Bermuda Broadband Market Study

Research Results

for:

January 2015

Survey Overview

Sample/Methodology

- Global Research utilised Computer Assisted Telephone Interviewing (CATI) to survey a representative sample of 403 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 late December 2014 to early January 2015 and lasted approximately 15 minutes.

Survey Overview

- Research Objectives:
  - Provide an annual 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
    - Attributes and important factors when selecting an Internet Service Provider
    - Satisfaction with Internet Service Providers and Likelihood to Recommend
    - Likelihood of switching Internet Service Providers
  - The results are compared to those collected in 2013.

Executive Summary

Executive Summary

Internet Penetration and Device Ownership

- ***Bermuda continues to enjoy high Internet penetration***
  - *Close to 9 in 10 residents (89% vs. 91% in 2013) had Internet service.*
  - *Almost one third (32%) without Internet service said they do not need it. A further 29% said it is "too expensive".*
  - *Fourteen percent without Internet service were likely to get it in the next 6 months.*
  - *Most residents have an Internet-ready device in their home with the most popular being a laptop (79%).*

Market Share

- ***Logic continued to be the ISP leader but saw a 10 point decline in market share***
  - *The majority of residents had CableVision (45% vs. 36% in 2013) or DSL (42% vs. 44% in 2013) Internet access.*
  - *Although remaining the market leader, Logic saw a 10 point decline in its market share (from 75% in 2013 to 65% in 2014).*
  - *As a new market entrant, CableVision acquired 12% of the ISP market.*

Executive Summary

Download Speeds

- ***Internet download speed is considered "slow" although most people have 8MB or less***
  - *Fifty-nine percent reported download speeds between 3MB and 8MB, compared to 69% in 2013, and 18% reported download speeds of 10MB or higher, compared to 16% in 2013.*
  - *Sixty-one percent were satisfied with their Internet speed, a 5 point decline from 2013.*
    - *The number one reason for dissatisfaction was perceiving speed as too slow (51%).*
  - *Twenty-three percent were likely to upgrade their speed in the next six months, an 8 point increase from the 2013 results.*

Executive Summary

Price

- ***Residents continue to be price sensitive. Cost is the number one issue for residents and they are willing to switch providers for a lower cost***
  - *Close to 7 in 10 residents (69% vs. 71% in 2013) believed that the cost of Internet access and service in Bermuda is expensive.*
  - *On average, residents reported spending $118 per month for internet service, $4 less than the average spend in 2013.*
  - *Sixty-two percent of residents would switch providers if the monthly cost of Internet service could decrease by 20%.*

Executive Summary

Information on Internet Service

- ***Information on Internet service is available and provides adequate information for residents to select a provider***
  - *The most popular methods of obtaining information regarding Internet service and pricing continue to be advertisements (53% vs. 57% in 2013), family or friends (44% vs. 46% in 2013), customer care (41% vs. 43% in 2013) and provider websites (41% vs. 39% in 2013).*
  - *Consistent with 2013, 62% (vs. 64% in 2013) said they believe that 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 said they would prefer having only one provider for both Internet access and service (85% vs. 83% in 2013).*
  - *The biggest issue with having two suppliers included diagnosing the route cause of the problem (36%) and having two bills/two contracts which likely gives rise to increased expenditure for Internet service (32%).*

Executive Summary

Importance Factors

- ***Reliability and quality of service were the top two factors when deciding on an Internet service provider***
  - *Consistent with 2013, Reliability (96% vs. 95% in 2013) and Quality of service (96% vs. 96% in 2013) were the two most important factors when deciding upon an Internet Service Provider.*
  - *Residents were most satisfied with their Internet Service Provider’s technical support (71%, 8 point decline from 2013) and quality of service (70%, 8 point decline from 2013).*

Importance of Internet in Daily Life

- ***Internet continues to play an important role in resident’s lives.***
  - *Over 8 in 10 (88% vs. 85% in 2013) deemed having Internet as important to their lives (i.e. either "cannot live without it" or "important but could go a day or two without it).*

Executive Summary

Satisfaction with Internet Service Provider

- ***Residents continue to be marginally satisfied with their Internet Service Provider***
  - *Average satisfaction with internet service providers was 7.49/10 (vs. 7.48 in 2013).*
  - *Introducing better rates or reducing the cost of service was the number one suggestion for improving satisfaction (47%).*

Likelihood to Switch Providers

- ***Increased competition continues to result in residents switching providers***
  - *Identical to 2013, 19% had switched Internet Service Providers in the past 2 years.*
  - *Seventy-seven percent (vs. 76% in 2013) said that it is not difficult to switch providers.*
  - *Having a contact/termination fees (50%) was the top reason given by residents who deemed switching to be difficult.*

Executive Summary

Likelihood to Recommend Internet Service Provider

- ***Residents are moderately willing to recommend their Internet Service Provider***
  - *Average score for likelihood of recommending providers declined by .23 points, from 7.27 to 7.04.*

Perceptions of Regulatory Authority

- ***Awareness of the Regulatory Authority is increasing***
  - *Awareness of Regulatory Authority increased by 16 points, from 27% in 2013 to 43% in 2014.*
  - *Residents believed that the purpose of the Regulatory Authority should be to ensure fair pricing and service (29%) and to regulate phone, internet and other modes of communication (28%).*

Detailed Findings

Internet Usage & Market Share

Device Ownership

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

- Close to 8 in 10 residents (79% vs. 82% in 2013) own at least one laptop computer.

- There was a 15 point increase in tablet ownership (53% vs. 68%) and a 7 point decline in desktop computer ownership (47% vs. 54%).

	2013	2014
Desktop Computer	54%	47%
Laptop Computer	82%	79%
Netbook Computer	7%	6%
Tablet (such as iPad or Kindle)	53%	68%

	2013	2014
Desktop Computer		
None	46%	53%
One	48%	40%
Two	5%	5%
Three or more	1%	2%
Netbook Computer		
None	93%	94%
One	7%	5%
Two	0%	1%
Three or more	0%	0%
Laptop Computer		
None	18%	21%
One	51%	52%
Two	15%	19%
Three or more	16%	8%
Tablet (such as iPad or Kindle)		
None	47%	32%
One	38%	37%
Two	15%	17%
Three or more	0%	14%

Internet Service in the Home

Do you currently have Internet service in your home?

- Close to 9 in 10 residents (89% vs. 91% in 2013) had Internet service.

	2013	2014	Male	Female	18-34	35-44	45-54	55-64	65+
Yes	91%	89%	85%	92%	83%	91%	90%	95%	74%
No	9%	11%	15%	8%	17%	9%	10%	5%	26%

No Internet Service in the Home/Likelihood to get Internet

Why do you not have Internet service in your home? (N = 41 responses)

- Almost one third (32%) without Internet service said they do not need it. A further 29% said it is "too expensive".

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?

- Fourteen percent without Internet service were likely to get it in the next 6 months.

	2014
Not required / not interested / too old	32%
Too expensive	29%
Use mobile data plans	14%
Use parents / neighbours / other nearby Wi-Fi	10%
Utilize free Wi-Fi hotspots	8%
Thinking about getting Internet	5%
No service (broken/ hurricane damage)	3%

	2013	2014
TOP 2	***12%***	***14%***
5 - Very Likely	2%	6%
4	10%	8%
3	17%	11%
2	2%	12%
1 - Very Unlikely	63%	53%
Don't Know	6%	10%

Knowledge of the term "Broadband"

Do you know what "Broadband" means?

- Just over 7 in 10 (71% vs. 72% in 2013) reported knowing what "Broadband" means.
- Adults aged 65 and over were less likely to know what broadband means.

	2013	2014	Male	Female	18-34	35-44	45-54	55-64	65+
Yes	72%	71%	78%	66%	73%	71%	74%	71%	63%
No	28%	29%	22%	34%	27%	29%	26%	29%	37%

Internet Access and Service Providers

Does your Internet access come through your…

- The majority of residents had CableVision (45% vs. 36% in 2013) or DSL (42% vs. 44% in 2013) Internet access.

	2013	2014
Telephone line - DSL (BTC – NOT dial up)	44%	42%
Cable line (CableVision)	36%	45%
Wireless – CellOne/EasyConnect	4%	3%
Wireless – North Rock	13%	9%
Don't Know	2%	1%

Who is your Internet Service Provider?

- Although remaining the market leader, Logic saw a 10 point decline in market share (from 75% in 2013 to 65% in 2014).
- As a new market entrant, CableVision acquired 12% of the ISP market.

	2013	2014
Logic	75%	65%
CableVision	0%	12%
Digicel	15%	9%
CellOne	0%	4%
TBI	7%	8%
LinkBermuda	0%	1%
Don't Know	3%	1%

Download Speeds

What download speed do you have?

- Fifty-nine percent reported download speeds between 3MB and 8MB, compared to 69% in 2013.
- Eighteen percent reported download speeds of 10MB or higher, compared to 16% in 2013.

	2013	2014
1 – 1.5MB or less	2%	2%
2 – 2.5MB	7%	10%
3MB – 4MB	24%	20%
6MB	21%	17%
8MB	25%	22%
10MB	11%	13%
15MB	2%	4%
25MB	3%	1%
Don't Know	6%	11%

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-one percent were satisfied with their Internet speed, a 5 point decline from 2013.

	2013	2014
TOP 2	***66%***	***61%***
5 - Very Satisfied	30%	33%
4	36%	28%
3	20%	22%
2	7%	9%
1 - Very Unsatisfied	5%	8%
98 - Volunteered: Don't Know	1%	0%

Satisfaction with Speed of Internet Service – Cont' d

Why do you say that you are unsatisfied with your Internet speed? (N = 139 responses)

- The number one reason for dissatisfaction was perceiving speed as too slow (51%).
- Twenty-nine percent were dissatisfied due to inconsistent service.

	2014
Speed is too slow	51%
Inconsistent service (doesn't always work, poor service, dropped service, etc..)	29%
Not receiving the service/ speed that I am paying for	9%
Too expensive	5%
Need to upgrade to a faster speed	4%
Service restoration is slow	3%

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?

- Twenty-three percent were likely to upgrade their speed in the next six months, an 8 point increase from the 2013 results.
- Residents who currently have 2 - 2.5MB were more likely to upgrade their speed.

	2013	2014	1 – 1.5MB or less	2 – 2.5MB	3MB – 4MB	6MB	8MB	10MB	15MB
TOP 2	***15%***	***23%***	***14%***	***33%***	***24%***	***21%***	***26%***	***18%***	***15%***
5 - Very Likely	7%	12%	14%	15%	15%	10%	9%	8%	15%
4	8%	11%	0%	18%	8%	11%	17%	10%	0%
3	15%	15%	29%	21%	18%	21%	9%	14%	23%
2	15%	7%	0%	3%	11%	5%	4%	12%	0%
1 - Very Unlikely	49%	51%	57%	42%	46%	51%	56%	53%	62%
Don't Know	5%	3%	0%	0%	1%	2%	5%	2%	0%

Likelihood to Upgrade Speed (Continued)

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

- Residents likely to upgrade their speed, said they will do so for a faster connection, and faster downloading (63%). (N = 73 responses)
- Residents not likely to upgrade their speed were happy with their current service/speed (53%). (N = 174 responses)

LIKELY to upgrade speed	2014
For a faster speed/faster downloading/faster connection	63%
Want faster internet service	14%
Not happy with my current service/cost	10%
Depends on the cost	7%
Depends on the information that comes out/on the offer	4%
In the process of upgrading internet speed	3%

NOT LIKELY to upgrade speed	2014
Happy with my current service/speed	53%
There is no need to upgrade right now	23%
Too costly	17%
Just got service/just upgraded	6%
No time to upgrade	1%

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.

- On average, residents reported spending $118 per month for internet service, $4 less than the average spend in 2013.

	2013	**2014**
$0 - $49	6%	5%
$50 - $99	33%	27%
$100 - $149	24%	42%
$150 - $199	24%	19%
$200 - $249	9%	5%
$250 - $299	2%	2%
$300 or more	2%	0%
AVERAGE	***$121.93***	***$117.62***

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]?

- Close to 7 in 10 residents (69% vs. 71% in 2013) believed that the cost of Internet access and service in Bermuda is expensive.

	2013	2014
Expensive	71%	69%
Reasonable	24%	24%
Cheap	3%	1%
Don't Know	2%	6%

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]

- The most popular methods of obtaining information regarding Internet service and pricing continues to be advertisements (53% vs. 57% in 2013), family or friends (44% vs. 46% in 2013), customer care (41% vs. 43% in 2013) and providers' websites (41% vs. 39% in 2013).

	2013	2014	Male	Female	18-34	35-44	44-54	55-64	65+
Provider's website	39%	41%	42%	40%	34%	36%	43%	57%	37%
Advertisements	57%	53%	57%	50%	65%	50%	49%	50%	47%
Customer care (in store/phone)	43%	41%	45%	39%	57%	39%	31%	46%	27%
Family or friends	46%	44%	45%	43%	45%	42%	43%	46%	47%
Do not search for this information	11%	14%	13%	14%	12%	14%	18%	7%	20%
Don't Know	4%	2%	1%	2%	0%	3%	1%	0%	5%

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-two percent (vs. 64% in 2013) said they believe that it is easy to select an Internet service based on the information available.

	2013	2014	Male	Female	18-34	35-44	45-54	55-64	65+
TOP 2	***64%***	***62%***	***69%***	***57%***	***62%***	***76%***	***73%***	***68%***	***46%***
5 - Very Easy	40%	39%	46%	33%	41%	41%	51%	38%	24%
4	24%	24%	23%	24%	21%	34%	22%	30%	22%
3	20%	19%	16%	22%	21%	20%	18%	17%	22%
2	9%	5%	2%	7%	13%	2%	5%	5%	14%
1 - Not Very Easy	3%	4%	4%	4%	0%	0%	3%	5%	10%
Don't Know	4%	10%	9%	10%	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, 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 said they would prefer having only one provider for both Internet access and service (85% vs. 83% in 2013).

	2013	2014
I would prefer to have one provider for Internet access and service	83%	85%
Two providers makes having Internet more expensive	85%	80%
I do not like having to pay two separate bills for Internet access and service	81%	78%
Two providers makes having Internet more complicated	84%	77%
Internet access and service providers “point fingers” and blame each other for service issues	78%	77%

Other Issues With an Internet Access & Service Provider

Are there any other issues you see with having both an Internet Access and Internet Service Provider? (N = 100 responses)

- Other issues recalled by residents included diagnosing the route cause of the problem (36%) and having two bills/two contracts which likely gives rise to increased expenditure for Internet service (32%).

	2014
Figuring out where the problem lies (dealing with more than one company)	36%
Having two bills/added expense/having two contracts	32%
Inconvenient/ too much hassle	9%
Complicated equipment/upgrading both	5%
Unreliable service/not getting what I am paying for	5%
When phone line is down unable to access the Internet	5%
Makes no sense to have two/would prefer a bundle package from one company	4%
Poor customer service	3%

Importance Factors When Deciding On An Internet Service Provider

Important Factors when Deciding on an ISP

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 (ISP)?

- Consistent with 2013, Reliability (96% vs. 95% in 2013) and Quality of service (96% vs. 96% in 2013) were the two most important factors when deciding upon an Internet Service Provider.

	2013	2014
Reliability of Internet service	95%	96%
Quality of Internet service	96%	96%
Good customer service	96%	94%
Offers value for money	93%	94%
Fast download speeds	85%	94%
Good technical support	92%	93%
Reputation of the company	68%	81%
Offers bundled packages	73%	75%
Has innovative products and services	80%	72%
Is a Bermudian company	61%	59%
Is community oriented	57%	56%

Satisfaction & Likelihood of Switching

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 . . .

- Compared to 2013, overall average satisfaction with Internet provider attributes declined by 8 points, from 72% in 2013 to 64% in 2014.
- Residents were most satisfied with their Internet Service Provider's technical support (71%, 8 point decline) and quality of service (70%, 8 point decline)

	2013	2014
Technical support	79%	71%
Quality of Internet service	78%	70%
Customer service	82%	69%
Reliability of Internet service	77%	67%
Download speed	66%	58%
Value for money	51%	49%
Overall Average	72%	64%

Number One Issue with Internet Service

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

- Cost (36% vs. 43% in 2013) and reliability (13% vs. 11% in 2013) continue to be top issues with Internet service.

	2013	2014
Cost (too expensive)	43%	36%
Not reliable (inconsistent service)	11%	13%
Slow speed	10%	11%
Not getting the speed I pay for	7%	10%
Poor customer service	4%	3%
Poor quality	4%	3%
Poor technical support	4%	1%
*Other	8%	15%
Don't Know	9%	9%

***Other responses:** No issues/satisfied with company (13%), too much down time (1%), having to rely on two providers (.65%), not receiving a credit when service is down (.35%).

Likelihood to Switch with 20% Decrease in Cost

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

- Identical to 2013, 62% would switch providers if the monthly cost of Internet service could decrease by 20%.

	2013	2014	Male	Female	18-34	35-44	45-54	55-64	65+
TOP 2	***62%***	***62%***	***62%***	***62%***	***63%***	***70%***	***61%***	***63%***	***49%***
Definitely will switch	47%	36%	39%	34%	47%	33%	30%	37%	27%
Probably will switch	15%	26%	23%	28%	16%	37%	30%	27%	22%
Might or might not switch	16%	16%	16%	16%	16%	14%	10%	17%	27%
Probably will not switch	5%	11%	10%	13%	12%	6%	15%	8%	14%
Definitely will not switch	6%	8%	7%	9%	3%	9%	11%	10%	10%
Volunteered: Don't Know	10%	3%	5%	2%	6%	1%	3%	2%	0%

Likelihood to Switch with 20% Decrease in Cost

Why would you not switch Internet service providers? (N = 42 responses)

- Forty-five percent of residents who would not switch providers for a 20% discount, said they would not do so because they were happy with their current provider.
- A further 28% said that the provider would have to offer a much better cost, service, or bundled package.

	2014
Happy with current Internet service provider	45%
They would have to be a much better cost, service or bundled package offer	28%
Too much hassle to switch providers	8%
I have recently switched providers	4%
Fear of the unknown	4%
My email address keeps me with my provider	4%
Do not think the service would be better	3%
My company or family member is the decision maker	2%
All providers are the same so there is no point in switch	2%

Contract with Internet Service Provider

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

- Twenty-four percent (vs. 25% in 2013) reported having a contract with their ISP, compared to 28% in 2013.

	2013	2014
Yes – contract term 1 year or less	8%	10%
Yes – contract term more than 1 year up to 2 years	12%	12%
Yes – contract term more than 2 years	5%	2%
No	68%	70%
Volunteered: Don't Know	6%	6%

Switched in the Last 2 Years

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

- Identical to 2013, 19% had switched Internet Service Providers in the past 2 years.

	2013	2014
Yes	19%	19%
No	80%	79%
Don’t Know	0%	2%

Difficulty in Switching Internet Service

Do you think it is difficult to switch Internet service?

- Seventy-seven percent (vs. 76% in 2013) said that it is not difficult to switch providers.

	2013	2014
Yes	17%	9%
No	76%	77%
Don't Know	6%	13%

Why do you think it is difficult to switch Internet service?

- Having a contact/termination fees (50%) was the top reason given by residents who deemed switching to be difficult.

	2014
Have a contract / termination fees	50%
Cannot change my email address	30%
Current provider would make it difficult to switch	17%
Customer service staff not helpful	12%
Cannot get DSL/Cable/Wireless at my home	3%
My employer/landlord/someone else pays for my Internet	2%

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?

- Identical to 2013, 11% said that they are likely to switch providers in the next 6 months.

	2013	2014
TOP 2	***11%***	***11%***
5 - Very Likely	7%	7%
4	4%	4%
3	21%	12%
2	11%	10%
1 - Very Unlikely	46%	60%
98 - Volunteered: Don't Know	10%	6%

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?

- Residents said they were likely to switch Internet service providers due to service issues with their current provider (33%), or for a better price, service or offer (25%). (N = 42 responses)
- Residents were not likely to switch providers due to being happy with their current service provider (51%). (N = 212 responses)

LIKELY to switch	2014
Because of service issues with my current provider	33%
For a better price, service, and offer	25%
I plan to switch	17%
For a faster speed/better network	17%
For a bundle offer	8%

NOT LIKELY to switch	2014
Happy with my current service provider	51%
I have no reason to switch	15%
Too much hassle involved in switching	13%
It would have to be a very significant price or offer for me to consider it	10%
I have already switched	5%
They are all the same so there is no point.	3%
My company / another family member is responsible for managing the account	3%

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?

- Consistent with 2013, average satisfaction with internet service providers was 7.49/10 (vs. 7.48 in 2013).

	2013	2014
10 - Very Satisfied	15%	23%
9	14%	10%
8	29%	22%
7	19%	20%
6	6%	8%
5	8%	10%
4	2%	5%
3	3%	3%
2	2%	%
1	1%	1%
PROMOTERS	**29%**	**32%**
DETRACTORS	**22%**	**26%**
NPS	**7%**	**6%**
MEAN	**7.48**	**7.49**

Suggestions for Improvement

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

- Introducing better rates or reducing the cost of service was the number one suggestion for improving satisfaction (47%).

	2014
Introduce better rates/reduce the cost of service	47%
Offer faster internet speeds	16%
Improve coverage, less downtime, drop-outs	12%
Improve technical support	8%
Introduce better packages and bundles	7%
Ensure customer receives the speed they are paying for	6%
Improve service	5%

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?

- Average score for likelihood of recommending providers declined by .23 points, from 7.27 to 7.04.

	2013	2014
10 - Very likely	19%	23%
9	12%	10%
8	22%	15%
7	22%	15%
6	6%	11%
5	6%	11%
4	3%	4%
3	5%	3%
2	1%	1%
1	1%	2%
0 – Very Unlikely	3%	4%
PROMOTERS	**31%**	**34%**
DETRACTORS	**25%**	**36%**
NPS	**6%**	**-3%**
MEAN	**7.27**	**7.04**

Importance of Internet in Daily Life

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

- Consistent with 2013, over 8 in 10 (88% vs. 85% in 2013) deemed having Internet as important to their lives (i.e. either "cannot live without it" or "important but could go a day or two without it).

	2013	2014	Male	Female	18-34	35-44	45-54	55-64	65+
Cannot live without it	54%	35%	41%	30%	44%	40%	36%	27%	16%
Important but could go a day or two without it	31%	53%	50%	56%	48%	49%	51%	65%	61%
Useful, but not necessary	14%	10%	7%	13%	7%	11%	6%	8%	20%
Not Required	0%	1%	1%	2%	1%	0%	3%	0%	2%
Don't Know	0%	1%	1%	1%	0%	0%	4%	0%	0%

Regulatory Authority Perceptions

Awareness of Regulatory Authority

Are you aware of the Regulatory Authority?

- Awareness of Regulatory authority increased by 16 points, from 27% in 2013 to 43% in 2014.

	2013	2014	Male	Female	18-34	35-44	45-54	55-64	65+
Yes	27%	43%	49%	37%	29%	47%	40%	58%	47%
No	73%	57%	51%	63%	71%	53%	60%	42%	53%

Purpose of Regulatory Authority

What do you think the purpose of the Regulatory Authority should be? (N = 136 responses)

- Residents believed that the purpose of the Regulatory Authority should be to ensure fair pricing and service (29%) and to regulate phone, internet and other modes of communication (28%).

	2014
Ensure fair pricing and service	29%
Regulate phone, internet and other modes of communication	28%
Ensuring providers follow the rules and regulations	19%
Protect the consumer	12%
Ensure competitive market place	9%
Assist in telecommunications sector	1%
Enhance Bermuda's telecom industry	1%
Provide technical assistance to consumers	1%
Collecting money from the service provider	1%

Thank You

Global Research would like to thank the Regulatory Authority for the opportunity to work on this very important research initiative.

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