



2021 Cable Customer Satisfaction Study



Report of Findings

28 January 2022
Confidential & Proprietary

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Harnessing the power of data to help clients achieve organizational goals.

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Solutions that are customized to provide a personalized approach of understanding organizational, employee, and customer needs allowing for more informed decisions.



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Project Overview

- GreatBlue Research was commissioned by Shrewsbury Electric and Cable Operations (hereinafter “SELCO”) to conduct market research to understand the satisfaction levels of its residential cable television and internet customers.
- The primary goals for this research study were to measure SELCO’s cable performance and perception of current offerings, as well as develop an understanding of customers’ television viewing preferences moving forward.
- In order to service these research goals, GreatBlue employed both a telephone and digital survey methodology to capture the opinions of residential customers living within the SELCO service territory.
- The outcome of this research will enable SELCO to a) more clearly understand current satisfaction levels with its cable and internet offerings, b) act on existing opportunities for improvement and, c) create a strategic roadmap to increase and retain cable and internet customers.



Areas of Investigation

The SELCO Cable Customer Satisfaction Study leveraged a quantitative research methodology to address the following areas of investigation:

- Rating area organizations
- Rating the cable service of SELCO
- Rating interactions with office personnel
- Rating interactions with field personnel
- Preferred methods of interacting with SELCO
- Satisfaction with current cable package
- Importance of SELCO offering video products
- Plans to cancel cable subscription
- Satisfaction with SELCO's internet service
- Current use of streaming services
- Likelihood to sign up for SELCO's Enhanced WiFi
- Likelihood to sign up for smart home services through SELCO
- Demographic profiles of respondents

Research Methodology Snapshot

Methodology Phone / Digital	No. of Completes 518 (300 phone + 218 digital)	No. of Questions 47*	Incentive None	Sample Customer List
Target Residential Customers	Quality Assurance Dual-level**	Margin of Error 4.2%	Confidence Level 95%	Research Dates December 6, 2021- January 11, 2022

* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

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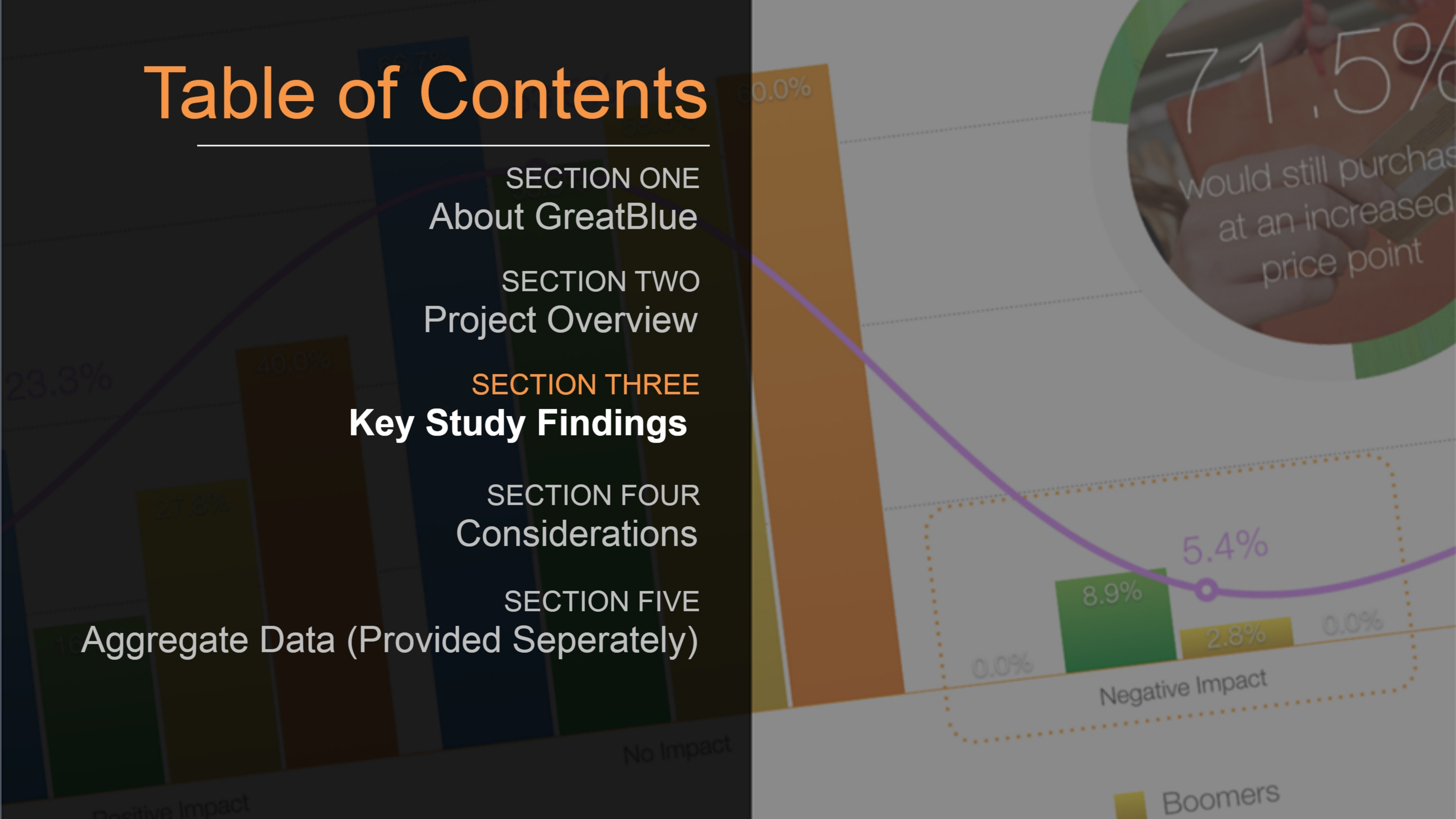
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Key Study Findings - *Prioritize Faster Internet Speeds over Enhanced Video Products*



What we learned:

In 2021, more respondents indicated "enhanced internet and broadband speeds are more important than enhanced video products" (54.4% over 41.4% in 2019), while fewer respondents reported "enhanced video products are more important than enhanced internet and broadband speeds" (6.4% from 9.6% in 2019).

Takeaway:

SELCO's cable customer base is shifting from prioritizing enhanced video products to placing importance on faster internet and broadband speeds.

Actionable strategy:

Knowing that customers' priorities are shifting, SELCO should focus on both communicating their current internet speeds and how they compare to other internet providers, as well as looking for ways to improve internet and broadband speed moving forward.

Key Study Findings - *Build Support for New App-based Television Product*



What we learned:

While over two-fifths of respondents indicated that when SELCO switches from a traditional cable TV package to an app-based service, they will continue to subscribe to SELCO's television product, 44.9% reported they are unsure if they would continue to subscribe, or switch to streaming services / DISH.

Takeaway:

While many would continue subscribing to SELCO's television product once this transition is made, others are still uncertain how they will proceed once the new app-based product is rolled out to customers.

Actionable strategy:

Within the next 12 months, SELCO should provide educational materials to customers, detailing how their new television product will function, including visuals demonstrating how to access live television, navigate through channels, and instructions for how to integrate this service through their own devices. These materials may help build support for this new television product and encourage more customers to continue to subscribe.

Key Study Findings - *Educate Customers of Benefits of Smart Home Services*



What we learned:

Only 15.5% of respondents indicated they would be likely to sign up for smart home services, such as video monitoring, through SELCO, while 45.9% of respondents reported they would be "not at all likely" to sign up for these services, and 14.6% were unsure.

Takeaway:

Few customers are interested in signing up for smart home services through SELCO, which may be due to customers not having enough knowledge of this technology and how it could be beneficial to them.

Actionable strategy:

In order to increase the likelihood of customers enrolling in smart home services through SELCO, should this program be launched, SELCO should provide educational materials to customers detailing the benefits of using smart home services through SELCO, such as the added protection services like video monitoring provide. These materials may also describe the different types of smart home services SELCO could offer, and the ultimate ease of use and functionality of these devices.

Customer Service Drives Cable Satisfaction

In 2021, respondents provided a decreased average positive rating when rating SELCO among several cable service characteristics (77.7% from 81.1% in 2019).

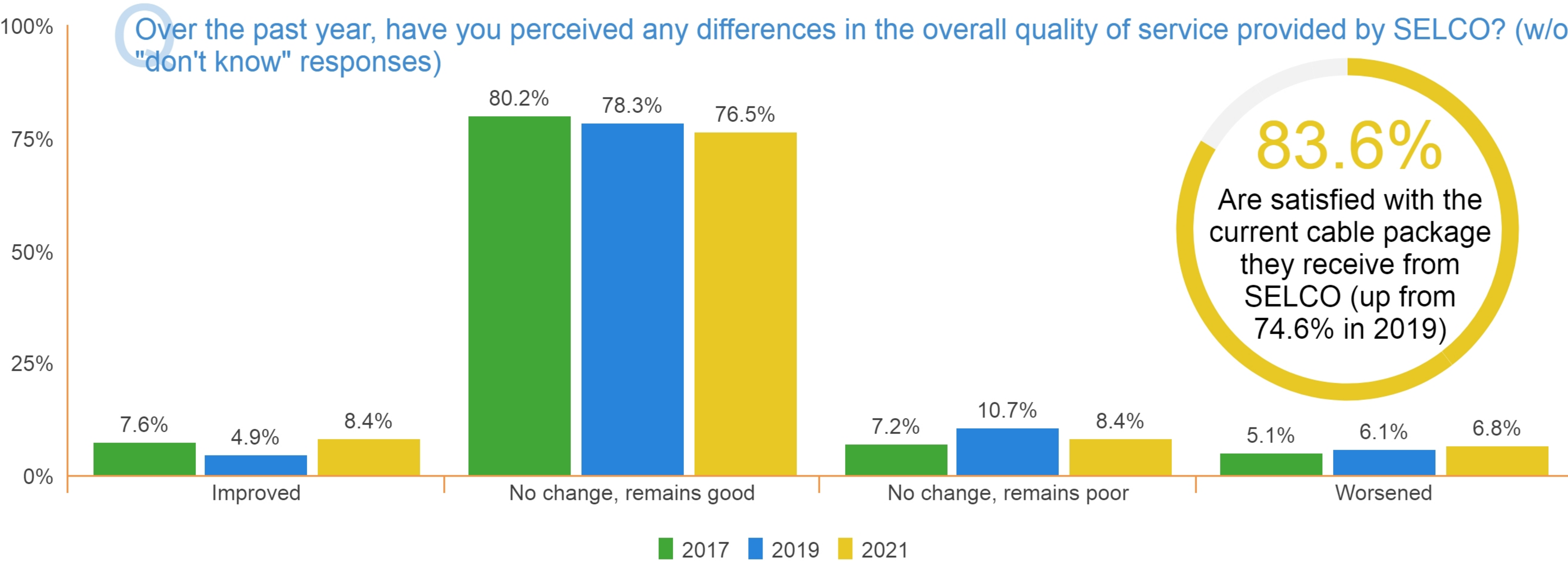
Customers provided the highest positive ratings for SELCO's "helpful and knowledgeable staff" (87.5%) and "communicating with customers" (83.3%).

However, of note, respondents provided decreased ratings for the "quality and reliability of Internet service" (-5.5 percentage points) and the "quality and reliability of TV service" (-5.4 percentage points).

	2017	2019	2021
Helpful and knowledgeable staff	95.8%	91.7%	87.5%
Communicating with customers	89.0%	88.0%	83.3%
Quality and reliability of TV Service	-	83.3%	77.9%
Quality and reliability of Internet service	97.4%	82.4%	76.9%
Variety of service offerings	-	76.6%	74.0%
Rates for cable service	89.6%	64.8%	66.7%
Average	93.0%	81.1%	77.7%

Increased Satisfaction with Current Cable Package

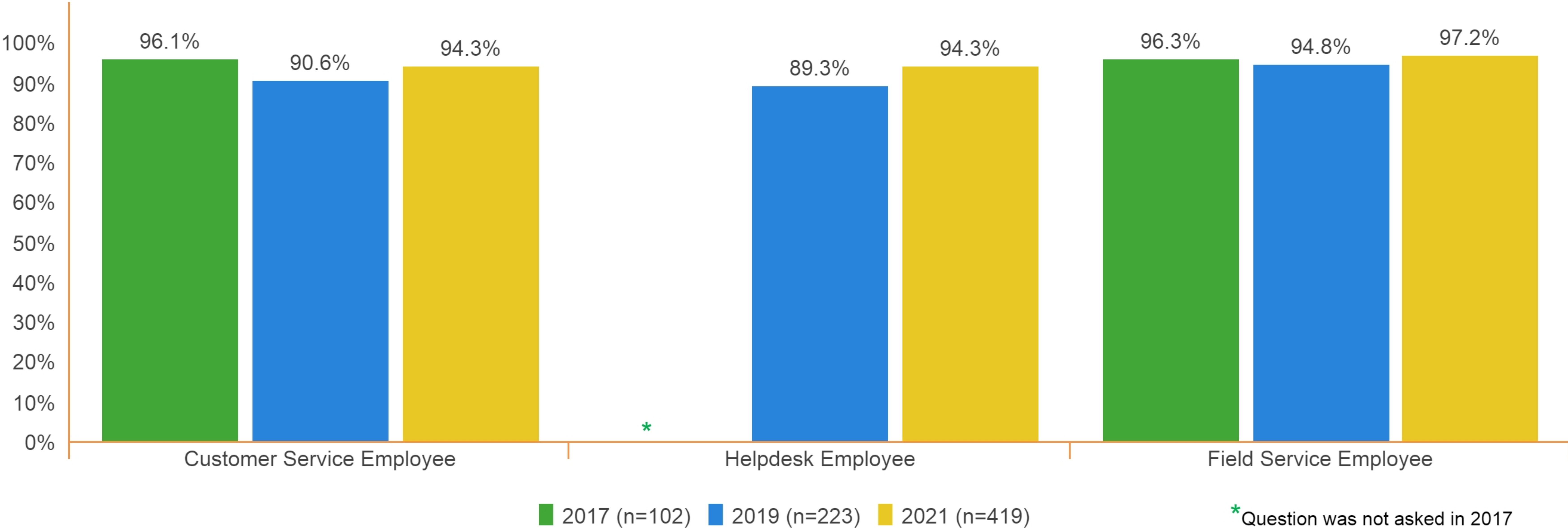
A decreased frequency of customers surveyed in 2021 (76.5% from 78.3% in 2019) noted the overall quality of the service provided by SELCO Cable has remained good. Meanwhile, an increased frequency of respondents (8.4% over 4.9% in 2019) reported the quality of service provided by SELCO has improved. Further, over four-fifths of respondents (83.6%) reported being satisfied with the current cable package they receive from SELCO (up from 74.6% in 2019).



Satisfied with SELCO Employee Groups

Of the 457 respondents who reported interaction with a customer service employee in 2021, over nine-out-of-ten (94.3%) reported being satisfied with the interaction (up from 90.6% in 2019). Similarly, of the 448 respondents who interacted with a Helpdesk employee in 2021, 94.3% (up from 89.3% in 2019) reported being satisfied with the interaction. Of the 389 respondents who had a field service employee visit their home, a higher frequency (97.2%) reported being satisfied with the visit (up from 94.8% in 2019).

Overall, how satisfied were you with the way the employee handled the call or visit? Would you say you were... (Total “satisfied” responses)



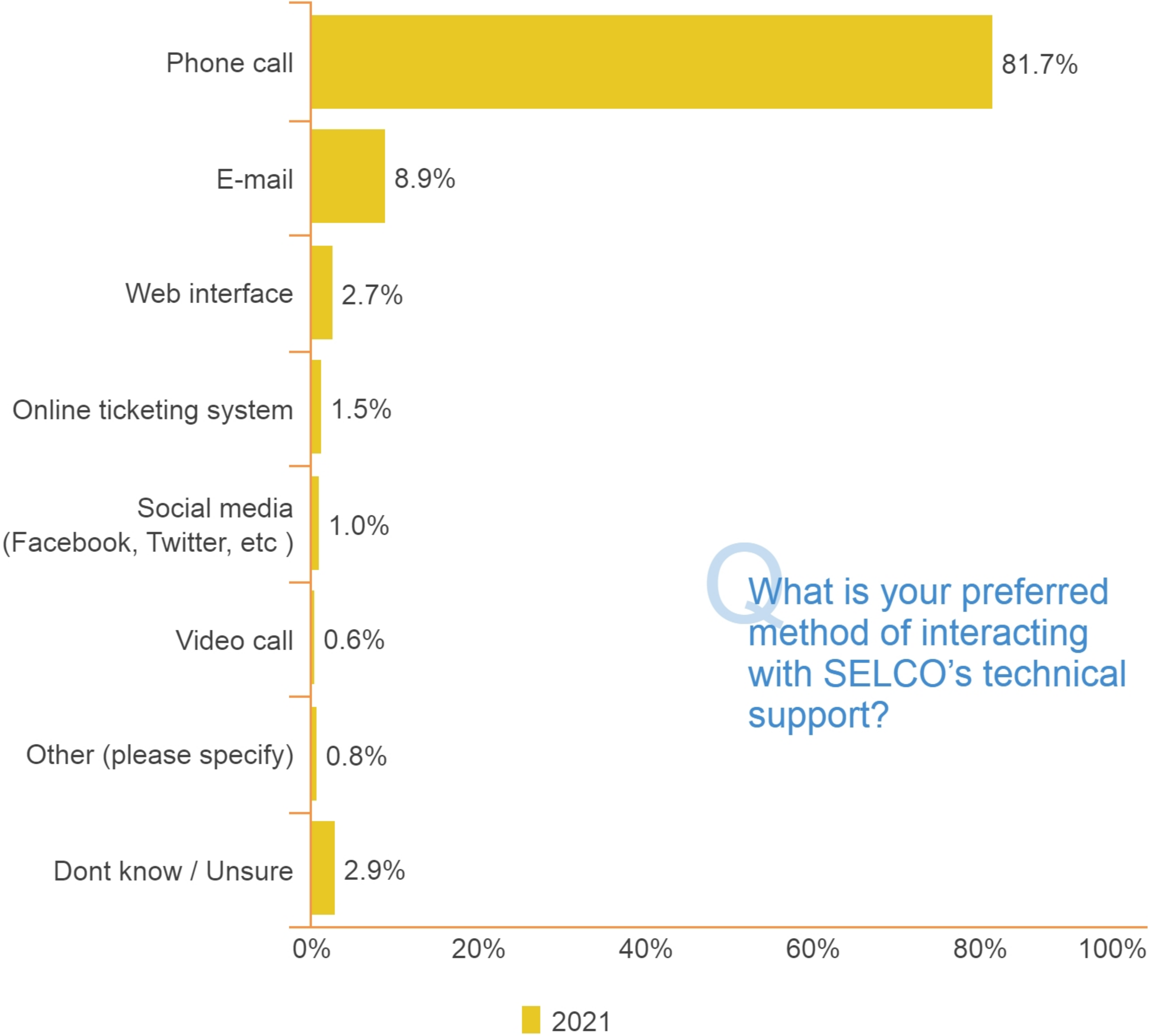
Satisfied with SELCO Employee Groups

- In the 2021 study, 27.8% of respondents who had a visit from a SELCO Cable field service employee, reported being "unsure" how satisfied they were with their experience. Some reasons for the high number of "don't know" responses in this year's study include:
 - The question asks respondents to provide their satisfaction, if they've had an interaction with a SELCO field service employee in the past year. It is possible respondents had such an interaction up to a year ago, and can't recall specific details of their interaction / be able to evaluate how satisfied they were with their experience.
 - There are now numerous factors that go into a customers' experience with a field service employee because of the COVID-19 pandemic, such as mask wearing, social distancing, and following safety protocols.
 - A respondent may have had a field service employee visit their home for service, but were not home, or another member of the household was home while they were not, and so the respondent did not have an interaction with the employee themselves.

Prefer Interacting with Technical Support by Phone

Over four-fifths of surveyed customers (81.7%) reported they would prefer to interact with SELCO's technical support through a "phone call."

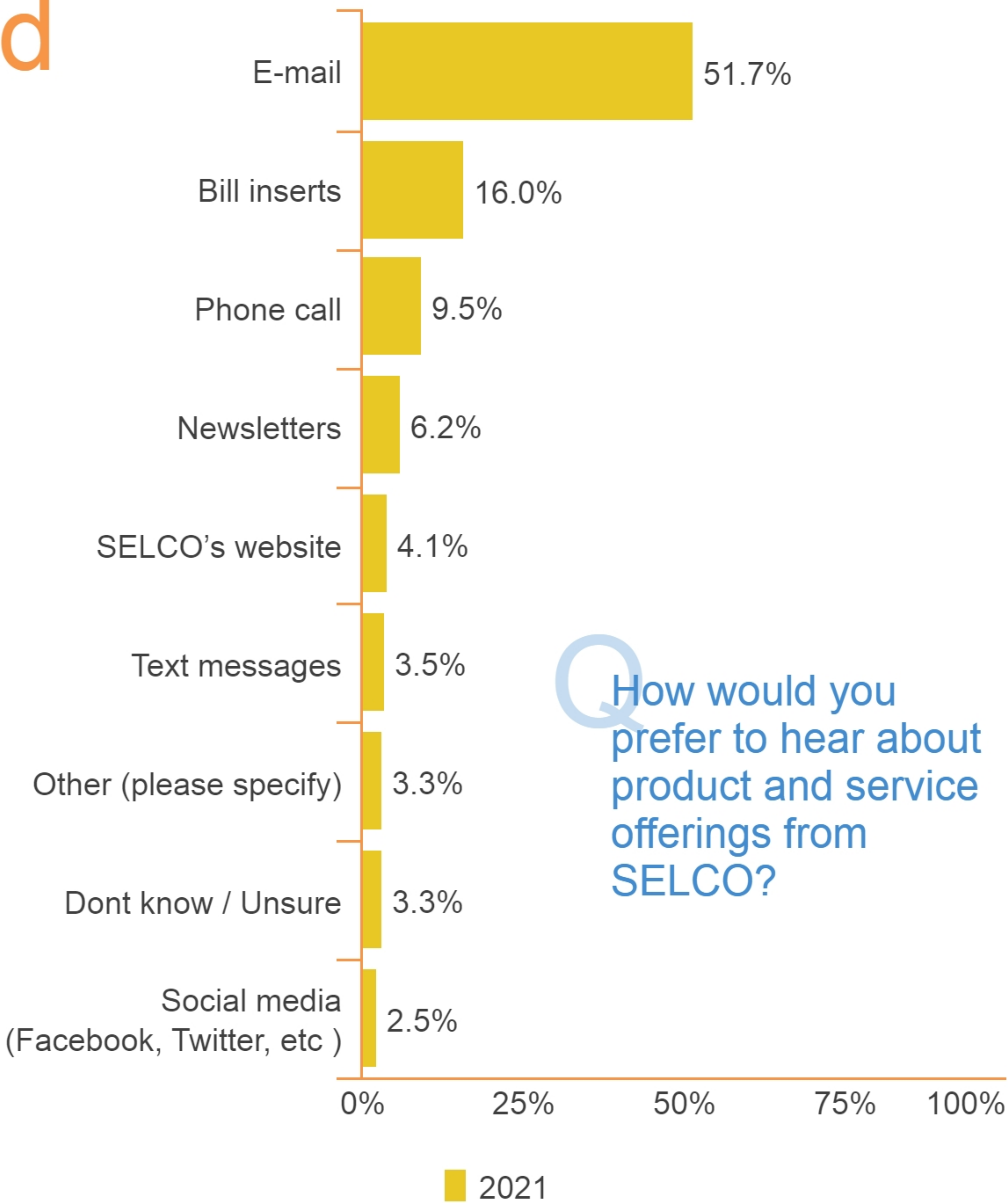
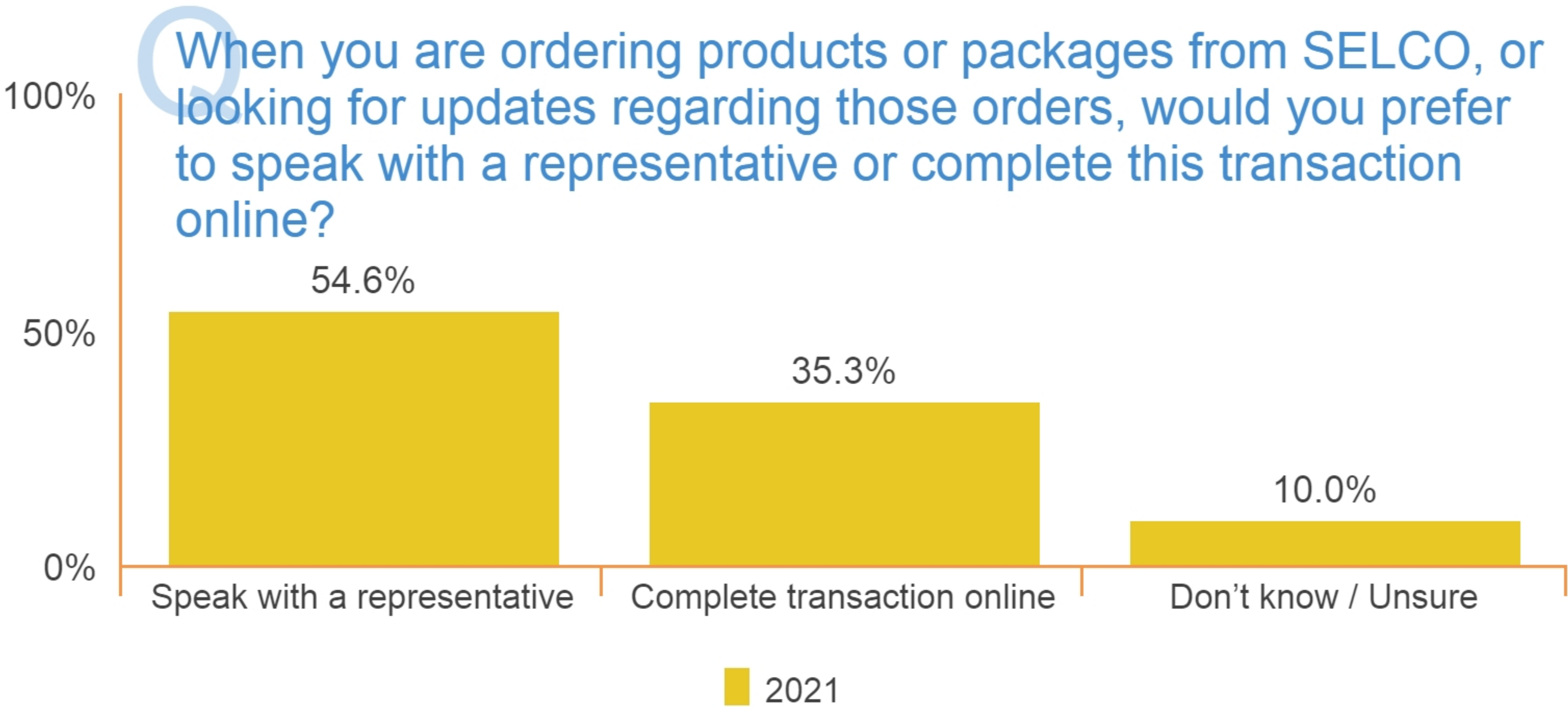
Others reported a preference for interacting with SELCO's technical support through "e-mail" (8.9%), a "web interface" (2.7%) or a "ticketing system" (1.5%).



Prefer to Receive Product and Service Offerings by E-mail

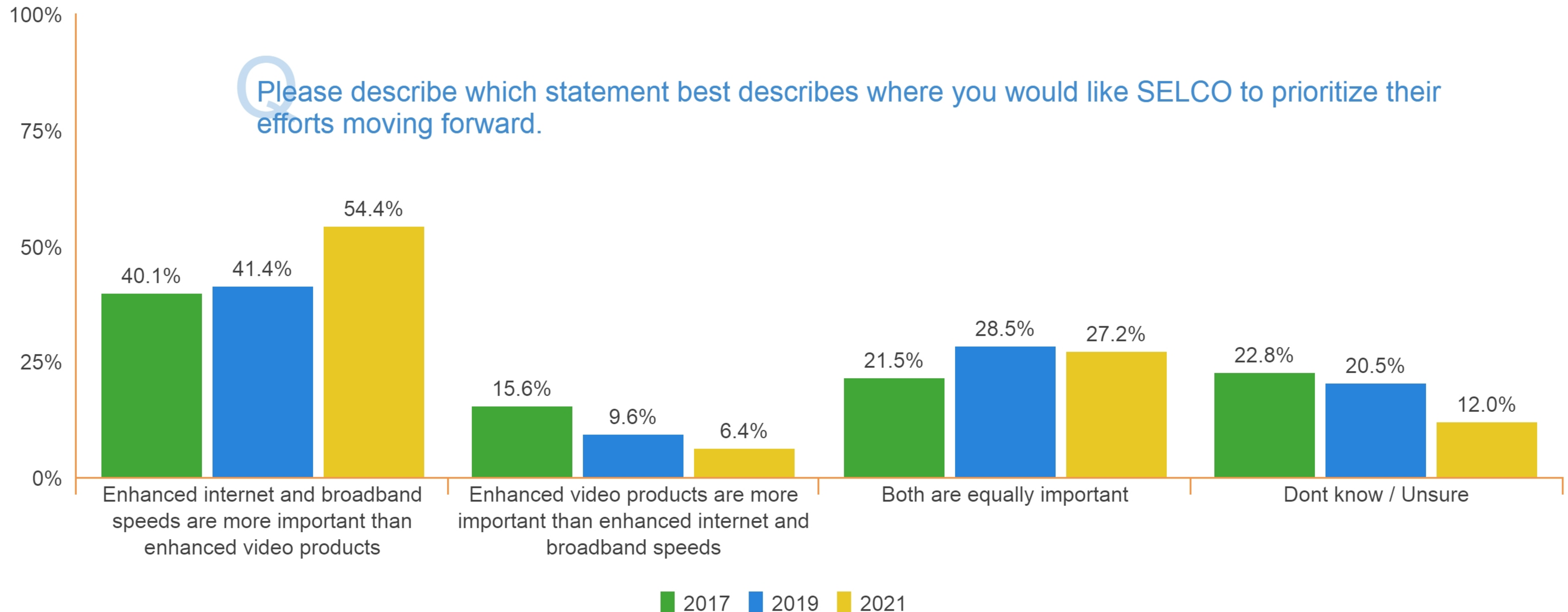
Over one-half of respondents reported a preference for hearing about product and service offerings from SELCO through "e-mail" (51.7%), while 16.0% reported they would prefer to receive this information in "bill inserts."

When ordering products or packages, over one-half of respondents (54.6%) indicated they would prefer to "speak with a representative" to complete the transaction, while over one-third reported they would prefer to "complete transaction online" (35.3%).



Prioritize Internet Speed over Video Products

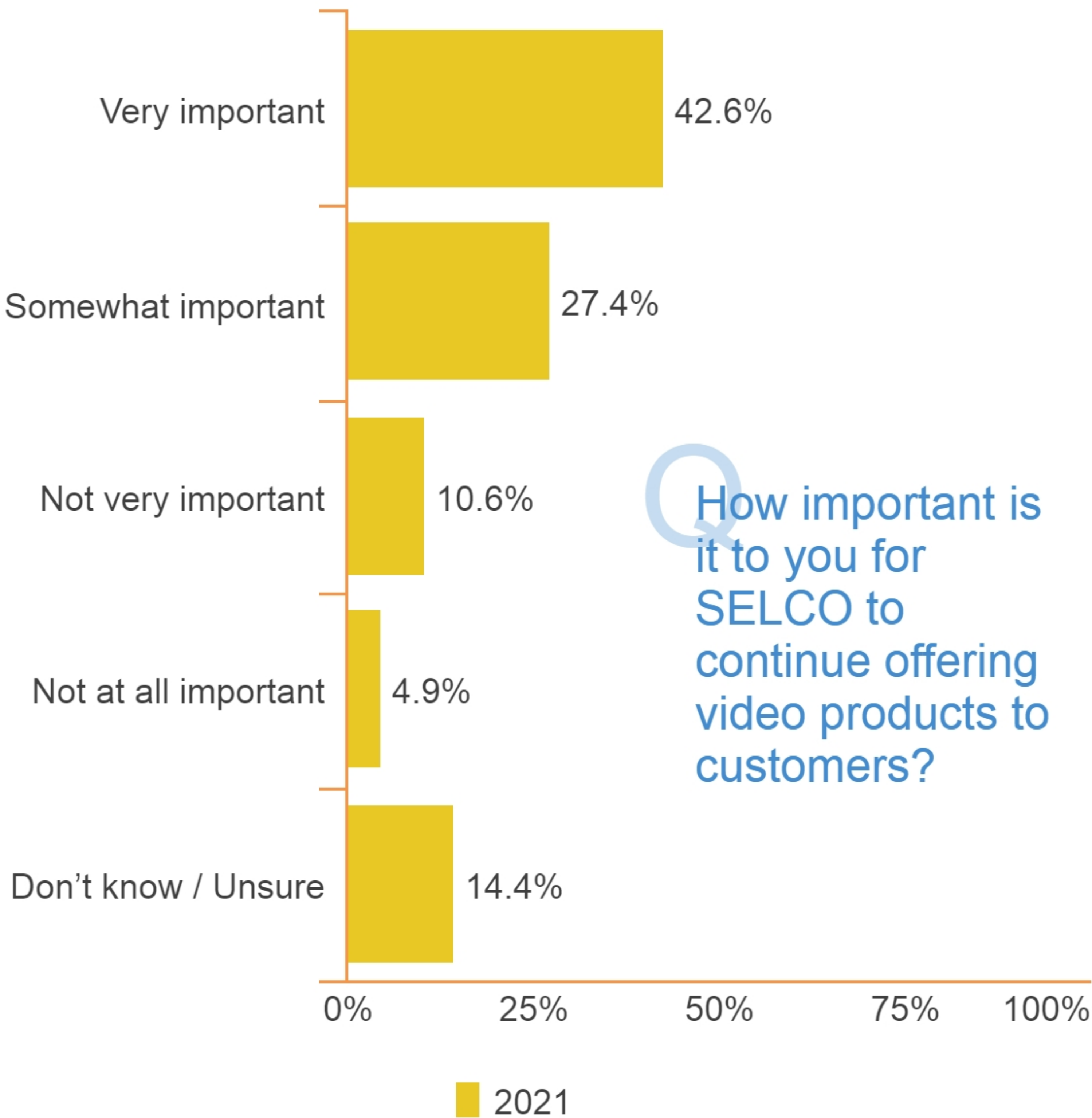
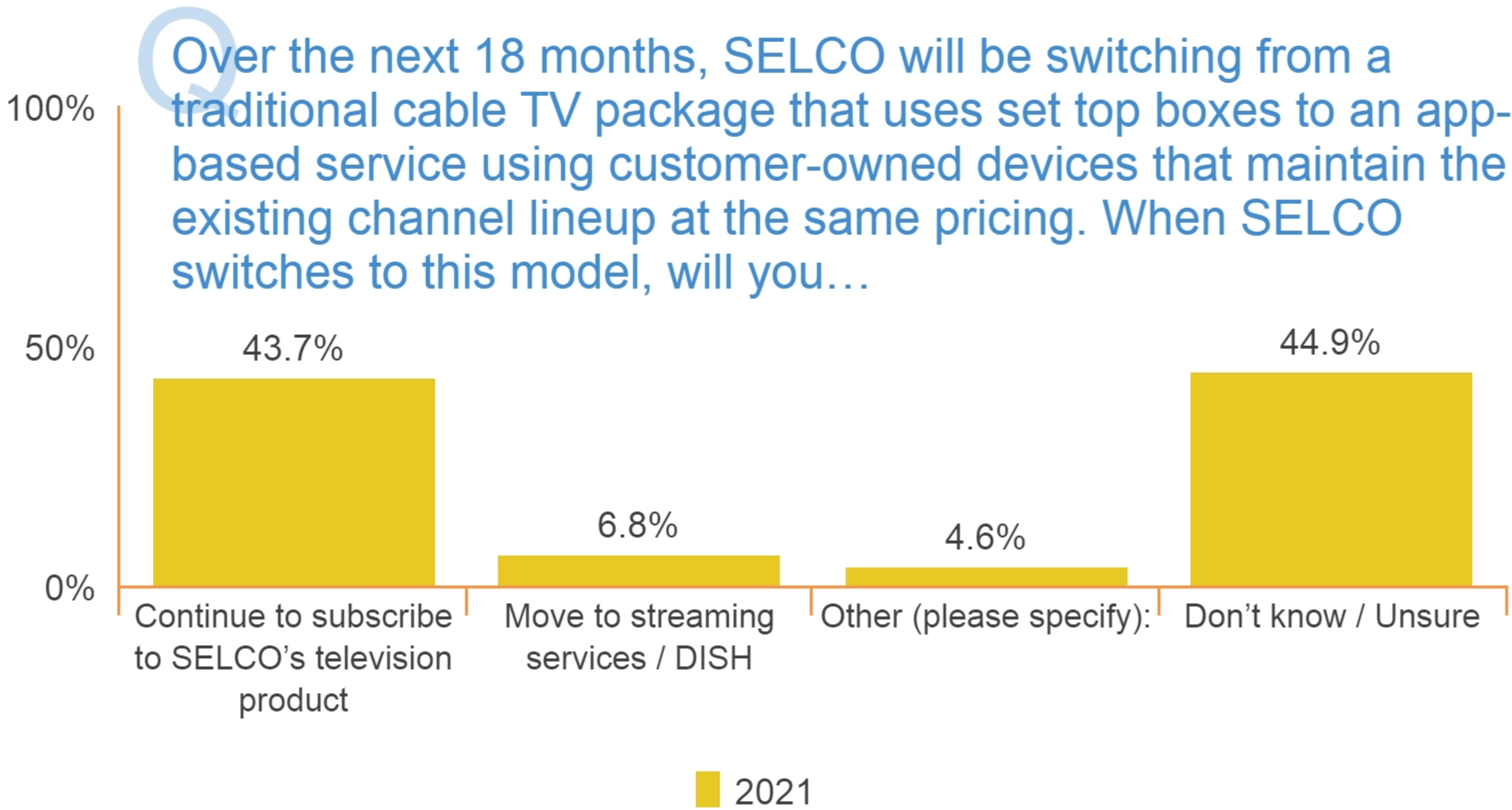
An increased frequency of respondents (54.4% in 2021 over 41.4% in 2019) indicated "enhanced internet and broadband speeds are more important than enhanced video products." Meanwhile, a decreased frequency of respondents (6.4% from 9.6% in 2019) reported "enhanced video products are more important than enhanced internet and broadband speeds."



Find it Important for SELCO to Offer Video Products

Over two-fifths of respondents (43.7%) indicated that when SELCO switches from a traditional cable TV package to an app-based service, they will continue to subscribe to SELCO's television product, while a similar frequency (44.9%) are unsure how they will proceed.

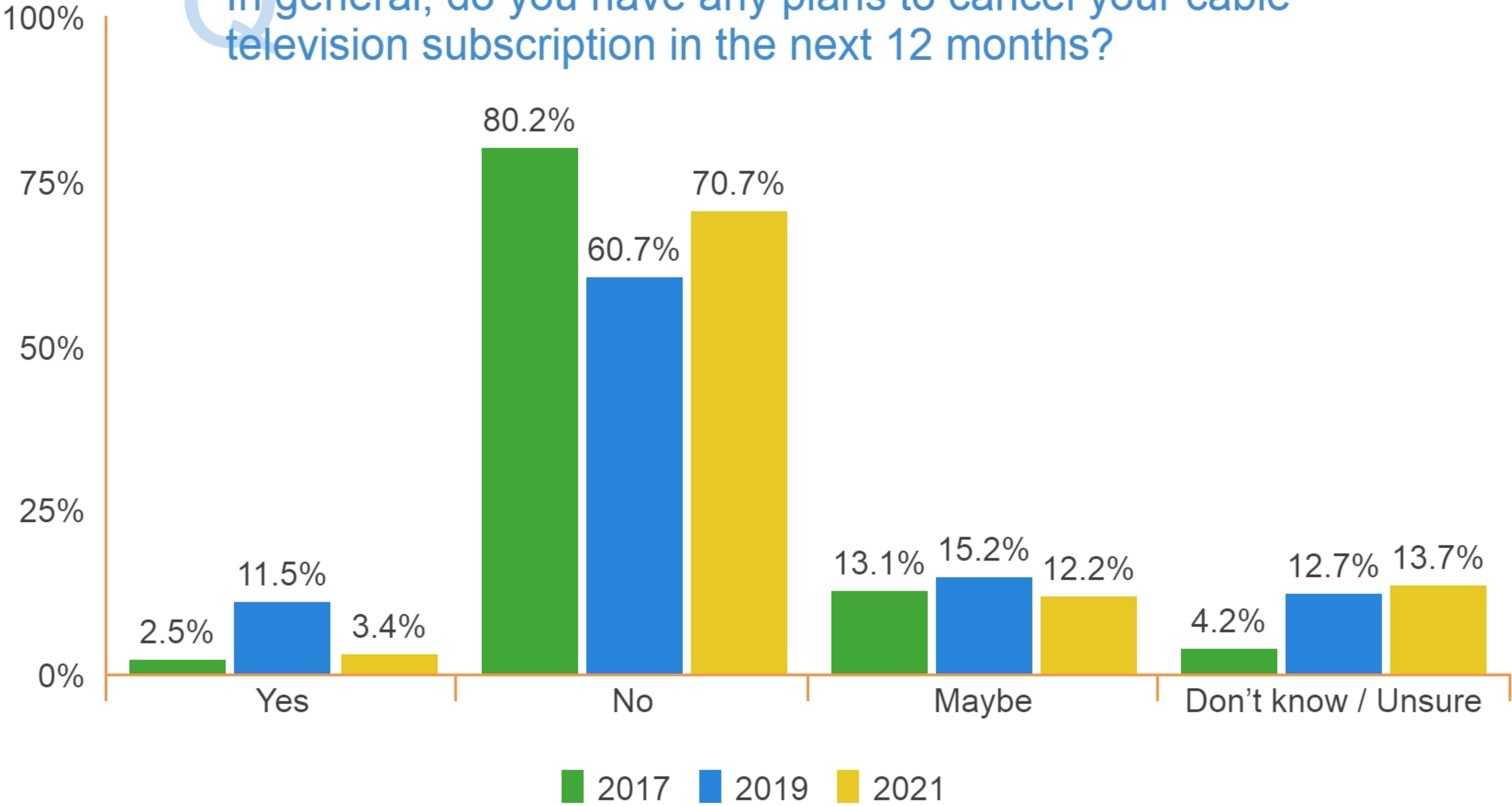
Of note, seven-out-of-ten respondents (70.0%) indicated it is important to them for SELCO to continue offering video products to customers.



Majority Do Not Plan to Cancel Cable in Next Year

Seven-out-of-ten respondents (70.7%) reported they do not have plans to cancel their cable television subscription in the next 12 months, while 12.2% responded "maybe," and 3.4% indicated they do have plans to cancel their subscription. Among the nine (9) respondents planning to cancel their cable subscription in the next 12 months, primary reasons for doing so included "too expensive / rates rising," "doesn't watch most of the channels," "cable picture doesn't work / freezing," "overall not worth it," and that it "needs to be app based."

In general, do you have any plans to cancel your cable television subscription in the next 12 months?

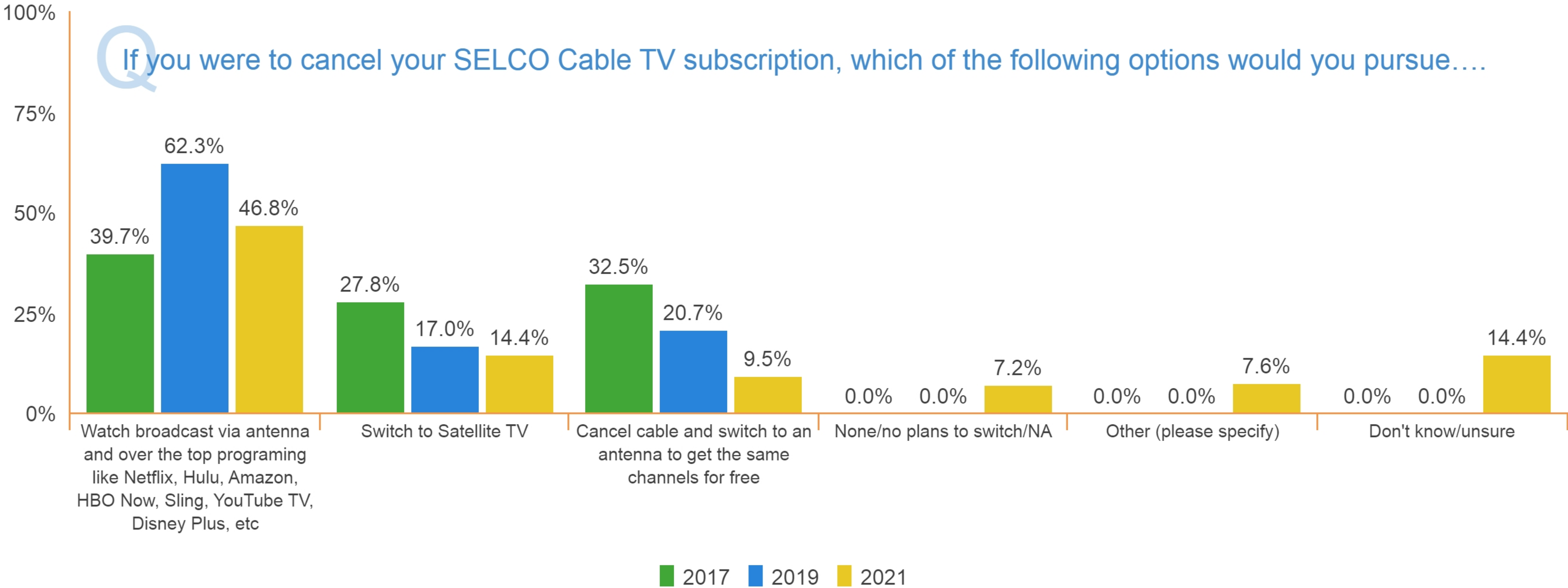


Please tell me why? (N=9)

	2017	2019	2021
Too expensive/ rates rising	59.5%	30.4%	44.4%
Doesn't watch most of channels	2.7%	0.0%	11.1%
Cable picture doesn't work/ freezing	5.4%	0.0%	11.1%
Overall not worth it	0.0%	0.0%	11.1%
Needs to be app based	0.0%	0.0%	11.1%
Refused	0.0%	3.6%	11.1%

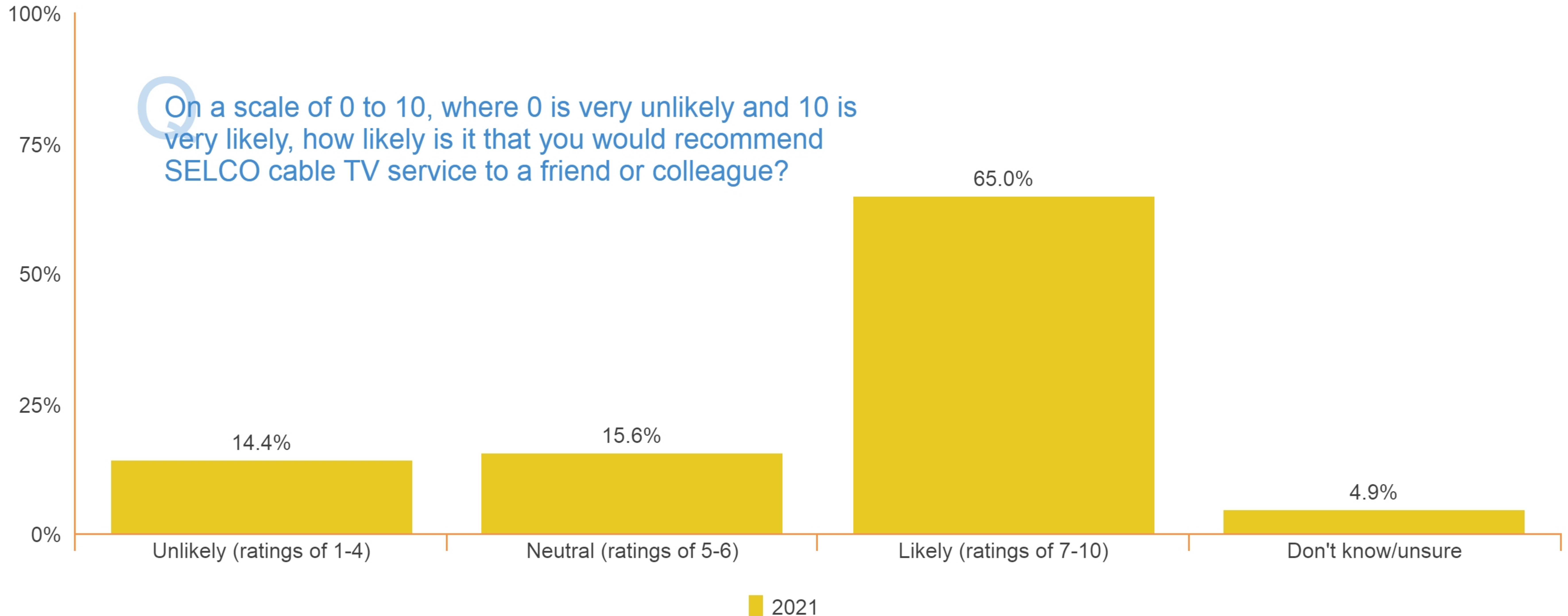
Would Switch to Streaming Upon Cable Cancellation

If respondents were to cancel their SELCO Cable subscription, over two-fifths of respondents (46.8%) would watch television broadcast via antenna and over the top programming such as Netflix, Hulu, etc. (down from 62.3% in 2019). Further, a decreased frequency of respondents indicated they would "switch to Satellite TV" (14.4% from 17.0% in 2019) or "cancel cable and switch to an antenna" (9.5% from 20.7% in 2019), while more respondents reported being unsure which option they would pursue (14.4%).



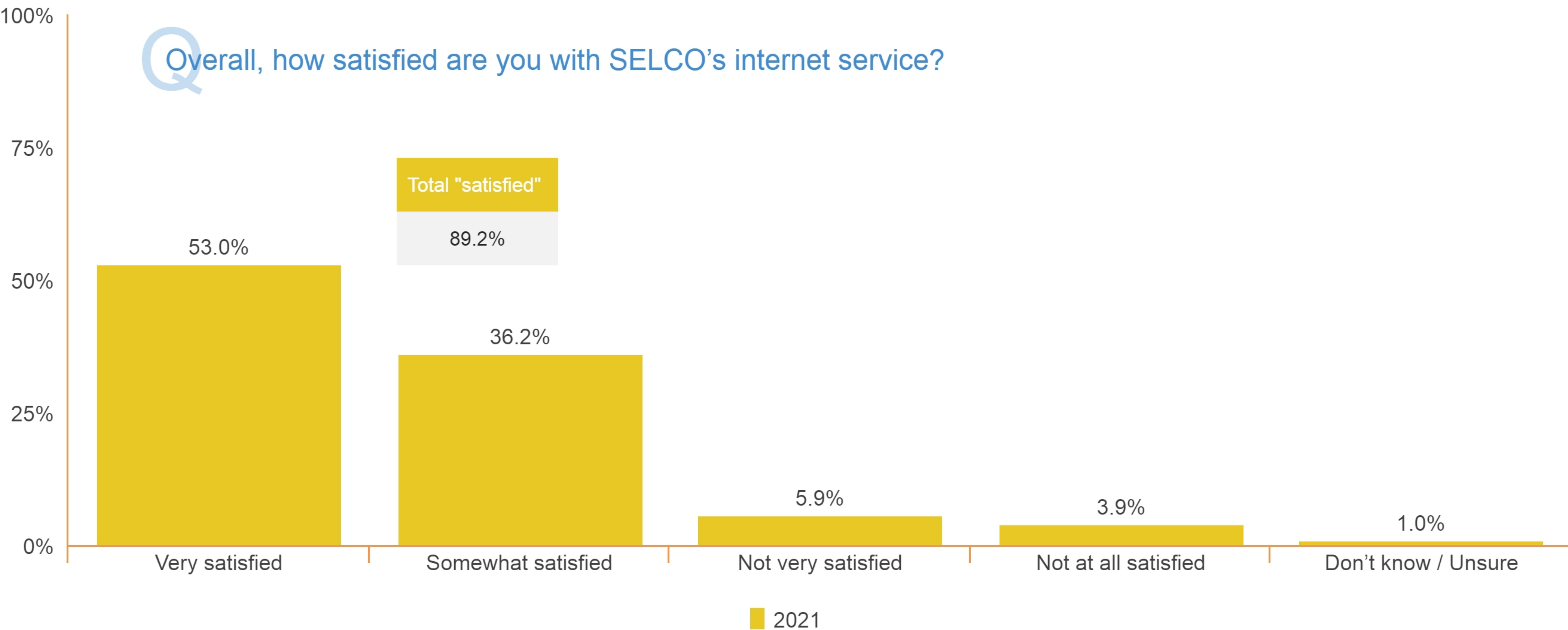
Likely to Recommend Cable Service

Nearly two-thirds of surveyed customers (65.0%) indicated they would be likely to recommend SELCO cable TV service to a friend or colleague, with only 14.4% of respondents reporting they would be unlikely to do so.



Majority Satisfied with Internet Service

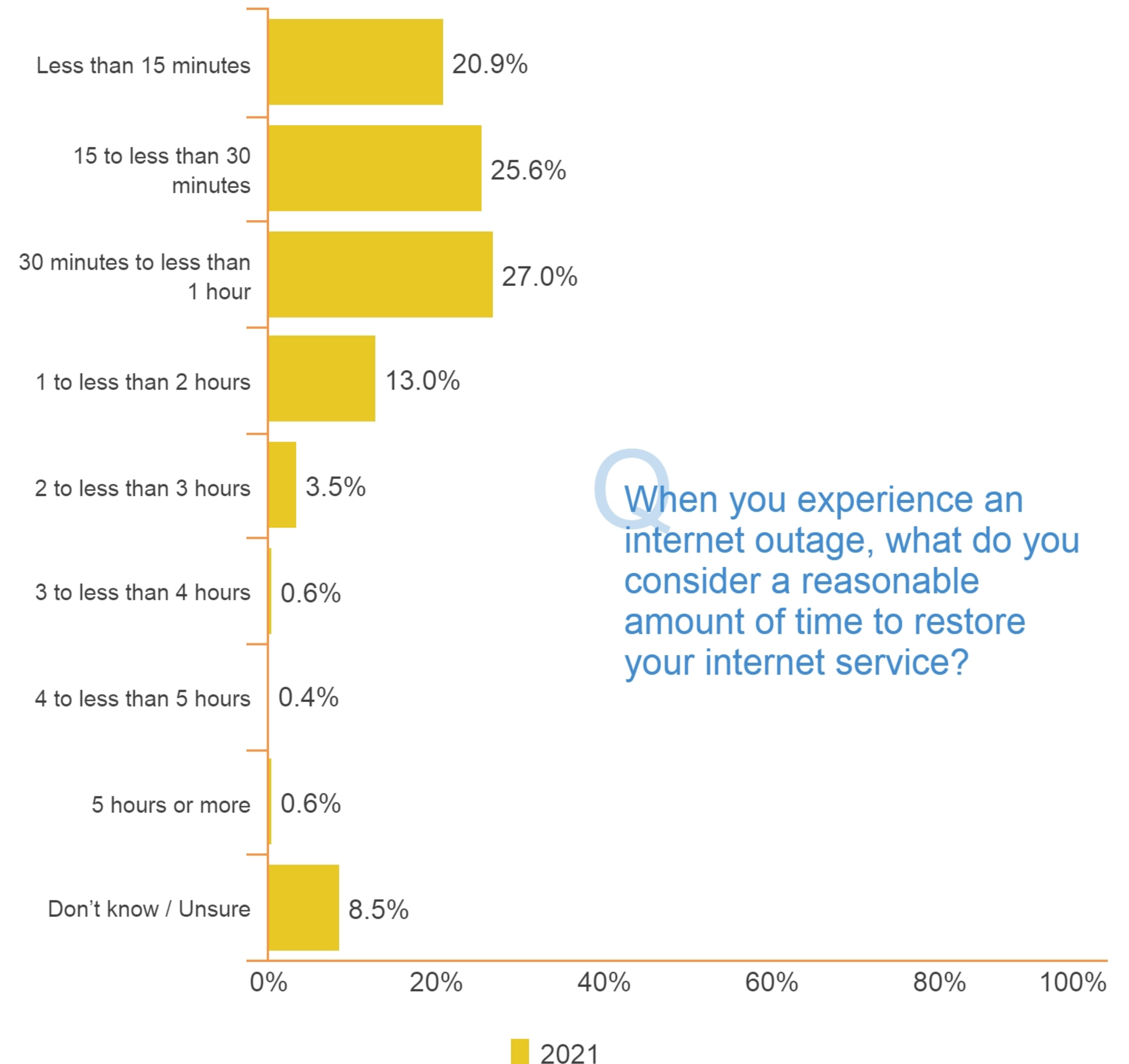
Nearly nine-out-of-ten respondents who receive internet service from SELCO, 89.2%, reported they are either "very satisfied" (53.0%) or "somewhat satisfied" (36.2%) with SELCO's internet service.



Find Less Than 1 Hour Acceptable for Restoring Internet

When experiencing an internet outage, nearly three-quarters of respondents (73.5%) indicated a reasonable amount of time to restore their internet service is either "30 minutes to less than 1 hour" (27.0%), "15 to less than 30 minutes" (25.6%) or "less than 15 minutes" (20.9%).

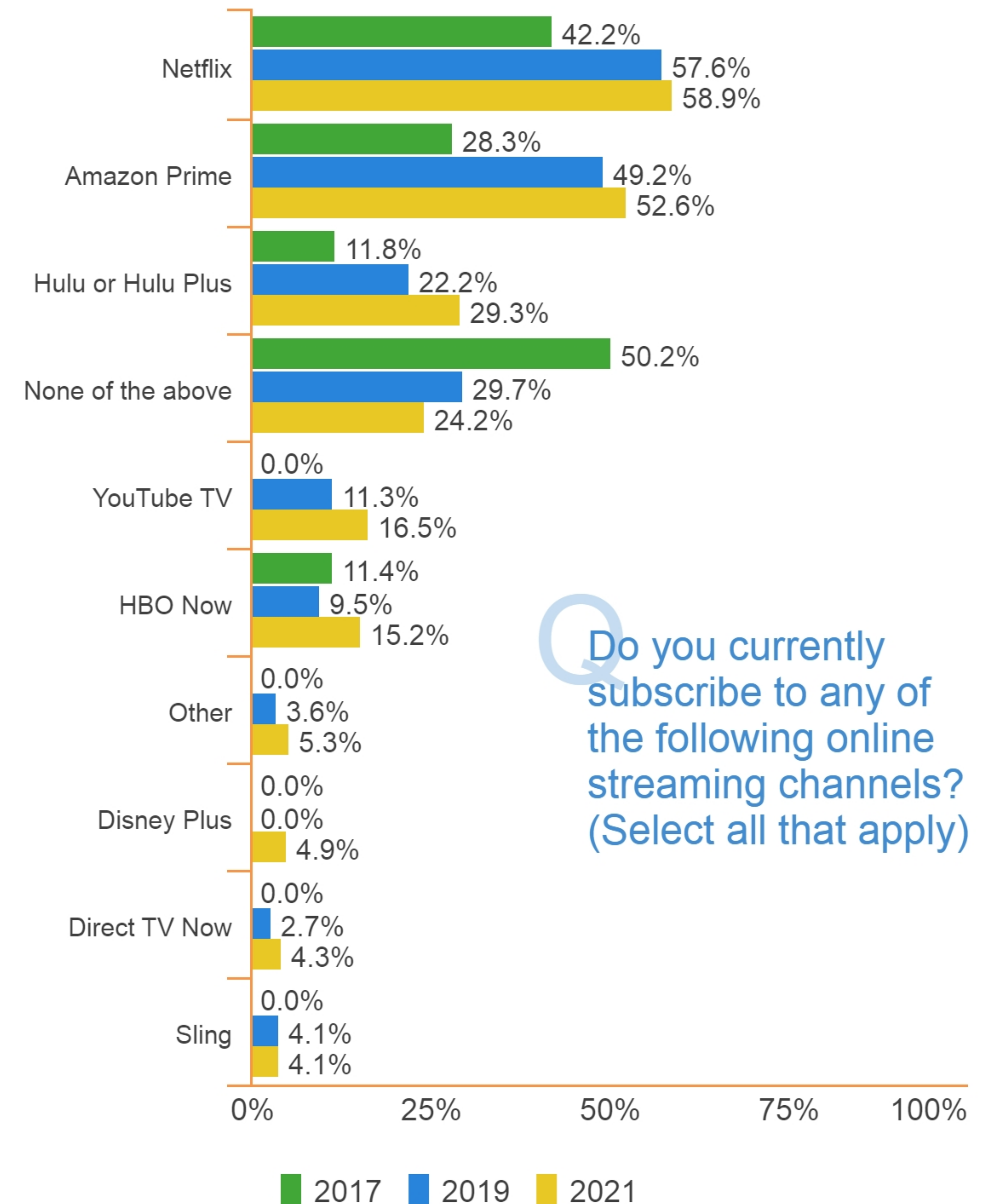
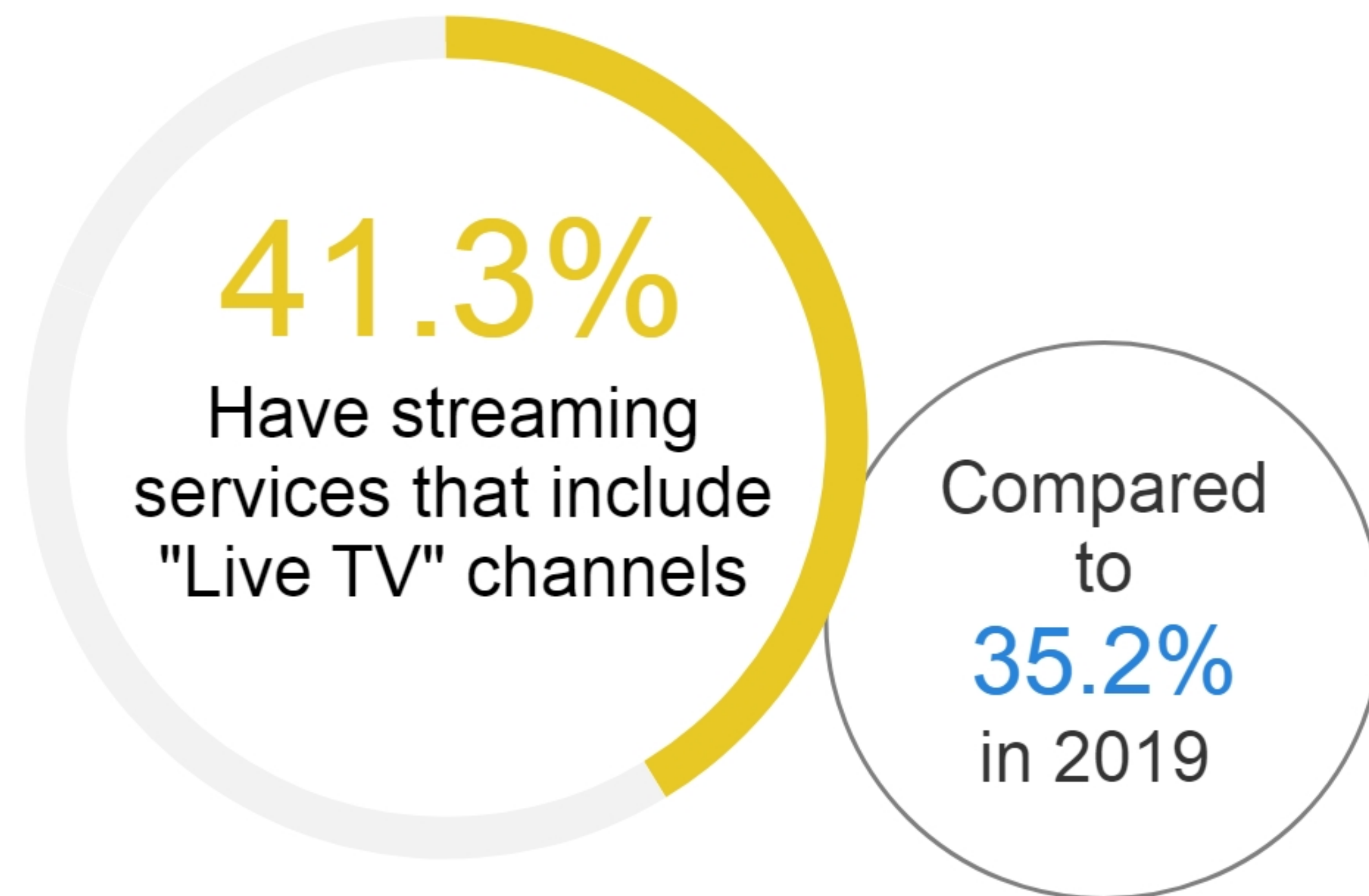
Meanwhile, nearly one-fifth of respondents (18.1%) reported a restoration time greater than 1 hour would be acceptable for them.



Primarily Stream Through Netflix or Amazon Prime

Over one-half of respondents reported subscribing to Netflix (58.9%) or Amazon Prime (52.6%), and over one-quarter (29.3%) noted they subscribe to Hulu or Hulu Plus.

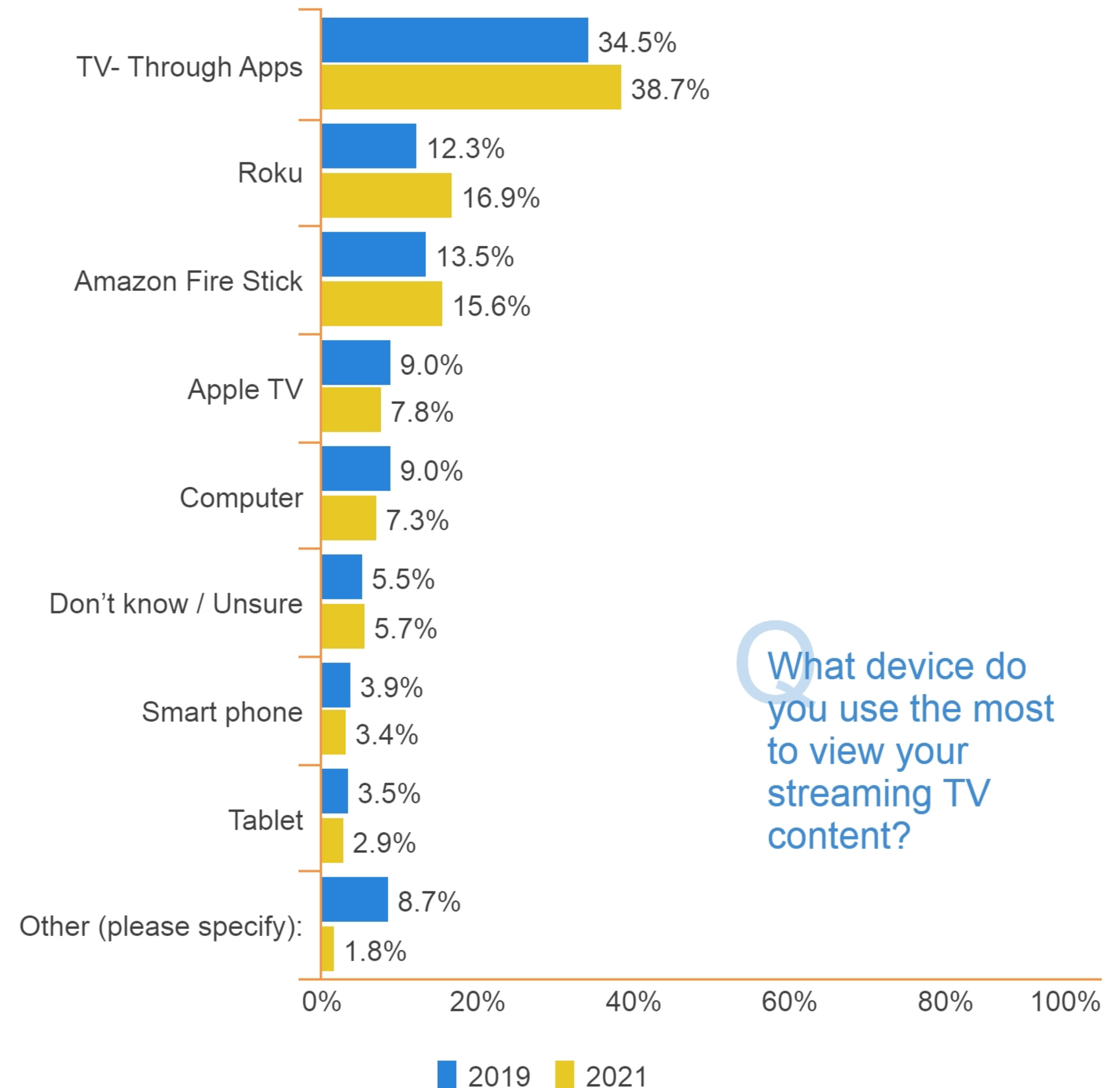
Over two-fifths of respondents (41.3%) indicated the streaming services they use include "Live TV" channels (up from 35.2% in 2019).



Stream Content on the TV Through Apps

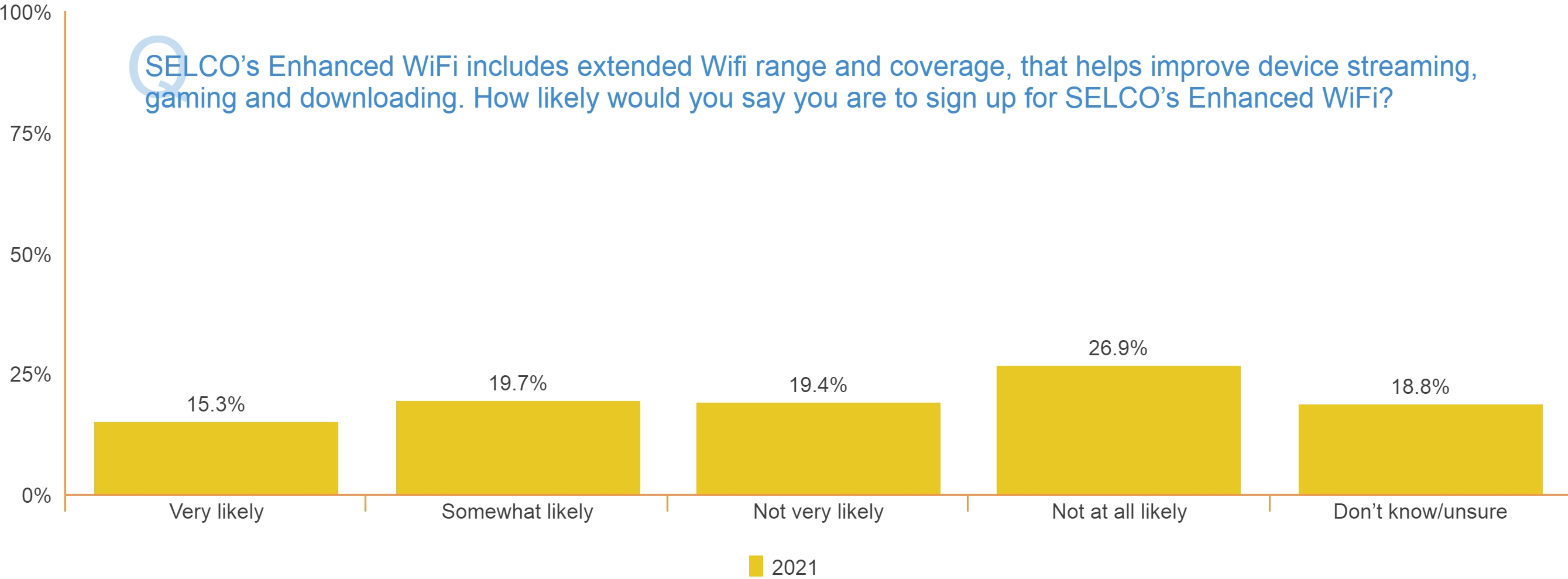
Of those respondents who subscribe to online streaming channels, nearly two-fifths (38.7%) indicated they most frequently use their TV, through apps, to view streaming TV content (up from 34.5% in 2019).

Additionally, 16.9% of respondents reported using a Roku and 15.6% indicated they use an Amazon Fire Stick.



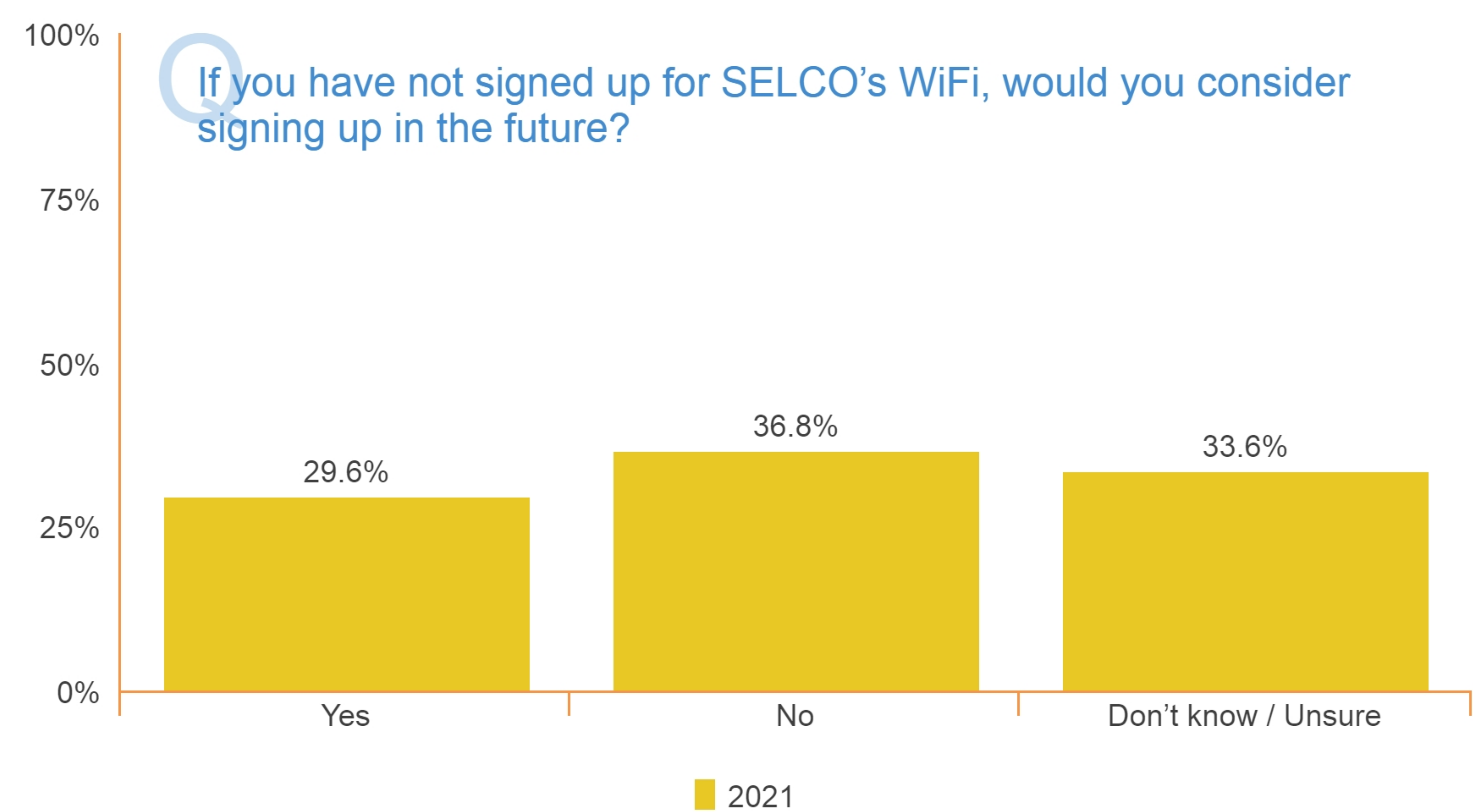
One-Third Likely to Sign Up for Enhanced WiFi

Among the 458 respondents who reported they have not already signed up for SELCO's Enhanced WiFi, over one-third (35.0%) indicated they would be either "very likely" (15.3%) or "somewhat likely" (19.7%) to sign up for Enhanced WiFi, while 18.8% were unsure of their likelihood to sign up. Of note, over one-quarter of respondents (26.9%) reported they are "not at all likely" to sign up for Enhanced WiFi.



Not Interested or Unsure of Signing up for WiFi

Of the 304 respondents who are not currently signed up for SELCO's WiFi, three-out-of-ten (29.6%) indicated they would consider signing up in the future, while over one-third (36.8%) reported they would not consider signing up for SELCO's WiFi, and 33.6% were unsure. Respondents reported they would not sign up for SELCO's WiFi because they "have their own WiFi / routers" (36.6%), are "not interested / no need" (32.1%) and its "price / cost" (5.4%).

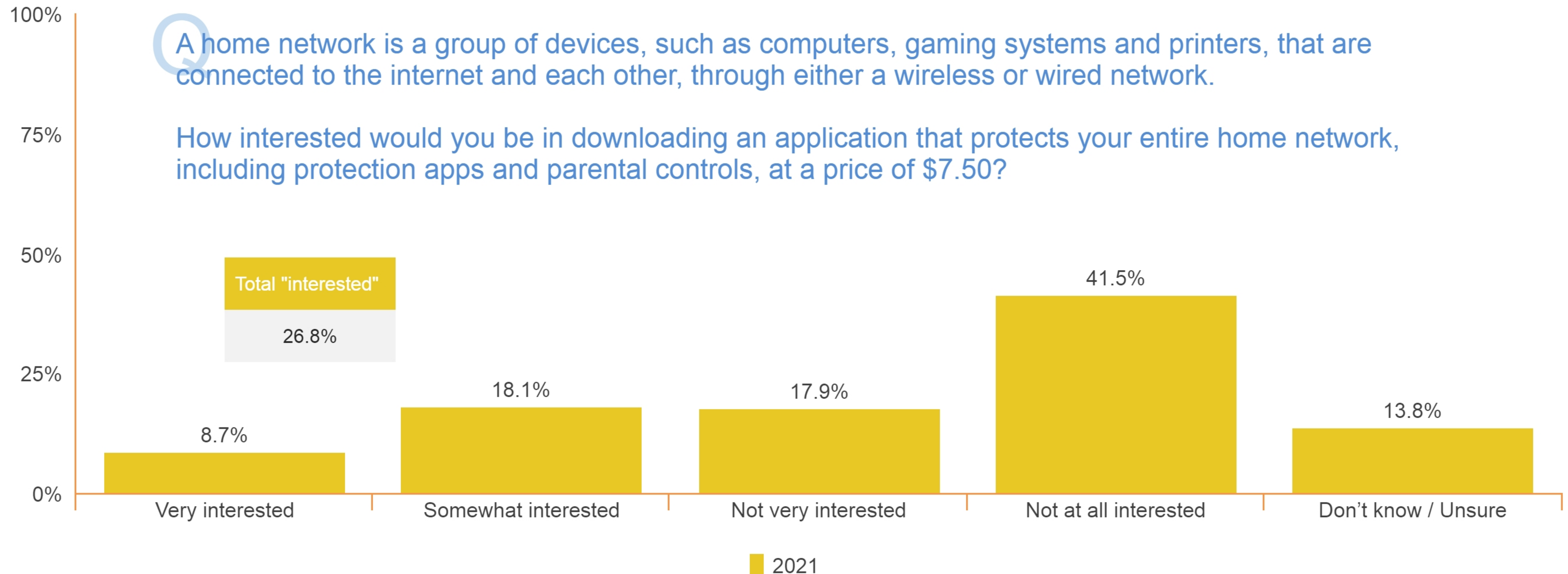


Q For what reasons would you not sign up for SELCO's WiFi?

	2021
Have their own WiFi / Routers	36.6%
Not interested / no need	32.1%
Price / cost	5.4%
None / NA	5.4%
Don't know / unsure	5.4%
Satisfied with current supplier	3.6%
Other	3.6%
Poor quality / service	2.7%
Need more information / don't know about it	1.8%

Low Interest in Home Network Protection App

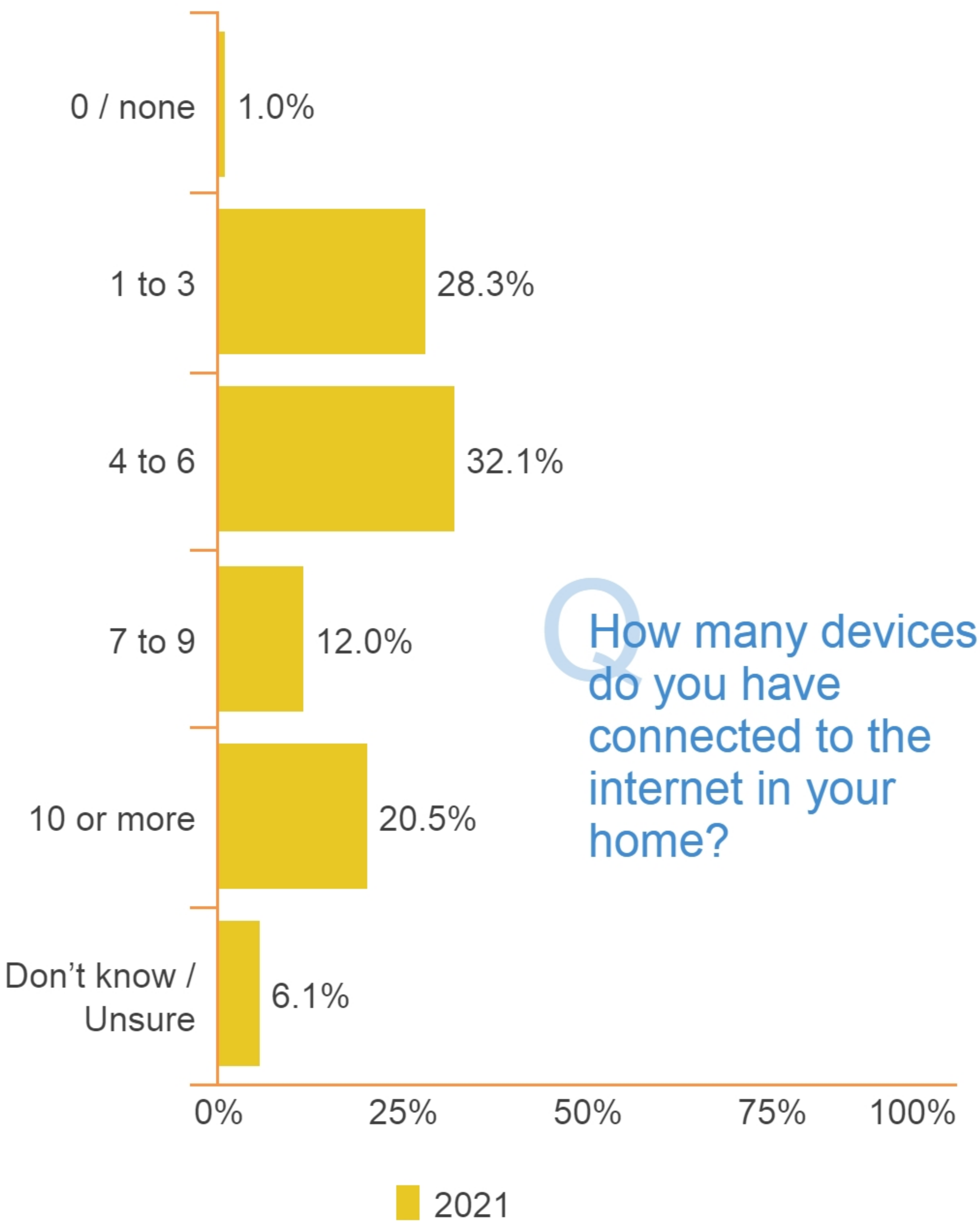
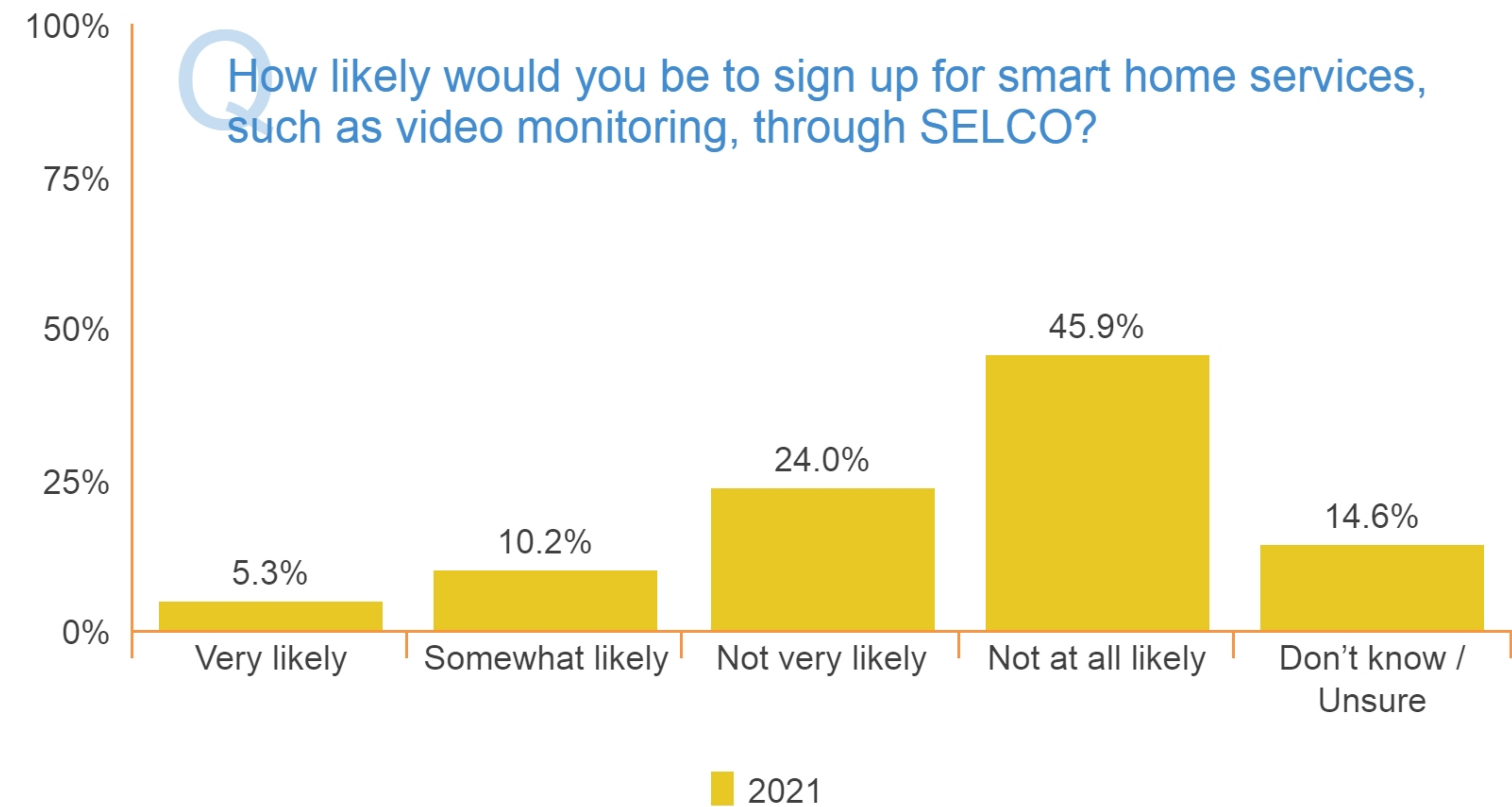
While over one-quarter of surveyed customers, 26.8%, indicated they would be either "very interested" (8.7%) or "somewhat interested" (18.1%) in downloading an application that protects their entire home network, over two-fifths (41.5%) reported they are "not at all interested" in this application.



Not Likely to Sign Up for Smart Home Services

Only 15.5% of respondents indicated they would be likely to sign up for smart home services, such as video monitoring, through SELCO, while 45.9% reported they would be "not at all likely" to sign up for these services.

Nearly one-third of respondents (32.1%) reported having 4 to 6 devices connected to the internet in their home, while over one-quarter (28.3%) reported having 1 to 3 devices connected to the internet, and one-fifth (20.5%) have 10 or more devices.



Likely to Recommend Internet Service

Seven-out-of-ten surveyed customers (70.5%) indicated they would be likely to recommend SELCO internet service to a friend or colleague, with only 14.8% of respondents reporting they would be unlikely to do so.

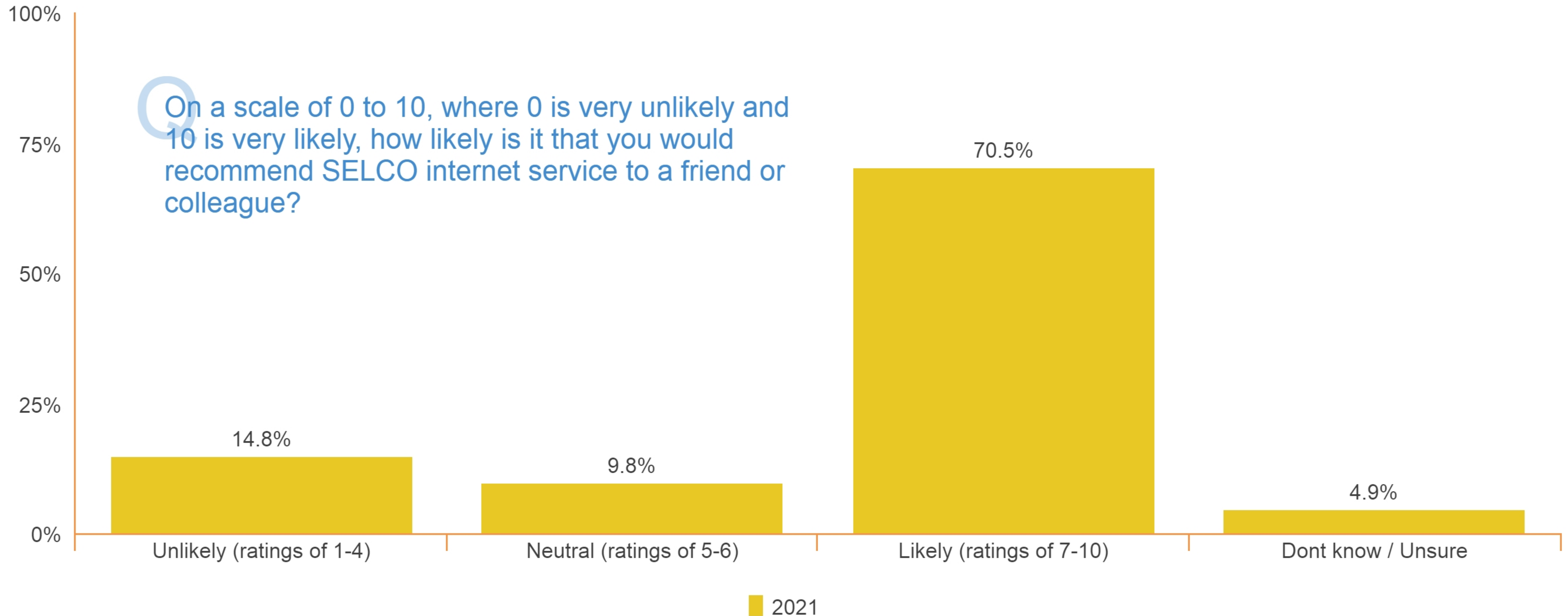


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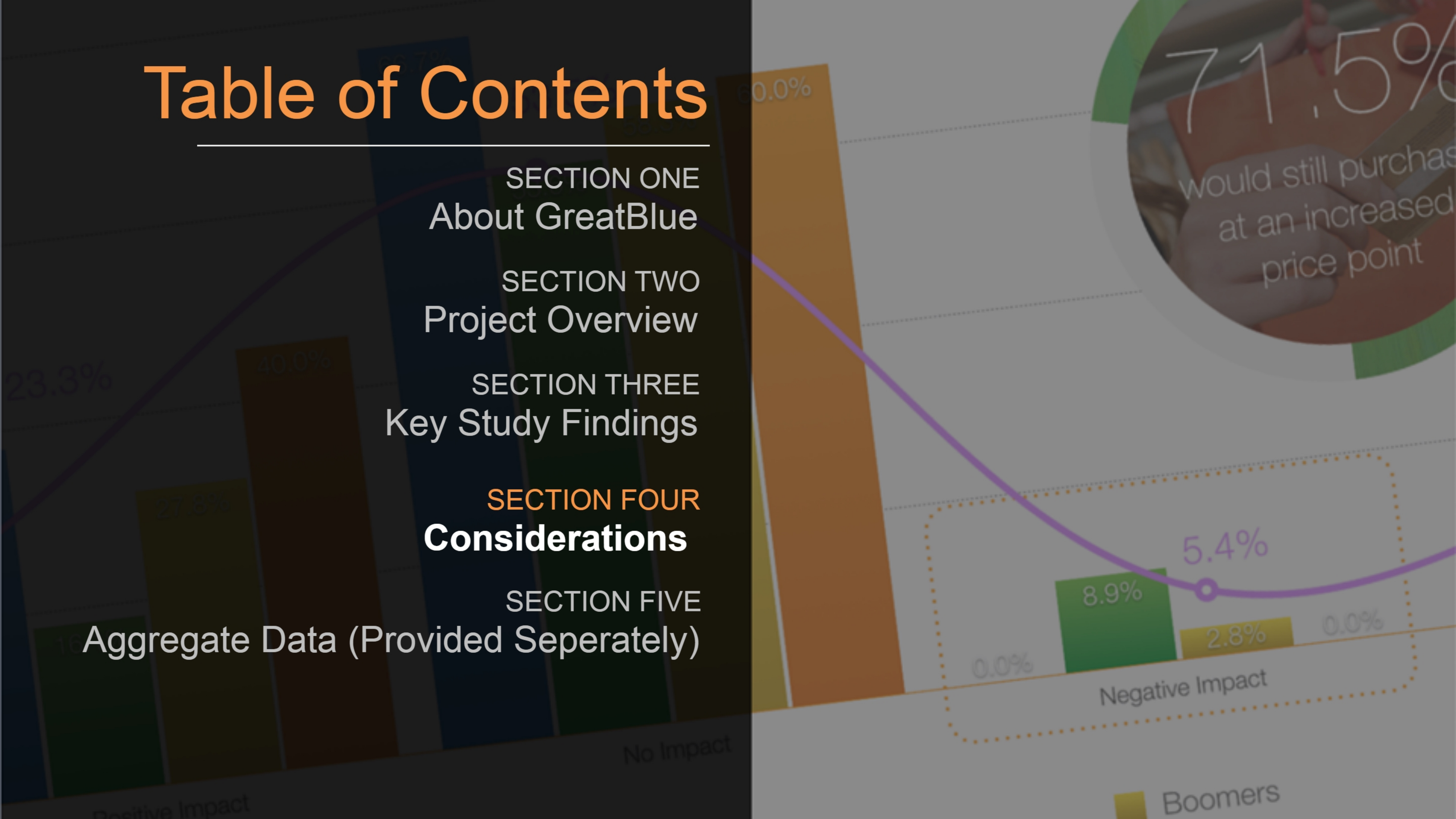
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Considerations

- **Focus on prioritizing enhanced internet and broadband speeds over enhanced video products.** In 2021, an increased frequency of respondents (54.4% over 41.4% in 2019) reported that "enhanced internet and broadband speeds are more important than enhanced video products," while a decreased frequency of respondents (6.4% from 9.6% in 2019) reported that "enhanced video products are more important than enhanced internet and broadband speeds." Seeing as SELCO's cable customer base is shifting from prioritizing video products toward achieving faster internet and broadband speeds, it is recommended that in the coming years, SELCO place an increased focus on both conveying their current internet speeds and how these compare to other providers in the area, as well as look for ways to improve internet speeds for customers. SELCO may also consider communicating to customers ways they can improve their internet speeds and streaming experience, such as by adding SELCO WiFi to their internet package, and the benefits this add-on provides over using an external provider for WiFi.
- **Build support for new app-based television product.** When asked how they will proceed when SELCO transitions from their traditional cable TV package to an app-based service, over two-fifths indicated they would continue to subscribe to SELCO's television product, while 44.9% reported they are unsure if they would continue to subscribe, or switch to streaming services / DISH. To help build support for this new television product and encourage more customers to continue to subscribe to SELCO's television product once this transition is made, it is recommended that SELCO provide educational materials to customers, detailing how this new product will function and differences from the previous model, as well as visual aids demonstrating how to access live television and navigate through channels. It may also be beneficial for these materials to describe customer-owned devices that would be compatible with this service, and instructions for how to integrate this service with these devices. Using these materials to better inform customers of the new television product may help build support and ultimately encourage more customers to continue to subscribe once this transition is made.

Considerations

- **Educate customers of the benefits of smart home services.** Few customers reported they would be likely to sign up for smart home services through SELCO, while nearly one-half indicated they would be "not at all likely" to sign up for these services, and 14.6% were unsure. Customers' low likelihood to sign up for smart home services may be due to a lack of knowledge of this technology and how it may be beneficial to them. In order to encourage more customers to sign up for these services, should they be offered, SELCO should consider developing educational materials for customers that detail smart home services, what these entail from an installation standpoint and the benefits of using smart home devices and the added layer of protection they provide. These materials may also explain the different types of smart home services SELCO could offer customers, and the ultimate ease of use and functionality of these devices, as this may be a potential barrier to customers enrolling in smart home services. These materials may help customers become more knowledgeable of this technology and understand its benefits, so that they may be more likely to sign up for smart home services, should they be offered in the future.

Michael Vigeant CEO

MJV@GreatBlueResearch.com

Dan Quatrocelli Senior Director, Research

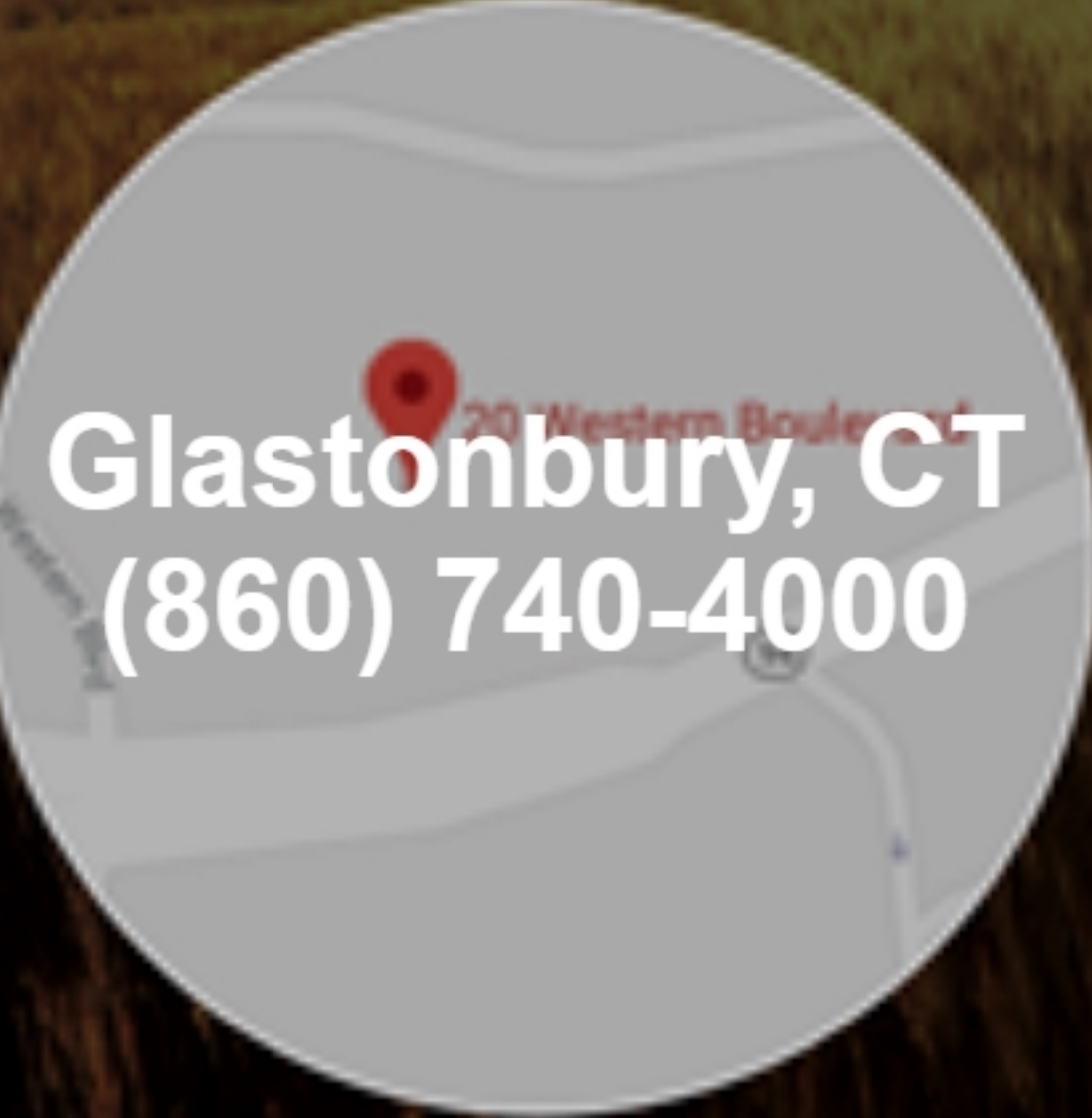
Dan@GreatBlueResearch.com

Courtney Cardillo Research Analyst

Courtney@GreatBlueResearch.com

Cathrine Veschi Project Manager

Catherine@GreatBlueResearch.com

A circular icon containing a map of Glastonbury, CT, with a red location pin.

Glastonbury, CT
(860) 740-4000

A circular icon containing the Facebook logo.

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