

City of Alexandria, Virginia

MEMORANDUM

DATE: DECEMBER 7, 2004
TO: THE HONORABLE MAYOR AND MEMBERS OF CITY COUNCIL
FROM: PHILIP SUNDERLAND, CITY MANAGER *PS*
SUBJECT: 2004 COMCAST CABLE COMMUNICATIONS, INC. ANNUAL
SUBSCRIBER SURVEY REPORT

ISSUE: Receipt of the 2004 Comcast Cable Communications, Inc. (Comcast) Annual Subscriber Survey Report.

RECOMMENDATION: That City Council receive the 2004 Annual Subscriber Survey Report from Comcast. The Commission on Information Technology reviewed the results of the Comcast 2004 Subscriber Survey report at its November 8 meeting, and approved the staff analysis. The Commission monitored the survey interviews during its July 10 meeting.

DISCUSSION: Section 9-3-1532 (b) of the City Code requires the cable television franchisee to conduct an annual cable subscriber survey for the purpose of evaluating the degree of subscriber satisfaction with Comcast's cable television service and identifying whether the cable-related needs and interests of the community are being met. The 2004 cable subscriber survey was administered via telephone to 803 Alexandria City cable subscribers, compared to 811 in 2003. The survey was conducted by Q7 Broadband Market Research, a provider of marketing and teleservices based in Northern Virginia.

This year's survey showed that subscribers continue to have a high level of satisfaction with the quality of service offered by Comcast. Highlights of the 2004 survey findings follow.

Survey Sampling Procedure

Q7 Broadband Market Research's staff interviewed 803 cable television subscribers from July 12, 2004 to July 25, 2004. The respondents were randomly selected from the Comcast billing database of 49,893 Alexandria cable customers. The report indicates that the margin of error in the survey is plus or minus 3.44 percent, which means that the survey instrument and the methodology used to conduct the survey can be relied on to produce responses that are accurate at least 95 percent of the time.

Cable Subscriber Survey Results

Overall subscriber awareness of the availability of community (Channel 69), governmental (Channel 70), and educational (Channels 71, 72 and 73) channels decreased from 65 percent (525 of 811) in 2003 to 38 percent (308 of 803) in 2004. Staff believes that this decrease is related to the large number of new residents in the City.

28 percent (86 of 308) of the respondents who said they were aware of these channels reported watching Channel 69/Comcast Cable TV (Alexandria Community Channel), a decrease from last year's 52.2 percent (105 of 201). Respondents who indicated that they watched Channel 69 programming expressed interest in the following:

- Local High School Sports - 25 percent (76 of 308); up slightly from 23.4 percent (47 of 201) in 2003.
- Civic Informational Shows - 75 percent (229 of 308); up significantly from 34.5 percent (69 of 201) in 2003.
- Entertainment Shows - 31 percent (95 of 308); down from 41.9 percent (84 of 201) in 2003.
- Local Current Events - 52 percent (159 of 308); up from 43.2 percent (87 of 201) in 2003.

With respect to Channel 70 Government Access Programming, 38.4 percent (308 of 803) of the total respondents in the survey) indicated they were aware of this channel. Of the 308, 51.3 percent (158) of the respondents indicated that they watched Channel 70 programming, up from 45 percent (232 of 525) in 2003. Of those who watched government programming:

- 79.7 percent (126 of 158) had watched a City Council meeting, the same percentage when compared with 184 of 232 in 2003;
- 48.7 percent (77 of 158) watched a Saturday City Council public hearing, up from 43.5 percent (101 of 232) in 2003;
- 62 percent (98 of 158) watched a Planning Commission meeting, up from 53.4 percent (124 of 232) in 2003;
- 51.9 percent (81 of 158) watched a Board of Zoning Appeals meeting, up from 49.6 percent (115 of 232) in 2003;
- 46.8 percent (74 of 158) watched a Board of Architectural Review - Old and Historic District meeting, up from 37.9 percent (88 of 232) in 2003;
- 41.1 percent (65 of 158) watched a Board of Architectural Review - Parker-Gray District meeting, up from 26.7 percent (62 of 232) in 2003;

- 58.9 percent (93 of 158) watched an Alexandria School Board meeting. Please note that only 13.4 percent of the total survey respondents reported having children enrolled in the Alexandria public school system (108 of 803). Last year, 50.4 percent (117 of 232) had watched a School Board meeting with 16.3 percent having children enrolled in the Alexandria public school system.

When polled, subscriber interest in programming that highlights City services, programs and/or projects, was 18.8 percent (151 of 803) in 2004, down from 22.1 percent (179 of 811) in 2003.

Of the 388 subscribers who handled their cable TV problems via telephone, 85.3 percent (331 of 388) reported that Comcast's customer service personnel response was timely, which is up from 80 percent in 2003, and courteous (93.3 percent or 362 of 388, which is up slightly from 92 percent in 2003). Subscriber problems were resolved and/or questions answered by Comcast staff in 71.9 percent of the cases (279 of 388 respondents), which is down slightly from 82 percent of the respondents in 2003.

Fewer respondents visited Comcast's Van Dorn Street office in 2004, 35.9 percent (288 of 803) compared to 60 percent (490 of 811) in 2003. According to Ms. Schuler, the primary reason for visiting the facility remains bill payment.

Subscriber satisfaction levels with regard to the cable system itself remain high, although slightly less/more than that in 2003. Using a scale from 1 to 5, with 1 meaning "extremely dissatisfied" and 5 meaning "extremely satisfied," the majority of the respondents were generally satisfied with all of the following:

- Installation of cable in their home - 4.3, up slightly from 2003's result of 4.0.
- Picture quality - 4.4, up from 2003's result of 3.9
- Sound quality - 4.4 up slightly from 2003's result of 4.0
- Response to inquiries - 4.3, up from 3.7 in 2003
- Number of channels - 4.4, up slightly from 2003's 4.0
- Overall customer satisfaction - 4.4, which is up from 2003's result of 3.9

To determine the accessibility of Comcast and its equipment for subscribers with disabilities, three questions were posed to survey respondents. 4.7 percent (38 of 803) reported a person in the household having a hearing or vision disability, which is down from 6.8 percent (55 of 811) over last year. Of those 38 respondents, 7.9 percent (three of 38) reported a mobile, manual or dexterity impairment; 44.7 percent (17 of 38) indicated problems in their ability to access and/or change channels, and 13.2 percent (five of 38) reported problems in their ability to discuss bills with Comcast. Eight of the 38 respondents (21 percent) indicated that their ability to find a listing of cable programming was impaired. It should be noted that Comcast is equipped with a telecommunications device for the deaf (TTY) and has channel and program guides in Braille and large print for the visually impaired. Staff continually works with Comcast to address other issues affecting the accessibility of Comcast and its equipment for disabled subscribers.

FISCAL IMPACT: None

ATTACHMENT: Comcast Cable Communications 2004 Annual Cable Television Subscriber
Survey Report and Survey Form

STAFF:

Rose Williams Boyd, Director of Citizen Assistance

Jacqueline Levy, Cable Television Administrator



Comcast ALEXANDRIA Customer Surveys

803 Total Surveys

SECTION ONE - BACKGROUND INFORMATION

1). What is the major reason you subscribe to cable television at this time?

53.3%	428	1 MORE CHANNELS
19.2%	154	2 MOVIES
40.0%	321	3 BETTER RECEPTION
7.1%	57	4 PREMIUM SERVICES
8.8%	71	5 SPORTS
10.5%	84	6 OTHER
	1115	Total Responses

SECTION TWO - ACCESS CHANNELS

SECTION TWO - ACCESS CHANNELS

1). Were you previously aware of these channels?

38.4%	308	1 YES
61.6%	495	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION TWO - ACCESS CHANNELS

Channel 70 is the local government access channel which provides brief announcements about upcoming government meetings and events, and broadcasts live City Council meetings, Planning Commission meetings, Board of Zoning Appeals meetings, and Board of Architectural Review meetings. Do you

2). watch Channel 70 programming?

51.3%	158	1 YES
48.7%	150	2 NO
0.0%	0	0 DK/NA/OA
	308	Total Responses



SECTION TWO - ACCESS CHANNELS

2a). Have you ever watched an Alexandria City Council meeting?

79.7%	126	1 YES
20.3%	32	2 NO
0.0%	0	0 DK/NA/OA
100.0%	158	Total Responses

SECTION TWO - ACCESS CHANNELS

2b). Have you ever watched a Saturday public hearing?

48.7%	77	1 YES
51.3%	81	2 NO
0.0%	0	0 DK/NA/OA
158		Total Responses

SECTION TWO - ACCESS CHANNELS

2c). Have you ever watched a Planning Commission meeting?

62.0%	98	1 YES
38.0%	60	2 NO
0.0%	0	0 DK/NA/OA
158		Total Responses

SECTION TWO - ACCESS CHANNELS

2d). Have you ever watched a Board of Zoning Appeals meeting?

51.9%	81	1 YES
48.1%	75	2 NO
0.0%	0	0 DK/NA/OA
156		Total Responses



SECTION TWO - ACCESS CHANNELS

2e). Have you ever watched a Board of Architectural Review - Old and Historic District meeting?

46.8%	74	1 YES
53.2%	84	2 NO
0.0%	0	0 DK/NA/OA
	158	Total Responses

SECTION TWO - ACCESS CHANNELS

2f). Have you ever watched a Board of Architectural Review - Parker-Gray District meeting?

41.1%	65	1 YES
58.9%	93	2 NO
0.0%	0	0 DK/NA/OA
	158	Total Responses

SECTION TWO - ACCESS CHANNELS

2g). Have you ever watched a School Board meeting?

58.9%	93	1 YES
41.1%	65	2 NO
0.0%	0	0 DK/NA/OA
	158	Total Responses

SECTION TWO - ACCESS CHANNELS

3). Would you be interested in specific programming which highlights City services, programs and/or projects?

18.8%	151	1 YES
81.2%	652	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses



SECTION TWO - ACCESS CHANNELS

- Channels 71, 72, and 73 are the educational access channels. Channel 72 broadcasts telecourses from Northern Virginia Community College. Channel 73 broadcasts telecourses from George Mason University and Channel 71 for cable ready TVs is used by the Alexandria City Public School system.
- 4).

- 4a). Have you ever watched the telecourses sponsored by Northern Virginia Community College?

11.8%	95	1 YES
88.2%	708	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION TWO - ACCESS CHANNELS

- 4b). Have you ever watched the telecourses sponsored by George Mason University?

13.0%	104	1 YES
87.0%	699	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION TWO - ACCESS CHANNELS

- 4c). Have you ever watched any of the programming sponsored by the Alexandria City Public Schools?

13.8%	111	1 YES
86.2%	692	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses



SECTION TWO - ACCESS CHANNELS

4d). Do you presently have children enrolled in the Alexandria Public School System?

13.4%	108	1 YES
86.6%	695	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION TWO - ACCESS CHANNELS

4e). Instructional programming can also be seen on MHZ2/Channel 25. Have you ever watched instructional programming sponsored by MHZ2/Channel 25?

11.7%	94	1 YES
88.3%	709	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69

Comcast produces local programming as a public service to Alexandrians. These programs are shown on Channel 69 in the evenings during the week and on the weekends.

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69

1). Have you ever watched the programming on Channel 69?

27.6%	222	1 YES
72.4%	581	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses



SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69

2). Have you ever watched the Community Bulletin Board on Channel 69 from 10:00 am to 5:30 am daily?

51.8%	115	1 YES
48.2%	107	2 NO
0.0%	0	0 DK/NA/OA
	222	Total Responses

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69

3). Are you interested in any of the following categories of programming that are currently shown on Channel 69?

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69 - INTEREST

3a). Local high school sports?

25.2%	202	1 YES
74.8%	601	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69 - INTEREST

3b). Civic/Informational Shows?

74.8%	601	1 YES
25.2%	202	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69 - INTEREST

3c). Entertainment Shows?

30.9%	248	1 YES
69.1%	555	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses



SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69 - INTEREST

3d). Current Local Events?

51.8%	416	1 YES
48.2%	387	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69

3aa). What are the biggest obstacles to your watching more programs on the PEG channels?

26.91%	293	1 TECHNICAL QUALITY OF PROGRAMS
26.72%	291	2 LACK OF INTEREST IN TOPICS
30.30%	330	3 LACK OF PROGRAM LISTING INFO
16.07%	175	4 OTHER
	1089	Total Responses

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69

3bb). Have you ever considered producing a show on the Community Channel?

8.8%	71	1 YES
91.2%	732	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69

3cc). Are you aware that Comcast conducts Community Programming Volunteer Operations classes in television production for a nominal fee?

18.1%	145	1 YES
81.9%	658	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses



SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69

3dd). Would you be interested in taking such a class?

31.8%	255	1 YES
68.2%	548	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION FOUR - SERVICE TO SUBSCRIBERS

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Have you ever called the cable company for any reason other than initiating service?

1).

48.3%	388	1 YES
51.7%	415	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION FOUR - SERVICE TO SUBSCRIBERS

1a). Was your call answered within a reasonable period of time?

85.3%	331	1 YES
14.7%	57	2 NO
0.0%	0	0 DK/NA/OA
	388	Total Responses

SECTION FOUR - SERVICE TO SUBSCRIBERS

1b). Was the person with whom you spoke courteous?

93.3%	362	1 YES
6.7%	26	2 NO
0.0%	0	0 DK/NA/OA
	388	Total Responses



SECTION FOUR - SERVICE TO SUBSCRIBERS

1c). Was your question or problem resolved?

71.9%	279	1 YES
28.1%	109	2 NO
0.0%	0	0 DK/NA/OA
	388	Total Responses

SECTION FOUR - SERVICE TO SUBSCRIBERS

1d). Have you ever visited the local Comcast Office?

35.9%	288	1 YES
64.1%	515	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION FOUR - SERVICE TO SUBSCRIBERS

1e). Were you satisfied with the quality of service you received?

89.7%	720	1 YES
10.3%	83	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION FOUR - SERVICE TO SUBSCRIBERS

Using a scale from 1 to 5, with 1 meaning "extremely dissatisfied" and 5 meaning "extremely satisfied," please select the number that best represents your satisfaction with the following customer service aspects of the system.

2).

4.342	1Ca	a).	INSTALLATION OF CABLE IN YOUR HOME
4.361	1Cb	b).	PICTURE QUALITY
4.354	1Da	c).	SOUND QUALITY
4.257	1Db	d).	RESPONSE TO INQUIRIES OR PROBLEMS
4.354	1Ea	e).	NUMBER OF CHANNELS PROVIDED
4.349	1Eb	f).	OVERALL CUSTOMER SERVICE



SECTION FIVE - PROGRAMMING SURVEY

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- 1a). Are there any channels that are not presently offered that you or others in your household would like to see added to our system?

22.5%	181	1 YES
77.5%	622	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses

SECTION FIVE - PROGRAMMING SURVEY

- 1b). If yes, which channel(s) would you like to see added to the system?
PLEASE SEE DATA SHEET

SECTION FIVE - PROGRAMMING SURVEY

- 1c). If Comcast added the new channels that you would like to see, would you be willing to pay more for the service?

30.9%	56	1 YES
69.1%	125	2 NO
0.0%	0	0 DK/NA/OA
	181	Total Responses

SECTION SIX - ACCESSIBILITY SURVEY

SECTION SIX - ACCESSIBILITY SURVEY

- 1). Are there any persons in your household with hearing or vision disabilities which interferes with their enjoyment of cable TV?

4.7%	38	1 YES
95.3%	765	2 NO
0.0%	0	0 DK/NA/OA
	803	Total Responses



SECTION SIX - ACCESSIBILITY SURVEY

2). Are there any persons in your household with mobile, manual or dexterity impairments that would interfere with their ability to use cable TV controls?

7.9%	3	1 YES
92.1%	35	2 NO
0.0%	0	0 DK/NA/OA
	38	Total Responses

SECTION SIX - ACCESSIBILITY SURVEY

3). Have any of these disabilities or impairments affected this person's ability to:

SECTION SIX - ACCESSIBILITY SURVEY

3a). Access/change channels on cable?

44.7%	17	1 YES
55.3%	21	2 NO
0.0%	0	0 DK/NA/OA
	38	Total Responses

SECTION SIX - ACCESSIBILITY SURVEY

3b). Discuss a bill with Comcast?

13.2%	5	1 YES
86.8%	33	2 NO
0.0%	0	0 DK/NA/OA
	38	Total Responses

SECTION SIX - ACCESSIBILITY SURVEY

3c). Find out what programming is on cable?

21.1%	8	1 YES
78.9%	30	2 NO
0.0%	0	0 DK/NA/OA
	38	Total Responses

15



SECTION SIX - ACCESSIBILITY SURVEY

3d). Understand the dialog on programs?

18.4%	7	1 YES
81.6%	31	2 NO
0.0%	0	0 DK/NA/OA
	38	Total Responses

SECTION SIX - ACCESSIBILITY SURVEY

3e). Follow the program on cable?

7.9%	3	1 YES
92.1%	35	2 NO
0.0%	0	0 DK/NA/OA
	38	Total Responses

SECTION FOUR - SERVICE TO SUBSCRIBERS

1e). Were you satisfied with the quality of service you received?

****PARSED TO THE 288 ACTUAL VISITORS IN Sec 4 1D.

92.9%	265	1 YES
7.1%	23	2 NO
0.0%	0	0 DK/NA/OA
	288	Total Responses