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Turks and Caicos Islands Telecommunications Commission

Number Portability Marketing Research

Prepared by:
Outside the Box Advertising
outsidetheboxtci@gmail.com

Prepared for:
Kenva Williams
kenvawilliams@tcitelecommission.tc

Contents

Introduction

Conducting market research enables a company to make informed vital decisions affecting their customer base; or in this case, the population of the Turks and Caicos. Outside the Box Advertising was hired by the Turks and Caicos Telecommunication Commission to conduct market research on the sentiments of number portability within the country. The questions to be answered was how important are personal phone numbers to the mobile customer base and do they see the need for number portability between networks. A national survey collected data from all major islands within the Turks and Caicos, and various social groups. This document contains a descriptive analysis and statistics of the data collected along with recommendations for the future.

During the survey process several data collection methods were selected to minimize the margin of error and ensure the validity of the responses. Using the survey sampling equation, the goal was to receive a range of 300-600 collected responses. In total 630 responses were collected using a mixed method of online and in person interviews. Of the total collected responses 550 were completed giving a high completion rate of 87% for the survey. Therefore, the amount of responses received is a valid representation of the sentiments of the populace who actively use mobile services in the Turks and Caicos.

Background

The consultation process for number portability begin in 2016 with indepth discussions and planning between the Commission and mobile carriers in the Turks and Caicos. The undertaking of number portability is equally delicate and costly to all parties involved. However, the appropriateness of the facilitation of number portability is becoming a bigger question as more countries within the Caribbean, elect to deploy the service within their home countries. Therefore, the next step in the Commission's consultation process was to seek guidance from the population at large. A market research study was enacted with the following objectives.

Objectives

- Design a market research questionnaire and devise a strategic quantitative study using best practices in the field.
- Collect data relating to the population demographics, mobile usage behaviour, and number portability sentiments.
- With an estimated mobile population of 55,000 devices, the goal was to maintain a survey confidence level of 95% and a margin of error of no less than 5%. This calculates the sample size for completed surveys to be 382.
- Analyse data collection and identify key markers.

Overview of Methodology Process

The survey method was chosen as the most effective strategy to collect data for the market research. Given the prevalence for mobile and computer usage, the main distribution method selected was the internet using online software. This enabled the quick organisation of results and ability to track the progress of respondents. The online software allowed the monitoring of respondents specially to

keep watch on whether they were completing the survey, if changes were necessary, and allowed for the ability to eliminate double entries.

The survey contained a total of 35 questions, however sections could be skipped depending on your mobile usage behaviour. The respondents were asked a range of questions such as demographics, mobile usage, fixed line usage, and most importantly, feelings towards switching their number. We limited the variation of questions to ensure completion of the survey in under 3 minutes. To achieve the set target multiple strategies were used:

Strategy 1- Online

An online questionnaire was created and distributed as a method of random sampling. Dedicated URL's for the survey collected data from specific segmentations such as social media, email lists, and the mobile providers. The social media URL was published on the Commissions Facebook page and advertised on multiple Facebook group pages. Responses to this link was steady but slow.

Emails of the survey were dispatched from Outside the Box personal database. Using the list, correspondences were sent via email to a broad spectrum of respondents from all over the country. During the initial stage, the customer response rate was proficient, however, the response rate decreased drastically after ten days. By design, surveys tend to have the highest response rate within their first week.

Strategy 2- Mobile Providers

Dedicated URL links were created for both local mobile companies that linked back to the online survey. These links were asked to be distributed to their customer base via email or text message. Clicking on the link directly connected the mobile user to the questionnaire online.

As a result, the number of survey responders increased. This variation to the strategy was more effective with FLOW than with Digicel. A resounding 34% of responders used the FLOW link while 2.5% of collected responses derived from the Digicel link. (Please note this does not reflect the total amount of responses from Digicel and FLOW customers, but only those that used the online link.)

Strategy 3- Interviewers

To ensure the validity of the data, Outside the Box elected to include in person surveys to be completed in addition to the internet survey collection. The purpose was to ensure survey completion and representation from all social groups in the country. Using a mixed method of convenient sampling and random sampling, qualified persons were picked from each of the major islands. Specific targets were forecasted to the interviewers to cover the Spanish community, ex-pat community, Haitian community, and more. The interviewers collected 45% of the responses received, increasing not only our completion rate but our confidence level in collected data.

Data Analysis Methodology

Answers collected were uploaded onto the online database for evaluation. The collected data was further analysed for average responses and correlations and is expounded upon below.

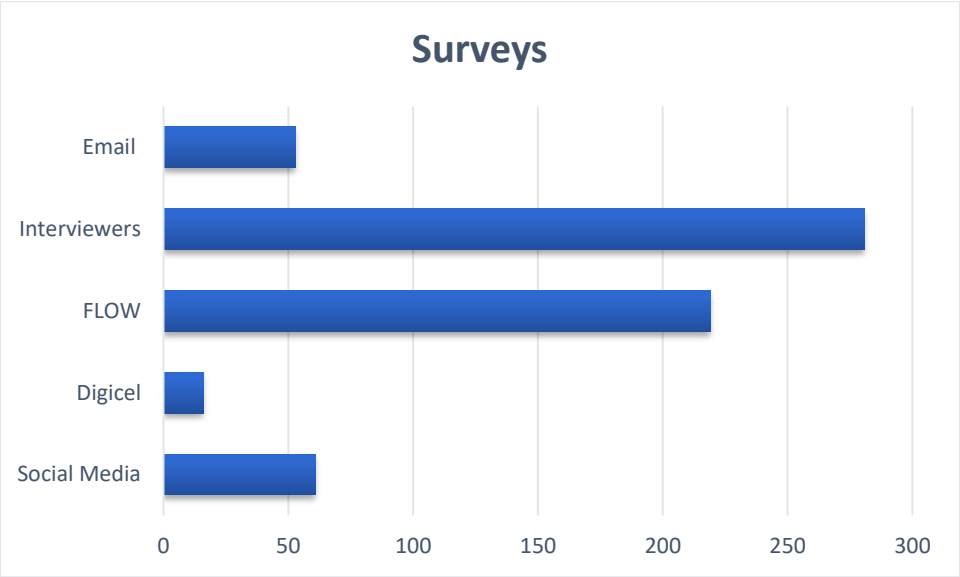
Data Analysis

In order to truly make sense of the data collected through the survey, a detailed analysis was conducted to gleam information that is not obvious in the totalling of answers to the questionnaire. Looking at the basic survey data you can determine how many persons are willing to switch networks or use prepaid or postpaid. But deeper analysis is necessary to answer questions such as of those who are willing to switch networks how many of them are postpaid or prepaid customers. Indepth analysis such as this helps to better determine the attitudes and practices of the participants.

A complete analysis of areas such as demographics, mobile usage, fixed line service, and number portability was conducted to paint a clearer picture of the desires for number portability among the populace.

Survey Demographics

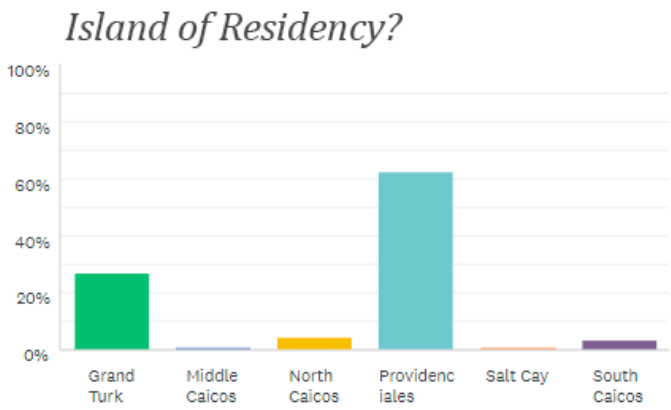
Survey Completion List



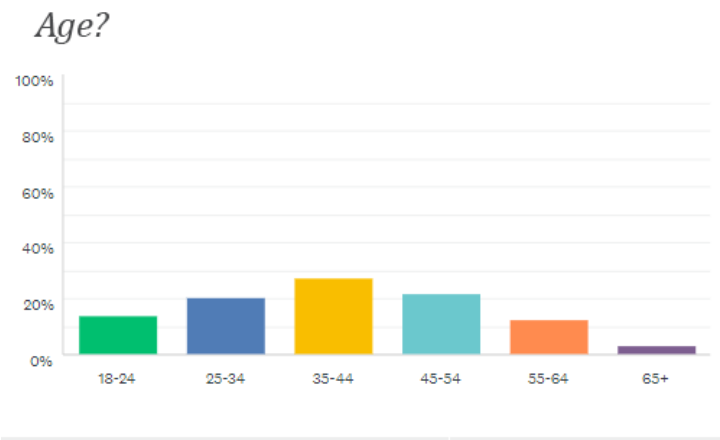
The survey contained a total of 630 responses overall. This includes completed surveys as well as abandoned surveys. From the collected surveys 34% of the responses derived from the FLOW URL survey link. Our interviewers were sanctioned to cover different community groups around the islands to ensure a complete perspective of the different social groups in the country. They achieved a response rate of 45%, all of which were completed. The overall completion rate of the survey amounted to 87% which is significantly high by industry standards.

People

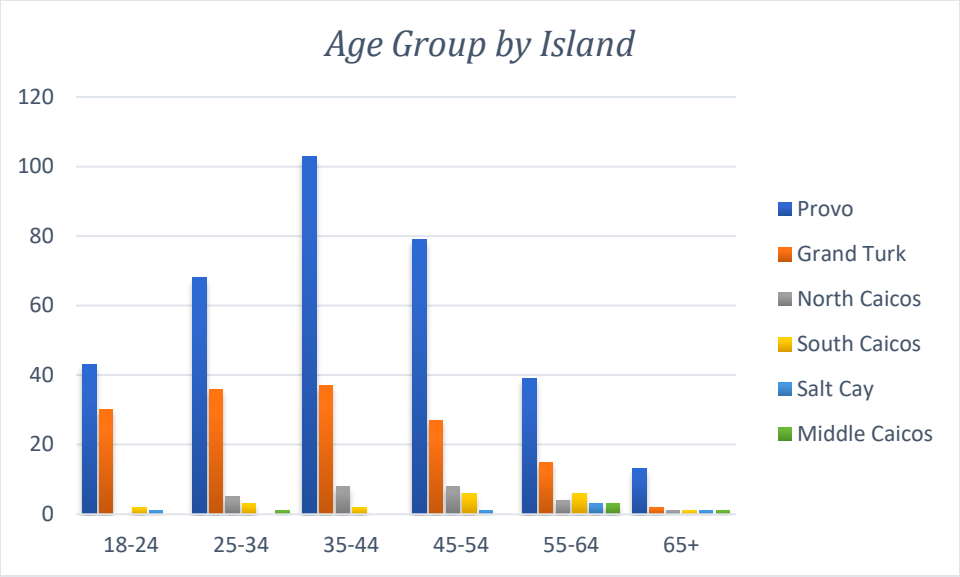
Hereonin, information expressed is calculated based on the number of completed surveys.



In the multi-method data collection, a calculated 62% of completed surveys derived from residents on the island of Providenciales. The second largest collector was Grand Turk with nearly 27%. As the two most populated islands, this is a great representation of the population of the country at large. These responses were collected through both online and in person interviewing.



The major age group of responders were in the 35-44 age group, representing 27% of the responders. Closely following were the 45-54 age group and 25-34 age group representing 22% and 20% of the completed surveys respectively.

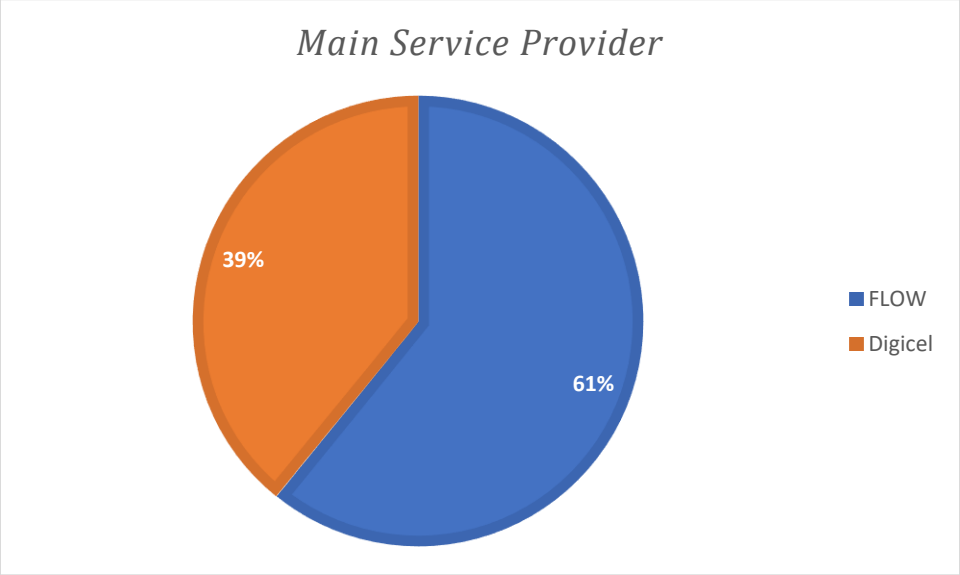


In the collection of responses by island, divided up by the age group there are a few consistencies. The 35-44 age group is heavily represented from each island. Also notes is a collection of responses from each age group on each island, which can be attributed to the variety of ages of our interviewers and their use of their peer groups.

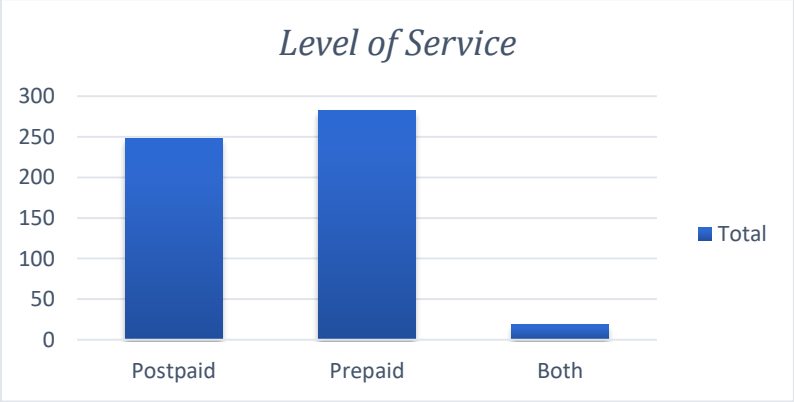
There was a near perfect collection of responses from male and female responders with 54% of completed responses belonging to females and 45% of responses belonging to male participants. That lowers the implication of gender preferences in the resulting data.

The results from the survey also showed that 87% of responders reported to be employed or self-employed. The remaining 13% identify as either retired, students, or unemployed.

Mobile Usage
Prepaid vs Post Users

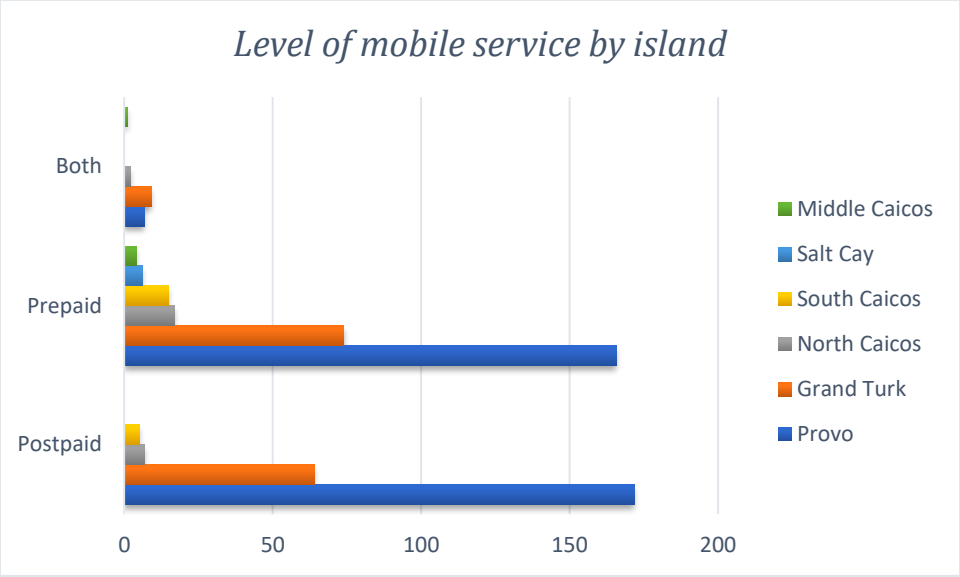


With the significant amount of our survey responders deriving from the dedicated URL for FLOW, it is without wonder that FLOW is seen as the favoured main service provider in our results. A significant amount of 39% reported Digicel as their main provider (220 responders). Despite the considerable difference, this is an area that can be further examined as it can also indicate a majority preference for one network over the other. 66% of responders noted some level of satisfaction with their main service provider.

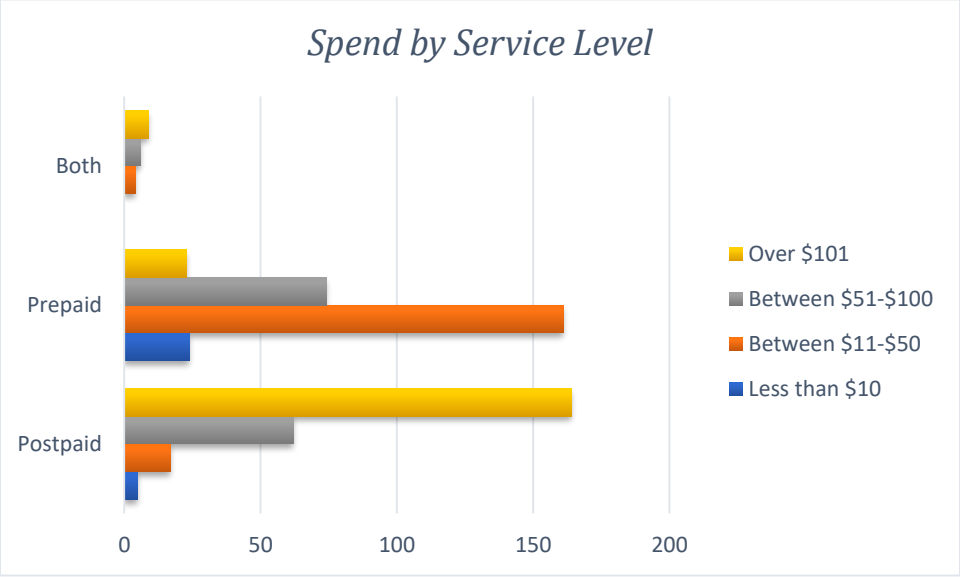


Of the survey participants a slight majority of 51% were marked as having prepaid service. From the chart above there is a seemingly close split between prepaid and postpaid users with an insignificant amount using both. However, from our interviewer feedback, some of those who reported as having multiple phones/sim cards also reported their services to be from the same genre. In other words,

participants with two mobile sims may have two sims of the same service level. The 3% who reported having both services were rare.



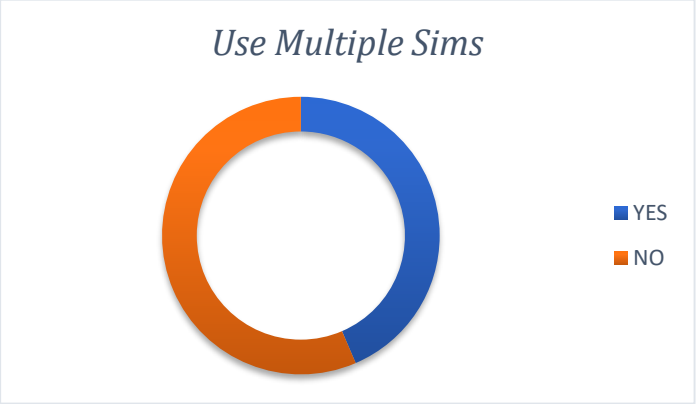
When evaluating the level of service of mobile users by island, there is not a significant difference between prepaid and postpaid. Providenciales has a slight increase in postpaid usage over prepaid usage, while Grand Turk has a slight increase in prepaid usage over postpaid usage. But the difference between the two are minimal. What was noteworthy is the increase of individuals who have both prepaid and postpaid in Grand Turk versus the amount recorded in Provo.



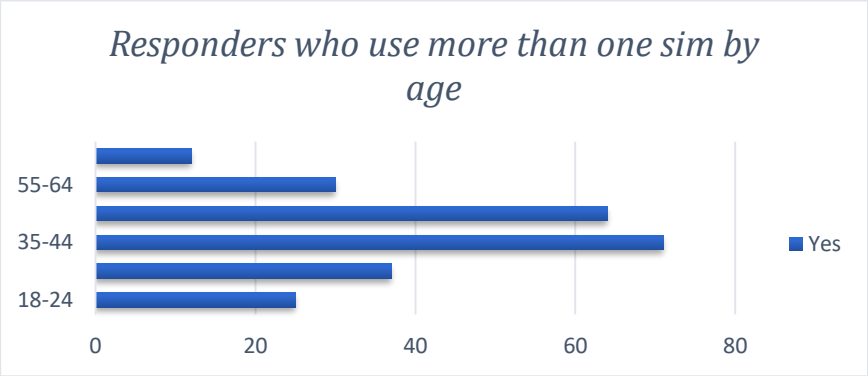
Data collected on expenditure of service proved interesting when compared with the level of service. Majority of prepaid responders reported spending between $11-$50 monthly on their phone service,

while the majority of postpaid customer reported spending over $101 on their phone service. In marketing terms this could represent a huge differentiator for enticing those loyal to their numbers to switch networks. There is room here to further study whether the prepaid customers utilise monthly plans and the average cost of these plans.

Multiple Sims/Handsets



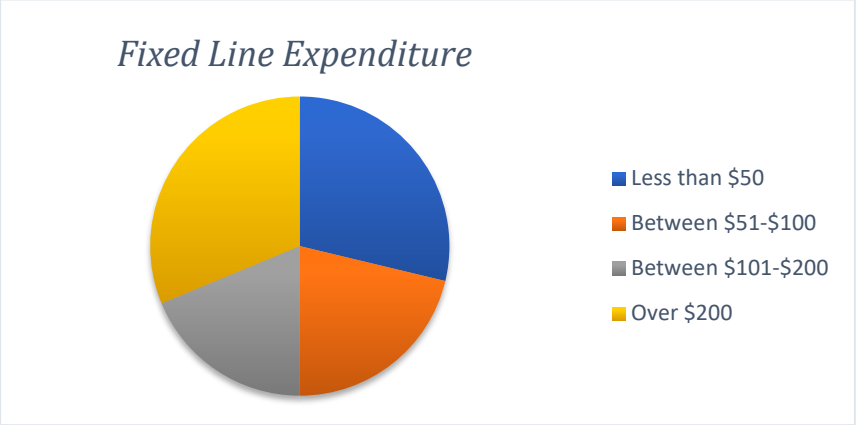
In total, data collected shows that 44% of responders use multiple handsets regularly and maintain more than one sim card. While this is not a majority of mobile users it's a significant amount of individuals with multiple devices from different carriers to consider. In evaluation of the usage of their mobile devices an overwhelming 64% say they use their handsets (single handset and multi handsets) for both business and personal use. Those who use multiple sim cards claim its due to the different features/services on the other network.



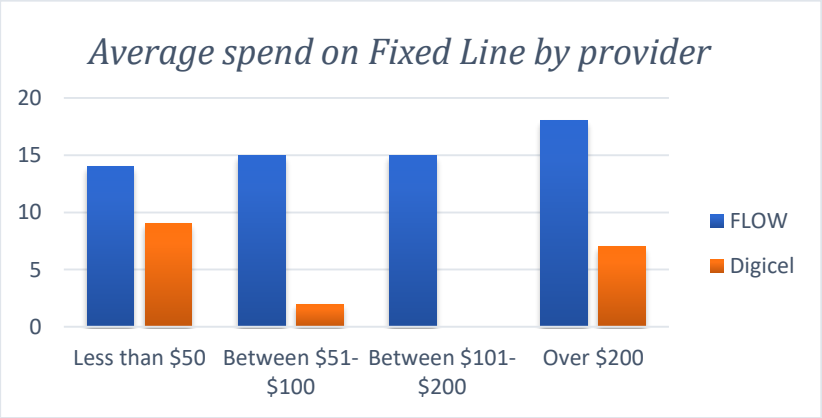
Those in the age range of 25-34 are noted to be heavy mobile data users. However, in this instance, we cannot assume them to be heavy users of multiple sims or multiple phones. Our data shows that those in the age range of 35-44 reported a higher instance of multiple sims use followed by the older 45-54 age group. This is significant in identifying which group is more likely to be affected by number portability.

Fixed Line and Calling Groups

In the section of the survey that focused on calling groups and fixed line services, the respondents qualified to answer this section dropped significantly. Of the completed surveys only 15% of participants reported being a part of a fixed line or business calling group. 70% of those who responded as having a fixed line service said they do not have multiple fixed line services. Those who have multiple fixed line service predominately have it to separate business and personal calls. 81% of reported fixed line users use FLOW as their main fixed line service. Significantly enough, 57% note some level of satisfaction with their fixed line service.



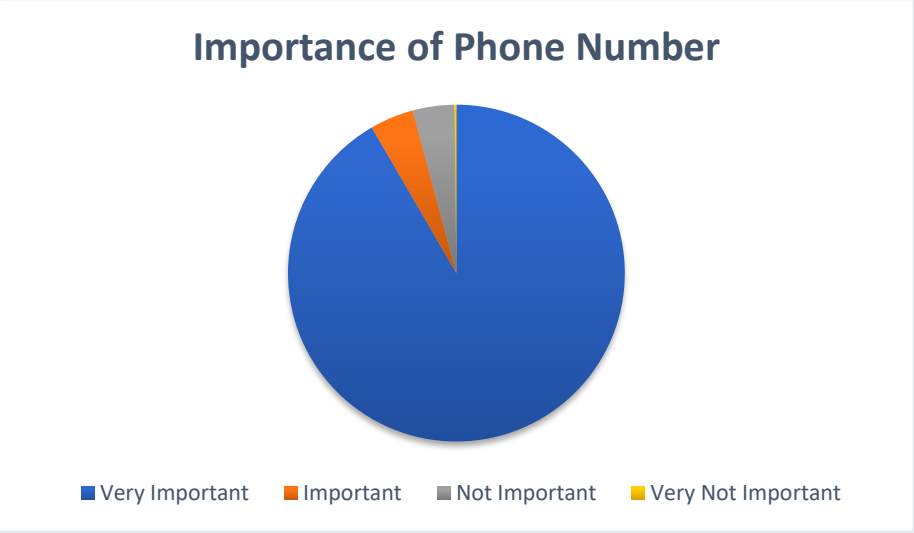
In regards to expenditure on fixed line services, 31% spend over $200 on their fixed line service monthly. While 28% spend less than $50 per month. Looking at the data purely from the characteristics given, there is no significance in selected choice of fixed line service by cost. Further study can be done here to determine if the selection in monthly cost is entirely for the benefits to the owner or other reasons.



When investigating the average spend on fixed line service by the provider, the data indicates that most FLOW fixed line responders pay over $200 per month for the service. The majority of Digicel fixed line responders reportedly pay less than $50 per month.

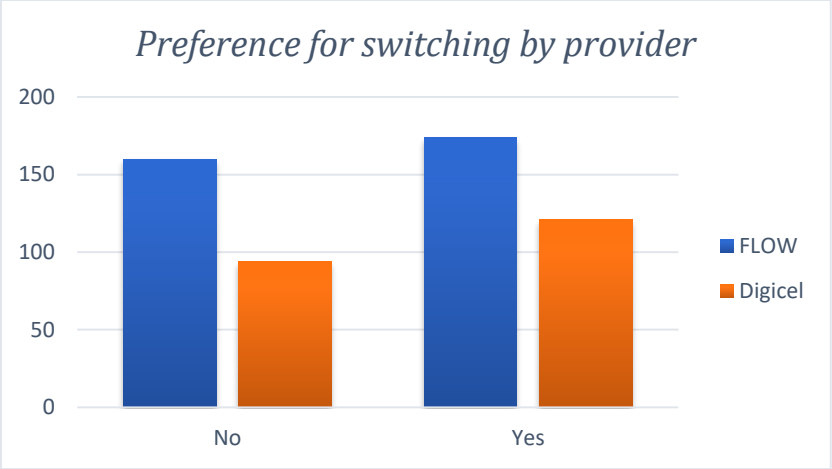
Number Portability

In the section of the survey relating to number portability a few interesting factors were discovered.



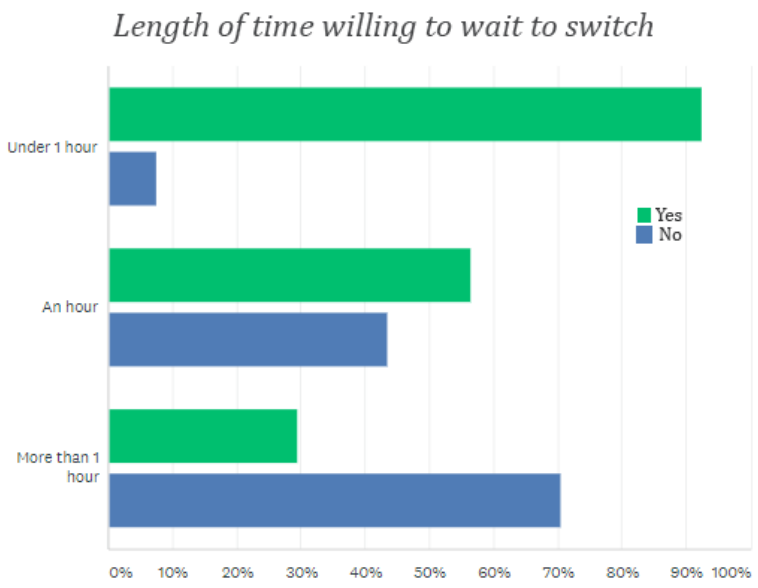
Our data collected shows a tremendous importance of personal numbers to most of the responders. In fact, 92% of those surveyed said their number was very important to them with a mere 4% marking their number as some level of unimportance. This is a significant factor for both this study and the marketing of telecommunications service in the Turks and Caicos. For a mobile provider it sights reluctance on behalf of the customer to change their phone service. For the Commission it is a clear indicator that customers are tied to their numbers. It is no figure that reportedly 71% of responders have NOT changed their mobile number within the last 5 years. These two factors signal a clear reluctance by most in changing their number.

Of those who noted to have changed their number within the last 5 years, 41% claimed it was for a better deal or value for money. They also reported convenience in changing their number and only 42% reported it taking less than a month to inform friends and family of the new number.



The data also shows that 53% would switch to a new provider if they could keep their number. This may indicate a clear split with people who are happy with their current provider. To investigate it further, the graph above breaks down the preference for switching by the indicated main service provider. The chart shows that 56% of Digicel responders would switch their network if they could keep their number and 52% of FLOW responders would switch to another network if they could keep their number. As it relates to the survey at hand, I do believe that is an area to be noted.

The number one reason (51% reported) people would switch to another network provider is for better price/value for money. Simplicity, speed, and cost were almost equally important for switching to another network.



Time is an important factor in customer's compliance in switching their number to a new provider. Majority of people would switch if it took an hour however, 70% said they would not switch if it took over an hour.

Of those who are willing to switch their number to a new provider, 53% are willing to pay to switch and keep their number. However, the cost of switching appears to be of great significance to the responders as only 20% would switch if the cost was more than $10. Also, an overwhelming 62% would prefer for the new service provider to switch their number.

Recommendations for the Future

The results of the data collection and market research points out very clearly the patterns and usage of mobile service users in the Turks and Caicos. We recommend consideration of the following factors in making your decision to deploy number portability:

1. 44% of mobile users in this survey use multiple phones/sims on a regular basis. Those who do are predominantly between the ages of 35-44 and up.

2. Mobile users in the Turks and Caicos are tied to their phone numbers. And are reluctant to change their number in the current state where number portability is not available.

3. Slightly more than 50% would switch to another network if they could retain their current number. Which from a marketing perspective could help one network gain more market share over the other.

4. Fixed line service is underwhelmingly used in the Turks and Caicos. Therefore, the facility to switch your fixed line service number to another service provider would not be a significant benefit to customers.

In conclusion, we overcame the challenges that were presented by using a little manoeuvring around obstacles. We were able to reach our target goal and collect creditable responses from the public. We worked hard to sample a true representation of the public and include persons from all nationalities and areas of the islands.

We thank you for the opportunity to work with you and look forward in furthering our relationship in the future.