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STUDY OF RESIDENTIAL CABLE TELEVISION
RELATED COMMUNITY NEEDS AND INTERESTS IN THE
CITY OF BALTIMORE, MARYLAND

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CABLE TELEVISION RESIDENTIAL
SUBSCRIBER/NON-SUBSCRIBER RANDOM SAMPLE
TELEPHONE SURVEY MARKUP

RESIDENTIAL COMMUNITY NEEDS ASSESSMENT

RESIDENTIAL TELEPHONE SURVEY

Introduction

As part of cable television franchise renewal proceedings for the City of Baltimore (“City” or “Baltimore”) franchise area, the City conducted a random telephone survey of Baltimore residents that were Comcast cable television subscribers and non-subscribers to document needs and interests related to Comcast cable television service.

The findings are based on telephone interviews conducted with a random sampling of 600¹ franchise area residents during June 2015. Of those interviewed, 300 were Comcast cable television subscribers and 300 were not. Statisticians have created a confidence rating in field survey research based on sample size. A sample size of 600 randomly sampled residents provides for a margin of error of ± 4 percent. In other words, if this study were to be replicated among another random sample of Baltimore franchise area residents, one can feel confident that these same findings would be repeated within ± 4 percentage points of the scores reported in this study.

Interviews with Comcast cable subscribers lasted, on average, twelve minutes. The instruments used during field research were specifically designed to examine several areas of Comcast cable television service. These included, but are not limited to:

- Respondents’ familiarity and experiences with Comcast.
- Reasons non-subscribers do not subscribe to Comcast cable television service or stopped subscribing to Comcast.
- Amount of the average monthly cable bill (all services and fees).
- Type of cable television package subscribed to by respondents.
- Other services subscribed to with Comcast (telephone and Xfinity broadband).
- General level of satisfaction with Comcast cable television service.
- Suggestions on how to improve the services provided by Comcast.
- List of specific channels with poor picture quality or poor audio quality.
- Ratings of communication and service experiences with Comcast, including telephone-based customer service and billing services provided by the company.
- The number of cable outages and subscriber experiences with restoration of services.
- Awareness and opinions of government (CharmTV), education and public access programming currently offered on the cable system and future interest in local programming. Non-subscribers were also asked about their interest in receiving local access programming.
- Quality of the picture and sound of local access programming and evaluation of the programming’s informational and entertainment value.
- Interest in receiving a local public safety access channel
- Ability to view access programming in HD and via the On Demand feature of the Comcast cable television system.

¹ A symbol of N will be used periodically throughout this report to denote total responses.

Research Methodology

A contracted telephone research firm, Issues and Answers, Inc., conducted telephone interviews using randomly drawn landline and cellular telephone numbers. Issues and Answers has more than 40 years of combined experience in social science research using telephone survey methodology and operates four call centers around the country. Calls were placed during a variety of times of day, during weekdays and on weekends, to ensure that all sets of lifestyles were represented in the data collected. Issues and Answers utilized trained interviewers and a continuous call back procedure to ensure the reliability and validity of the data collected. Telephone numbers were identified using random digital dialing from Baltimore area landline and cell phone numbers. Continuous callbacks were made to numbers without answers and to numbers with answering machines or voice mail so that these numbers were not removed from the pool of potential respondents.

The survey instrument was designed by CBG Communications and Dr. Constance Book with consultation with, assistance from, and approval of, representatives of the City of Baltimore.

BALTIMORE, MARYLAND
CABLE TELEVISION SUBSCRIBER/NON-SUBSCRIBER SURVEY
(N=600) (Landline Sample 70%, Mobile Sample 30%)

INTRODUCTION: Hello, this is _____. The City of Baltimore is gathering information from local residents about cable television service, whether you subscribe to Comcast cable or not. Comcast is seeking a renewal of its franchise with the City. Your responses are voluntary. You will not be identified and will only be reported as part of a larger group.

Would you be willing to answer questions about cable television service in Baltimore? **(ALL CAPS ARE INSTRUCTIONS TO THE INTERVIEWER)**

QUALIFIER:

Do you make or share equally in the decision as to whether your household subscribes to cable television?

YES (N=600) NO
100%

(Could I speak to the person in your household who does make or participate equally in that decision?)

ASK EVERYONE

1. You must be 18 years or older to complete the survey, what is your age? (Enter age).
[Note: Also enter responses that are age descriptions such as “very old” as “refused/other”]
(N=600)

<18 - TERM
refused /other - **CONTINUE**

Age Range=18-95 Years old
Mean Age=56.92 Years old
Mode=50 Years Old

2. Do you live within the City limits? (N=600)
a. Yes 100%
b. No - Terminate
c. Refuse - Terminate

3. Does your household currently subscribe to Comcast cable television?

1. YES → **GO TO Q7** Subscriber quota 50% (N=300)
2. NO → **CONTINUE** Non-subscriber quota 50% (N=300)
3. Refused - term

ASK ONLY NON-SUBSCRIBERS Q4, Q5 AND Q6

4. Have you **ever** subscribed to Comcast cable television service in Baltimore?

- | | |
|---|---------------------------------|
| 1. YES → (GO TO Q6)
56% (N=168) | 2. NO → CONTINUE
44% (N=132) |
|---|---------------------------------|

5. (IF NO TO Q4) For what reasons have you **never** subscribed to Comcast cable TV in your community? (DO NOT READ CATEGORIES. PROBE AND CLARIFY FULLY, AS NEEDED. RECORD UP TO 3 INITIAL RESPONSES **BUT DO NOT PROMPT FOR THEM**) (N=132)

	<u>First Response</u>
a. Not available	6%
b. Cost	36%
c. Verizon Subscriber	2%
d. Satellite Subscriber (Dish, DirectTV, etc.)	16%
e. Don't Want/Don't Watch TV/No time to watch TV	14%
f. Unfavorable view of the Cable Company	2%
g. I use the Internet instead of watching TV via cable	1%
h. Prefer to watch free over-the-air TV channels	5%
i. Other, specify (N=26)	20%

6. (IF YES TO Q4) Why did you **stop subscribing** to Comcast cable television service? (DO NOT READ CATEGORIES. PROBE AND CLARIFY FULLY. RECORD UP TO 3 INITIAL RESPONSES **BUT DO NOT PROMPT FOR THREE.**) (N=168)

	<u>First Response</u>
a. Not Available Anymore	1%
b. Cost	59%
c. Verizon Subscriber	0%
d. Satellite Subscriber (Dish, DirectTV, etc.)	5%
e. Don't watch anymore/Didn't watch it	2%
f. I started using the Internet to watch TV	2%
g. Service Issue	10%
h. Programming Issue	3%
i. Billing issues/problems	4%
j. I rely on free, over-the-air television	1%
k. Other, BUILD LIST	13%

NON SUBSCRIBERS SKIP TO Q25

THE FOLLOWING QUESTIONS ARE FOR SUBSCRIBERS ONLY (THOSE WHO ANSWERED “YES” TO Q3.)

7. (IF YES TO Q3) How many years have you had Comcast cable television service at your current address?

_____ YEARS
 Range=0-50 Years
 Mean=11.59 Years
 Mode=10 Years

8. Which of the following levels of cable television service do you subscribe to? (N=300)

- | | |
|--|------------|
| 1. Limited Basic Service, which has about 10+ channels | 21% |
| 2. Digital Economy, which has about 45+ channels. | 17% |
| 3. Digital Starter TV service, which includes about 140+ channels. | 12% |
| 4. Digital Preferred service, which has more than 220+ channels, or a higher tier of service | 37% |
| 5. Don't Know/Not Sure | 12% (N=35) |
| 6. Other, Specify
Bundle, Premium Channels, HD Channels | 2% (N=6) |

9. My next few questions are about Comcast. Overall, how satisfied are you with your current cable television service? (READ LIST)

- | | |
|---|-----|
| 1. Very Satisfied → GO TO Q.11 | 17% |
| 2. Satisfied} → GO TO Q.11 | 51% |
| 3. Dissatisfied} → CONTINUE | 21% |
| 4. Very Dissatisfied} → CONTINUE | 10% |
| 5. (DO NOT READ) Don't Know → GO TO Q.11 | 2% |

10. For what reason are you not “Very Satisfied or Satisfied” -- that is, what could Comcast do **better** to make you **consider** a more positive rating? (DO NOT READ. ATTEMPT TO PLACE RESPONSE WITHIN ESTABLISHED CATEGORY OR ADD OTHER. **CODE TOP 3 RESPONSES IN ORDER MENTIONED. DO NOT PROMPT**) (N=92)

- | | <u>First Response</u> |
|--|-----------------------|
| a. Want a la carte channel selection
(let me pick my channels/packages) | 1% |
| b. More HD channels | 1% |
| c. Lower rates | 55% |
| d. Need more competition/monopoly | 3% |
| e. Outages/interrupted service | 17% |
| f. Programming issues | 4% |
| g. Other, BUILD LIST | 17% |

11. Now I’m going to read you a list of cable TV **service features**. For each one I read, please rate your cable television service as either: Very Satisfied, Satisfied, Dissatisfied or Very Dissatisfied. The first one is . . . (INSERT ITEM, STARTING AT “a”) Overall, how satisfied are you with (ITEM), Very Satisfied, Satisfied, Dissatisfied, or Very Dissatisfied? (ASK FOR EACH ITEM, REPEATING SCALE AS NEEDED). (N=300)

	Cable Television Feature (N=300)	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied	Don’t Know
a	The picture quality	28%	63%	5%	1%	2%
b	The sound level consistency across channels	21%	64%	11%	2%	2%
c	The ability of Comcast to explain and address billing questions and problems	12%	53%	21%	8%	5%
d	Communications regarding rates and programming changes	9%	48%	25%	13%	5%

12. Have you had a service call in the past year?
 YES 49% (N=148) NO 51% (N=152) (**GO TO Q14**)

13. Now I’m going to read you a list of cable TV **service issues**. For each one I read, please rate your cable television service issue as either: Very Satisfied, Satisfied, Dissatisfied or Very Dissatisfied. The first one is . . . (INSERT ITEM, STARTING AT “a”) Overall, how satisfied were you with (ITEM), Very Satisfied, Satisfied, Dissatisfied, or Very Dissatisfied? (ASK FOR EACH ITEM, REPEATING SCALE AS NEEDED). (N=148)

Service Issues (N=148)	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied	Don't Know/ Not Applicable
a. The available times for service	12%	68%	14%	3%	4%
b. The arrival time of the service technician	21%	57%	13%	2%	6%
c. The ability of the technician to resolve the service issue	20%	58%	13%	7%	3%

14. Now, I’m going to ask you about any phone contacts you may have had with Comcast. During the **past year**, have you **called** Comcast for any reason other than installation? (N=300)

YES 56% (N=169) NO 42% (N=126) (**GO TO Q19**)
 DON’T REMEMBER (DON’T READ) 2% (N=5) (**GO TO Q19**)

- 15. For what reason(s) have you called Comcast during the past year? (N=169)
(See full category list at end of mark-up)

Top 5 Reasons

Outage, No Picture, Service Down
 Billing question, Did not understand bill
 Bill was wrong
 Box not working, Box problems
 Connection down to the Internet

- 16. When you called Comcast’s office, did you get a busy signal before you got through?

YES 14% (N=23) NO 77% (N=130) DON’T REMEMBER 10% (N=16)

- 17. Was your call answered, including any time you were left on hold, within 30 seconds by a Comcast customer service representative? (N=169)

YES 37% (N=63) NO 55% (N=93) DON’T REMEMBER 8% (N=13)

- 18. If your call to Comcast was to report a problem or request service, how long after your contact did Comcast begin working on the problem? (N=169)

Would you say...

- a. The same day reported 45%
- b. The next business day 17%
- c. Days later 17%
- d. About a week. 8%
- e. About a month. 1%
- f. Problem never resolved. 7%
- g. DON’T RECALL/KNOW (DON’T READ) 5%

- 19. My next few questions are about cable television signal outages. During the past year, have you ever lost your entire cable signal for a period of more than 24-hours while you still had electricity?

YES 20% (N=60) NO 76% (N=228) (**GO TO Q22**)
 DON’T RECALL/KNOW 4% (N=12) (**GO TO Q22**)

- 20. Can you estimate how many times in the past year you've lost your entire cable signal for a period of more than 24 hours? (N=60) _____ NUMBER OF SERVICE OUTAGES IN PAST YEAR

Range of number of outages (1 to 48); Mean=3.37 Outages; Mode=1 Outage

21. How satisfied were you with the length of time it took Comcast to restore your service? Would you say you were . . . (READ LIST) (N=60)

- 1. Very Satisfied 5%
- 2. Satisfied 43%
- 3. Dissatisfied 40%
- 4. Very Dissatisfied 12%
- 5. (DO NOT READ) Don't Know 0%

22. In the **past year**, have you had any significant problems with picture clarity or reception? (N=300)

- YES 30% (N=89)
- NO 67% (N=203) (*GO TO Q25*)
- DON'T RECALL/KNOW (DON'T READ) 3% (N=8) (*GO TO Q25*)

23. On which channels do you most frequently experience picture clarity or reception problems? (See full list at end of survey mark-up)

First Mentions

All Channels

Local Channels

Channels 12, 15, 13, 11

24. How satisfied were you with the length of time it took Comcast to resolve your reception problem? Would you say you were . . . (READ LIST) (N=89)

- 1. Very Satisfied 7%
- 2. Satisfied 54%
- 3. Dissatisfied 24%
- 4. Very Dissatisfied 15%
- 5. (DO NOT READ) Don't Know 1%

ASK EVERYONE

25. The cable company currently sets aside a portion of its channels to be used by the organizations and people within Baltimore to produce local community programming. These channels are currently used by government, educational and public access television producers.

Are you aware of these channels? (N=600)

Report Awareness of Local Access Channels	Total	Among Subscribers	Among Non-Subscribers
Yes	55%	63%	46%
No	45%	37%	54%

YES (*SUBSCRIBERS GO TO Q27, NON-SUBS CONTINUE*)

NO (*SUBSCRIBERS, GO TO Q35; NON-SUBS, CONTINUE*)

ASK Q26 ONLY TO NON-SUBSCRIBERS

26. Do you have an interest in being able to receive local government, education, and public access programming? (N=300)

YES 39% (N=117) NO 61% (N=183)

ALL NON-SUBSCRIBERS GO TO Q36

ASK ALL SUBSCRIBERS WHO ARE AWARE (ANSWERED YES TO Q25)

27. How often do you watch Baltimore local government and community programming that appears on local channel 25, CharmTV? Examples of programming include government meetings and conferences, Tasty Travels, Out & About, Born in Baltimore, and more. (READ LIST) (N=189)

- a. 5 hours or more per week. *CONTINUE* 10%
- b. Less than 5 hours per week, but on a weekly basis. *CONTINUE* 21%
- c. Once or twice per month. *CONTINUE* 20%
- d. Once or twice a year. (*GO TO Q29*) 13%
- e. Never (*GO TO Q29*) 34%
- f. Don't Know (*GO TO Q29*) 2%

28. I want you to consider the government programming you've seen on, CharmTV (Channel 25). Please rate the following areas on a scale of excellent, good, fair or poor. (N=96)

	Government Access CharmTV	Excellent	Good	Fair	Poor	Don't Know
a.	CharmTV picture quality	21%	62%	10%	3%	4%
b.	CharmTV sound quality	20%	62%	9%	6%	3%
c.	CharmTV programming's informational value.	18%	63%	14%	1%	5%

29. How often do you watch Channel 75, Community Media of Baltimore City. Citizens of Baltimore produce programming for this channel and include shows like Democracy Now! Human Rights Doc, The Whole Truth and Metro Showcase? (READ LIST) (N=189)

- a. 5 hours or more per week. *CONTINUE* 6%
- b. Less than 5 hours per week, but on a weekly basis. *CONTINUE* 9%
- c. Once or twice per month. *CONTINUE* 9%
- d. Once or twice a year. (*GO TO Q31*) 11%
- e. Never (*GO TO Q31*) 63%
- f. Don't Know (*GO TO Q31*) 2%

30. Now consider the quality of programs on Channel 75. The rating categories again are excellent, good, fair or poor. (N=45)

	Channel 75, CMBC-TV	Excellent	Good	Fair	Poor	Don't Know
a.	Channel 75's picture quality	22%	53%	13%	9%	2%
b.	Channel 75's sound quality	18%	51%	20%	9%	2%
c.	Channel 75's overall value of programming.	20%	53%	22%	2%	2%

31. How often do you watch locally produced, Educational Access programming that appears on Education Channel 77, the Baltimore City Public Schools channel? Education Channel 77 features videos produced by students, staff and partners. Examples of programming include The Great Kids Up Close Show, The Baltimore Pioneers Show, Beyond the Classroom, In the Spotlight (Dance, Arts and other student performances) and The City Schools Cooking Show. Programming also includes student-produced content from external partners — Wide Angle Youth Media, The Griots Eye and students in the Mayor's Youth Works program. (N=189)

(READ LIST)

- a. 5 hours or more per week. *CONTINUE* 6%
- b. Less than 5 hours per week, but on a weekly basis. *CONTINUE* 9%
- c. Once or twice per month. *CONTINUE* 10%
- d. Once or twice a year. (*GO TO Q33*) 7%
- e. Never (*GO TO Q33*) 66%
- f. Don't Know (*GO TO Q33*) 3%

32. Now consider the quality of programs on Education Channel 77. The rating categories again are excellent, good, fair or poor. (N=45)

	Education Channel 77	Excellent	Good	Fair	Poor	Don't Know
a.	Education Channel 77's picture quality	27%	49%	22%	2%	--
b.	Education Channel 77's sound quality	20%	58%	20%	2%	--
c.	Education Channel 77's overall value of programming.	22%	56%	18%	--	4%

ALL SUBSCRIBERS WHO DO NOT VIEW ANY ACCESS CHANNEL AT LEAST ONCE A MONTH GO TO Q35.

33. Considering the local programs that appear on the cable system, including local access channels, I'm wondering if there are any other types of local programs you have an interest in being able to receive? **OPEN ENDED. CODE UP TO 3 RESPONSES UNLESS RESPONSE IS ONLY NO/NONE/NOTHING, ETC. (DO NOT PROMPT FOR THREE)** (See full list at end of survey mark-up)

Top Mentions Include:

None, Local Sports, Arts programming, Community based programs, School based programs

33a. Considering the local access channels currently provided on the cable system, how valuable would it be to you to have the following programming available on its own access channel: (N=108)

Local Community Programming	Very Valuable	Valuable	Somewhat Valuable	Not at all Valuable	Don't Know/ Not Applicable
Public Safety Programming	30%	37%	18%	13%	3%
Health and Wellness Programming	31%	36%	19%	10%	3%
Arts & Entertainment Programming	22%	47%	23%	7%	1%

34. How valuable would it be to you to be able to receive the programming on Baltimore's local government, educational and public channels in high definition/HD? Would you say it is Very Valuable, Valuable, Somewhat Valuable or Not at all Valuable (SAME AS "NOT VALUABLE")? (N=108)

- a. Very Valuable 22%
- b. Valuable 28%
- c. Somewhat Valuable 20%
- d. Not at all Valuable 28%
- e. Don't know/Refuse 2%

ASK ALL SUBSCRIBERS

35. Regardless of how often you might watch, how important is it that these Baltimore community channels are available to cable subscribers? Would you say it is Very Important, Important, Somewhat Important or Not at all Important (SAME AS “NOT IMPORTANT”)?

- a. Very Important 37%
- b. Important 31%
- c. Somewhat Important 17%
- d. Not at all Important 10%
- e. Don’t know/Refuse 5%

36. How much is your total monthly Comcast bill on average, including all services and fees?
[DNR] Don’t Know

Range of cost (\$9 to \$385)
Mean cost=\$145.11
Mode=\$200

ASK EVERYONE

37. Is there anything else you would like to say about Comcast’s service in your community?
OPEN ENDED. CODE UP TO 3 RESPONSES UNLESS RESPONSE IS ONLY NO/NONE/NOTHING, ETC. USE THE CODE CATEGORY (DO NOT PROMPT FOR THREE) (N=600)

Made Additional Comments	Total (600)	Among Subscribers (300)	Among Non-Subscribers (300)
Yes	33%	39%	27%
No	67%	61%	73%

38. Is there anything else you would like to say about Comcast’s service in your community?

First Response (N=196)

- 1. Rates issue 40%
- 2. Service issue 9%
- 3. Just don’t like the company 5%
- 4. Monopoly/Need Competition 10%
- 5. Satisfied with Cable 5%
- 6. BUILD LIST AS NEEDED 32% (N=62)

Background Questions (N=600)

My last few questions are asked in order to better understand your opinion when considering others like yourself.

39. Do you own or rent your home? OWN RENT REFUSED
 60% 33% 7% (N=43)
40. Do you currently have children under age 18 in your household?
 YES 24% NO 71% REFUSED 5% (N=27)
41. Do you mostly use a cell phone? (READ LIST)
- | | | |
|----|--|-----|
| a. | YES | 47% |
| b. | NO | 28% |
| c. | I don't have a cell phone | 3% |
| d. | I only have a cell phone | 3% |
| e. | I use my cell phone and landline equally | 19% |
42. What is your race or ethnic background? (READ LIST) (N=600)
- | | | |
|----|----------------------------|------------|
| a. | African American/Black | 54% |
| b. | Asian | 1% |
| c. | White | 31% |
| d. | Hispanic/Latino/a | 1% |
| e. | American Indian | 1% |
| f. | Biracial/Multiracial/Other | 3% |
| g. | (Refused) | 10% (N=59) |
43. What is the highest level of education you have had the opportunity to complete? (READ LIST) (N=600)
- | | | |
|----|---------------------------|-----------|
| a. | Some high school or less | 8% |
| b. | High school graduate | 26% |
| c. | Some college/trade school | 23% |
| d. | College/4-year degree | 22% |
| e. | Postgraduate | 14% |
| f. | (Refused) | 7% (N=42) |
44. And which of the following broad categories best describes your total annual household income, before taxes? (READ LIST) (N=600)
- | | | |
|----|--------------------------------|-----|
| 1. | Under \$25,000 | 15% |
| 2. | \$25,000 to less than \$35,000 | 11% |
| 3. | \$35,000 to less than \$50,000 | 12% |

4.	\$50,000 to less than \$75,000	9%
5.	\$75,000 to less than \$100,000	8%
6.	\$100,000 or more	9%
7.	(DO NOT READ) REFUSED/DON'T KNOW	36% (N=218)

45. Gender (by observation)

Male	34%	Female	66%
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