



VERMONT

DEPARTMENT OF PUBLIC SERVICE

**Community Needs Assessment Report:
Comcast CPG Renewal
Docket No. 8301**

January 26, 2016

Submitted by:
Vermont Public Service Department

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COMMUNITY NEEDS ASSESSMENT

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Introduction:

In August 2015, Comcast filed a petition for the renewal of its Certificate of Public Good (CPG) to operate a cable television service in Vermont. The Cable Communication Act of 1984 allows cable franchising authorities (in this case the Vermont Public Service Board or PSB) to require cable operators to set aside one or more cable channels for non-commercial, non-profit local programming and to equip and fund these operations. Comcast’s service territories include twenty four Public Access organizations, known in Vermont as Access Management Organizations (“AMOs”).

One obligation of the Department of Public Service (the “Department”) is the completion of a community needs assessment (“CNA”), described in Board Rule 8.231. The focus of the CNA is to report feedback related to Comcast and the AMOs in Vermont. This report describes the methods used to complete the CNA and outlines the results of this process. Transcriptions of individual responses from the focus group meetings and non-scientific survey results are included in this report.

Methodology:

The Department’s Consumer Affairs and Public Information Division (“CAPI”) was primarily responsible for executing two components of the CNA: focus groups and a non-scientific survey. CAPI facilitated fifteen meetings in the fourteen counties where Comcast provides service. The stakeholders invited to focus group meetings were also given the opportunity to respond to a short web-based survey.

Members of the focus groups were asked a series of questions about their local AMOs and public, educational, and governmental (“PEG”) channels, and Comcast. Participants were invited to write responses to questions posted on chart pads followed by a facilitated discussion.

A web based survey was sent to all focus group invitees, including those persons who were unable to attend the meetings. The survey asked six questions and included an opportunity to comment on any issues not addressed by the survey questions.

The Department contracted with the Center for Rural Studies (CRS) to conduct a scientific survey of a representative sample of consumers in Comcast’s service area.

Results:

(1) Focus Groups

The Department conducted a total of fifteen focus group meetings – which included at least one meeting in each county in Vermont (two meetings were held in Chittenden County). A total of 940

people were invited to attend the fifteen focus group meetings. The meetings had a total of 124 attendees.

In general, participants spoke highly of the services provided by the AMOs. Most people in attendance were current Comcast subscribers and viewers of AMO programming. Many had produced programming themselves or worked with students or other groups who had created original programming.

Several members of the focus groups referred to their local AMO as a valuable community partner and expressed great appreciation for programming and services. Below is a list of several examples and common themes that focus group participants identified as benefits that AMOs provide to their communities:

- Opportunities for community members to stay informed through broadcast of public meetings;
- An important resource for citizens with mobility issues and the elderly to remain connected to community;
- Outlet for community members to express creativity;
- Opportunity for students to learn skills;
- Ways to provide free and accessible community trainings;
- Venue for organizations can promote programs and missions;
- Access to local information that isn't available on broadcast channels and increasingly less so in print;
- Opportunities for outreach to increase volunteer base and community support for non-profits;
- Resource for emergency info (Irene);
- Resource for information on local projects (Champlain Bridge, VGS pipeline, VT Yankee decommissioning).

The following is a list of written comments and quotes that Participants made on the value of AMOs in their community. This is not an exhaustive list of all comments made by participants, but the quotes reflect some of the common themes that the Department heard throughout the focus group meetings:

- "Provides a public forum for community interests. Provides training on equipment to enable anyone ability to present their creative and informational ideas to the community;"
- "[I]s very important to residents of the communities they serve. People depend on being able to see public meetings and hold public officials accountable;"
- "Local Access makes the community closer. It reduces isolation by providing information about government, arts events and local news;"
- "(Local AMOs) do an incredible amount to inform, train, and engage the public. They seek to give voice to and assist local governments, non-profits, and citizens. They are enormously important in bringing together people and events across the state;"
- "Trains youth to use technology in ways they can grow, express themselves, contribute to community topics and develop career options and have fun! Encourages them to develop team skills;"
- "Makes it possible for non-profits to tell their story in a compelling way through video."

The Department transcribed all hand written comments received by participants from all meetings into one consolidated document. Those comments and the questions asked by Department representatives

are included in **Attachment A**. The Department also compiled a summary list of participants' oral and discussion responses to various questions that were asked by the Department at the focus group meetings. Those responses are included in **Attachment B**.

The two most common mentions of how the AMOs are utilized is the broadcast and archiving of public meetings and training for students. Other programs commonly mentioned in the focus groups include the following: coverage of local events, worship services, public health, interviews with local people, arts, library programs, and local history.

When asked what additional services they would like the AMOs to provide, many participants expressed that they would like the AMOs to have the capacity to do more of what they already do — coverage of more community meetings and events and the ability to broadcast more live programming from locations that are not currently set up for remote origination. Others spoke of the desire for AMOs to provide local sports coverage, education that would enhance lessons taught in the classroom, and training in job skills or compliance to qualify for state programs. Citizens expressed a desire to view more PEG content on the internet or through a mobile app. Many voiced a desire to be able to view content from other AMOs and for a statewide channel that could feature programming from all areas of the state. People felt that increased marketing by the AMOs and advertisements on commercial channels could bring awareness and support to PEG programming and services.

Participants were also asked to provide feedback on Comcast's service. Facilitators emphasized that we were seeking input on video service and not on the non-regulated services that Comcast provides. Comments on regulated and unregulated aspects of Comcast service are represented in this section. Several consumers said that they feel that Comcast's rates are too high and that they would like the opportunity for *a la carte* options for television. Participants cited varied experience with customer service representatives and technicians. Some said that trying to get assistance from representatives has been frustrating, others had examples of representatives that were very helpful. Feedback about technicians and timeliness of repairs was positive. One person said that "service calls get answered quickly and effectively for residential users."

Participants expressed gratitude for drops and internet connections to schools and other organizations (although they would like to see more) and they feel that the Internet Essentials program is a valuable resource for Vermont families in need. One participant mentioned upgrades and access Comcast provided to a local teen center. Another mentioned sponsorships to an arts organization that were beneficial. Overall, however, people who attended focus groups do not feel that Comcast is integrated in their communities in the way that AMOs are. They would like to see Comcast do more in Vermont communities and promote the AMOs' community based efforts. We heard feedback at every meeting that citizens wished that Comcast service was available to them or neighbors who live in areas where Comcast does not currently serve.

Participants in every meeting said that AMOs would benefit greatly from being able to broadcast in High Definition and from having detailed program listings on Comcast's interactive Program Guide (IPG). People said that HD is a medium that a majority of viewers use to consume programming and not having that option available for PEG programming was a deterrent for viewers. Several attendees stated that most current video recording equipment uses HD and the transfer of the video from HD to Standard Definition ("SD") results in degraded picture and sound. Attendees also stated that some equipment needed to down-convert HD video to SD (which Comcast requires for AMO content) is no longer

manufactured and it is becoming increasingly problematic to replace broken or depreciated equipment. They state that this issue would not be a problem if Comcast distributed AMO content in HD.

Regarding the Interactive Programming Guide (“IPG”), most participants’ opinion is that detailed program listings would bring awareness of the programs to Comcast customers who are not currently aware of the programming available and could result in increased viewership. People also mentioned the increased popularity of Digital Video Recording (DVR) or programming which is difficult without the listings. Many attendees noted that they rely exclusively on the IPG to find television content. Other attendees, however, stated that they were unfamiliar with the IPG and do not use it. However, most attendees felt that more people would view AMO content if it were listed on the IPG.

People also mentioned that they would like to see Comcast make additional Investments to improve equipment. There were also suggestions that AMO programming and services could be advertised on commercial stations.

(2) Non-scientific surveys

The Department conducted an online, non-scientific survey by using the web-based SurveyMonkey® platform. The Department sent a link to the survey page by email to all persons that were invited to the focus group meetings. Results of the non-scientific survey are included as **Attachment C** to this report.

A total of 110 persons responded to the Department’s non-scientific online survey. Of those 110 responses, 83 said that they currently use one or more services offered by the AMO, 23 said they are not current users, 4 respondents skipped this question.

People who responded to the non-scientific survey mentioned similar services and PEG content that were identified at the focus group meetings, which included viewing public meetings, airing public announcements, and producing programing. Many of responses did not offer specific suggestions for how PEGs could improve service to the community, but stated that local AMOs were doing a good job. For example, one respondent said that their organization airs a 30 minute program on Public Access to promote pets that are available for adoption. Responses to a question about feedback from constituents was largely favorable. For example, one response noted “excellent feedback and full support” from constituents on PEG programs. Some responses, however, mentioned issues with video and sound.

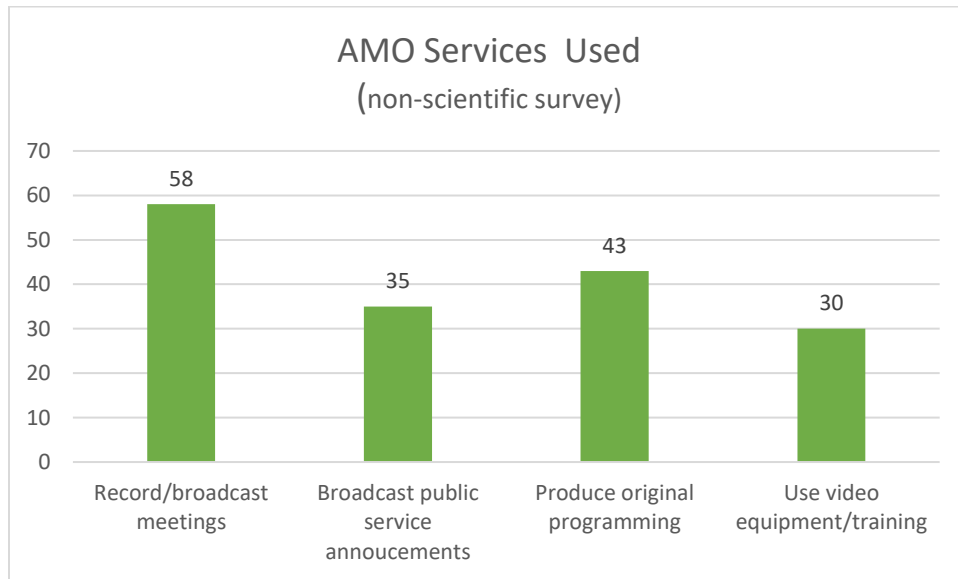
One person’s view of her local AMO is “local people we know and are very willing to be there when we need them.” Another person commented that PEGs could do “a better job of connection the community. Every event in the community should be thinking about placing themselves on PEG TV before and after.” Another response to the question about what PEGs could do to support the community was “[m]ore engagement in community life outside of government coverage so they’re seen as an integral part of community life and not just a place for fringe perspectives.” Another participant commented that he would like to see “[b]etter community outreach and more visibility in the community. They could be actively taping programs rather than waiting for people to come to them.” There were a couple of suggestions for more timely broadcasts of meetings.

There were also several generally favorable comments about the AMOs and PEG programming and their value to communities. One person said “[o]rural region needs to be able to deliver our citizens information without them having to travel long distances. Removing Public Access from our area hurts all but it would certainly put our most vulnerable and stressed individuals at a greater disadvantage”

Another comment was “I would not like to live in a community without Public Access TV.” Another called the local PEG “A great resource and a valuable asset.”

Eighty three (83) people who took the survey said they were current users of AMO programming and services. Twenty four (24) respondents reported that they are not current users.

Seventy two (72) people responded to the question about services that they currently use. Recording and broadcasting meetings was the most common response. Almost half of these respondents use equipment and training.



Participants said that they feel that the PEGs would benefit from additional marketing and promotion through print media, online forums and social media. Several respondents echo the sentiments expressed by focus group members about wanting the IPG and HD available for PEG programming. People also mentioned more financial support, increased bandwidth, and promotion on commercial stations as ways Comcast could support AMOs. In response to the question about Comcast, one respondent noted appreciation for Comcast providing service to schools. Participants commented on high rates and lack of *a la carte* options for video.

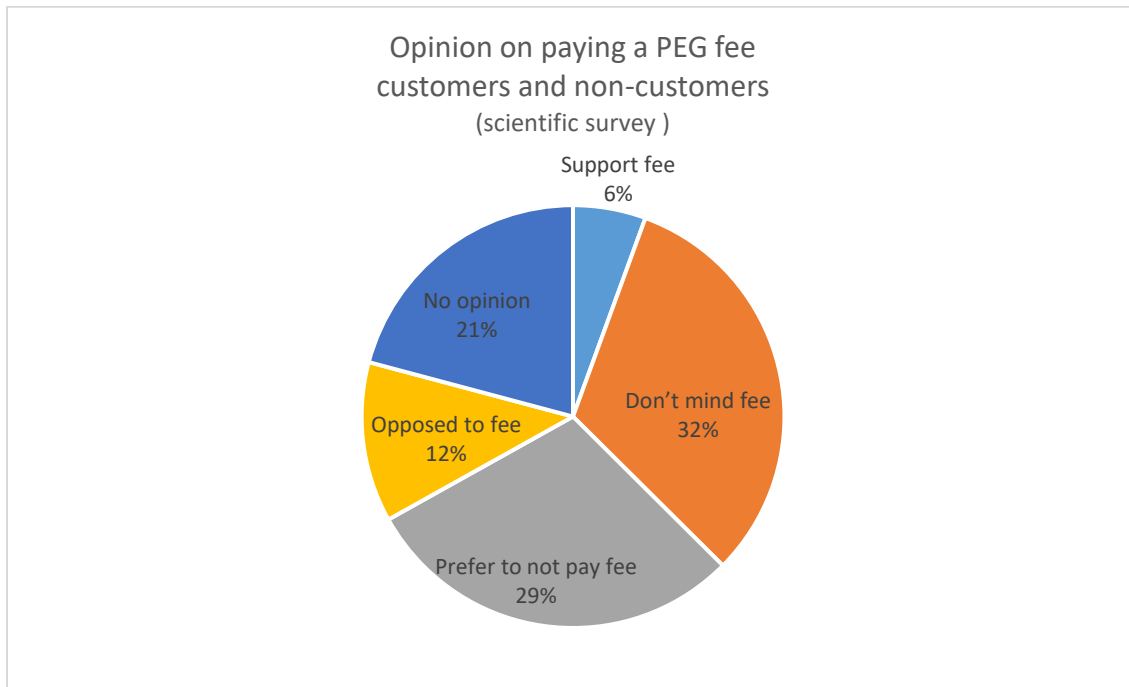
(3) Scientific survey

In conducting the scientific survey, CRS attempted to contact a total of 5,027 household located within Comcast’s service territory by telephone. CRS obtained 399 complete responses to the survey, which resulted in a total of 373 usable responses after weighing the respondents with data from 2010 Census Data. A full report of the scientific survey results is included as **Attachment D**.

Of those surveyed, 165 people are current Comcast subscribers, 204 were not current subscribers (several others responded with “don’t know”). 23.6% of respondents who are not subscribers cited price as the reason that they do not subscribe to Comcast. 11.2% said that they did not subscribe because Comcast was not available in their area. 50.7% of non-subscribers said that they ended their

subscription with Comcast because of price. 15.1% said that they use an internet option (streaming) for video.

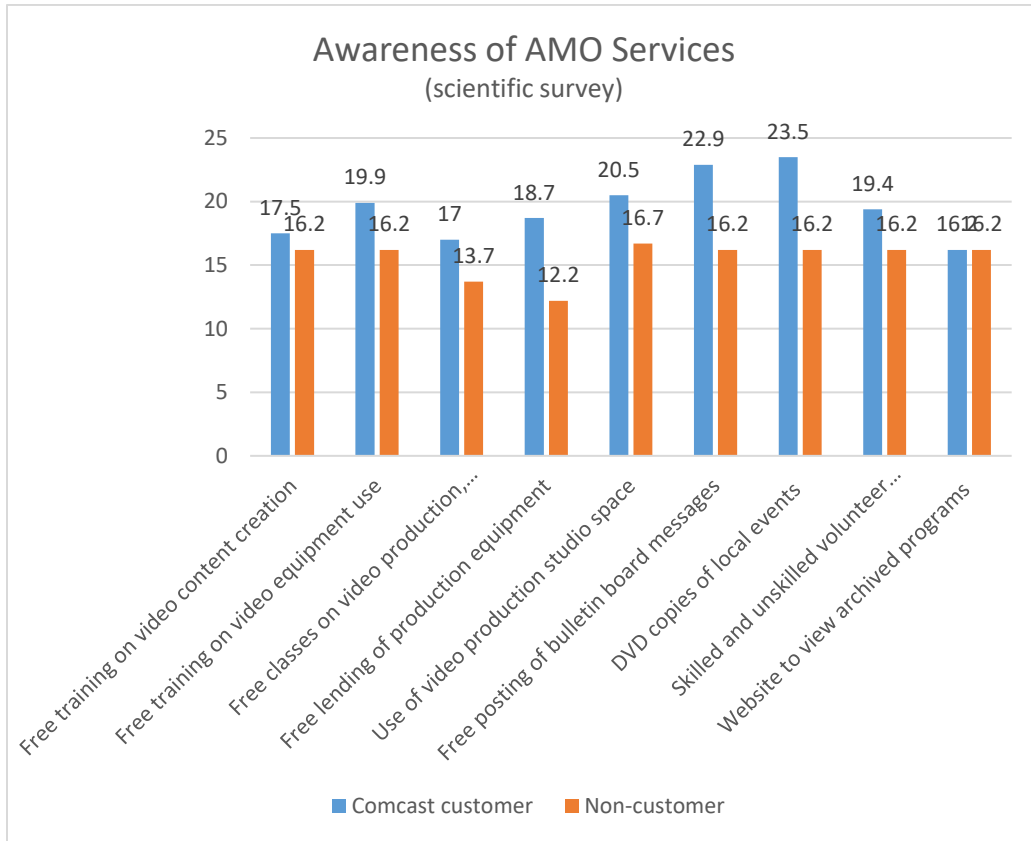
67% of Comcast customers surveyed think that it is important for residents and community organizations to have the opportunity to create and show their own local programs through community access television. 15.8% of participants are aware of the PEG Access Fee included in cable bills, 83.4% were unaware. Few participants had strong feelings about the fee, either favorable or not. The scientific survey was the only place where respondents were asked specific questions about fees for AMO services.



78.5% of current Comcast customers say that they would like the option of seeing Public Access programming on the IPG. In a separate question, people were asked what Comcast could do to make the community more aware of PEG programming in services. The answer with the most responses (50.7%) was to put the schedule on the program guide. However there was not strong support to pay additional fees for that option; 19.4% said "I don't mind paying a fee", 42.8% would prefer not to pay a fee, 29.2% opposed paying a fee.

25.8% of respondents said that Comcast could make the community more aware of PEG programming and services by making the programming available in HD. 35.1% of current Comcast customers said they would like the option to watch PEG programming in HD.

67.9% of current Comcast customers surveyed are aware of PEG programming. Awareness of other services that PEGs offer is less common. Current Comcast customers are slightly more aware of services than non-customers.



(4) Written Comments to the Department

The Department also collected written comments from members of the public as part of its CNA. The overwhelming majority of the comments were made in support of the AMOs and PEG programming. The content of the written comments touched on many of the same issues identified during the focus group meetings and the informal survey, such as inclusion of PEG content on the IPG and distribution of PEG channels in HD. Many written comments also discussed the importance of PEG programming for local communities. All written comments that the Department received are included as **Attachment E**.

Conclusions

Based on the information gathered through the CNA process, the Department believes that Comcast, through its relationships with the AMOs, is meeting the cable related community needs and interests of the communities that it serves. The AMOs are very effective and responsive in collaborating with citizens and organizations in communities that are aware of services available. Even among community members who are not current users, there is support for services that AMOs provide. There appears to be a deficit of awareness in communities about the programming and services that AMOs provide,

which could be addressed with increased marketing and outreach by the AMOs and assistance from Comcast with things like specific program listings, broadcast of PEG programming in high definition, and promotion on commercial channels. There is community support for PEG programming on the Interactive Program Guide, broadcast of PEG programming in HD and increased capacity for remote origination. However, responses from the scientific survey indicate that customers do not want to bear the costs for enhanced AMO services. There is widespread support for Comcast expanding its service area.