

City of Alexandria, Virginia

MEMORANDUM

22
11-27-01

DATE: NOVEMBER 16, 2001

TO: THE HONORABLE MAYOR AND MEMBERS OF CITY COUNCIL

FROM: PHILIP SUNDERLAND, CITY MANAGER *PS*

SUBJECT: 2001 COMCAST CABLE COMMUNICATIONS, INC. ANNUAL
SUBSCRIBER SURVEY REPORT

ISSUE: Receipt of the 2001 Comcast Cable Communications, Inc. (Comcast) Annual Subscriber Survey Report (Attachment 1).

RECOMMENDATION: That City Council receive the 2001 Annual Subscriber Survey Report from Comcast Cable Communications, Inc.

The Commission on Information Technology, at its November 12, 2001, meeting reviewed the results of the Comcast 2001 Subscriber Survey report, accepted the staff analysis and voted unanimously to approve the docket memorandum as drafted.

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 2001 cable subscriber survey was administered via telephone to 829 Alexandria cable subscribers, compared to 802 in 2000. The survey was conducted locally by the Comcast Telemarketing Department located in Arlington, Virginia, and independent temporary staff hired by the Comcast Marketing Department tabulated the results.

At Councilwoman Joyce Woodson's request, the Alexandria Commission on Information Technology revised the Cable Television Subscriber Survey form to streamline the 2001 survey and eliminate redundancy in some of the questions. There were no substantive changes to the content of the questions.

This year's survey showed subscribers continue to have a high level of satisfaction with the quality of service offered by Comcast in 2001. The number of cable subscribers who reported watching government programming on Channel 11 increased from 152 in 2000 to 309 in 2001. However, subsequent survey questions, described later in this document, reveal a larger viewing audience than this number implies. Highlights of the 2001 survey findings follow.

- **Survey Sampling Procedure:**

Comcast's Telemarketing staff interviewed cable television subscribers during July and August 2001. The respondents were randomly selected from the Comcast Cable billing database of approximately 48,677 Alexandria cable customers. This year, Comcast experienced more difficulty in getting subscribers to respond to the survey than in past year, which significantly increased the amount of time devoted to their telemarketing staff spent administering the survey. Marie Schuler, Comcast Director of Government and Community Affairs, has 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 ninety-five percent of the time.

- **Cable Subscriber Survey Results:**

- Overall subscriber awareness of the availability of community (Channel 10), educational (Channels 19, 79 and 80), and governmental (Channel 11) channels continued to decline from 77 percent in 2000 to 61 percent in 2001. Staff believes, based on telephone calls to the Office, that this decrease is due, in part, to the number of new residents who have moved into the City during the past year.
- In 2001, 37 percent (303 of 829) of the respondents reported watching Channel 10/Comcast Cable TV (Alexandria Community Channel), a decrease from last year's 42 percent (337 of 802). Respondents who indicated that they watched Channel 10 programming expressed general interest in the following:
 - ▶ Comcast's Community Bulletin Board - 52 percent (158 of 303), up from 26 percent (88 of 337) in 2000;
 - ▶ Local High School Sports - 45 percent (135 of 303), up from 20 percent (67 of 337) in 2000;
 - ▶ Civic/Informational Shows - 57 percent (172 of 303), up from 33 percent (111 of 337) in 2000;
 - ▶ Entertainment Shows - 81 percent (244 of 303), up from 52 percent (175 of 337) in 2000;
 - ▶ Local Current Events - 77 percent (233 of 303), up from 54 percent (182 of 337) in 2000.
- With respect to Channel 11/Government Access Programming, 38 percent (309 of 824) of respondents indicated they watched Channel 11 programming, up from 19

percent (152 of 802) in 2000, of those:

- ▶ 27 percent (217 of 806) had watched a City Council meeting, down from 32 percent (257 of 802) in 2000;
 - ▶ 16 percent (127 of 807) watched a Saturday City Council public hearing, down from 18 percent (144 of 802) in 2000;
 - ▶ 14 percent (113 of 805) watched a Planning Commission meeting, down from 15 percent (120 of 802) in 2000;
 - ▶ 13 percent (101 of 805) watched a Board of Zoning Appeals meeting, down from 14 percent in (112 of 802) 2000;
 - ▶ 11 percent (91 of 803) watched a Board of Architectural Review - Old and Historic District meeting, down from 12 percent (96 of 802) in 2000;
 - ▶ 10 percent (79 of 804) watched a Board of Architectural Review - Parker-Gray District meeting, up from 7 percent (56 of 802) in 2000;
 - ▶ 16 percent (130 of 805) watched an Alexandria School Board meeting (Note: 13 percent of the respondents said they had children who attended Alexandria Public Schools), compared to last year when 14 percent (112 of 802) had watched a School Board meeting with 8 percent having children in the public schools; and
 - ▶ 16 percent indicated they watched Alexandria Public School programming.
- Staff attributes the reduction in Channel 11 viewers to the fact that there were no controversial Citywide issues that galvanized the entire community.
- When polled, subscriber interest in programming that highlights City services, programs and/or projects, dropped to 20 percent (167 of 829) down from 33 percent (265 of 802) in 2000.
- Of the 415 subscribers who handled their cable tv problems via telephone, the majority reported that Comcast's customer service personnel response was timely (66 percent, or 285 of 430, which is down from 83 percent in 2000) and courteous (76 percent, or 328 of 430, which is down from 91 percent in 2000). Subscriber problems were resolved and/or questions answered by Comcast staff in 70 percent of the cases (302 of 429 respondents, which is down from 80 percent of the respondents in 2000).

- Fewer respondents visited Comcast's Van Dorn Street office in 2001, 36 percent (289 of 815) compared to 40 percent in 2000. According to Ms. Schuler, the primary reason for visiting the facility remains bill payment. Since last year's survey, additional payments methods such as credit card payments over the phone have been added, which may explain why fewer subscribers visited Comcast's administrative office.

- Subscriber satisfaction levels with regard to the cable system remain high. 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 - 3.6, down from 2000's result of 4.2;
 - ▶ Picture quality - 4.1, down from 2000's result of 4.3;
 - ▶ Sound quality - 4.1, down from 2000's result of 4.3;
 - ▶ Response to inquiries - 3.6, down from 4.0 in 2000;
 - ▶ Number of channels - 4.1, up from 2000's 4.0; and
 - ▶ Overall customer satisfaction - 3.8, which is down from 2000's result of 4.1.

- This year, 191 subscribers indicated they would like to receive additional channels, compared to 321 in 2000, but only 10 percent (85 of 784) said they would be willing to pay more if Comcast added the channels, which was down from 48 percent in 2000. Staff believes that this number will continue to decrease as the overall number of channels offered by Comcast continue to increase. This year, respondents indicated their primary reasons for subscribing to cable tv is more channels (29.5 percent) followed by better reception (26.2 percent). Sports, the most popular reason for subscribing to cable tv in 2000, dropped to 12.2 percent in 2000.

- To assess the accessibility of Comcast and its equipment for subscribers with disabilities, five questions were posed to survey respondents. Only 4 percent (36 of 812) reported a person in the household having a hearing or vision disability, and 3 percent (24 of 783) reported a mobile, manual or dexterity impairment. Of the 36 subscribers who reported a person in the household with a disability, 15 indicated problems in their ability to access and/or change channels and six noted problems in their ability to discuss bills with Comcast. Fourteen 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.

FISCAL IMPACT: None.

STAFF: Rose Williams Boyd, Director of Citizen Assistance

ATTACHMENT: Comcast Cable Communications 2001 Annual Cable Television
Subscriber Survey Report and Survey Form



2001 ANNUAL REPORT

CUSTOMER OPINION SURVEY

AUGUST 30, 2001

Customer Opinion Survey

The phone calls for the Customer Opinion Survey were begun July 2, 2001 and ended on August 28, 2001. We found the following:

- Customers were generally unwilling to participate in the survey. We were able to collect data on 829 consumers.
- Data will be skewed on Section Two The surveyors indicated that quite a few customers answered No, to the questions, "Do you watch channel 11 programming?" but when asked about specific programs i.e. the City Council Meetings, School Board Meetings etc., they answered Yes.

2001 COMCAST CABLE TELEVISION SUBSCRIBER SURVEY

SECTION ONE - BACKGROUND INFORMATION

	<u>COUNT</u>	<u>PERCENT</u>
1. Major reason you subscribe to cable television. (Multiple responses allowed)		
-More Channels	513	29.5%
-Movies	247	14.2%
-Better Reception	455	26.2%
-Premium Services	217	12.5%
-Sports	212	12.2%
-Other	95	5.5%
	1,739	100.0%
Total	1,739	100.0%

SECTION TWO - ACCESS CHANNELS

1. Previously aware of the five access channels?		
Yes	504	61.0%
No	322	39.0%
	826	100.0%
2. Do you watch channel 11 programming?		
Yes	309	37.5%
No	515	62.5%
	824	100.0%
2a. Ever watched an Alexandria City Council Meeting?		
Yes	217	26.9%
No	589	73.1%
	806	100.0%
2b. Ever watched a Saturday Public Hearing?		
Yes	127	15.7%
No	680	84.3%
	807	100.0%
2c. Ever watched a Planning Commission Hearing?		
Yes	113	14.0%
No	692	86.0%
	805	100.0%

8

2d. Ever watched a Board of Zoning Appeals Meeting?		
Yes	101	12.5%
No	704	87.5%
	<u>805</u>	<u>100.0%</u>

2e. Ever watched a Board of Architectural Review - Old and Historic District Meeting?		
Yes	91	11.3%
No	712	88.7%
	<u>803</u>	<u>100.0%</u>

2f. Ever watched a Board of Architectural Review - Parker Gray District Meeting?		
Yes	79	9.8%
No	725	90.2%
	<u>804</u>	<u>100.0%</u>

2g. Ever watched a School Board Meeting?		
Yes	130	16.1%
No	675	83.9%
	<u>805</u>	<u>100.0%</u>

3. Interested in specific programming highlighting City services, programs, and/or projects?		
Yes	167	20.1%
No	662	79.9%
	<u>829</u>	<u>100.0%</u>

4a. Ever watched the telecourses sponsored by NOVA?		
Yes	146	17.6%
No	682	82.4%
	<u>828</u>	<u>100.0%</u>

4b. Ever watched the telecourses sponsored by George Mason?		
Yes	144	17.4%
No	685	82.6%
	<u>829</u>	<u>100.0%</u>

4c. Ever watched Alexandria Public School programming?		
Yes	131	15.8%
No	698	84.2%
	<u>829</u>	<u>100.0%</u>

4d. Do you presently have children enrolled in the Alexandria Public School System?		
Yes	105	12.7%
No	724	87.3%
	<u>829</u>	<u>100.0%</u>

4e. Ever watched instructional programming on WNTV-53/Channel 59?		
Yes	124	15.0%
No	702	85.0%
	<u>826</u>	<u>100.0%</u>

SECTION THREE - COMCAST COMMUNITY TELEVISION CHANNEL 10

1. Ever watched the programming on Channel 10?		
Yes	303	36.6%
No	526	63.4%
	<u>829</u>	<u>100.0%</u>

2. Ever watched the Community Bulletin Board on Channel 10?		
Yes	158	19.5%
No	652	80.5%
	<u>810</u>	<u>100.0%</u>

3. Interested in any of the following currently shown on Channel 10?		
Local high school sports		
Yes	135	16.1%
No	702	83.9%
	<u>837</u>	<u>100.0%</u>

Civic/Informational Shows

Yes	172	20.8%
No	655	79.2%
	<u>827</u>	<u>100.0%</u>

Entertainment Shows

Yes	244	29.5%
No	584	70.5%
	<u>828</u>	<u>100.0%</u>

Current Local Events

Yes	233	28.3%
No	590	71.7%
	<u>823</u>	<u>100.0%</u>

3a. Biggest obstacle to watching programming on PEG channels.		
-Technical quality of programs	129	14.6%
-Lack of interest in topics	438	49.7%
-Lack of info about when programming is on	199	22.6%
-Other	116	13.2%
	<u>882</u>	<u>100.0%</u>

3b. Ever considered producing a show on Channel 10?		
Yes	88	10.7%
No	736	89.3%
	<u>824</u>	<u>100.0%</u>

3c. Are you aware that Comcast conducts Community Programming Volunteer classes?		
Yes	123	14.7%
No	712	85.3%
	<u>835</u>	<u>100.0%</u>

3d. Interested in taking such a class?		
Yes	89	10.9%
No	730	89.1%
	<u>819</u>	<u>100.0%</u>

SECTION FOUR - SERVICE TO SUBSCRIBERS

1. Ever called the Cable Company for any reason?		
Yes	415	50.4%
No	409	49.6%
	<u>824</u>	<u>100.0%</u>

1a. Was your call answered within a reasonable period of time?		
Yes	285	66.3%
No	145	33.7%
	<u>430</u>	<u>100.0%</u>

1b. Was the person with whom you spoke courteous?		
Yes	328	76.3%
No	102	23.7%
	<u>430</u>	<u>100.0%</u>

1c. Was your question or problem resolved?		
Yes	302	70.4%
No	127	29.6%
	<u>429</u>	<u>100.0%</u>

1d. Ever visited the Comcast office?		
Yes	289	35.5%
No	526	64.5%
	<u>815</u>	<u>100.0%</u>

2a. Satisfied with the installation of cable in your home?
(1=extremely dissatisfied, 5=extremely satisfied)

1	57	7.0%
2	82	10.1%
3	209	25.8%
4	246	30.3%
5	217	26.8%
	<u>811</u>	<u>100.0%</u>

2b. Satisfied with the picture quality?

1	29	3.6%
2	33	4.1%
3	142	17.5%
4	250	30.9%
5	356	44.0%
	<u>810</u>	<u>100.0%</u>

2c. Satisfied with the sound quality?

1	22	2.7%
2	54	6.6%
3	126	15.5%
4	235	28.9%
5	376	46.2%
	<u>813</u>	<u>100.0%</u>

2d. Satisfied with response to inquiries and/or problems?

1	72	9.1%
2	58	7.3%
3	206	26.0%
4	240	30.3%
5	217	27.4%
	<u>793</u>	<u>100.0%</u>

2e. Satisfied with number of channels provided?

1	21	2.6%
2	39	4.8%
3	142	17.5%
4	266	32.8%
5	342	42.2%
	<u>810</u>	<u>100.0%</u>

2f. Satisfied with overall customer service?

1	39	4.8%
2	69	8.5%
3	175	21.6%
4	291	35.8%
5	238	29.3%
	<u>812</u>	<u>100.0%</u>

SECTION FIVE - PROGRAMMING SURVEY

1a. Any channels you would like to see added?		
Yes	191	23.5%
No	622	76.5%
Total	<u>813</u>	<u>100.0%</u>

1b. If Comcast added the channels would you be willing to pay more?		
Yes	85	10.8%
No	699	89.2%
	<u>784</u>	<u>100.0%</u>

SECTION SIX - ACCESSIBILITY SURVEY

1a. Any persons in household with hearing or vision disabilities?		
Yes	36	4.4%
No	776	95.6%
	<u>812</u>	<u>100.0%</u>

1b. Any persons with mobile, manual, or dexterity impairments?		
Yes	24	3.1%
No	759	96.9%
	<u>783</u>	<u>100.0%</u>

1c. Has this affected their ability to access/change channels?		
Yes	15	34.1%
No	29	65.9%
	<u>44</u>	<u>100.0%</u>

1d. Has this affected their ability to discuss a bill with Comcast?		
Yes	6	14.0%
No	37	86.0%
	<u>43</u>	<u>100.0%</u>

1e. Has this affected their ability to find our what programming is on cable?		
Yes	14	35.0%
No	26	65.0%
	<u>40</u>	<u>100.0%</u>