



Oaseirys Çhellinsh
Communications Commission

Isle of Man Communications Commission

2017/18 Consumer Broadband Habits Survey Results Report

Publication Date: 19 March 2018

Introduction

The Isle of Man Communications Commission launched its first Consumer Broadband Habits Survey (hereafter referred to as "the survey") on 18th December 2017 and it ran until 15th January 2018.

We received a total of 516 responses to the survey and would like to thank each person that took the time to complete the survey.

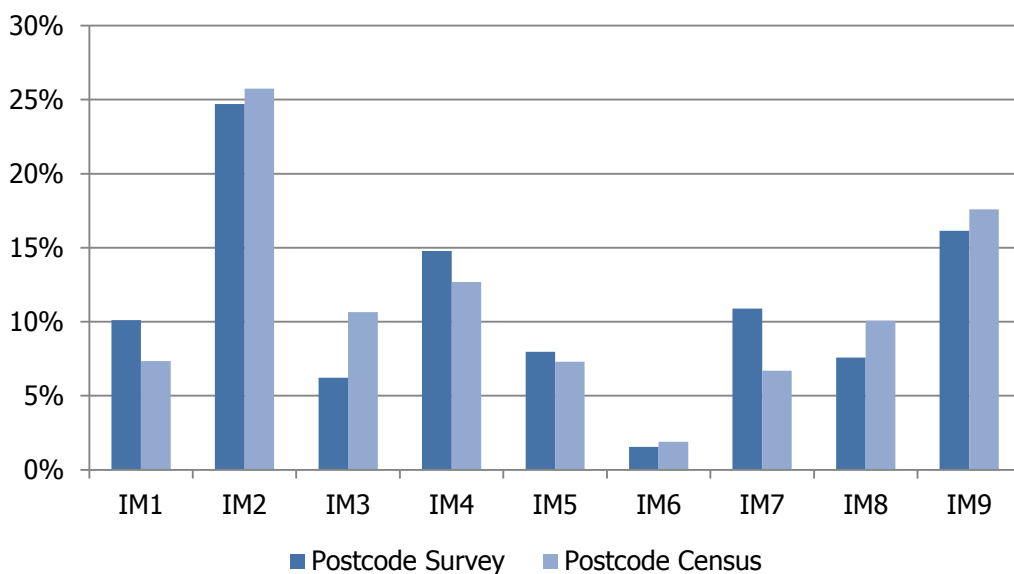
Who Responded to the Survey?

We asked questions about the age of the respondent and their postcode. This allowed us to know the demographics of those responding.

What are the first four digits of your post code?

We received the most responses from individuals living in the post code area IM2 (Douglas), followed by IM9 (Castletown, Ballasalla, Malew, Arbory, Port St Mary, Port Erin) and IM4 (Port Soderick, Santon, Greeba, Braddan, St John's, Foxdale, Onchan, Baldrine, Laxey, Lonan).

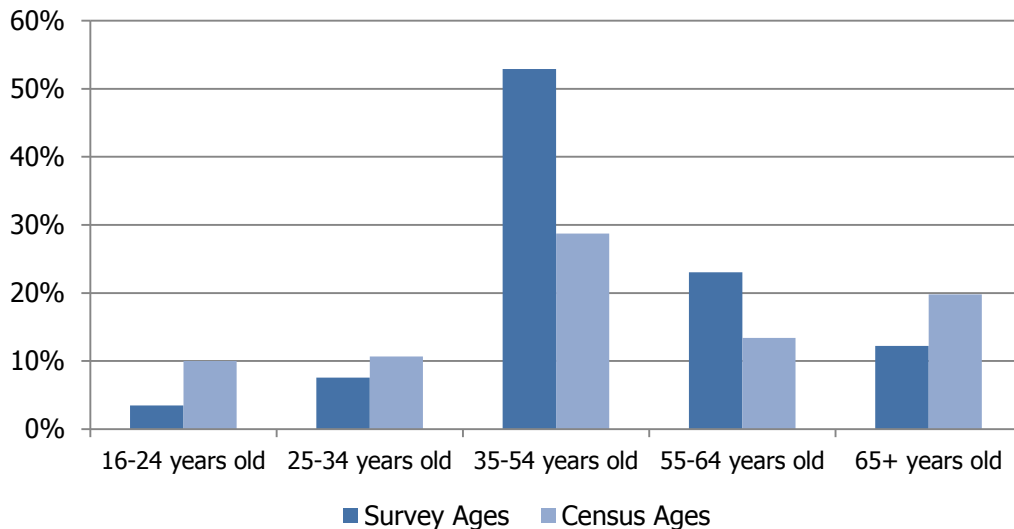
Comparing the distribution of respondent's household by census distribution shows that we received a good spread of responses across the Island.



What age are you?

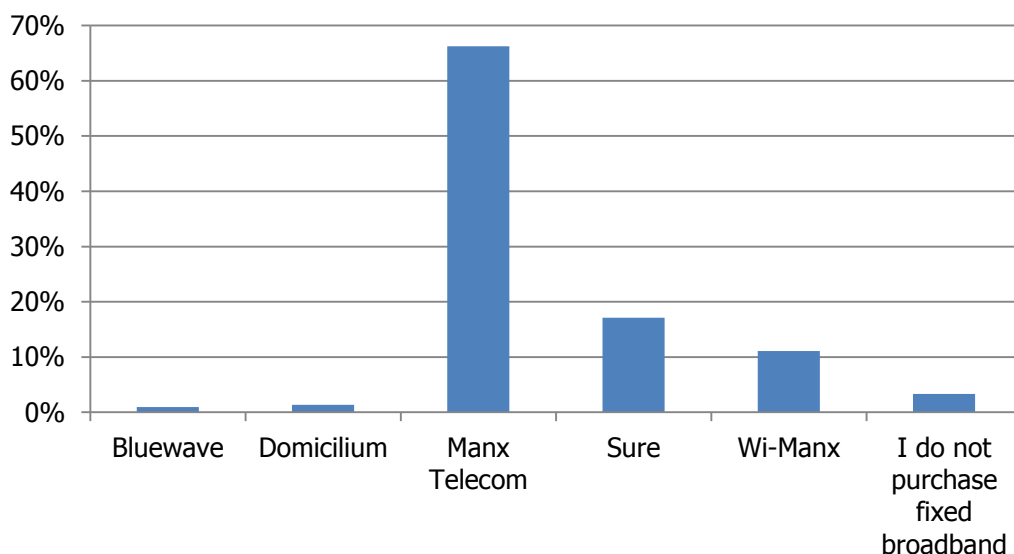
Over half of the respondents answering the survey stated that they were aged between 35 and 54 years old. The category with the lowest response rate was the 16-24 year old age group.

We compared the proportion of responses from individuals according to which age bracket they are within, with the latest census data. It shows that the proportion of responses from the 25-34 year bracket is about right. Responses from 16-24 year olds and 65+ are underrepresented and responses from 35-54 year olds and 55-64 year olds are over represented. We have not carried out any adjustments or weightings to account for this as we felt each response to this survey should bear an equal weighting.



What provider are you currently purchasing fixed broadband from?

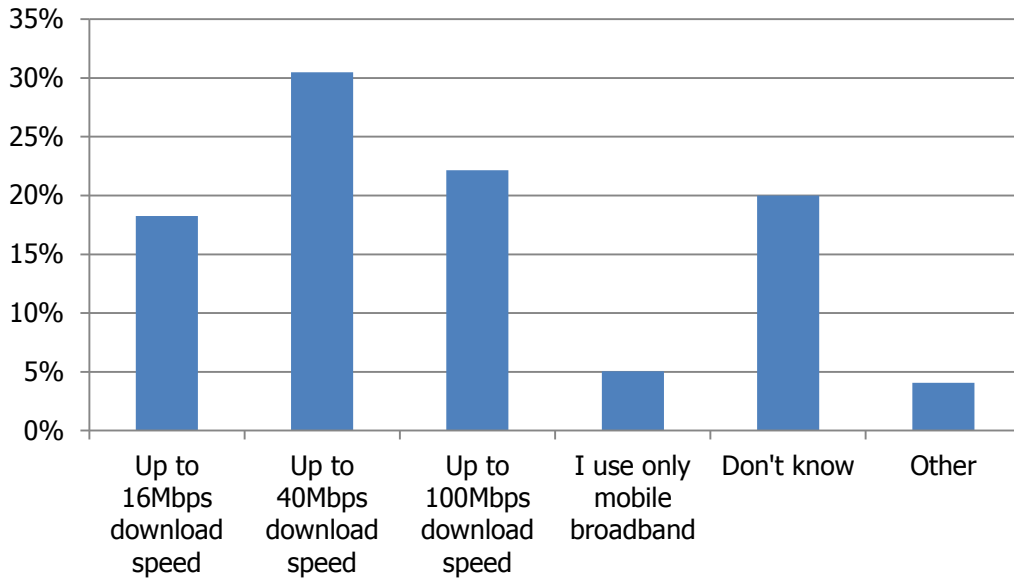
66% of respondents stated that they purchase their fixed broadband from Manx Telecom. This result is consistent with market data collected by the Commission which shows Manx Telecom has the highest market share as the incumbent operator. 17% of individuals purchased fixed broadband from Sure and 11% from Wi-Manx. 3% noted that they did not purchase fixed broadband.



Broadband Packages

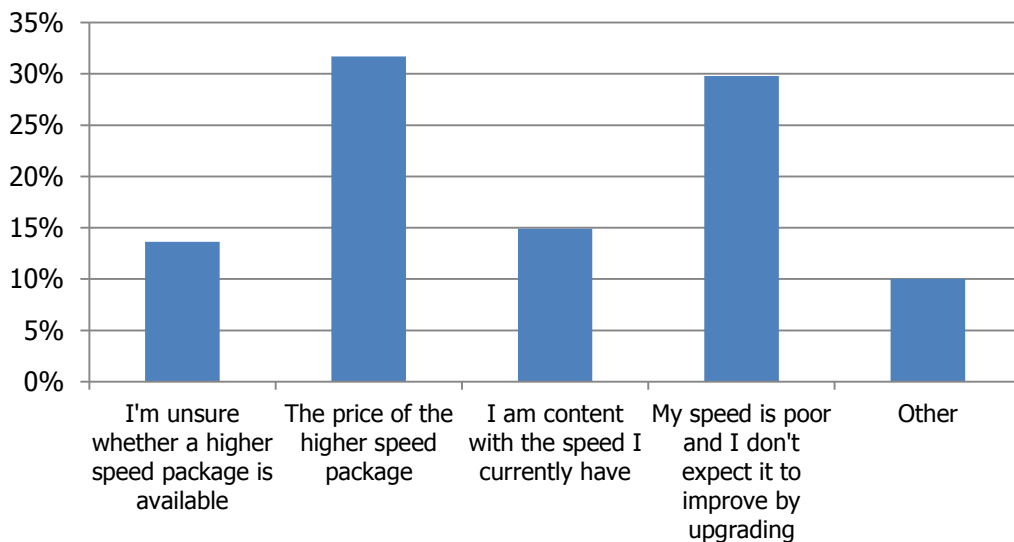
What fixed broadband package are you currently signed up to?

The results showed that over 50% of people responding to our survey were using a high speed broadband service (up to 40Mbps and up to 100Mbps). However, it also identified that 20% of individuals are unsure which package they are signed up to.



If there is a higher speed package available from the broadband provider that you are currently with, what is your reason for not upgrading?

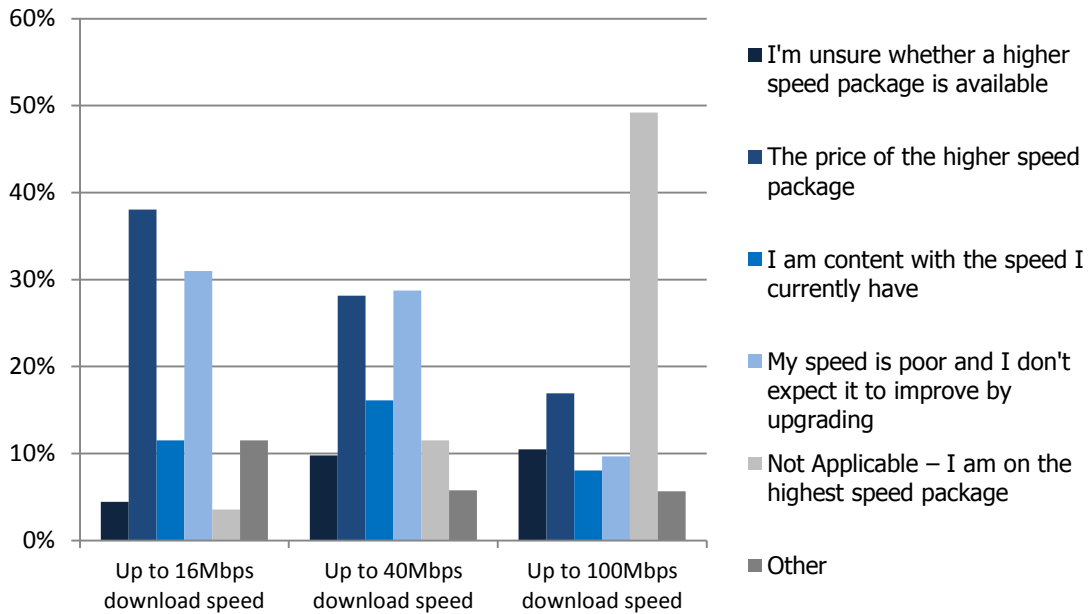
The most common reason for not upgrading is the price of upgrading to a higher speed broadband, followed by feeling that the speed is poor and won't improve by upgrading.



If there is a higher speed package available from the broadband provider that you are currently with, what is your reason for not upgrading, and broadband subscription

By breaking down the results according to which broadband subscription the consumer is signed up to, we can see that those on up to 16Mbps broadband packages (such as ADSL) appear to be more price sensitive, with 38% not upgrading due to the price. 28% of those on up to 40Mbps and 17% of those on up to 100Mbps noted price as a reason for not upgrading.

31% of those on up to 16Mbps and 29% of those on up to 40Mbps believe their speed is currently poor and that it will not improve by upgrading.



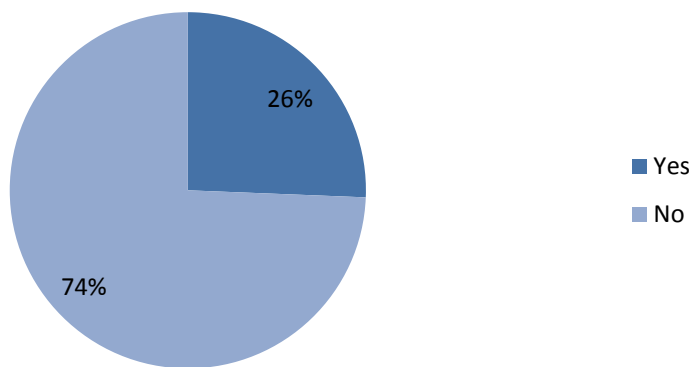
Consumer Switching

We asked a series of questions around whether the respondent had ever purchased fixed broadband from another provider, whether they would consider switching and what would encourage them to switch.

We wanted to find out the answers to these questions as this helps us to measure consumer engagement with the market. If consumers are engaged in the market, they will actively look for the best deals and switch provider according to which is providing the best value for money or product that suits their needs.

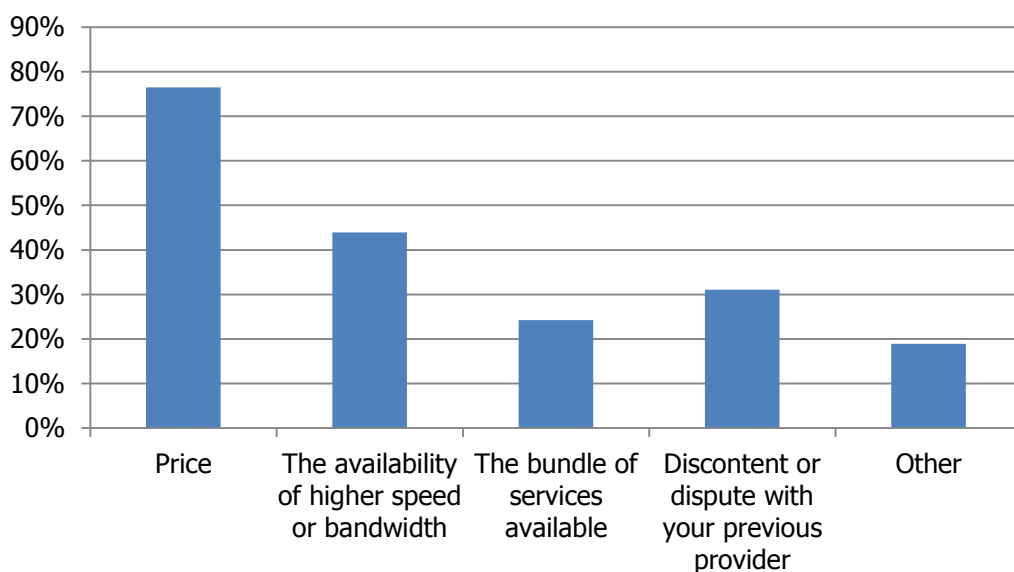
Have you ever purchased fixed broadband services from another provider at this same address?

We found that just over a quarter of individuals had switched providers at the address they currently live in.



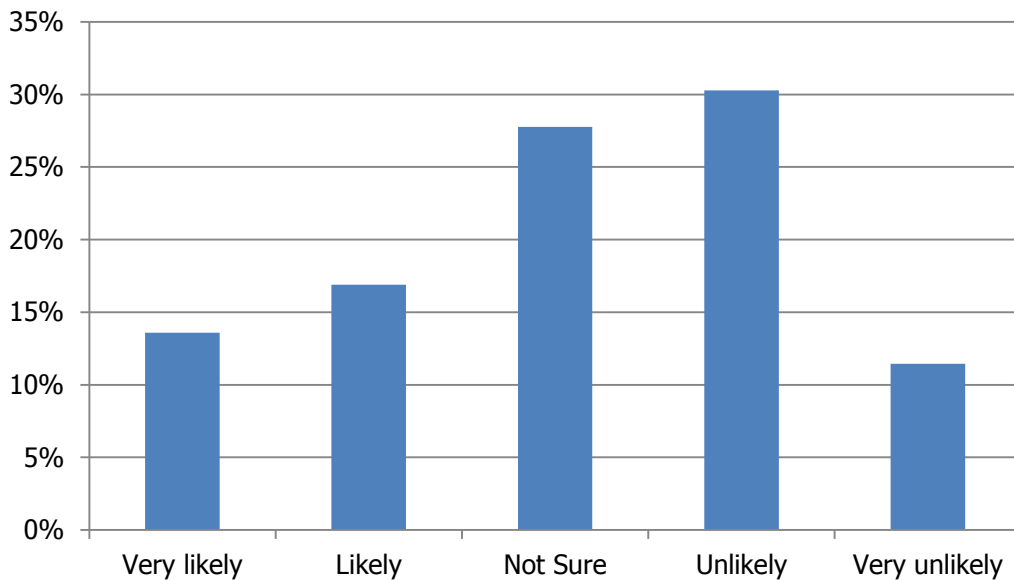
If you have switched broadband provider before, what were your main reasons for doing so?

This question allowed for multiple responses. Of the 132 individuals that had switched broadband provider, the majority (77%) noted that price was the reason why.



How likely are you to change your broadband provider in the future?

31% of respondents told us that they were very likely or likely to switch provider in the future. 28% were unsure and 41% were unlikely or very unlikely to switch.

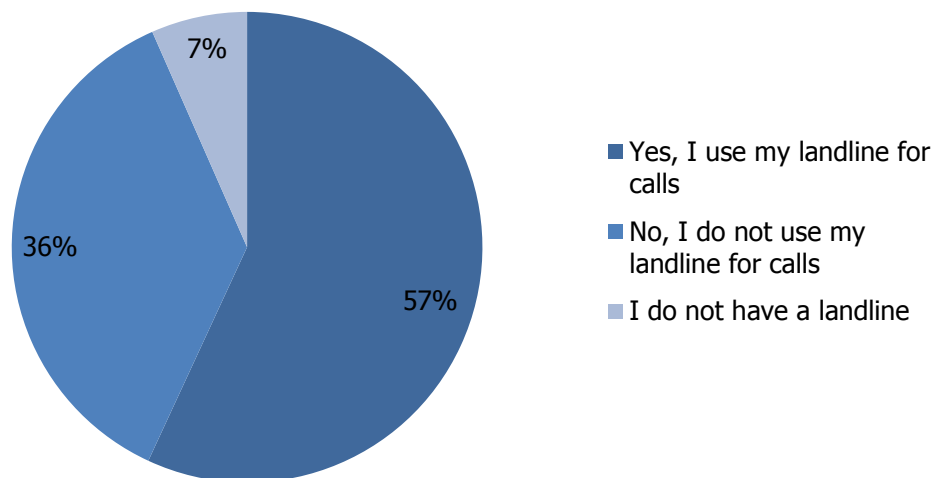


Consumer Habits

Do you use your landline to make and receive calls?

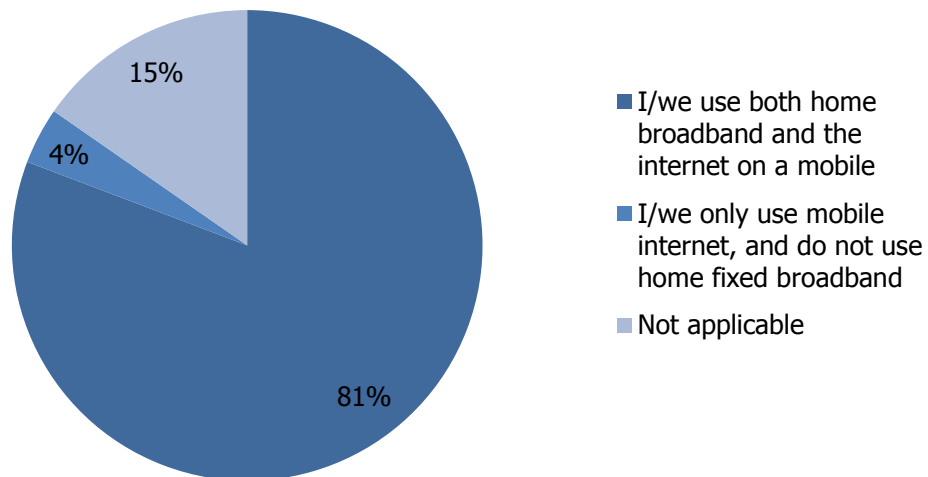
In the Isle of Man, if you wish to purchase a fixed broadband subscription, you need to have a landline for the physical connection to the property.

The results show that 36% of those who have a landline do not use it to make and receive calls, but instead use it solely for broadband access. Such customers are likely to use mobile and/or 'over the top' services (e.g. Skype) for making and receiving calls.



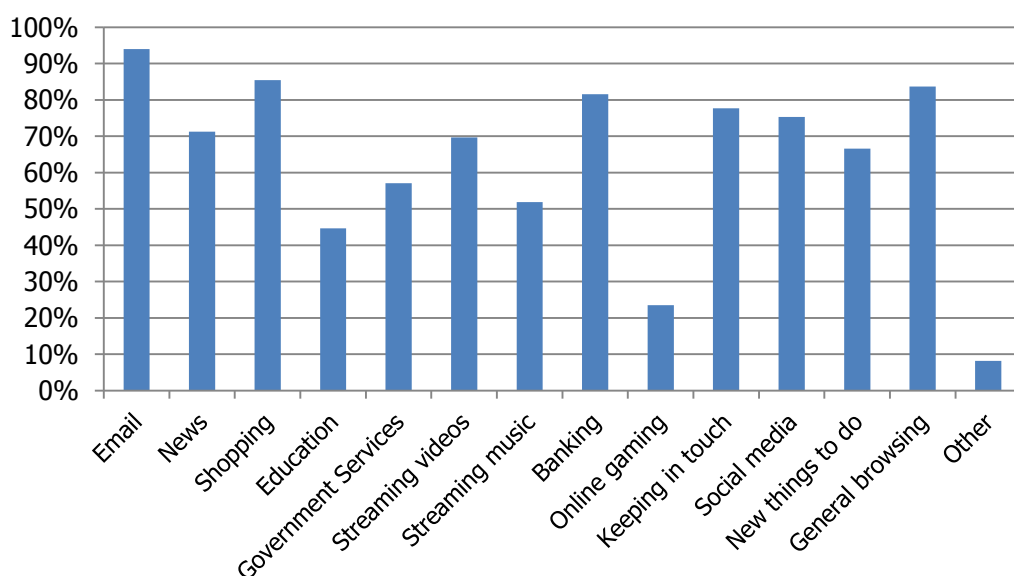
If you or others in your home use the internet on a mobile device, is this in addition to a home broadband service?

The responses indicated that 81% of respondents use the internet through both a mobile device and a home broadband service. 15% stated that this question was not applicable, as they did not use mobile devices to access the internet. 4% responded that they only use mobile internet. This suggests that mobile internet solutions are not perceived as a direct replacement for home broadband at this time, but that the majority of individuals view it as a complement to home broadband.



What are the most important reasons for having the internet in your home or on your mobile?

This was a multiple response question. The large majority of individuals told us that email, online shopping, internet banking and general internet browsing were important reasons for them having internet access. Other popular reasons included catching up on the latest news, streaming of videos or films, social media and keeping in touch with friends and relatives.



We allowed respondents to include additional comments in a free text box and we received several responses stating that the internet is required to allow working from home. A selection of comments not related to home working are provided below:

"Everything requires the internet these days. We need it for absolutely everything so I'm not sure how to answer this. It is basically essential nowadays."

"Heating System (Nest)"

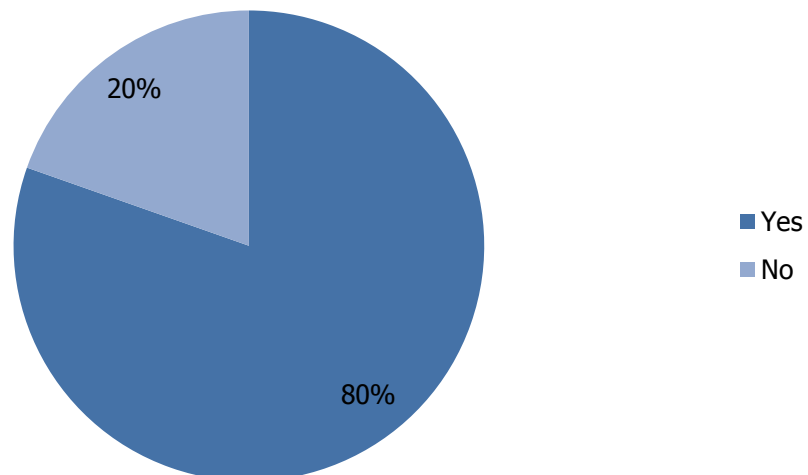
"Connected internet of things home devices"

"Software updates / installations"

Consumer Satisfaction

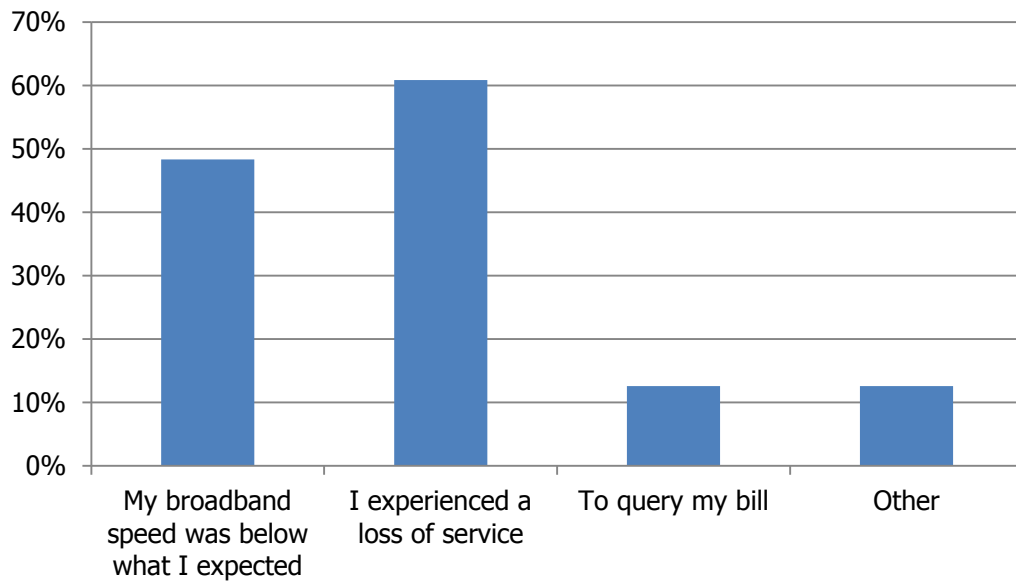
Have you ever had to contact your broadband provider's customer services?

80% of respondents to our survey told us that they have had reason to contact their broadband provider's customer service team at some point.



Why did you need to contact them?

Of those who indicated that they had contacted their broadband provider, 61% said it was because they experienced a loss of service, 48% because they were experiencing slow broadband and 13% to query a bill.



Of those that contacted them for another reason, a sample of the comments provided were:

“Technical support”

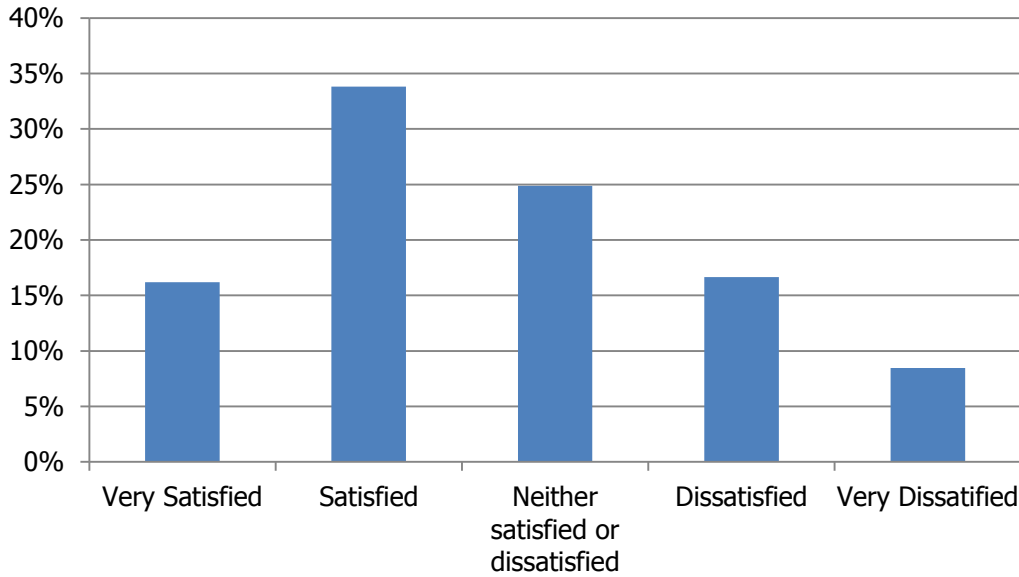
“Installing high speed broadband”

“Moving house”

“Upgrading routers”

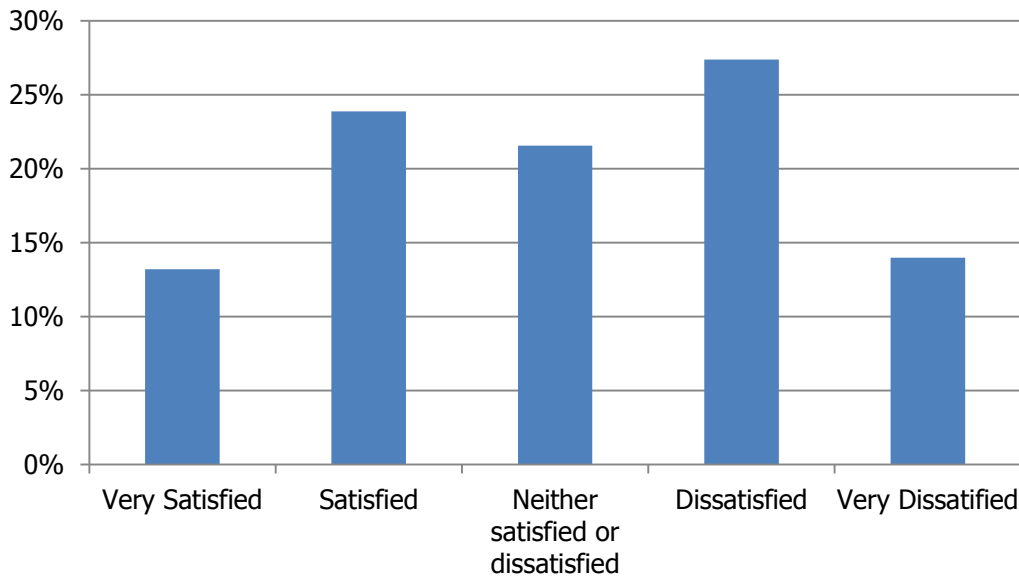
Overall, how would you describe your experience when dealing with your provider's customer services?

50% of respondents were satisfied or very satisfied with the customer service received from their broadband provider. 25% did not have a view either way and 25% were dissatisfied or very dissatisfied.



How satisfied are you with the overall quality of the broadband you receive from your provider? This includes speed and reliability for example.

Overall, 37% of respondents noted that they were very satisfied or satisfied with their broadband quality and 41% were dissatisfied or very dissatisfied. 22% did not have a view either way.



We then gave the respondents a chance to provide comments on why they gave the response that they did. Provided below are just a sample of comments received. A common theme was that consumers felt that they were not receiving the speeds that are advertised for their broadband product. This is a situation which is also apparent in the UK and something which we will be looking at this year.

Satisfied or very satisfied consumer comments:

- "Consistent service, very few line drops"
- "Can't beat it - friends on other providers always seem to have problem I never do or if do quickly sorted & information is always available about network status"
- "Not had any problems with my provider."
- "Stable connection with predictable speed. Very satisfied with the service."
- "Seems adequate for our needs"

Dissatisfied or very dissatisfied consumer comments:

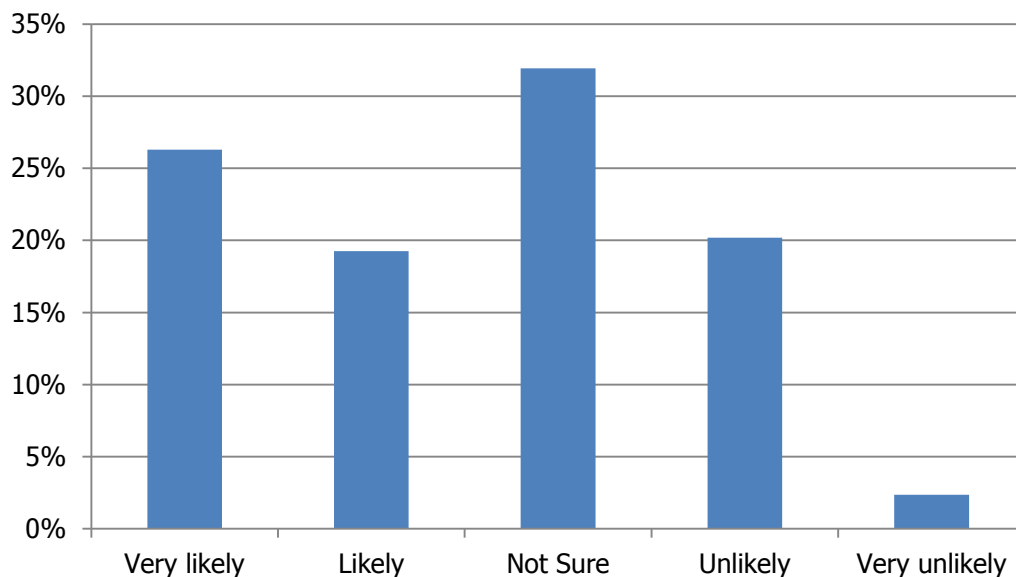
- "Very slow and stops working when you're halfway through either watching or doing something."
- "Quality is poor. With internet dropping out once or twice a day"
- "I would like to be able to stream 4K content but it isn't fast enough to do that."
- "Have new broadband installed and we're told the speed it should be but it's not."
- "We are quite rural and a long way from the exchange. Landline is crackly, broadband is often slow, mobile signal is also very poor."

Neither satisfied or dissatisfied comments:

- "Intermittent works some times and really good slow other time"
- "Occasional dropouts. Support line doesn't answer promptly."
- "Mostly it is fine however it does have a habit of dropping out of service sometimes."
- "Expensive"
- "Connection is reliable but speed varies considerably at peak times."

How satisfied are you with the overall quality of the broadband you receive from your provider, and likelihood of switching

We looked at those who told us they were dissatisfied or very dissatisfied with their broadband quality and compared this with how likely it is that they will switch provider. 22% are unlikely or very unlikely to switch, even though they are not satisfied. 32% are unsure and 46% are likely or very likely.



Running a Business

Do you use your home broadband to run a business?

10% of individuals responding to the survey told us that they use their home broadband service to run a business.

Over half of these individuals say they chose to run their business over home broadband as it was sufficient in terms of reliability, speed and bandwidth. 28% said it was cost effective. Of those that responded that it was for another reason, comments provided include:

“Many of my clients are abroad and in different time zones, a phone would not be an effective way of communication.”

“There is no viable alternative”

