



## Roaming Bill Shock Research: the industry needs to deploy more innovation to win back silent roamers

- *Roaming Bill Shock Research by ROCCO and UROS provides new insight into roaming bill shock*
- *Up to 90% of roamers are silent roamers*
- *86% of operators think that bill shock issues may increase with LTE*

ROCCO & [UROS](#) global Roaming Bill Shock Strategy Research concluded last week providing many new insights into the status of Roaming Bill Shock today. Between September and October 2015 ROCCO asked GSMA operators globally to give their perceptions of roaming bill shock, how they thought roaming bill shock occurred and what solutions they were facing in resolving these occurrences.

The 51 operator respondents provided confidential data from the perspective of several groups and several of the largest operators in the world, making 114 operators in 83 countries the sample for this research. In total the operator base represented a subscriber base of 2.5 Billion.

The operators explained what solutions they had implemented and how successful they were in winning back customers. The survey was about understanding the impact of bill shock but also realising its effect on subscriber behaviours e.g. silent roamers – subscribers who switch off their data service when travelling.

This unique joint venture between ROCCO and Gerrit Jan Konijnenberg CEO of UROS Uni-fi Roaming Solutions, brought together a comprehensive research plan focussing on the main areas of roaming bill shock, how much operators were challenged by this and what methodology they were using to prevent further occurrences.

"The research reported by ROCCO, shows that the percentage of silent roamers is on average 80-90% of operators' subscribers who are travelling abroad, this is very high! Also 86% of operators are afraid the bill shock issue might even grow further with faster LTE networks. So it is time to act!" says Konijnenberg.

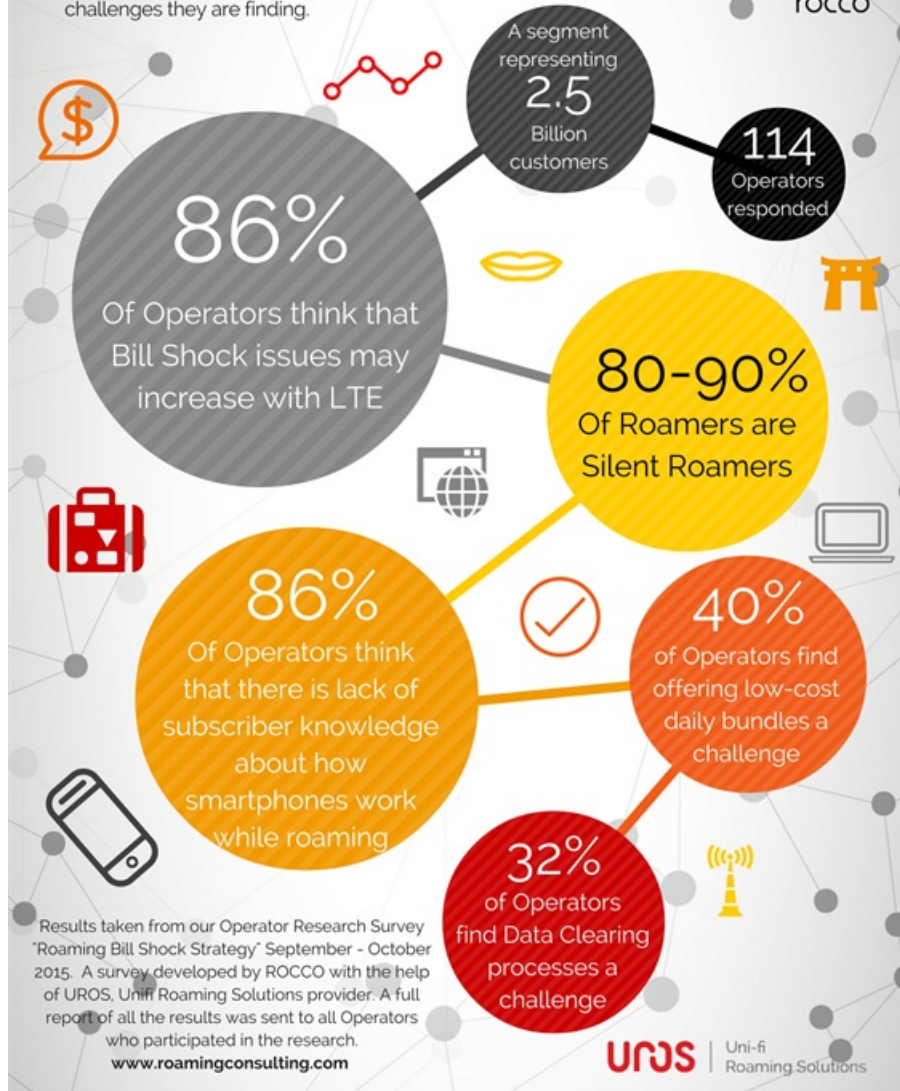
It's clear that in recent years the roaming bill shock landscape has changed; regulation has introduced transparency measures and device manufacturers have also stepped in to help subscribers manage their roaming. However, bill shock remains a considerable impact for operators because roaming regulation isn't global yet and the effects potentially lead to churn, reputational issues and has been the foundation of what we now know as the 'silent roamer'.

"More needs to be done by Industry bodies, Operators, Device manufacturers and Subscribers about understanding the issues," says ROCCO CEO Jason Bryan. "We were delighted with the response here and insights from the groups and we hope to continue this dialogue in the future with further research and analysis".

The report is not for sale but operators who participated in the research will receive the full and exclusive report of the findings. An executive summary of the report will be available from [uros.com](#) press section. Details about the research and its methodology can be obtained from the ROCCO CEO Jason Bryan, [contact@roamingconsulting.com](mailto:contact@roamingconsulting.com).

# ROAMING BILL SHOCK IN 2015

In September, October 2015 we asked Operators globally to give their views about the impact of Roaming Bill Shock in 2015. They told us about the key challenges they are finding.



## About UROS

UROS - Uni-fi Roaming Solutions - is an innovative Finnish company specially incubated to combat bill shocks. UROS offers global roaming solutions via its patented 4G Goodspeed mobile hotspots and its global roaming platform. The system steers and monitors the devices connected via M2M whilst travelling in mobile networks around the globe. The solution solves the slow TAP flow issue for Mobile Operators and MVNOs, helps to provide bill-shock free roaming and re-connects silent roamers. The unique mobile hotspots carry up to 10 physical local SIM cards, making the solution ideal also for Operator Groups who can deploy multiple SIM profiles. For more information, please visit [uros.com](http://uros.com).

## About ROCCO

ROCCO is an international consulting company based in the UK, working with operators and vendors globally with Strategy, for specific industry research and education and doing projects focused on industry hot topics like LTE, IPX and roaming regulation. Neutral in its outlook, over 500 mobile operators annually take part in ROCCO Research on vendor performance and market pricing.