

City of Alexandria, Virginia

MEMORANDUM

DATE: DECEMBER 1, 2003

TO: THE HONORABLE MAYOR AND MEMBERS OF CITY COUNCIL

FROM: PHILIP SUNDERLAND, CITY MANAGER *ps*

SUBJECT: 2003 COMCAST CABLE COMMUNICATIONS, INC. ANNUAL
SUBSCRIBER SURVEY REPORT

ISSUE: Receipt of the 2003 Comcast Cable Communications, Inc. (Comcast) Annual Subscriber Survey Report (Attachment 1).

RECOMMENDATION: That City Council receive the 2003 Annual Subscriber Survey Report from Comcast. The Commission on Information Technology, at its November 24 meeting, reviewed the results of the Comcast 2002 Subscriber Survey report and approved the report and staff analysis. The Commission monitored the survey interviews during its July 14 meeting.

DISCUSSION: Section 9-3-153 (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 2003 cable subscriber survey was administered via telephone to 811 Alexandria cable subscribers, compared to 802 in 2002. The survey was conducted by Q7 Broadband Market Research Inc., 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. The number of cable subscribers who reported watching government programming on City government Channel 70 decreased from 263 in 2002 to 232 in 2003. Highlights of the 2003 survey findings follow.

Survey Sampling Procedure

Q7 Broadband Market Research's staff interviewed 811 cable television subscribers from July 8 through August 2. The respondents were randomly selected from the Comcast billing database of approximately 51,247 Alexandria cable customers. Marie Schuler, Director of Government and Community Affairs for Comcast, indicated that the margin of error in the survey is plus or minus five 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 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 81 percent in 2002 to 65 percent in 2003. Staff believes that this decrease is related to the large number of new residents in the City.
- 52.2 percent (105 of 201) of the respondents who said they were aware of these channels reported watching Channel 69/Comcast Cable TV (Alexandria Community Channel), an increase from last year's 48 percent (373 of 802). Respondents who indicated that they watched Channel 69 programming expressed general interest in the following:
 - ▶ Local High School Sports – 23.4 percent (190 of 811) up from 21 percent (167 of 783) in 2002;
 - ▶ Civic/Informational Shows – 34.5 percent (280 of 811) down from 42 percent (332 of 783) in 2002;
 - ▶ Entertainment Shows – 41.9 percent (340 of 811) down from 52 percent (404 of 783) in 2002;
 - ▶ Local Current Events – 43.2 percent (350 of 811) down from 61 percent (480 of 783) in 2002.
- With respect to Channel 70/Government Access Programming, 65 percent (525 of the 811 total respondents in the survey) indicated they were aware of this channel. 45 percent (232 of 525) of respondents indicated that they watched Channel 70 programming, down from 49 percent (263 of 536) in 2002. Of the 525 who were aware of Channel 70 programming, 232 respondents indicated the following:
 - ▶ 79 percent (184 of 232) had watched a City Council meeting, a 37 percent increase compared with 198 of 536 in 2002;
 - ▶ 43.5 percent (101 of 232) watched a Saturday City Council public hearing, up from 17 percent (90 of 536) in 2002;
 - ▶ 53.4 percent (124 of 232) watched a Planning Commission meeting, up from 14 percent (113 of 536) in 2002;
 - ▶ 49.6 percent (115 of 232) watched a Board of Zoning Appeals meeting, up from 13 percent (101 of 536) in 2002;

- ▶ 37.9 percent (88 of 232) watched a Board of Architectural Review - Old and Historic District meeting, up from 11 percent (91 of 536) in 2002;
 - ▶ 26.7 percent (62 of 232) watched a Board of Architectural Review - Parker- Gray District meeting, up from 10 percent (79 of 536) in 2002;
 - ▶ 50.4 percent (117 of 232) watched an Alexandria School Board meeting with 16.3 percent (132 of 536) of these respondents having children enrolled in the Alexandria public school system compared to last year when 14 percent (130 of 536) had watched a School Board meeting with 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 22.1 percent (179 of 811) in 2003 down from 31 percent (242 of 783) in 2002.
- Of the 438 subscribers who handled their cable TV problems via telephone, the majority reported that Comcast's customer service personnel response was timely (80 percent or 349 of 438, which is down slightly from 81 percent in 2002) and courteous (92 percent or 372 of 410, which is up slightly from 91 percent in 2002). Subscriber problems were resolved and/or questions answered by Comcast staff in 82 percent of the cases (358 of 438 respondents), which is up from 79 percent of the respondents in 2002.
- More respondents visited Comcast's Van Dorn Street office in 2003, 60 percent (490 of 811) compared to 47 percent in 2001. According to Ms. Schuler, the primary reason for visiting the facility remains bill payment.
- Subscriber satisfaction levels with regard to the cable system remain high, although slightly less than that in 2002. 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 - 4.0, down slightly from 2002's result of 4.1
 - Picture quality - 3.98, down from 2002's result of 4.2
 - Sound quality - 4.0, down slightly from 2002's result of 4.1
 - Response to inquiries - 3.76, up slightly from 3.7 in 2002
 - Number of channels - 4.01, down from 2002's 4.2
 - Overall customer satisfaction - 3.98, which is down from 2002's result of 4.0.

- To assess the accessibility of Comcast and its equipment for subscribers with disabilities, three questions were posed to survey respondents. 6.8 percent (55 of 811) reported a person in the household having a hearing or vision disability, which is up from six percent (44 of 783) over last year. Of those 55 respondents, 54.5 percent (30 of 55) reported a mobile, manual or dexterity impairment. Of the 55 subscribers who reported a person in the household with a disability, 27 indicated problems in their ability to access and/or change channels and 28 noted problems in their ability to discuss bills with Comcast. 27 respondents indicated that their ability to find a listing of cable programming was impaired. It should be noted that Comcast is equipped with a telecommunication device for the deaf (TTY) and has channel and program guides in Braille and large-print for the visually impaired. Staff is working with Comcast to address the other issues.

FISCAL IMPACT: None.

ATTACHMENT: Comcast Cable Communications 2003 Annual Cable Television Subscriber Survey Report and Survey Form

STAFF:
Rose Williams Boyd, Director of Citizen Assistance
Jacqueline Levy, Cable Television Administrator



2003 ANNUAL REPORT

CUSTOMER OPINION SURVEY

AUGUST 29, 2003



***2003
Comcast
Cable Television
Subscriber Survey
Alexandria, Virginia***

2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

SURVEY METHODOLOGY

All of the following charts and graphs are based on responses from a structured phone survey conducted with a random probability sample of 811 Alexandria active cable television customers. Calling began on July 10th and was completed July 25th, 2003. Calls were placed primarily during evening hours weekdays and weekends as well as daytimes on Saturday and Sunday. This year's calling schedule also included calls during the weekday in order to maximize participation of households with shift workers.

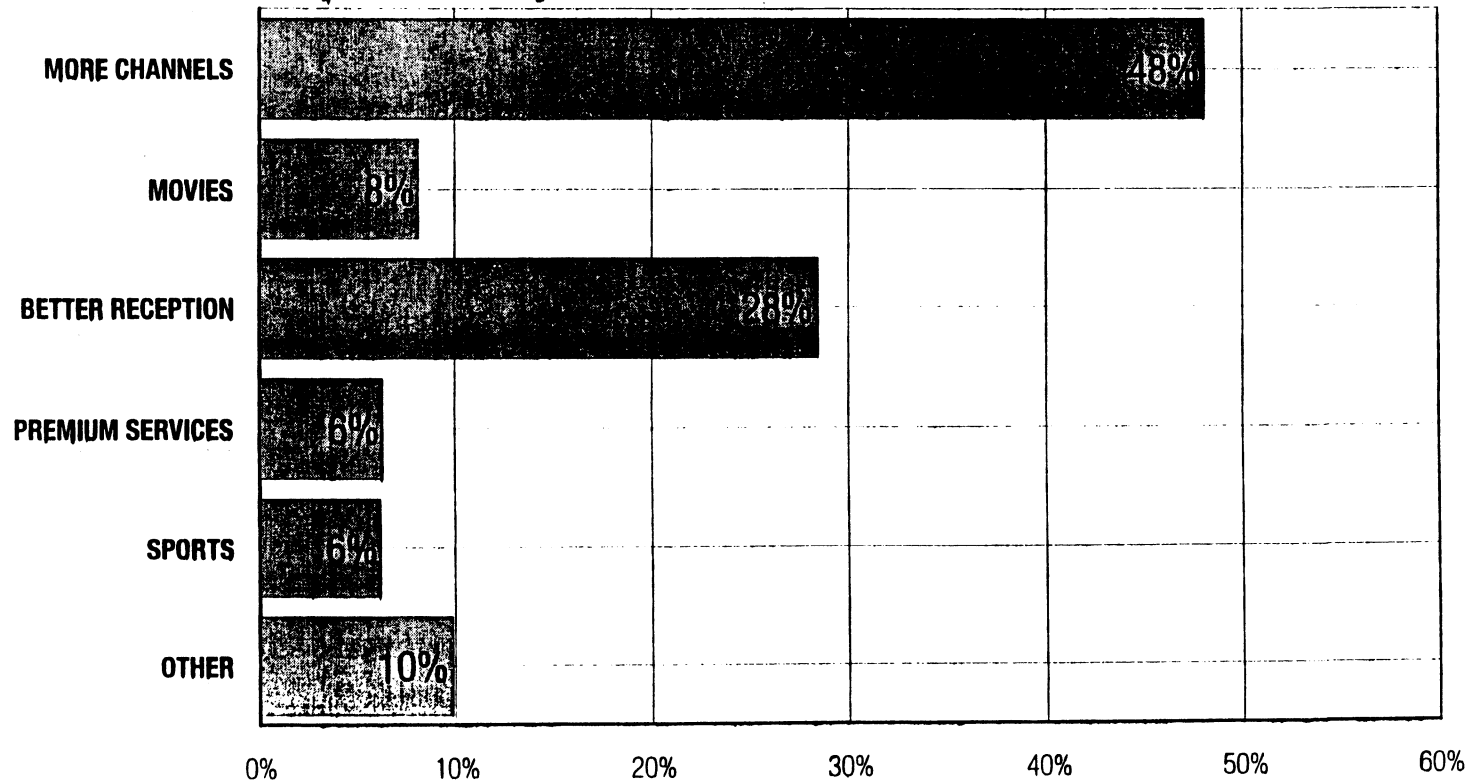
All surveys were completed from Q7's fully supervised calling center. Prior to the beginning of data collection, all surveyors were trained specifically on each survey question and its response set. At least once per shift, each surveyor was monitored on-line while conducting an actual survey. Some of the questions asked were based on previous versions of the same study completed in earlier years.

✓ In order to generate a random probability of households, the calling list provided to Q7 was randomized prior to outbound dialing. The completed sample response includes 811 customers. This sample size will generate data useful in making business decisions based on commonly accepted statistical norms at the 95% confidence level with a margin of error of +/-3.42%, assuming an overall population of approximately 65,000.



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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



1).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

What is the major reason you subscribe to cable television at this time?
"Other" answers

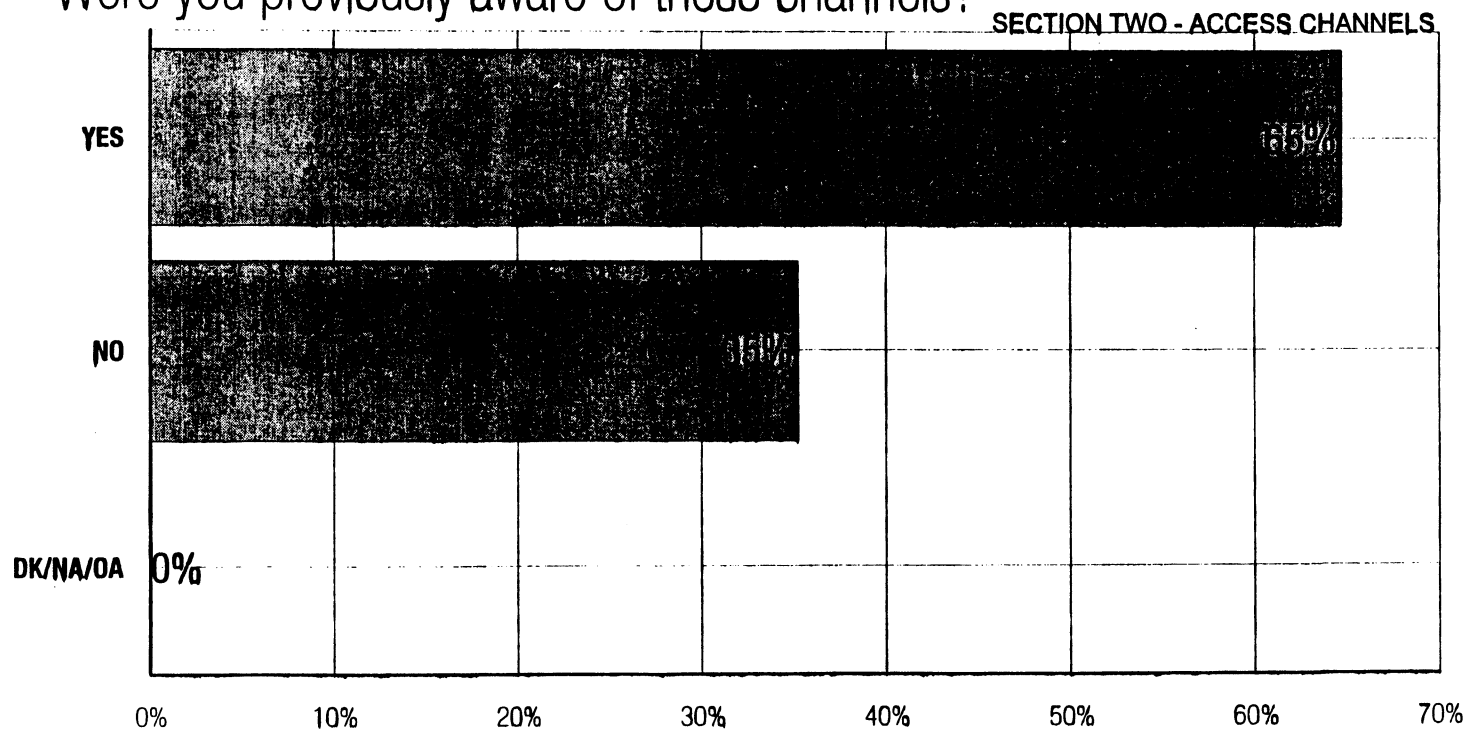
Reason	Answers
All of the Above	5
Only Cable Available	39
Cable News	12
Children's Shows	6
Access to Internet	5
Package Offer	3
Already Had	3
Spanish Shows	2
Digital	2
Loyalty	1
Convenience	1
Garden Shows	1



2007 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Comcast currently has five access channels;
The City Government Access Channel on Channel 70,
The Educational Access Channels on 71, 72, 73
and The Community Channel on Channel 69.

Were you previously aware of these channels?



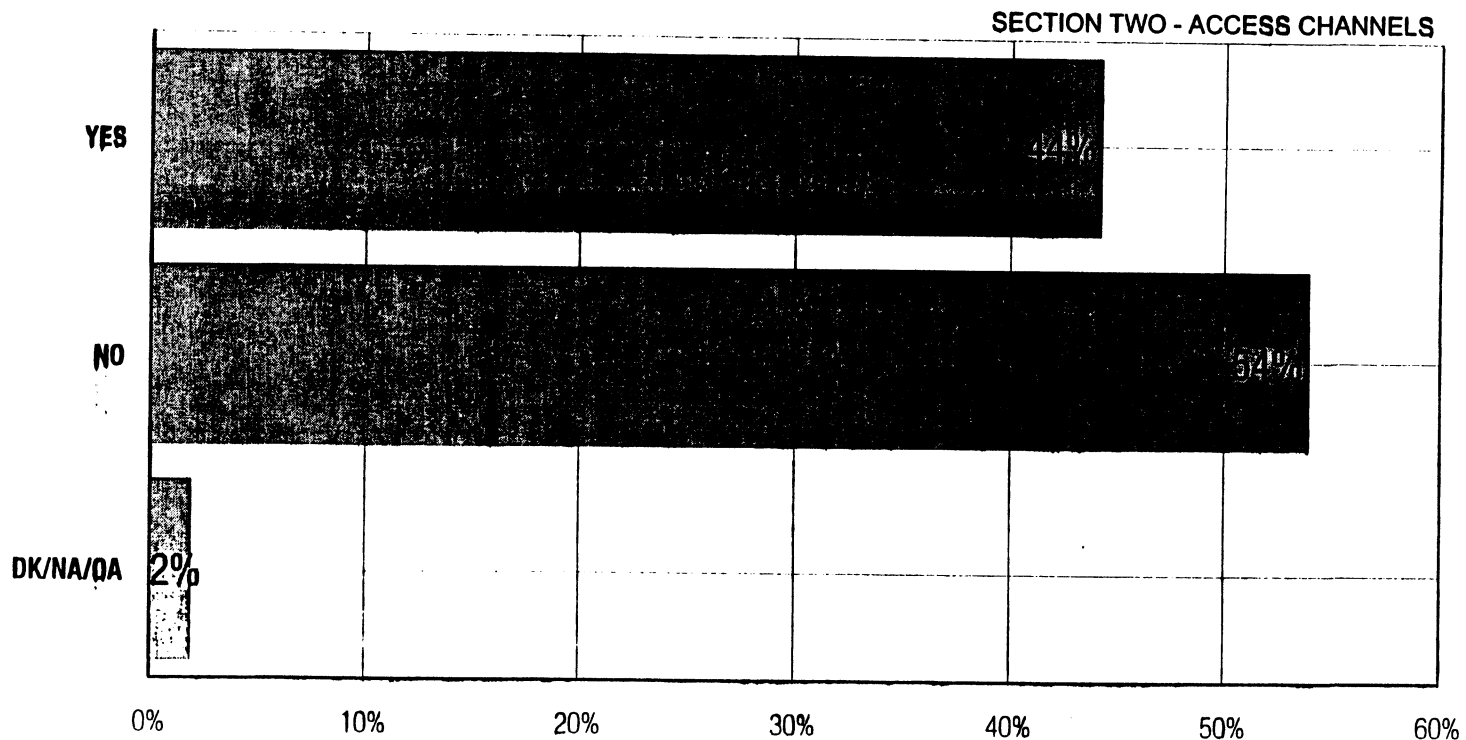
1).



2011 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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 watch Channel 70 programming?

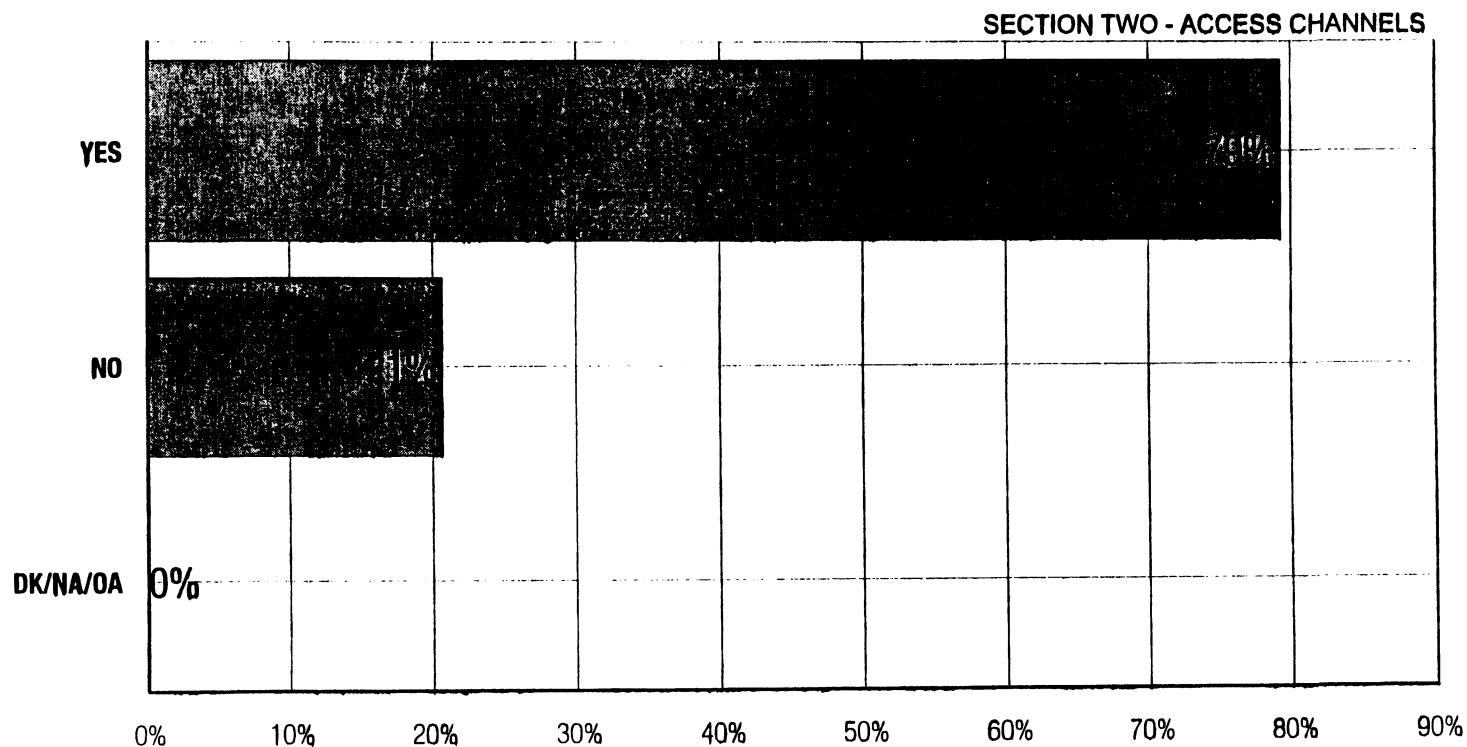


□ 2).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Have you ever watched an Alexandria City Council meeting?

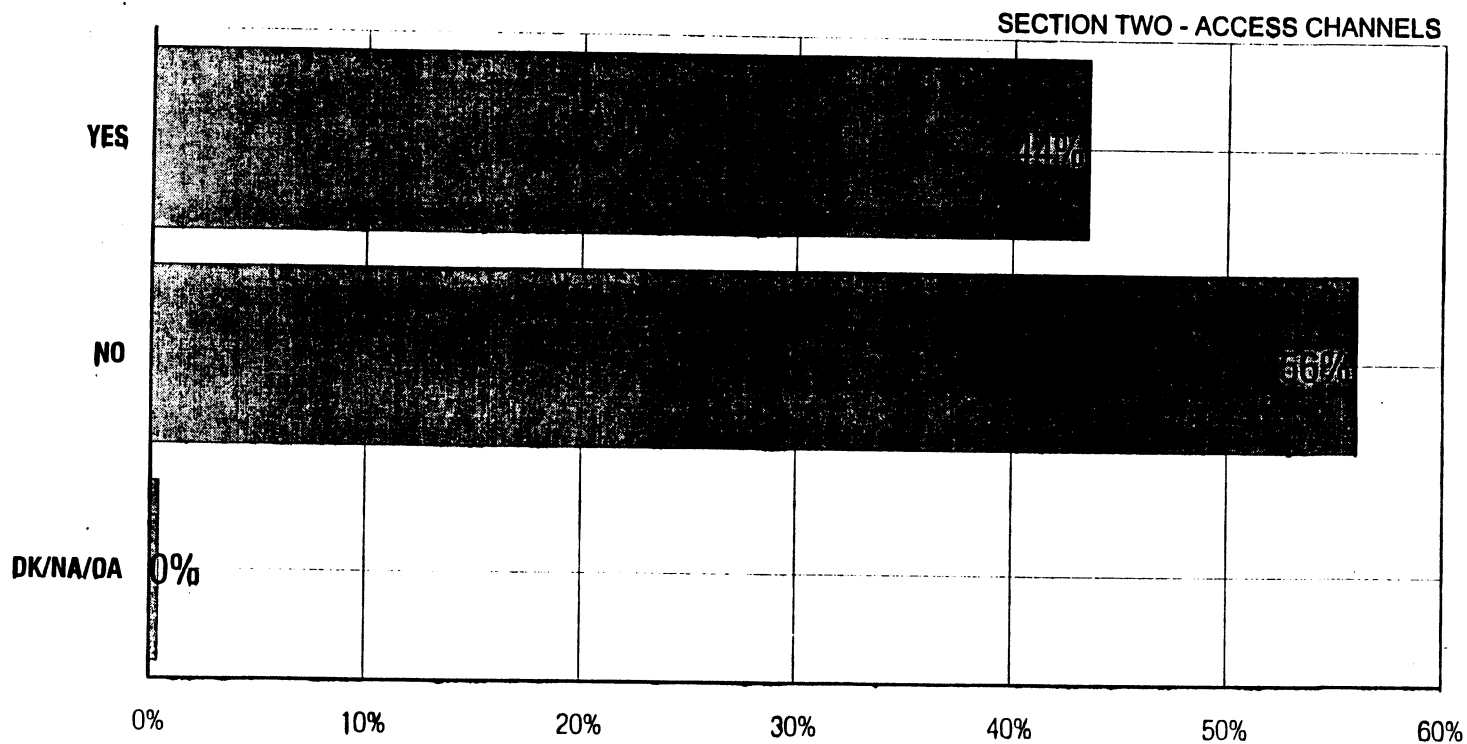


2a).



2007 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Have you ever watched a Saturday public hearing?

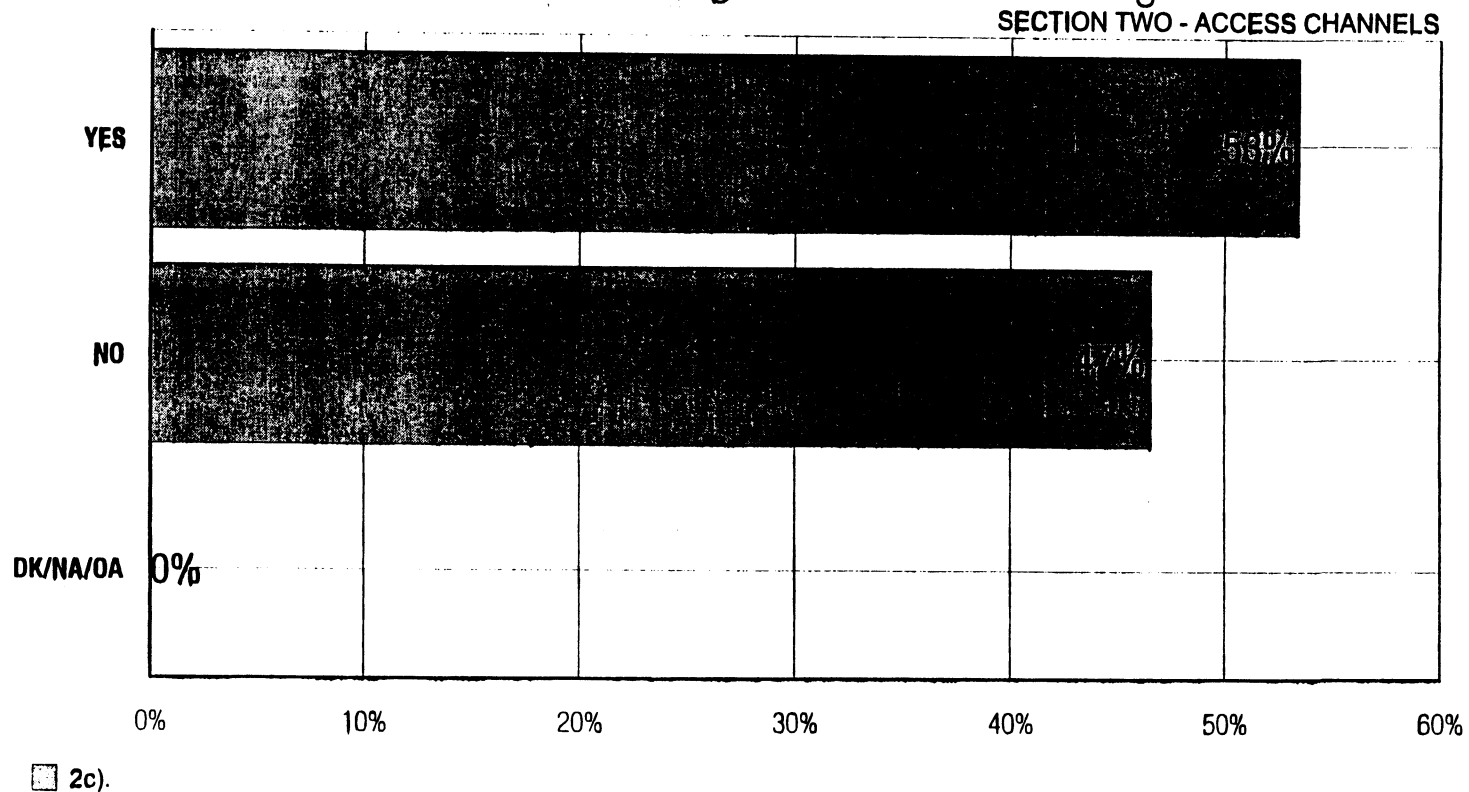


2b).



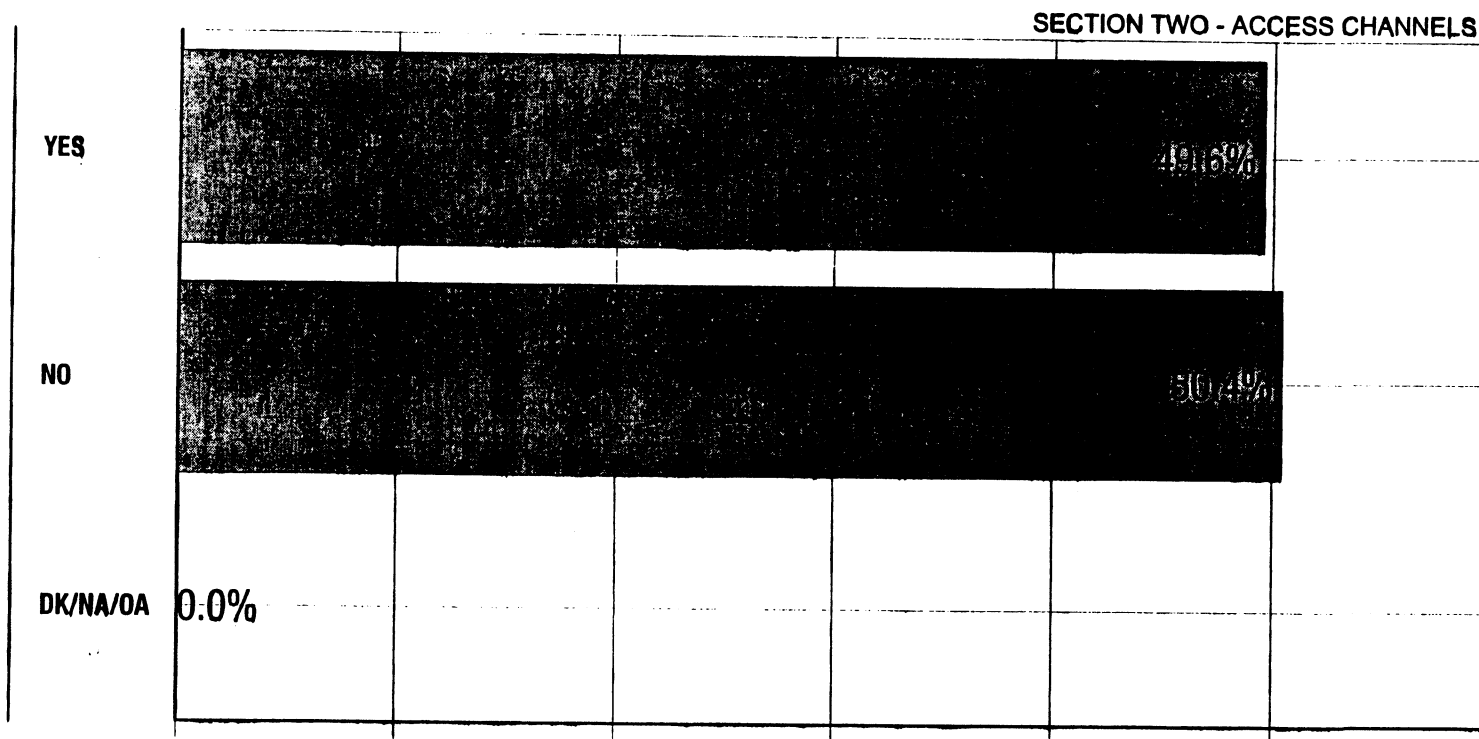
2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Have you ever watched a Planning Commission meeting?



2007 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Have you ever watched a Board of Zoning Appeals meeting?

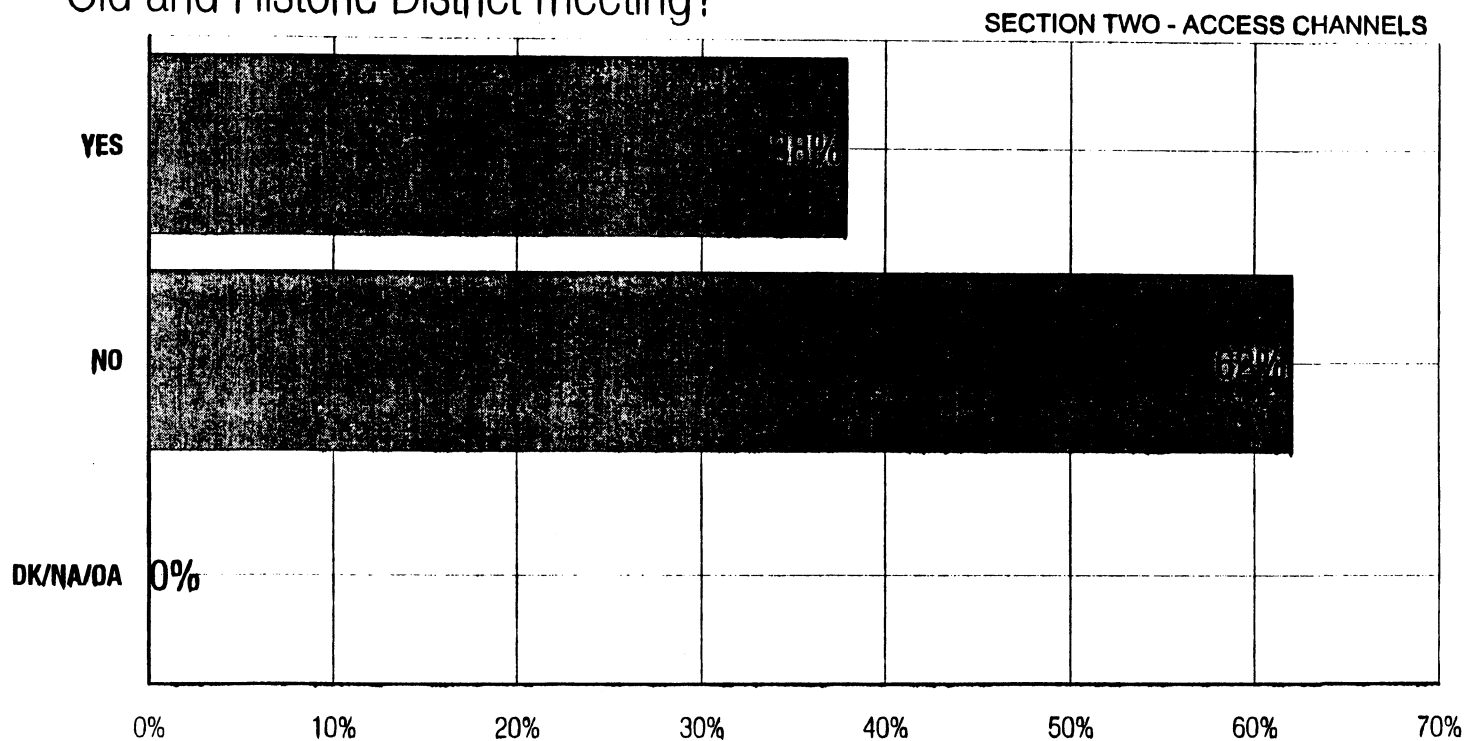


2d).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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

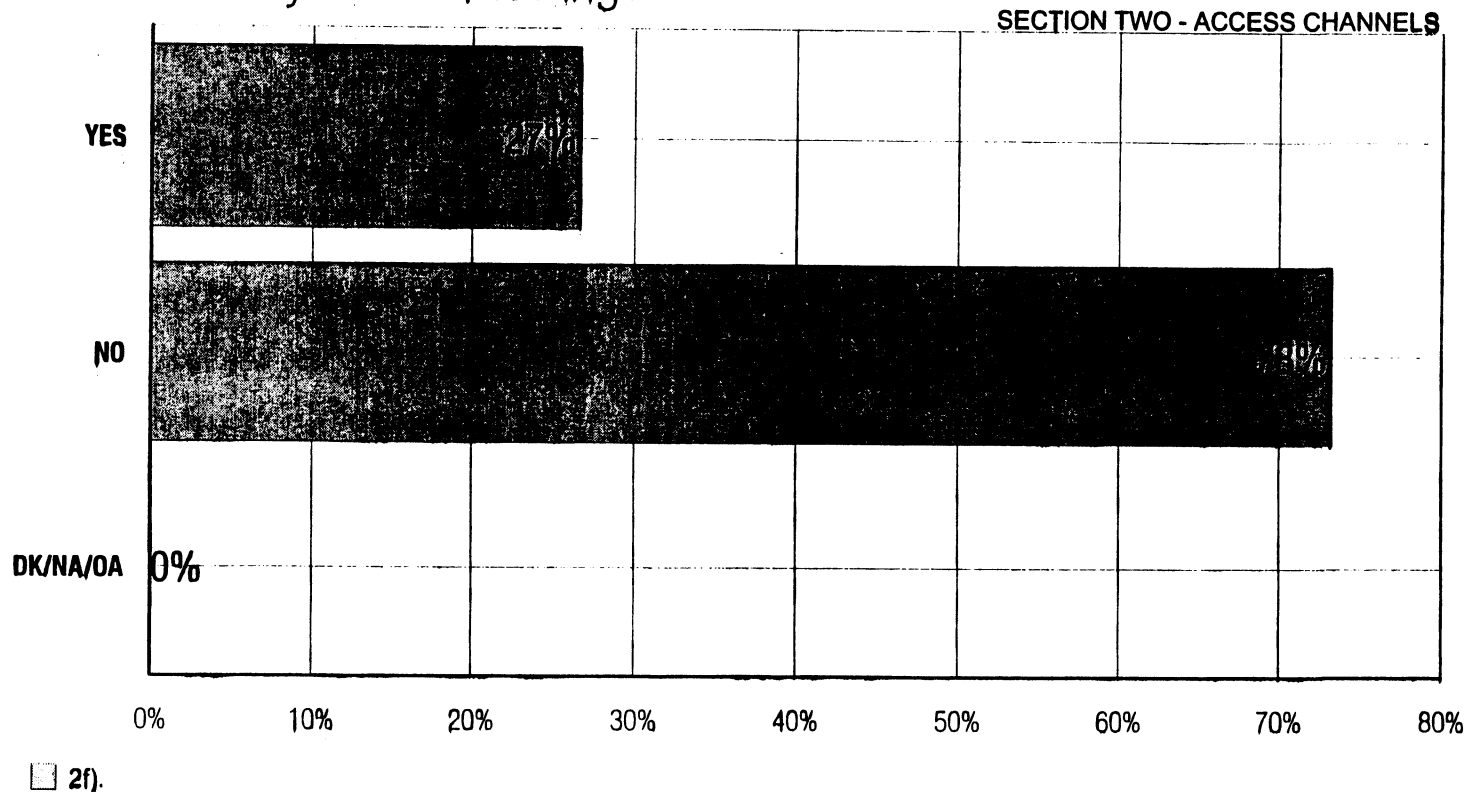


2e).



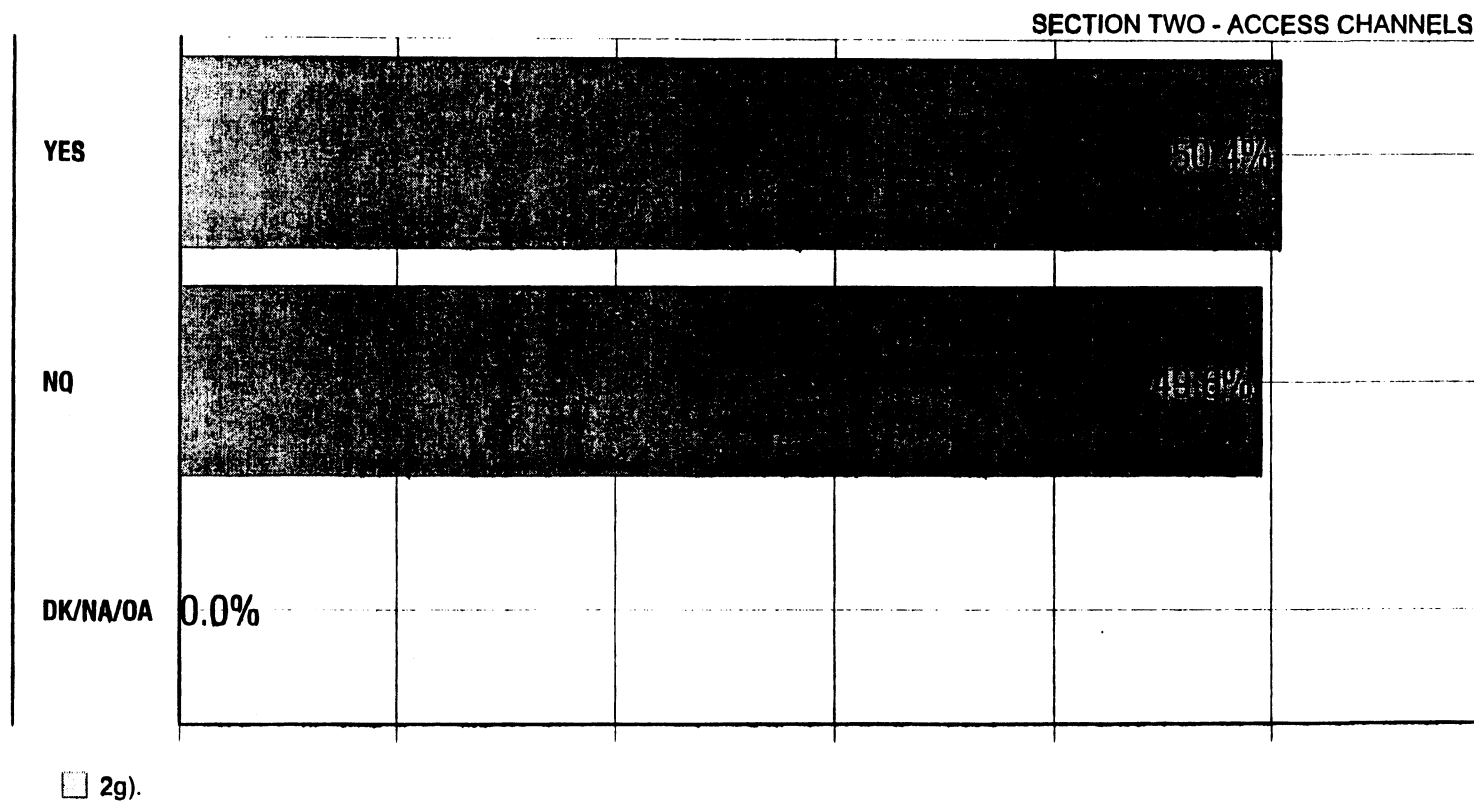
2007 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Have you ever watched a Board of Architectural Review -
Parker-Gray District meeting?



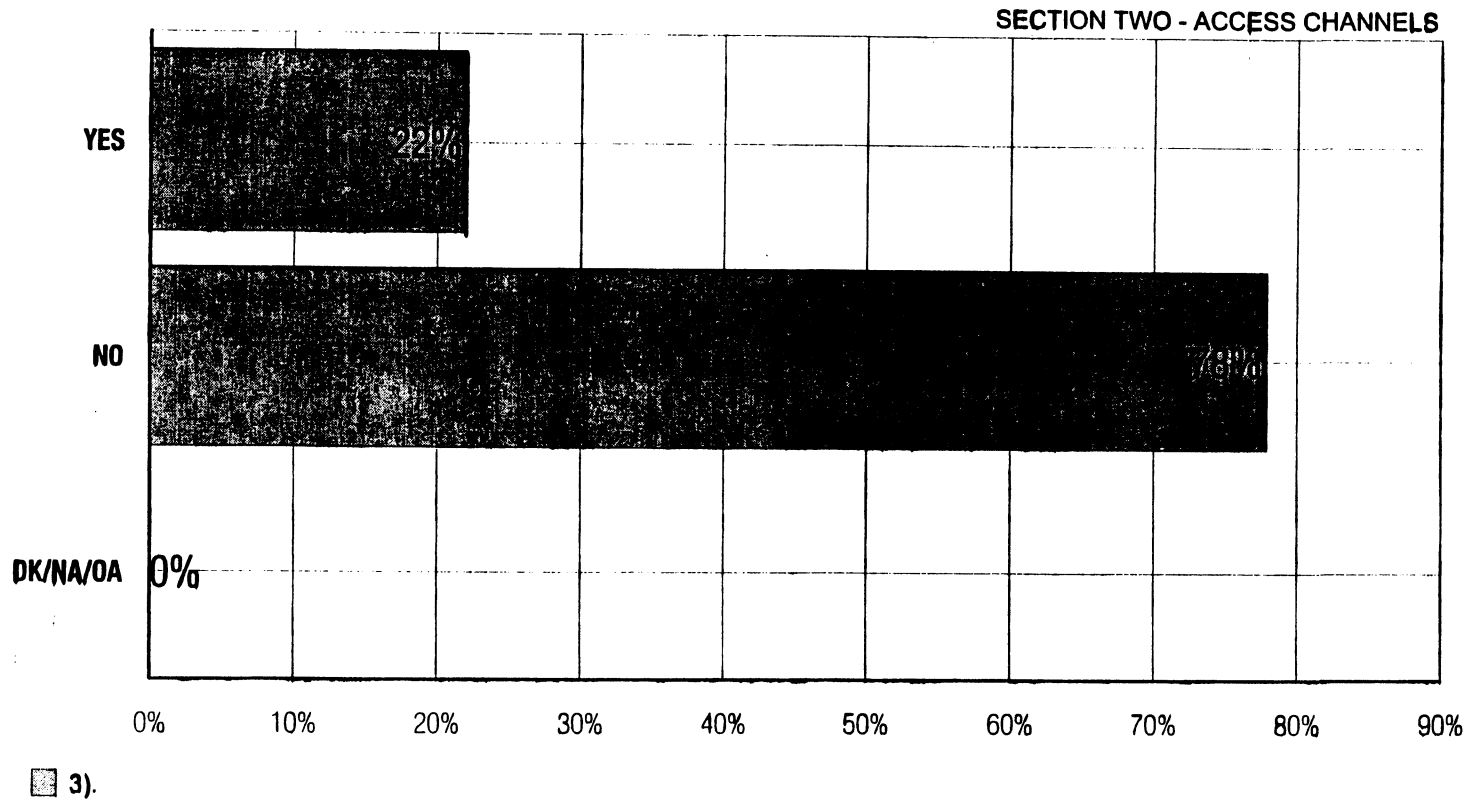
2011 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Have you ever watched a School Board meeting?



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Would you be interested in specific programming that highlights City services, programs or projects?

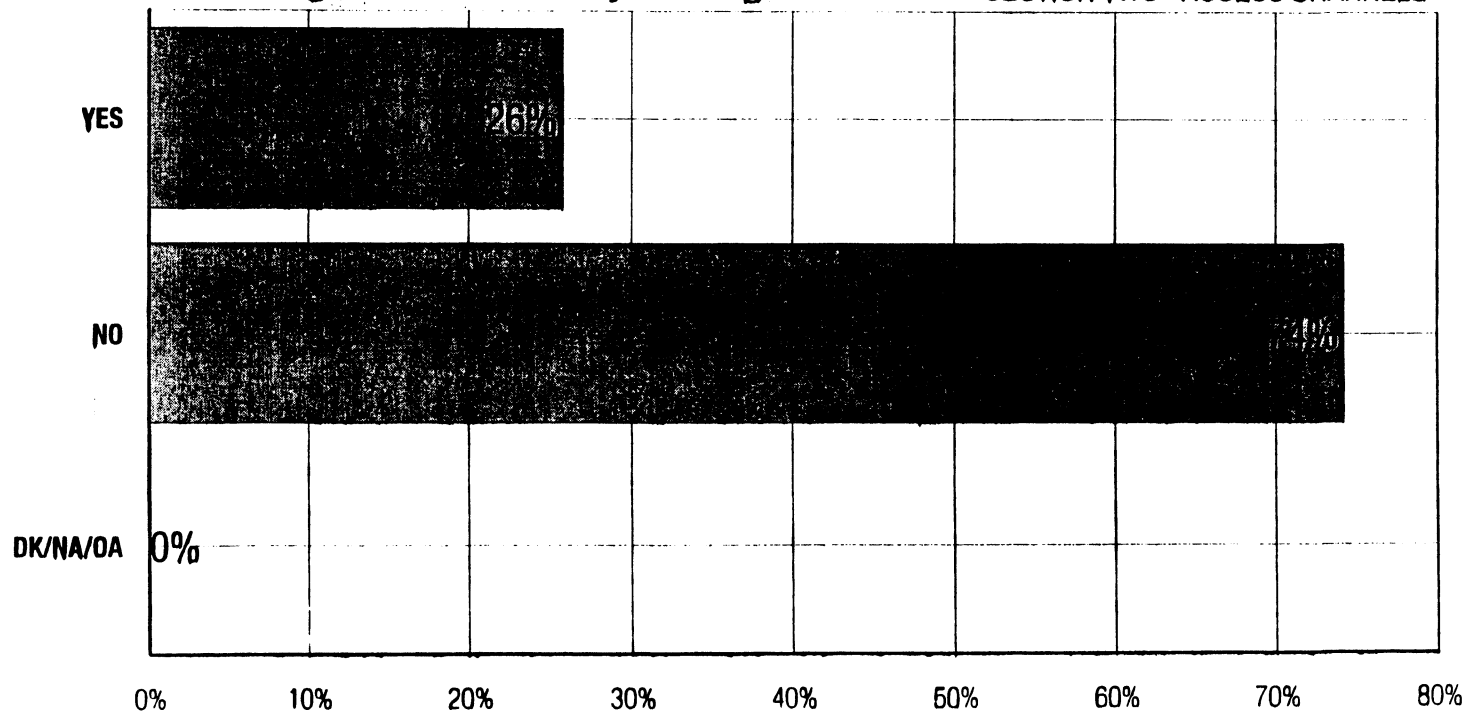


2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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 TV's is used by the Alexandria City Public School System.

Have you ever watched the telecourses sponsored by Northern Virginia Community College?

SECTION TWO - ACCESS CHANNELS

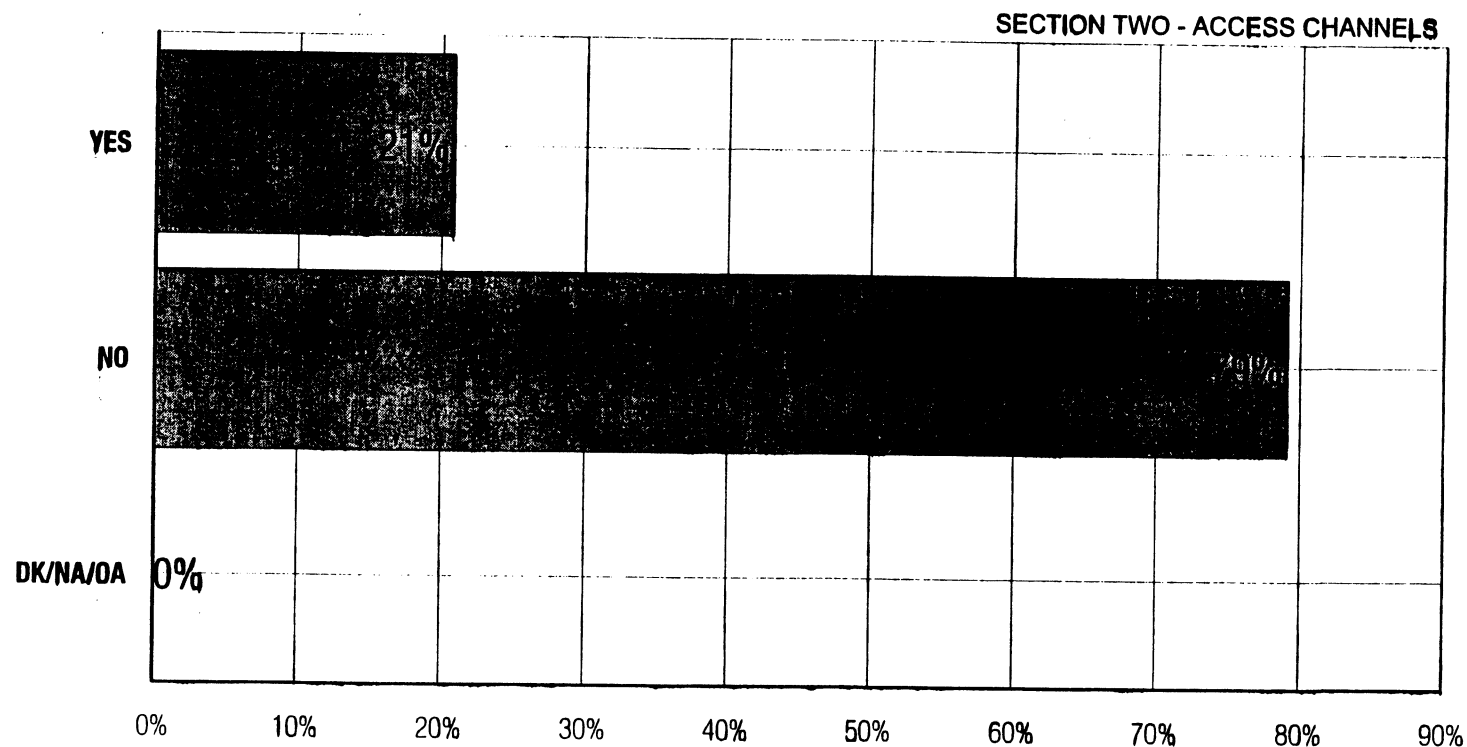


4a).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Have you ever watched the telecourses sponsored by George Mason University?

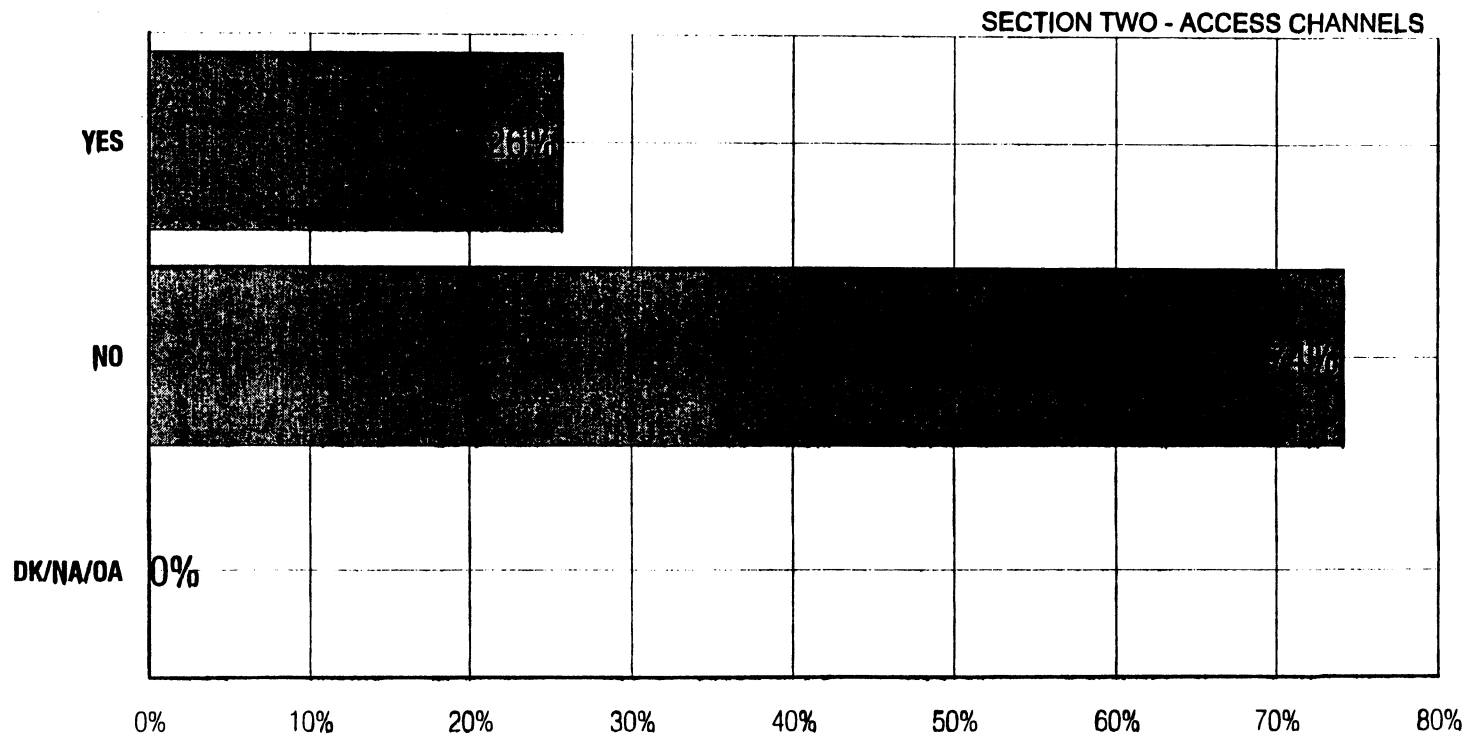


4b).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Have you ever watched any of the programming sponsored by the Alexandria City Public School?

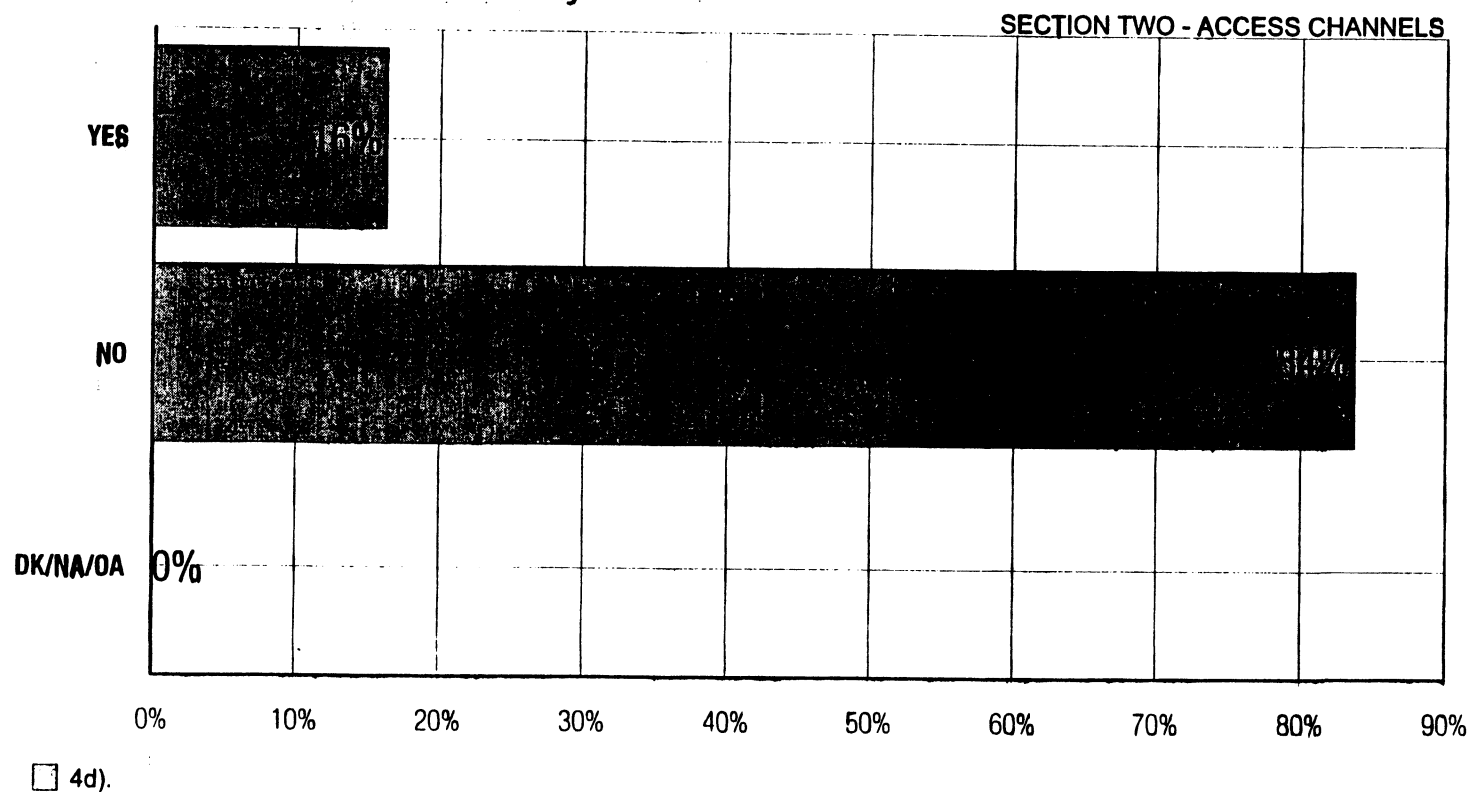


4c).



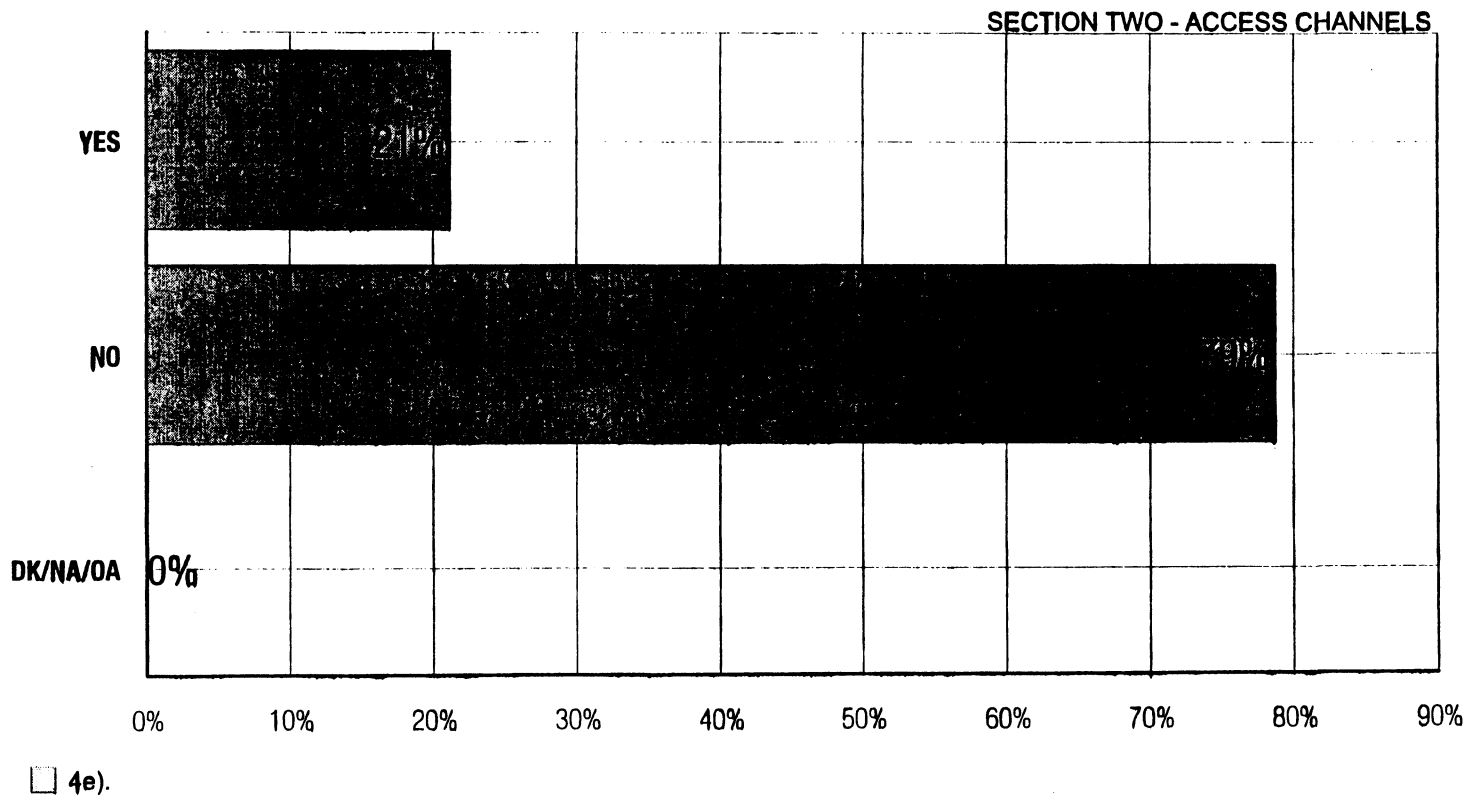
2002 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Do you presently have children enrolled in the Alexandria Public School System?



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Instructional programming can also be seen on WNVT-53/Channel 25. Have you ever watched instructional programming sponsored by WNVT-53/Channel 25?

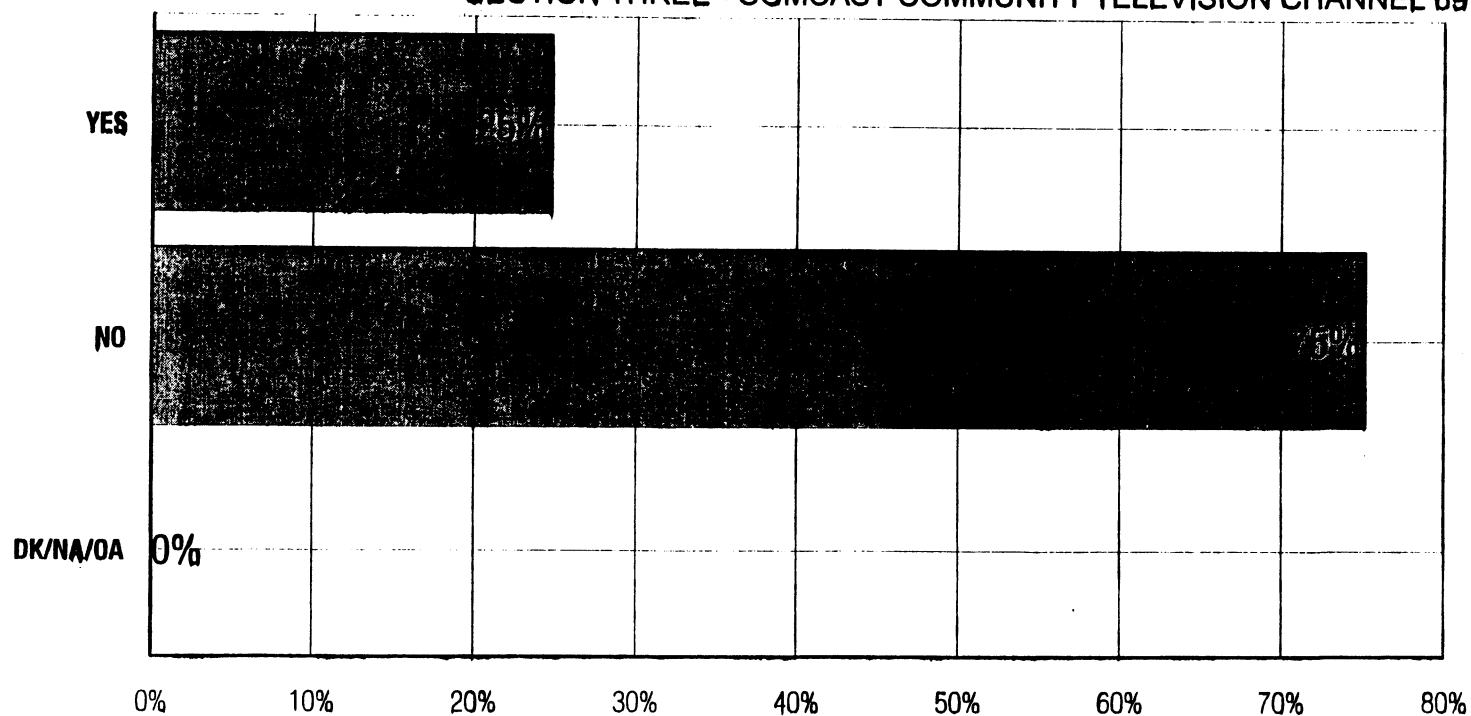


2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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.

Have you ever watched the programming on Channel 69?

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69

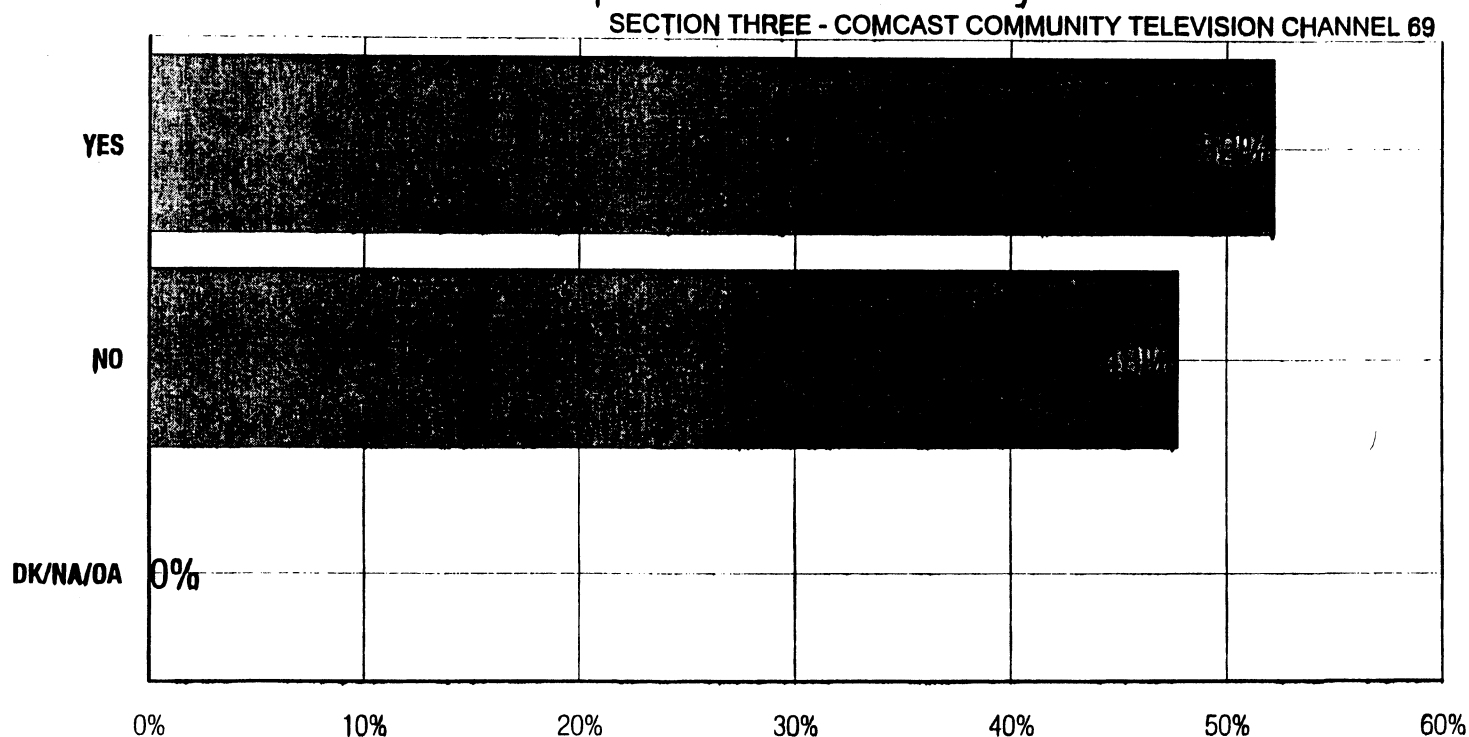


1).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Have you ever watched the Community Bulletin Board on Channel 69 from 11:00 pm to 5:30 am daily?



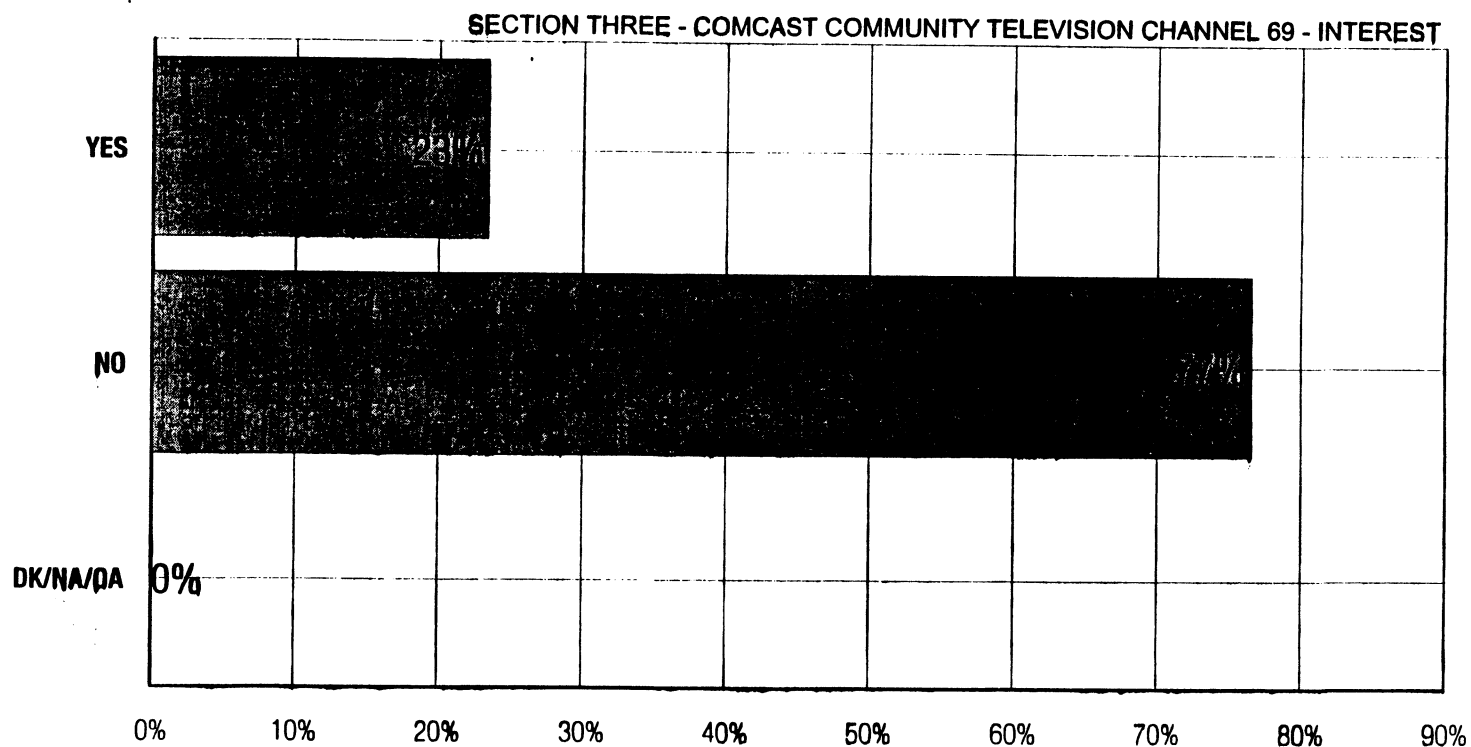
2).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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

Local high school sports?



3a).

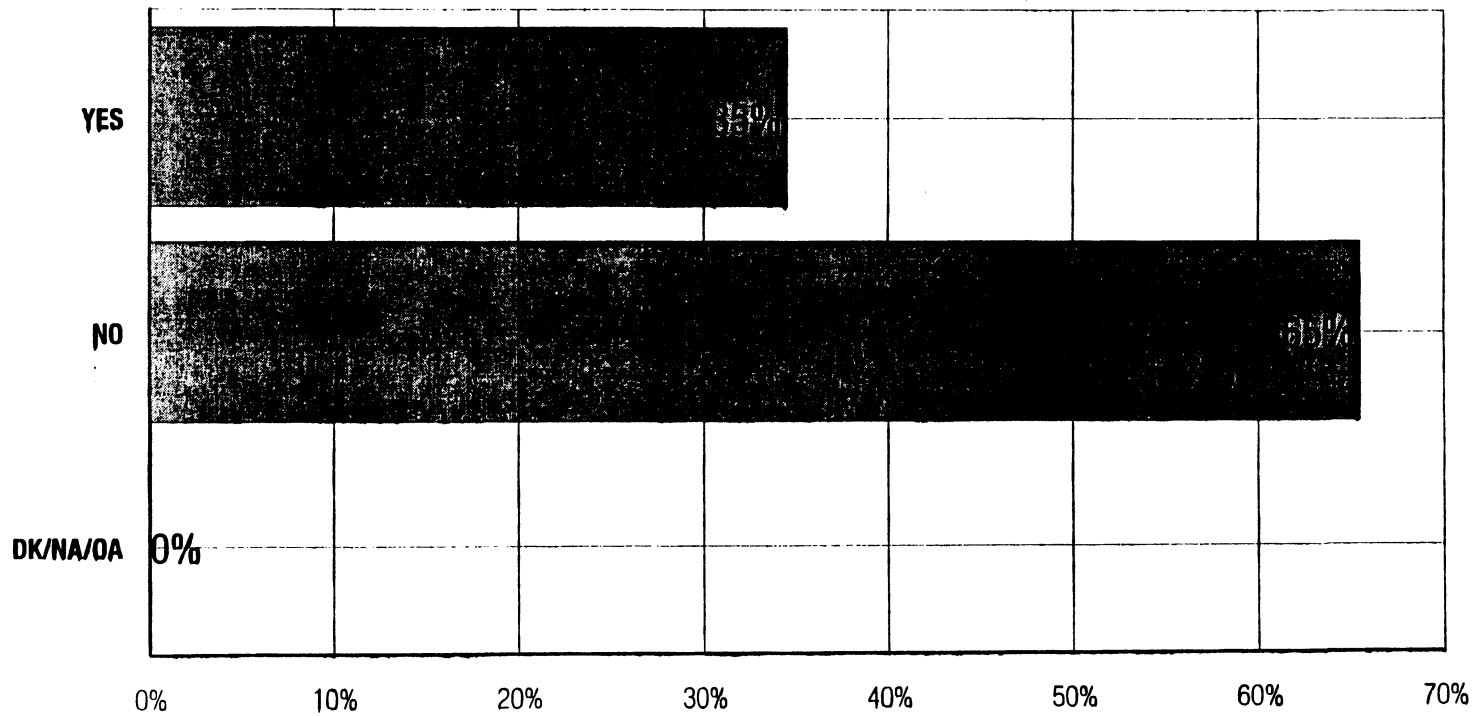


2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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

Civic/Informational Shows?

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69 - INTEREST



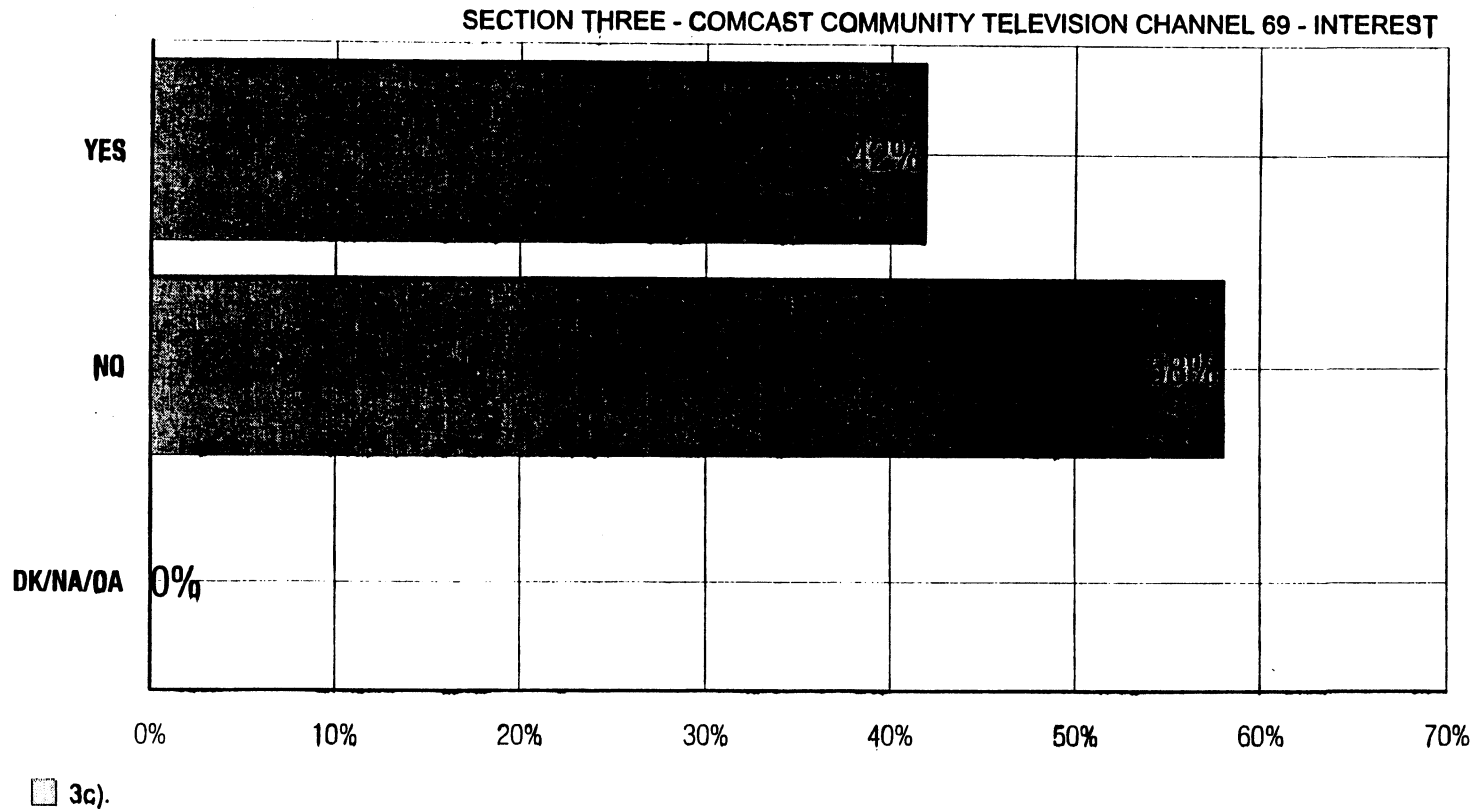
3b).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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

Entertainment Shows?

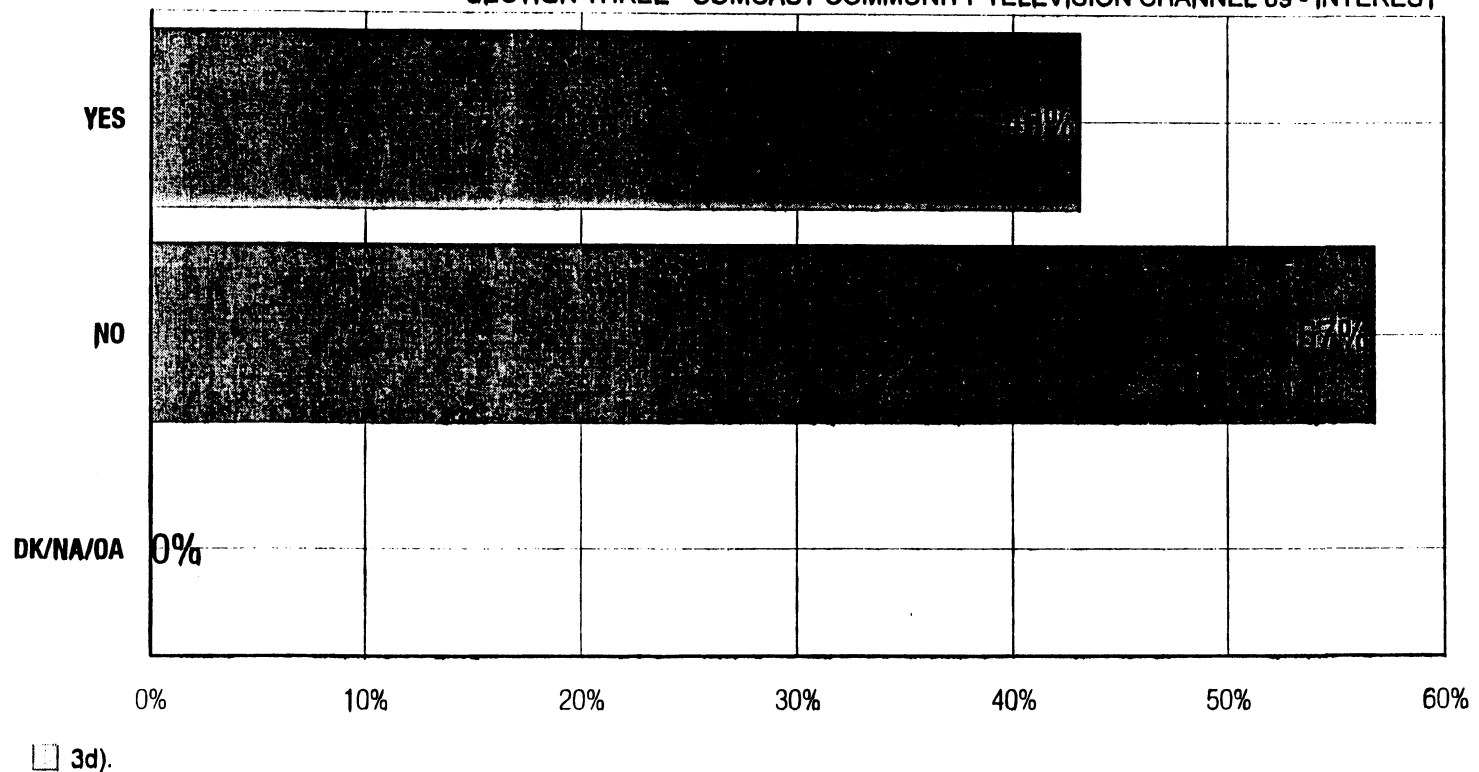


2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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

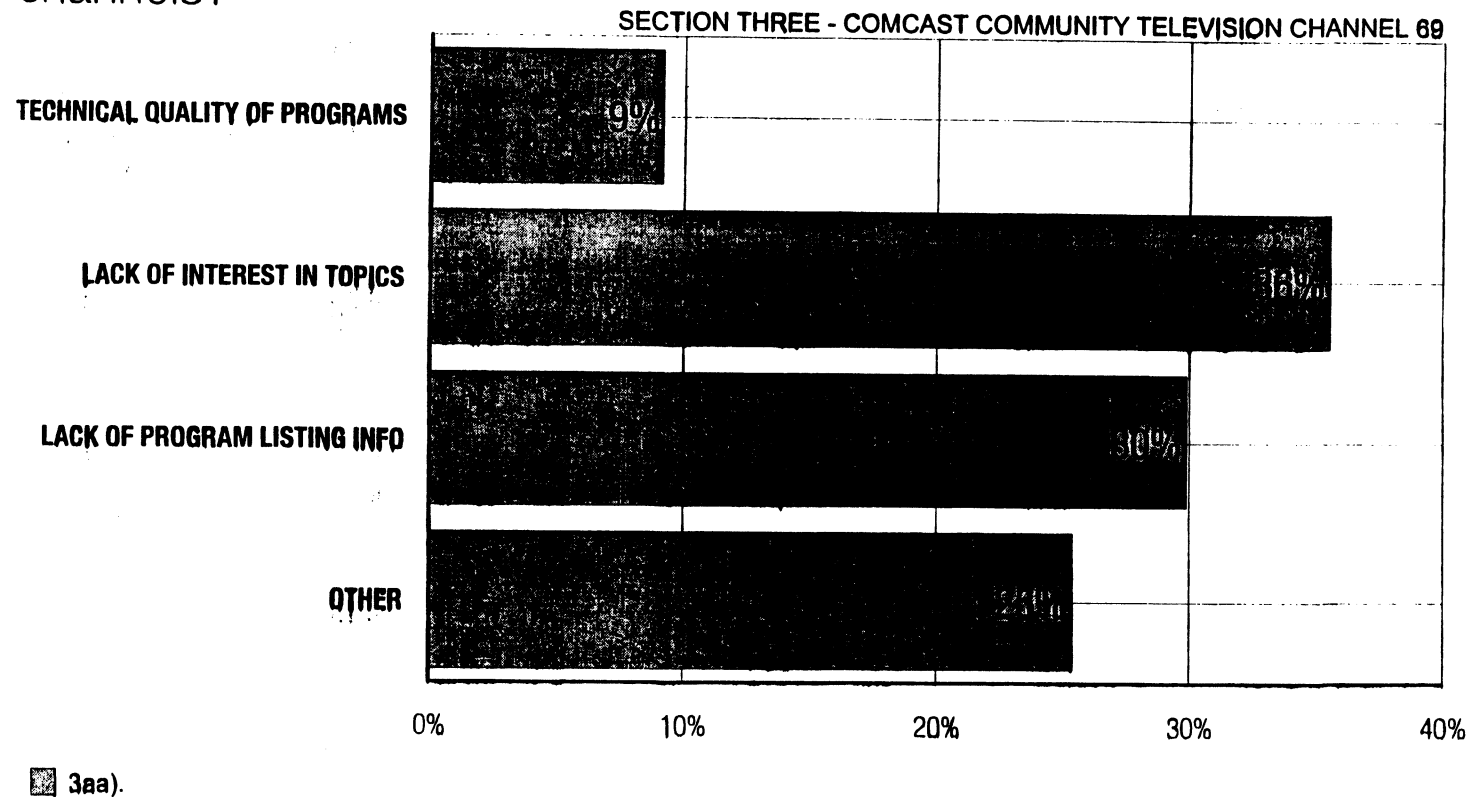
Current Local Events?

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69 - INTEREST



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

What are the biggest obstacles to your watching more programs on the PEG channels?



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

What are the biggest obstacles to your watching more programs on the PEG channels?

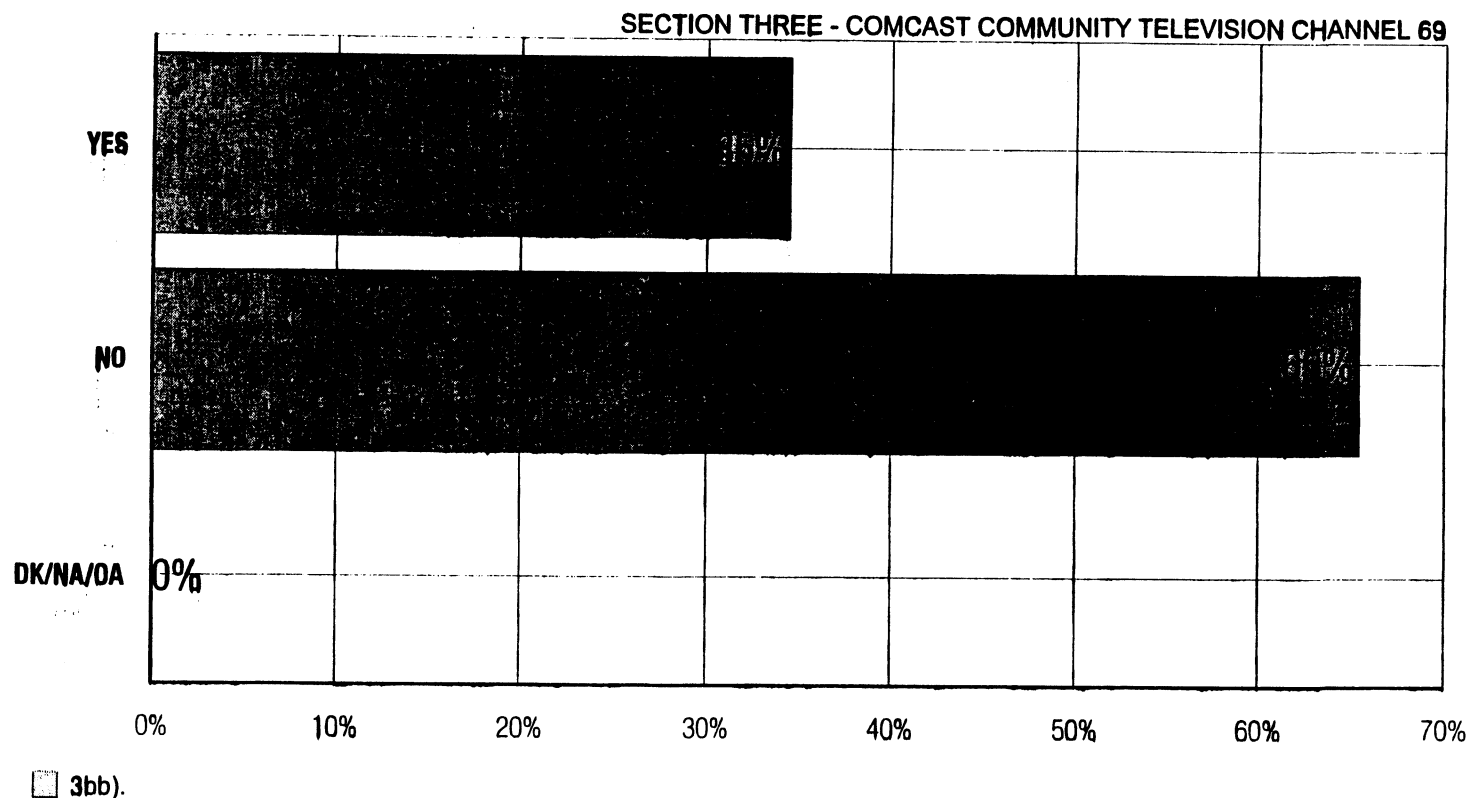
"Other" answers

Answer	Subscribers
Lack of Interest	81
Lack of Time to Watch	74
Lack of Information on What/When Programs are on	22
Technical Quality	15
Does Not Receive PEG Channels	8



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

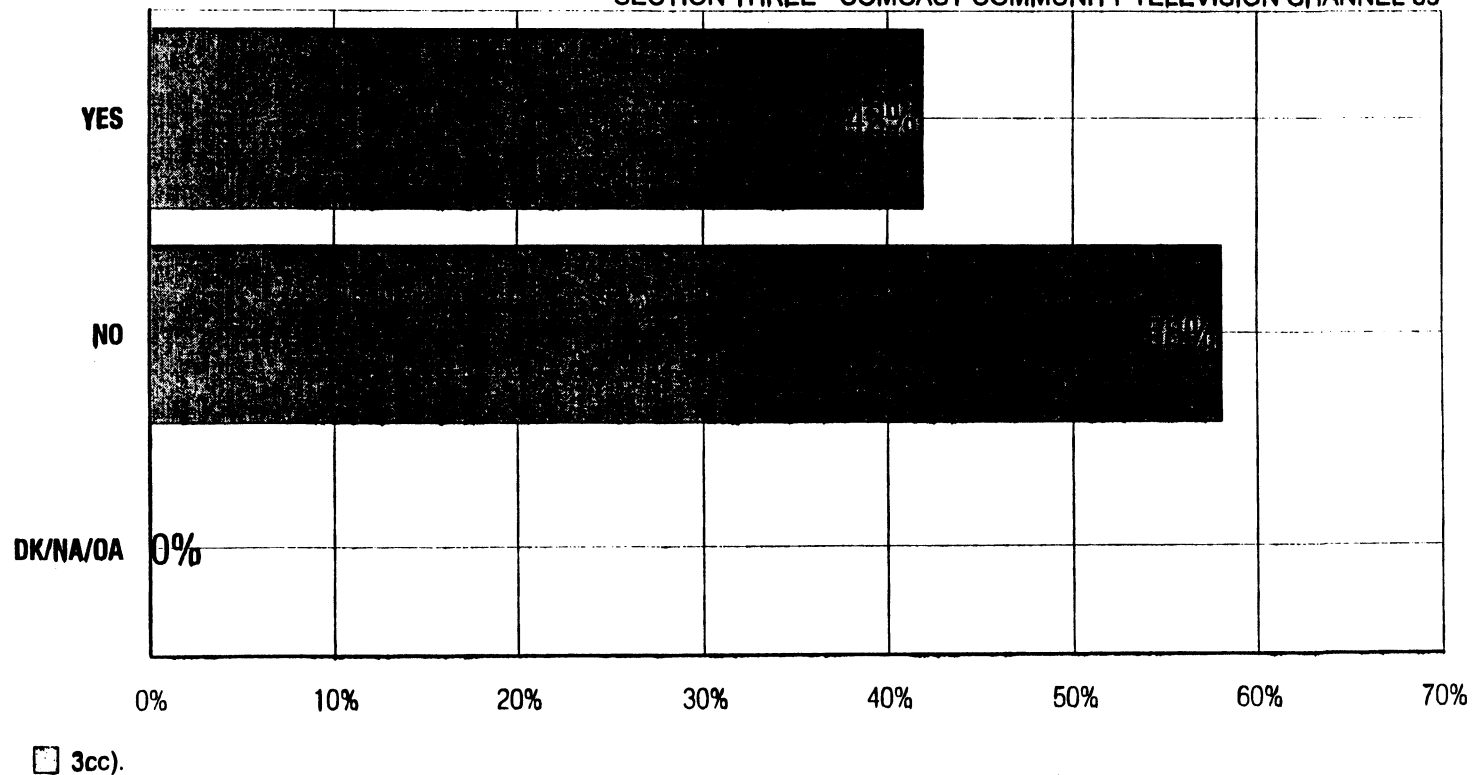
Have you ever considered producing a show on the Community Channel?



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

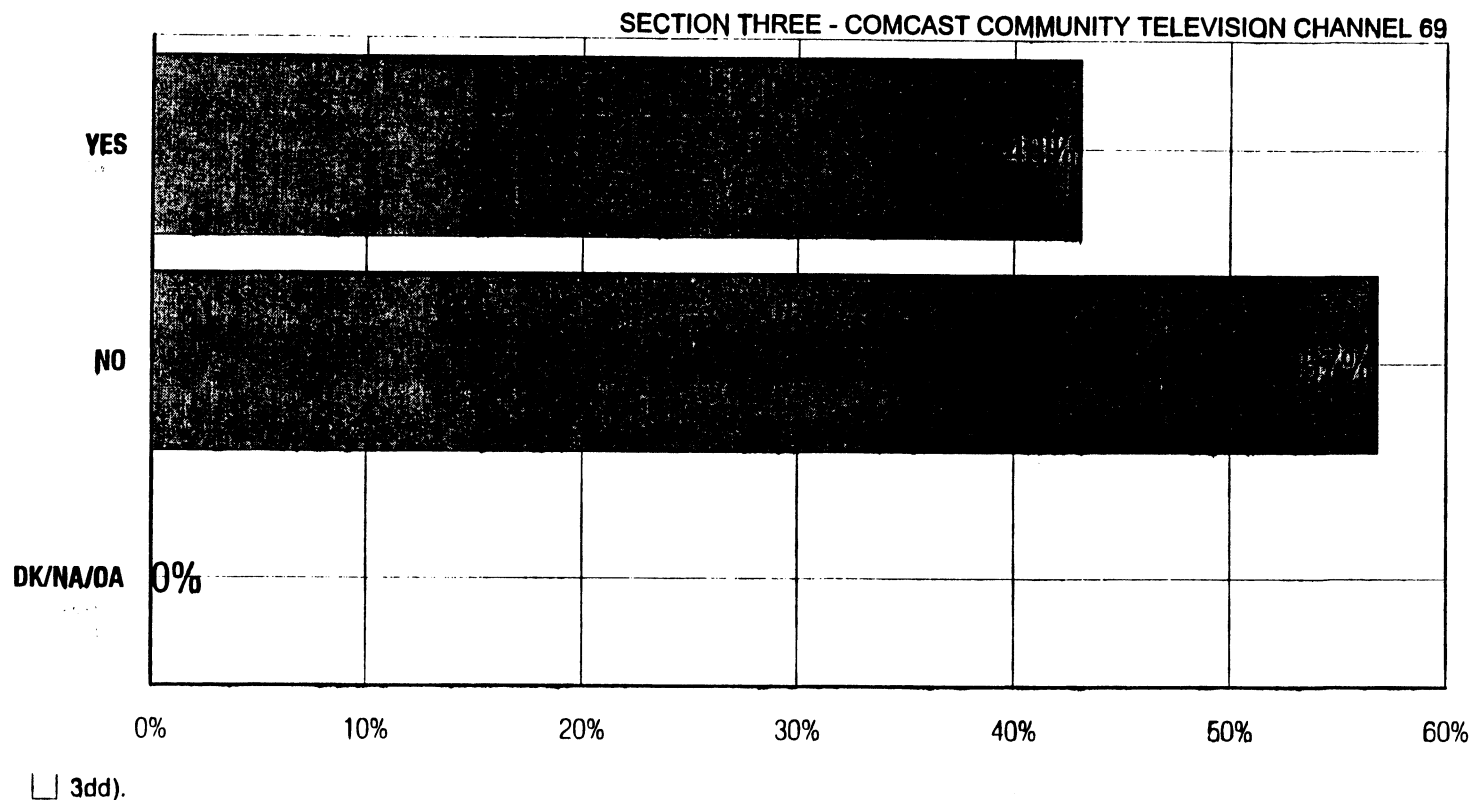
Are you aware that Comcast conducts Community Programming Volunteer Operations classes in television production for a nominal fee?

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 69



2013 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

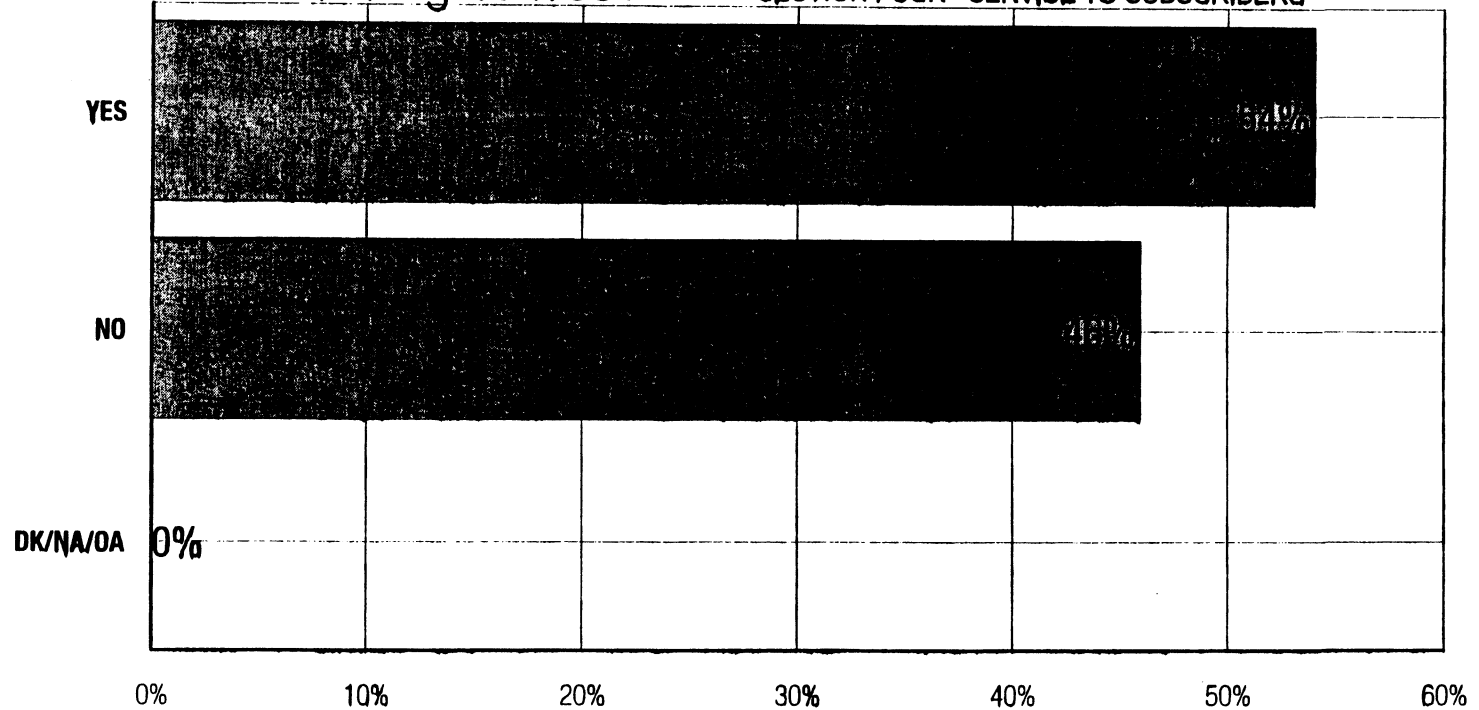
Would you be interested in taking such a class?



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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

SECTION FOUR - SERVICE TO SUBSCRIBERS



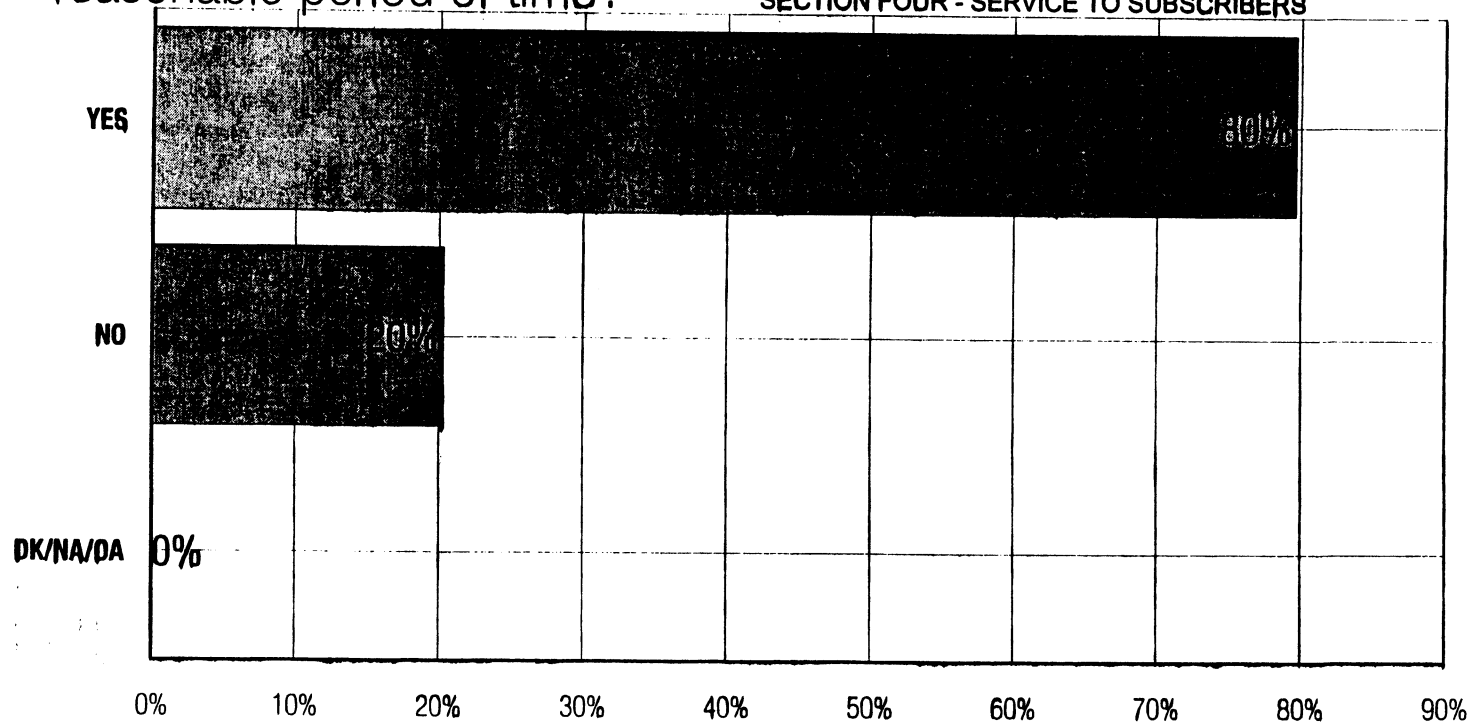
1).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Was your call answered within a reasonable period of time?

SECTION FOUR - SERVICE TO SUBSCRIBERS



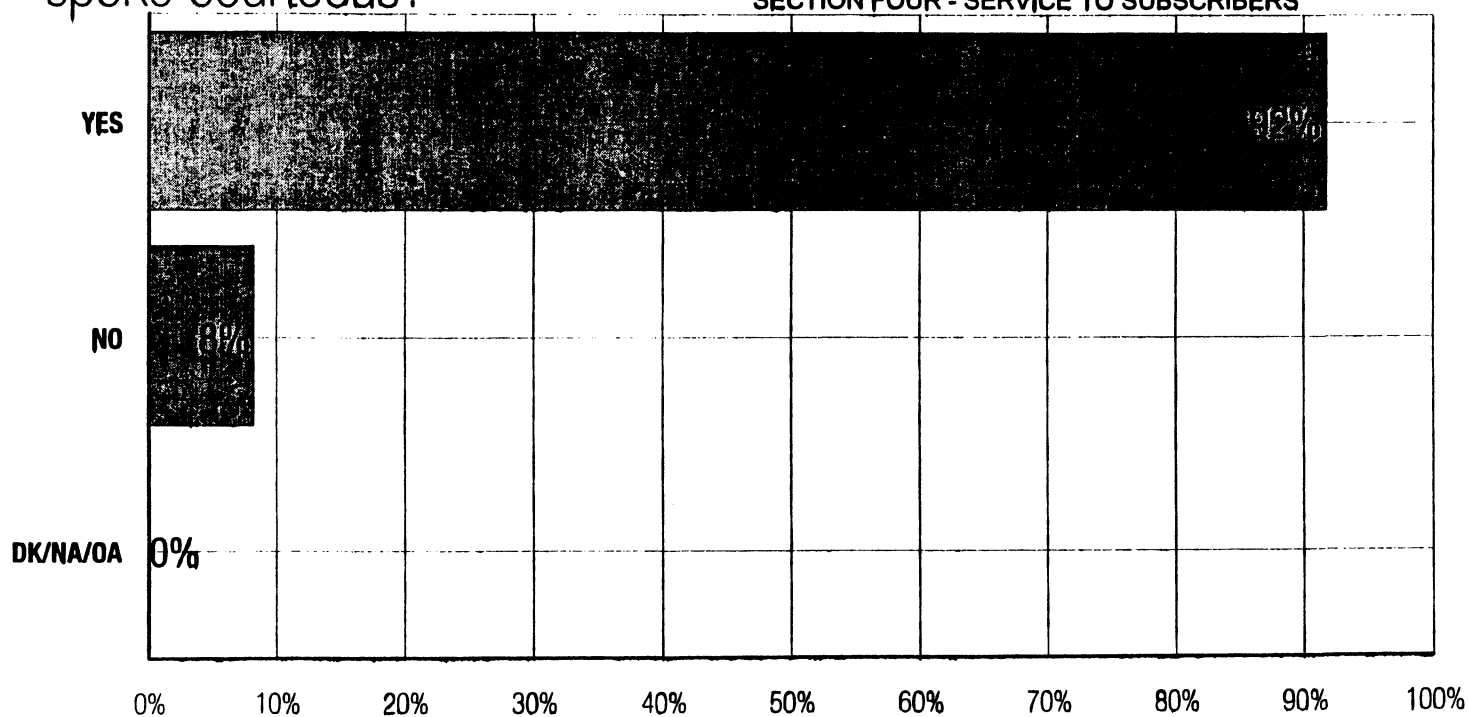
■ 1a).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Was the person with whom you spoke courteous?

SECTION FOUR - SERVICE TO SUBSCRIBERS

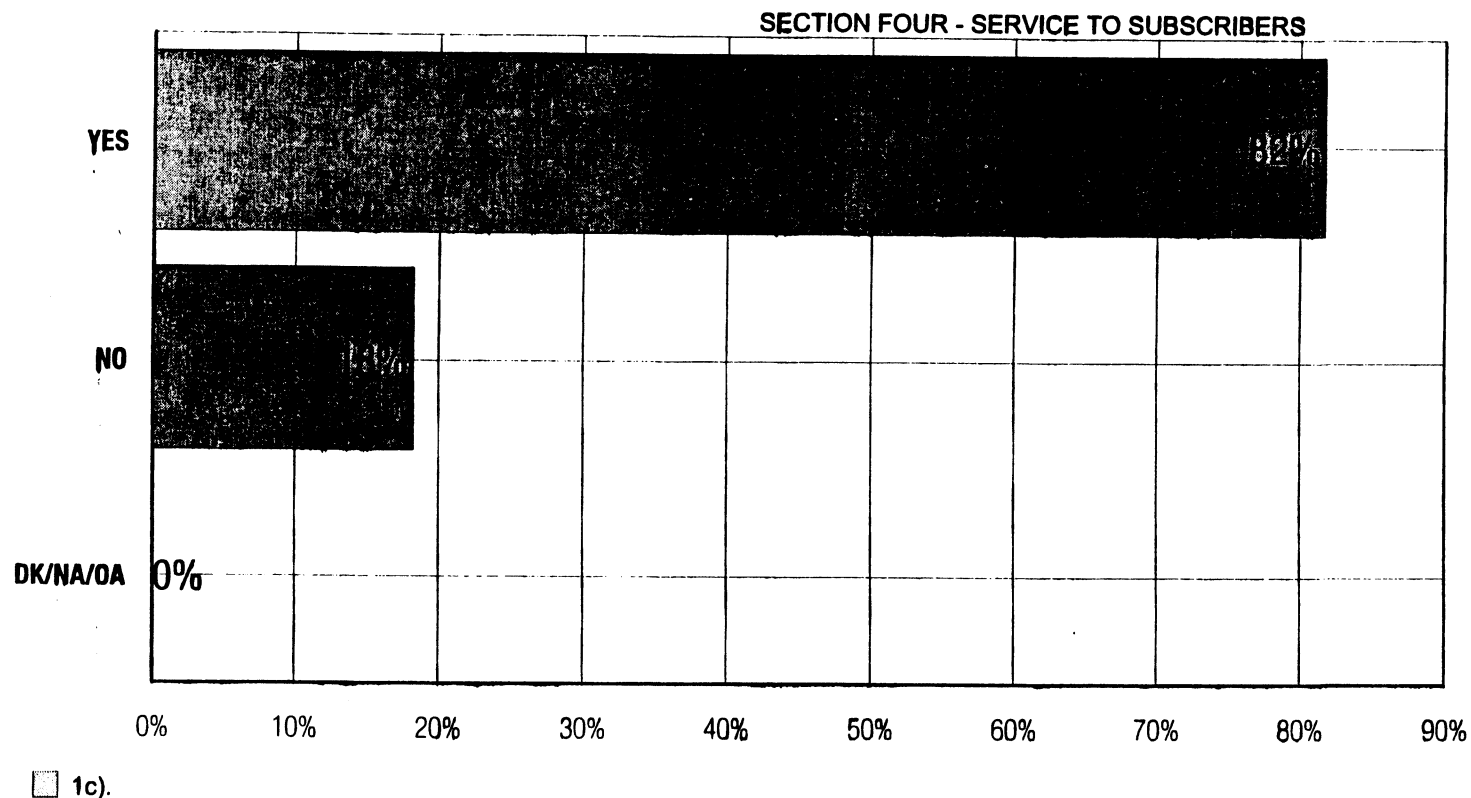


1b).



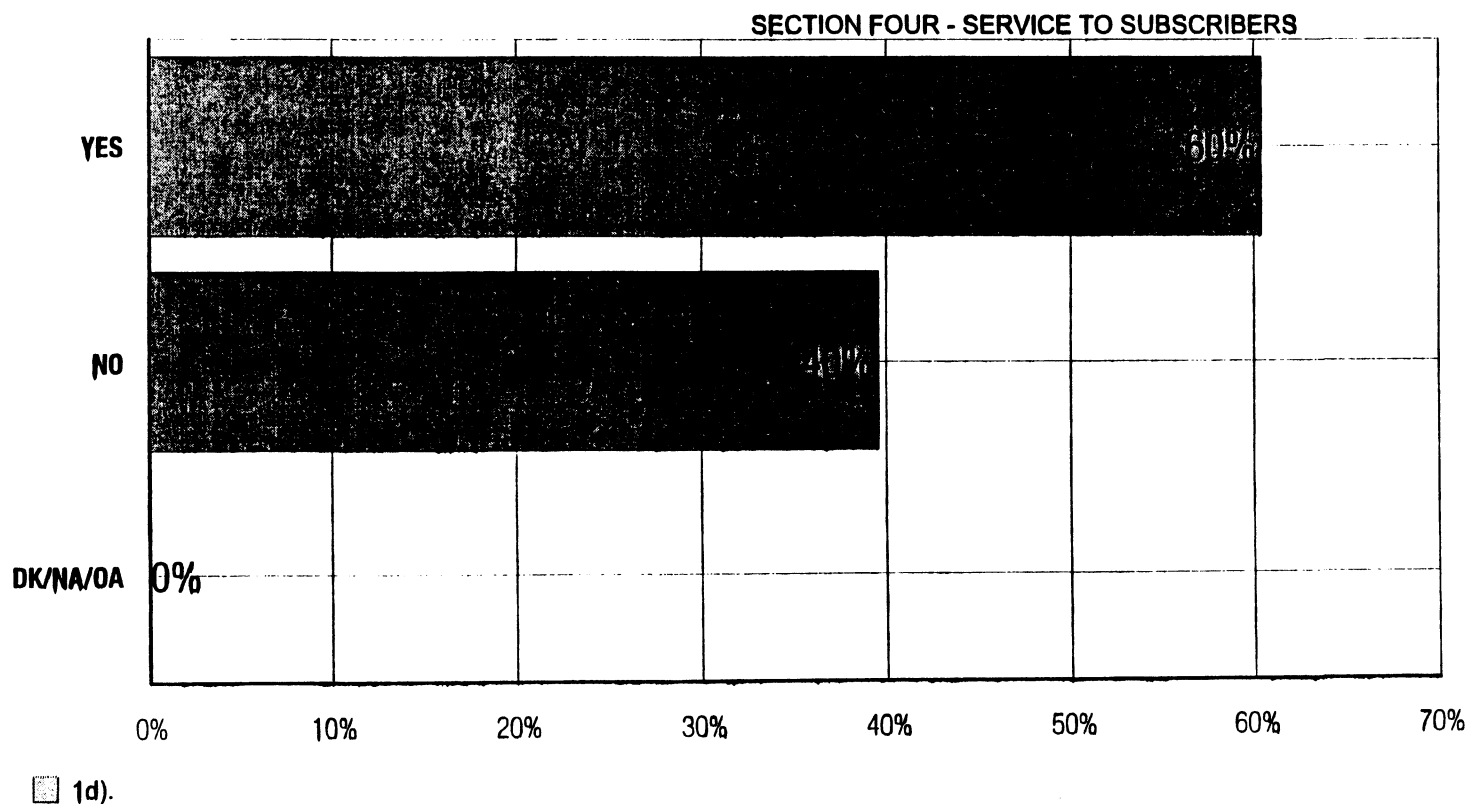
2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

Was your question or problem resolved?



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

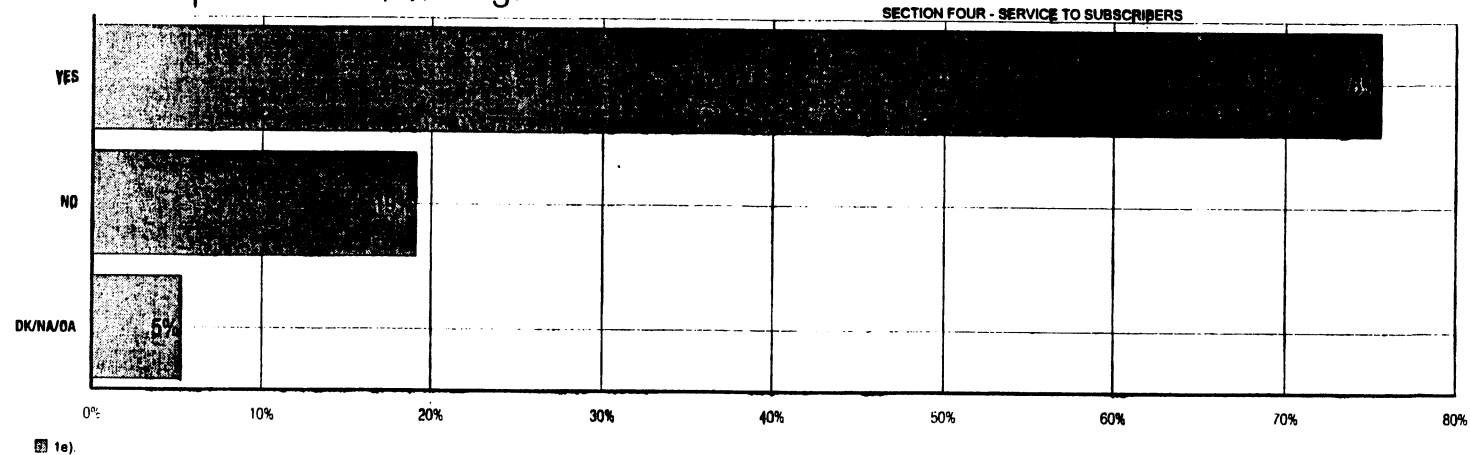
Have you ever visited the local Comcast Office?



2013 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

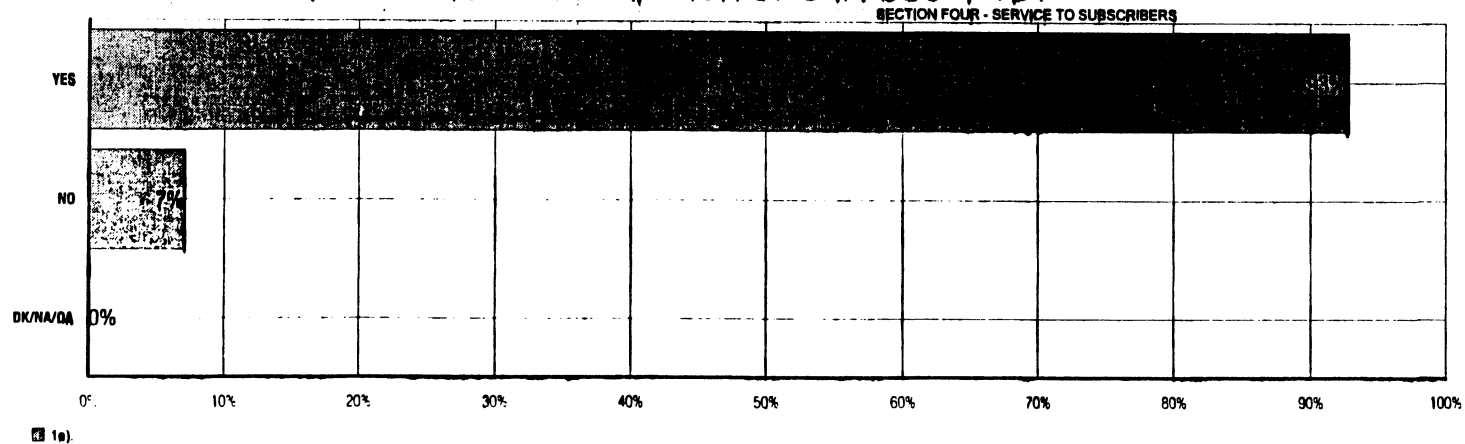
Were you satisfied with the quality of service you received?

*All respondents answering.



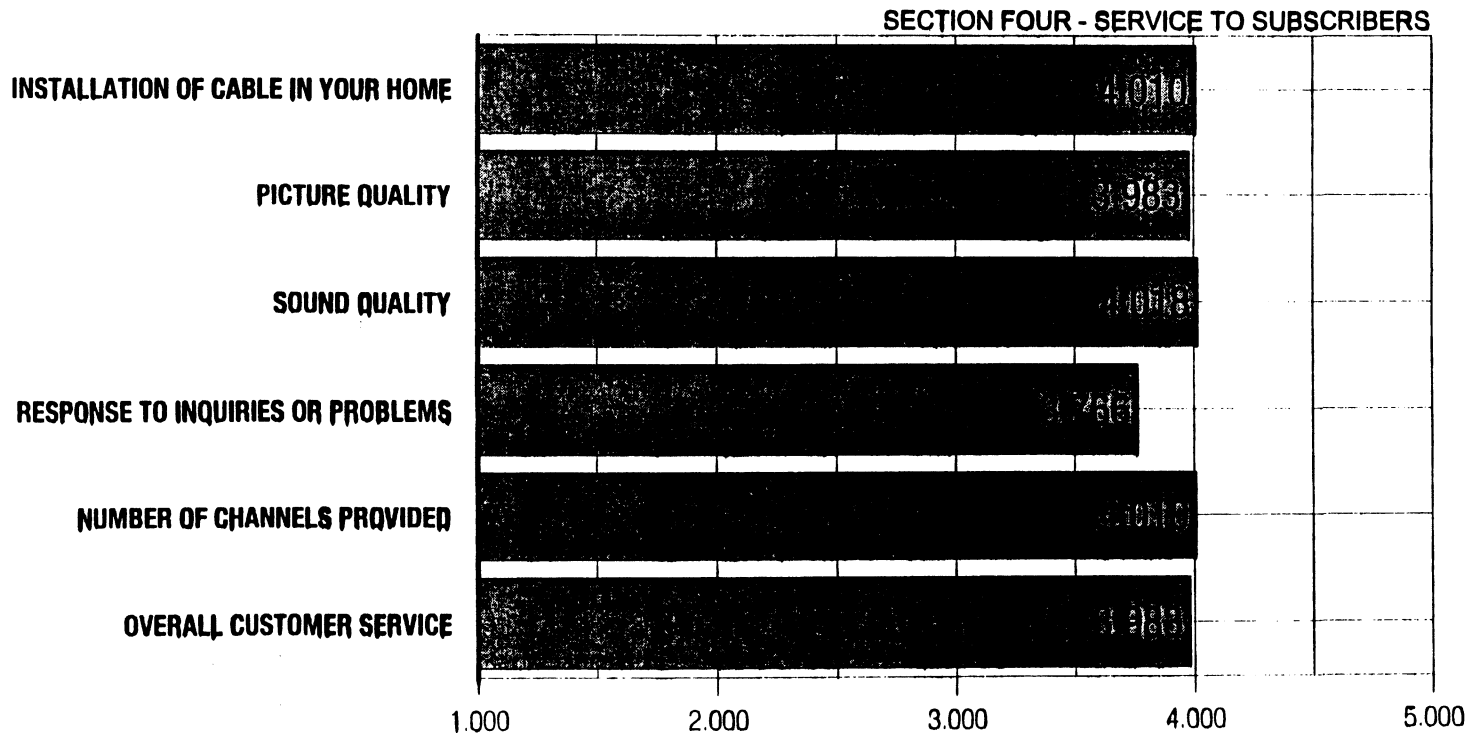
Were you satisfied with the quality of service you received?

**** PARSED TO THE 490 ACTUAL VISITORS IN Sec 4 1D.



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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.

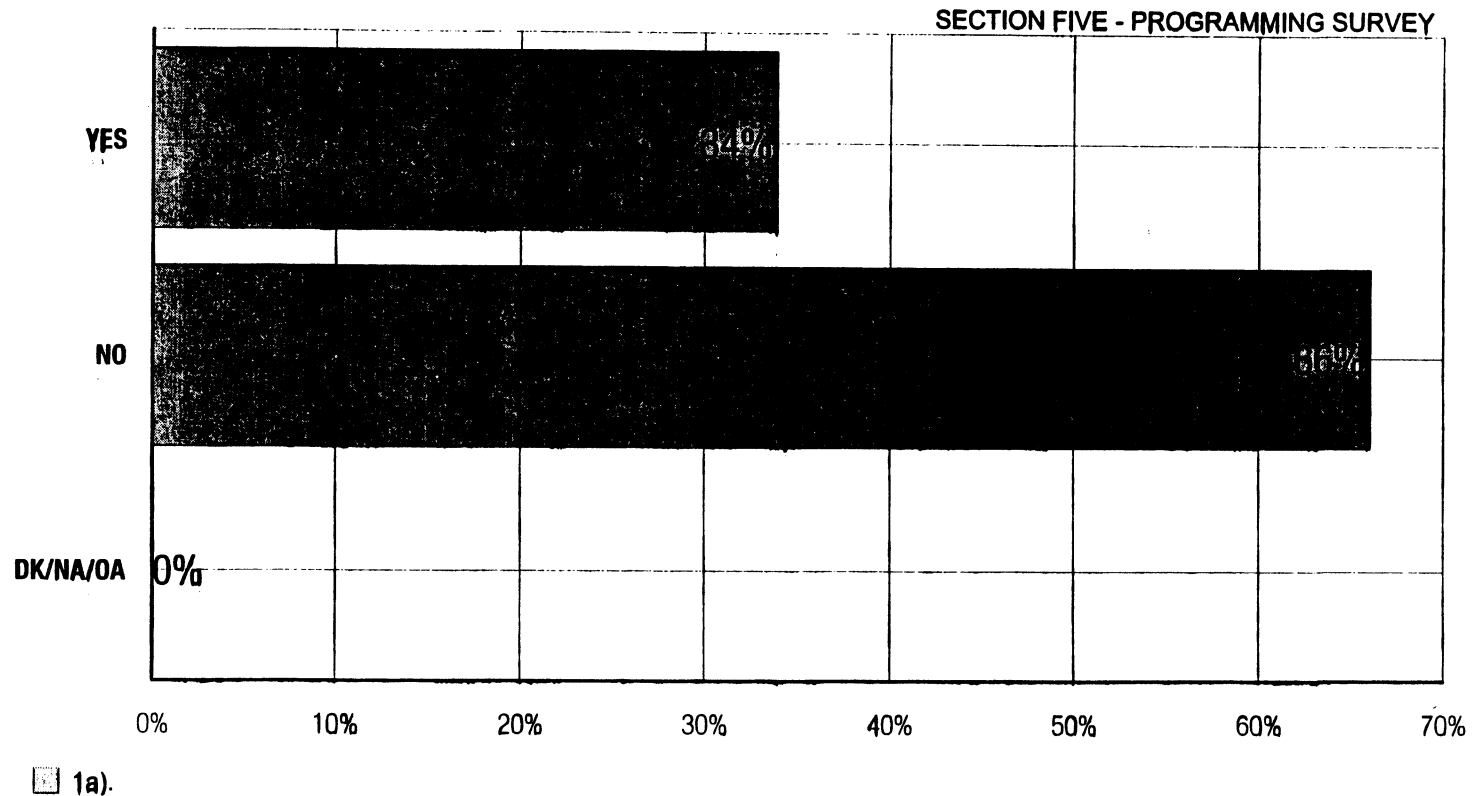


2).



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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

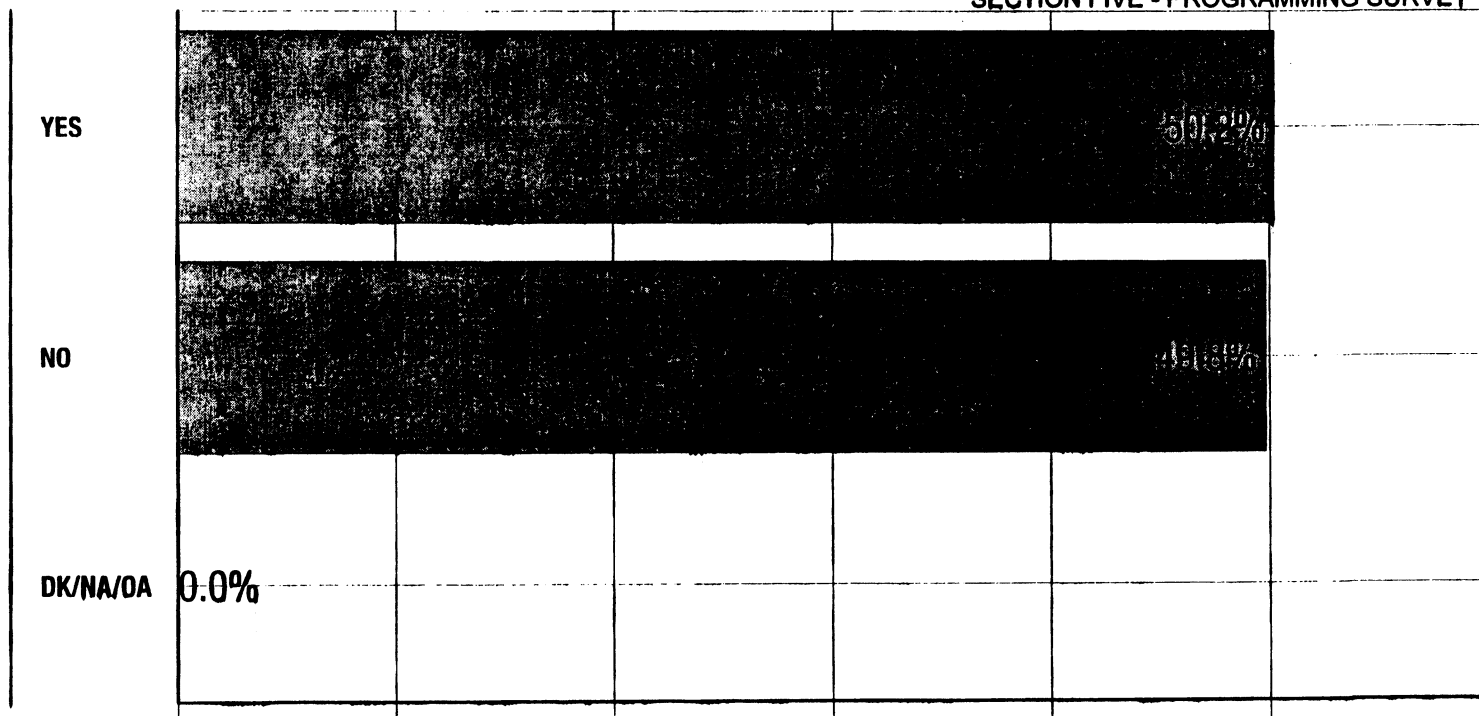
Channel	Requests	Channel	Requests	Channel	Requests	Channel	Requests
Oxygen	20	Lifetime 2	3	Al Jazeera	1	Sunday Ticket	1
Travel	15	Lifetime Movies	3	Archaeology	1	Style	1
BBC	14	MTV 2	3	BET Movies	1	TRIO	1
Christian/Religious	12	Sundance	3	Baseball	1	Tech	1
HBO	11	Westerns	3	Basketball	1	Tvland	1
Do It Yourself Shows	10	Animal	2	Bravo	1	Yes Network	1
More Movies	10	Children's Channels	2	CNN	1		
Showtime	9	Civile	2	Cinemax	1		
WGN	9	Classic Movies	2	Classic Country Music	1		
ESPN Classic	8	EWTN	2	Comedy	1		
Sports	8	Educational	2	Conservative Shows	1		
Hallmark	6	Fine Arts	2	DBC	1		
Biography	5	Fine Living	2	Disney	1		
ENC	5	Fox	2	Evolution	1		
More Music	5	Game Shows	2	Foreign News	1		
Discovery Channels	4	Independent Films	2	Gardening	1		
Football	4	Lifetime Romance	2	Goodlife Network	1		
History	4	Pay Per View	2	High Definition	1		
Home Improvement	4	Philippino	2	IFC	1		
National Geographic	4	Physical Disabilities	2	Japanese Channel	1		
Spanish More Channels	4	Soaps	2	Latin Ballroom Dancing	1		
Starz	4	TBN	2	MTV	1		
BET Jazz	3	TMC	2	Mystery Channel	1		
Baltimore 11	3	Tennis	2	NBA	1		
C-SPAN 3	3	Trinity	2	On Demand	1		
Collage Sports	3	TV Asia	2	Ovation	1		
Cooking	3	Z	2	Playboy	1		
Foreign Language	3	A & E	1	Science Fiction	1		
Foreign Sports	3	Adult Entertainment	1	Shopping Networks	1		



2003 Comcast Cable Television Subscriber Survey - Alexandria, Virginia

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

SECTION FIVE - PROGRAMMING SURVEY



1c).





Alexandria TeleSurvey

Comcast. *Cable Television Subscriber Survey*

Q7 Recommendations for 2004

The 2003 TeleSurvey was based on earlier annual surveys done in Alexandria for the same or similar purposes. In surveys going forward, Q7 recommends a refinement to questions 1d and 1e in Section Four.

Status Quo...

SECTION FOUR – SERVICE TO SUBSCRIBERS

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

[1] Yes

[2] No

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

[1] Yes

[2] No

Based on this writing, Q7 believes only "Yes" answers in question 1d should be asked question 1e. In the 2003 version of the presentation we display graphs that represent all respondents, and just those that answered "Yes" to 1d for clarity.