Birmingham Area Cable Board

Community Resident Survey

July 17, 2013

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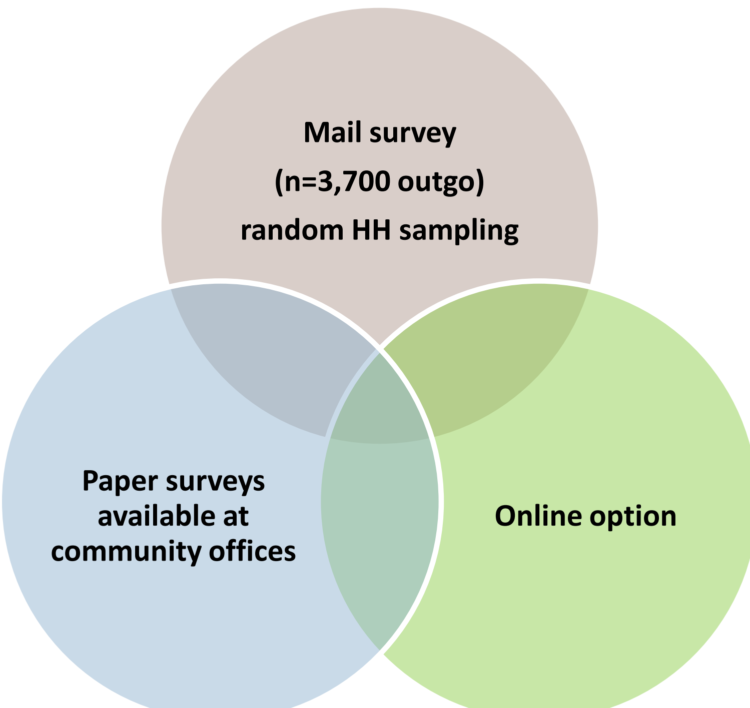
2013…

488 responses

n=420 mail & n=68 online
(+/- 4.4% at 95% confidence)

Hybrid Approach:



86%
Mail

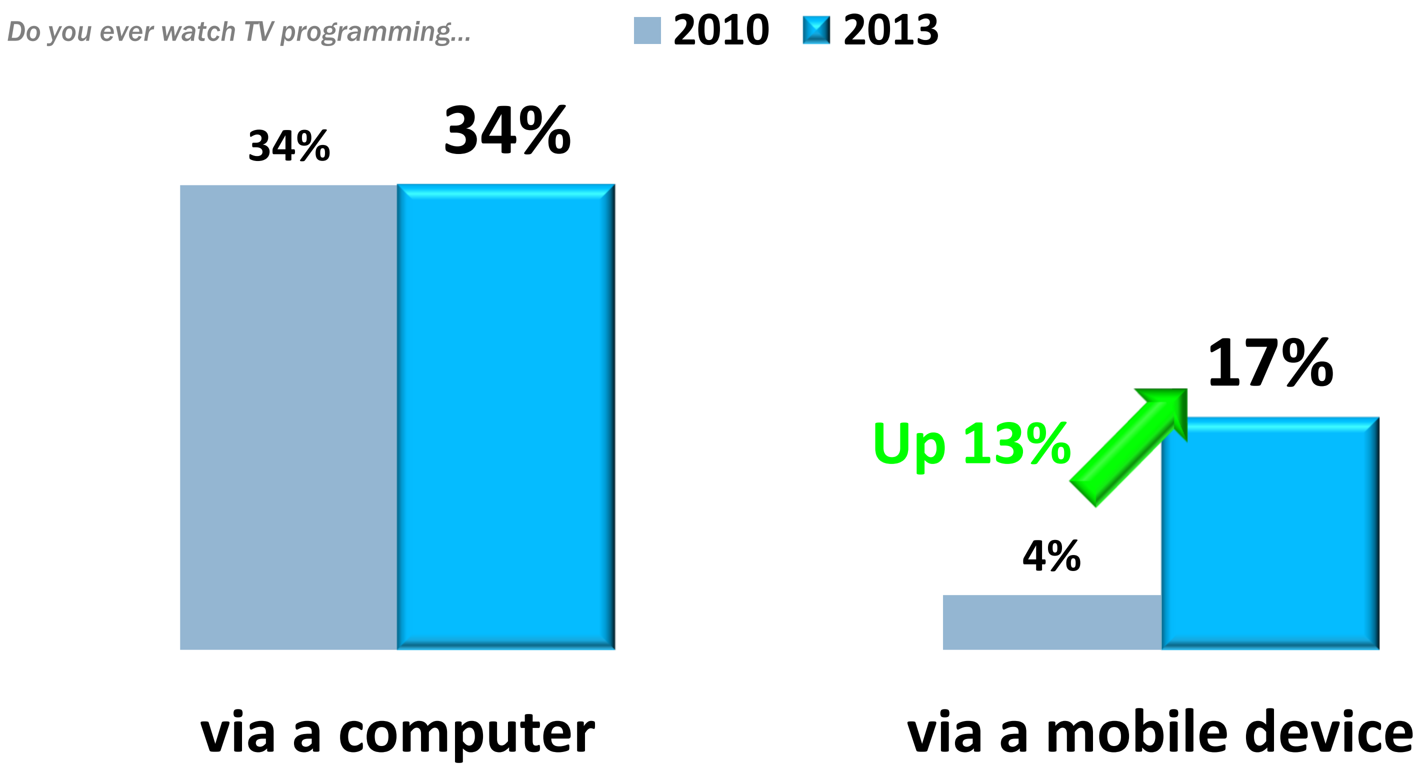
(Compared to 90% in 2010, 93% in 2006)

14%
Online

(Compared to 10% in 2010, 7% in 2006)

2013 KEY FINDINGS

1. **Similar to 2010 and on the rise, watching TV is not limited to a *television* anymore**. Similar to three years ago, 1 in 3 residents say they have watched TV programming via a computer. **Watching TV via a mobile device is on the rise—up to 17% from just 4% in 2010**. While the 44 years and younger residents are more apt to watch TV on a mobile device, all age groups show an increase since 2010.



2013 KEY FINDINGS

2. While **Comcast continues to be the most common provider** for both TV (58%) and Internet access (54%) among residents, **use of Comcast is down** from 2010 (from 74% TV and 60% Internet three years ago).

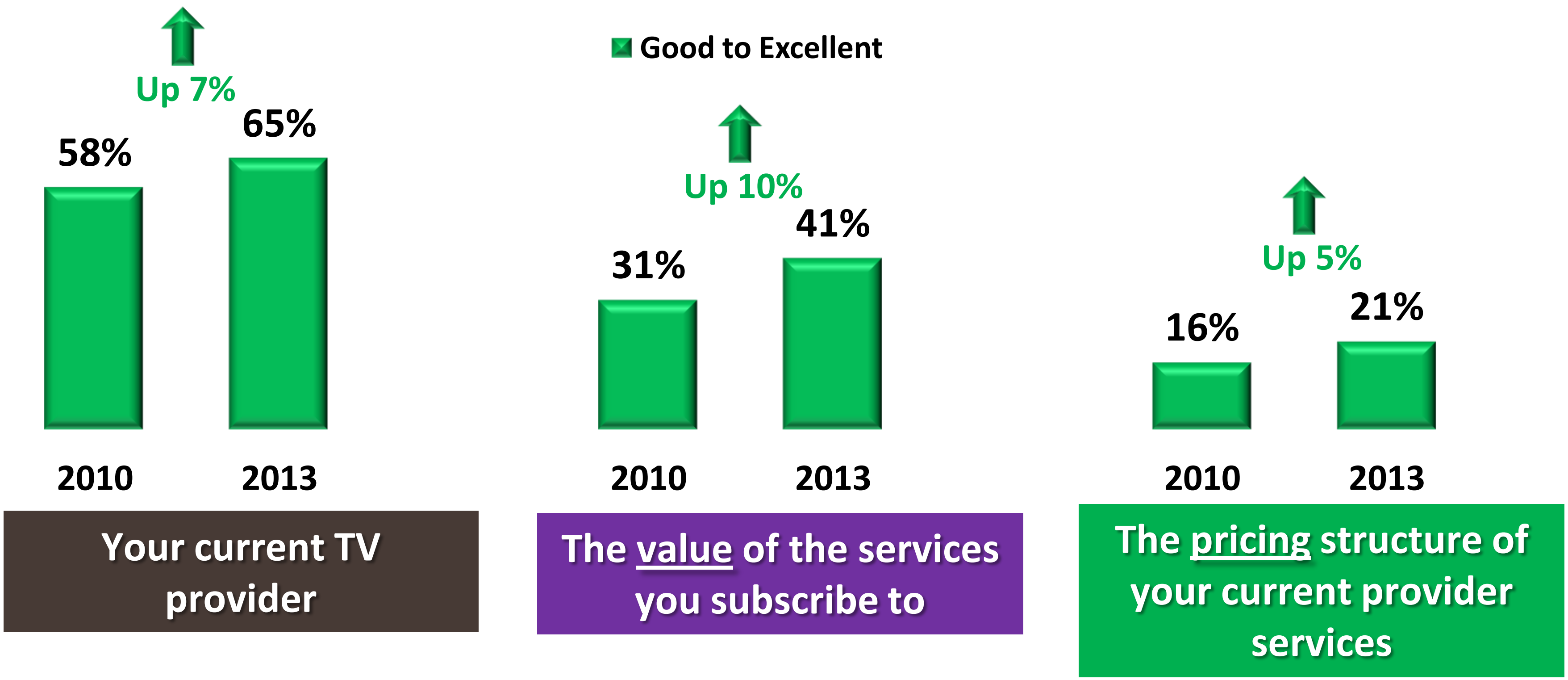
   Use of WOW! has increased (**up to 15%)** taking share away from Comcast with customers in Birmingham (22%) and Beverly Hills (40%). Bingham Farms and Franklin residents continue to be heavy Comcast customers (77% and 72% respectively).

3. Similar to three years ago, **HDTV and "On-Demand" remain the most common 'other' services** residents are currently receiving from their TV provider in 2013 and tend to be more popular among younger age segments. **Residential phone service and DVR have both increased since 2010.**

2013 KEY FINDINGS

4. **A sign of some improvement?** Overall, residents give higher ratings to their providers this year than back in 2010 with **biggest gains in the 'value of services'**.

   The **least favorable ratings continue to be for the pricing structure** of their current provider (2 in 5 rate it poor to very poor).



2013 KEY FINDINGS

5. Of these three primary service providers, **WOW! subscribers give the highest ratings**, followed by AT&T U-Verse users. **Comcast users give the lowest ratings**.

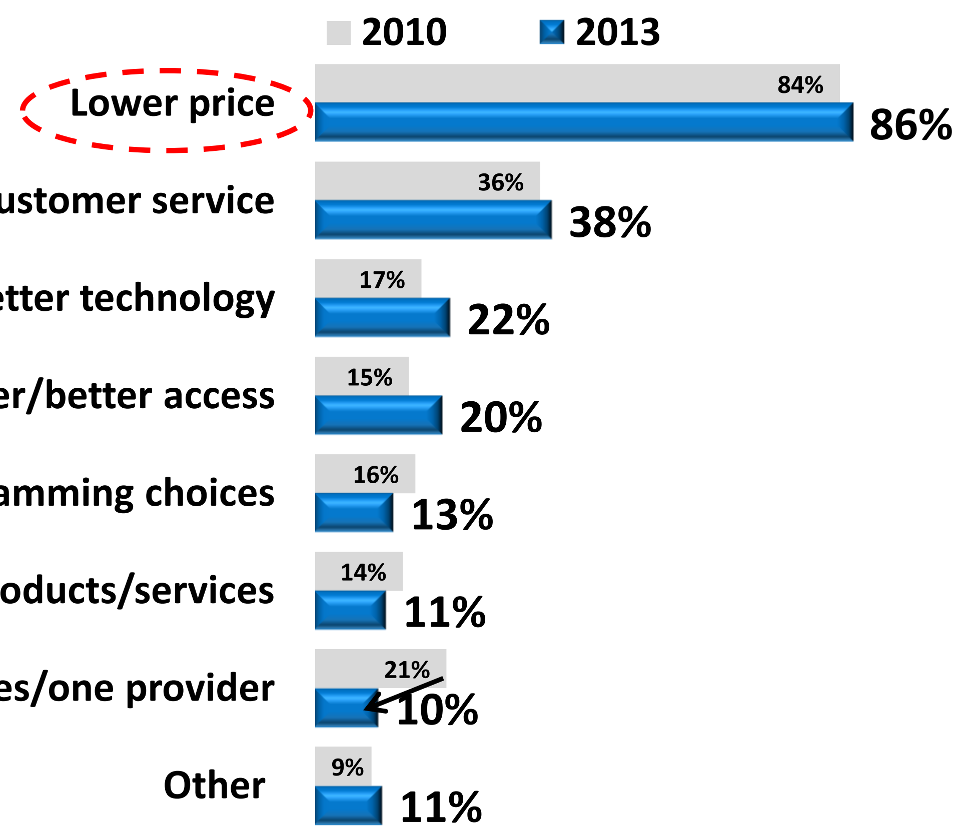
   Residents in **Birmingham and Beverly Hills give higher top box ratings in 2013** than in 2010 (the WOW! impact?).

   Bingham Farms and Franklin provider ratings remain consistent to 2010 with the exception of Franklin residents giving higher 'value' ratings in 2013.

6. Similar to three years ago, **13% say they have <u>switched providers</u> in the past year**. Viewed by community, Birmingham had the largest percentage of residents to switch providers and Bingham Farms had the least.

2013 KEY FINDINGS

7. Compared to 2010, slightly **fewer residents overall are <u>considering a new provider</u>** in the coming year (28% compared to 36% in 2010). Bingham Farms and Franklin residents (heavy Comcast users) are most apt to consider a new provider this year. Among those who are considering switching, the reasons why are **1) a lower price and 2) better customer service** (the same top two reasons back in 2010).



2013 KEY FINDINGS

8. Among those **who are considering switching providers in the coming year, WOW! and AT&T U-Verse are considered most often**. **Consideration for WOW! increased significantly from 2010 (up 40%!).**

   Birmingham, Beverly Hills and Bingham Farms residents are considering WOW! as their first choice while Franklin residents are considering AT&T U-Verse primarily.

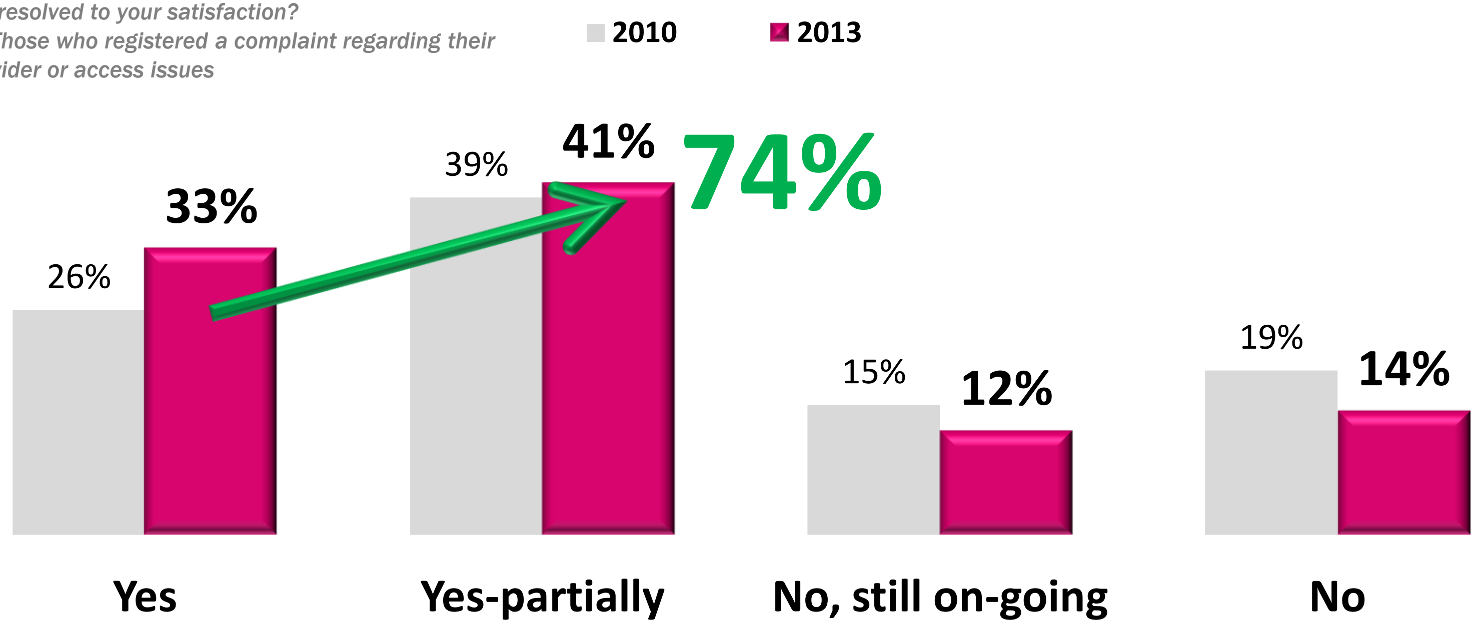
9. Switching to **Internet only TV is not very popular**. Just 6% of residents say they are considering going to Internet only TV, while 24% are undecided and the majority (70%) are not considering it.

2013 KEY FINDINGS

10. **Addressing complaints appears to be getting better**. Overall 1 in 3 residents say their household registered a complaint regarding their TV provider or an access issue (with the majority continuing to register with their **TV provider customer service**). Bingham Farms was the only community to register more complaints than back in 2010.

    An improvement from 2010, nearly three in four say that their complaint was resolved at least partially (up from 65% in 2010).

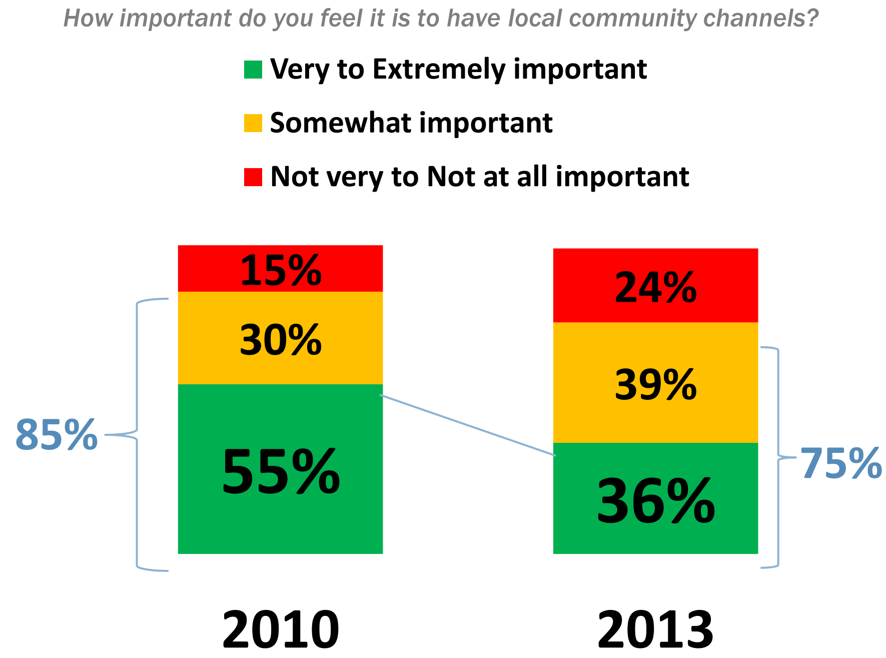
Was it resolved to your satisfaction?
Base: Those who registered a complaint regarding their TV provider or access issues



2013 KEY FINDINGS

11. The **majority (75%) of residents feel that it is *somewhat to extremely important* to have local community channels** (down 10% from 2010).

Households with children are more apt to consider all three PEG Channels to be *very to extremely important* to them compared to households without children.



12. **Awareness is moderate, but use is limited**. Awareness levels for the BACB website (48%), online programming replays (43%) and the Electronic Bulletin Board (42%) haven't changed much from 2010.

Of those aware, **one in three have visited the BACB website**, one in four have watched a replay online and one in five have accessed the Electronic Bulletin Board.

2013 KEY FINDINGS

13. **Awareness for all three PEG channels is high among the four communities and continues to increase slightly** (approx. 8+ in 10 aware).

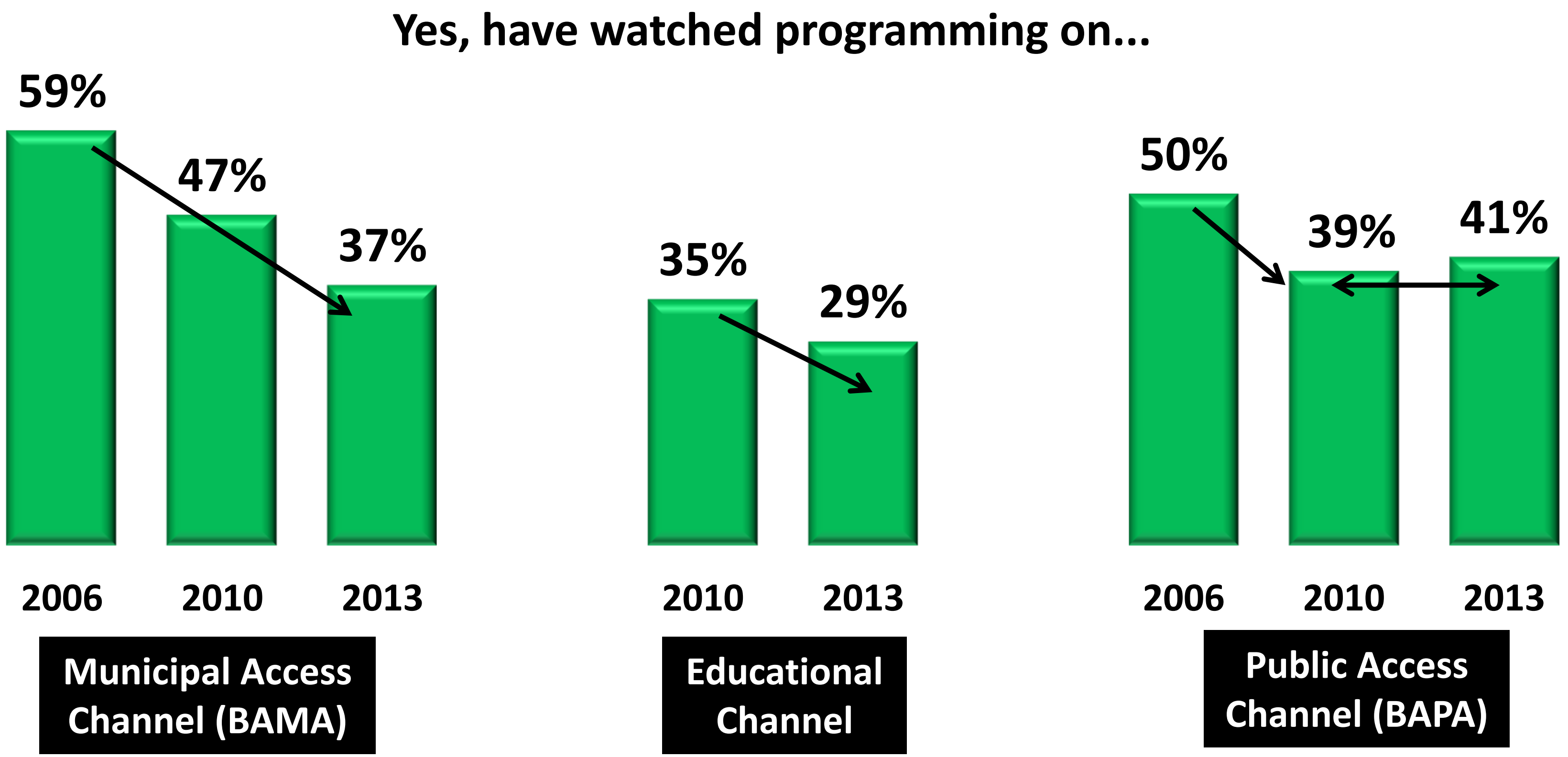
    Awareness for **BAPA (Public Access Channel) increased from 2010 and has the highest awareness of all three channels at 87%,** while 83% of residents are aware of BAMA (Municipal Access Channel) and 79% are aware of the Educational Channel.

14. Similar to three years ago, there **continues to be a gap between awareness and use of the PEG Channels**. While awareness for the PEG channels continues to increase slightly from 2006 and 2010, **viewership is down slightly for both the Municipal and Educational Channels**.

    The BAPA (Public Access) Channel is watched more than the other two Channels in 2013 (in 2010 the most viewed was the BAMA Channel) by two in five residents. Viewership of the Municipal Channel decreased 10% since 2010 (to 37% currently) and the Educational Channel (watched the least) by 6% to 29% in 2013.

2013 KEY FINDINGS

15. ***Since 2006***, viewership of the Municipal & Public Access Channels is decreasing. **Municipal Channel viewing is down more significantly (by 22%) than Public Access Channel viewing** (by 9%) compared to eight years ago. In 2013, **Birmingham residents are more apt** to have watched programming on BAPA and BAMA than the other communities.



2013 KEY FINDINGS

16. Similar to in 2006 and 2010, the **primary way residents find out about programming on PEG is by *channel surfing* (7 in 10).** Use of ***newspapers*** **trends up in 2013,** while tuning-in for specific programs/issues trends down. All PEG channels tend to be **watched just *once in a while***.

17. Trending downward, **just one in four residents *are aware they can create* & produce their own cable TV programs**. Similar to in 2010, just 2% have already done so and 5% are interested.

18. The top three types of **programming watched on BAMA** (Municipal Access Channel) in 2013 are **similar to back in 2010 and 2006.** In 2013, ***Local council & commission meetings*** **garner highest viewing interest on BAMA (Municipal Access Channel),** followed by *Local election programming/local candidate forums* and *Community News and Events*.

19. The top three types of programming watched on the Educational Channel in 2013 are similar to back in 2010. ***Concerts, Guest speakers*** **and *Athletic events*** garner highest viewing interest on the Educational Channel.

20. Similarly, the preferred types of programming on BAPA (Public Access Channel) in 2013 are similar to those in 2010 and 2006. ***Civic events and Educational shows*** garner highest viewing interest on the Public Access Channel, followed by ***Arts or Cooking & Dining*** and ***Musical Presentations.***

THE BIG THINGS IN 2013…

1. Watching TV **via a mobile device is on the rise** —up to 17% from just 4% in 2010.

2. **WOW!** is making positive inroads and taking Comcast market share.

3. WOW! gets **highest provider ratings**, then AT&T U-Verse. Comcast gets lowest ratings.

4. **Pricing** is still the biggest pain point and motivation for switching providers.

5. Switching to **Internet only TV** is not very popular (yet).

6. Even though a large majority (75%) of residents feel that it is important to have local community channels --this is down 10% from 2010. **Households with children** are more apt to consider these PEG Channels important than households without kids.

7. **Channel surfing** continues to be the leading way residents find out about PEG programming.

8. Awareness for PEG Channels continues to increase, but use/viewership is either holding steady (BAPA) or decreasing (BAMA & Educational).

9. Municipal Channel viewing is down more significantly (by 22%) than Public Access Channel viewing (by 9%) compared to eight years ago. The Educational Channel continues to be the least watched.

10. Similar to 2010, the leading suggestion to the Board is to **have more competition**.

Thank you!