



**TCI TELECOMMUNICATIONS
COMMISSION**

Public Opinion on Satellite Internet Services in the Turks and Caicos Islands

Survey Findings on the Potential Introduction of Starlink & Other
Satellite Providers

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BACKGROUND

The Turks and Caicos Islands Telecommunications Commission (TCITC) plays a critical role in shaping the nation's digital future. As an independent regulatory authority, the Commission is tasked with overseeing the licensing, regulation, and advancement of all telecommunications services across the country, from fixed-line and mobile operators to internet and spectrum users. Against a backdrop of increasing dissatisfaction with existing services and a growing interest in satellite technology, this report captures the findings of a national survey designed to gauge public sentiment on satellite internet solutions such as Starlink.

The future of telecommunications in the Turks and Caicos Islands is at a crossroads. With unlicensed satellite services already operating in the country and the growing public frustration with existing providers, the TCI Telecommunications Commission took the bold step to ask the people directly: what do you really want from your telecom experience?

This survey, conducted as part of the Commission's public consultation process, captures the voice of nearly a thousand residents from across the islands. It reflects not just service satisfaction levels, but deeper issues—about service reliability and access, operator competition, and the country's digital future.

What emerged from the data is a signal shift. A shift in expectations, a shift in trust, and a powerful push for progress. The findings summarized in the following pages offer a clear mandate—from the Turks to the Caicos Island chain: TCI is ready for better telecommunication connectivity.

OBJECTIVE

The main objective of this survey was to temperature-check the public's interest in and attitudes toward satellite services in the Turks and Caicos Islands. In addition to gauging demand for satellite offerings, the survey set out to:



Assess overall satisfaction with current telecommunications providers and services



Identify gaps in access and performance by island



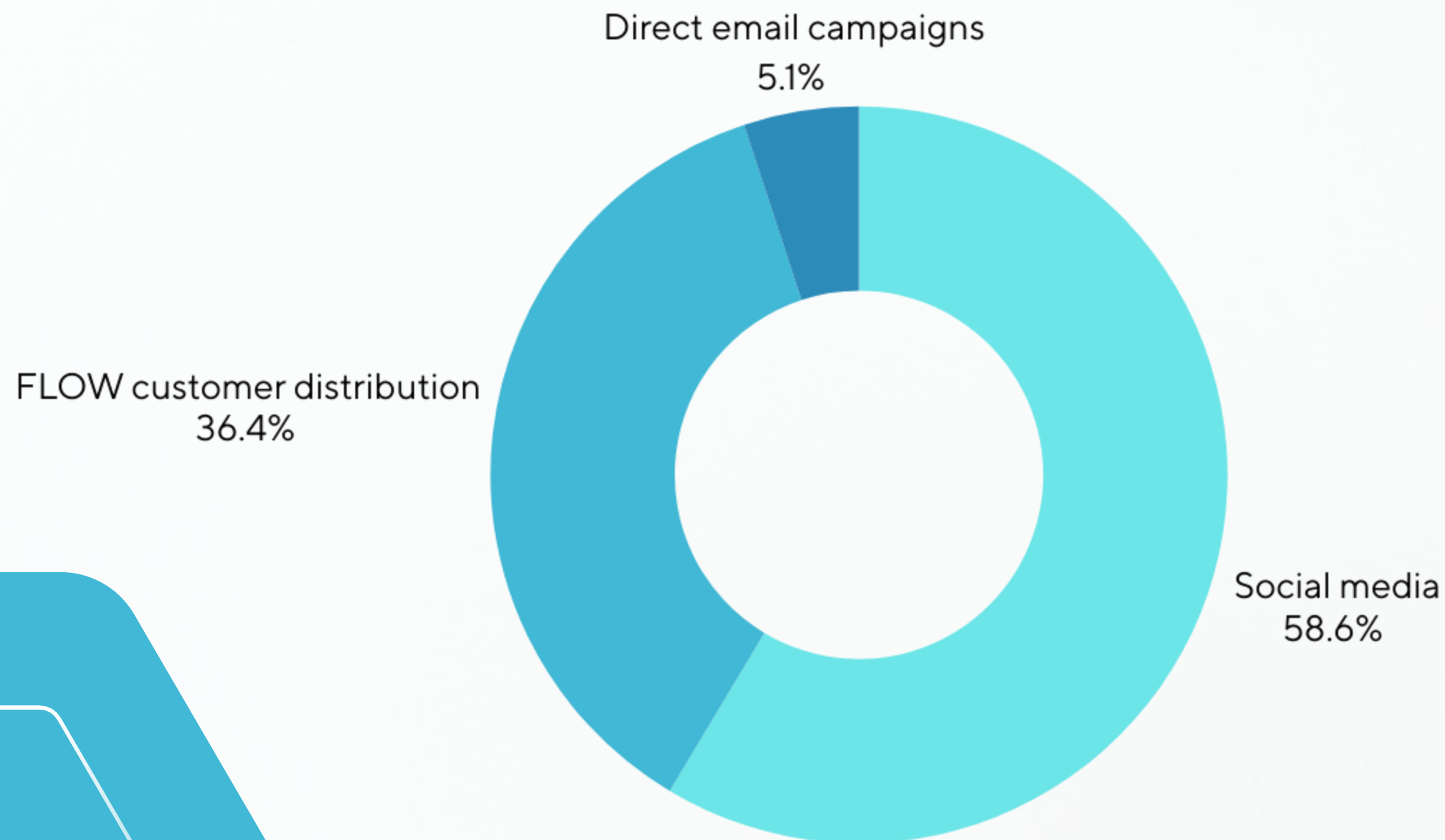
Capture customer preferences, pain points, and expectations for future service improvements

This input is critical to shaping public policy decisions and informing how satellite services might be integrated into TCI's telecommunications regulatory framework.



METHODOLOGY

The survey was conducted using an online survey platform and ran for one month. It was distributed through several channels to maximize reach and demographic diversity, including:



- To support balanced regional representation, an interviewer was engaged to collect responses in South Caicos, contributing to 11 of the 15 total responses from that island.
- Although both major providers were invited to share the survey, only FLOW participated in the distribution. In total, 988 valid responses were received, with a completion rate of 89%.
- The survey was open to the general public and targeted both residential and business users.

SUMMARY FINDINGS

Current Telecom Satisfaction Is Low

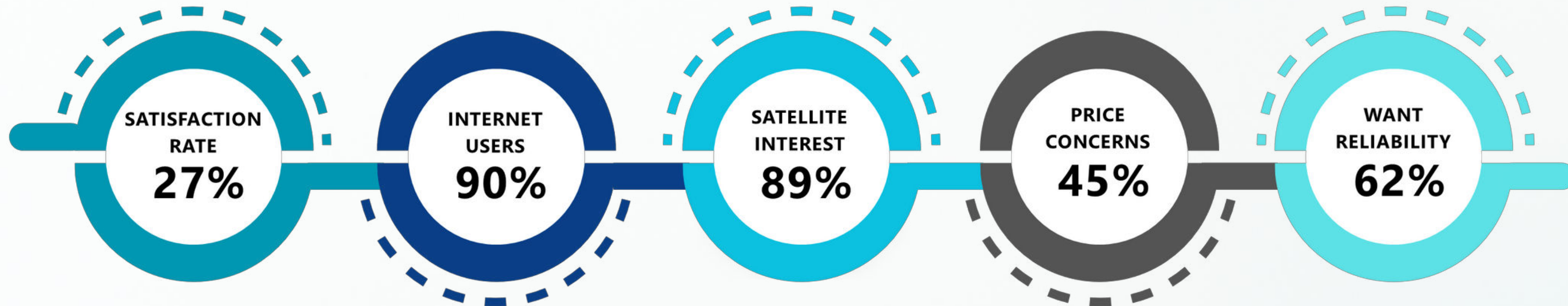
- Only 27% of respondents reported being satisfied with their telecom services, while 45% expressed dissatisfaction.
- Satisfaction varied by island—Providenciales scored highest at 36%, and Grand Turk and North Caicos lowest at 15–18%.

High Demand for Satellite Services

- 90% of respondents were familiar with satellite services like Starlink and HughesNet.
- 89% expressed interest in having satellite services available in TCI, with 58% reporting extreme interest.
- Interest was strongest in Grand Turk and North Caicos (90%+), where dissatisfaction with existing providers is highest.

Demand Driven by Reliability

- 62% want more reliable services, and 50% cited poor connectivity, especially in North, Middle, and South Caicos.
- 41% see satellite as essential for emergency preparedness, while others highlighted needs related to business, education, and remote access.



Discontent Is Consistent

- 90% of respondents currently use internet services, followed by 85% using mobile, and 30% using TV services.
- Across all service types, satisfaction levels hovered between 26–28%, while dissatisfaction ranged from 44–47%, highlighting system-wide underperformance.

Affordability and Privacy Are Major Concerns

- The top concern was price (45%), followed by privacy and security (28%).
- A vocal group raised concerns about Starlink and Elon Musk, indicating that the provider's reputation will impact adoption.

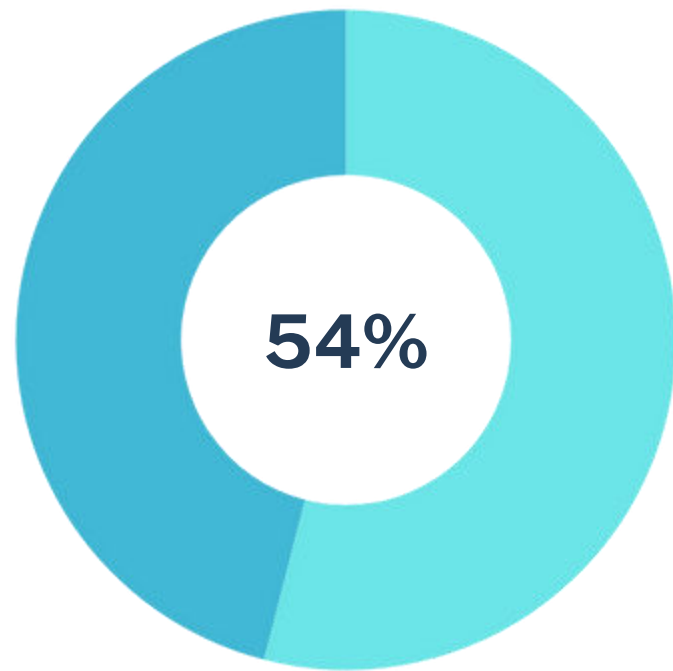


PART 1

DEMOGRAPHICS

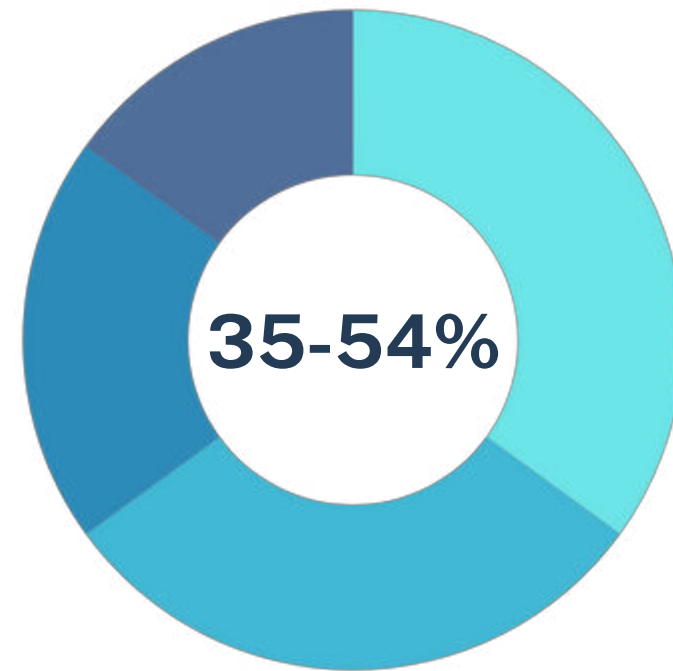


DEMOGRAPHIC MAKE-UP



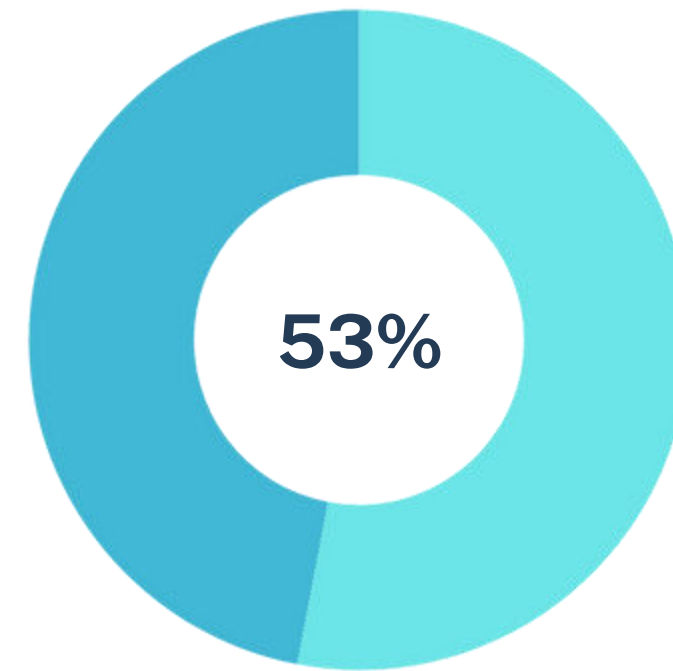
Gender

Just over a half of all respondents were male.



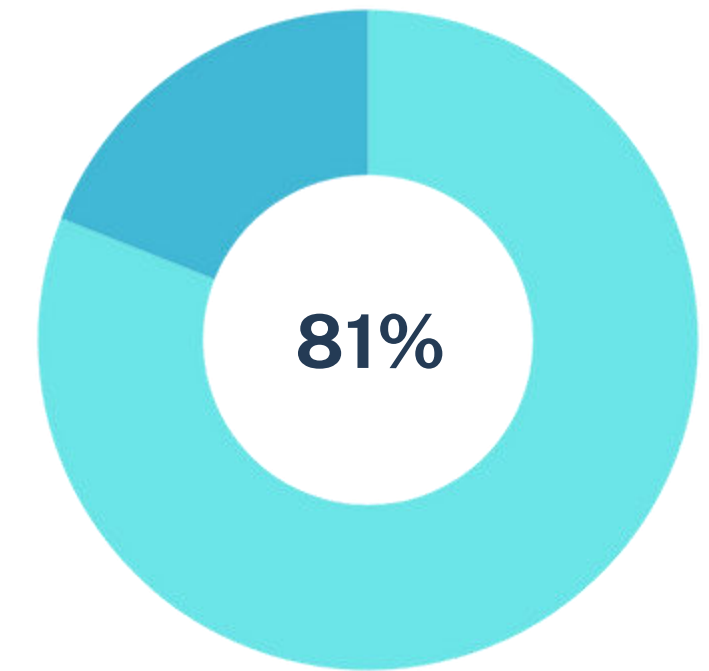
Age

Largest age spread was 35-54 years accounting for 50% of participants



Location

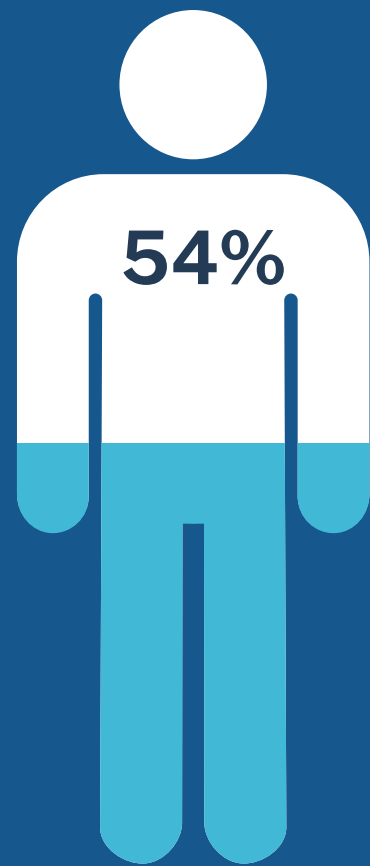
More than 50% of survey respondents live on the island of Providenciales.



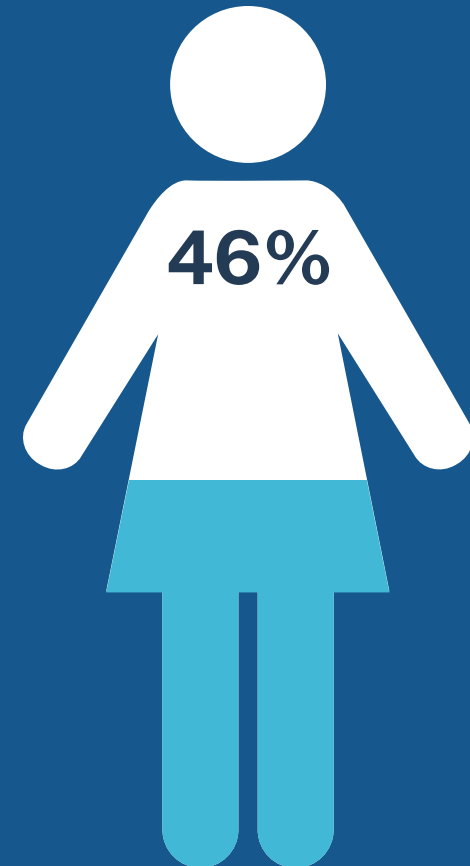
Category

The majority of survey respondents were residential customers (80.8%), followed by business customers at 13%.

GENDER



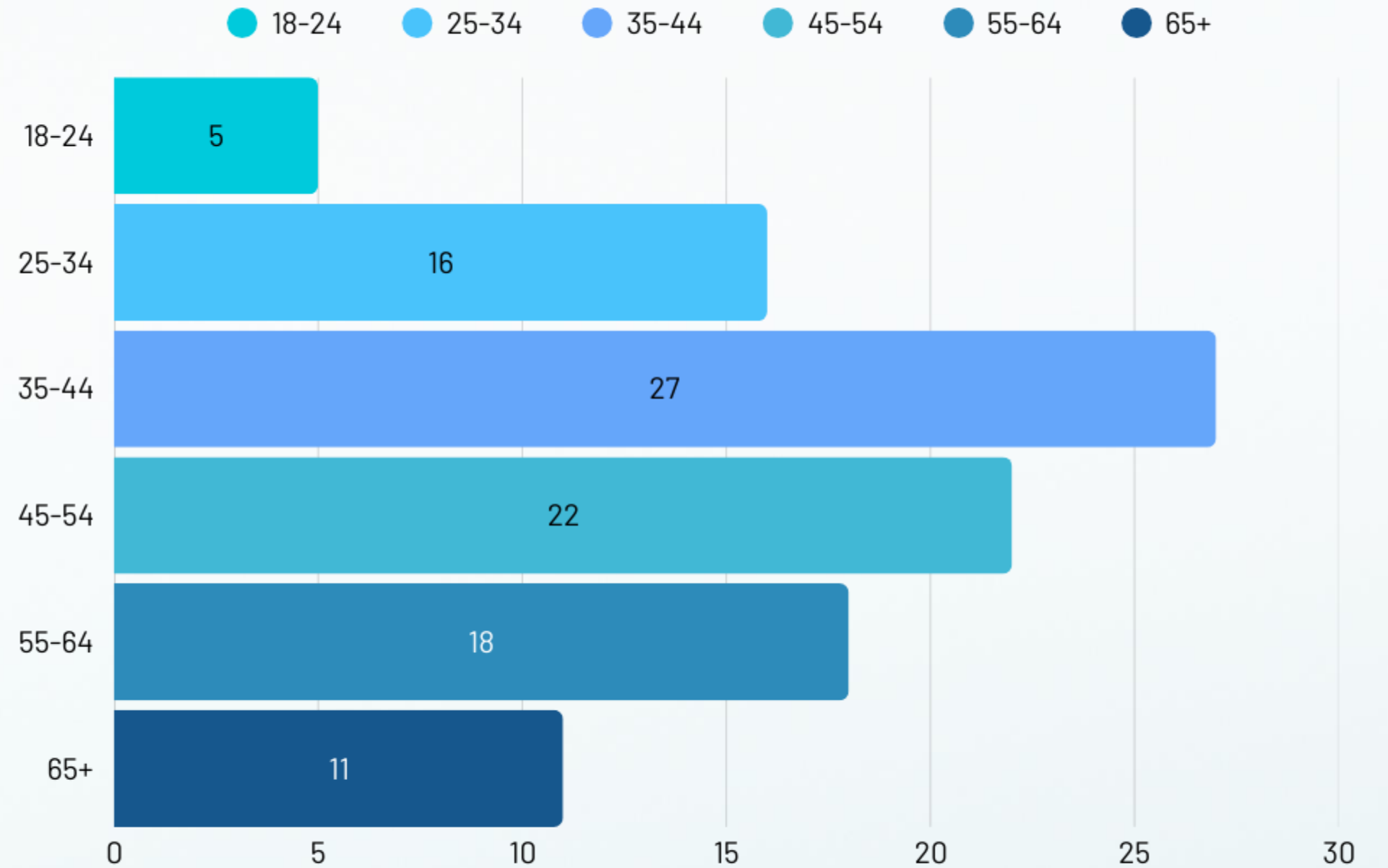
Male



Female

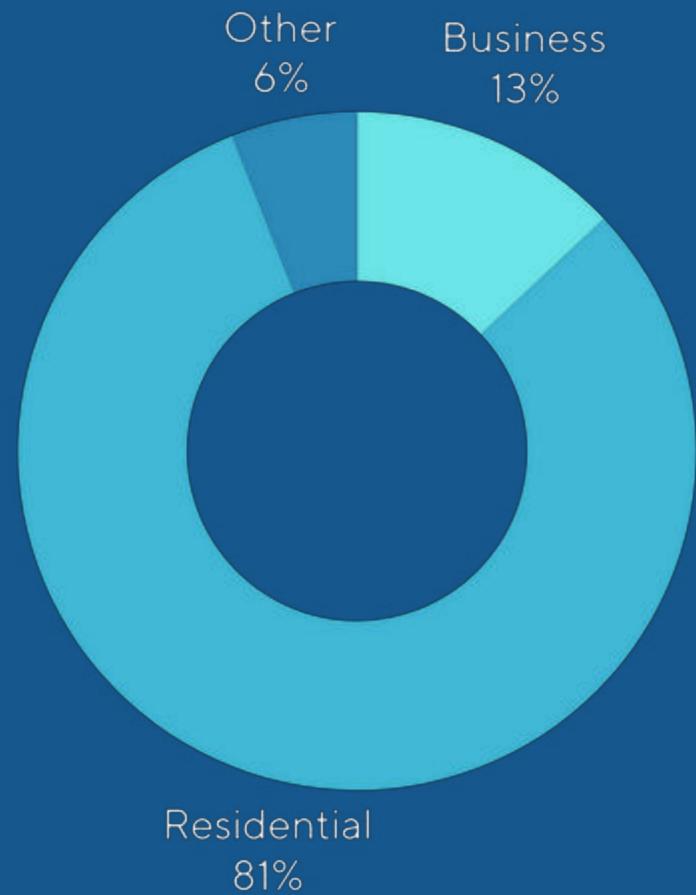
54% of respondents were males while 46% were females.

AGE



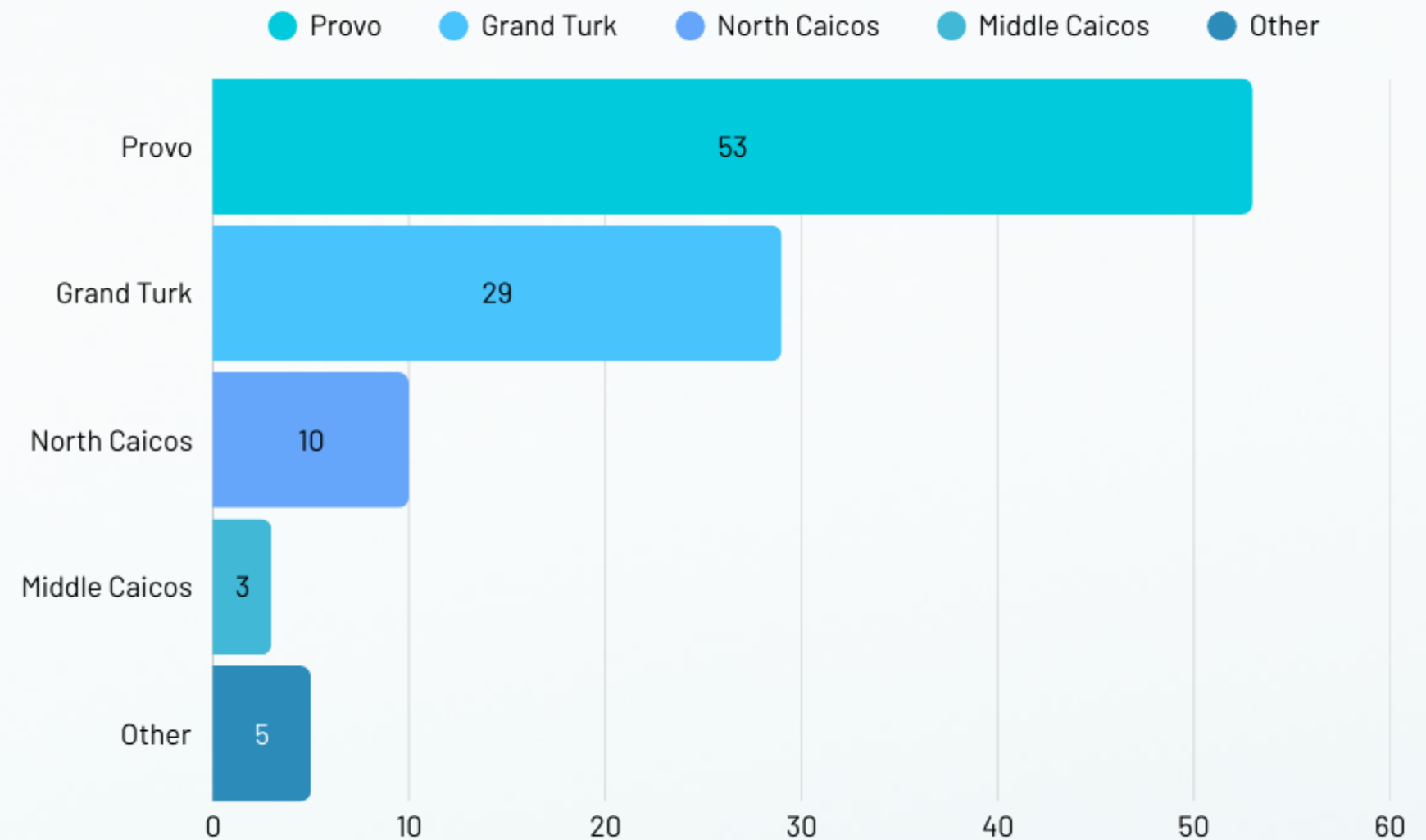
The age distribution for the sample was as follows: 5% were aged 18-24 years, 16% were aged 25-34 years, 27% were aged 35-44 years, 22% were aged 45-54 years, 18% were aged 55-64 years, and 11% were 65 and over.

TYPE OF CUSTOMER



- The majority of survey respondents were residential customers (81%), followed by business customers at 13%.
- 'Other' includes categories where percentages are less than 5%. Those in this category characterize themselves largely as part-time residents or both residential and business customers.

LOCATION



- Most survey respondents lived in the island of Providenciales (53%), followed by Grand Turk at 29% and North Caicos at 10%.
- 'Other' includes categories where percentages are less than 5%. This group is largely made up of respondents from South Caicos (n-14) and the island of Pine Cay (n-18).

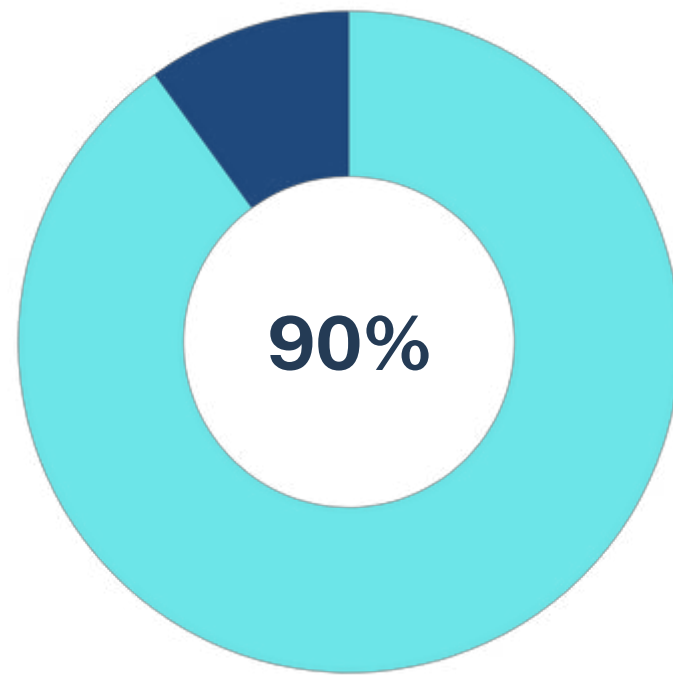


PART 2

CURRENT SITUATION

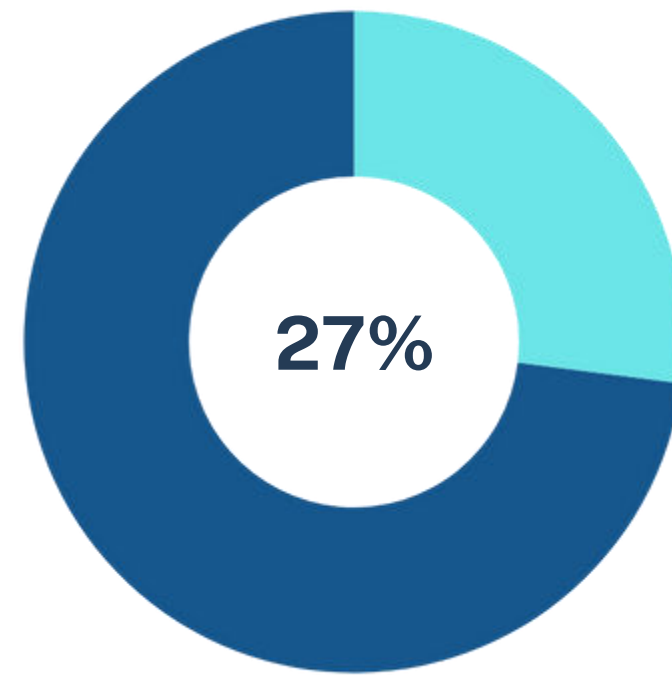


CURRENT SITUATION



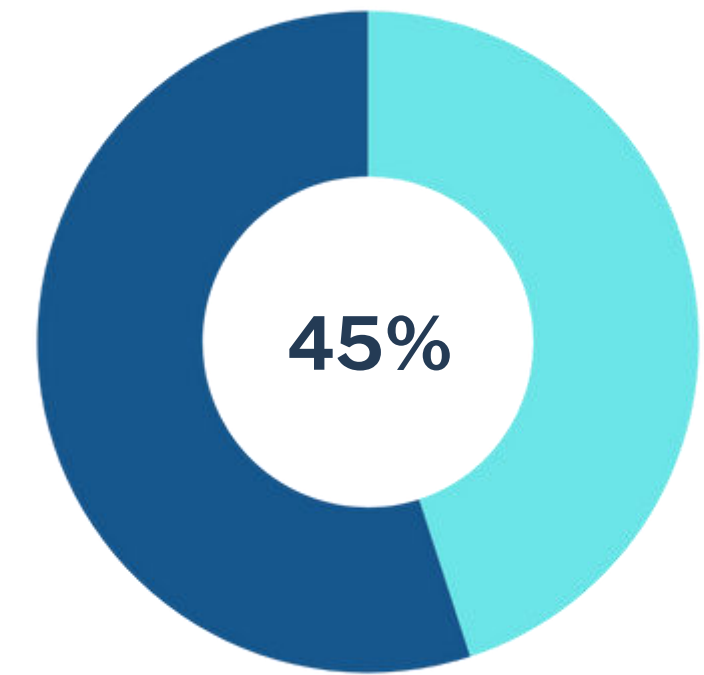
Type of Service

Internet services were the most widely used type of service among respondents.



Satisfaction

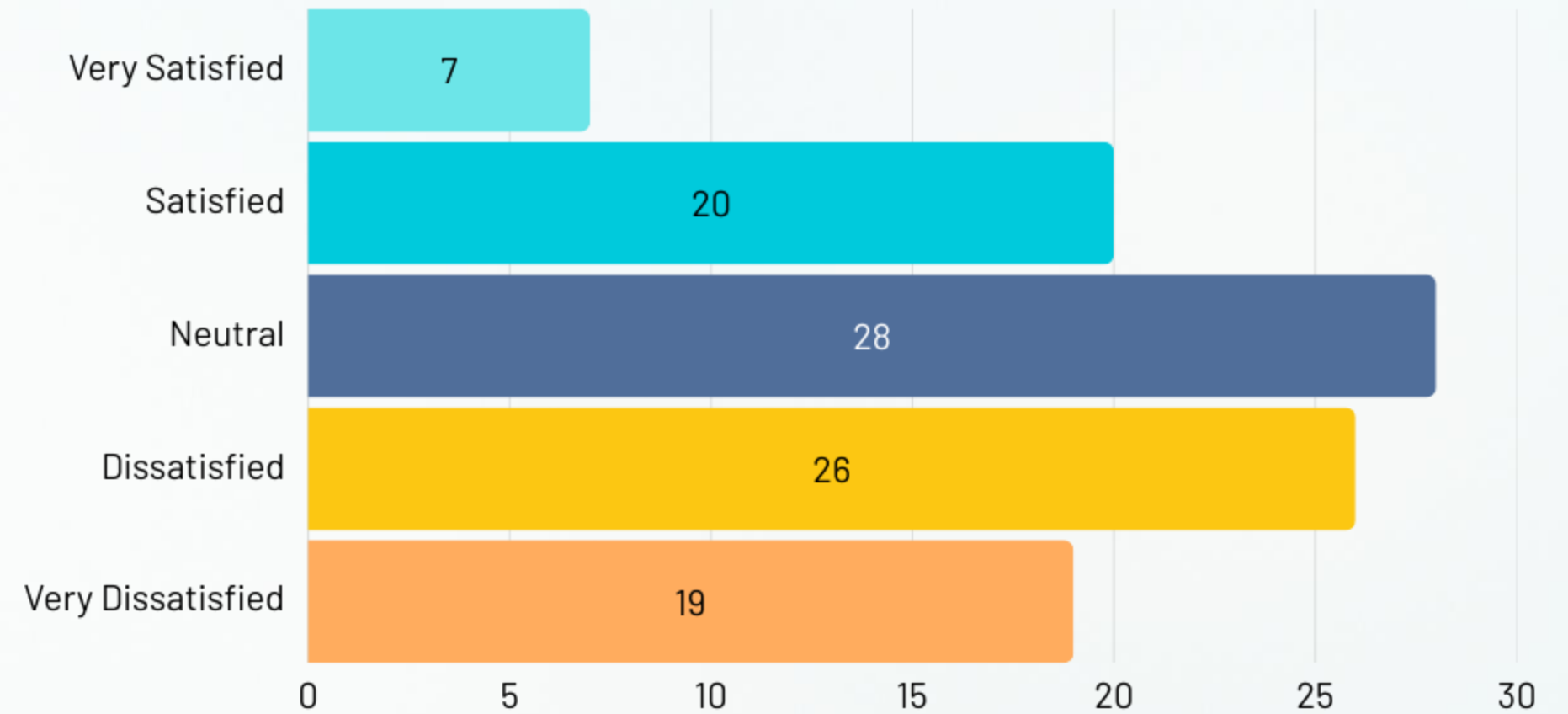
Just over a quarter of respondents indicated that they were satisfied with the type of service they use.



Dissatisfaction

Almost a half of respondents indicated that they were dissatisfied with the type of service they use.

HOW SATISFIED ARE YOU WITH YOUR CURRENT TELECOM SERVICES?



27%

Just over a quarter (27%) of respondents expressed satisfaction with their telecommunications services, with 7% being very satisfied and 20% satisfied. Conversely, 45% expressed dissatisfaction, that is, 26% who were dissatisfied and 19% who were very dissatisfied. These results highlight the need for improvements to address the concerns of dissatisfied customers.



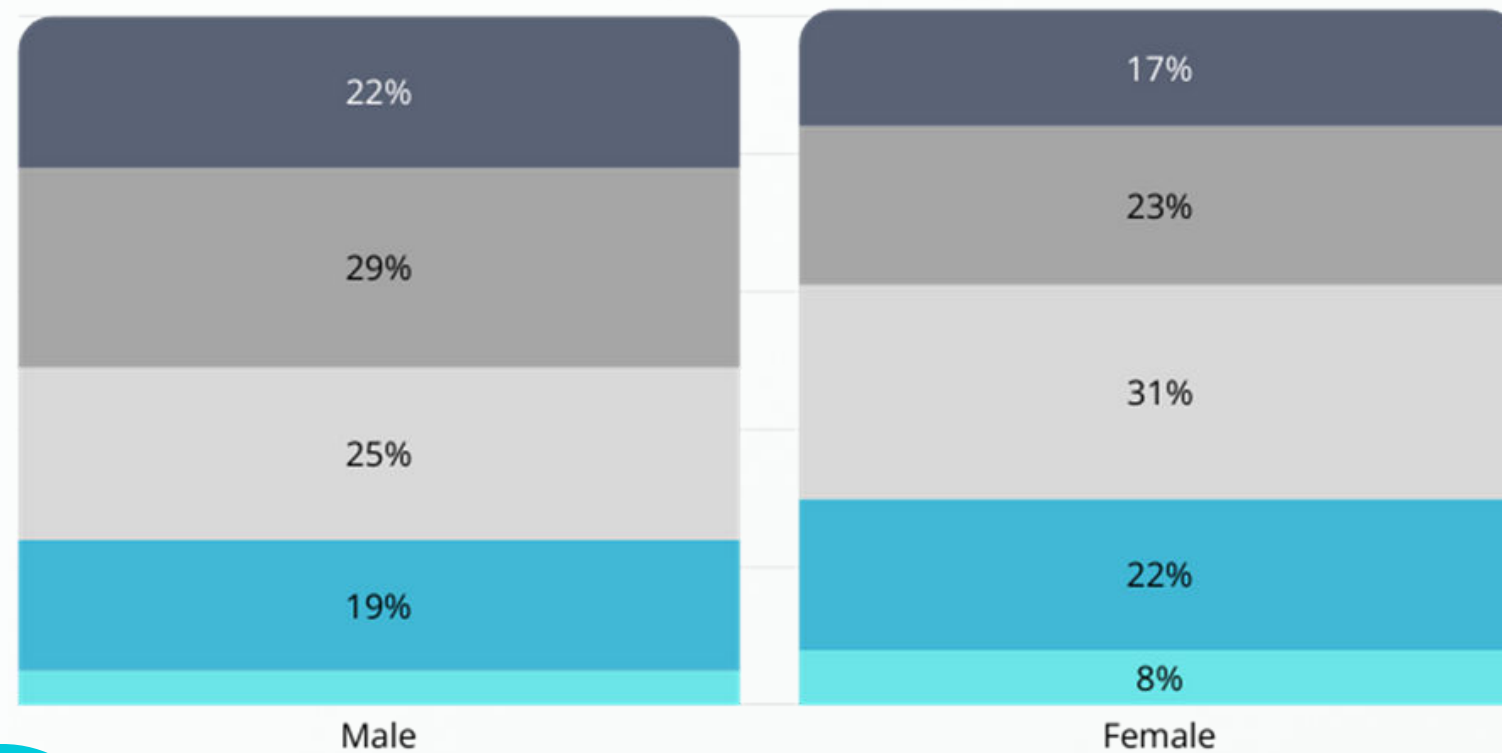
45%

*Satisfaction: sum of 'Very satisfied' and 'Satisfied' percentages; Dissatisfaction: sum of 'Very dissatisfied' and 'Dissatisfied' percentages.

HOW SATISFIED ARE YOU WITH YOUR CURRENT TELECOM SERVICES?

GENDER

● Very satisfied ● Satisfied ● Neutral ● Dissatisfied ● Very dissatisfied

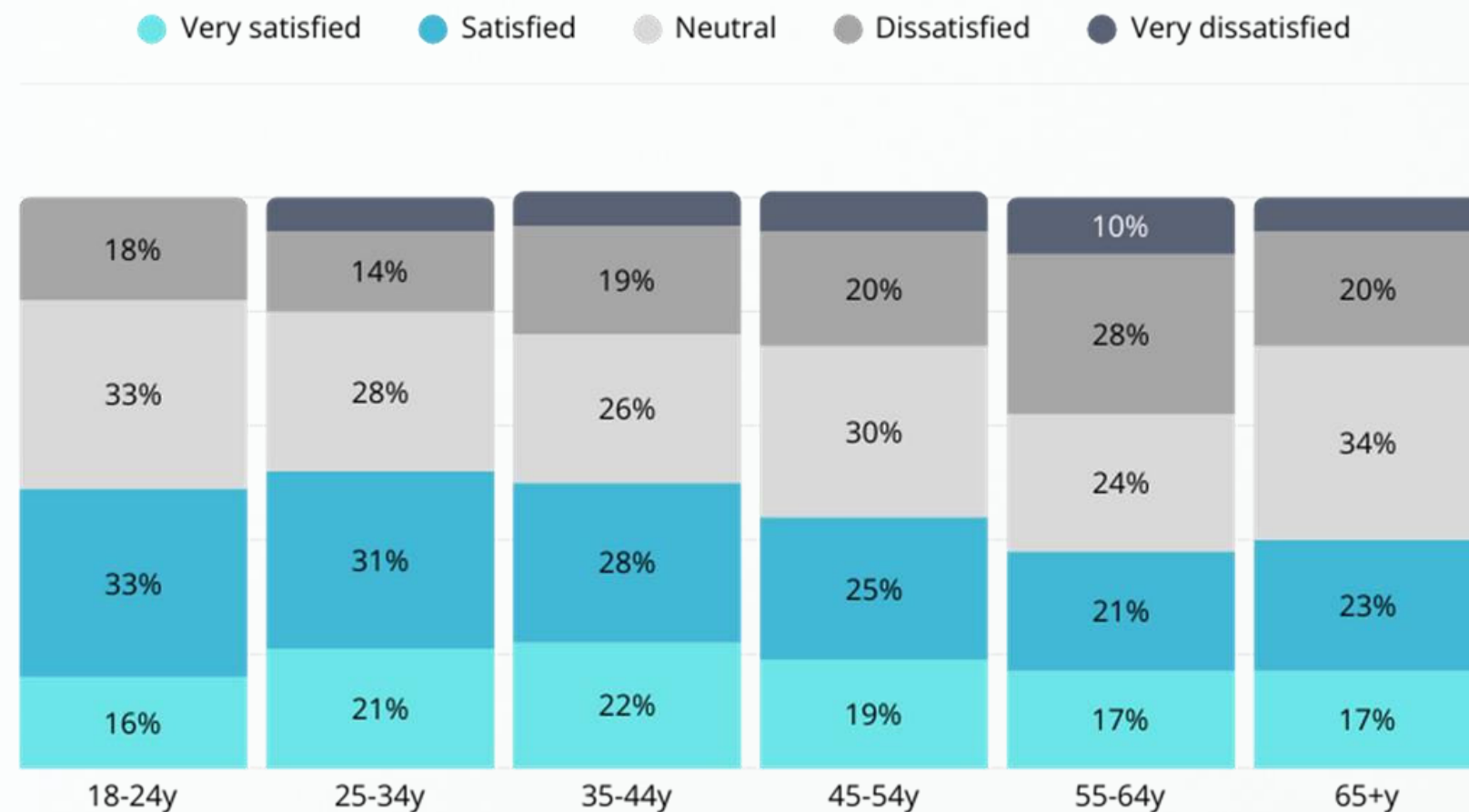


- 30% of females versus 24% of males expressed satisfaction with their telecommunications services.
- Conversely, 40% of females versus 51% of males expressed dissatisfaction while another 31% of females and 25% of males rated the services as neutral.

*Satisfaction: sum of 'Very satisfied' and 'Satisfied' percentages; Dissatisfaction: sum of 'Very dissatisfied' and 'Dissatisfied' percentages.

HOW SATISFIED ARE YOU WITH YOUR CURRENT TELECOM SERVICES?

AGE

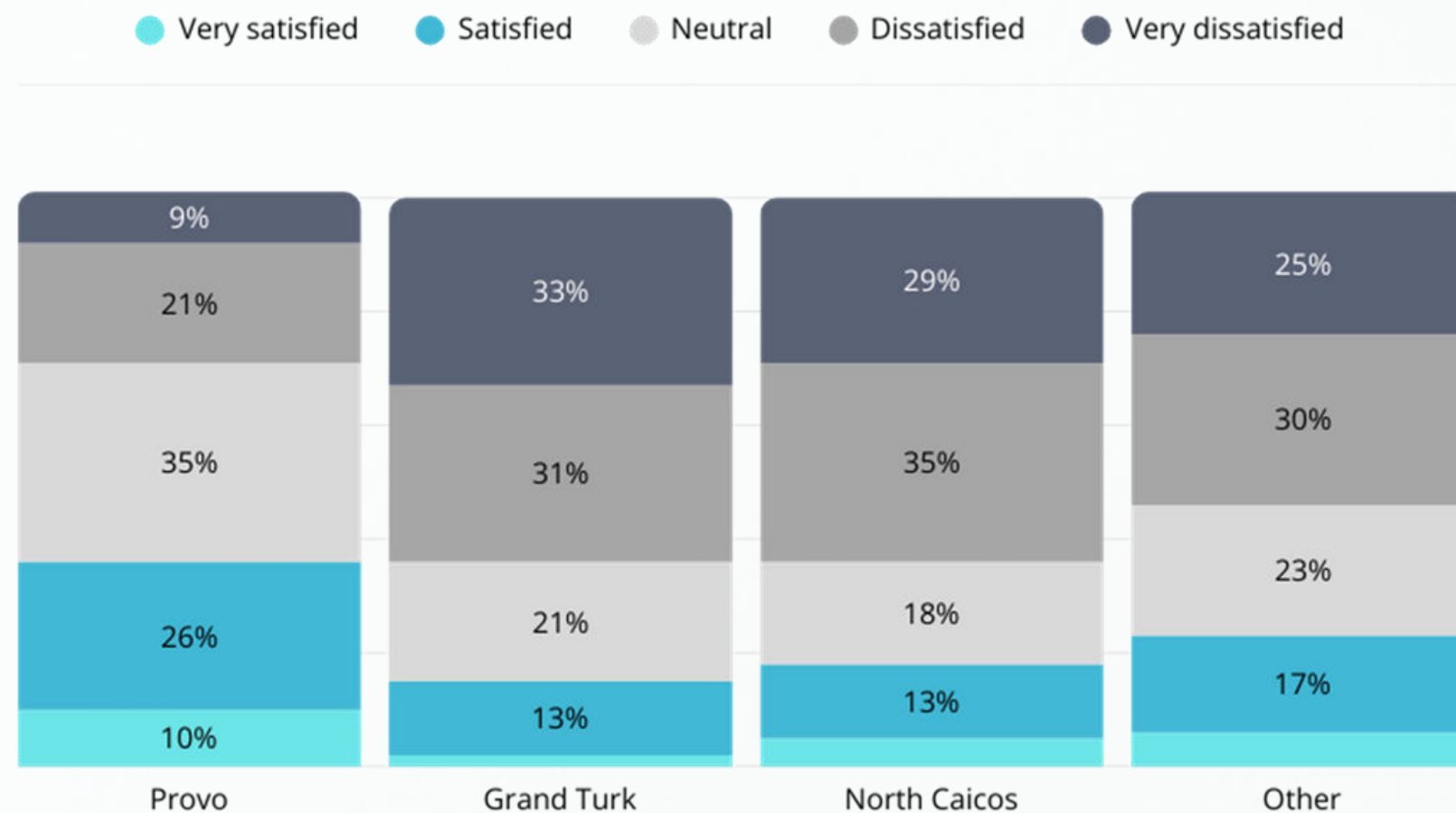


- 54% of respondents 25-34 years, 50% of respondents 35-44 years, and 49% of those 18-24 years were most likely to express satisfaction with their service.
- On the other hand, 38% of respondents 55-64 years, 27% of respondents 45-54 years, and 26% of those 65+ years most expressed dissatisfaction.

*Satisfaction: sum of 'Very satisfied' and 'Satisfied' percentages; Dissatisfaction: sum of 'Very dissatisfied' and 'Dissatisfied' percentages.

HOW SATISFIED ARE YOU WITH YOUR CURRENT TELECOM SERVICES?

LOCATION



- 36% of respondents in Providenciales, versus 18% in North Caicos and 15% in Grand Turk expressed satisfaction with their service.
- Conversely, 64% of respondents in Grand Turk and North Caicos respectively, expressed dissatisfaction.
- Caicos Islands respondents exhibit a similar level of dissatisfaction across the board. This compares to 30% of Providenciales in the same respondent group.

*Satisfaction: sum of 'Very satisfied' and 'Satisfied' percentages; Dissatisfaction: sum of 'Very dissatisfied' and 'Dissatisfied' percentages. 'Other' includes categories where percentages are less than 5%.

HOW SATISFIED ARE YOU WITH YOUR CURRENT TELECOM SERVICES?

TYPE OF CUSTOMER

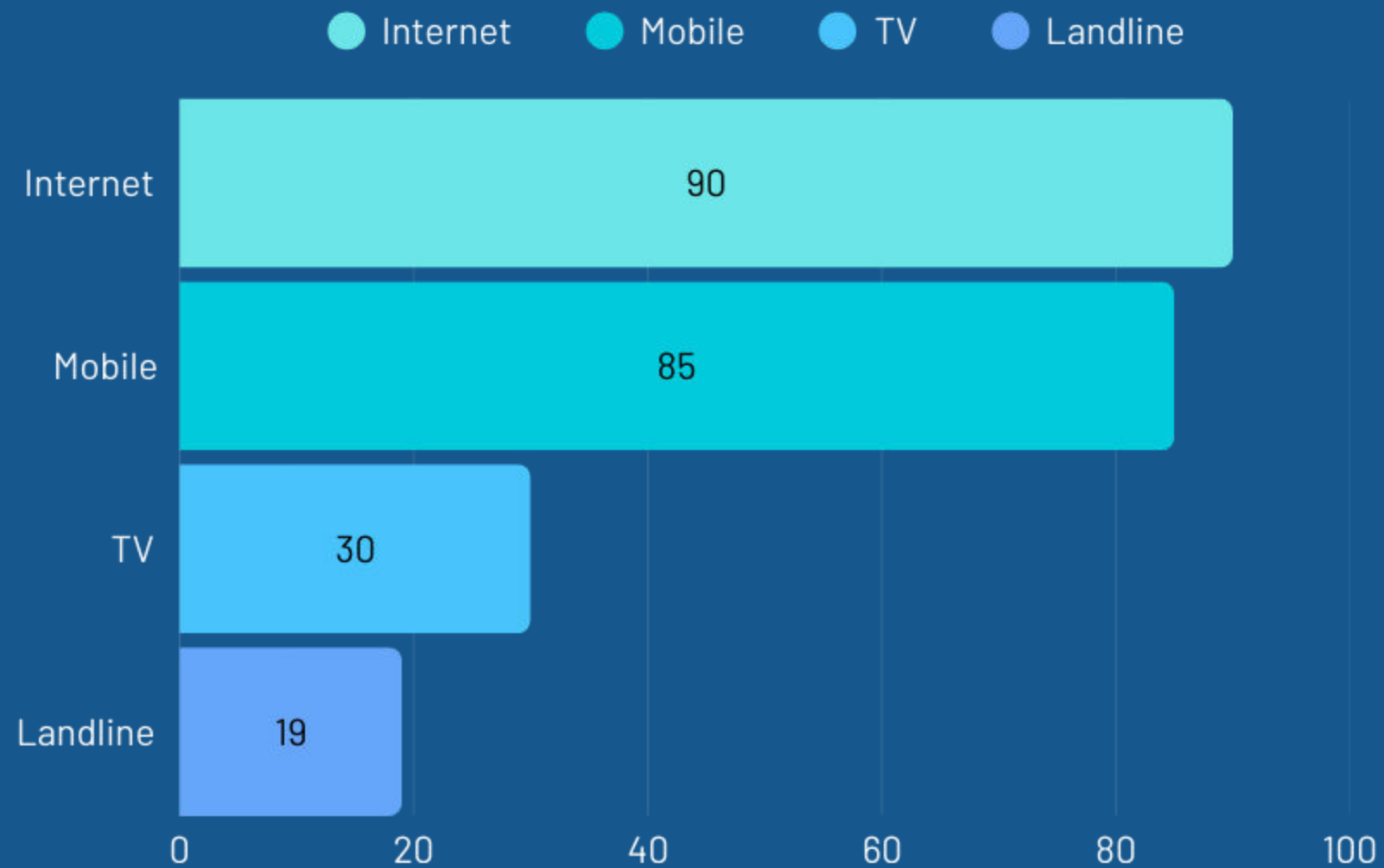


- 26% of residential-only customers versus 28% of business-only customers expressed satisfaction with their telecommunications services.
- Conversely, 47% of residential customers versus 40% of business customers expressed dissatisfaction.

*Satisfaction: sum of 'Very satisfied' and 'Satisfied' percentages; Dissatisfaction: sum of 'Very dissatisfied' and 'Dissatisfied' percentages. 'Other' includes categories where percentages are less than 5%.

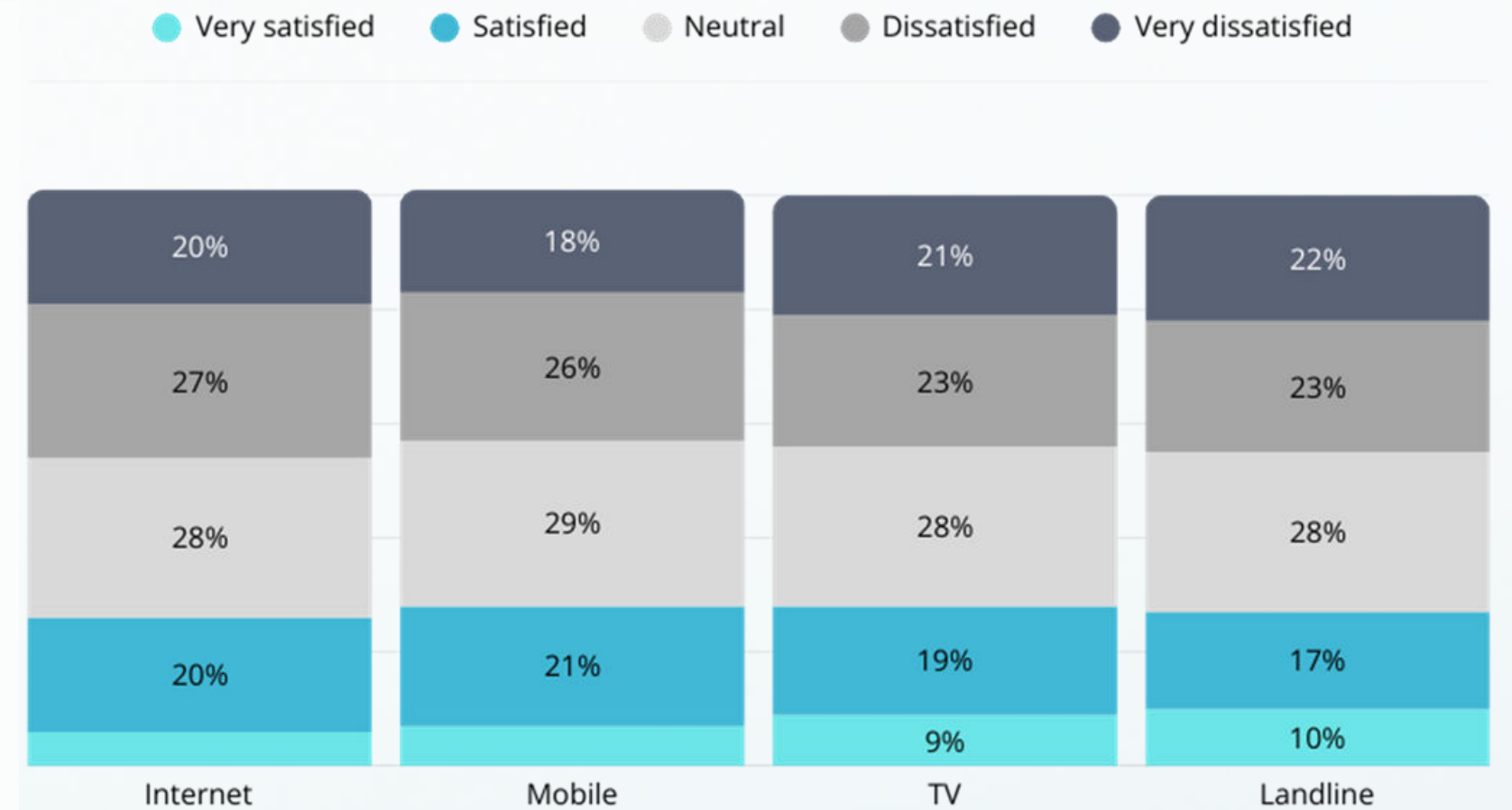
WHAT TYPES OF TELECOM SERVICES DO YOU CURRENTLY USE?

TYPE OF SERVICE USED



- Currently, 90% of respondents use internet services, including Cable, DSL, Fibre, Wireless, or Satellite. Additionally, 85% have mobile services, while 30% use television services such as Cable and Satellite, and 19% have landline services.

SATISFACTION LEVEL



- The level of satisfaction with telecommunications services is consistent, ranging between 26% and 28% across the various types of services offered.
- Likewise, dissatisfaction levels show little variation, falling between 20% and 22% regardless of the service type.

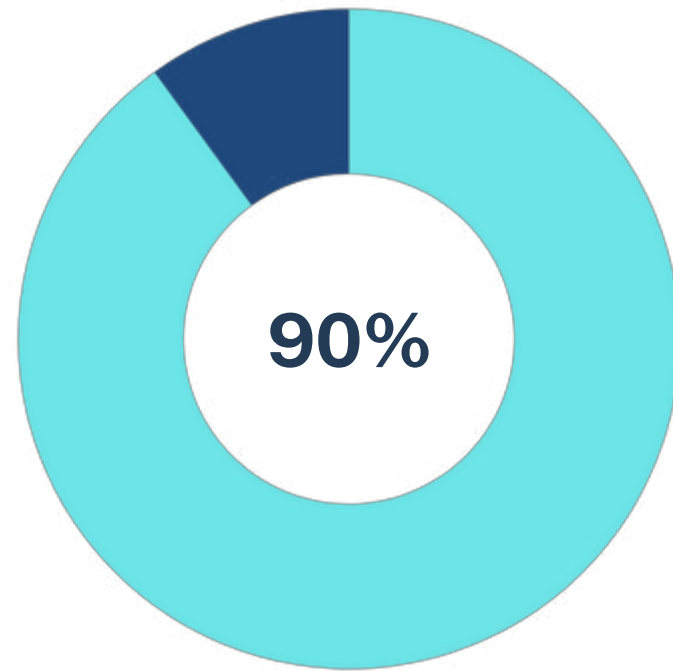


PART 3

SATELLITE SERVICES

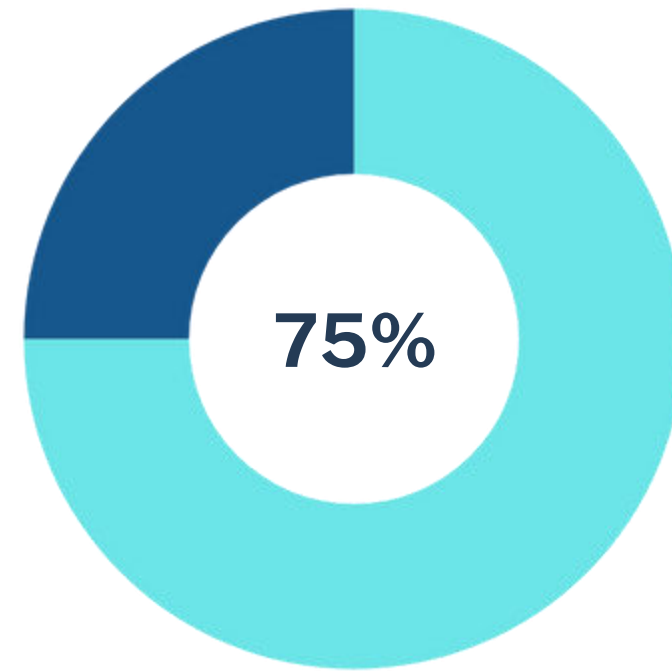


RESPONSE TO SATELLITE SERVICES



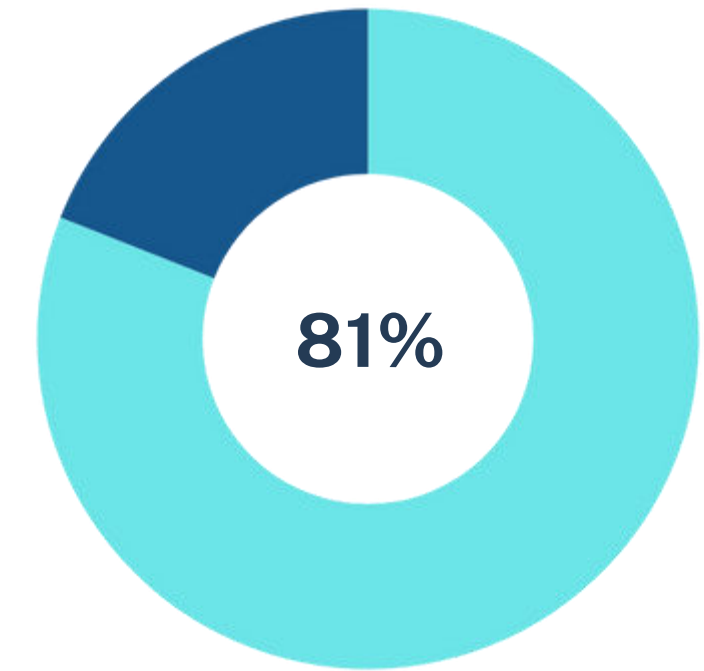
Familiarity

Most respondents had some knowledge of satellite services.



Interest

Three quarters indicated an interest in having satellite services in TCI.

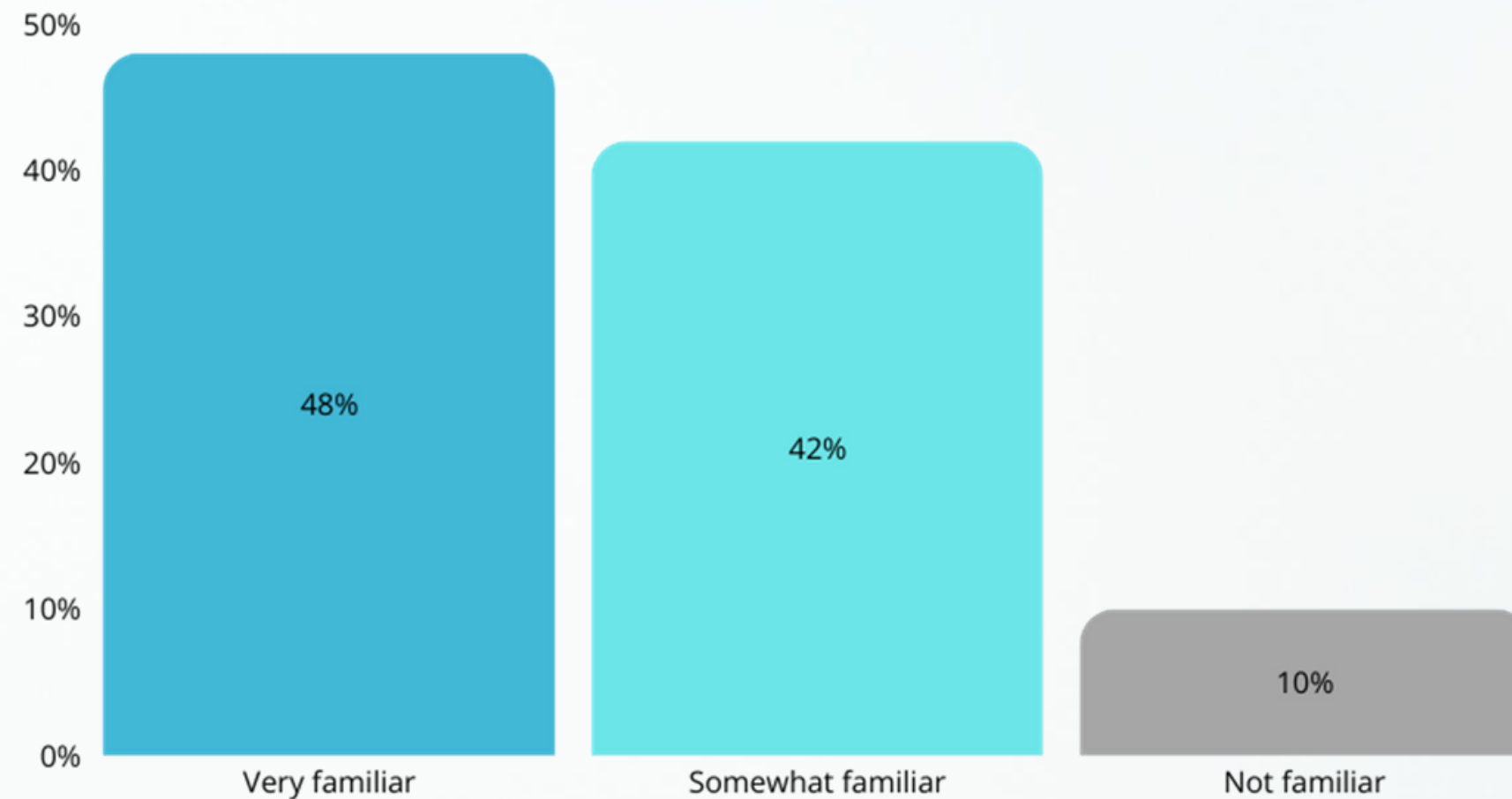


Demand

81% indicated that they would be interested in acquiring internet satellite services.

HOW FAMILIAR ARE YOU WITH SATELLITE SERVICES?

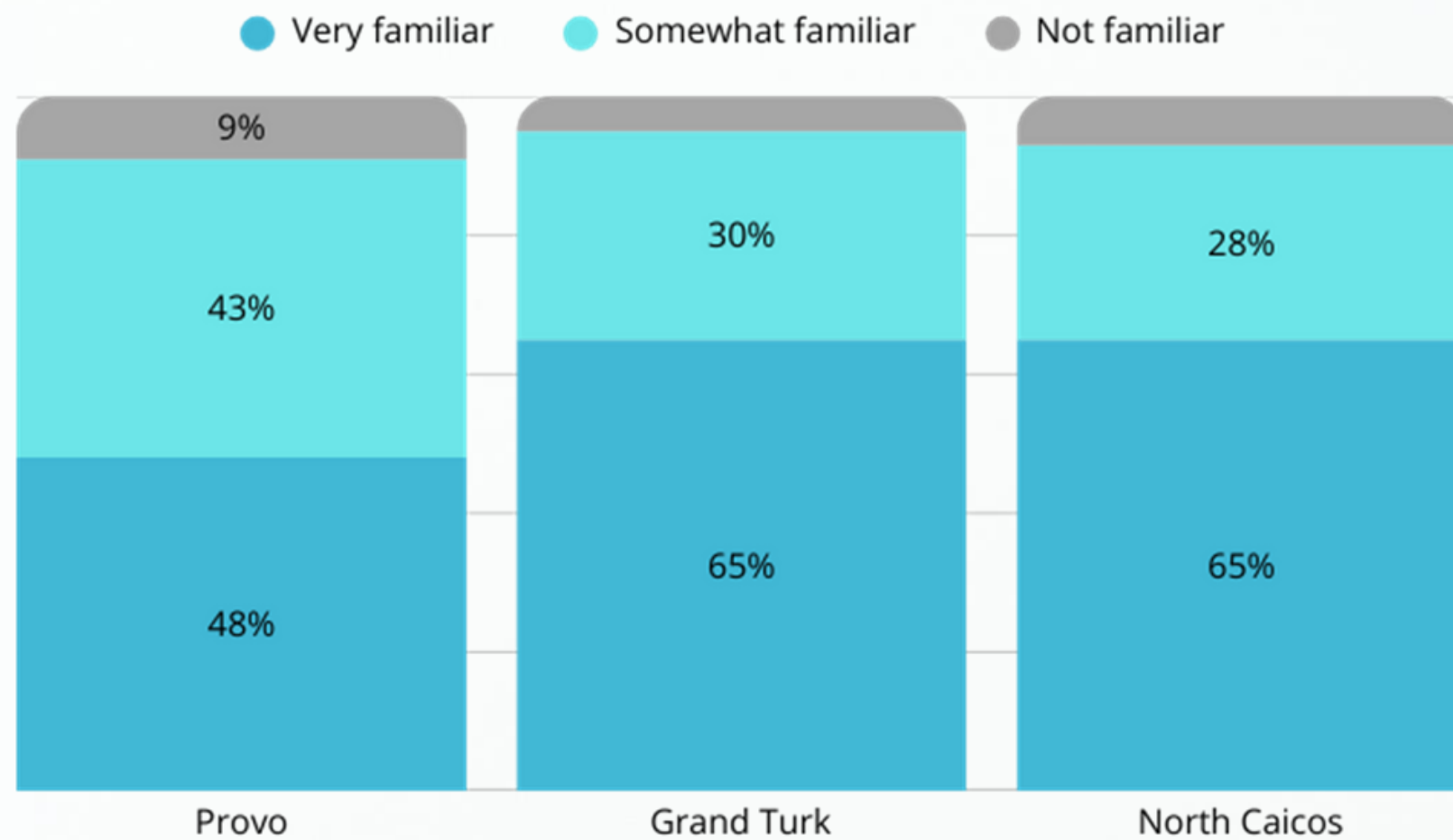
LEVEL OF FAMILIARITY



The majority of respondents were familiar with satellite internet and television services such as Starlink, Hughes Net, Dish Network, and Direct TV, with 48% stating they were very familiar and 42% somewhat familiar.

HOW FAMILIAR ARE YOU WITH SATELLITE SERVICES?

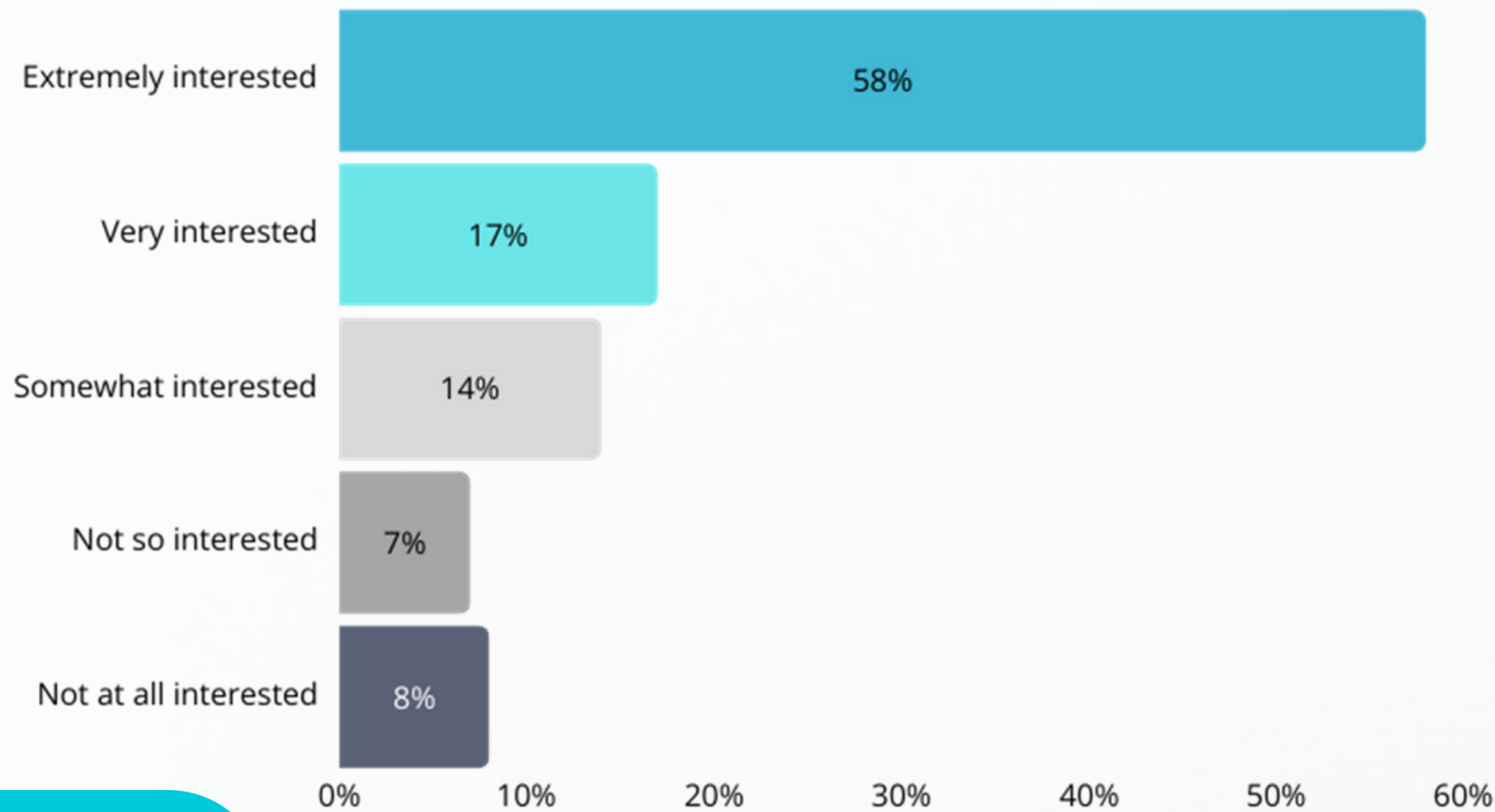
FAMILIARITY BY LOCATION



- Among respondents, 48% of those living in Providenciales and 65% of those residing in Grand Turk and North Caicos reported being very familiar with satellite services.
- Additionally, 43% in Providenciales and 28%–30% in Grand Turk and North Caicos indicated they were somewhat familiar with the services.
- Combined, this shows that 91%–95% of respondents in these locations had some knowledge of satellite services.

ARE YOU INTERESTED IN THESE SERVICES BECOMING AVAILABLE IN TCI?

LEVEL OF INTEREST

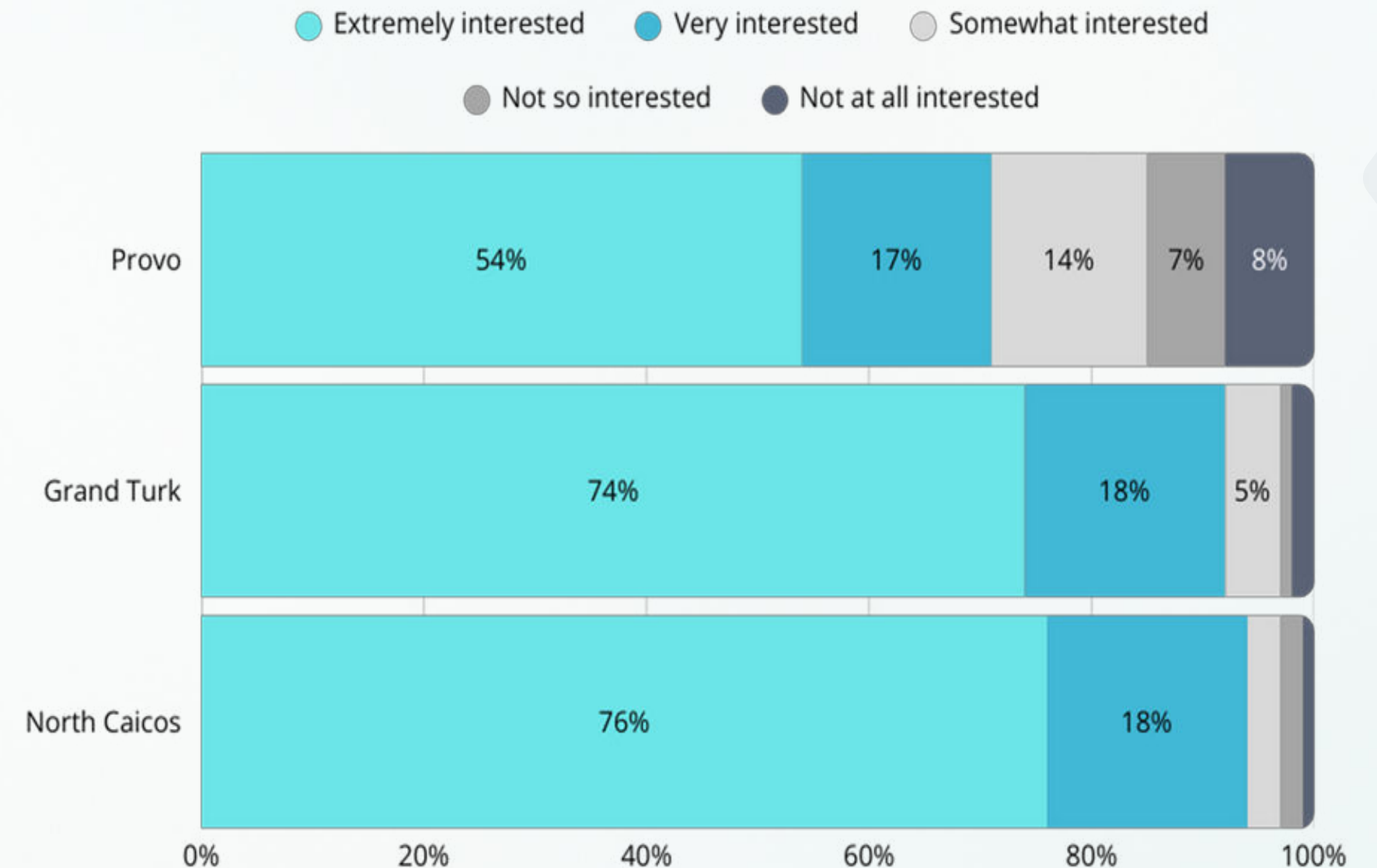


The majority (89%) of respondents expressed interest in having these services available in TCI. Of these, 58% indicated they were extremely interested, 17% very interested, and the remainder somewhat interested.

ARE YOU INTERESTED IN THESE SERVICES BECOMING AVAILABLE IN TCI?

INTEREST BY LOCATION

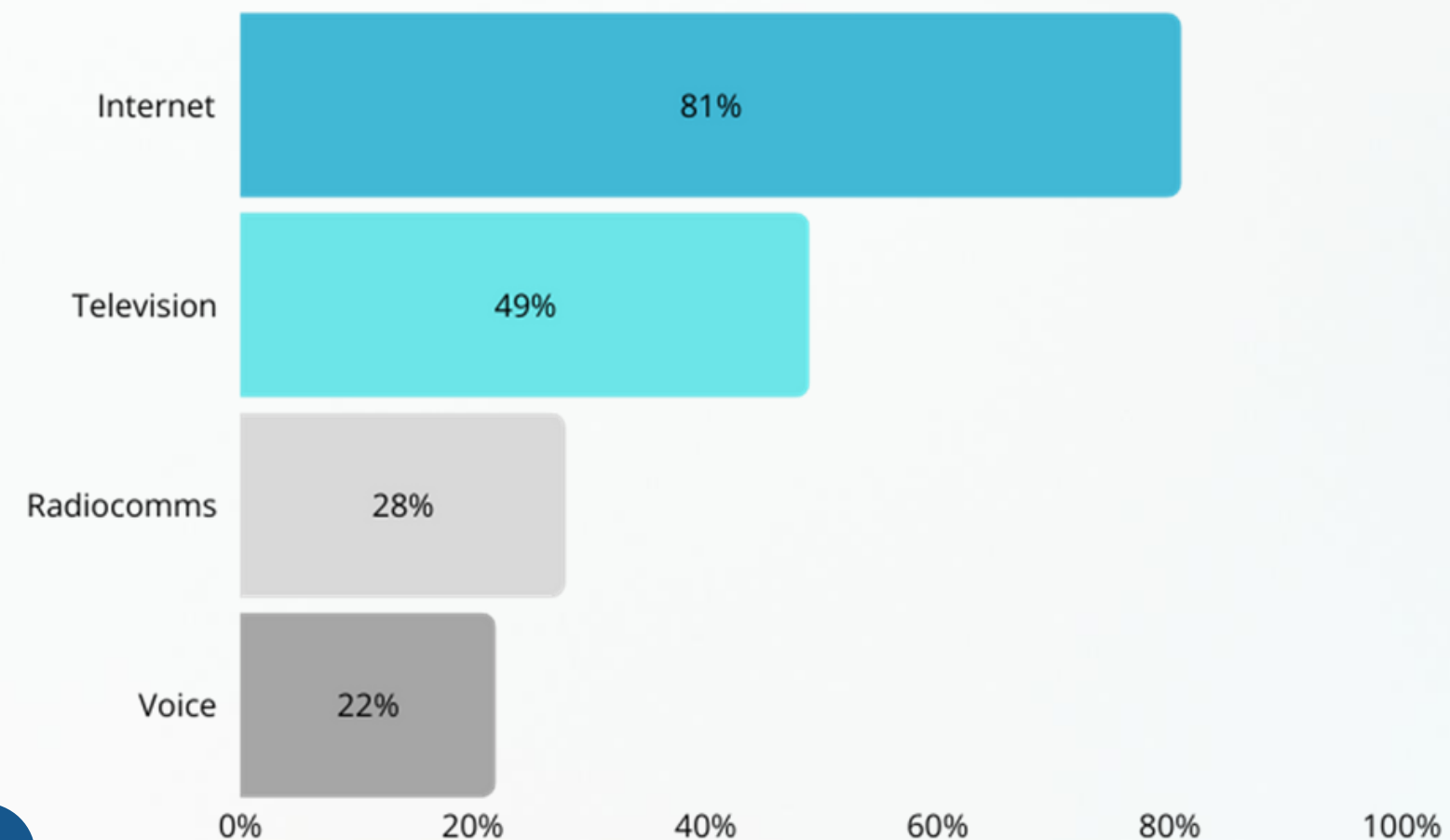
- Examining the top 3 largest population set of respondents, 54% of those living in Providenciales and 74%–76% of those residing in Grand Turk and North Caicos expressed extreme interest in having satellite services available in TCI.
- Additionally, 17%–18% in Providenciales, Grand Turk, and North Caicos indicated they were very interested in these services. Combined, this shows that 71% of respondents in Providenciales and over 90% in Grand Turk and North Caicos demonstrated high levels of interest in these services.



WHAT SPECIFIC SATELLITE SERVICE WOULD YOU BE INTERESTED IN?

DEMAND FOR SATELLITE SERVICES

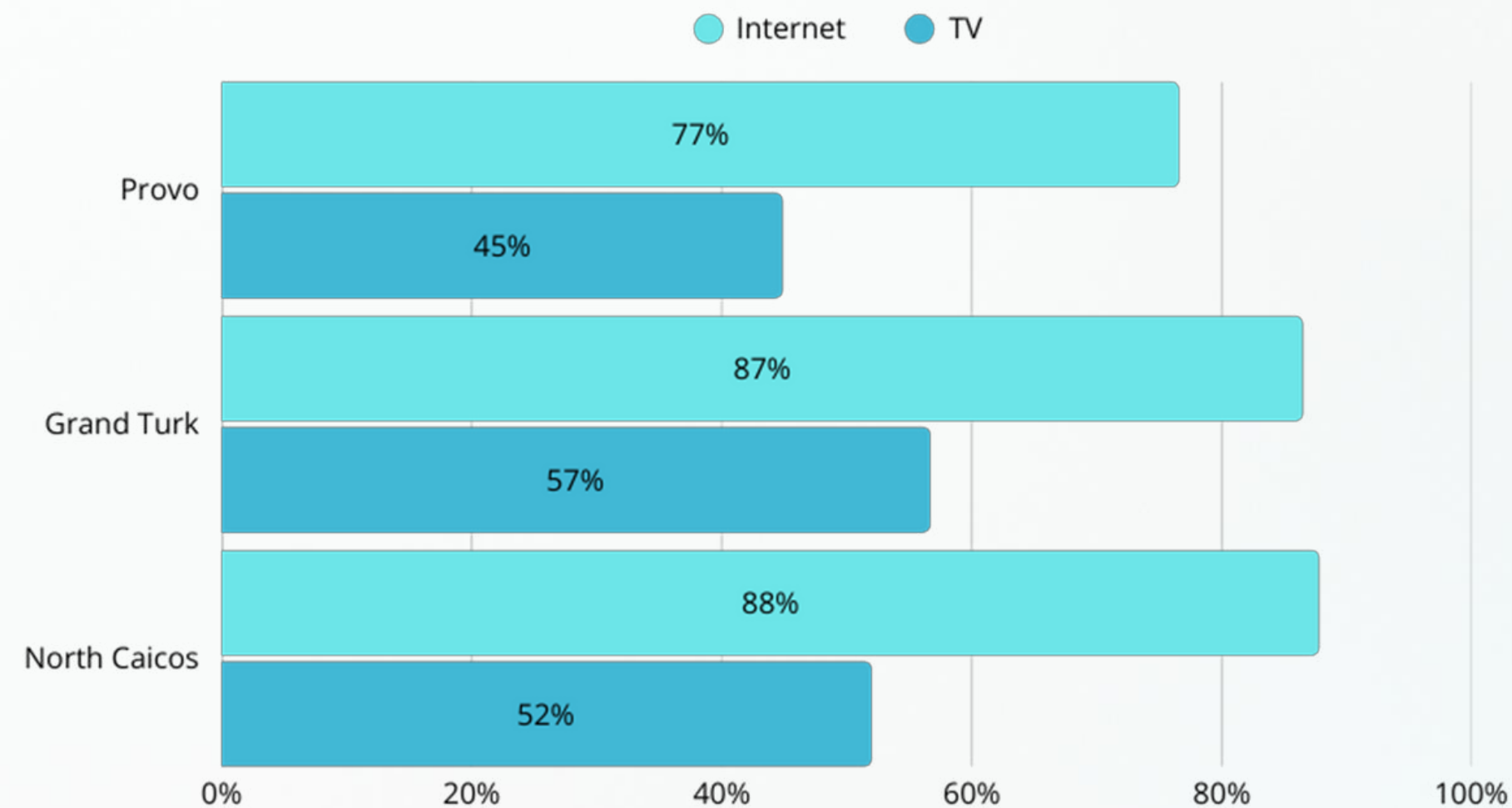
- Respondents were asked to indicate which specific satellite service they would be interested in accessing- internet, television, radio communications, or voice.
- The majority (81%) expressed interest in Internet services, followed by 49% who indicated an interest in accessing television services. As expected, 84% of those interested in accessing satellite internet services currently have internet service. However, half of them (53%) expressed some dissatisfaction.



WHAT SPECIFIC SATELLITE SERVICE WOULD YOU BE INTERESTED IN?

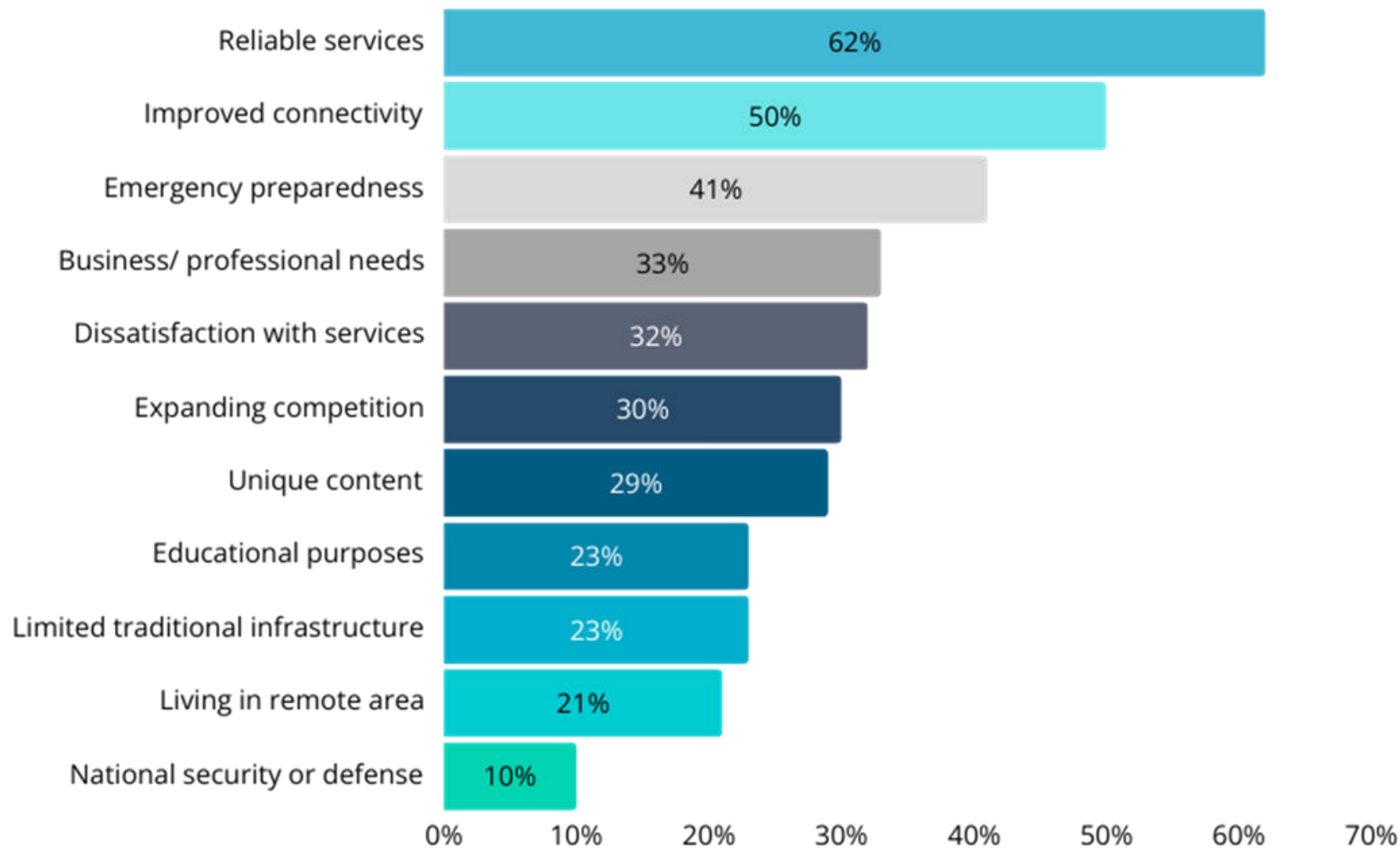
INTERNET & TV DEMAND BY LOCATION

- Among respondents, 77% of those living in Providenciales and 87%–88% of those residing in Grand Turk and North Caicos expressed interest in acquiring satellite internet service.
- Additionally, 45% in Providenciales and 52%–57% in North Caicos and Grand Turk reported that they were interested in acquiring satellite TV service.



WHAT FACTORS INFLUENCE YOUR INTEREST IN SATELLITE SERVICES?

FACTORS DRIVING DEMAND FOR SATELLITE SERVICES



Respondents expressed various motivations for pursuing satellite services. These are grouped into the following categories:

Reliability and Connectivity Concerns

- 62% wanted more reliable services.
- 50% reported having poor connectivity in their current location (primarily in North Caicos, Middle Caicos, and Grand Turk)
- 41% prioritized emergency preparedness, seeking reliable communication during natural disasters.

Professional and Competitive Needs

- 33% required stable and secure connectivity for business or professional purposes.
- 32% explored alternative options due to dissatisfaction with current services.
- 30% supported expanding competition within the telecommunications market.

Content and Educational Access

- 29% were interested in unique content, such as specific TV channels and radio stations.
- 23% cited connectivity needs for educational purposes, including online learning.

Infrastructure and Location Challenges

- 23% faced limited availability of traditional telecommunications infrastructure (e.g., lack of landline or mobile coverage).
- 21% lived in remote areas where reliable connectivity was harder to access. This was particularly true for persons living in Middle Caicos.

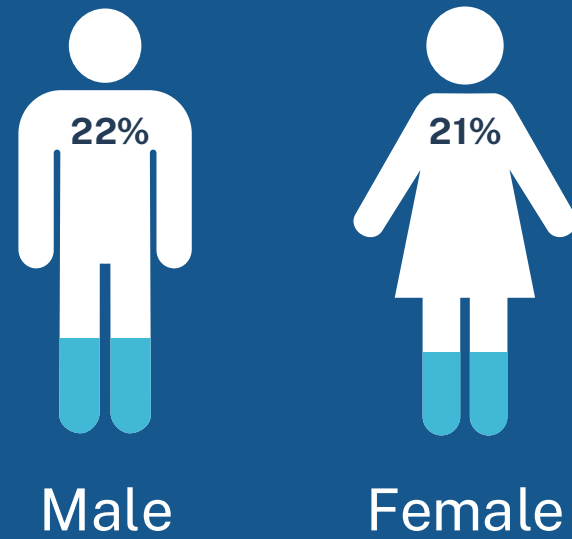
Security Considerations

- 10% viewed national security or defense-related concerns as a reason for seeking improved telecommunications services.

Other unprompted responses refer primarily to affordability and reliable performance and connectivity,

ARE YOU CURRENTLY USING SATELLITE SERVICES?

YES: 22% OF SAMPLE

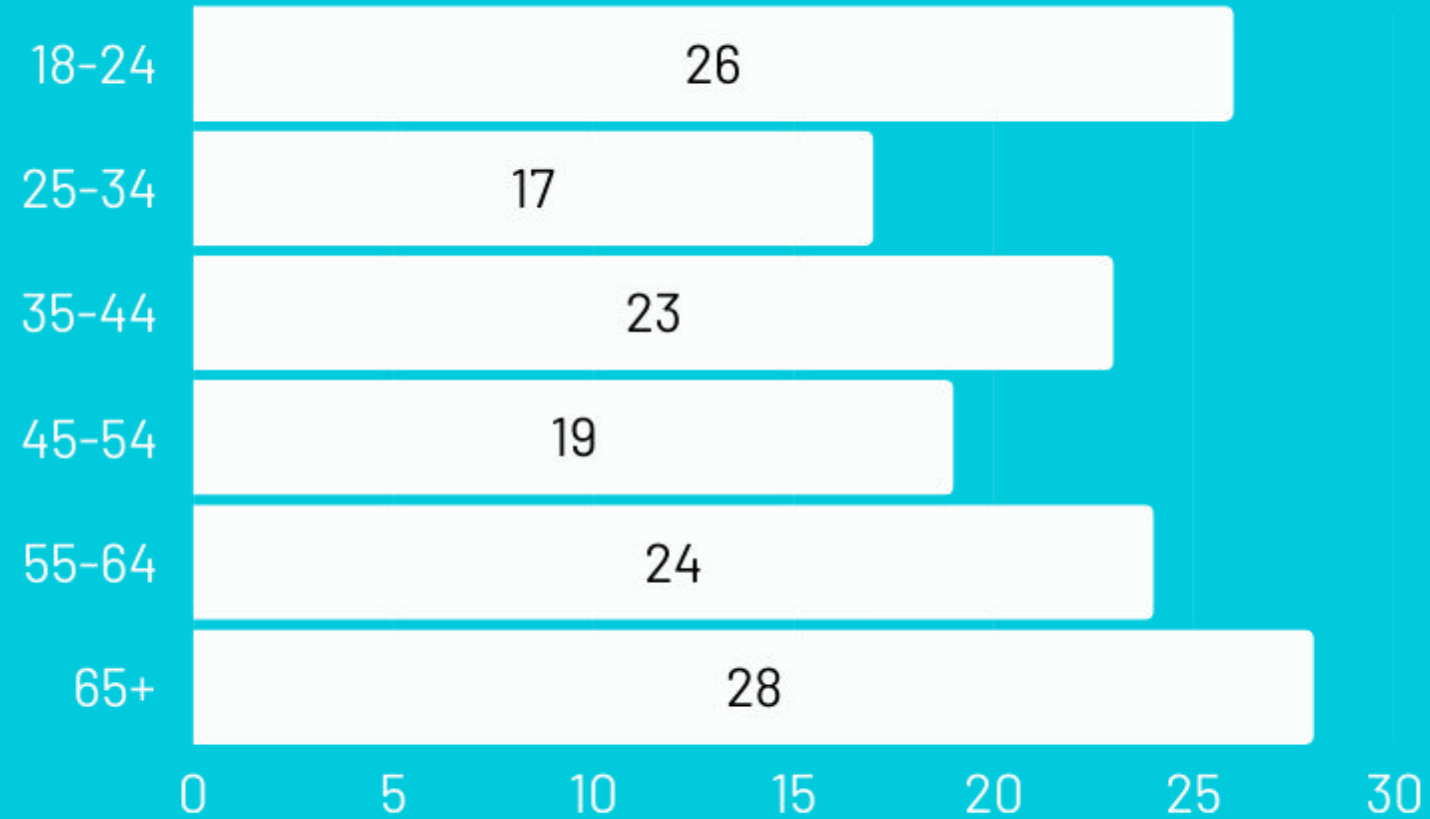


* Percentage of total survey population, inclusive of genders who do not use satellite services

GENDER



LOCATION



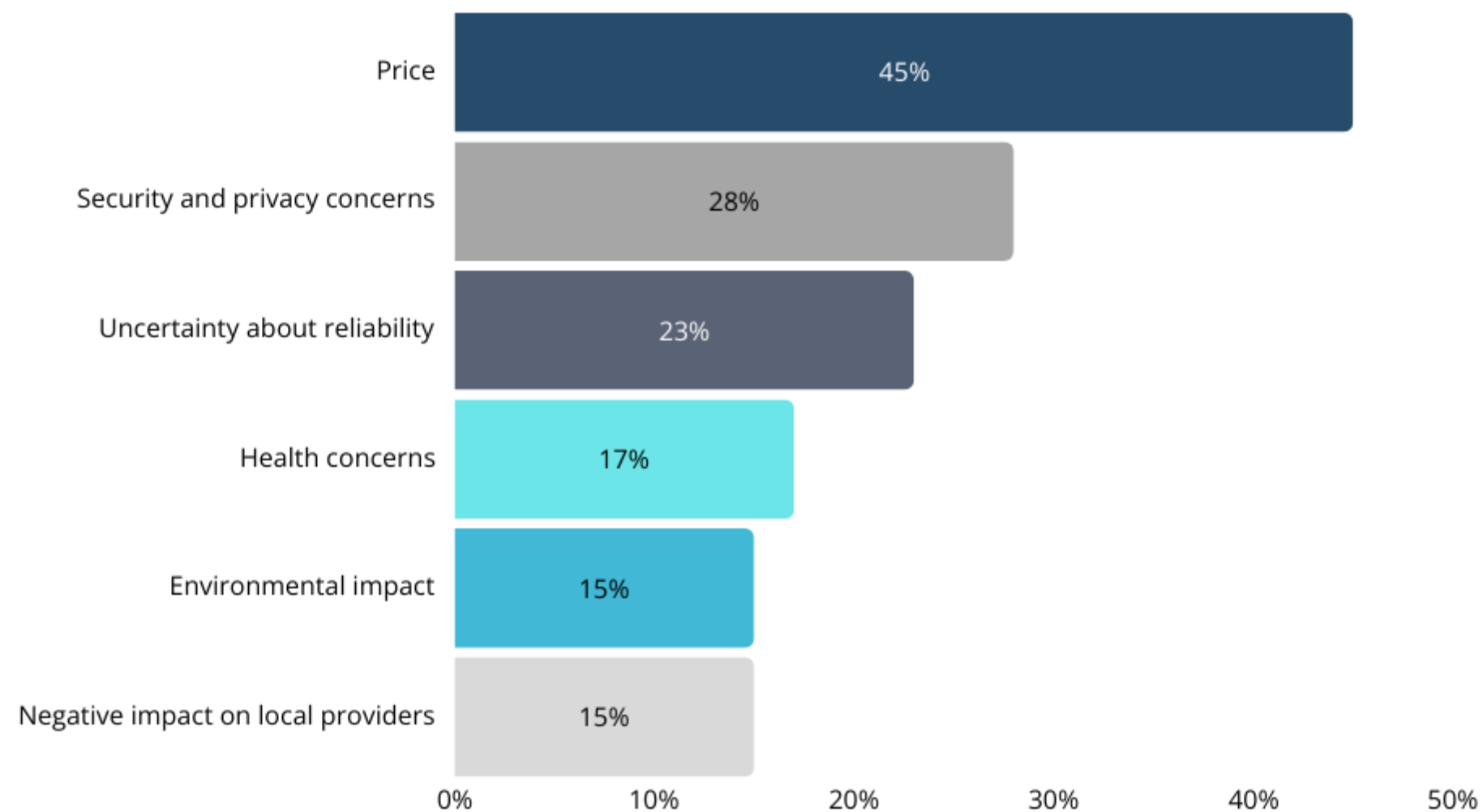
AGE



TYPE OF CUSTOMER

WHAT CONCERNS DO YOU HAVE REGARDING THE USE OF SATELLITE SERVICES?

Concerns regarding Satellite Services



Respondents were prompted to indicate from a specific list of potential challenges, the concerns they would have regarding use of satellite services. Price (45%) emerged as the main concern among respondents, followed by security and privacy (28%).

Additionally, the survey probed other concerns not mentioned in the list. The primary unprompted concerns revolved around Elon Musk (16 persons) and slow speed (1 person).



PART 4

OPEN ENDED FEEDBACK



ANY CONCERNS REGARDING YOUR TELECOM NEEDS AND PREFERENCES?

When asked to share final thoughts on their telecommunication needs and preferences, survey respondents (n=273) provided responses that fell into the following categories:

Demand for Reliable Internet

Comments here stress the inadequacy of current internet services, especially Flow and Digicel, with frequent mentions of poor service.

- "Better internet"
- "RELIABLE Service needed please."
- "Flow and Digicel are TRASH"
- "The current bandwidth is awful Friday-Saturday evening."
- "I need it like today"
- "We just need BETTER telecommunications services desperately"
- "Just better and **faster service**"

Opposition to Starlink/Elon Musk

Individuals express deep distrust toward Elon Musk and oppose his entry into the market.

- "No Starlink please"
- "Don't want Starlink"
- "Elon Musk and his failing companies are a boil on the butt of the civilized world"
- "We don't need Elon Musk, he cannot be trusted"
- "Prefer that nothing to do with Starlink is here"
- "Giving Starlink a license would have a negative impact on local employment"

Pro-Starlink Sentiment

Comments suggest support for Starlink, with users praising its speed, reliability, and utility in remote locations.

- "Please approve Starlink!"
- "Starlink is the best thing we've ever used on North Caicos"
- "Stop holding up the process of allowing Starlink to enter the country"
- "Starlink is efficient and highspeed"
- "I use Starlink at my home in Texas and it's amazing"

Desire for Competition in the Market

Individuals welcome competition and believe lack of competition has resulted in monopolistic behavior.

- "Competition is good"
- "We need more options in the TCI"
- "Digicel and Flow have complete control"
- "Put the consumer first and bring in as many networks as possible"
- "Government needs to balance the need for spectrum fees against the need for competition"

Infrastructure and Access Gaps

Comments highlight how some islands experience bad service, e.g. internet services.

- "Satellite services are urgently needed in the other islands"
- "Being on Middle Caicos offers very limited access to reliable internet"
- "Here in Grand Turk... trying to get consistent fast reliable service is impossible."
- "Want option to access internet services more reliably in remote and marine areas"
- "We need to have the same quality of telecom services on Middle Caicos as Provo"

Business, Remote Work, and Safety Concerns

Comments refer to poor internet hurting businesses and other services.

- "As a business owner my company relies on stable and fast internet"
- "The courts service relies heavily on internet links"
- "Internet services need to support remote work"
- "We will invest by bringing business to TCI when we can have a reliable satellite connection"

Affordability

Comments refer to unjustifiably high costs of current services.

- "Lower price better service. Make it affordable."
- "Current ISP provider charges too much and poor service"
- "Flow and Digicel are expensive and unreliable"
- "I would use Starlink if it was affordable"



PART 5

CONCLUSIONS & CONSIDERATIONS



Conclusions

The survey results paint a clear picture of the current telecom landscape and the sentiment surrounding satellite services in the Turks and Caicos Islands. More than half (54%) of the respondents were male, aged between 35 and 54, with a strong residential customer base centered in Providenciales.

The experiences with existing internet services highlight widespread dissatisfaction, with nearly half expressing frustration over service quality, cost, and connectivity limitations. The sentiment is not limited to one island, but widespread with a higher prevalence in the Caicos Islands and Grand Turk.

Despite these challenges, there is a notable level of awareness and interest in satellite services. Most respondents are familiar with the concept, and an overwhelming majority—nearly nine in ten—expressed interest in having satellite services available in TCI. The primary appeal lies in internet access rather than television, underscoring the growing importance of reliable online connectivity for both personal and professional use. Motivations for adopting satellite services vary, with reliability and connectivity topping the list, followed by business needs, access to content and education, infrastructure limitations, and security concerns.

However, while interest is high, concerns remain. Price emerged as the dominant worry, with nearly half of respondents citing cost as a potential barrier to adoption. Security and privacy issues also surfaced as notable concerns. Unprompted responses revealed additional apprehensions, particularly a strong distrust toward Elon Musk and Starlink, as well as worries about speed and service reliability. These responses suggest that, beyond affordability, the reputation of satellite providers and their business practices play a significant role in shaping consumer attitudes.

Open-ended feedback further emphasized the urgent need for reliable internet options in TCI. Some respondents voiced outright opposition to Starlink, while others supported it and called for greater market competition. The need for better infrastructure, expanded access for businesses and remote workers, and more affordable connectivity options were common themes. The responses reflect a community eager for change, seeking solutions that bridge the gap between demand and accessibility while ensuring fairness, security, and long-term reliability in the telecom sector.

Considerations

- Given the widespread dissatisfaction with current internet services, it's crucial first to consider enhancing service quality and reliability as a way forward, alongside the consideration of the legal adoption of satellite services. This includes addressing connectivity issues, especially in areas like North Caicos, Middle Caicos, South Caicos, and Grand Turk, where poor connectivity is a significant concern. Other considerations in the policy-making should include:
 - **Expanding Infrastructure**
 - Investing in infrastructure to expand coverage and improve service quality in remote and underserved areas. This will help bridge the gap between demand and accessibility, ensuring that all residents have access to reliable telecommunications services.
 - **Introduce Competitive Pricing**
 - Price emerged as a dominant concern among respondents. Introducing competitive pricing strategies and offering affordable packages can help alleviate this concern and distract customers from satellite services.
 - **Enhance Security and Privacy Measures**
 - If satellite service adoption is the way forward, address customer concerns regarding the security and privacy in the use of satellite services such as Starlink. Explore alternative satellite options that champion user privacy and protection.
 - **Market Competition**
 - To drive better performance and pricing from providers, we should encourage greater competition within the telecommunications sector. This includes supporting new entrants while ensuring that existing providers improve their offerings.
- By focusing on these areas, the government of TCI and telecommunications providers can improve customer satisfaction, drive adoption of satellite services, and create a more competitive and reliable market.



PART 6

RESPONDENT INFORMATION





FOLLOW-UP PARTICIPATION

At the end of the survey, respondents were given the option to indicate whether they would be willing to participate in a follow-up study or focus group to explore key themes in greater depth. Those who opted in voluntarily provided their contact information for future engagement.

To maintain confidentiality, this personal information will not be included in the main survey report. Instead, it will be compiled in a separate, secure supplemental document and shared only with authorized parties for the purpose of further consultation and research.

