



# **Bermuda Broadband Market Study**

## **Research Results**

for:



September 2013

# Survey Overview

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## Sample/Methodology

- Mindmaps utilised Computer Assisted Telephone Interviewing (CATI) to survey a representative sample of 400 Bermuda residents aged 18 and over.
- The total sample was weighted to be representative of Bermuda's population by age, gender and education according to the 2010 population and housing census figures.
- The margin of error for the study was +/- 4.9%.
- Employees in the following industries were excluded:
  - Marketing/Market Research Firm
  - Advertising Agency or Public Relations Firm
  - Telecommunications Service Provider
- The survey was conducted in September 2013 and lasted approximately 15 minutes.

# Survey Overview

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- Research Objectives:
  - Provide a benchmark measure of:
    - Internet usage and device ownership
    - Internet Access and Service Provider market share
    - Internet download speeds
    - Average monthly expenditure on Internet
  - Obtain perceptions of:
    - The necessity of having Internet Access and Service Providers
    - Important factors when selecting an Internet Service Provider
    - Satisfaction with Internet Service Providers and Likelihood to Recommend
    - Likelihood of switching Internet Service Providers



# **Executive Summary**

# Executive Summary

## Internet Penetration and Device Ownership

### ■ *Bermuda has high Internet penetration*

- *Ninety-one percent of residents have Internet service in their home*
- *Just over one quarter (27%) without Internet service said they do not need it*
- *Twelve percent of those without Internet service are likely to get it in the next 6 months*
- Most residents have an Internet-ready device in their home

Laptop computer	Tablet	Desktop computer	Netbook
82%	56%	54%	7%

## Market Share

### ■ *Logic/ North Rock is a dominant force in the Internet market*

- *DSL and Cable Line access account for 80% of all Internet access*
- *The combined entity of Logic and North Rock has 75% of the Internet service market*

Market Share - Internet Access	Share
DSL	44%
Cable Line	36%
Wireless (North Rock)	13%
Wireless (CellOne/ easyConnect)	4%
Dial Up	0.3%

Market Share - Internet Service	Share
Logic/ North Rock	75%
Digicel/ Transact	15%
TBI	7%

# Executive Summary

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## Download Speeds and Monthly Expenditure

- ***Cost of Internet access and service is considered expensive in Bermuda and is a deterrent to upgrading download speed***
  - *Seventy percent of residents have download speeds between 3MB and 8MB*
  - *Only 5% have download speeds greater than 15MB*
  - *Sixty-six percent of residents are satisfied with their Internet speed*
  - *Fifteen percent of residents are likely to upgrade their speed in the next six months*
    - *Reasons to upgrade – to improve speed, improve overall service*
    - *Reasons not to upgrade – happy with current speed/service, too costly*
  - *The average monthly expenditure on Internet access and service is \$121.93*
  - *The majority of residents (71%) think that the cost of Internet access and service in Bermuda is expensive.*

## Price

- ***Residents are price sensitive. Cost is the number one issue for residents and they are willing to switch providers for lower cost***
  - *Forty-three percent of residents said that cost is the number one issue with Internet service*
  - *Sixty-two percent of residents would switch providers if the monthly cost of Internet service could decrease by 20%*

# Executive Summary

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## Information Internet Service

- ***Information on Internet service is available and provides adequate information for residents to select a provider***
  - *Bermuda residents receive information regarding Internet service and pricing from advertisements (57%), family or friends (46%), customer care (43%) and providers' websites (39%)*
  - *Sixty-four percent of residents think it is easy to select an Internet service based on the information available*

## Internet Access and Service Provider

- ***Residents do not like the separation of Internet access and service***
  - *Residents generally agree that having both an Internet access and service provider is more expensive (85%), more complicated (84%) and they would prefer to have only one provider (83%) and one bill (81%).*
  - *Residents find having two suppliers to be annoying (35%) and it takes longer to resolve issues (15%).*

# Executive Summary

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## Importance Factors

- *Although speed and quality of service are important, customer service is also a key factor when deciding on a service provider*
  - *Quality of service (96%), customer service (96%) and reliability (95%) are the three most important factors when deciding upon an Internet Service Provider*
  - *Residents are most satisfied with their Internet Service Provider's customer service (82%), technical support (79%), quality (78%) and reliability (77%) of Internet service*



# Executive Summary

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## Likelihood to Switch Providers

### ■ *Increased competition from TBI has resulted in residents switching providers*

- *Nineteen percent of residents have switched Internet Service Providers in the past 2 years*
- *TBI customers (56%) are more likely to have switched providers in the past 2 years*
- *Just over three quarters of residents (77%) do not think it is difficult to switch Internet Service Providers*
- *Eleven percent of residents are likely to switch providers in the next 6 months*
  - *Reasons to switch – unhappy with speed/service of current provider, cheaper rates elsewhere*
  - *Reasons not to switch – happy with provider, not unless there is a better deal elsewhere*

# Executive Summary

## Satisfaction with Internet Service Provider

### ■ *Residents are moderately satisfied with their Internet Service Provider*

- *The mean satisfaction score is 7.48 out of 10. TBI customers are the most satisfied*

Satisfaction with Internet Service Provider - Mean Score			
Total	Digicel/ Transact	Logic/ North Rock	TBI
7.48	6.36	7.63	8.72

- *Lower prices (31%), better reliability and value (16%) and faster speeds (12%) are the most popular suggestions for improvement*

## Likelihood to Recommend Internet Service Provider

### ■ *Residents are moderately willing to recommend their Internet Service Provider*

- *The mean likely to recommend score is 7.27 out of 10. TBI customers are the most likely to recommend*

Likelihood to Recommend - Mean Score			
Total	Digicel/ Transact	Logic/ North Rock	TBI
7.27	6.32	7.41	8.59

# Executive Summary

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## Importance of Internet in Daily Life

- ***The Internet is becoming a necessity rather than a luxury***
  - *Just over half of residents (54%) feel they cannot live without the Internet*
  - *Residents aged 35 to 44 (73%) and 45 to 54 years (79%) are more likely to feel they cannot live without the Internet*

## Perceptions of Regulatory Authority

- ***Awareness of the Regulatory Authority is not high***
  - *Just over one quarter of residents (27%) are aware of the Regulatory Authority*
  - *Residents feel the purpose of the Regulatory Authority should be to regulate and ensure the legality of telecom providers (29%) and protect consumers by ensuring the best services and rates (28%)*



## **Detailed Findings**



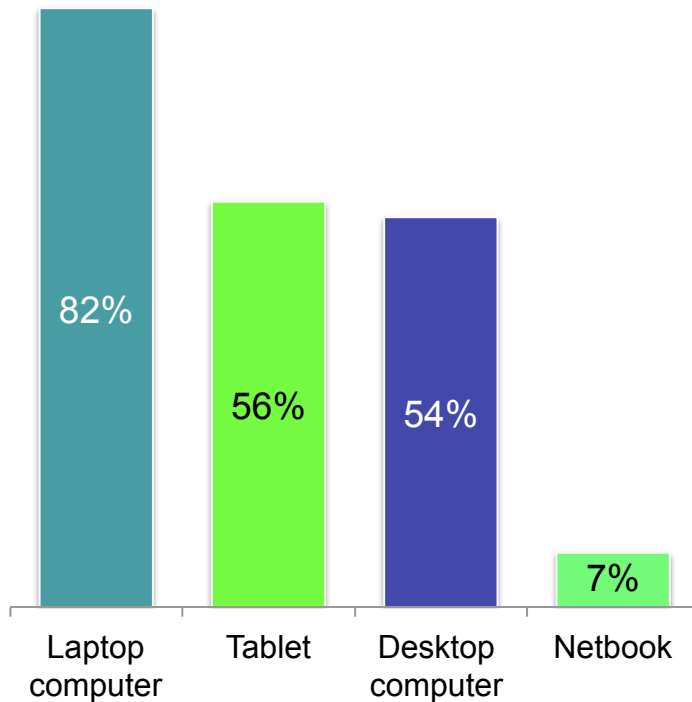
# **Internet Usage & Market Share**

# Device Ownership

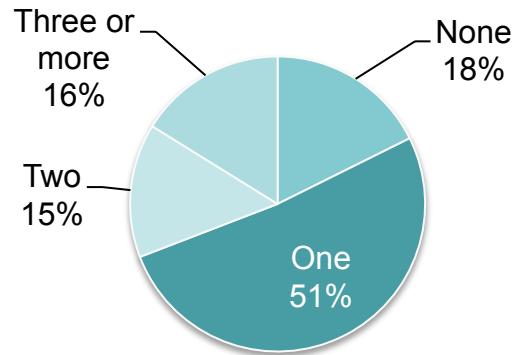
*How many of the following types of devices do you have in your home?*

- ❑ The majority of residents (82%) own at least one laptop computer.

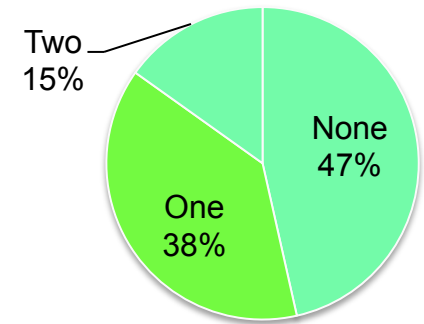
**Total Ownership**



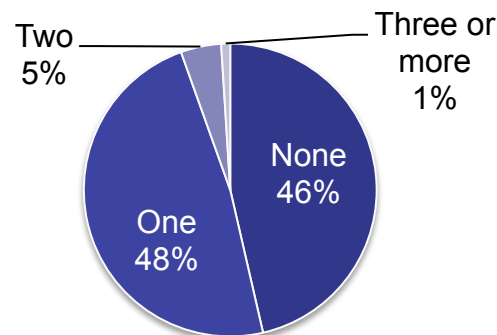
**Laptop computer ownership**



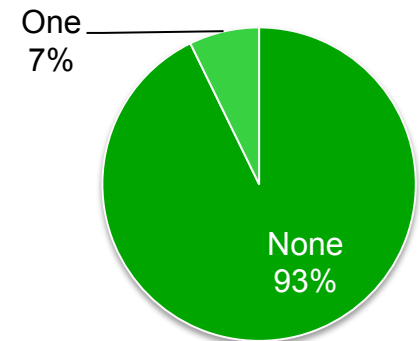
**Tablet ownership**  
such as an iPad or Kindle



**Desktop computer ownership**



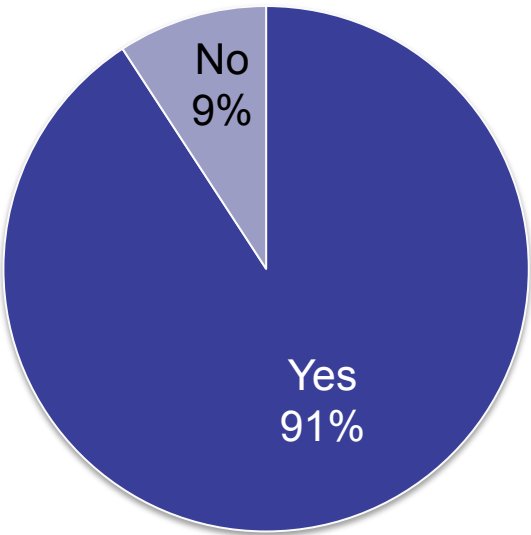
**Netbook ownership**



# Internet Service in the Home

*Do you currently have Internet service in your home?*

❑ The majority of residents (91%) have Internet service in their home.



	TOTAL	Male	Female	18-34	35-44	45-54	55-64	65+
Yes	91%	86%	96%	91%	87%	89%	94%	94%
No	9%	14%	4%	9%	13%	11%	6%	6%

# No Internet Service in the Home/ Likelihood to get Internet

*Why do you not have Internet service in your home? (N=33, multiple responses accepted)*

☐ Just over one quarter of residents (27%) without Internet service said they do not need it.

Can live without it/ don't need it	27%
Cannot afford it/ too expensive	18%
Use it at work	16%
Not enough people in household using it	9%
Don't use technology	9%
Too old	9%
Not computer literate	5%
Misc.	7%

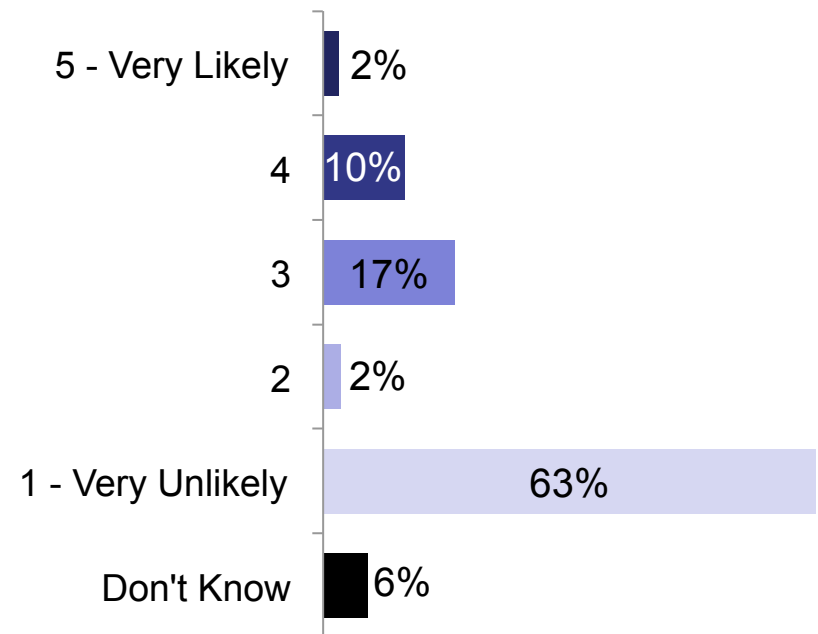
## **Typical verbatim responses:**

*"I have it at work so I'm not going to pay for it at home."*

*"Cannot afford Internet; it costs too much money."*

***On a scale of 1 to 5, with 5 being Very Likely and 1 being Very Unlikely, how likely are you to get Internet service in your home in the next 6 months?***

☐ Twelve percent of residents without Internet service are likely to get it in the next 6 months.

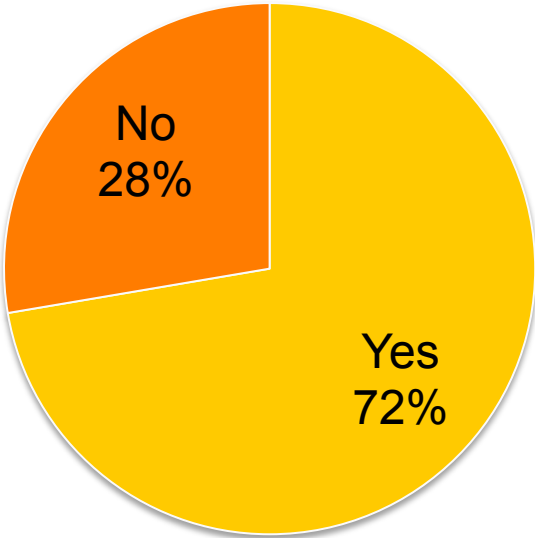




# Knowledge of the term “Broadband”

*Do you know what “Broadband” means?*

- ❑ Close to three quarters of residents (72%) know what “Broadband” means.
- ❑ Adults aged 55 and over are less likely to know what broadband means than those aged 54 and under.



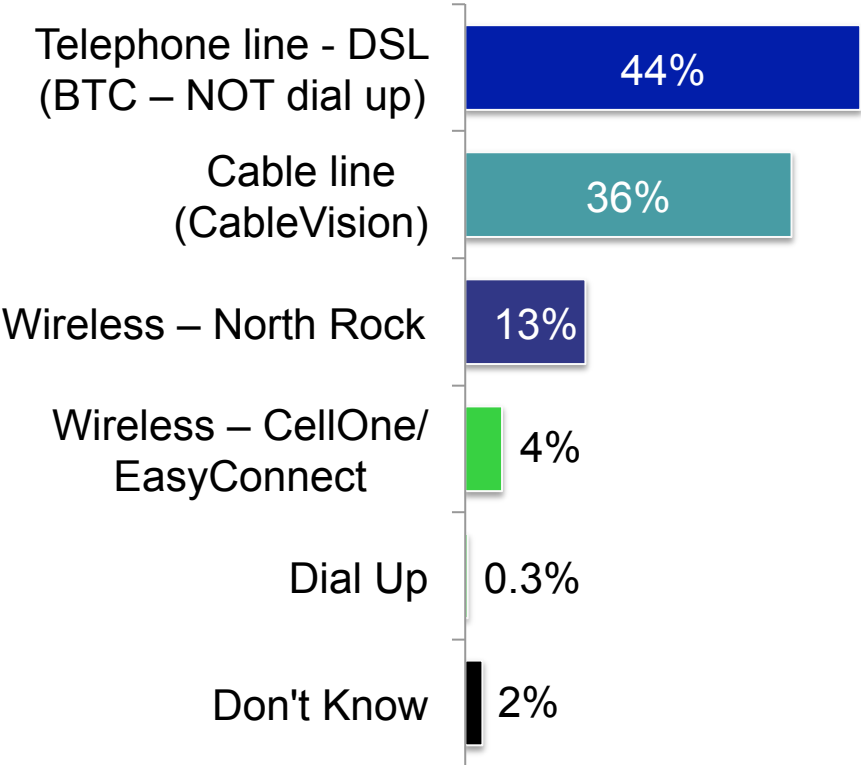
	TOTAL	Male	Female	18-34	35-44	45-54	55-64	65+
Yes	72%	80%	65%	83%	71%	84%	60%	50%
No	28%	20%	35%	17%	29%	16%	40%	50%

# Internet Access and Service Providers

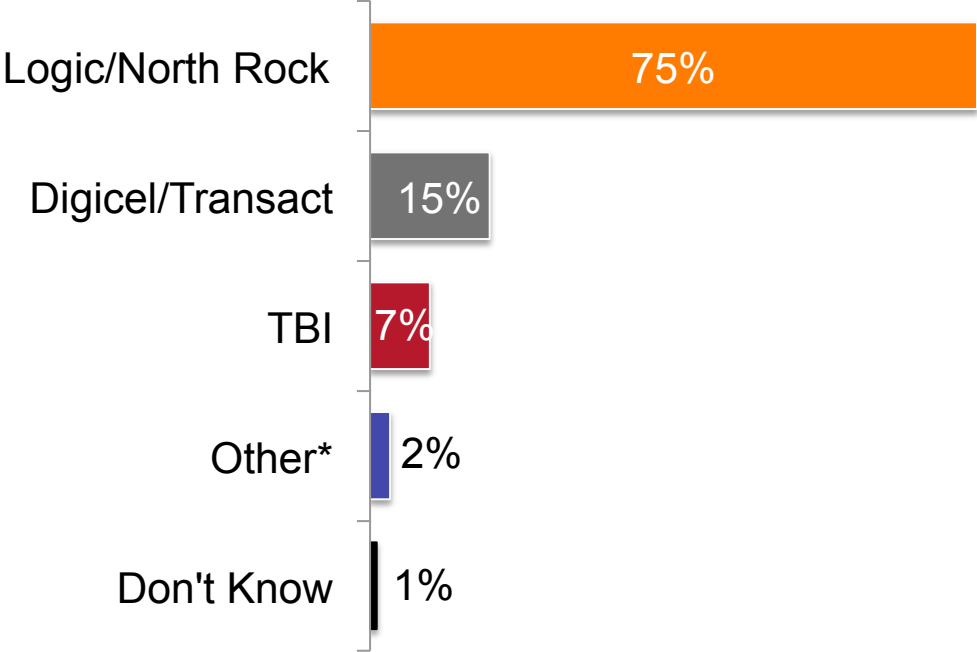
*Does your Internet access come through your/ Who is your Internet Service Provider?*

- ❑ The majority of residents have DSL (44%) or Cable line (36%) Internet access.
- ❑ Three quarters of residents (75%) use Logic/North Rock as their ISP.

Internet Access Provider



Internet Service Provider



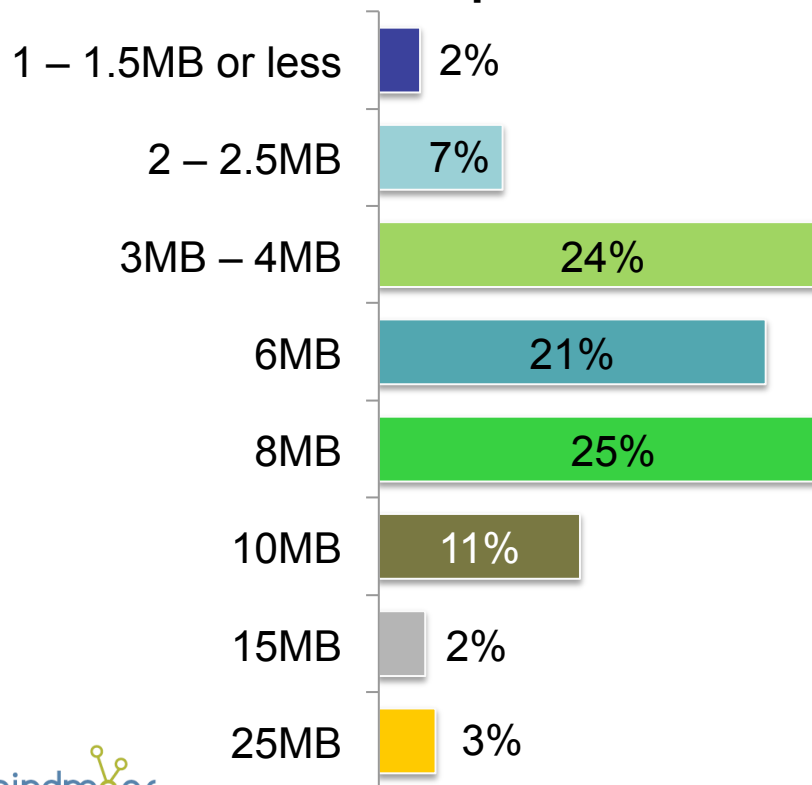
*\*Other responses: CableVision; CellOne.*

# Download Speeds

*What download speed do you have?*

- ❑ Seventy percent of residents have download speeds between 3MB and 8MB (3MB-4MB 24%, 6MB 21%, 8MB 25%).
- ❑ Only 5% have download speeds greater than 15MB. Logic/North Rock customers (7%) are more likely to have higher speeds than Digicel/Transact or TBI customers (4% each).

**Download Speed**



	TOTAL	Digicel/ Transact	Logic/ North Rock	TBI
1 – 1.5MB or less	2%	-	3%	-
2 – 2.5MB	7%	4%	4%	14%
3MB – 4MB	24%	22%	24%	29%
6MB	21%	30%	21%	7%
8MB	25%	30%	24%	25%
10MB	11%	7%	11%	21%
15MB	2%	4%	3%	-
25MB	3%	-	4%	4%
Don't Know	6%	4%	7%	-

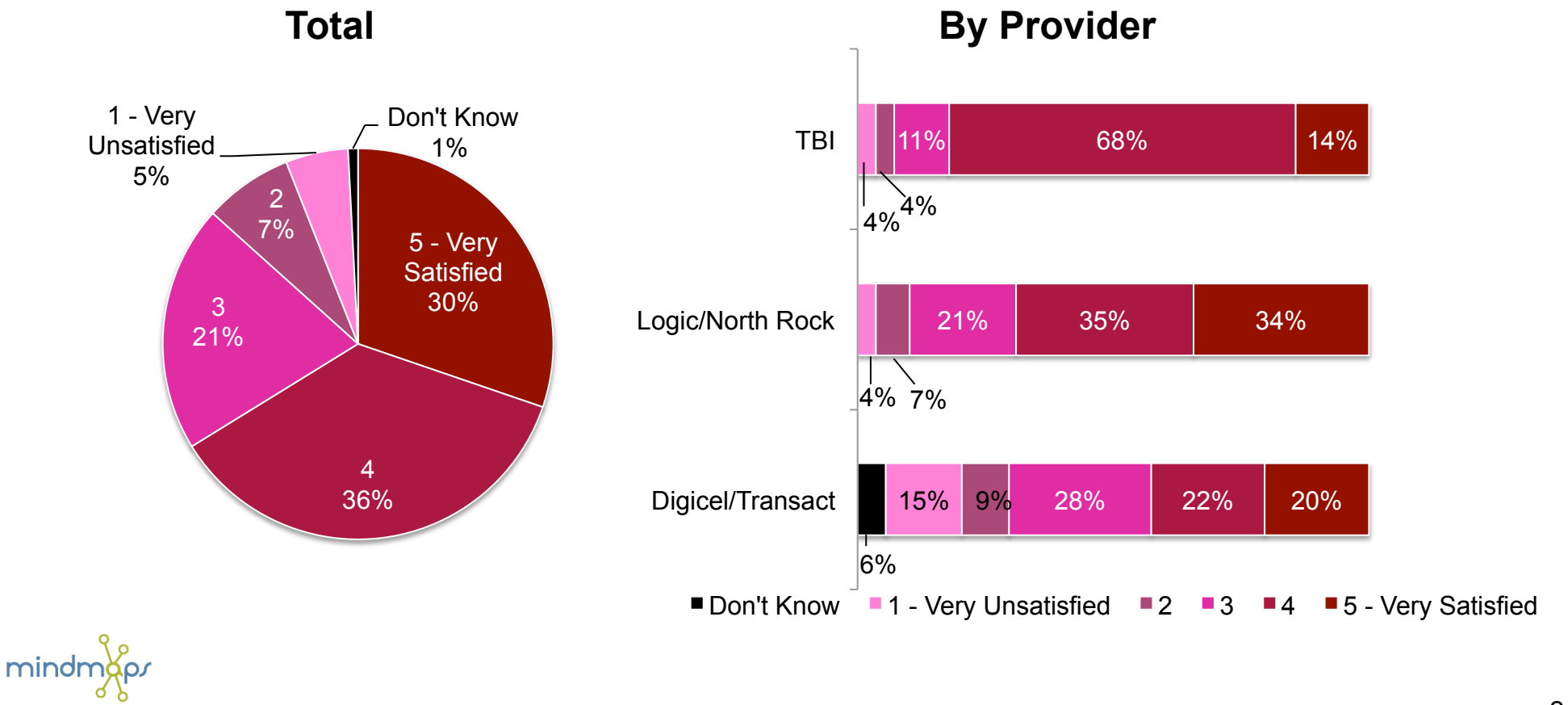


## **Internet Speed & Cost**

# Satisfaction with Speed of Internet Service

*On a scale of 1 to 5, with 5 being Very Satisfied and 1 being Very Unsatisfied, how satisfied are you with the speed of your Internet service?*

- ❑ Sixty-six percent of residents are satisfied with their Internet speed.
- ❑ TBI customers (82%) are more likely to be satisfied with their Internet speed compared to Logic/North Rock customers (69%) and Digicel/Transact (43%).



# Satisfaction with Speed of Internet Service – Cont' d

- ❑ Generally, the faster the download speed, the more satisfied residents are with their Internet speed (100% of 25MB customers are satisfied).
- ❑ Residents with the lowest speed of 1 – 1.5MB or less are more likely to say they are very unsatisfied with their Internet download speed (38%).

	TOTAL	1 – 1.5MB or less	2 – 2.5MB	3MB – 4MB	6MB	8MB	10MB	15MB	25MB
<b>Top 2</b>	<b>66%</b>	<b>50%</b>	<b>75%</b>	<b>69%</b>	<b>48%</b>	<b>70%</b>	<b>78%</b>	<b>78%</b>	<b>100%</b>
5 - Very Satisfied	30%	38%	21%	30%	13%	28%	43%	44%	91%
4	36%	13%	54%	40%	35%	41%	35%	33%	9%
3	20%	-	4%	19%	42%	12%	18%	22%	-
2	7%	13%	21%	6%	3%	11%	5%	-	-
1 - Very Unsatisfied	5%	38%	-	6%	4%	8%	-	-	-
Don't Know	1%	-	-	-	4%	-	-	-	-

**Why do you say that you are unsatisfied with your Internet speed? (N = 106, multiple responses accepted)**

Internet runs slow	50%	Not receiving speed that has been paid for	5%
Too expensive for what is offered	19%	Download speed too slow	4%
Not consistent/reliable	13%	Not a secure connection	1%

## Typical verbatim responses:

*"It runs really slow and is very inconsistent. It does not run properly all the time and is frustrating to spend all this money for a service that does not work all the time."*

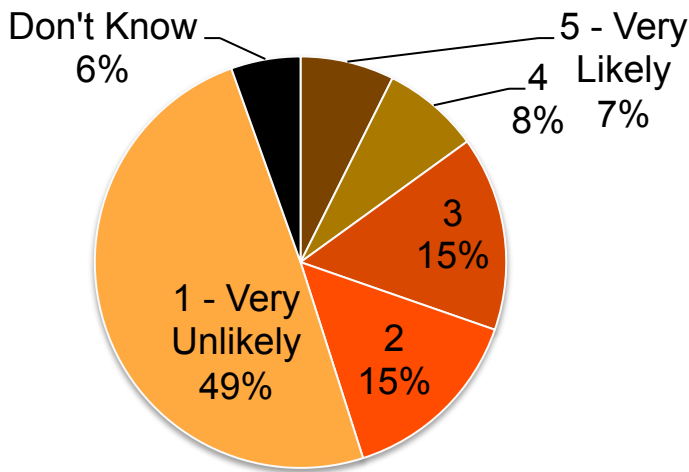
*"We are not getting what we are paying for!"*

*"Drops constantly particularly when I REALLY need it!!! During peak hours it is really slow."*

# Likelihood to Upgrade Speed

On a scale of 1 to 5, with 5 being Very Likely and 1 Being Very Unlikely, how likely are you to upgrade your Internet speed in the next 6 months?

❑ Fifteen percent of residents are likely to upgrade their speed in the next six months.



	TOTAL	1 – 1.5MB or less	2 – 2.5MB	3MB – 4MB	6MB	8MB	10MB	15MB	25MB
TOP 2	15%	25%	12%	13%	20%	16%	18%	-	-
5 - Very Likely	7%	13%	4%	6%	7%	11%	13%	-	-
4	8%	13%	8%	7%	14%	5%	5%	-	-
3	15%	-	4%	21%	16%	16%	23%	-	-
2	15%	38%	4%	7%	14%	20%	20%	33%	-
1 - Very Unlikely	49%	38%	80%	56%	32%	46%	38%	56%	100%
Don't Know	5%	-	-	3%	18%	2%	3%	11%	-



# Likelihood to Upgrade Speed Cont' d

*Why do you say that you are [LIKELY/NOT LIKELY] to upgrade your speed?*

## **LIKELY to upgrade speed (N = 50, multiple responses accepted)**

Improve speed	47%
Improve overall service	19%
I upgrade regularly	11%
If available for reasonable cost	11%
Happy with providers	6%
Upgrade is due	4%
Misc.	2%

### **Typical verbatim responses:**

*"Because what I have right now does not work all the time. If I upgrade to another package it might work better."*

*"Because I am not satisfied with my current speed."*

*"If there is an upgrade, I always get it."*

## **NOT LIKELY to upgrade speed (N = 262, multiple responses accepted)**

Happy with current speed/service	42%
Too costly	26%
Not a priority	12%
Recently upgraded	6%
Lack of faith in service reliability and speed	4%
Already have highest speed	4%
Not in control of account upgrades	3%
Considering other service providers	2%

### **Typical verbatim responses:**

*"It is not a priority right now being that it is so expensive."*

*"It all depends: if the prices go down, then we might think about it."*

*"We upgraded recently and are happy with it at this time."*

*"We are satisfied with the speed and have no need to upgrade."*

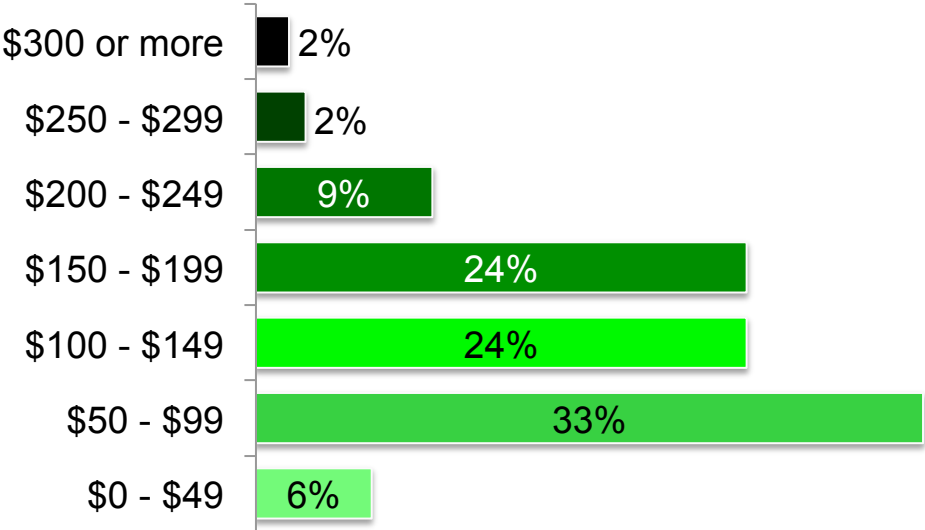


# Average Monthly Internet Expenditure

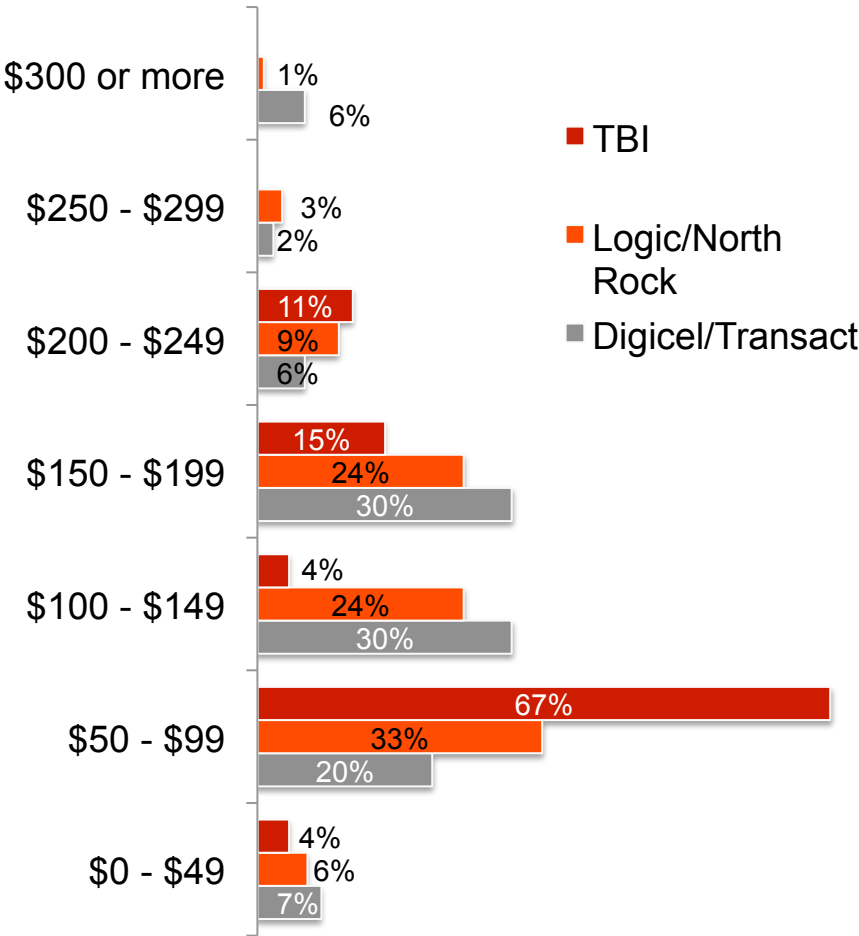
*Approximately how much do you spend per month on your Internet access and service? Include your access - DSL, Cable etc. - as well as your Internet service.*

- ❑ Thirty-nine percent of residents spend less than \$99 per month on Internet.
- ❑ TBI customers (71%) are more likely to spend less than \$99 per month.

Total



By Provider

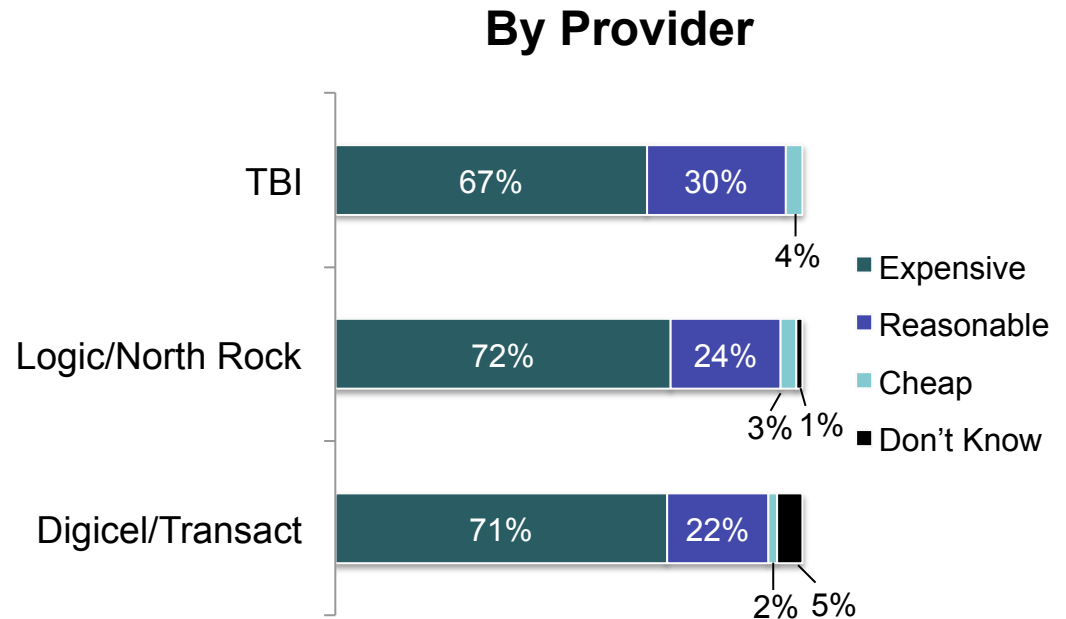
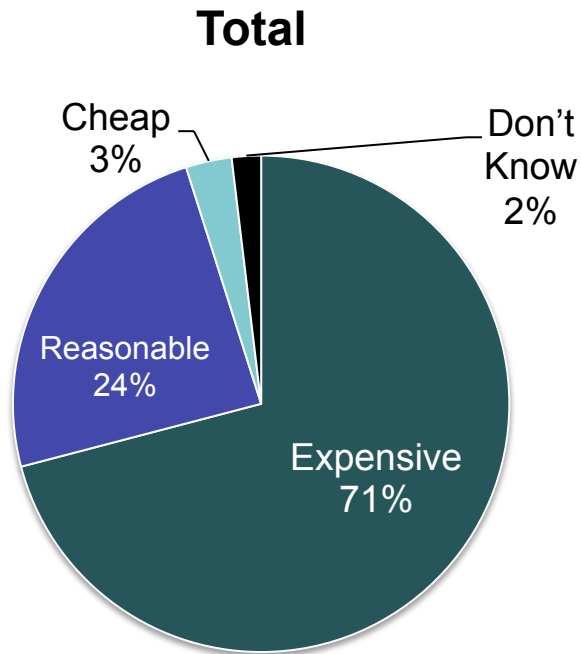


Average Monthly Expenditure	
TOTAL	\$121.93
Digicel/Transact	\$130.45
Logic/North Rock	\$122.01
TBI	\$96.88

# Perceptions of Bermuda Internet Expenditure

*In the context of Bermuda, where the cost of goods and services is generally higher than in North America or Europe, do you consider the price you are paying for Internet access and service to be [Expensive/Reasonable/Cheap]?*

❑ The majority of residents (71%) think that the cost of Internet access and service in Bermuda is expensive.



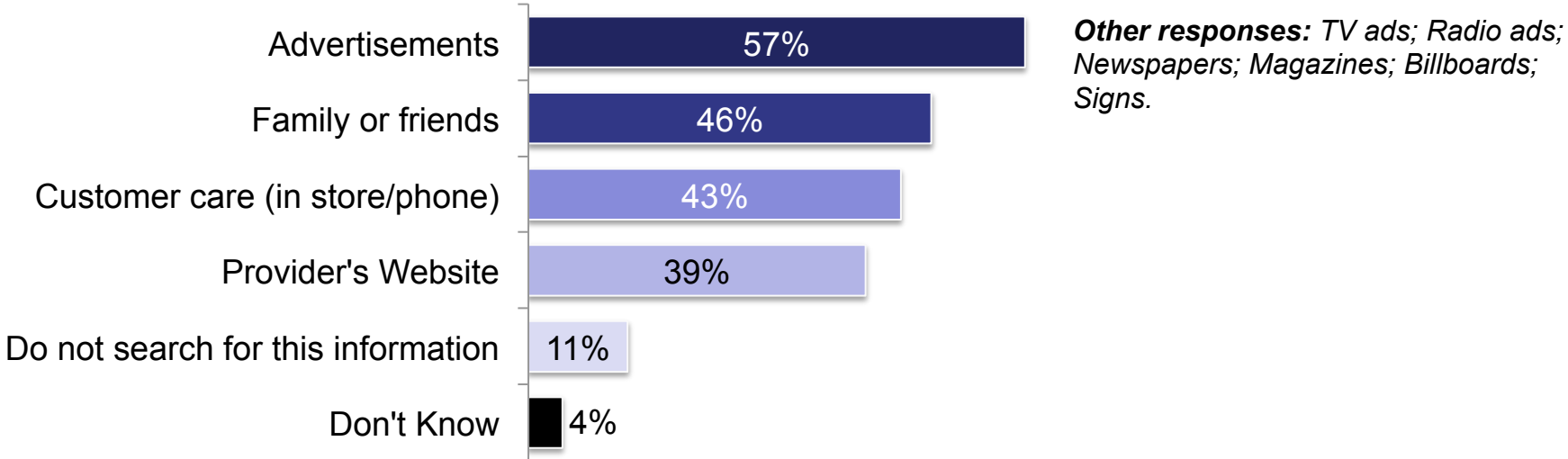
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## **Information on Internet Service**

# Information Source for Internet Service and Pricing

*Where do you usually get information regarding Internet service and pricing?  
[Respondents could select multiple sources]*

❑ Bermuda residents receive information regarding Internet service and pricing from advertisements (57%), family or friends (46%), customer care (43%) and providers' websites (39%).

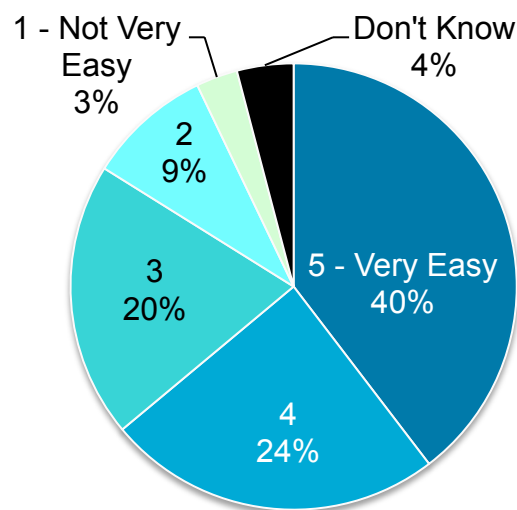


	TOTAL	Male	Female	18-34	35-44	44-54	55-64	65+
Advertisements	57%	57%	57%	57%	63%	64%	57%	46%
Family or friends	46%	43%	49%	48%	60%	53%	35%	38%
Customer care (in store/phone)	43%	48%	39%	34%	47%	61%	41%	38%
Providers' Websites	39%	43%	35%	29%	49%	51%	49%	26%
Do not search for this information	11%	7%	15%	15%	2%	5%	15%	15%
Don't Know	4%	6%	2%	6%	5%	5%	1%	-

# Ease of Selecting an Internet Service based on Information

On a scale of 1 to 5, with 5 being Very Easy and 1 being Not Very Easy, how easy is it to choose an Internet service based on the information you found?

❑ Sixty-four percent of residents think it is easy to select an Internet service based on the information available.



	TOTAL	Male	Female	18-34	35-44	45-54	55-64	65+
TOP 2	64%	63%	64%	62%	76%	73%	68%	46%
5 - Very Easy	40%	35%	43%	41%	41%	51%	38%	24%
4	24%	28%	21%	21%	34%	22%	30%	22%
3	20%	24%	16%	21%	20%	18%	17%	22%
2	9%	7%	11%	13%	2%	5%	5%	14%
1 - Not Very Easy	3%	3%	3%	-	-	3%	5%	10%
Don't Know	4%	2%	6%	4%	2%	1%	5%	8%



## **Internet Service & Access**

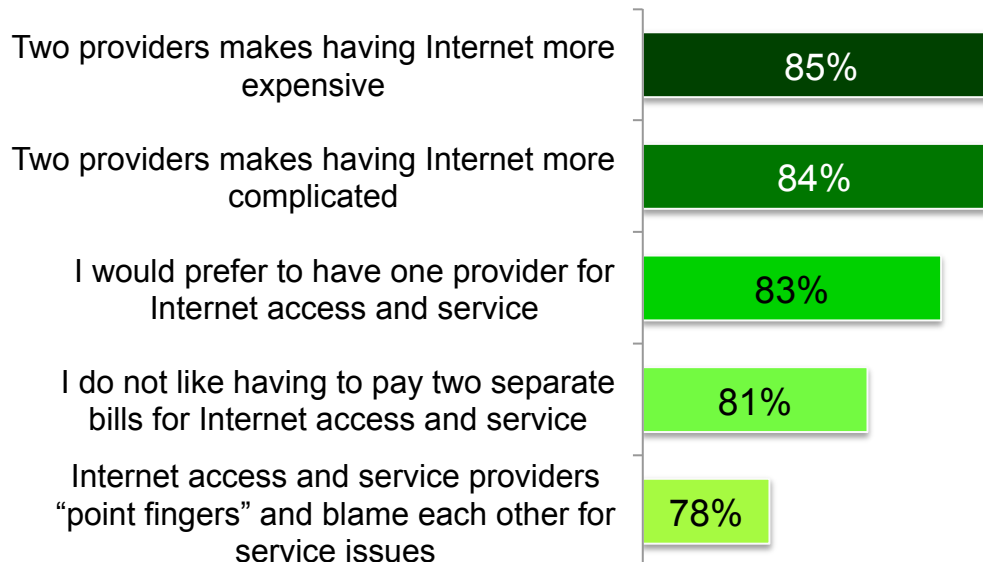
# Opinions on having an Internet Access & Service Provider

*In Bermuda prior to April 30, 2013, in order to access the Internet you needed both an Internet Access Provider such as BTC or CableVision, and an Internet Service Provider, such as Logic, Digicel/Transact, North Rock or TBI.*

*On a scale of 1 to 5, with 5 being Completely Agree and 1 being Do Not Agree at All, how much do you agree with the following statements:*

❑ Residents generally agree that having both an Internet access and service provider is more expensive (85%), more complicated (84%) and they would prefer to have only one provider (83%) and one bill (81%).

## Top 2 Responses



# Opinions on having an Internet Access & Service Provider Cont' d

*Are there any other issues you see with having both an Internet Access and Internet Service Provider? (N = 96, multiple responses accepted)*

❑ Residents find having two suppliers to be annoying (35%) and it takes longer to resolve issues (15%).

Unnecessary/annoying to deal with two providers	35%		Setting up with two different companies is tedious	6%
Resolving issues takes longer/frustrating customer service	15%		Harder to tell where a problem lies/less accountability	6%
Harder to manage bills	14%		When one provider is down you still have to pay the other (even if not receiving the service)	1%
No issues/ I like the idea of two separate entities	13%		Misc.	4%
Cost	7%			

## **Typical verbatim responses:**

*"It results in too many gaps in communication and backwards resolution."*

*"Yes I believe that it would be better for accountability and overall service to have one internet access and internet service provider."*

*"When you set up your internet you have to deal with 2 companies which takes a while; it's a pain and it's time consuming."*

*"Too many people to deal with means too many things can go wrong. I find it gets to be a problem sometimes."*





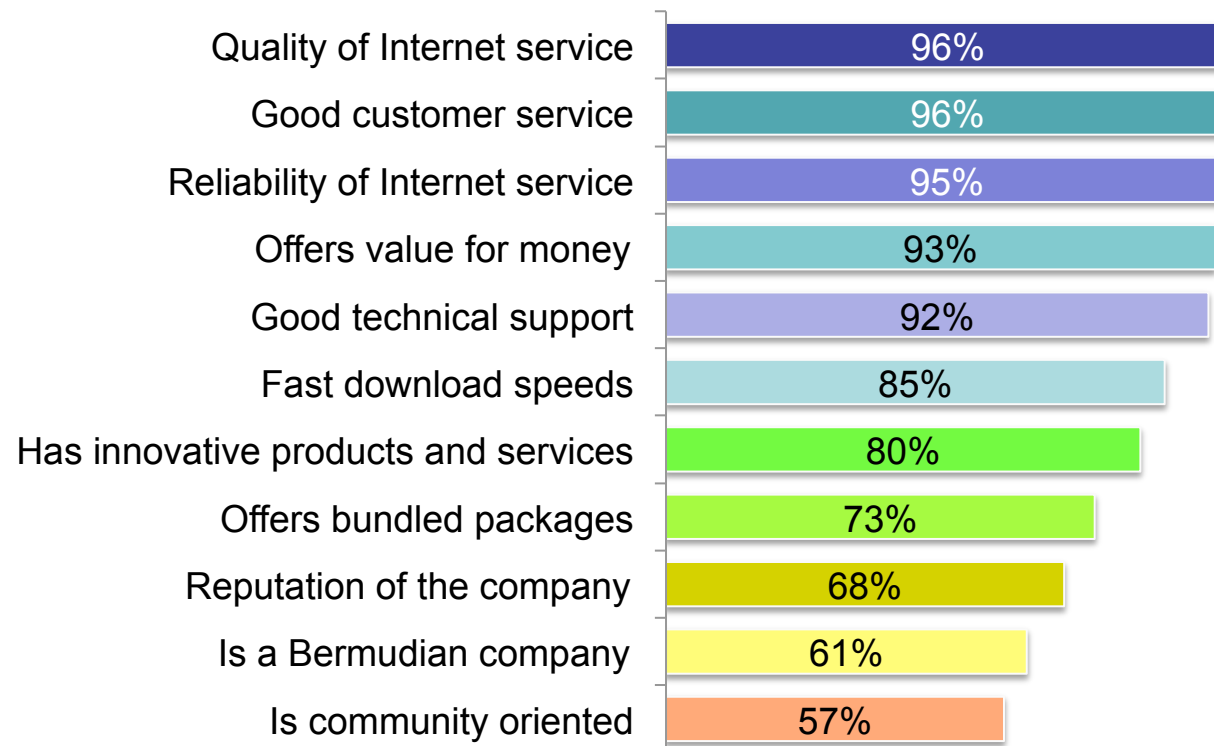
# **Internet Service Provider Importance Factors**

# Important Factors when Deciding on an Internet Service Provider

*On a scale of 1 to 5, with 5 being Very Important and 1 being Very Unimportant, how important are the following factors when deciding upon an Internet service provider?*

❑ Quality of service (96%), customer service (96%) and reliability (95%) are the three most important factors when deciding upon an Internet Service Provider.

## Top 2 Responses



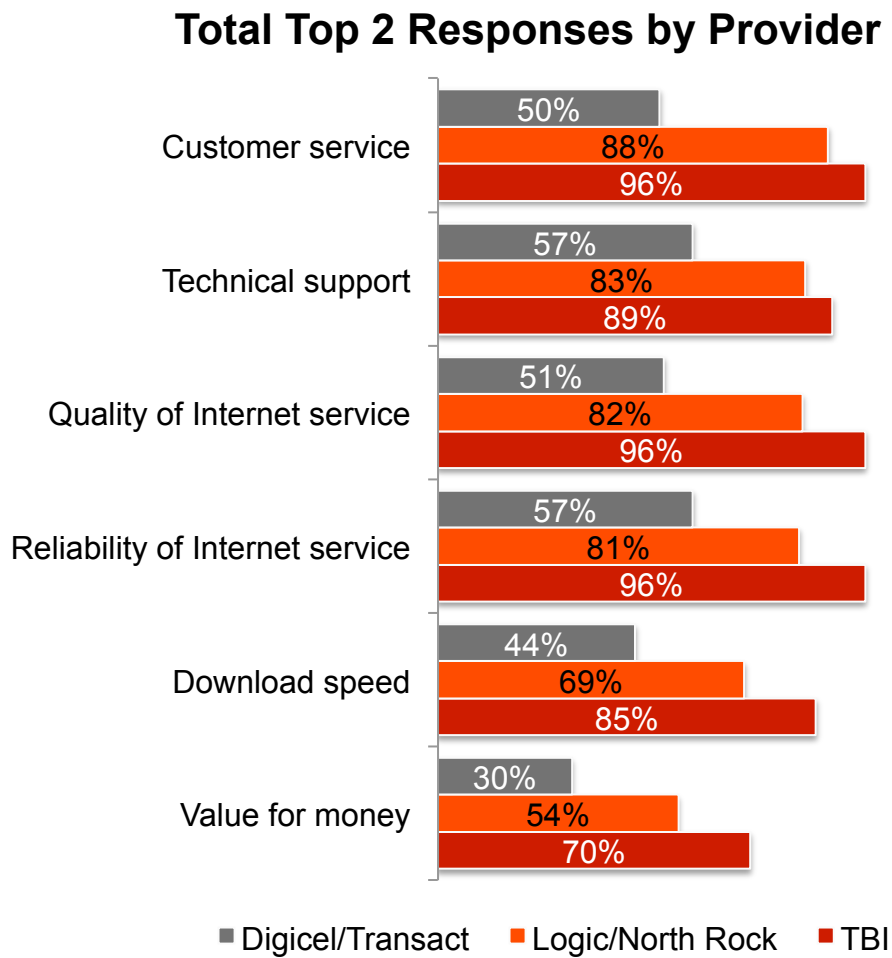
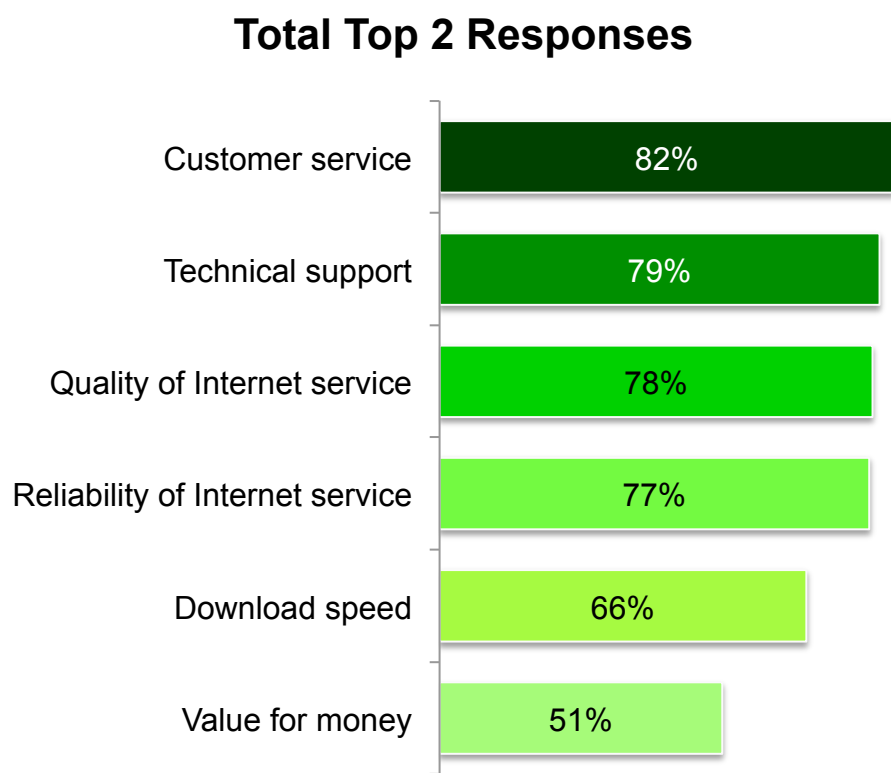


## **Satisfaction & Likelihood to Switch**

# Satisfaction with Internet Provider Attributes

On a scale of 1 to 5, with 5 being Very Satisfied and 1 being Very Unsatisfied, how satisfied are you with your Internet service provider's . . .

- ❑ Residents are most satisfied with their Internet Service Provider's customer service (82%), technical support (79%), quality (78%) and reliability (77%) of Internet service.
- ❑ TBI customers are the most satisfied.

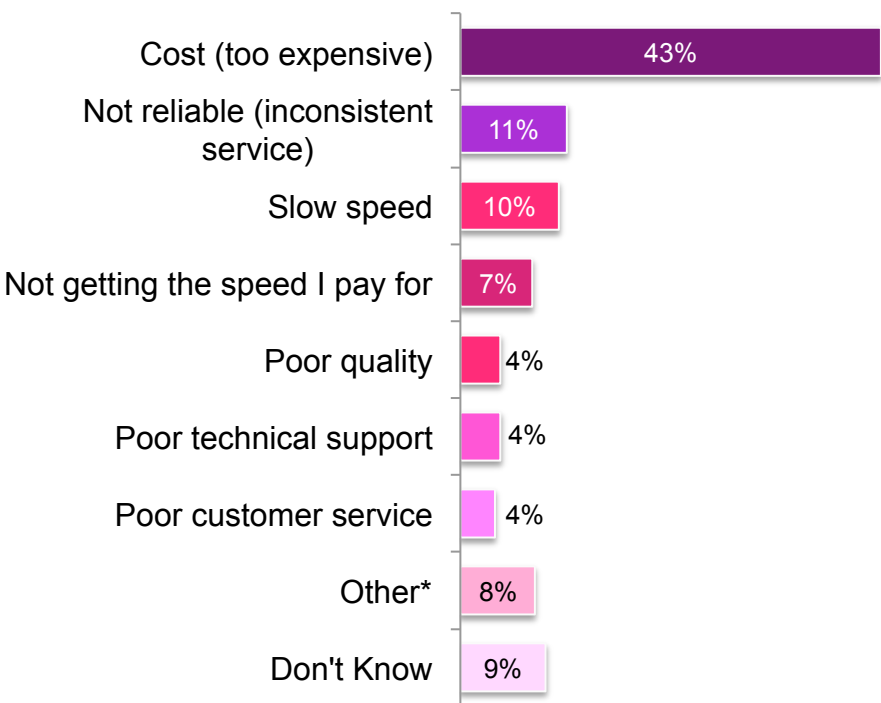


# Number One Issue with Internet Service

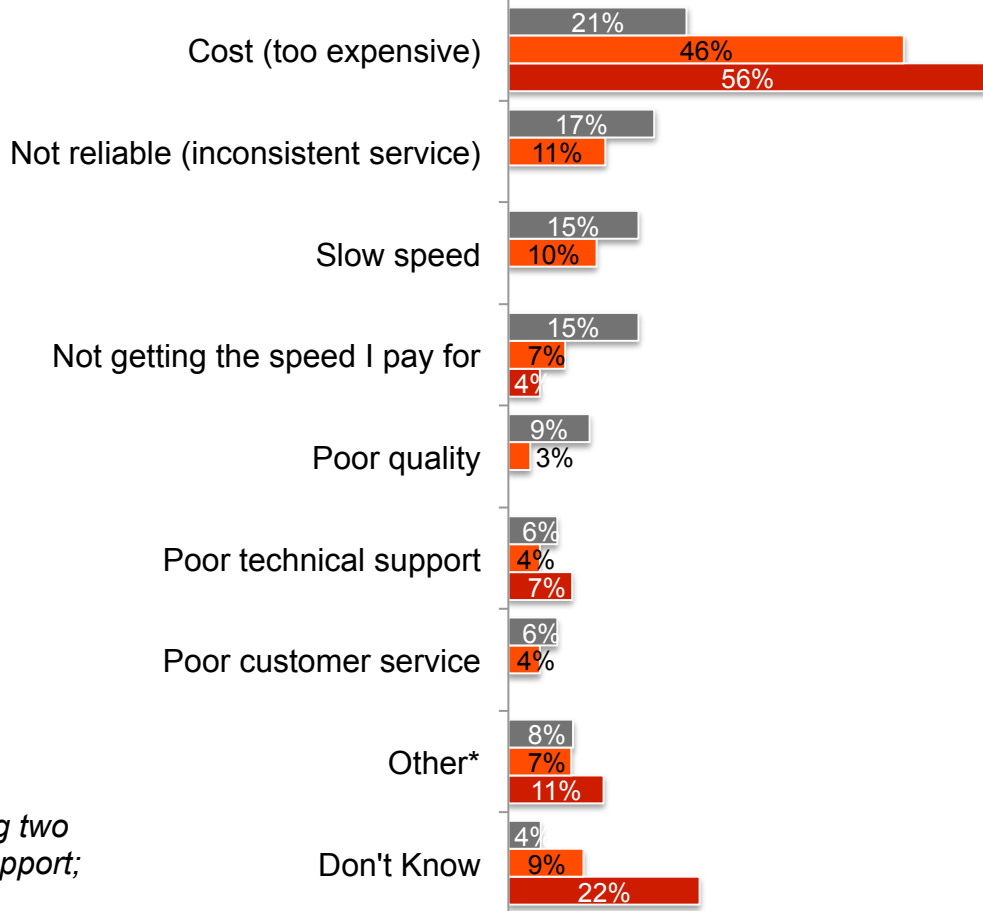
What is the **number one** issue that you have with your Internet service?

- ❑ Cost (43%) is the number one issue for residents.
- ❑ TBI customers (56%) are more likely to think cost is the number one issue with Internet service.

Total Top 2 Responses



Total Top 2 Responses by Provider



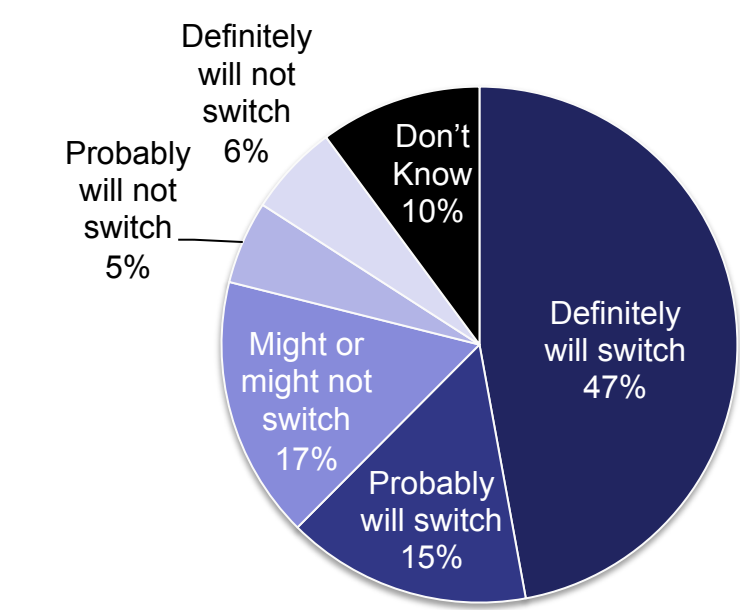
*\*Other responses: No issues; slow download speeds; having two providers; poor signal quality; cannot understand technical support; more bundles; virus control.*



# Likelihood to Switch with 20% Decrease in Cost

*If the cost of your monthly Internet service could decrease by 20% if you switch to another provider, would you say that you [Definitely will switch, Probably will switch . . .]*

❑ Sixty-two percent of residents would switch providers if the monthly cost of Internet service could decrease by 20%.



**Why would you not switch Internet Service Providers?  
(N = 104, multiple responses accepted)**

Happy with provider	33%
Not unless there is a better service/offer elsewhere	21%
Other service providers may not be any better	12%
I do not want to change my email address	8%
Loyalty	7%
I would have to do my research first	6%
Too much hassle/time to switch	5%
Not a priority	2%
Misc.	5%

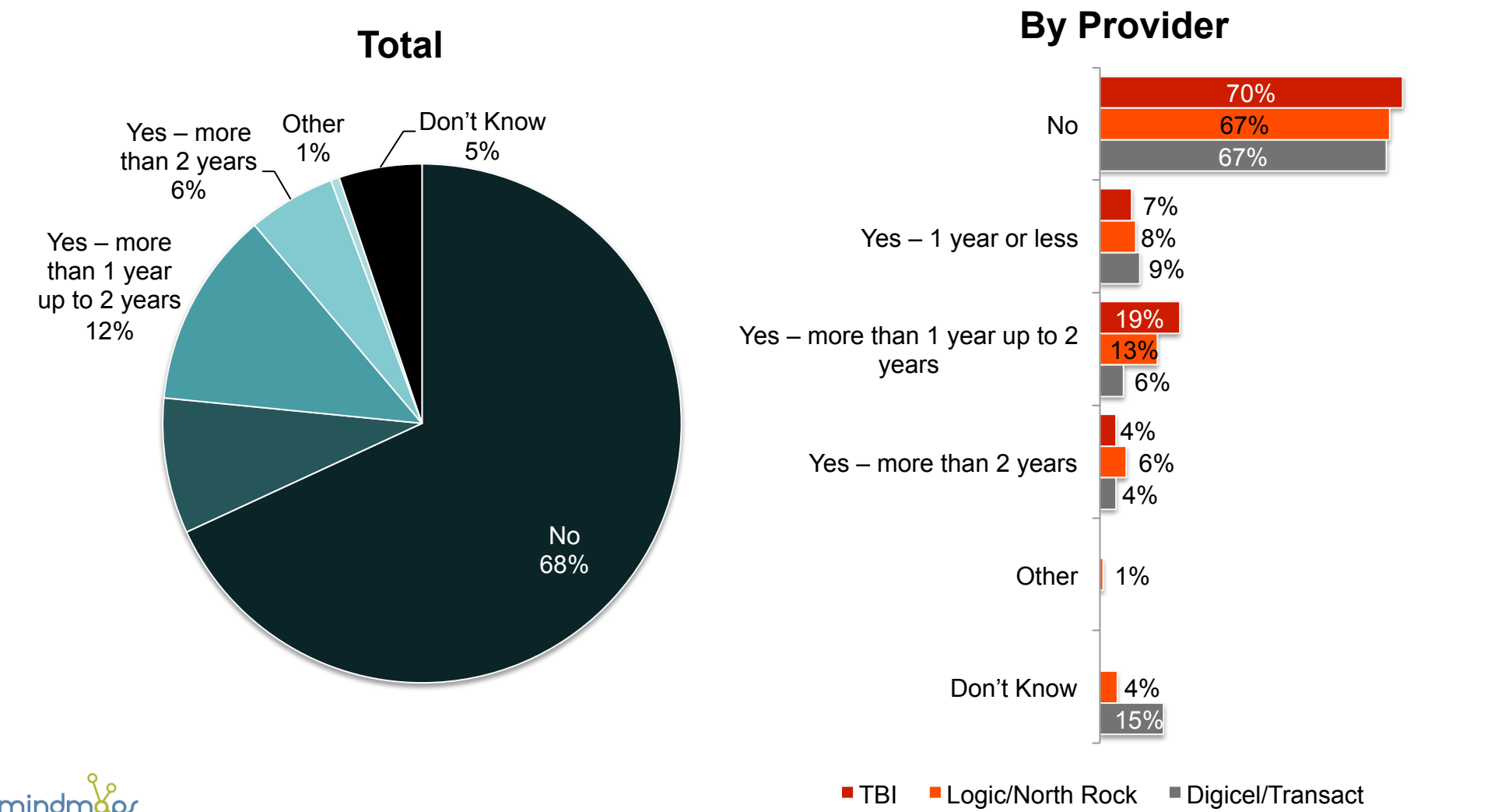


	TOTAL	Male	Female	18-34	35-44	45-54	55-64	65+
<b>TOP 2</b>	<b>62%</b>	<b>60%</b>	<b>64%</b>	<b>69%</b>	<b>61%</b>	<b>62%</b>	<b>63%</b>	<b>52%</b>
Definitely will switch	47%	44%	49%	60%	46%	44%	37%	34%
Probably will switch	15%	16%	15%	9%	15%	18%	25%	17%
Might or might not switch	16%	17%	16%	19%	7%	14%	19%	19%
Probably will not switch	5%	5%	6%	4%	-	6%	8%	6%
Definitely will not switch	6%	5%	7%	4%	7%	4%	5%	11%
Don't Know	10%	13%	7%	4%	24%	13%	5%	13%

# Contract with Internet Service Provider

*Do you have a contract with your Internet service provider? If yes, what is the total contract period?*

❑ The majority of residents (68%) do not have a contract with their ISP.

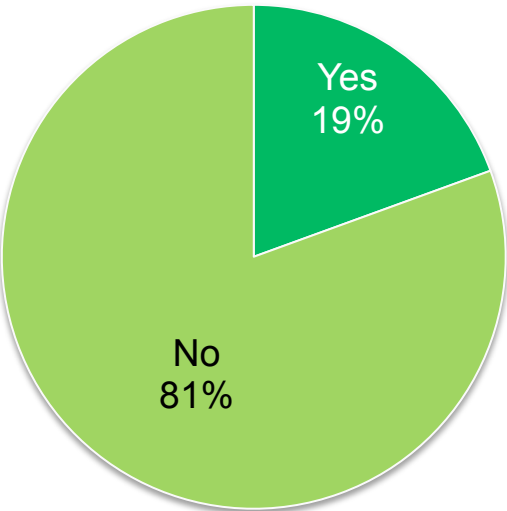


# Switched in the Last 2 Years

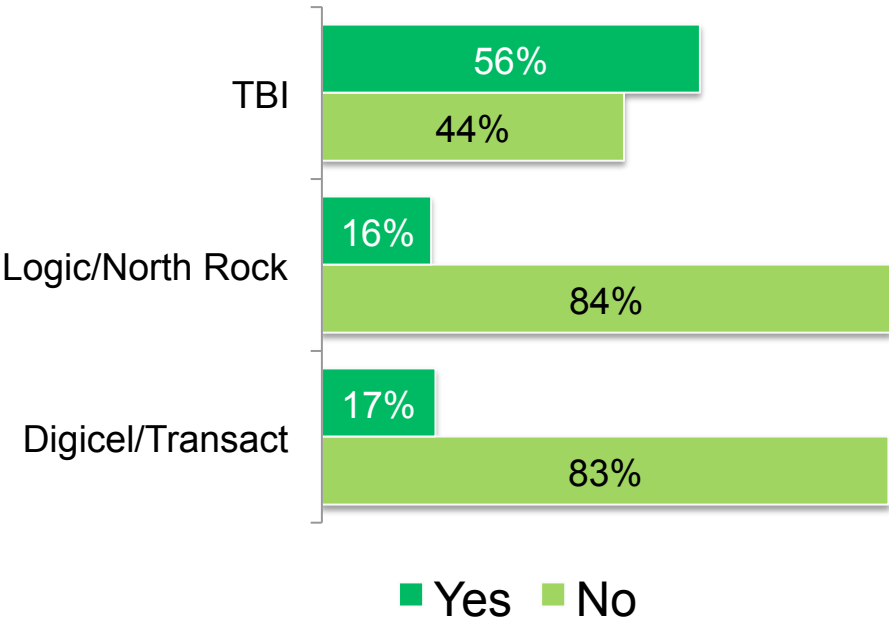
*Have you switched Internet service providers in the past 2 years?*

- ❑ Nineteen percent of residents have switched Internet Service Providers in the past 2 years.
- ❑ TBI customers (56%) are more likely to have switched providers in the last 2 years.

Total



By Provider

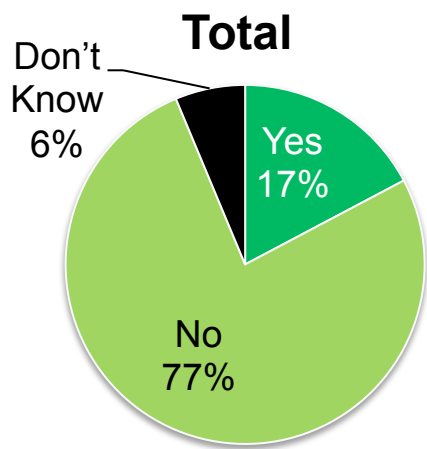




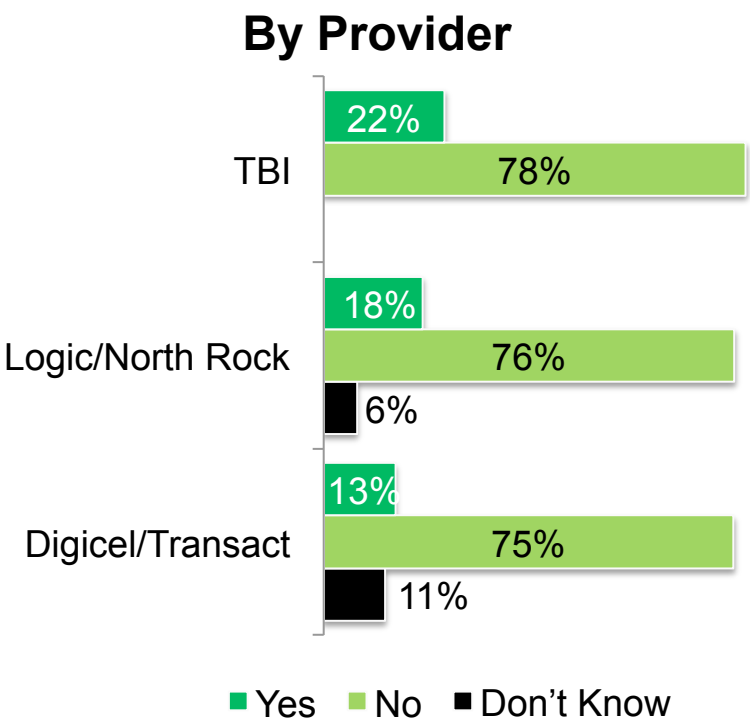
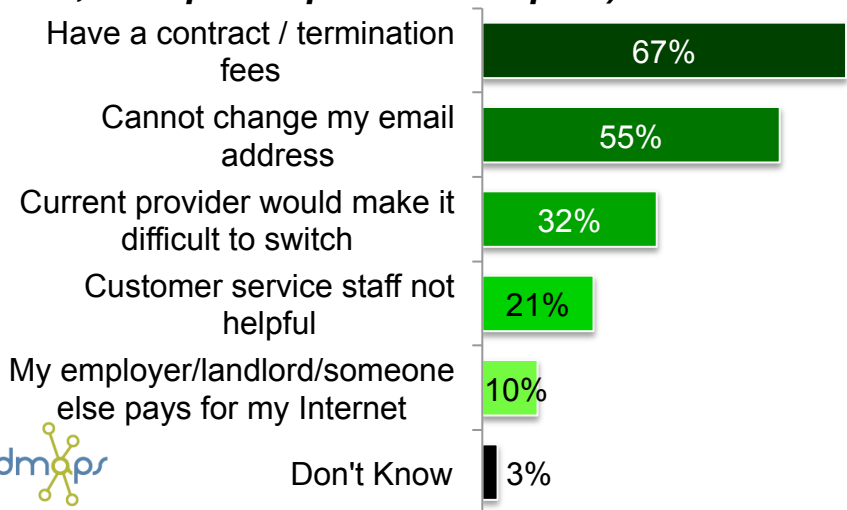
# Difficulty in Switching Internet Service

*Do you think it is difficult to switch Internet service?*

❑ Just over three quarters of residents (77%) do not think it is difficult to switch Internet Service Providers.



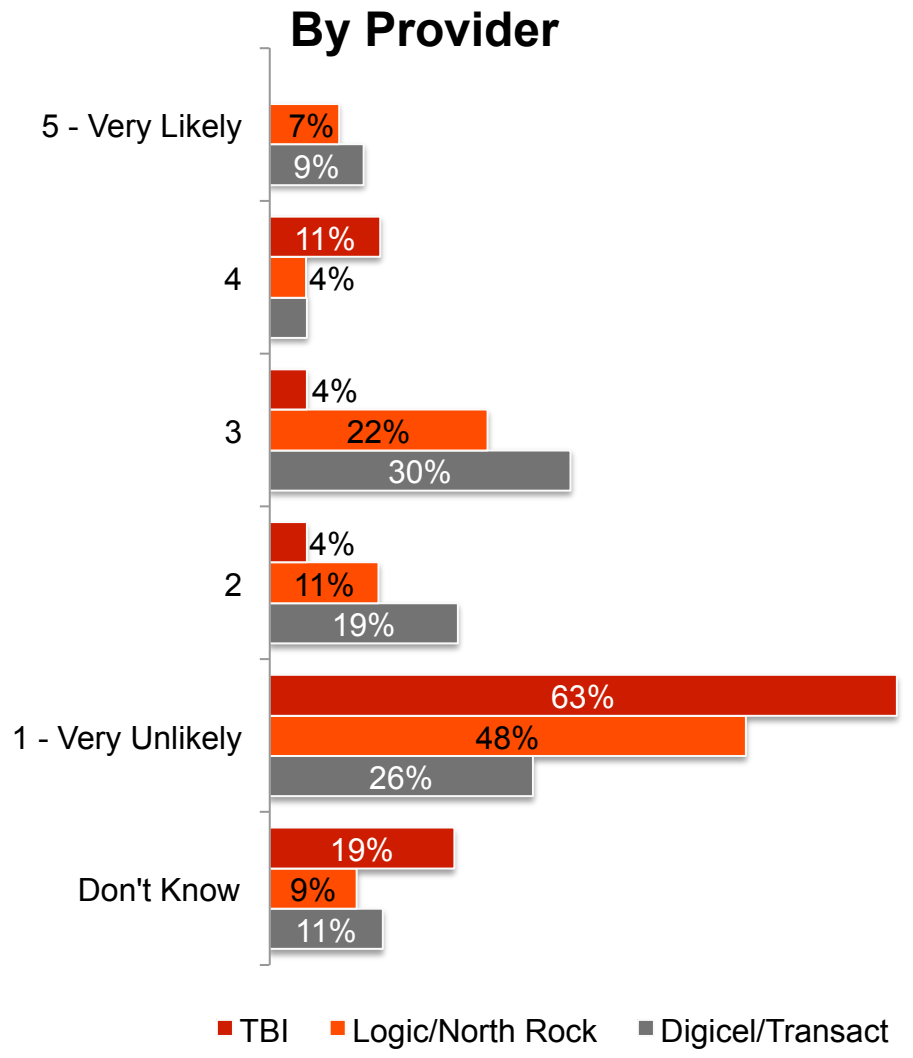
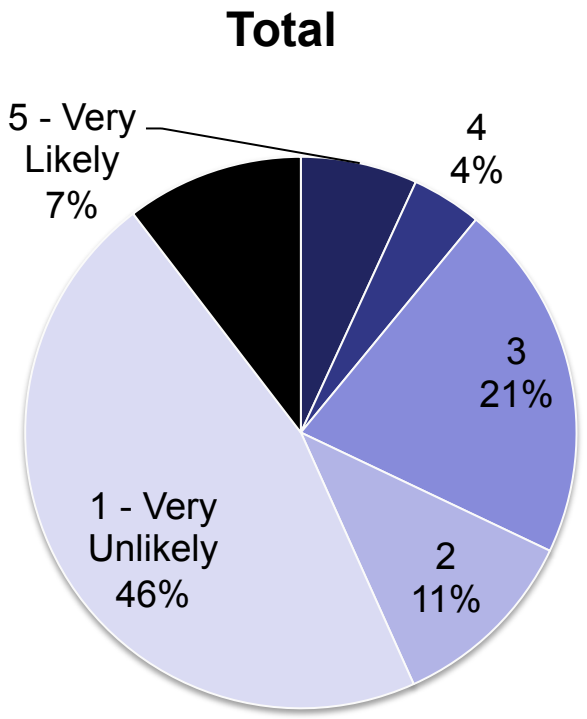
**Why do you think it is difficult to switch Internet service?**  
(N = 45, multiple responses accepted)



# Likelihood to Switch Providers in next 6 months

*On a scale of 1 to 5, with 5 being Very Likely and 1 being Very Unlikely, how likely are you to switch Internet service providers in the next 6 months?*

❑ Eleven percent of residents are likely to switch providers in the next 6 months.



# Likelihood to Switch Providers in next 6 months Cont' d

*Why do you say that you are [LIKELY/NOT LIKELY] to switch Internet service providers?*

## LIKELY to Switch (N = 48, multiple responses accepted)

Unhappy with speed and service of current provider	38%
Cheaper rates elsewhere	31%
Better value for money elsewhere	10%
Current provider is too expensive	10%
I'm not getting the speed I am paying for	5%
I want to try other providers	3%
Misc.	2%

### Typical verbatim responses:

*"Our services have been going down the last few months and they won't resolve the issues, so we will be looking elsewhere."*

*"It is too expensive so if I can find the same product for cheaper, I will switch."*

*"Well let's put it like this: if I could get more speed for the price I already pay, I would switch in a minute."*

*"I am tired of dealing with my provider when I have problems. They just don't care about my business."*

## UNLIKELY to Switch (N = 241, multiple responses accepted)

Happy with provider	48%
Not unless there is a better offer elsewhere	19%
Not a priority	8%
Just recently switched	5.5%
Every service provider is the same	4%
I don't want to change my email address	4%
I don't control my internet account	4%
Too much hassle/time to switch providers	3.5%
Loyalty to current provider	2%
In a contract	0.5%
Misc.	2%

### Typical verbatim responses:

*"I am a long time customer and the service has always been great here."*

*"Unless someone gives me a great deal I will stay right here."*

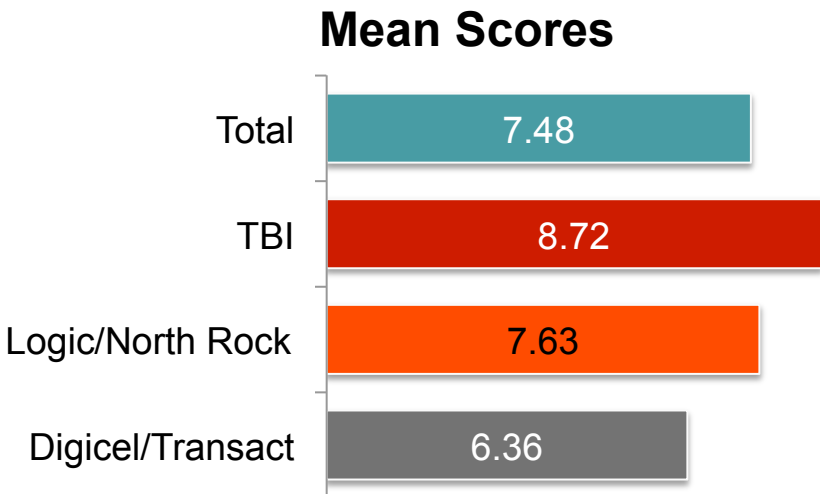
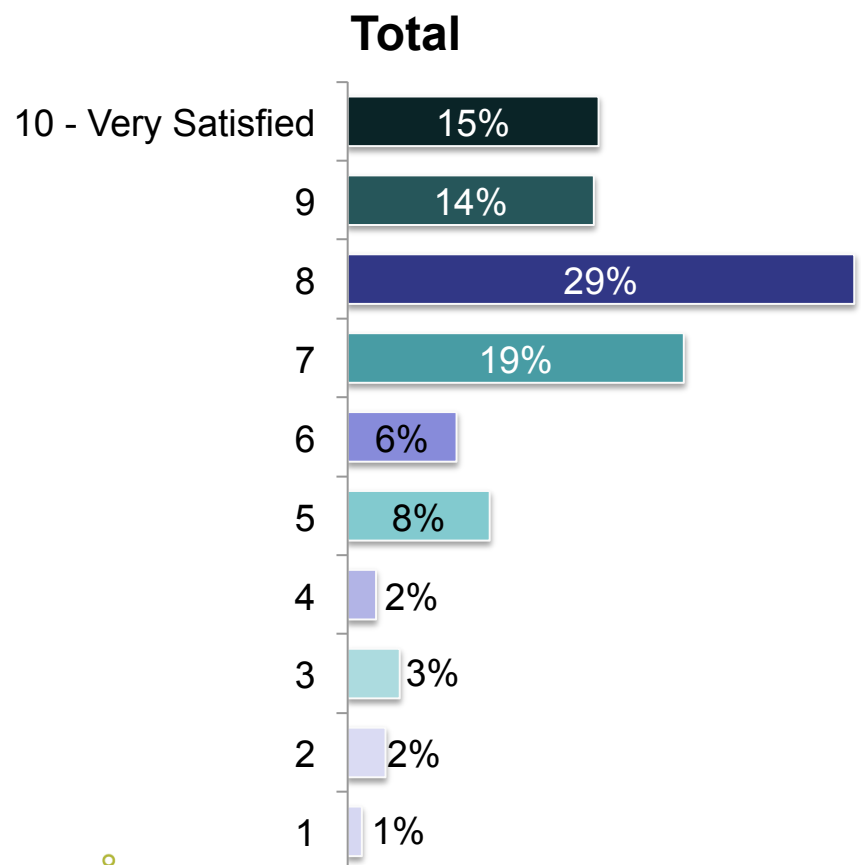
*"It is not an immediate need, and if we switch we have to change our email address."*

*"It will not help. They are all the same."*

# Satisfaction with Internet Service Provider

*On a scale of 0 to 10, with 10 being Very Satisfied and 0 being Very Unsatisfied, how satisfied are you with your Internet service provider?*

- ❑ Twenty-nine percent of residents are satisfied with their Internet Service Provider.
- ❑ TBI customers (Mean = 8.72) are more likely to be satisfied compared to Logic/ North Rock customers (7.63) or Digicel/Transact customers (6.36).



# Suggestions for Improvement

*What can your Internet service do to raise your rating to a 10 out of 10?*

❑ Lower prices (31%), better reliability and value (16%) and faster speeds (12%) are the most popular suggestions for improvement.

Lower the prices	31%	Faster resolution of problems/ better technical support	5%
Nothing/ I’ m happy with my service	21%	Make service a one-stop shop (merge companies, provide bundles, etc.)	3%
Provide better service (more reliable connection, better value)	16%	Give me the speed I am paying for	2%
Faster internet speed	12%	More accuracy with billing	1%
Better customer service	8%	Misc.	2%

**Typical verbatim responses:**

*“Faster internet speed at a lower price.”*

*“I would like more consistent internet service that does not cut out or run slow. If I pay for a service and I expect it to be running well all the time.”*

*“I would like to see the internet run more smoothly. I find at times it does not work and it runs slowly. Sometimes you also have to reset the modem to get it working again.”*

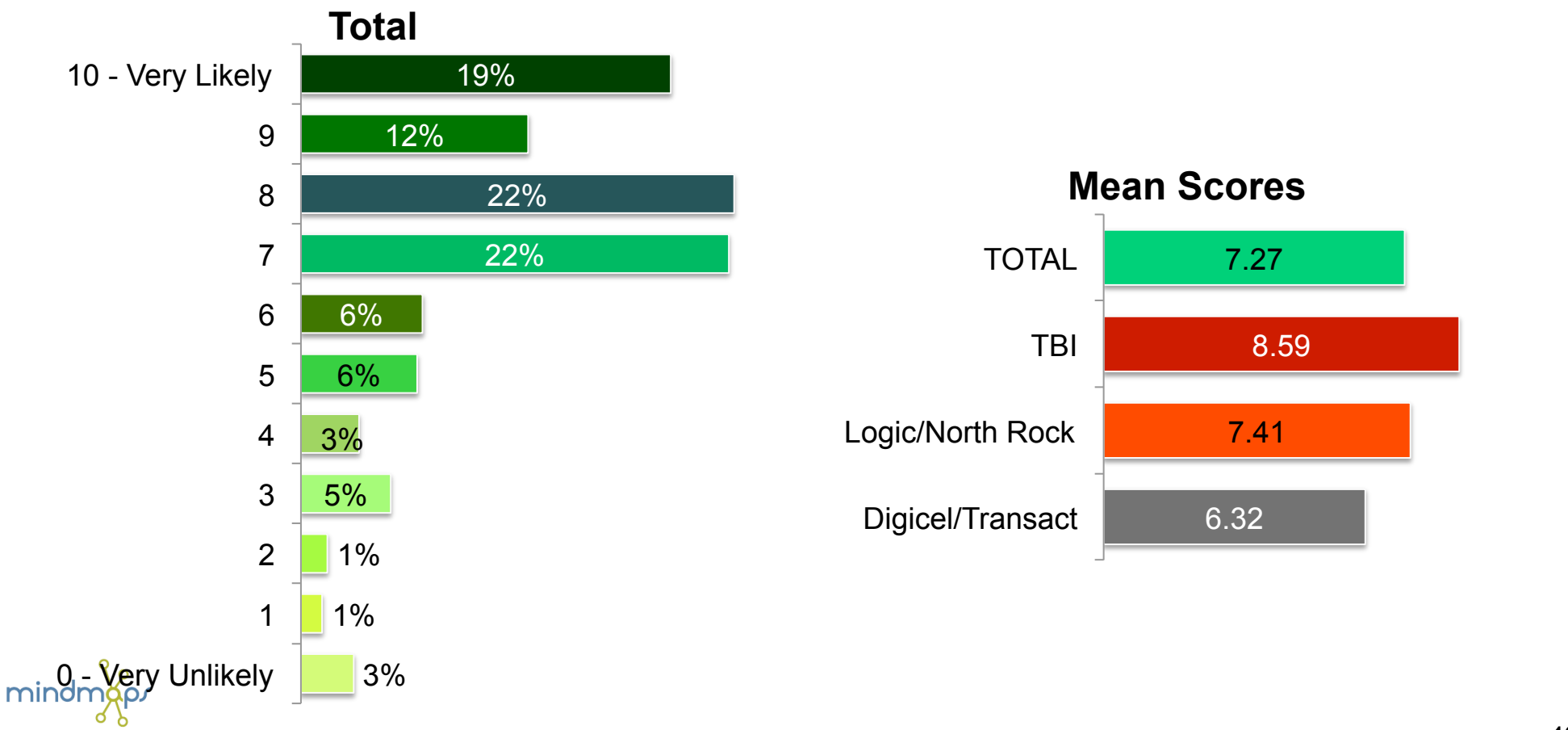
*“Improve the customer care by having staff that are trained properly and know their product so if customers have a problem or ask them questions, they are able to answer.”*

*“[Technical support] can respond faster to people’s questions. I find that they don’t call you back and then you have to follow up with them again. Be more responsive.”*

# Likelihood to Recommend Internet Service Provider

On a scale of 0 to 10, with 10 being Very Likely and 0 being Very Unlikely, how likely are you to recommend your Internet service provider to a friend or family member?

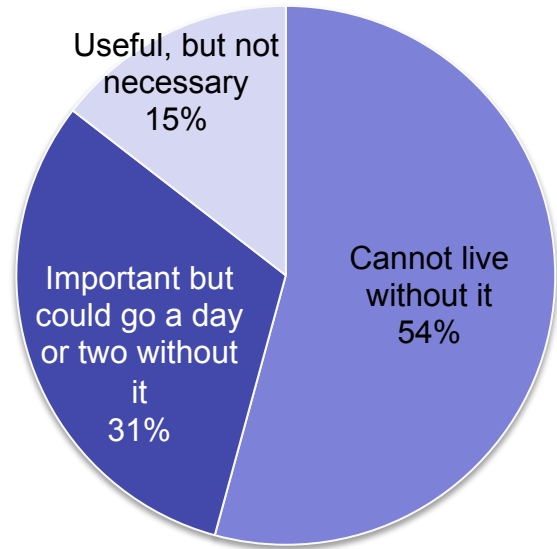
- ❑ Thirty-one percent of residents are likely to recommend their Internet Service Provider.
- ❑ TBI customers (Mean = 8.59) are more likely to recommend than Logic/North Rock customers (7.41) or Digicel/Transact customers (6.32).



# Importance of Internet in Daily Life

Which of the following best describes how important the Internet is in your personal or family life?

- ❑ Just over half of residents (54%) feel they cannot live without the Internet.
- ❑ Residents aged 35 to 44 (73%) and 45 to 54 years (79%) are more likely to feel they cannot live without the Internet.



	TOTAL	Male	Female	18-34	35-44	45-54	55-64	65+
Cannot live without it	54%	59%	50%	57%	73%	79%	43%	14%
Important but could go a day or two without it	31%	30%	32%	30%	22%	13%	48%	46%
Useful, but not necessary	14%	12%	17%	13%	5%	6%	8%	40%
Other*	-	-	1%	-	-	1%	-	-



*\*Other response: Necessary for family - particularly to facilitate Skype calls to children overseas.*

A vertical bar on the left side of the slide with a teal-to-green gradient.

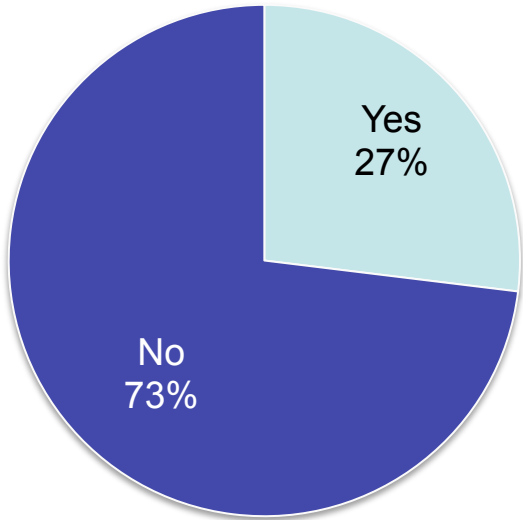
# **Regulatory Authority Perceptions**



# Awareness of Regulatory Authority

*Are you aware of the Regulatory Authority?*

- ❑ Just over one quarter of residents (27%) are aware of the Regulatory Authority.
- ❑ Male residents (34%) and those aged 55 to 64 years (41%) are more likely to be aware of the Regulatory Authority.



	TOTAL	Male	Female	18-34	35-44	45-54	55-64	65+
Yes	27%	34%	20%	15%	34%	33%	41%	24%
No	73%	67%	80%	85%	66%	67%	59%	76%

# Purpose of Regulatory Authority

*What do you think the purpose of the Regulatory Authority should be? (N=112; multiple responses accepted)*

❑ Residents feel the purpose of the Regulatory Authority should be to regulate and ensure the legality of telecom providers (29%) and protect consumers by ensuring the best services and rates (28%).

Regulating and ensuring legality of telecom providers	29%
Protecting customer by ensuring best service and rates	28%
Ensuring standardization and fairness of the market	12%
Protecting against monopolies	8%
Simplifying internet service (eg. allowing same email when changing, bundling services, merging providers, etc.)	6%
Bring new ideas and technologies to the island	4%
Ensuring quality customer service	3%
Resolving customer issues with telecom providers	3%
Ensuring proper function of operations	2%
Misc.	4%

## **Typical verbatim responses:**

*"To make sure that everyone is playing by the same rules."*

*"To review costs and ensure that customers are getting value and service. They also look at similar services in other countries and make rates comparable on products and services."*

*"To make sure the big companies (like Digicel) do not take over and put the Bermudian companies out of business."*

*"To ensure and regulate across the Internet providers, and to assure they give good service."*

## Thank You

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*Mindmaps would like to thank the  
Regulatory Authority for the  
opportunity to work on this very  
important research initiative*