European Commission

The end of roaming charges within the EU

Flash Eurobarometer 454

METHODOLOGY

- *The survey was conducted via telephone interviews*
- *Fieldwork: 28 – 29 August 2017*
- *Population: General population aged 15+*
- *Coverage: EU28*
- *Number of interviews: 26,574*

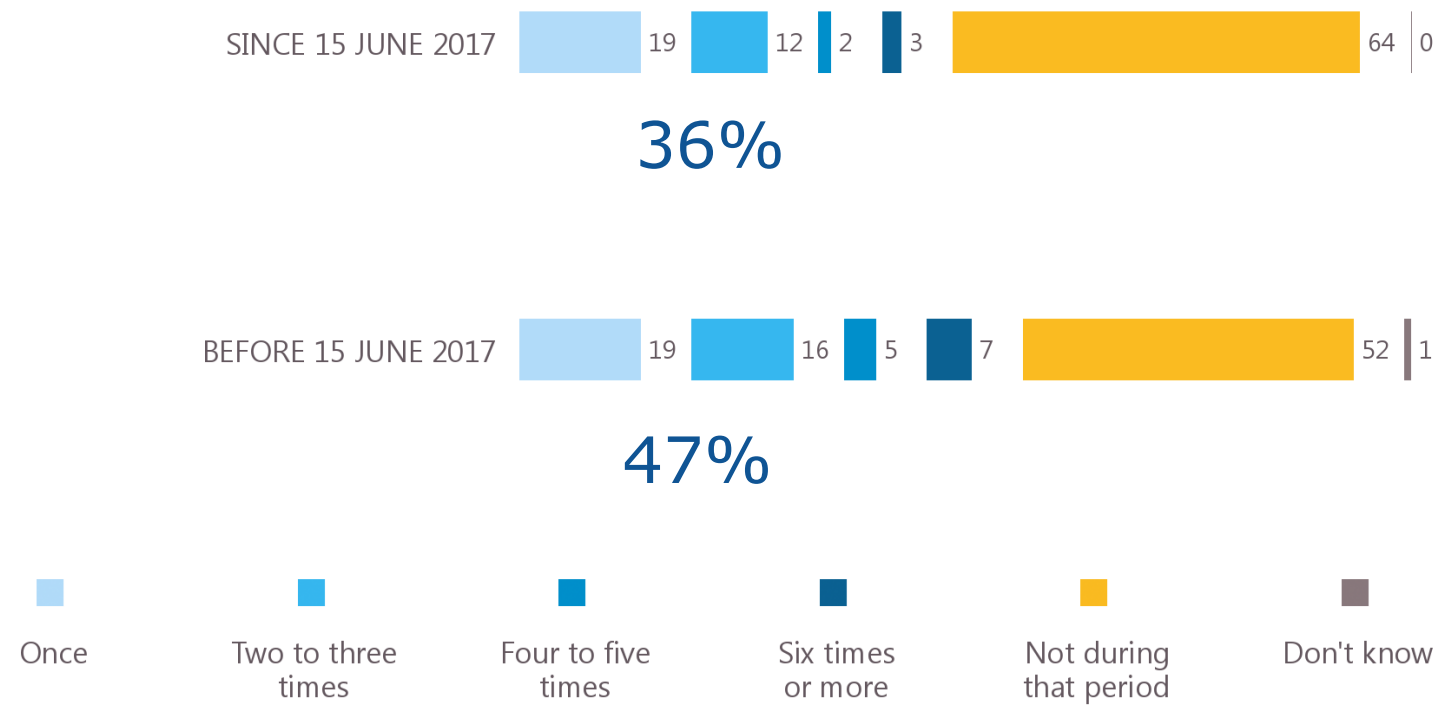
European Commission

I. TRAVELLING IN THE EU IN THE LAST 12 MONTHS

European Commission

More than a third of EU respondents travelled abroad in the EU since 15 June 2017

D9 In the last twelve months, how often have you travelled to another European Union country...?
(% - EU)



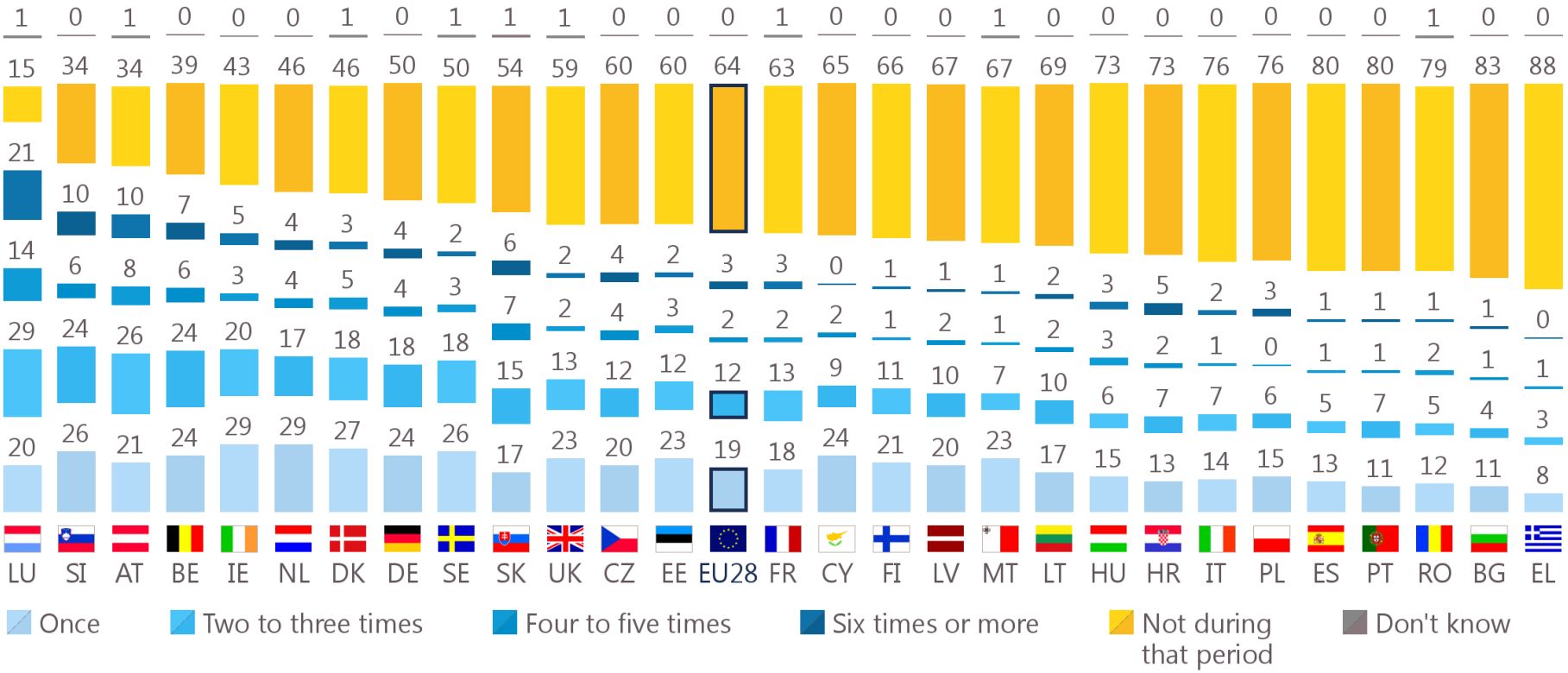
Base: All Respondents (N=26,574)

European Commission

There are large differences between countries in travelling habits (84% Luxembourg – 12% Greece)

D9.1 In the last twelve months, how often have you travelled to another European Union country...?

Since 15 June 2017 (%)



Base: All Respondents (N=26,574)

European Commission

Younger and more educated respondents are more likely to have travelled since 15 June

D9.1 In the last twelve months, how often have you travelled to another European Union country...?

Since 15 June 2017 (% EU)

	Total 'Yes'	Total 'No'
EU28	36	64
Age		
15-24	46	54
25-39	43	57
40-54	39	61
55+	26	74
Education (End of)		
15-	14	86
16-19	31	69
20+	44	56
Still studying	48	52

Base: All Respondents (N=26,574)

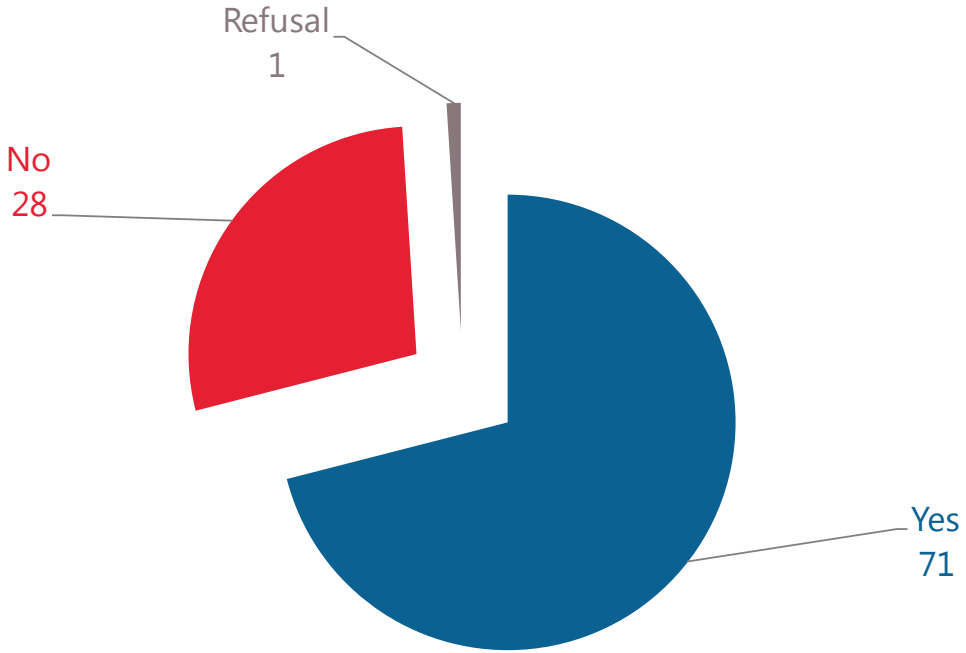
European Commission

II. AWARENESS OF THE END OF ROAMING CHARGES

European Commission

More than seven in ten respondents have heard about the end of roaming charges

Q3 Are you aware that since 15 June 2017 European Union residents can use their mobile phone while travelling in the European Union and pay the same as they would at home? **(% - EU)**

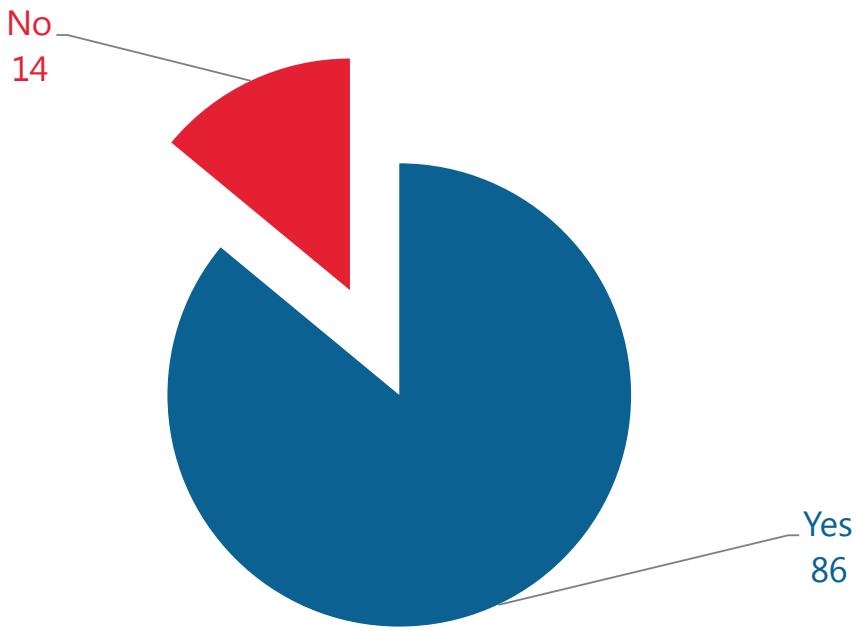


Base: All Respondents (N=26,574)

European Commission

Awareness is significantly higher among those who travelled in the EU since 15 June 2017

Q3R1 Are you aware that since 15 June 2017 European Union residents can use their mobile phone while travelling in the European Union and pay the same as they would at home? **(% - EU)**



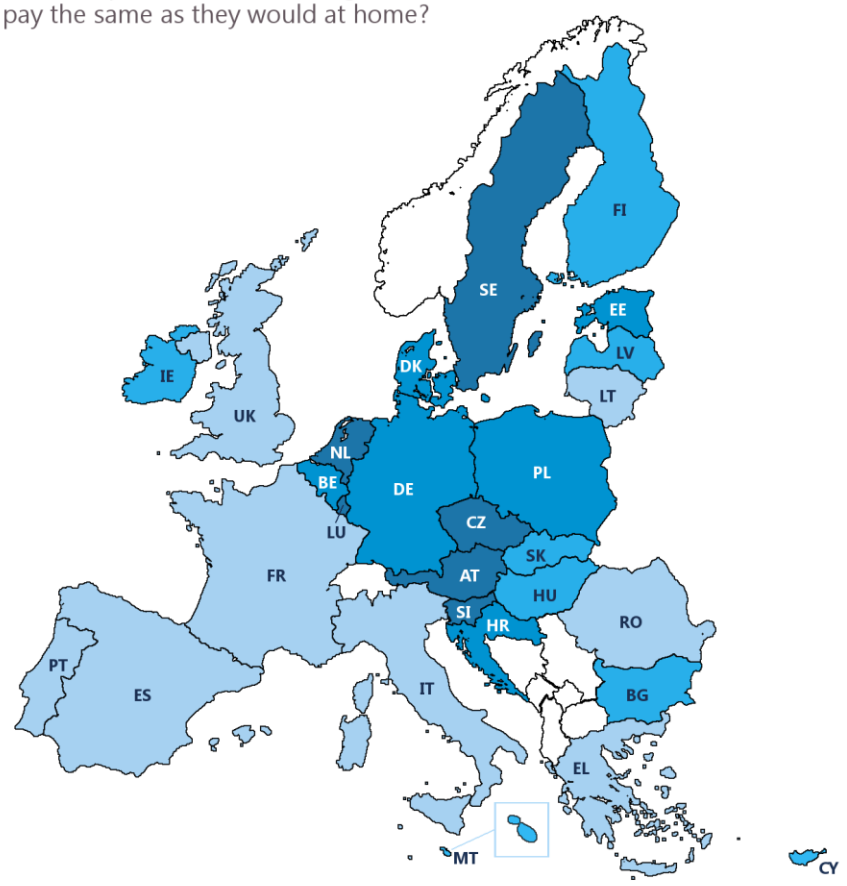
Base: Respondents with mobile phone
who travelled in another EU country since June 15 2017
(N=9,198)

European Commission

This is the case of a majority of respondents in each MS

LU	87
SI	86
AT	85
NL	85
CZ	84
SE	83
HR	82
EE	82
BE	82
DE	82
DK	81
PL	79
SK	78
HU	78
MT	77
LV	77
CY	74
IE	74
BG	73
FI	72
EU28	71
LT	68
ES	68
IT	67
PT	66
RO	63
UK	63
FR	59
EL	53

Q3 Are you aware that since 15 June 2017 European Union residents can use their mobile phone while travelling in the European Union and pay the same as they would at home?
(% - YES)



Base: All Respondents (N=26,574)

European Commission

Younger respondents are actually less likely to have heard of it

Q3 Are you aware that since 15 June 2017 European Union residents can use their mobile phone while travelling in the European Union and pay the same as they would at home?
(% EU)

	Yes	No	Refusal
EU28	71	28	1
Age			
15-24	60	40	0
25-39	72	28	0
40-54	76	23	1
55+	72	26	2
Education (End of)			
15-	53	45	2
16-19	70	29	1
20+	79	20	1
Still studying	65	35	0

Base: All Respondents (N=26,574)

European Commission

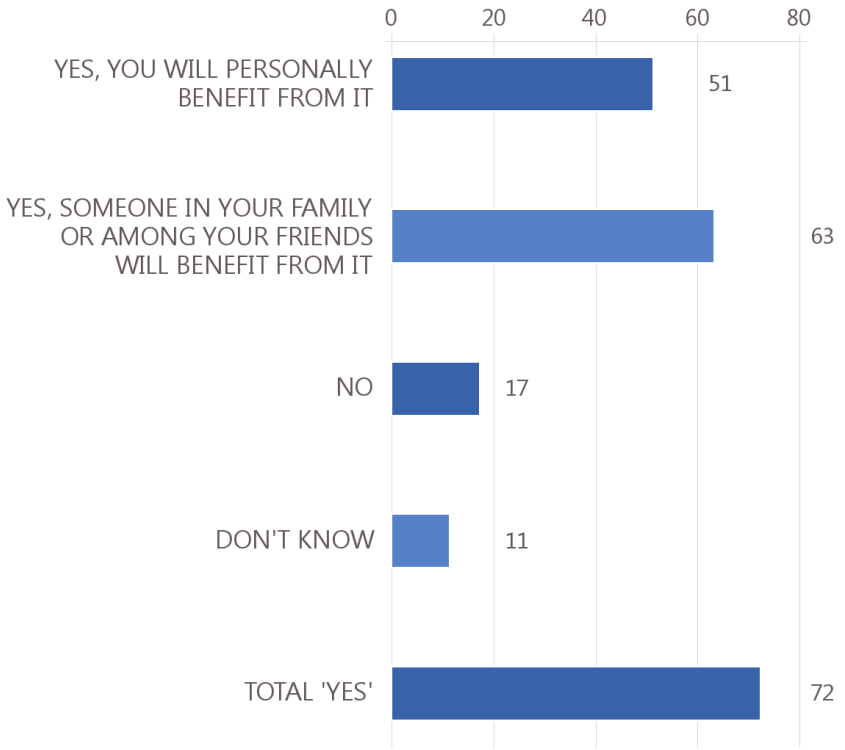
III. PERCEIVED BENEFITS OF THE END OF ROAMING CHARGES

European Commission

A large majority think that they or someone they know will benefit from the end of roaming charges

Q4 Do you think that you or someone in your family or among your friends will benefit from the end of roaming charges for the use of mobile phones abroad in the European Union? (MULTIPLE ANSWERS POSSIBLE)

(% - EU)



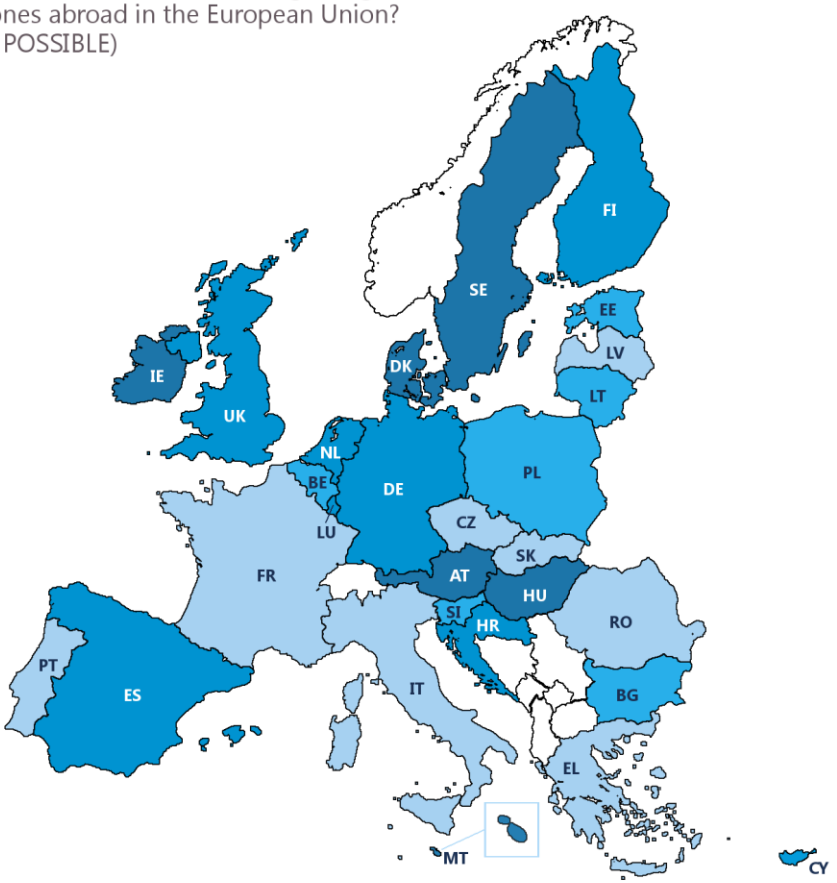
Base: All Respondents (N=26,574)

European Commission

The majority of respondents in each country think they will benefit from it

IE	91
MT	83
SE	83
DK	82
HU	81
AT	81
DE	79
ES	79
CY	79
NL	78
FI	78
HR	77
LU	77
UK	76
SI	74
BG	74
PL	73
BE	72
EU28	72
EE	70
LT	68
PT	67
IT	67
CZ	67
SK	65
LV	63
EL	61
RO	60
FR	59

Q4 Do you think that you or someone in your family or among your friends will benefit from the end of roaming charges for the use of mobile phones abroad in the European Union? (MULTIPLE ANSWERS POSSIBLE)
(% - TOTAL 'YES')



Base: All Respondents (N=26,574)

European Commission

Younger, more educated and employees more likely to benefit from the end of roaming charges

Q4 Do you think that you or someone in your family or among your friends will benefit from the end of roaming charges for the use of mobile phones abroad in the European Union? (MULTIPLE ANSWERS POSSIBLE)
(% EU)

	Yes, you will personally benefit from it	Yes, someone in your family or among your friends will benefit from it	No	Don't know	Total 'Yes'
EU28	51	63	17	11	72
Age					
15-24	64	71	15	4	81
25-39	63	68	15	6	78
40-54	55	65	17	9	74
55+	38	57	19	17	64
Education (End of)					
15-	26	45	25	23	52
16-19	46	60	19	11	69
20+	61	70	13	7	80
Still studying	67	74	13	4	83
Respondent Occupation Scale					
Self-employed	61	68	15	6	79
Employee	64	70	14	6	80
Manual workers	42	58	20	13	67
Not working	41	58	19	15	66

Base: All Respondents (N=26,574)

The more they travel the more they believe that they will benefit from the end of roaming charges

Q4 Do you think that you or someone in your family or among your friends will benefit from the end of roaming charges for the use of mobile phones abroad in the European Union? (MULTIPLE ANSWERS POSSIBLE)
(% EU)

	Yes, you will personally benefit from it	Yes, someone in your family or among your friends will benefit from it	No	Don't know	Total 'Yes'
EU28	51	63	17	11	72
Travelled in the last 12 months to another EU country since 15.06.2017					
Once	70	73	9	6	85
Two to three times	74	74	10	4	86
Four to five times	78	74	8	5	87
Six times or more	77	72	9	4	86
No	40	58	21	14	65

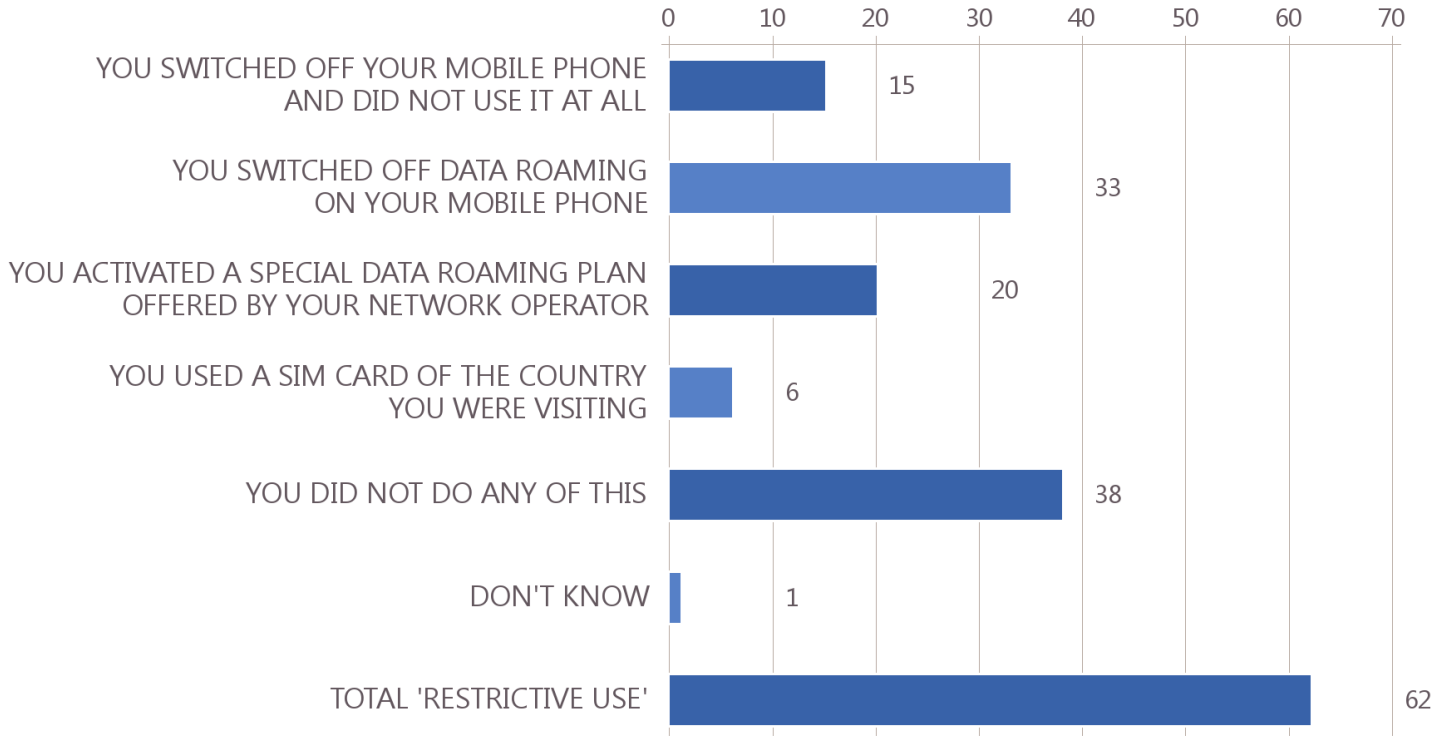
Base: All Respondents (N=26,574)

IV. USE OF MOBILE PHONES IN OTHER EU COUNTRIES

European Commission

Still a significant share of respondents who travel in the EU restrict the use of their mobile phone

Q1 The last time you visited another European Union country, did you do any of the following? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)

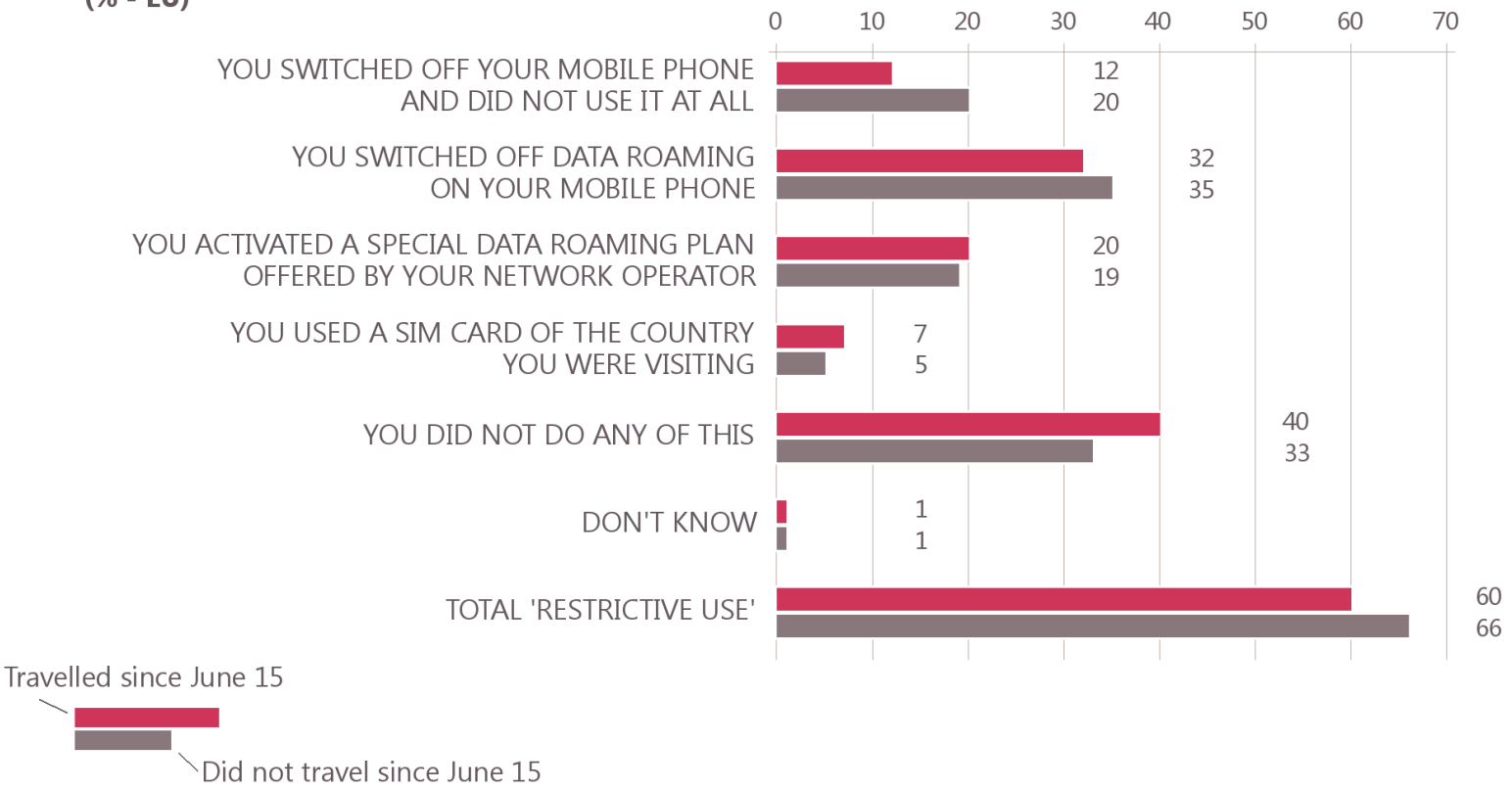


Base: Respondents with mobile phone who travelled in another EU country in the last 12 months (N=13,865)

European Commission

Respondents who travelled since 15 June less likely to have restricted their use of mobile phone

Q1R The last time you visited another European Union country, did you do any of the following? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base 1: Respondents with mobile phone who travelled in another EU country since June 15 2017 (N=9,198)

Base 2: Respondents with mobile phone who travelled in another EU country in the last 12 months only before June 15 2017 (N=4,667)

Older respondents are much more likely to have switched off their phones while abroad

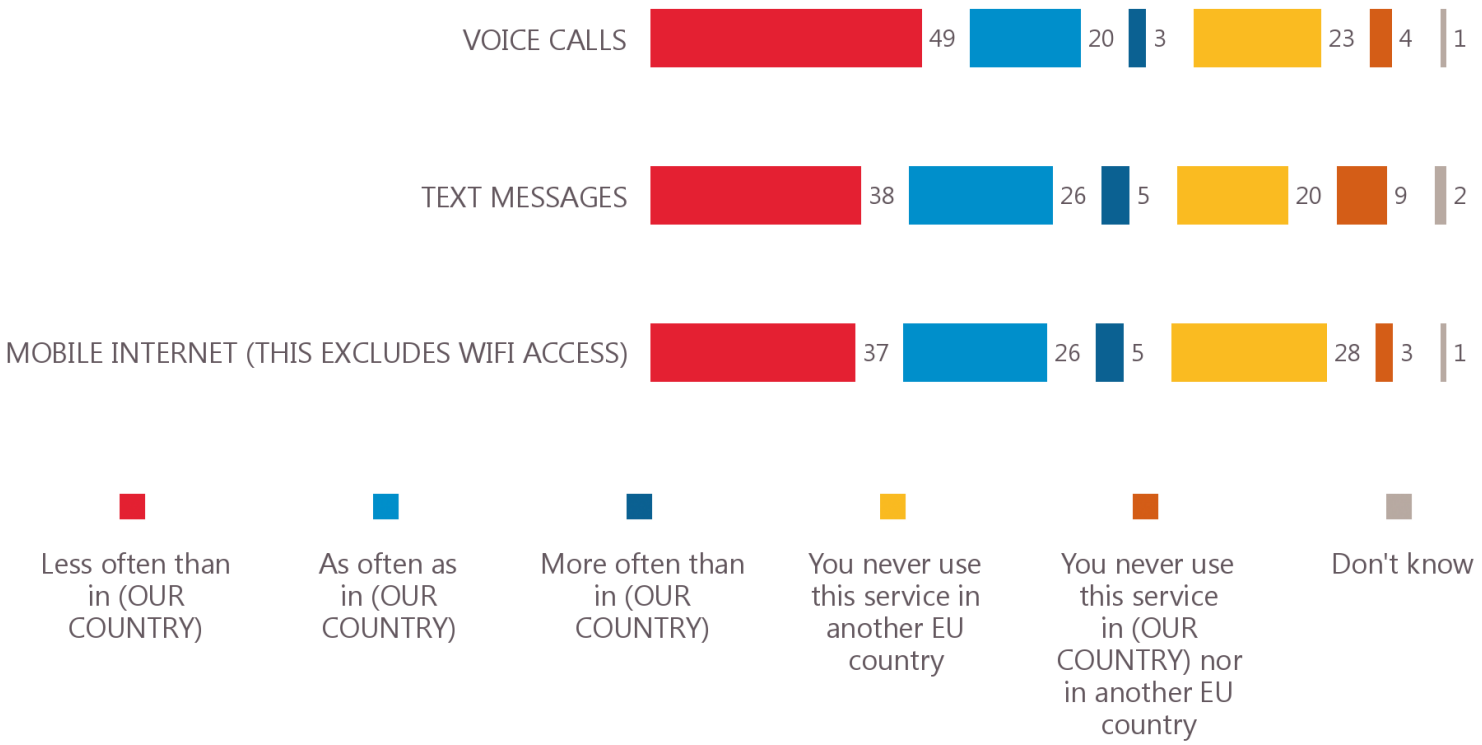
Q1R1 The last time you visited another European Union country, did you do any of the following? (MULTIPLE ANSWERS POSSIBLE)
(% EU)

	You switched off your mobile phone and did not use it at all	You switched off data roaming on your mobile phone	You activated a special data roaming plan offered by your network operator	You used a SIM card of the country you were visiting	You did not do any of this	Don't know	Total 'Restrictive use'
EU28	12	32	20	7	40	1	60
Age							
15-24	9	38	20	11	34	0	66
25-39	7	33	23	9	39	0	61
40-54	13	31	21	6	40	1	59
55+	19	27	17	4	45	1	54

Base : Respondents with mobile phone who travelled in another EU country since June 15 2017 (N=9,198)

There is still a majority of respondents who use less often their phones abroad

Q2a The last time you visited another European Union country, how often did you use the following services on your mobile phone?
(% - EU)



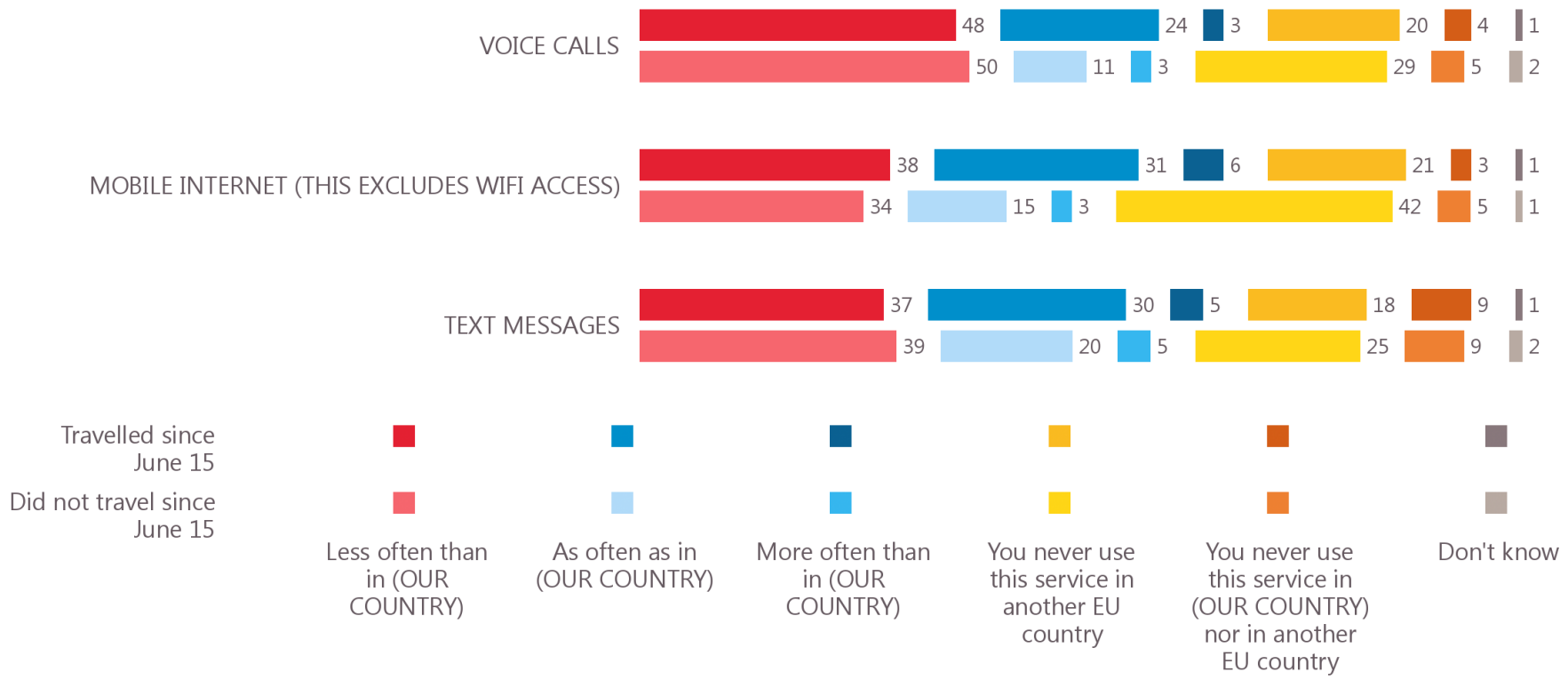
Base 1 & 2: Respondents with mobile phone who travelled in another EU country in the last 12 months (N=13,865)

Base 3: Respondents with a mobile phone connected to the Internet who travelled in another EU country in the last 12 months (N=11,822)

European Commission

Respondents who travelled since 15 June 2017 are much more likely to have used their phones like at home than those who did before 15 June

Q2aR The last time you visited another European Union country, how often did you use the following services on your mobile phone? **(% - EU)**

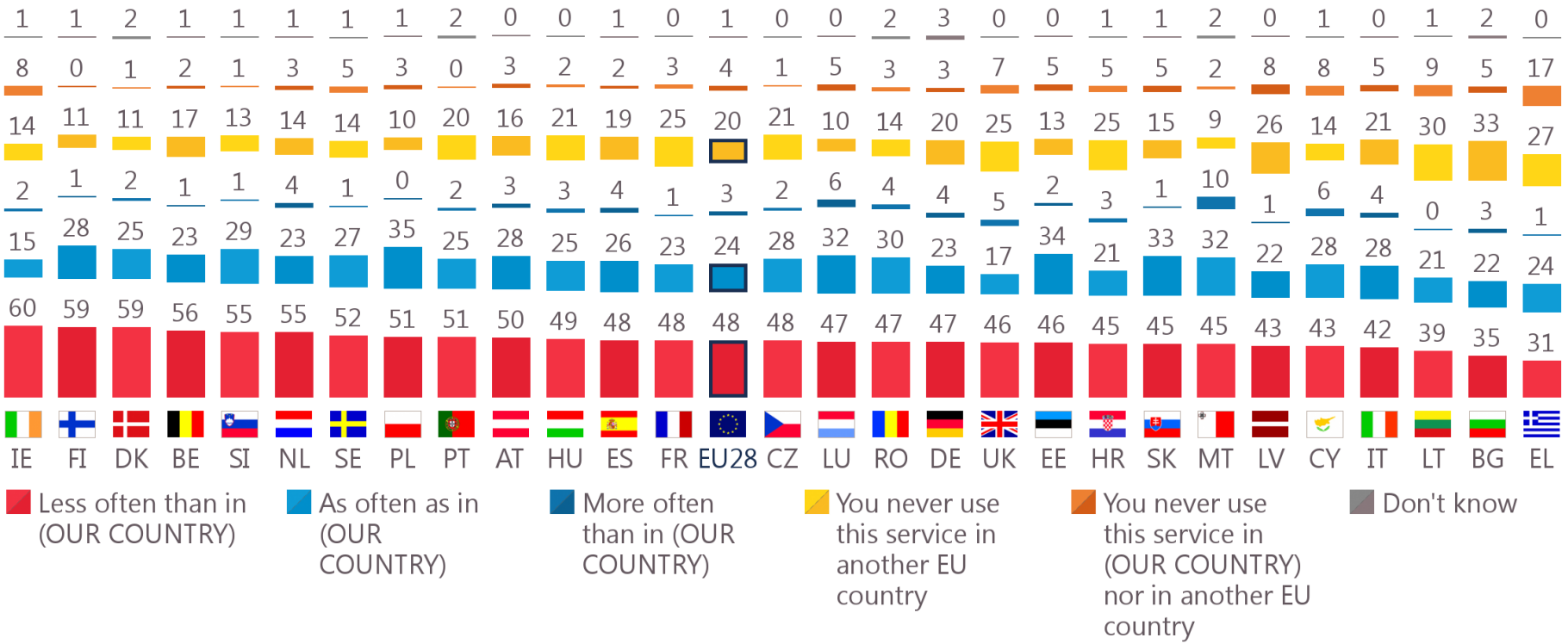


Base 1 & 5: Respondents with mobile phone who travelled in another EU country since June 15 2017 (N=9,198)
Base 2 & 6: Respondents with mobile phone who travelled in another EU country in the last 12 months only before June 15 2017 (N=4,667)
Base 3: Respondents with mobile phone connected to the Internet who travelled in another EU country since June 15 2017 (N=8,016)
Base 4: Respondents with mobile phone connected to the Internet who travelled in another EU country in the last 12 months only before June 15 2017 (N=3,806)

Voice calls abroad per country

Q2aR1.1 The last time you visited another European Union country, how often did you use the following services on your mobile phone?

Voice calls (%)



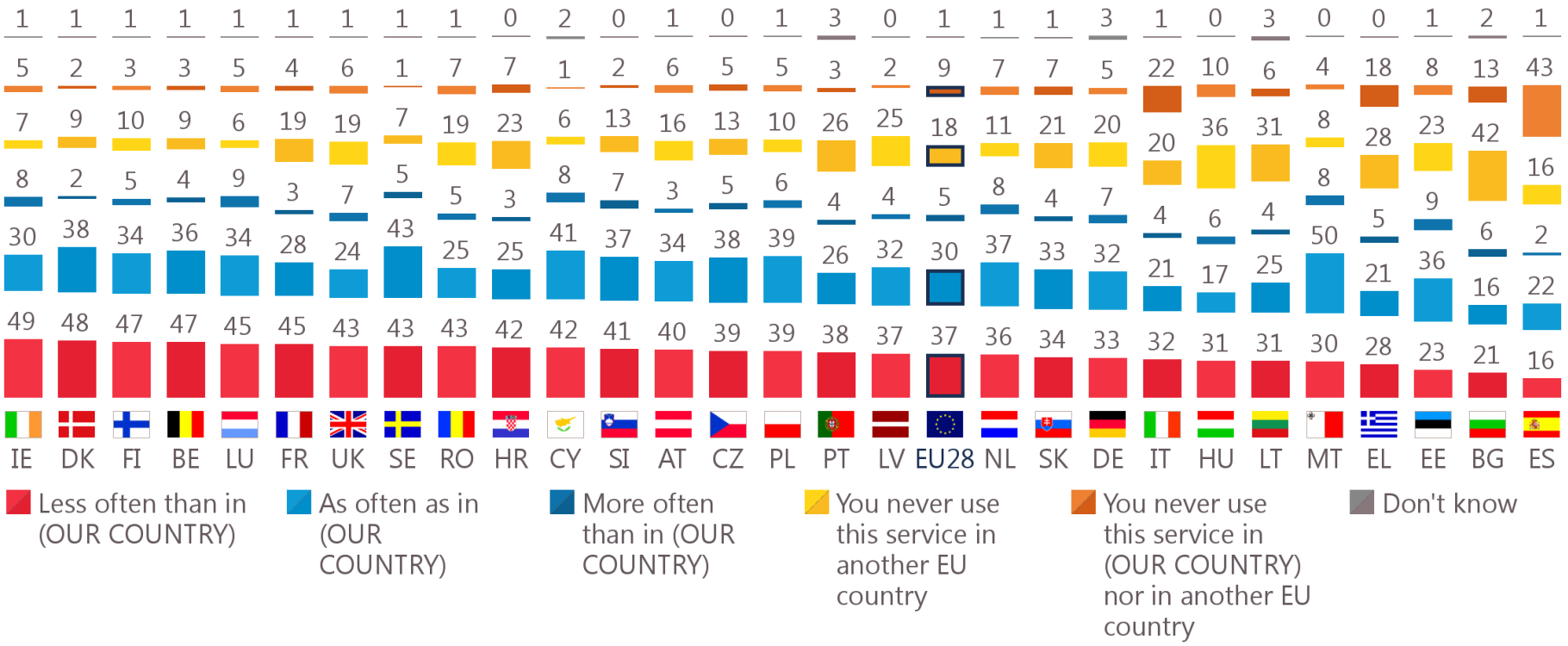
Base: Respondents with mobile phone
who travelled in another EU country since June 15 2017
(N=9,198)

European Commission

Text messages abroad per country

Q2aR1.2 The last time you visited another European Union country, how often did you use the following services on your mobile phone?

Text messages (%)



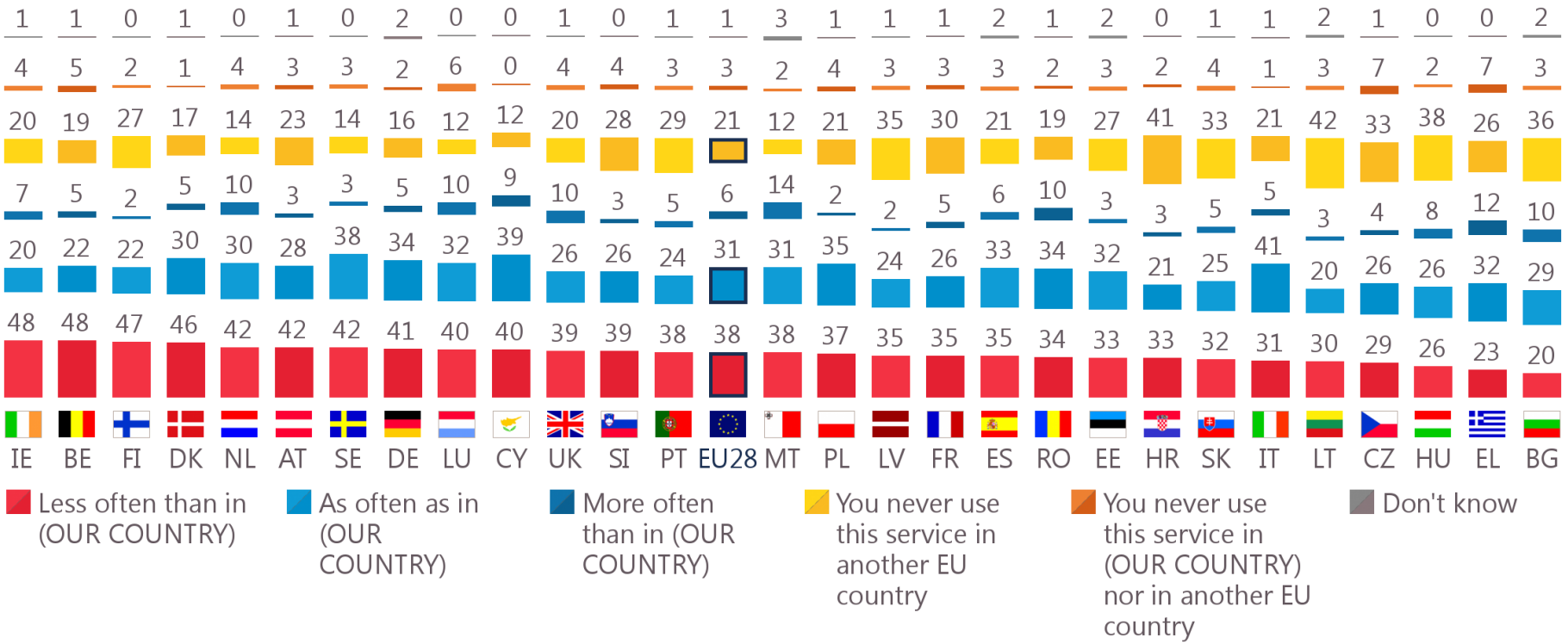
Base: Respondents with mobile phone
who travelled in another EU country since June 15 2017
(N=9,198)

European Commission

Mobile Internet abroad per country

Q2aR1.3 The last time you visited another European Union country, how often did you use the following services on your mobile phone?

Mobile Internet (this excludes WIFI access) (%)



Base: Respondents with a mobile phone connected to the Internet who travelled in another EU country since June 15 2017 (N=7,980)

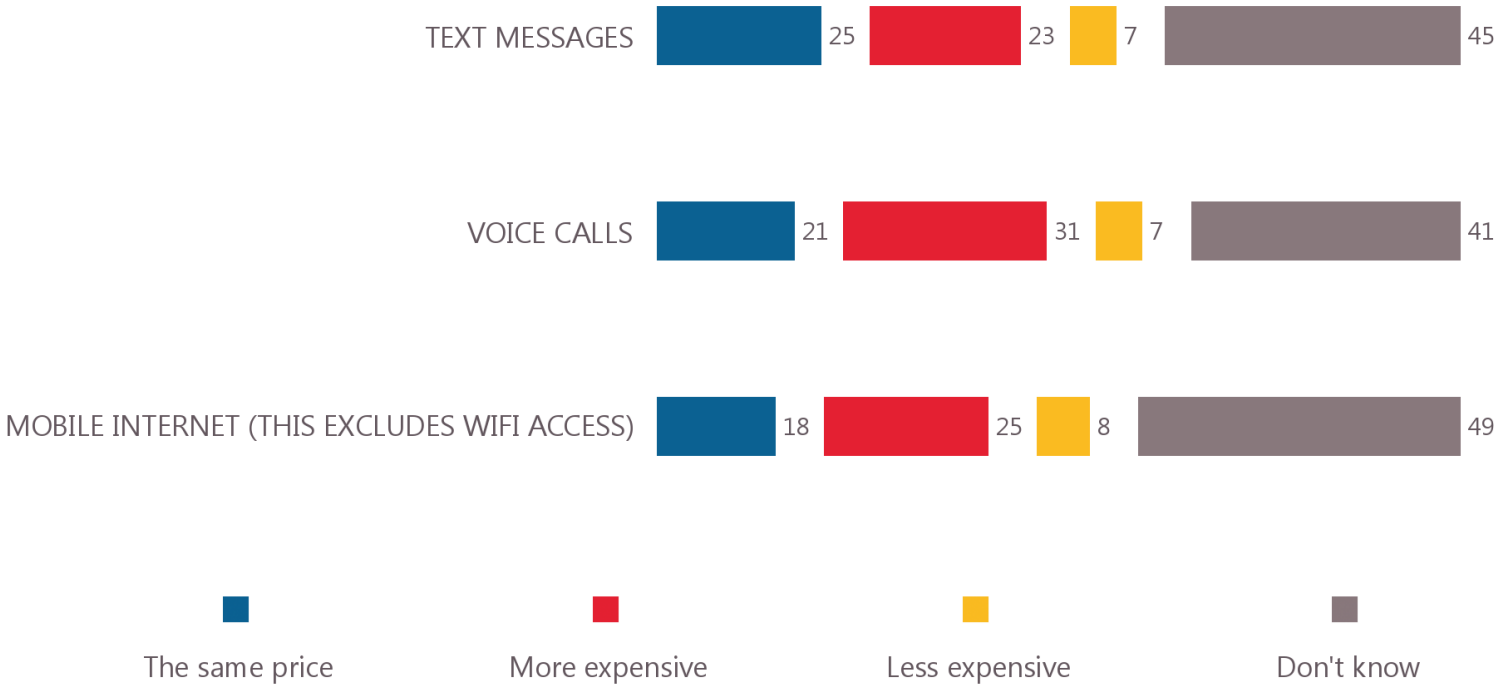
European Commission

V. PERCEIVED COSTS OF ROAMING AMONG THOSE WHO HAVE NOT TRAVELLED IN THE LAST 12 MONTHS IN THE EU

European Commission

Knowledge of the price of communication and data use abroad is low among non-travellers

Q2b Would you say that it is more expensive, less expensive or the same price to use the following services on a mobile phone while in another European Union country compared to using it in (OUR COUNTRY)?
(% - EU)



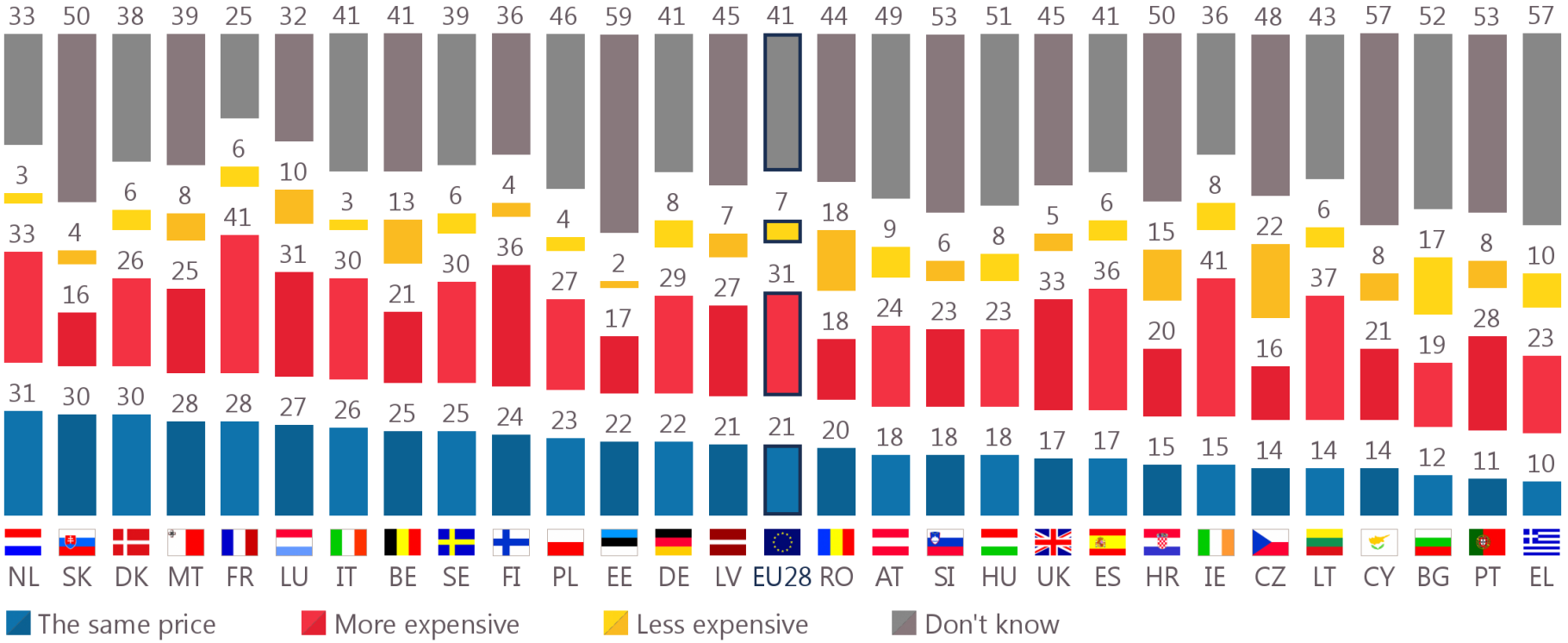
Base: Respondents who have not travelled in another EU country in the last 12 months and who have travelled in another EU country in the last 12 months but do not have a mobile phone (N=12,709)

European Commission

Knowledge of the price of voice calls abroad per country

Q2b.1 Would you say that it is more expensive, less expensive or the same price to use the following services on a mobile phone while in another European Union country compared to using it in (OUR COUNTRY)?

Voice calls (%)



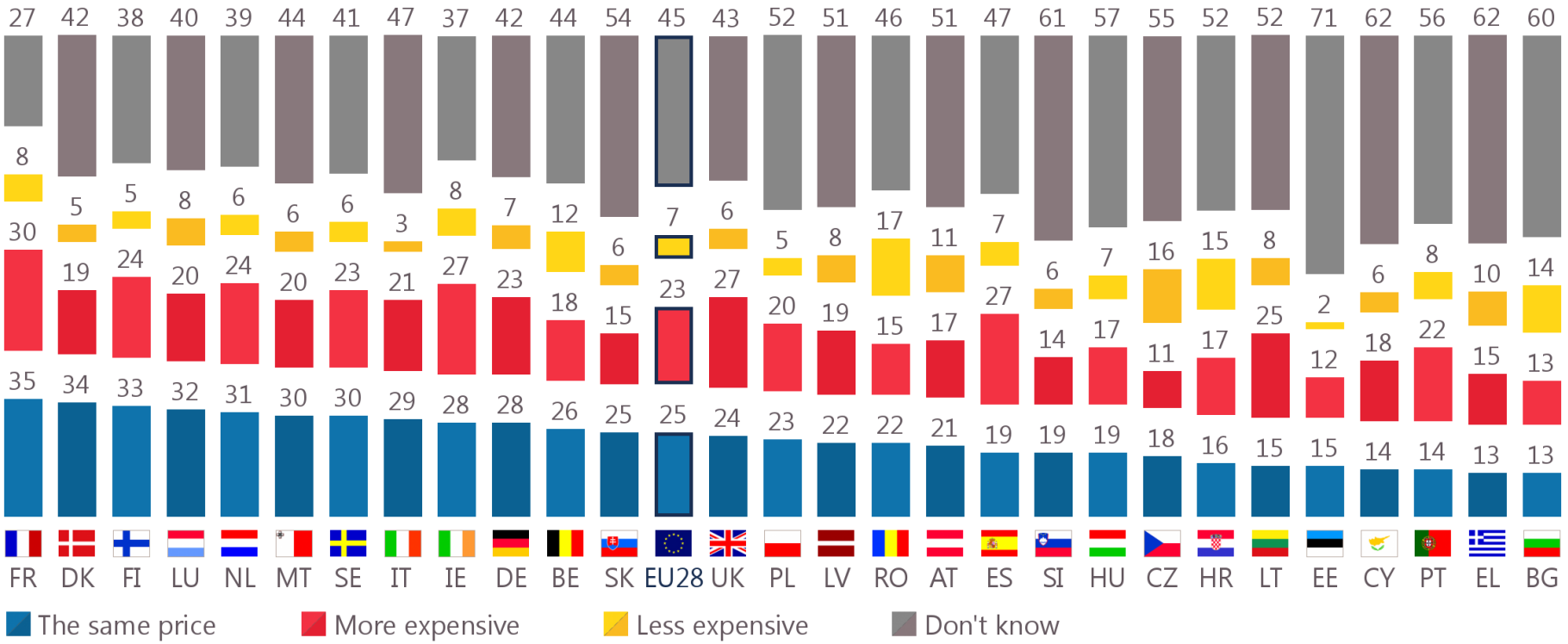
Base: Respondents who have not travelled in another EU country in the last 12 months and who have travelled in another EU country in the last 12 months but do not have a mobile phone (N=12,709)

European Commission

Knowledge of the price of text messages abroad per country

Q2b.2 Would you say that it is more expensive, less expensive or the same price to use the following services on a mobile phone while in another European Union country compared to using it in (OUR COUNTRY)?

Text messages (%)



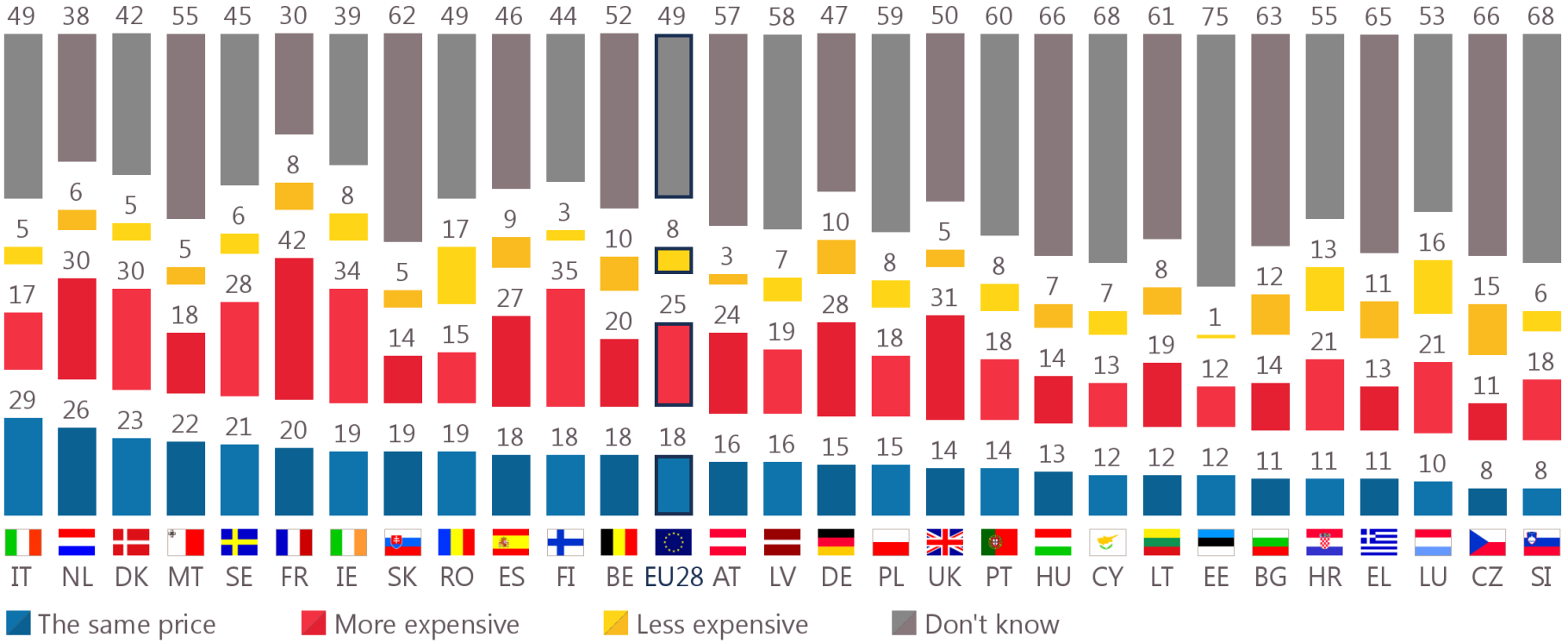
Base: Respondents who have not travelled in another EU country in the last 12 months and who have travelled in another EU country in the last 12 months but do not have a mobile phone (N=12,709)

European Commission

Knowledge of the price of mobile data abroad per country

Q2b.3 Would you say that it is more expensive, less expensive or the same price to use the following services on a mobile phone while in another European Union country compared to using it in (OUR COUNTRY)?

Mobile Internet (this excludes WIFI access) (%)



Base: Respondents who have not travelled in another EU country in the last 12 months and who have travelled in another EU country in the last 12 months but do not have a mobile phone (N=12,709)

European Commission

Conclusions

- Awareness of the end of roaming charges is high: over 70% of the respondents.
- The high awareness goes with perceived future benefits: more than 70% of the respondents think they or someone they know will benefit.
- There is a noticeable change in behaviour: since 15 June 2017 travellers are now more likely to use their mobile phone like at home when they are abroad than before that date (31% compared to 15% for data; 11 compared to 24% for calls).
- However, there is still room for a wider change in behaviour, as still 60% of travellers since 15 June 2017 have had a restrictive use of their mobile phone abroad.