Annex Four

Inadvertent roaming on Northern Ireland/Republic of Ireland borders

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Section One

Introduction and methodology

Ofcom is aware that consumers either travelling or living near the Northern Ireland /Republic of Ireland border may pick up mobile signals from across the border. The impact is that these consumers would incur roaming charges for any calls made whilst using this network.

Ofcom conducted some consumer research in order to quantify the extent of cross-border network usage alongside awareness and opinions of roaming charges while travelling in the Republic of Ireland. The research also assessed whether consumers in Northern Ireland would be prepared to pay extra for an 'all island' tariff. The findings are detailed in this report.

The survey was conducted for Ofcom by Millward Brown Ulster between 21-28 August 2004 amongst 1005 adults in Northern Ireland 16+. The survey was designed to reflect the Northern Ireland profile of sex, age, and working status. Quotas were fully met therefore no weights were applied to the data. As the survey was conducted amongst a sample of adults rather than the whole population the data may be subject to a small margin of error. The error margin for a total sample of 1005 consumers is about 2-3%, but higher among smaller sub-groups.

Results referred to as significantly different have been tested at the 95% level of confidence and hence are outside of the error margins and therefore can be considered real changes.

Section Two

Summary

Just under half of mobile customers in Northern Ireland claim to have received a signal from the Republic of Ireland while in Northern Ireland (400,000). A third of these consumers used this signal which equates to around 180,000 mobile customers.

Younger consumers and contract customers appear most likely to have used a Republic of Ireland network whilst in Northern Ireland. Consumers that have used a roamed network have higher than average awareness of roaming charges, 51% and 29% respectively.

Any advice being provided to mobile customers in Northern Ireland regarding inadvertent roaming does not appear to be reaching them. The vast majority (90%) of consumers do not recall receiving any such advice.

Travellers to the Republic of Ireland that use their mobiles are generally dissatisfied with the cost of doing so (79%). Faced with the option of an ‘all-island’ tariff, frequent travellers appear to have a higher willingness to pay for this option (£7.50-£10). However, half were not prepared to pay anything.

Section Three

Main findings

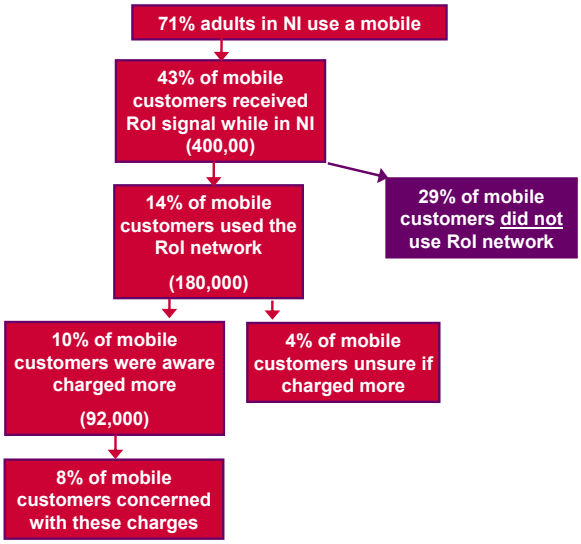
To what extent are Republic of Ireland networks being used in Northern Ireland?

Just under half (43%) of Northern Ireland (NI) mobile customers claim to have received a signal from the Republic of Ireland (RoI) while in NI. This equates to nearly 400,000 mobile customers. However, in total only a third of these (14% of all mobile customers) used this network, as illustrated in figure 1.

A proportion of the mobile customers that did not use the cross-border signal (28%) may have manually re-selected a Northern Ireland network. However, others may have simply not made or accepted the call.

The majority of customers that made a call using the Republic of Ireland network were aware that they were charged more for this. A further 4% were unsure whether they were charged more – the majority of these being pre-paid mobile customers.

Figure 1 Mobile customers' use and opinion of charges while using Republic of Ireland network in Northern Ireland
Base: 718 NI mobile customers



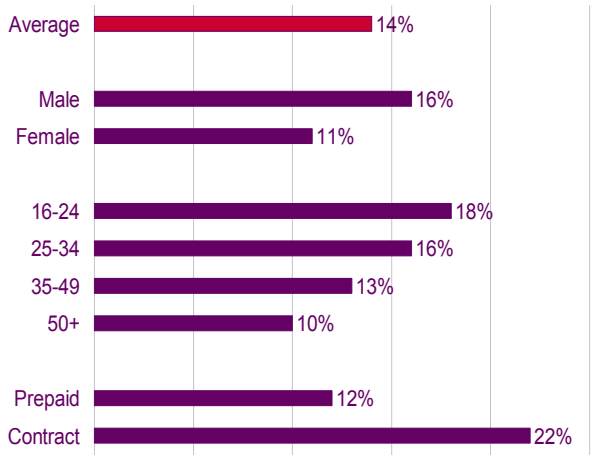
Which consumers are using cross-border signals in Northern Ireland?

As illustrated on the previous slide, around 92,000 (10%) mobile customers remember incurring roaming charges when using a network from across the border. The majority of these customers were concerned about these charges.

Younger consumers (aged 16-24) and contract customers tend to be those most likely to have made a call using the roamed network, illustrated in figure 2.

Any advice that has been provided in Northern Ireland by the mobile companies does not appear to be reaching consumers. The majority (90%) could not recall being provided with any advice on how to react when a roamed signal is picked up.

Figure 2 Profile of consumers that used the Republic of Ireland network
Base: 718 Northern Ireland mobile customers



Are consumers aware of the cost of using a roamed network?

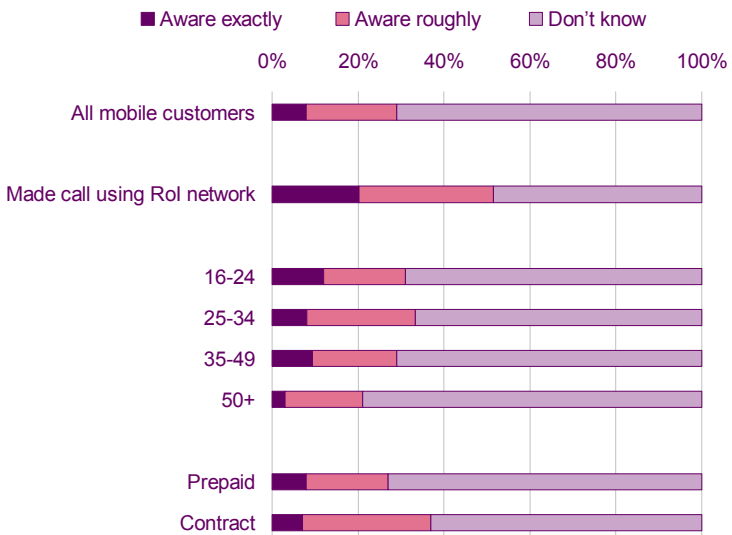
Around 180,000 Northern Ireland mobile customers (14%) used a Republic of Ireland network while in Northern Ireland and therefore incurred roaming charges. Half of these consumers (48%) were unaware of roaming costs, as illustrated in figure 3.

It should be noted that the data is not able to confirm whether or not these consumers were generally aware that calls using roamed networks are more expensive.

However, consumers that received and used a Republic of Ireland network while in Northern Ireland appear more aware of the charges than average - perhaps as a result of doing so.

There was little difference in awareness according to age or type of mobile package.

Figure 3 Awareness of cost of roaming
Base: 718 Northern Ireland mobile customers



To what extent would an 'all-island' tariff benefit consumers?

Around 655,000 mobile customers in Northern Ireland travel to the Republic of Ireland. Half of them (51%) have used their mobile while there, at least once. The majority (79%) were dissatisfied with the cost of doing so. The following table illustrates the frequency travellers use their mobile while across the border. Frequent travellers are more likely to use their mobile – 63% of weekly travellers have done so compared to 37% of those that visit the Republic of Ireland yearly or less frequently.

In addition a further 46,000 mobile customers (5%) have picked up a Republic of Ireland network but have **never** travelled across the border. These two groups of consumers (equating around 700,000 mobile customers) may benefit from an 'all-Ireland' tariff that reduces roaming charges.

Figure 4 Frequency cross-border travellers use their mobile while in the Republic of Ireland
Base: 718 Northern Ireland mobile customers

	Frequency travel to Republic of Ireland				
Frequency use mobile in RoI	*At least weekly (12%)*	*1-3 monthly (14%)*	*Few times a year (18%)*	*Yearly or less (28%)*	***Ever travel (72%)***
Always	18%	27%	16%	10%	**16%**
Mostly	14%	14%	12%	2%	**9%**
Sometimes	29%	19%	18%	12%	**18%**
Once	1%	5%	7%	12%	**8%**
Never	37%	36%	45%	63%	**49%**
Ever use	**63%**	**64%**	**55%**	**37%**	**51%**

How much are consumers prepared to pay for an 'all-island' tariff?

Faced with the option of an 'all-island' tariff most consumers were either unprepared to pay anything for this type of tariff (49%), or were unable to suggest an appropriate cost for such a service (28%).

Those with most to gain (travellers to the Republic of Ireland) were willing to pay around £5 per month. However, there appear to be two distinct groups of consumers - with the first only willing to pay up to £2 per month and the second willing to pay between £7.50-£10 per month for this specialised tariff.

The results indicate that more frequent travellers (daily/weekly) have a higher willingness to pay. **However, this finding has been drawn from a small base size and so should be treated as indicative only.**

Willingness to pay for an 'all-island' tariff amongst consumers that had received a Republic of Ireland network were broadly similar in terms of the two diverse groups. However it should be noted that this may not reflect their willingness to pay to reduce

inadvertent roaming charges, as the majority of this group (88%) also travel to the Republic of Ireland at least occasionally.

How does satisfaction with geographic coverage compare to the UK?

Given that call success rates within Northern Ireland are broadly similar to the UK it is encouraging to see that satisfaction with geographic coverage is also similar.

Satisfaction with geographic coverage amongst mobile customers in Northern Ireland stands at 90%. A further 3% expressed a neutral opinion, leaving 6% dissatisfied with this aspect of their mobile service. This compares to the UK average of 88% satisfaction reported in August '03.

Details of call success rates can be found at the following link – see figure 15:

http://www.ofcom.org.uk/consultations/past/telecoms_review1/telecoms_review/tcoms_annexs.pdf

Section Four

Questionnaire

Q1. Do you personally use a mobile phone?

Q2. Which of these statements best describes the mobile package you personally use most often?

- Pre-paid / pay as you go package (ie after paying a one off fee for the phone, “top up” is bought as and when required)
- Monthly contract (ie. line rental and call charges are paid each month)
- All in one package (ie. phone and any line rental is paid in advance and calls are either billed monthly or paid by call vouchers)
- Other
- Don’t know

Q3. Which mobile phone supplier, do you personally use?

Q4. Approximately how often, if ever, do you go to the Republic of Ireland?

- Every day / most days
- Weekly
- Monthly
- Every 2-3 months
- A few times a year
- Once a year
- Less than once a year
- Never
- Don’t know

Q5. How often, if ever, have you used your mobile phone when visiting the Republic of Ireland?

- Every time I have been there
- Most of the times I have been there
- Some of the times I have been there
- Once
- Never
- Don’t know

Q6. Which of the following best describes how much you know about the cost of using your mobile phone in the Republic of Ireland?

- I know exactly how much it costs to use my mobile in the Republic of Ireland
- I know roughly how much it costs to use my mobile in the Republic of Ireland
- I don’t really know how much it costs to use my mobile in the Republic of Ireland
- Don’t know/no answer

Q7. How satisfied are you with the cost of making mobile phone calls whilst in the Republic of Ireland?

- Very satisfied

- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied

Q8. Has your handset ever received a Republic of Ireland signal while in Northern Ireland?

Q9. Did you make or receive calls whilst the handset had a Republic of Ireland network whilst in Northern Ireland?

Q10. Were you charged more than normal whilst your handset has a Republic of Ireland network whist in Northern Ireland?

Q11. How concerned are you that you may have been charged more for using a Republic of Ireland network whilst in Northern Ireland?

- Very concerned
- Concerned
- Neither concerned nor unconcerned
- Unconcerned
- Very unconcerned

Q12. How much more would you be prepared to pay for an ‘all-island’ tariff?

Q13. Has your mobile phone provider ever provided you with advice on what to do if your phone picks up a signal from the Republic of Ireland?

Q14. How satisfied are you with the geographic coverage of your mobile phone network?

- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied