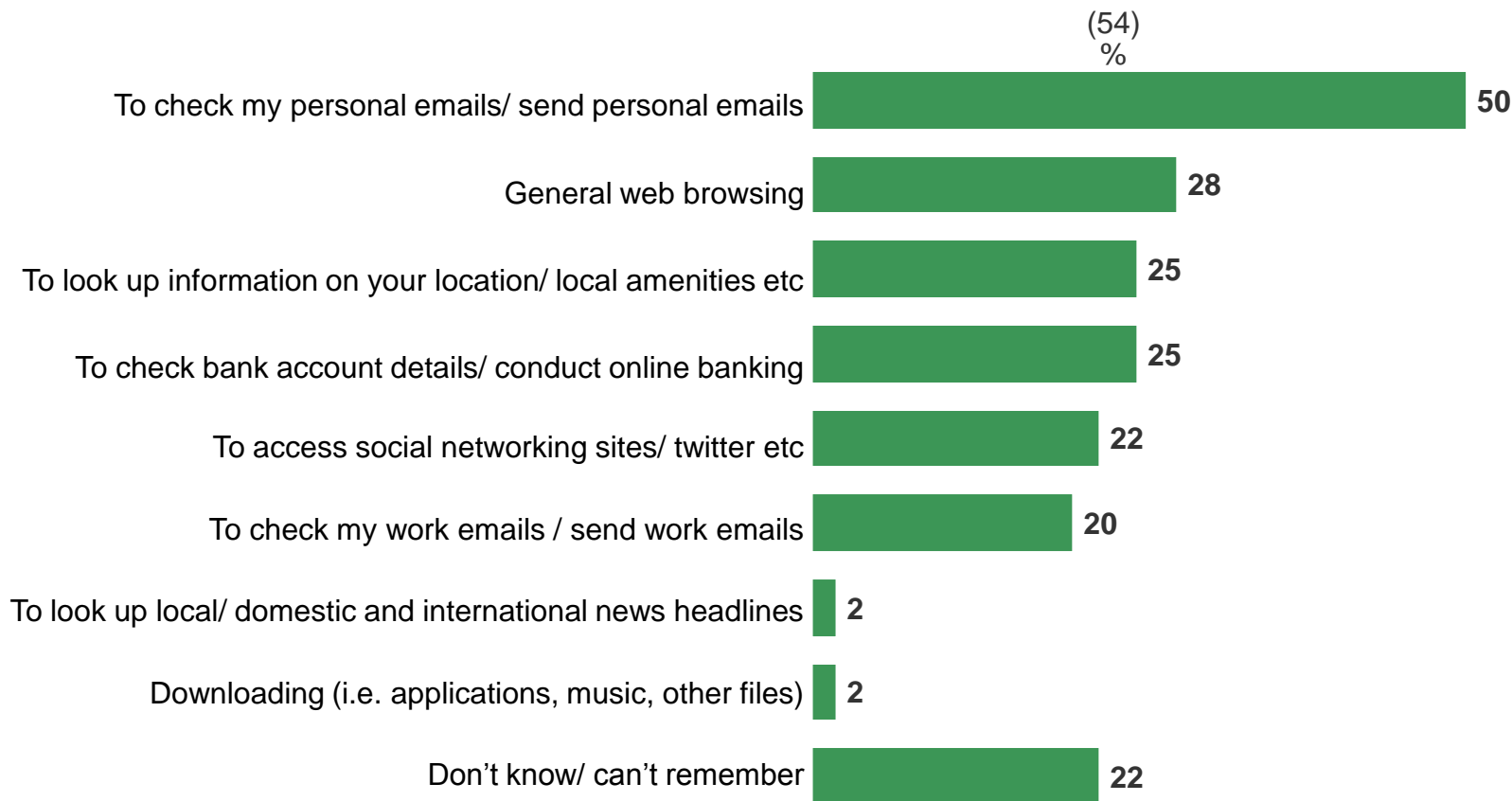


More than 30% of respondents across each of the mobile functions, believed the cost of using that function was greater than they had expected.

Reasons for using mobile internet when last in Europe



Q.27 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone for the internet? By internet we mean any internet usage from emailing, to web browsing, to accessing sites and downloading files and applications etc.



Those using the internet on their phone are doing so primarily for personal and leisure reasons.



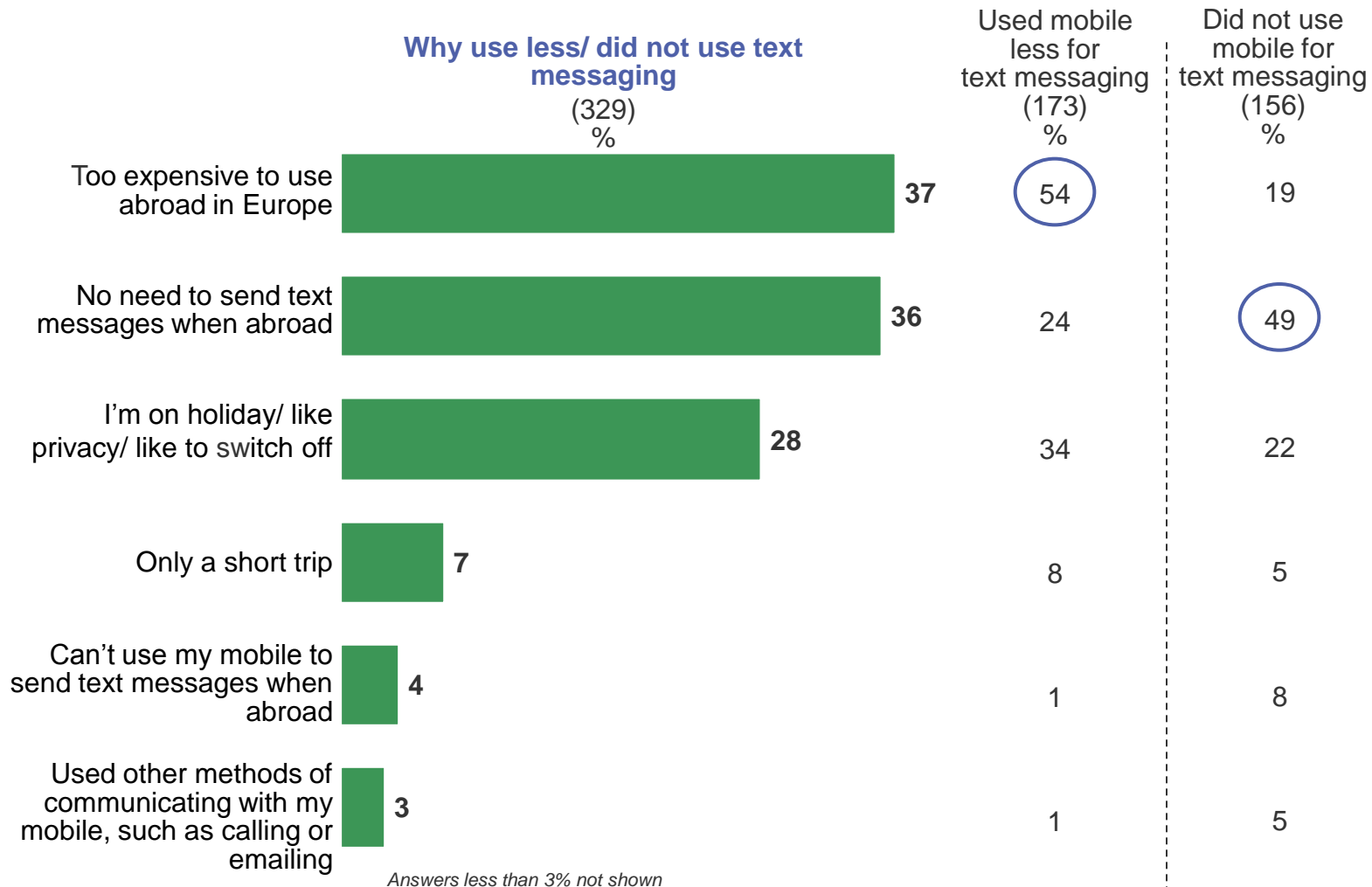
Reasons For Not Using Or For Reducing Phone Usage When Roaming In Europe

Reasons for not sending text messages when last in Europe



Q.19 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone for text messaging?

Q.22 Why [did you use your mobile phone less] / [did you not use your mobile phone] for text messaging when you were in [INSERT COUNTRY]?



37% who used text messaging used it less

25% did not use text messaging at all

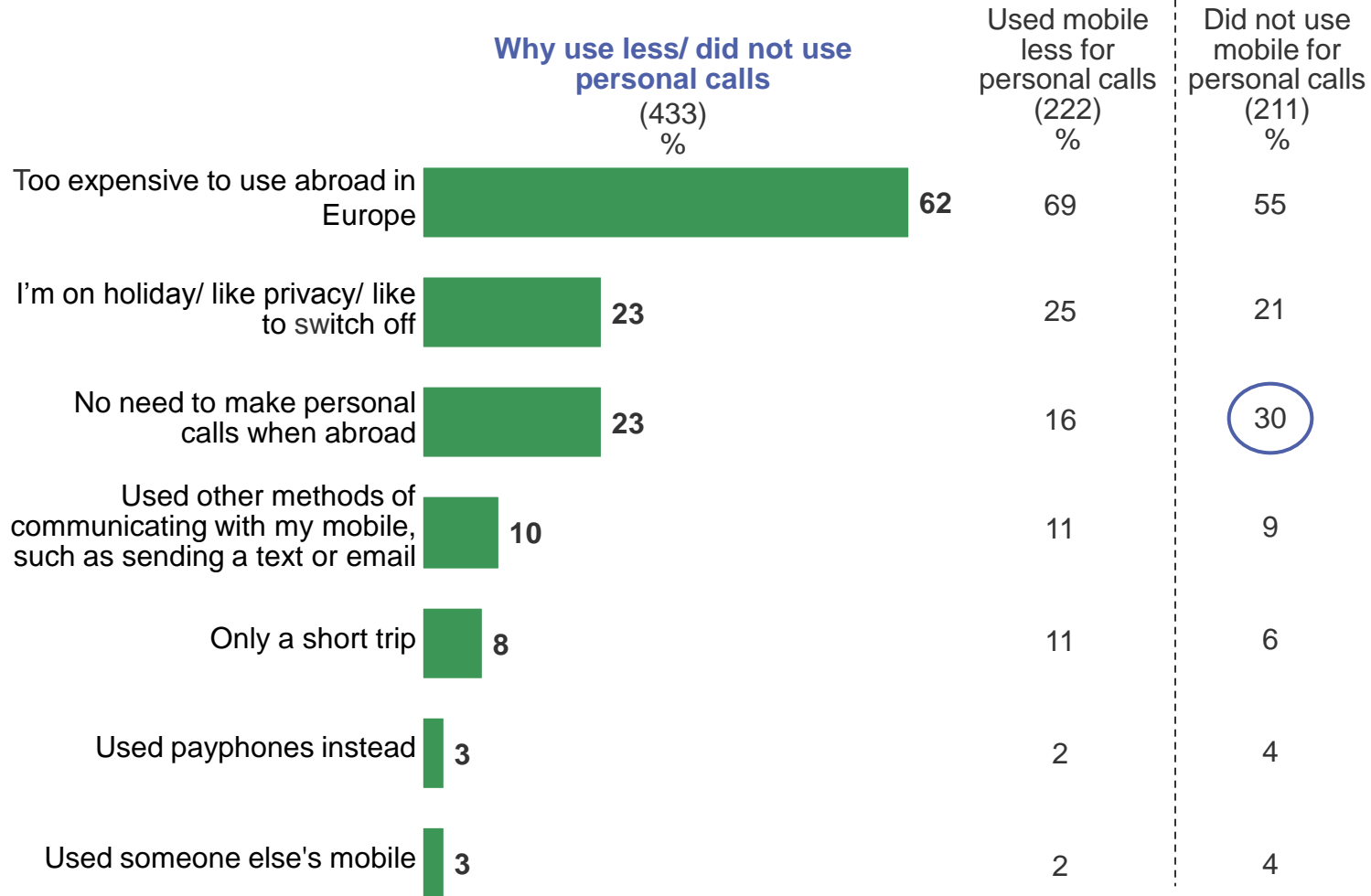
Cost was mentioned as the main reason for reducing use of or not using text messages. However, almost the same proportion of people stated that there was no need to send text messages when they were abroad.

Reasons for not making personal calls when last in Europe



Q.11 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone to make personal calls?

Q.14 Why [did you use your mobile phone less] / [did you not use your mobile phone] to make personal calls when you were in [INSERT COUNTRY]?



Answers less than 3% not shown

54% who made personal calls made them less
34% did not make personal calls at all

The expense associated with making personal calls was deemed to be a considerable barrier.

Reasons for not making business calls when last in Europe

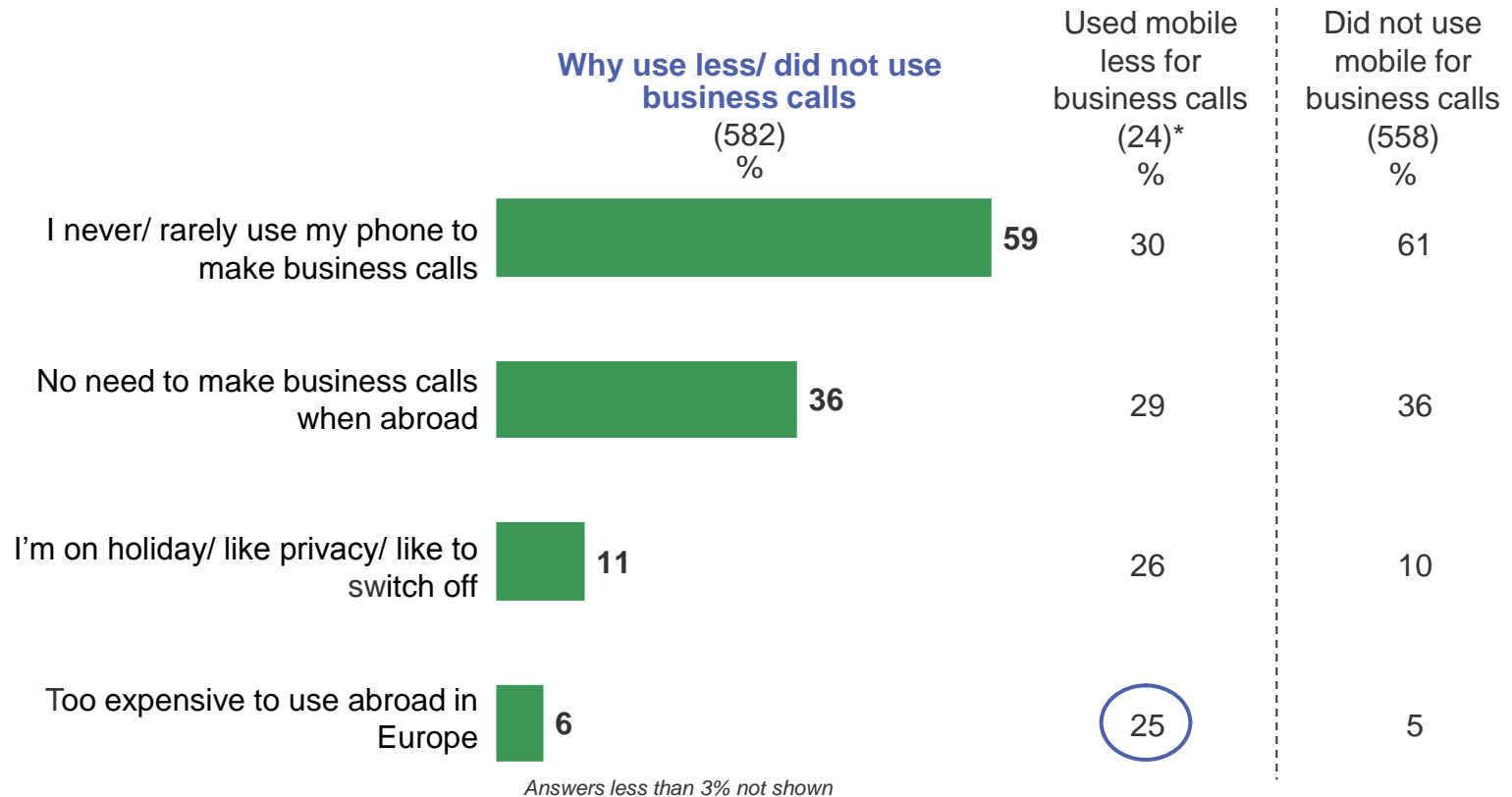


Q.15 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone to make business calls?

Q.18 Why [did you use your mobile phone less] / [did you not use your mobile phone] to make business calls when you were in [INSERT COUNTRY]?

38% who made business calls made them less

89% did not make business calls at all



The 'leisure' aspect of the trip abroad was a substantial influencer in the low level of business calls made. However, this needs to be considered in the context of the 'at home' behaviour of respondents, also needs to be taken into account, with 60% claiming that they rarely/ never use their phone for business calls when at home.

Reasons for not sending picture messages when last in Europe

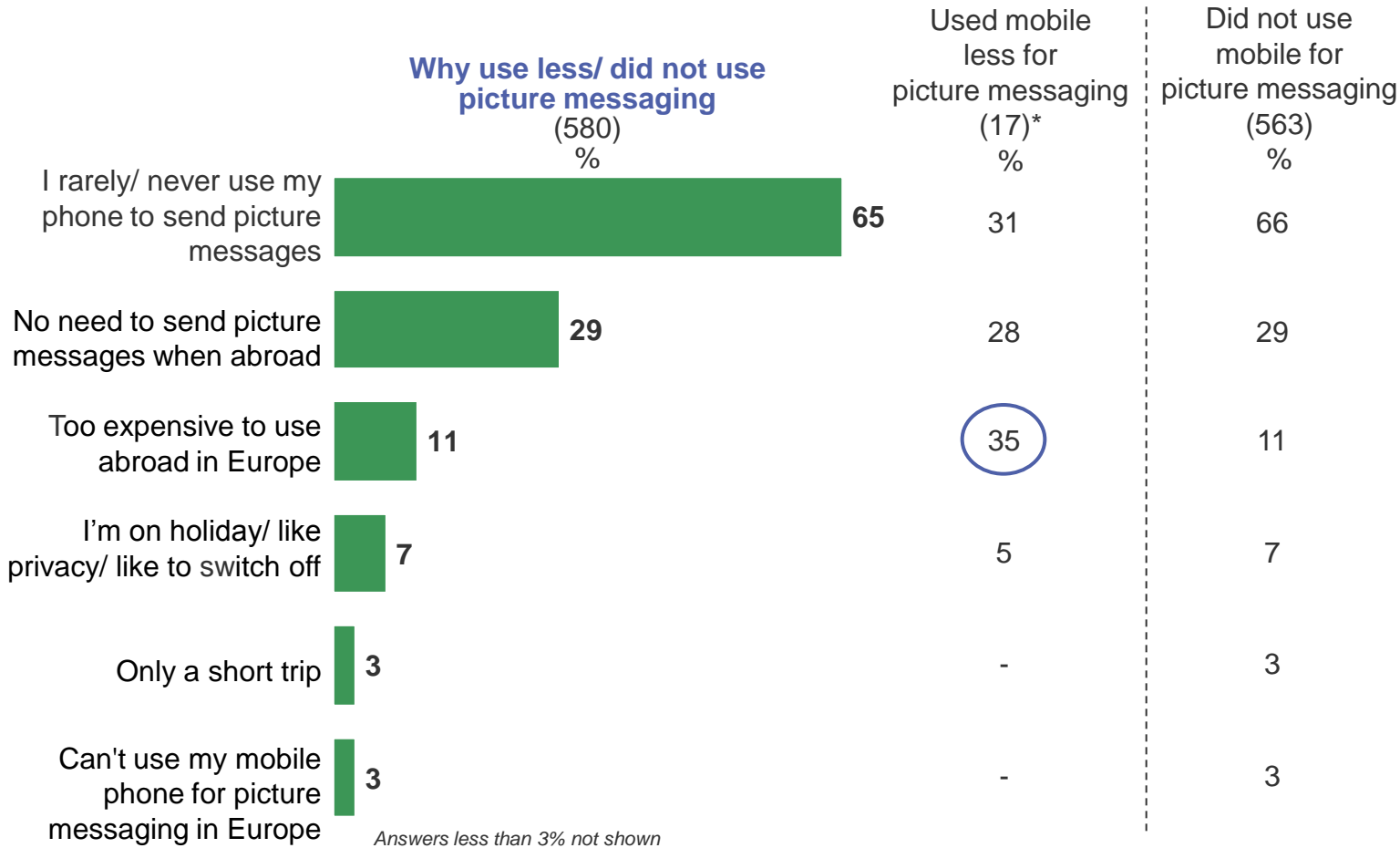


Q.23 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone for picture messaging?

Q.26 Why [did you use your mobile phone less] / [did you not use your mobile phone] for picture messaging when you were in [INSERT COUNTRY]?

24% who used MMS used it less

91% did not make send MMS at all



A general lack of interaction with the picture messaging function was given as the main reason not to use or use this function less when abroad compared to at home.

Reasons for not using mobile internet when last in Europe



Q.27 Thinking about your most recent trip to [INSERT COUNTRY], did you use your mobile phone for the internet? By internet we mean any internet usage from emailing, to web browsing, to accessing sites and downloading files and applications etc.

Q.31 Why [did you use your mobile phone less] / [did you not use your mobile phone] for mobile internet when you were in [INSERT COUNTRY]?

30% who used mobile internet used it less

91% did not use mobile internet at all

Why use less/ did not use mobile internet (583) %	Used mobile less for mobile internet (18)* %	Did not use mobile for mobile internet (565) %
I rarely/ never use the internet on my phone 74	5	76
No need use mobile internet when abroad 17	16	17
Too expensive to use abroad in Europe 16	32	15
I'm on holiday/ like privacy/ like to switch off 8	10	7
Used other methods of communicating with my mobile 7	19	6
Only a short trip 5	8	5
Used email on local computer 5	5	5
Can't use mobile internet on my phone when in Europe 4	-	4
Used email on laptop I brought with me 4	8	4

The majority of respondents tend not to normally use the internet on their phone and this heavily outweighs any consideration of cost as a reason for not using mobile internet when abroad.



Base: All who used their mobile phone less (18)* or not at all (565) for mobile internet when abroad

Actions to reduce roaming costs – current & potential

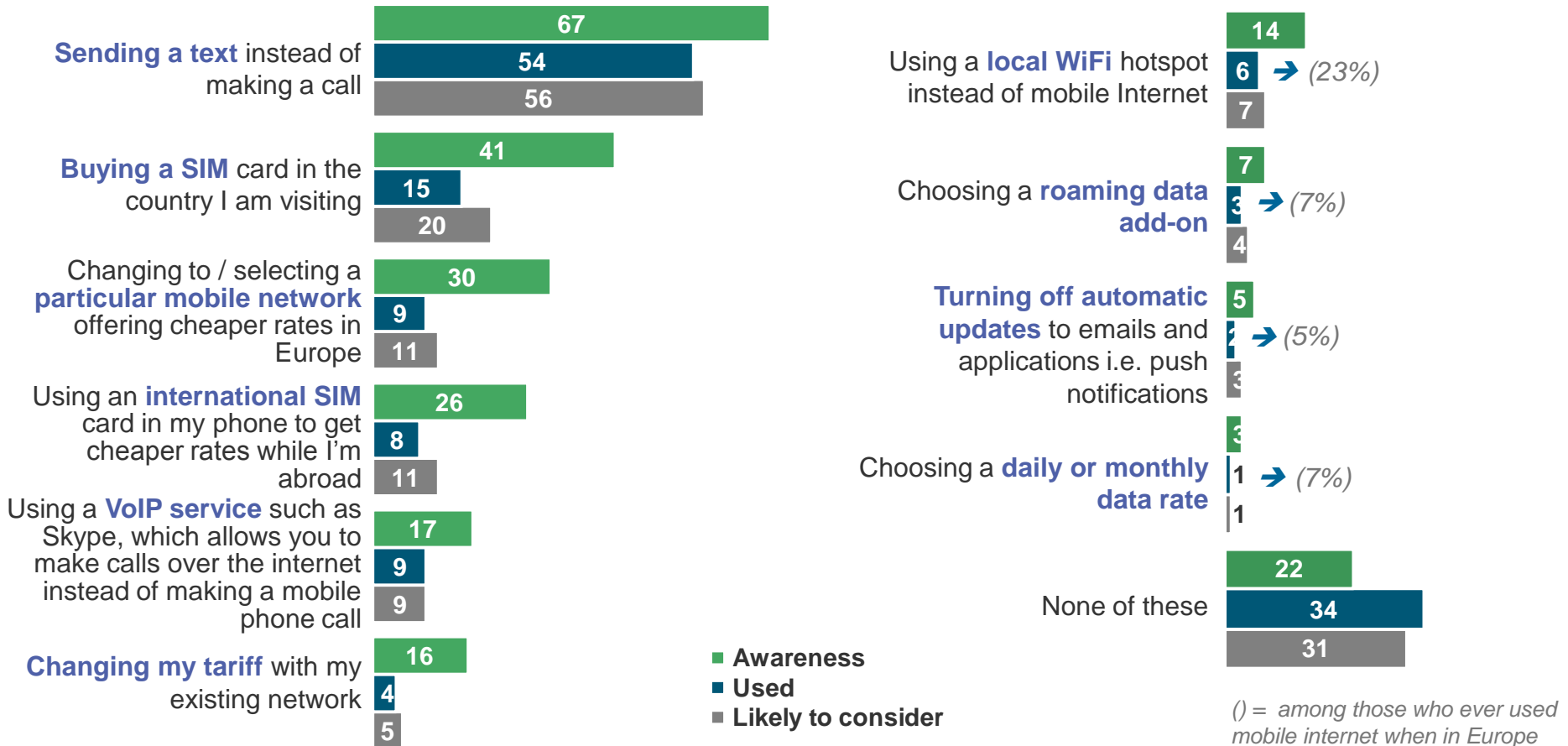
Q.37 Can you tell me whether or not you were already aware of any of these ways of reducing the cost of using your mobile when in Europe?

Q.38 Which, if any, of these methods have you used to reduce the cost of using your mobile when you are in Europe?

Q.39 Which, if any, of these methods are you likely to consider using next time or using again when you are in Europe?

Actions to reduce roaming costs

(619)
%

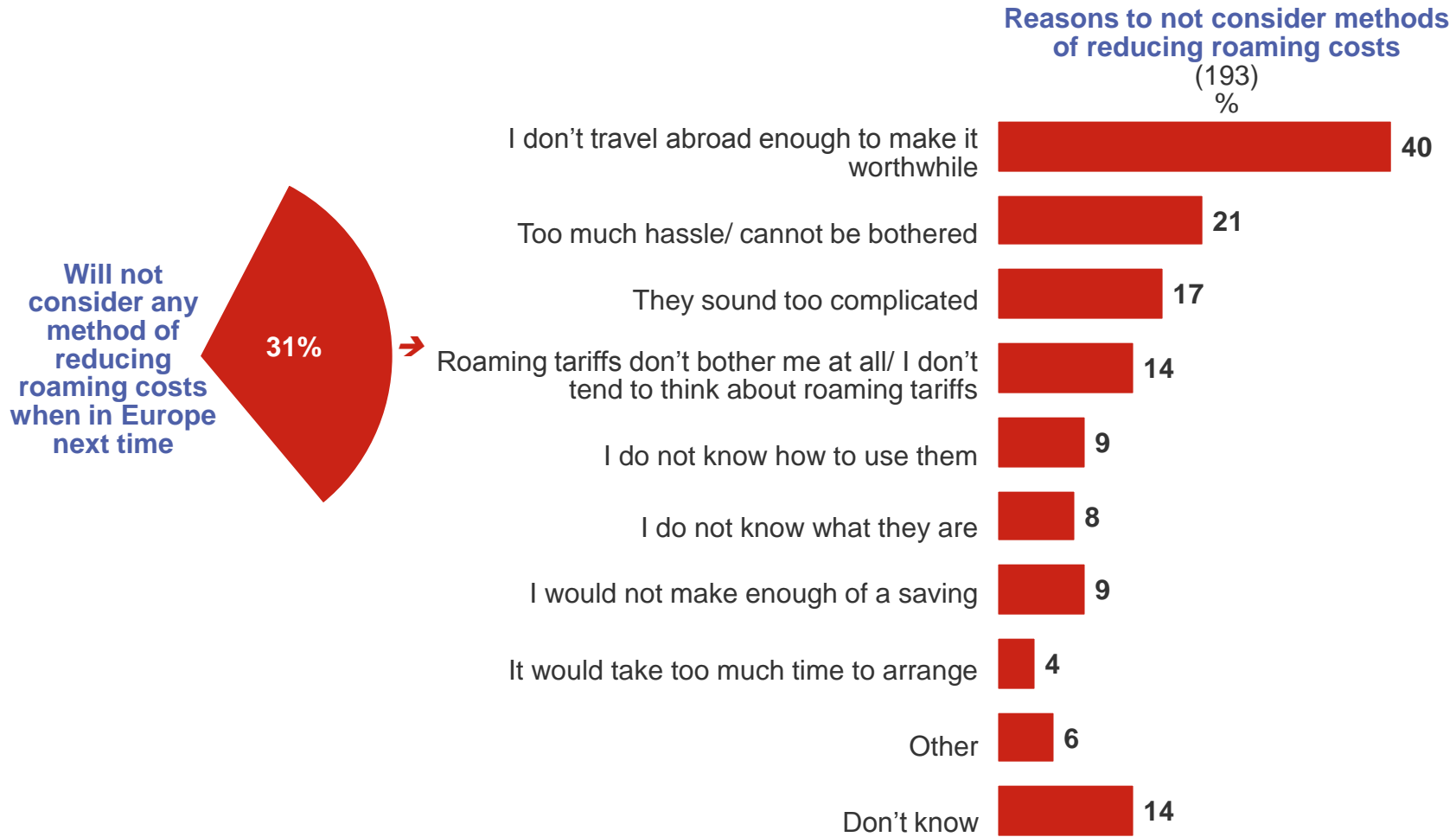


Among those who have travelled to Europe in the past year, texting is the main way to reduce costs.

Reasons for not considering ways to reduce costs

Q.39 Which, if any, of these methods are you likely to consider using next time or using again when you are in Europe?

Q.40 Overall, why would you not consider using any of these ways of reducing your cost?



Infrequent travellers do not feel the need to purposefully reduce their roaming costs while many others feel these methods are too much hassle and complicated.

The background of the slide features two circular 'no left turn' road signs mounted on a utility pole. Each sign consists of a red circle with a diagonal slash over a black arrow pointing left. The signs are positioned vertically, one above the other. The utility pole and some wires are visible on the left side of the image. The overall background is a light, textured yellowish-white.

Levels of 'Roaming' Understanding

Claimed awareness and understanding of roaming costs

Q.34a Are you aware of the Eurotariff caps for calls and text messages when roaming in Europe?

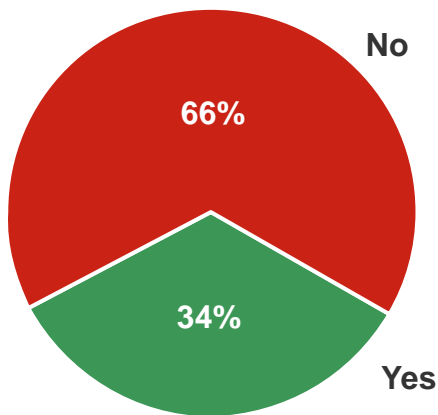
Q.34b Did you know that the costs of using your mobile phone while travelling by sea or air is considerably higher than the Eurotariff? In other words, it is different to the tariff that applies when you are in your foreign destination?

Q.34c Do you think that receiving a text message while roaming in Europe is free or is there some charge applied?

Awareness of Eurotariff caps for calls and text messages

Lowest awareness among:

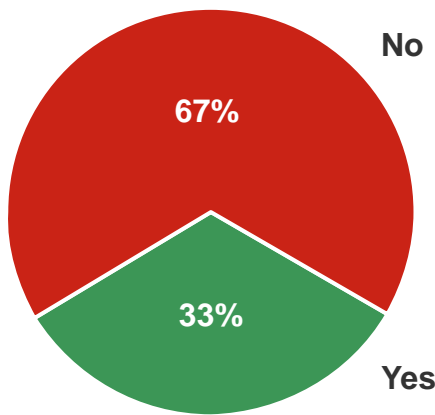
- 15-24yr olds (79%)
- Prepay phone holders (74%)
- Light travellers - travel once a year (72%) or less than once every two years (85%)
- Those who travelled to NI & GB when last in Europe (73%)



Understanding where Eurotariff applies

Lowest understanding among:

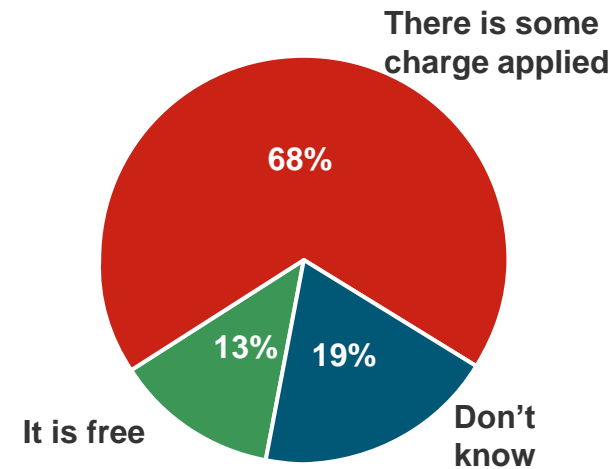
- 15-24yr olds (82%)
- Pre-pay phone holders (74%)
- Light travellers - (73% who travel once a year)
- Those who spend less than €30 per month



Charges for receiving text messages when abroad

Misunderstanding highest among:

- AB (78%)
- 45-54 yr olds (75%)
- Postpay phone holders (74%)



Overall, there is a significant lack of understanding and awareness about roaming charges. The legacy of being charged for text messages also remains.

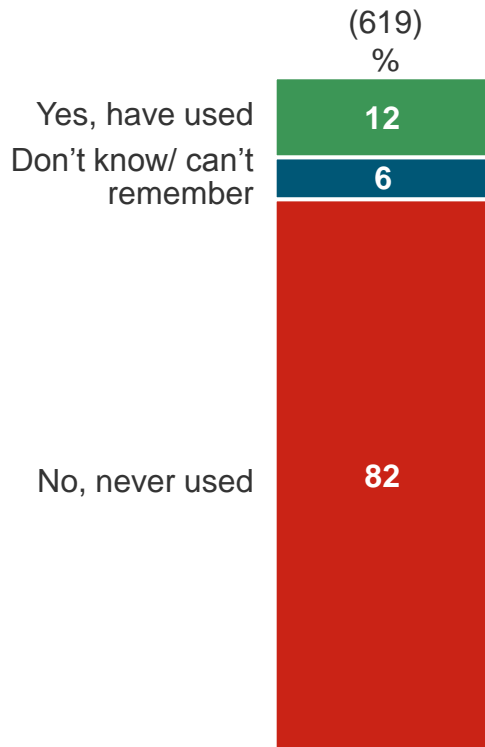
Use and understanding of mobile internet

Q.35a Have you ever used the Internet on your mobile phone when roaming in Europe, Iceland or Norway?

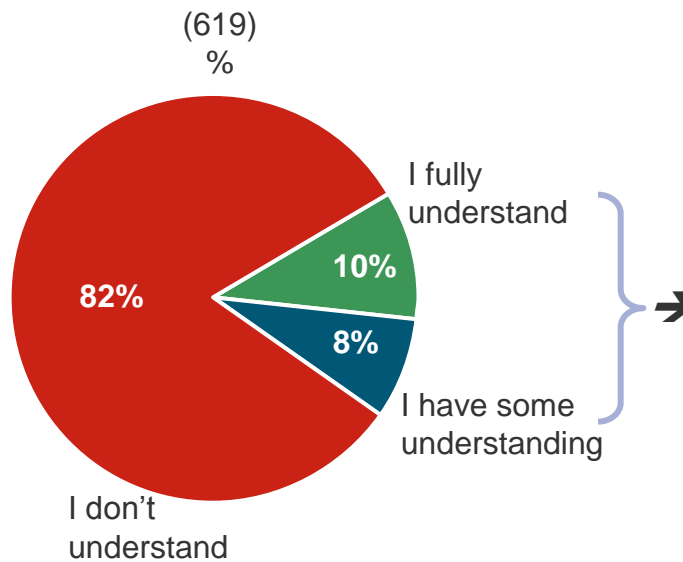
Q.35b Do you fully understand that the charges for using the Internet while roaming in Europe are volume based, for example charges are calculated per megabyte of data used, or do you just have some understanding of Internet roaming charges or are you not aware how they are calculated at all?

Q.35c Can you tell me roughly how much data, in megabytes (MB), is needed when: i) checking emails; ii) web browsing; iii) downloading documents.

Ever used internet on mobile phone when roaming in Europe



Level of understanding of how internet roaming charges are calculated



But;

61% (52%) of these unable to provide estimate for checking emails

68% (62%) of these unable to outline how many megabytes required for web browsing

70% (59%) of these unable to specify data required for downloading documents

() = among those who ever used mobile internet when in Europe

There is a very low level of understanding about how data roaming charges are calculated and about the data required for various roaming functions, even among those who have ever roamed in Europe, although awareness of data charges generally may also be low.

Recall of network provider advice on roaming costs

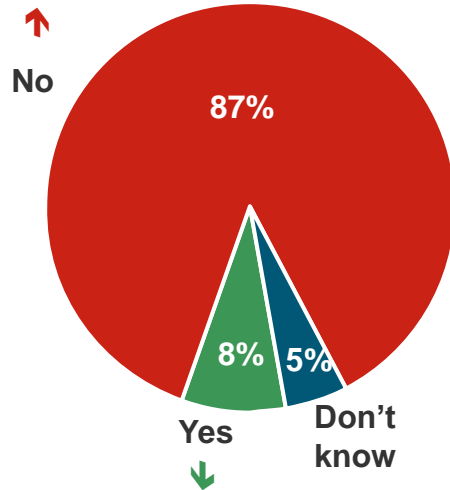
Q.36a Has your operator ever given you advice on how much capacity there is per megabyte of data?

Q.36b Has your operator ever contacted you or informed you of the risk of automatic and uncontrolled data roaming?

Q.36c Has your operator ever advised you on how to control automatic data roaming?

Advice on capacity per megabyte of data

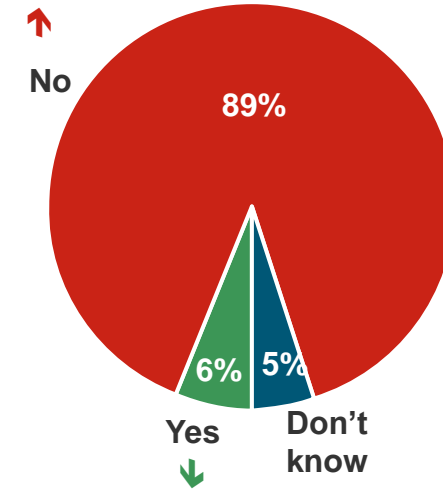
Those who ever roamed in Europe (56%)



Those who ever roamed in Europe (38%)

Information on risk of uncontrolled data roaming

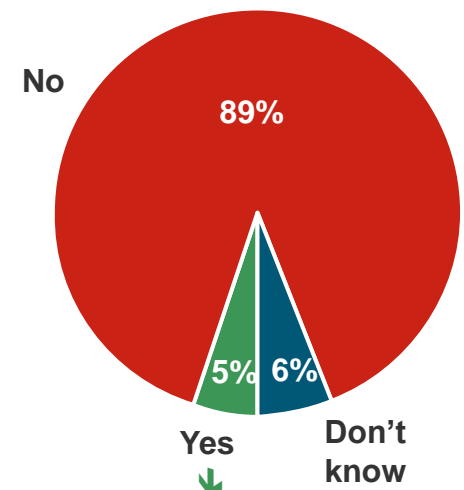
Those who ever roamed in Europe (67%)



Those who ever roamed in Europe (27%)

Advice on how to control automatic data roaming

Those who ever roamed in Europe (66%)



Those who ever roamed in Europe (25%)

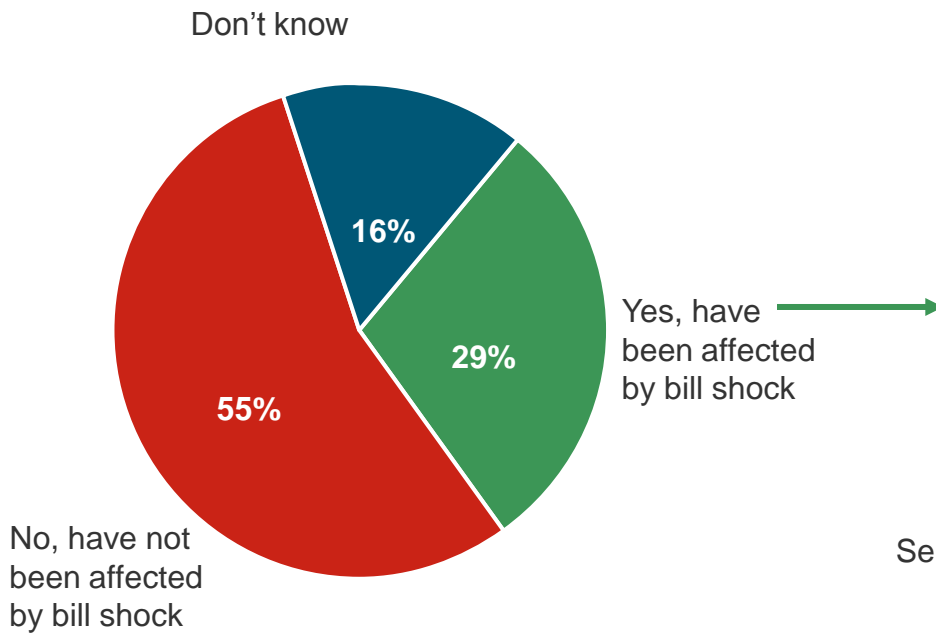
Almost 9 in 10 do not recall being contacted by their network provider about roaming capacity or data roaming risks and controls. However, given that the majority claim not to have used this facility when abroad, this may be indicative of their mobile usage.

Incidence of Bill Shock

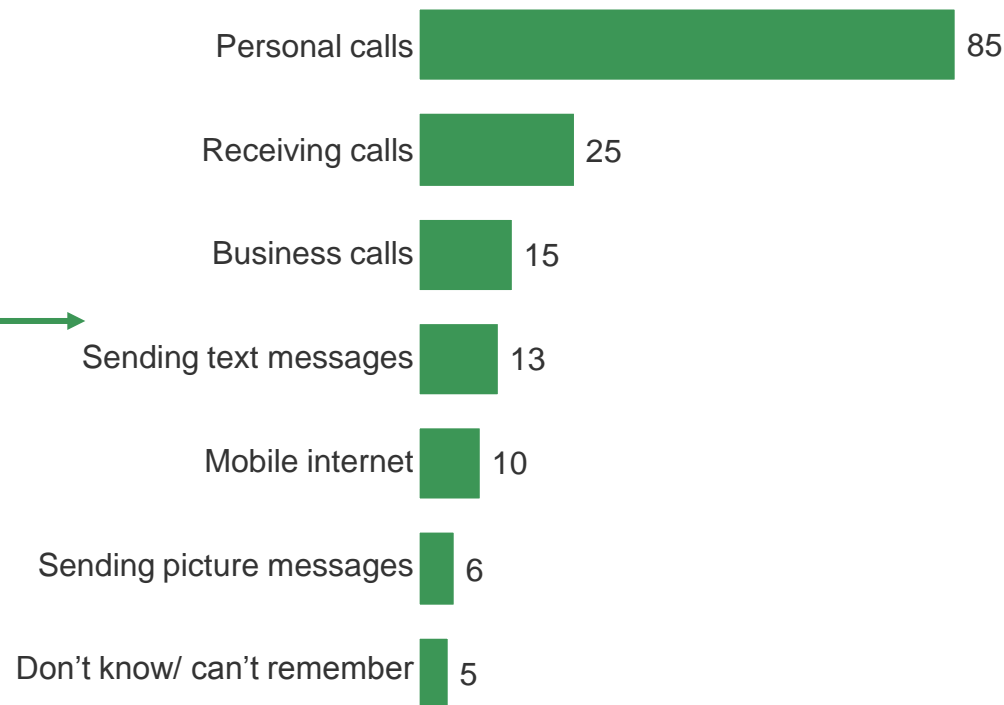
Q.33a Have you ever been affected by roaming bill shock, that is, an unexpectedly high bill after you have used your phone when abroad in a European country?

Q.33b What type of phone usage caused this high bill to occur?

Incidence of bill shock among all Bill Pay customers (238)



Phone usage that caused bill shock to occur (71%)

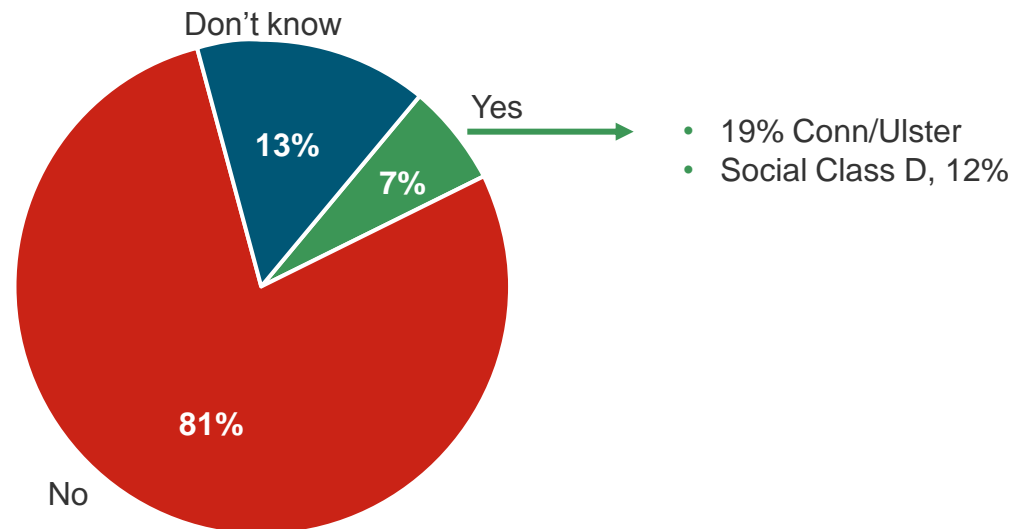


Almost 30% of those with bill phones have experienced some bill shock, caused primarily by personal calls.

Accidental Roaming

Q.43 In the past 12 months have you have been charged roaming rates on your mobile phone because your signal has been picked up by a network in Northern Ireland even though you weren't in Northern Ireland?

Incidence of accidental roaming among all who travelled to Europe in past year (619)

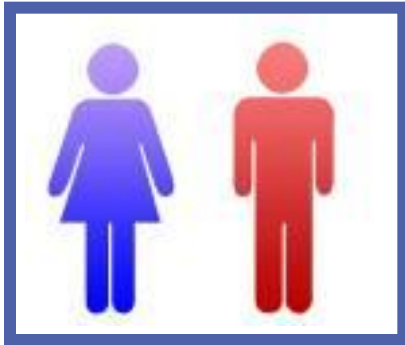


A small percentage of those who travelled abroad in the past year claim to have been affected by accidental roaming in the past 12 months.

13:15	MPD	186	Palma	Mallorca
13:40	BA	507	London/Heathrow	
13:45	TP	438	Paris/Orly	
13:55	TP	772	Bilbao	
14:00	TP	1627	Madeira	
14:00	AF	3171	Bordeaux	
14:05	EZY	3756	Paris/Ch de G	
14:10	TK	1760	Istanbul/Ata	
14:15	TP	576	Frankfurt	
14:15	LH	4541	Munich	
14:20	TP	660		

Conclusions

A typical roaming customer



Males and females, aged between 25-44 yrs...



...travelling approximately twice a year, mainly to GB or Spain....



....for the purposes of leisure...



...for an average of 8.5 days...



... so tend to reduce usage of their mobiles overall.



They have noticed *some* reduction in roaming charges.....



... but continue to feel that costs are too high across all mobile phone functionalities



Have low levels of understanding of data roaming and are.....

...predominately using text messaging on their mobiles when in Europe.



Conclusions I

- Mobile phone owners have not historically placed much emphasis on roaming or data related considerations when choosing their mobile phone operator.
- 62% of mobile owners have travelled to Europe in the past year.
- Among mobile owners who travelled to Europe in the past year, 87% used their phone for at least one purpose (personal calls, text messages, SMS/MMS, mobile internet).
 - However, there is a conscious effort being made by mobile owners to reduce their mobile usage when abroad by keeping phone calls shorter (83%) or making fewer calls (79%).
 - 75% of those who travelled to Europe in the past year asserted that they were conscious of the cost of using their mobile when in Europe.
 - That said, 48% agree that it has become cheaper to use their mobile phone when in Europe.
- Text messages and personal calls are the most popular phone usage and while the majority tend to use text messages to a similar extent to at home, behaviour in relation to personal calls is adapted downwards.

Conclusions II

- The experience of those who used their mobile phone abroad indicates that at least one in three found the cost to be more than they had expected. However, the majority found costs to be in line or better than they expected.
- Reducing mobile usage in terms of text messages and personal calls is attributed primarily to the fact that these are expensive. However, many also state that they have less need to communicate when on holidays.
 - In terms of business calls, picture messages and mobile internet, the fact that mobile owners tend not to use these functions on a regular basis is the main reason why these functions are used less when abroad.
- The key method that mobile owners use to reduce their roaming costs is by sending text messages. Roamers are aware of other methods but the hassle/ complication associated with using these discourages adoption.
- In terms of general awareness about Eurotariff caps, applications and charges, mobile owners display a relatively low level of understanding of these issues.
- Influenced by low levels of mobile internet usage (12% have ever roamed), mobile owners also display low levels of comprehension related to internet roaming charges.

Thank you

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