

# Belmont Cable TV Survey Results

Prepared by  
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## Survey timing:

Survey sent out in electric bills in June of 2002.

Questionnaires received through Tuesday, August 20<sup>th</sup> were included in the statistical analysis.

## Sample totals:

Total number of sequence numbers assigned	2940
Double use numbers assigned a suffix	<u>15</u>
	2955
Blank questionnaires and missing seq. numbers	<u>-32</u>
Total sample	2923
Respondents with cable	2119
Respondents without cable	800
Respondents where cable use not known	<u>3</u>
Total questionnaire responses	2922
Sequence numbers assigned to attached letters	<u>1</u>
Total	2923

## Average bill for subscribers:

Less than \$20	118	5.65%
\$20 to \$45	1374	65.80%
More than \$45	<u>596</u>	<u>28.54%</u>
	2088	100.00%

## Hookups for the 2119 known cable subscribers:

Those reporting box usage	1934	91.3%
Boxes per subscriber reporting box count		1.644
Those reporting direct connects	316	14.9%
Direct connects per DC user		1.55
Those reporting off-the-air TV usage	123	5.8%
OTA usages per reporting OTA user		1.36

## Cable service satisfaction levels:

	<u>No. reporting</u>	<u>low</u>	<u>med</u>	<u>high</u>
a. Overall satisfaction	2044	30.5%	61.0%	8.5%
b. Video quality	2050	26.2%	59.4%	14.5%
c. Sound quality	2053	12.2%	71.4%	16.5%

d. Device reliability	1964	12.7%	64.7%	22.6%
e. Service tech response time	1578	17.9%	66.2%	16.0%
f. Bill clarity	2039	9.8%	69.0%	21.2%
g. Billing accuracy	2013	5.0%	68.2%	26.8%
h. Inquiry/complaint response time	1598	16.0%	68.1%	16.0%
i. Ease of reaching co. by tel.	1741	30.5%	55.9%	13.6%
j. Cust. svc. phone in hours	1581	18.9%	68.6%	12.5%

In the above list, Overall Satisfaction and Ease of Reaching Customer Service had the strongest low ratings, whereas Billing Accuracy had the highest rating.

**Programming balance:**

	<u>No. reporting</u>	<u>too little</u>	<u>just right</u>	<u>too much</u>
a. BCTV ch. 8	1871	14.1%	82.5%	3.4%
b. Public TV	1921	16.0%	83.1%	0.9%
c. Sports	1846	20.6%	70.7%	8.6%
d. News	1893	21.9%	74.6%	3.5%
e. Weather	1897	6.9%	90.6%	2.6%
f. Live government	1860	7.8%	84.6%	7.5%
g. Culture/arts	1847	38.8%	59.8%	1.4%
h. Travel	1784	37.1%	59.6%	3.3%
i. Special interest	1811	29.3%	66.8%	4.0%
j. Health	1746	31.1%	63.7%	5.2%
k. Religious	1711	6.7%	63.8%	29.5%
l. Children's	1648	20.4%	72.9%	6.7%
m. Pay-per-view	1560	16.2%	65.0%	18.8%
n. Home shopping	1735	2.2%	41.6%	56.2%
o. Music videos	1650	10.3%	69.2%	20.5%
p. Comedy	1677	21.1%	72.7%	6.1%
q. Ethnic	1161	19.1%	57.1%	23.8%

Categories with strong Too Little ratings are Culture/Arts (38.8%) and Travel (37.1%), followed by Health (31.1%) and Special Interest (29.3%).

By far the category with the strongest Too Much rating is Home Shopping (56.2%). Others with high Too Much ratings include Religious (29.5%) and Music Videos (20.5%). With a proper system, subscribers should really not be too concerned with channels they don't want, but with the limited capacity of the existing system, an unwanted channel precludes its use for something more attractive.

Adult channels were not listed as a category in the questionnaire, and no written comments concerning them were made.

Of the above, the last entry needs special consideration because of the mix problem. Some felt there was too much of particular ethnicities; others were

concerned that certain ethnicities were left out. Some made written comments about both too much and too little. In retrospect, we should have had separate lines for listing excessive and deficient types.

The number of persons rating ethnic programming as too little was 222. Of these, 118 or 53% noted the specific ethnic groups that were missing or too little broadcast. Counts of specific deficient ethnic groups are as follows (note: some persons listed more than one category):

Italian	19
Afro-American	15
International	13
Armenian	12
Asian	12
Chinese	7
Japanese	7
European	5
Irish	5
Middle Eastern	5
Arabic	4
French	4
Korean	4
Russian	4
German	3
Spanish	3
Indian	2
British	1
Caucasian	1
Eastern European	1
Hungarian	1
Jewish	1
Latino	1
Polish	1
Portuguese	1
South Asian	1

The number of persons rating ethnic programming as too much was 276. Of these, 118 or 43% made specific comments on the type of ethnic programming that was too much. Of the latter, 6 felt there was just too much ethnic/foreign language programming overall. The remaining 112 specifically stated that there was too much Spanish or Latino programming, with many saying that 3 Spanish

speaking channels was much too much for a town like Belmont with a very, very small Latino population. Clearly, one of the problems is that Town residents do not understand the Must Carry laws that force the cable operator to put these channels on the system.

**Wanted channels:**

A total of 1,136 respondents named some channels presently unavailable that they would like. Those channels requested by ten or more persons were, in descending order:

<u>Channel</u>	<u>No.</u>	<u>ATT+</u>
Food Network	256	AE
Animal Planet	127	AE
Fox News	116	AE
Turner Classic Movies	109	DB
Cartoon Network	99	AE
fX	93	AE
Golf Channel	92	DB
ESPN Classics	77	AE
TV Land	65	AE
Independent Film Channel	44	DB
BBC America	42	DB
HBO extra channels	42	DD
Cooking Network	35	
MTV2	31	DV
Game Show Network	27	AE
Health Channel	27	DV
Speed Channel	26	DP
BET	25	AE
More movie channels	24	
Country Music TV	21	AE
Women's Entertainment	19	AB
International Channel	18	DP
Outdoor Life Network	17	DB
Sundance Channel	17	DP
Travel Channel	17	AE
History Channel	15	AE
Oxygen	14	DB
RAI (Radio Italiano)	14	
Home & Garden	13	AE

Showtime extra channels	11	DD
The Movie Channel	11	DD
Cinemax extra channels	10	DD
DIY (Do-it-yourself) Channel	10	

The column on the right lists the availability of these channels on an AT&T Broadband system upgraded in August 2000 (Stow, Mass.). Codes are as follows:

AB	Analog basic
AE	Analog expanded basic service
DB	Digital basic
DP	Digital Premier Pack
DV	Digital Variety Pack
DD	Digital Digital Premium Channels

Of the 33 entries above, 29 were requests for specific channels, 3 were for multiples of three premium channels, and one was a generic request for more movies.

Of the 29 specific channels, one may not exist: the cooking network. A channel by this name is not listed in AT&T Broadband's upgraded offerings nor in Direct TV's offerings. Perhaps persons mentioning this channel meant the Food Network, the most frequently requested channel.

Of the other 28 specifically requested channels, 14, or half, are available on the analog service of AT&T Broadband's upgraded system, 12 require some form of digital service, and 2 (RAI and DIY) are not offered.

Some of the listed channels are already available (History, plus a number of others with fewer than 10 requests). With these, there was often a request for a lower level of service, or in unscrambled form so they could be viewed without a box.

### **Belmont Channel 8:**

#### **Hours per week:**

	<u>Number</u>	<u>Percent</u>
Zero hours (explicit statement)	57	2.8%
Less than 1 hour	1271	62.2%
1 to 3 hours	547	26.8%
3 to 6 hours	101	4.9%
More than 6 hours	<u>68</u>	<u>3.3%</u>
	2044	100.0%

Some of those reporting more than 6 hours per week may have been reporting their total TV viewing hours, since some of these provided no opinions on the quality factors for channel 8.

**Emphasis Rating for Channel 8:**

	<u>Number Responses</u>	<u>Percent Scoring</u>		
		<u>too little</u>	<u>just right</u>	<u>too much</u>
a. Total programming hours	1075	25.5%	70.1%	4.4%
b. Meeting coverage	1274	10.1%	81.0%	8.9%
c. School activities	1178	25.6%	66.6%	7.9%
d. Issue oriented shows	1125	29.0%	64.3%	6.8%
e. Election night coverage	1230	26.2%	69.7%	4.1%
f. Free class availability	959	29.9%	66.8%	3.2%

Fewest complaints of Too Little were for item b., Meeting Coverage, which also had the highest percent for Too Much. For the other categories, ratings were fairly similar.

**Meeting Video and Sound Quality:**

	<u>Number Responses</u>	<u>Percent Scoring</u>		
		<u>low</u>	<u>adequate</u>	<u>high</u>
Video and sound quality	1634	69.0%	29.9%	1.2%

Many persons provided ratings of meeting video and sound quality, and these responses were strongly negative. There were a total of 70 written in comments (not asked for) concerning this issue, with many of these complaining that the audio quality was particularly bad.

**Desired Added High Tech Services:**

Counts of the number of respondents checking off a desired high tech service are as follows:

High speed Internet service	1187
Digital TV	724
Stereo music	365
Local telephone	324

Many of the persons checking off the High Speed Internet Service box put in three or four check marks to stress their strong interest.

**Discounts for Senior Citizens and Disadvantaged Persons:**

Discounts for disadvantaged persons and, especially, senior citizens appears to be a popular idea. Key statistics are as follows:

	<u>respondents</u>	<u>yes</u>	<u>no</u>
Support for senior citizen discount	1965	67.5%	32.5%
Support for disadv. citizen discount	1706	54.5%	45.5%

It's also useful considering how the voting went depending on the ages in the household. (Not all respondents provided age data, and some put an x in the 0–5 box only, thinking such an entry indicated the quantity range of persons in the household, not their ages.)

If we restrict the analysis to responses with valid age data, we find the overall results to be:

	<u>respondents</u>	<u>yes</u>	<u>no</u>
Support for senior citizen discount	1732	66.5%	33.5%
Support for disadv. citizen discount	1526	53.5%	46.5%

Thus, the results for the age valid group are pretty much the same as for the total responding sample.

If we look at households with seniors in them, the results are:

	<u>respondents</u>	<u>yes</u>	<u>no</u>
Support for senior citizen discount	684	80.4%	19.6%
Support for disadv. citizen discount	529	69.0%	31.0%

In households without seniors, the results are:

	<u>respondents</u>	<u>yes</u>	<u>no</u>
Support for senior citizen discount	1048	57.3%	42.7%
Support for disadv. citizen discount	997	45.3%	54.7%

Thus, the support for discounts is stronger in households with seniors than in households without. Nevertheless, even in households without seniors, the majority supports a senior discount. The only discount not supported by a majority is that for disadvantaged citizens among households without seniors.

While there seems to be strong support for discounts, especially senior discounts, the questionnaire did not indicate that there might be a cost in higher rates for others in order to finance such a discount. Considering the large number of households with senior citizens in them (see next section), a senior discount could be quite expensive. A key issue for the Cable Advisory Committee may be

to devise a means for getting citizen feed back on what sort of discount and cost should be supported. Perhaps a set of ballot questions next spring posing various alternatives and costs might be appropriate.

Another issue we might want to consider is who would qualify for a senior discount. Here, there are two parts:

First, there is the question of the qualifying age. Should it be 60, 62, 65, or even 70?

Second, there is the question of how the household should qualify. One way would be to give the discount to a household if there is a senior in it. Here, the discount could serve as a reward, benefiting the household where there is a senior. Another way could be to limit the discount to households containing only one or more seniors. With this approach, the discount would not apply if there were younger persons in the household who could support the full price. In my view, this would be a sounder approach.

### **Age Distributions of Respondents:**

The age distributions of the 1927 responses providing age data are as follows:

<u>Age group</u>	<u>% of households</u>
0-5	10.3%
6-12	13.8%
13-20	15.1%
21-40	36.5%
41-60	46.3%
61 & up	38.9%
0-12	20.1%
0-20	29.8%
61 & up only	28.1%

### **Respondents without Cable:**

There were 800 respondents without cable.

761 reported whether or not they had satellite TV service. Of these:

Have satellite service	13.9%
No satellite service	86.1%

764 reported whether or not they had cable service in the past. Of these:

Had cable service before	39.5%
Never had cable	60.5%

Those who once had cable in the past were asked the reasons why they cancelled the service. 309 provided answers, including 16 who stated that they never had cable service in the past. For these latter respondents, the reasons checked were implied to be reasons for why they never had cable service, instead of why they dropped it. Percentages by reason checked are:

Video quality	18.4%
Programming	33.0%
Customer service	15.5%
Cost	57.3%
Other	79.6%

Of the 79.6% (177) of the respondents who checked "Other," 32.2% (57) of these provided written reasons. These reasons ranged all over the place, from restated complaint of the price being too high, to moving out of town, to having no TV, to frequent complaints about how bad and antiquated Belmont's system is, to other frequent complaints about how bad AT&T Broadband is. Further information on these breakdowns will be provided later.

#### **Age Distribution of Respondents without Cable:**

The age distributions of the 706 responses without cable providing age data are as follows (with the data for respondents with cable copied from the section above and placed along side for comparison purposes):

<u>Age group</u>	<u>% of households without cable</u>	<u>% of households with cable</u>
0-5	10.6%	10.3%
6-12	14.8%	13.8%
13-20	14.8%	15.1%
21-40	29.7%	36.5%
41-60	43.6%	46.3%
61 & up	39.6%	38.9%
0-12	20.9%	20.1%
0-20	29.6%	29.8%
61 & up only	23.0%	28.1%

As can be seen from these figures, the age distribution for households with and without cable are similar, except that the cable group has a heavier representation of the 21 to 40 year old group and of seniors living without younger persons.