



Report of Findings

2025 Broadband & Stream Customer Survey

Table of Contents

Section One

Project Overview

Section Two

Key Study Findings

Section Three

Considerations

Section Four

About GreatBlue

Section Five

Aggregate Data

(Provided Separately)





Research Objectives

- GreatBlue Research was commissioned by Shrewsbury Electric and Cable Operations (hereinafter “SELCO”) to conduct market research to understand their customers' sentiments and perceptions regarding SELCO's streaming and internet service.
- The primary goals for this research study were to assess SELCO streaming and internet customers' current use, satisfaction with current channel offerings and subscription costs, as well as assess sentiments and future intentions regarding various subscription price changes.
- The outcome of this research will enable SELCO to a) more clearly understand current sentiments and perceptions regarding streaming and internet service and subscription pricing, and b) create a strategic roadmap to improving streaming and internet offerings moving forward.



Areas of Investigation

The SELCO 2025 Broadband & Stream Customer Survey leveraged a digital research methodology to address the following areas of investigation:

- **Overall Service Satisfaction & Value:** Customer perceptions of broadband and streaming service quality, reliability, pricing, and overall value.
- **Customer Service & Support Experience:** Satisfaction with customer service, technical support, field interactions, and issue resolution timing.
- **Communication & Engagement Preferences:** Effectiveness of SELCO communications, digital tools, and preferred channels for support and service information.
- **Streaming TV Experience & Retention:** Satisfaction with Stream TV content, features, value, likelihood to recommend, and drivers of retention or cancellation.
- **Internet & In-Home Wi-Fi Performance:** Evaluation of internet speeds, reliability, outage expectations, Wi-Fi coverage, and recommendation likelihood.
- **Future Services, Bundling & Smart Home Needs:** Interest in bundled services, awareness and demand for WiFi/Mesh WiFi, and expectations for smart home and network support.

Research Methodology Snapshot

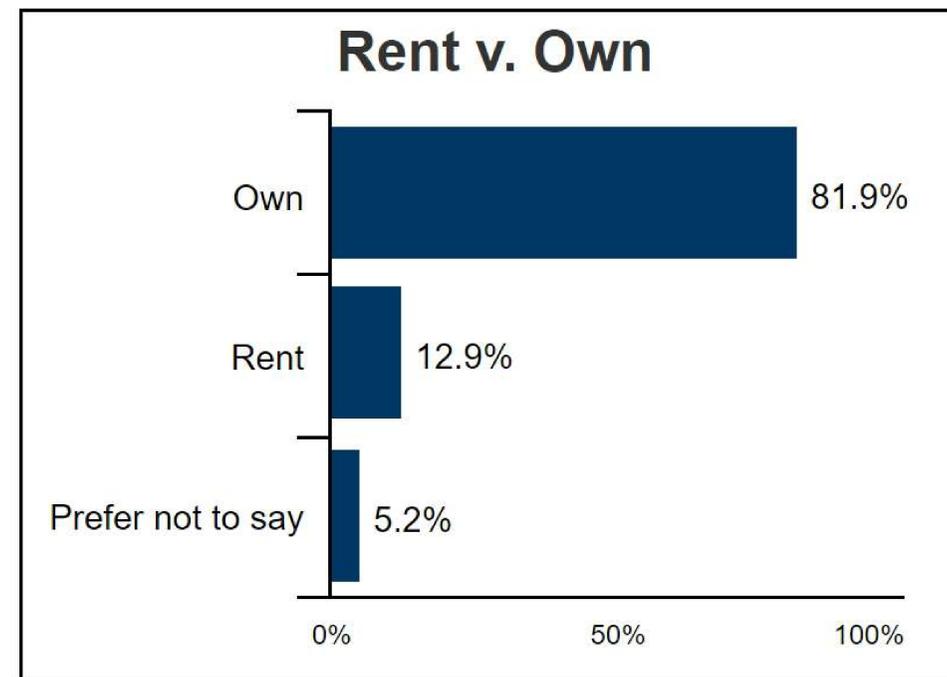
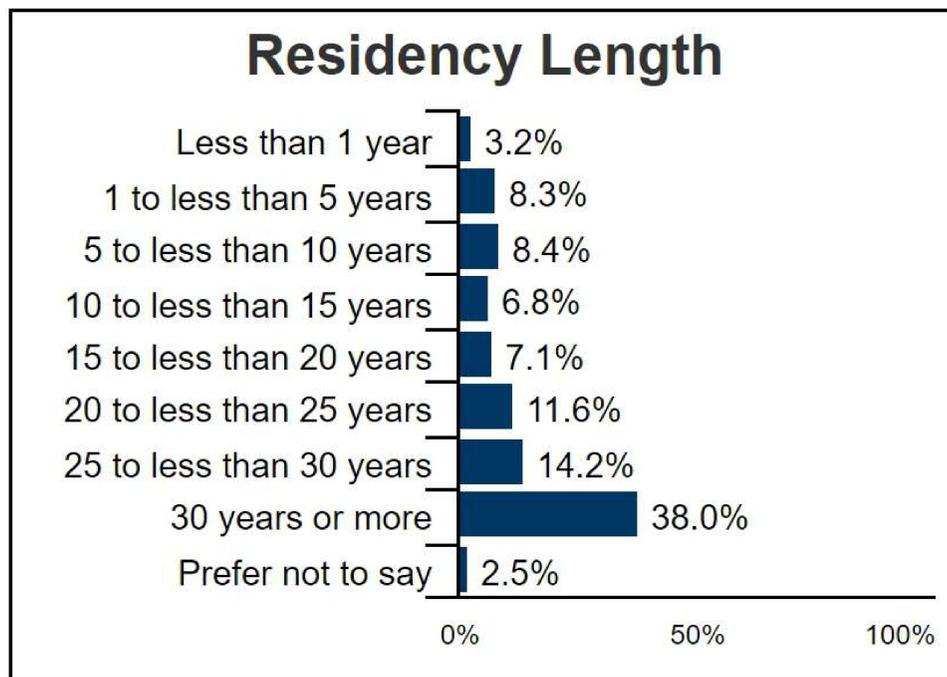
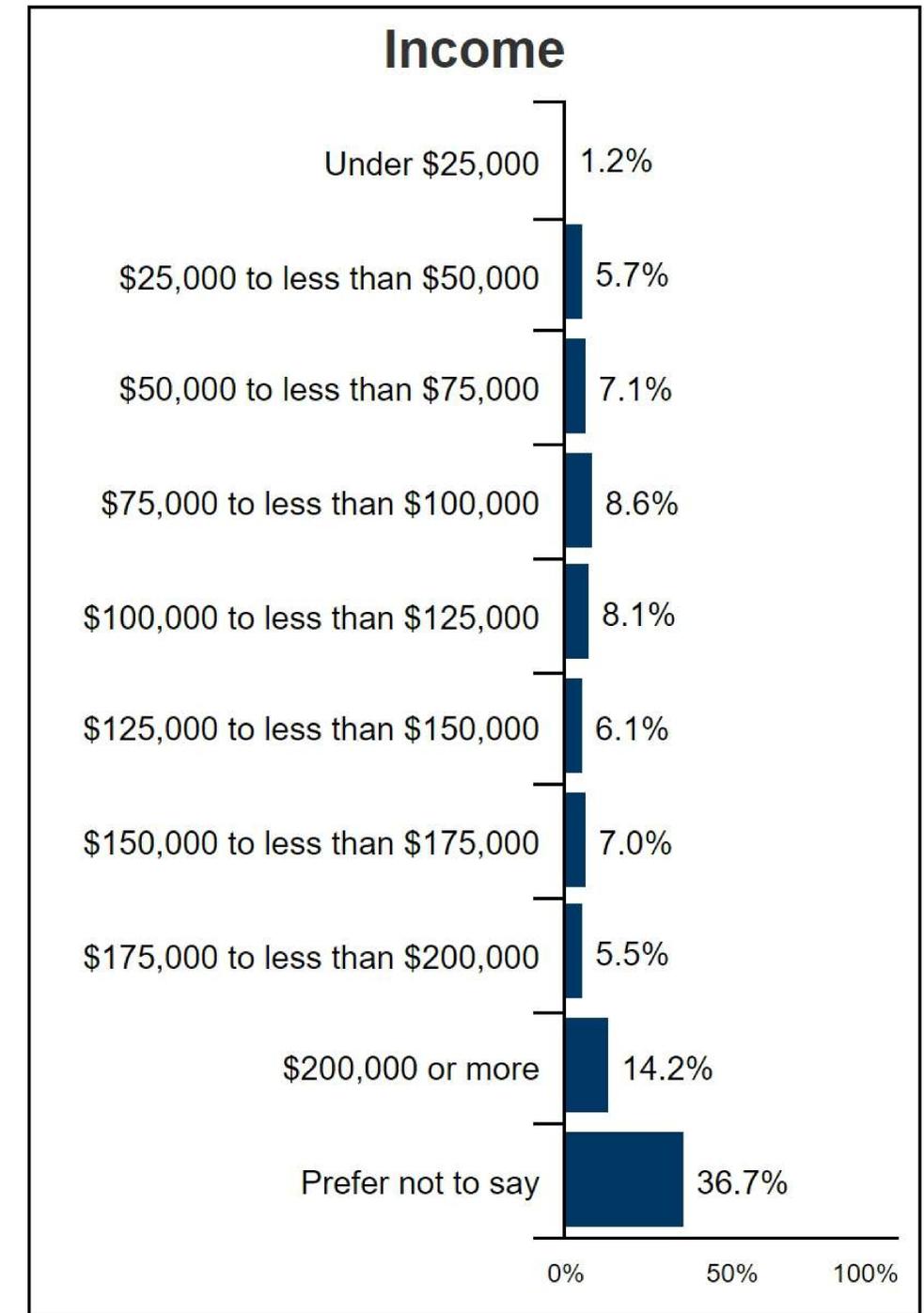
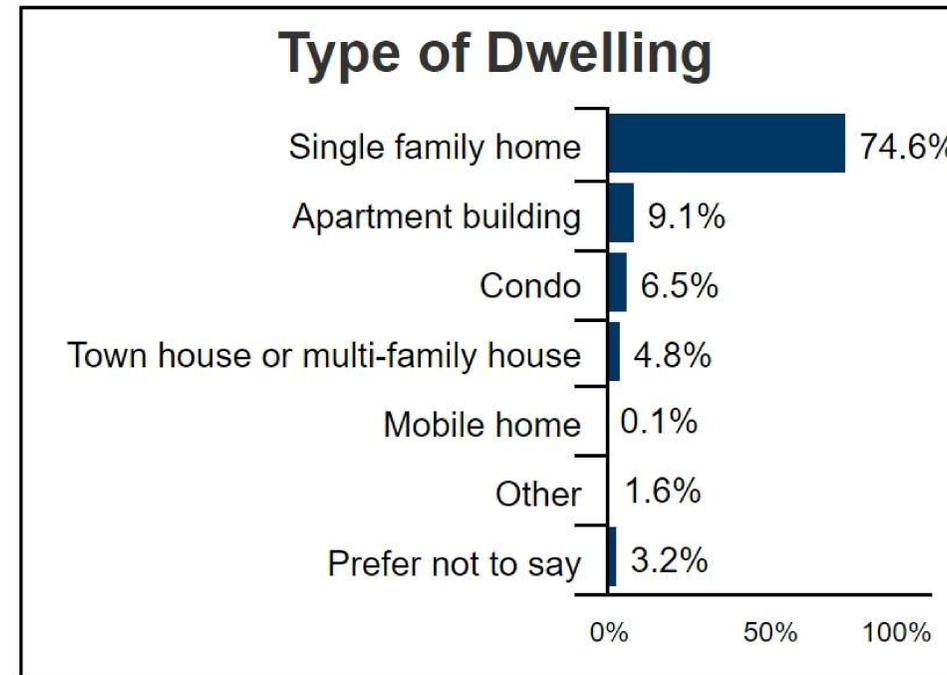
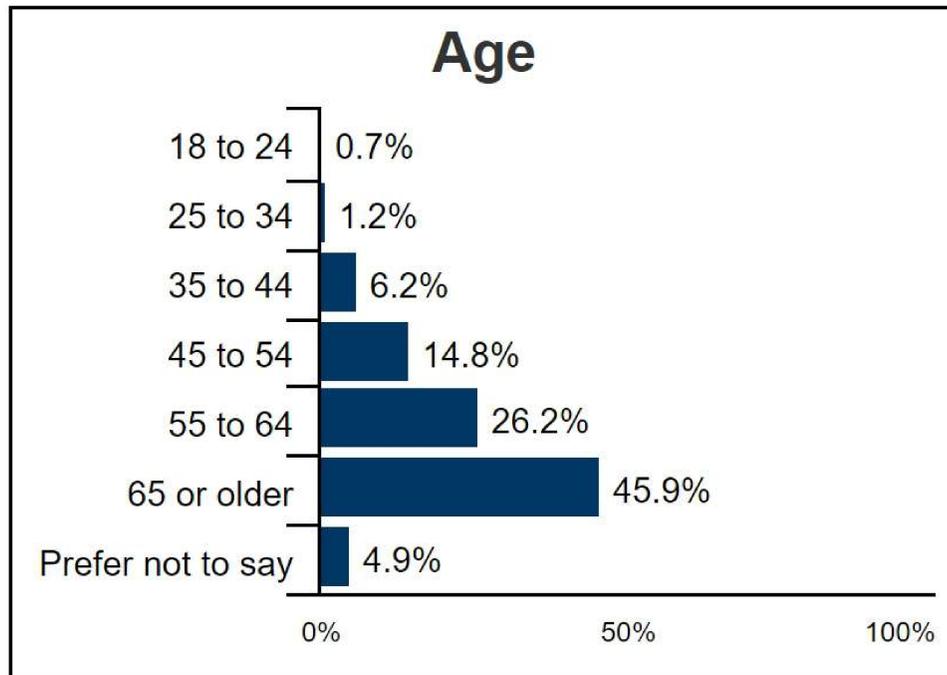


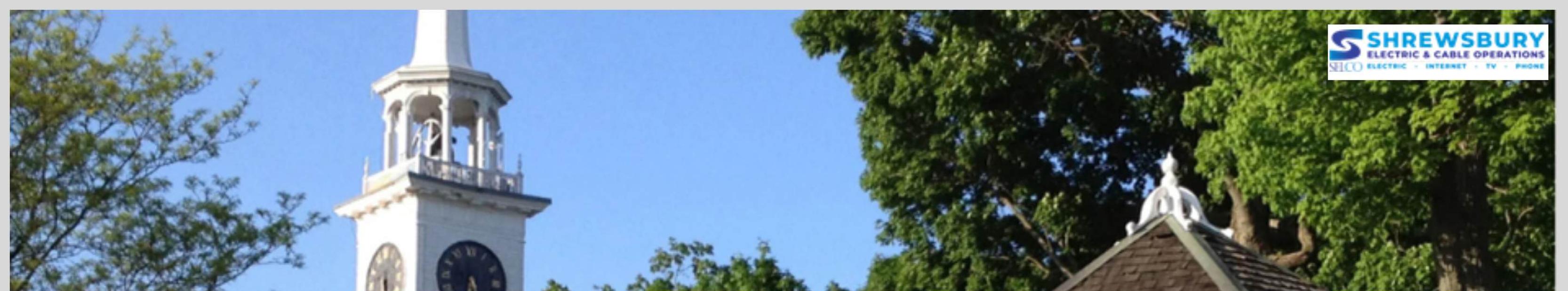
Methodology Digital	No. of Completes 690	No. of Questions 46*	Incentive None	Sample Customer List
Target Residential Streaming & Internet Customers	Quality Assurance Dual-level**	Margin of Error +/- 3.61%	Confidence Level 95%	Research Dates November 17 - December 16, 2025

* 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 a computer-aided interviewing platform, ensure the integrity of the data is accurate.

Respondent Profile | Demographics





Key Study Findings



Key Study Findings



Overall Satisfaction & Service Perceptions

- Customers provided an average positive rating of 66.9% for SELCO's broadband division in 2025, a significant decline from 2021 (-10.8 percentage points), driven largely by decreases in streaming quality and reliability (-39.5 percentage points) and rates for streaming service (-18.1 percentage points). Of note, these questions measured SELCO's cable service in 2021, as opposed to its streaming service.
- Among customers providing poor ratings, over seven-out-of-ten (71.0%) cited poor reception quality, followed by high rates (26.8%).
- Just over half of customers (51.6%) reported no change in service quality and that service remains good, a significant decrease from 2021 (-13.8 percentage points), while significantly more customers reported service quality has worsened (+16.2 percentage points).
- Significantly more SELCO Stream customers reported worsening service quality compared to Internet (+12.1 percentage points) and Phone customers (+7.6 percentage points).

Customer Service, Communication & Engagement

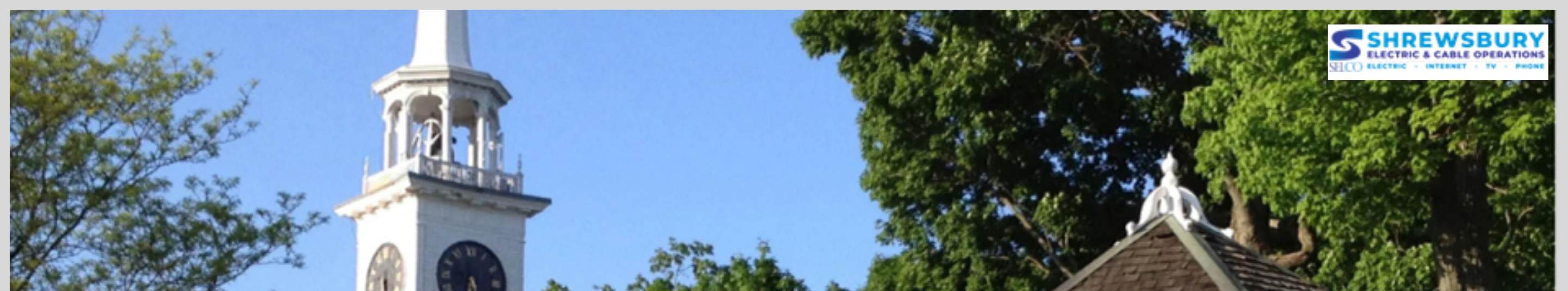
- Among customers who have interacted with SELCO in the past year, approximately nine-out-of-ten reported satisfaction with that interaction, with the highest satisfaction among those interacting with a SELCO field representative during a home visit (95.3%).
- More than three-quarters of customers who experienced a TV or internet issue (76.4%) were satisfied with SELCO's response time.
- Roughly eight-out-of-ten customers (79.8%) found SELCO's website and online tools helpful, while three-quarters (75.5%) preferred phone-based technical support.
- E-mail was the most preferred channel for receiving product and service information (66.7%), and over one-half of customers (56.7%) preferred speaking with a representative when ordering products or services.

Streaming TV Customer Experience

- Over three-fifths of SELCO Stream customers (61.4%) were satisfied with their TV package, representing a significant decrease from 2021 (-22.2 percentage points), despite strong satisfaction with content variety (84.4%).
- Over one-third of customers (36.3%) rated SELCO Stream as a good or excellent value, while nearly three-fifths (59.2%) rated its value as fair or poor.
- Over three-fifths of customers (62.2%) do not plan to cancel their Stream TV service in the next 12 months; however, the percentage of customers who may cancel increased significantly from 2021 (+10.3 percentage points).

Internet Experience, Usage & Future Services

- Internet satisfaction remains strong, with nine-out-of-ten customers (90.6%) satisfied overall and a similar percentage (90.6%) reporting that internet speeds meet their household needs.
- Awareness of SELCO's WiFi product was high, with roughly eight-out-of-ten customers reporting awareness (79.9%), though awareness of Mesh WiFi was lower, with nearly one-third (30.8%) reporting being very unaware.
- One-quarter of customers (25.6%) were likely to sign up for Mesh WiFi through SELCO, while nearly three-out-of-ten (29.0%) were unsure.



Rating the Utility

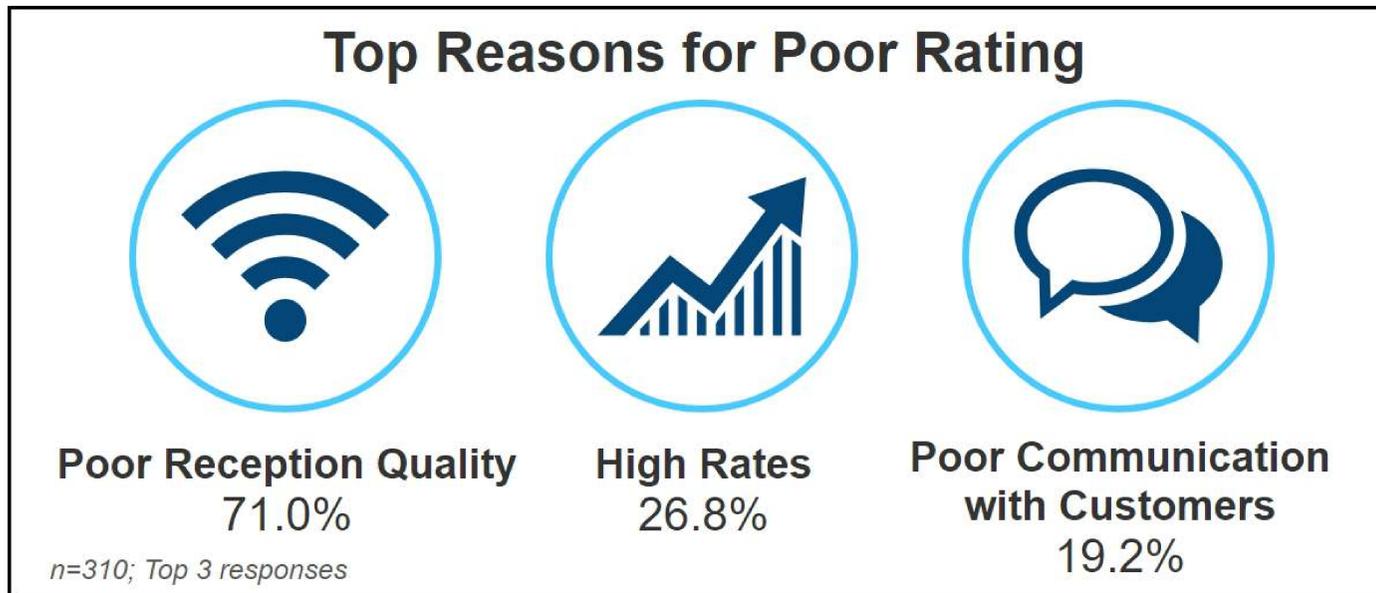
Satisfaction with Service & Communication



Satisfaction | Organizational Characteristics

In 2025, customers provided an average positive rating of 66.9% on a series of organizational characteristics regarding their experience with SELCO's broadband division, a significant decrease compared to 2021 (-10.8 percentage points). This was driven by significant decreases in the "quality and reliability of streaming services" they receive (-39.5 percentage points) and the "rates for streaming service" (-18.1 percentage points). Of note, these questions measured SELCO's cable service in 2021, as opposed to its streaming service.

Further, over seven-out-of-ten customers cited "poor reception quality" as their reason for providing a poor rating, followed by over one-quarter who cited "high rates."



	2021	2025
<i>Aggregate of ratings 7-10 w/o "don't know" responses</i>		
Helpful and knowledgeable staff	87.5%	87.2%
Communicating with customers	83.3%	79.7%
*Quality and reliability of internet service	76.9%	75.0%
Variety of service offerings	74.0%	70.8%
Rates for internet service	-	68.4%
*Rates for streaming service	66.7%	48.6%
Quality and reliability of streaming service	77.9%	38.4%
Average	77.7%	66.9%

n=518 (2023), 690 (2025)

Q: For the questions below, please rate your experience with SELCO's Broadband division (TV & internet). Please use a scale of one to ten where one (1) is very poor and ten (10) is very good.

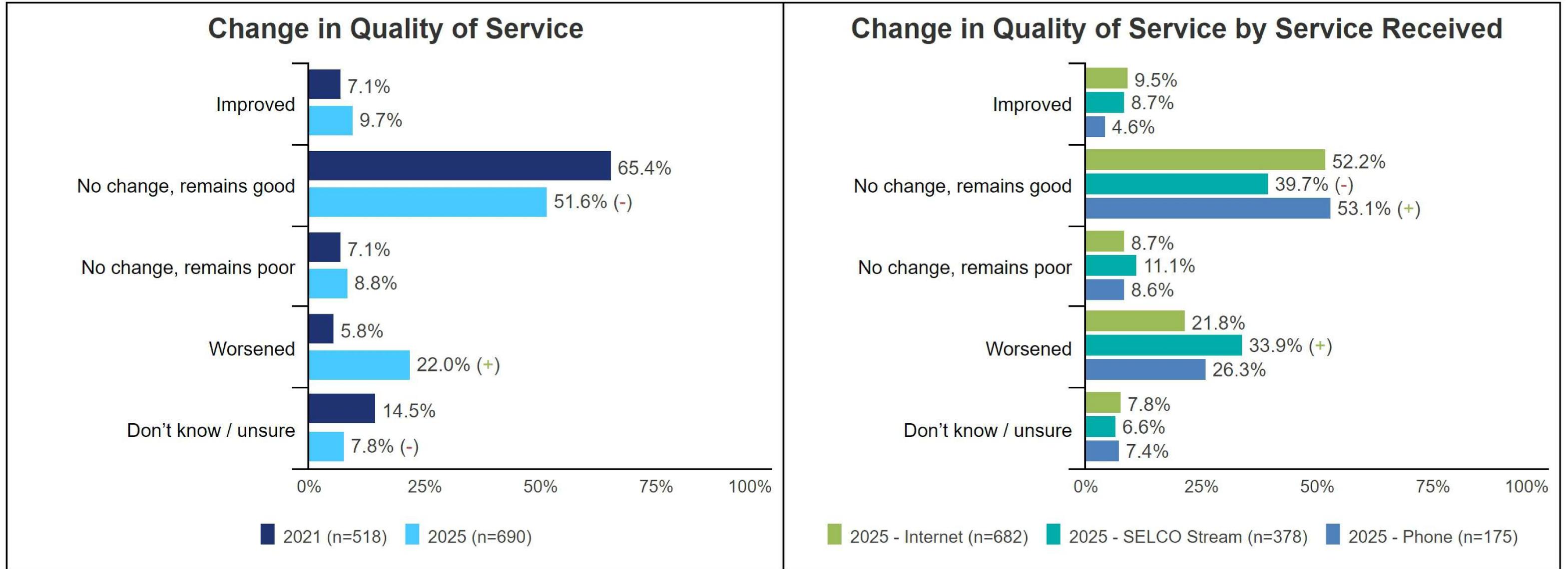
Q: Why did you provide a poor rating for SELCO?

Red/green coloring indicates statistical significance at a 95% confidence level compared to 2021 data

**These characteristics measured satisfaction with Cable in 2021*

Satisfaction | Quality of Service

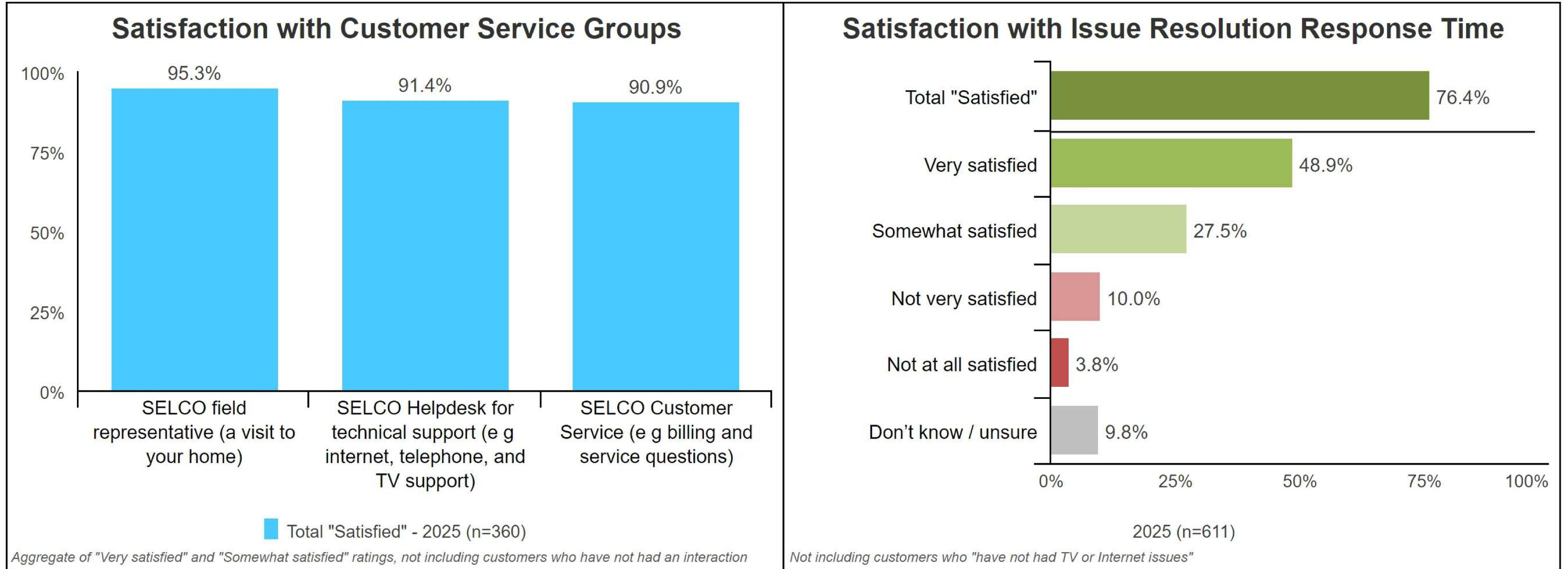
Over one-half of customers reported there was no change in the overall quality of service, and service remains good, a significant decrease compared to 2021 (-13.8 percentage points). Significantly more customers reported that the quality of service "worsened" compared to 2021 (+16.2 percentage points). Of note, significantly more SELCO Stream customers reported that the quality of service worsened compared to Internet (+12.1 percentage points) or Phone customers (+7.6 percentage points).



[service_changes]: Over the past year, have you perceived any differences in the overall quality of service provided by SELCO?
 (+/-) indicates statistical significance at a 95% confidence level compared to 2021 data

Satisfaction | Customer Service

Of customers who had an interaction with SELCO, at least nine-out-of-ten reported being satisfied with the customer service group they interacted with. Satisfaction was highest among those who interacted with a SELCO field representative during a home visit. Additionally, more than three-quarters of customers who experienced a TV or internet issue reported being satisfied with SELCO's response time in resolving the issue, with nearly one-half being "very satisfied."

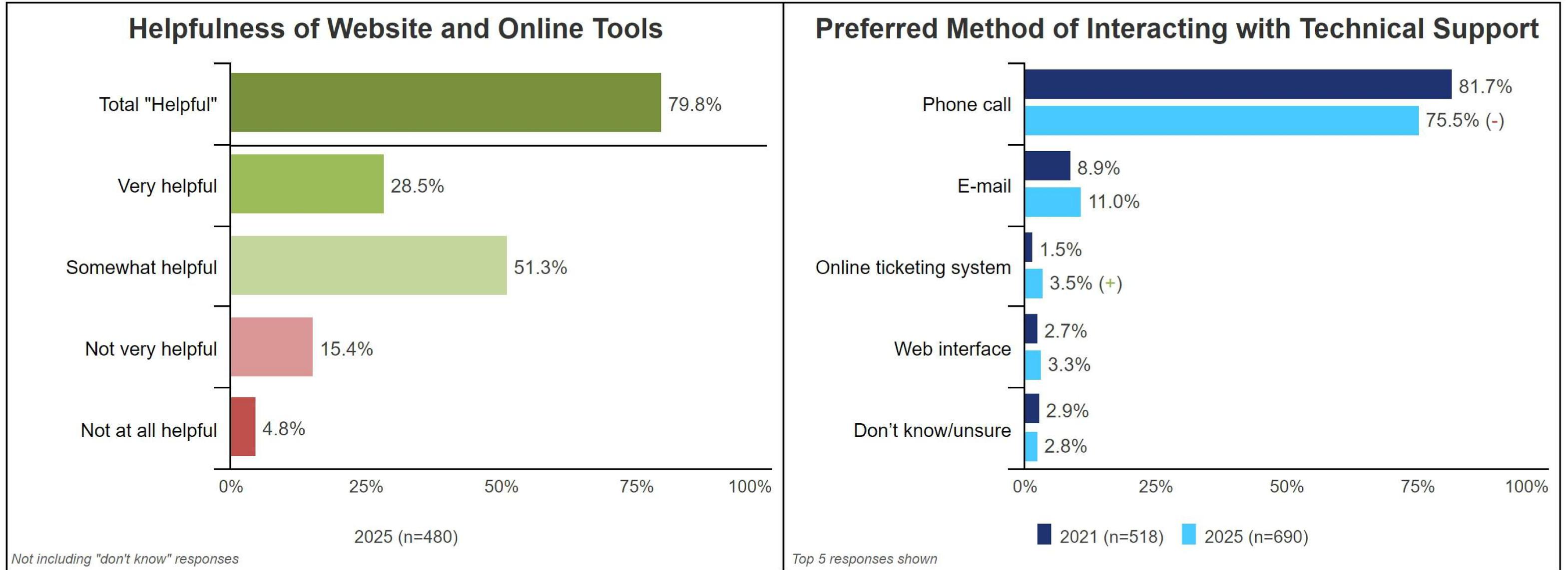


[contact_satisfaction]: If you have had an interaction with any of the following employee groups regarding your TV or Internet service over the past year, please rate your satisfaction with that interaction

[response_time]: How satisfied are you with SELCO's response time when resolving TV or internet issues?

Satisfaction | Website & Online Tools

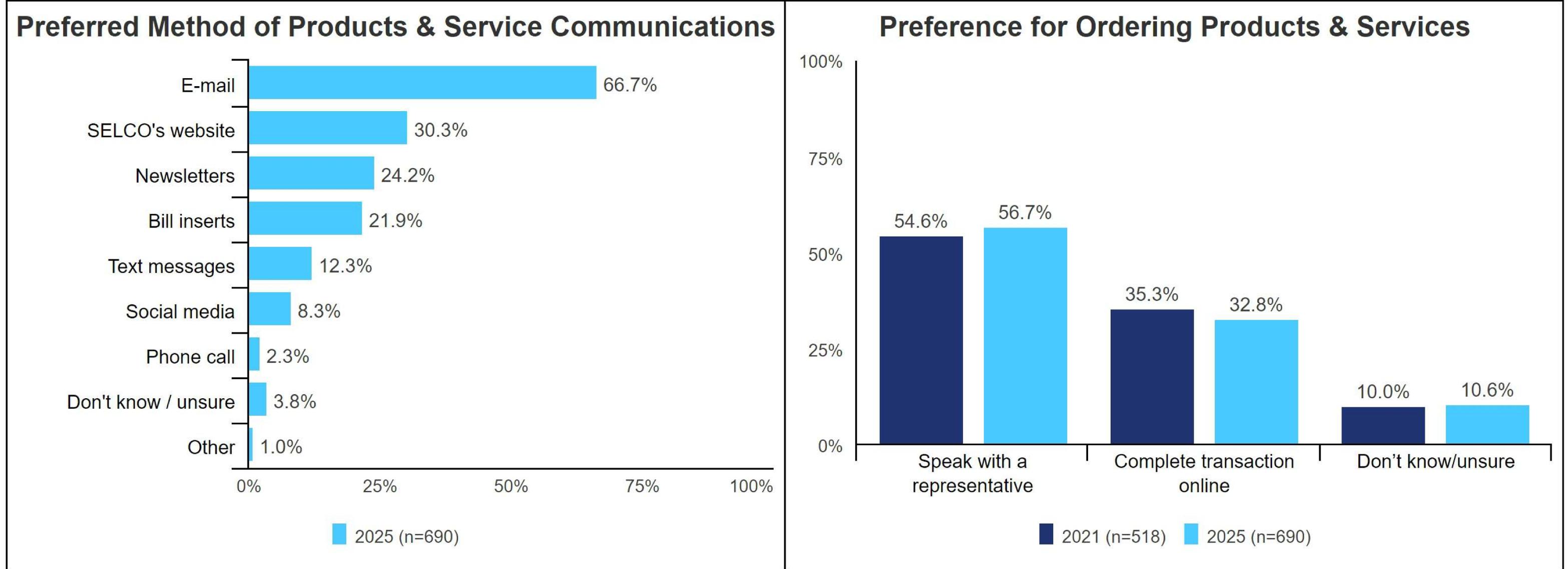
Roughly eight-out-of-ten customers found SELCO's website and online tools to be helpful, while over one-half reported they are only "somewhat helpful." Further, three-quarters of customers would prefer to interact with SELCO's technical support through a "phone call," followed by a significant margin by those who prefer to interact over "email."



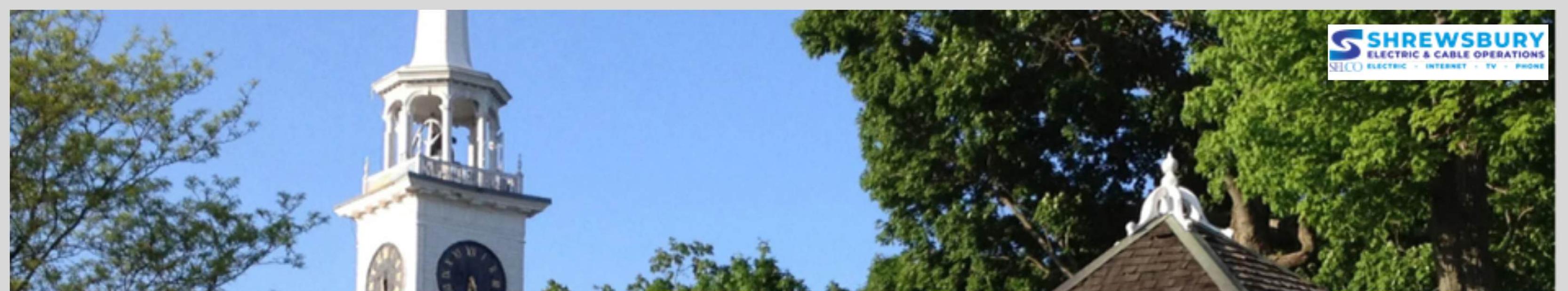
[website_helpfulness]: How helpful do you find SELCO's website and online tools (FAQs, troubleshooting guides, account portal)?
 [technical_support_preferred_method]: What would be your preferred method of interacting with SELCO's technical support?
 (+/-) indicates statistical significance at a 95% confidence level compared to 2021 data

Satisfaction | Product & Service Communication

Two-thirds of customers preferred to hear about SELCO product and service offerings through "E-mail," followed by nearly one-third who would prefer to hear about them on "SELCO's website." When ordering products and services from SELCO, over one-half of customers preferred to complete the transaction by "speaking with a representative," while nearly one-third preferred to "complete [the] transaction online."



*[product_package_updates]: When you are ordering products or services, do you typically prefer to order online to complete the transaction, or would you prefer to directly speak with a customer service representative?
 [product_service_information]: How would you prefer to hear about product and service offerings from SELCO? (Select all that apply)*



Customer Experience

SELCO Stream TV

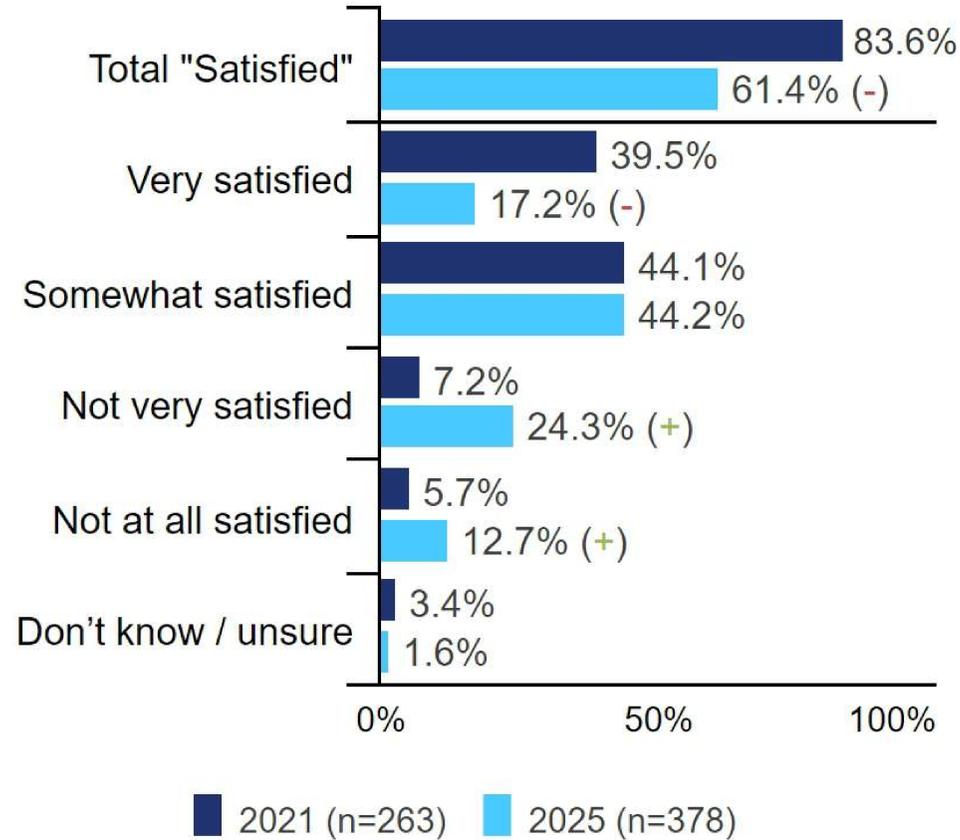


Streaming TV | Satisfaction with Services

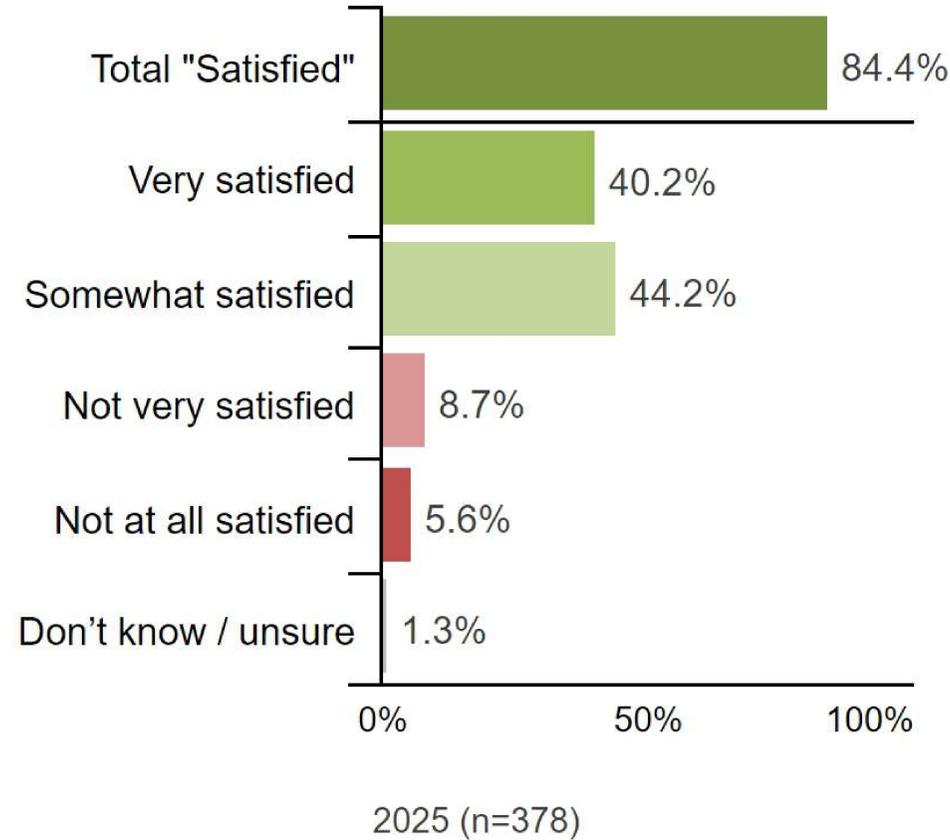
Over three-fifths of SELCO Stream customers were satisfied with their current TV package, a significant decrease compared to 2021 (-22.2 percentage points). However, over eight-out-of-ten customers were satisfied with the variety of channels and content included in their TV package. Of the customers who use SELCO Stream's Cloud DVR Recording and On-demand features, nearly three-quarters were satisfied with these features.

Satisfaction with SELCO TV Services

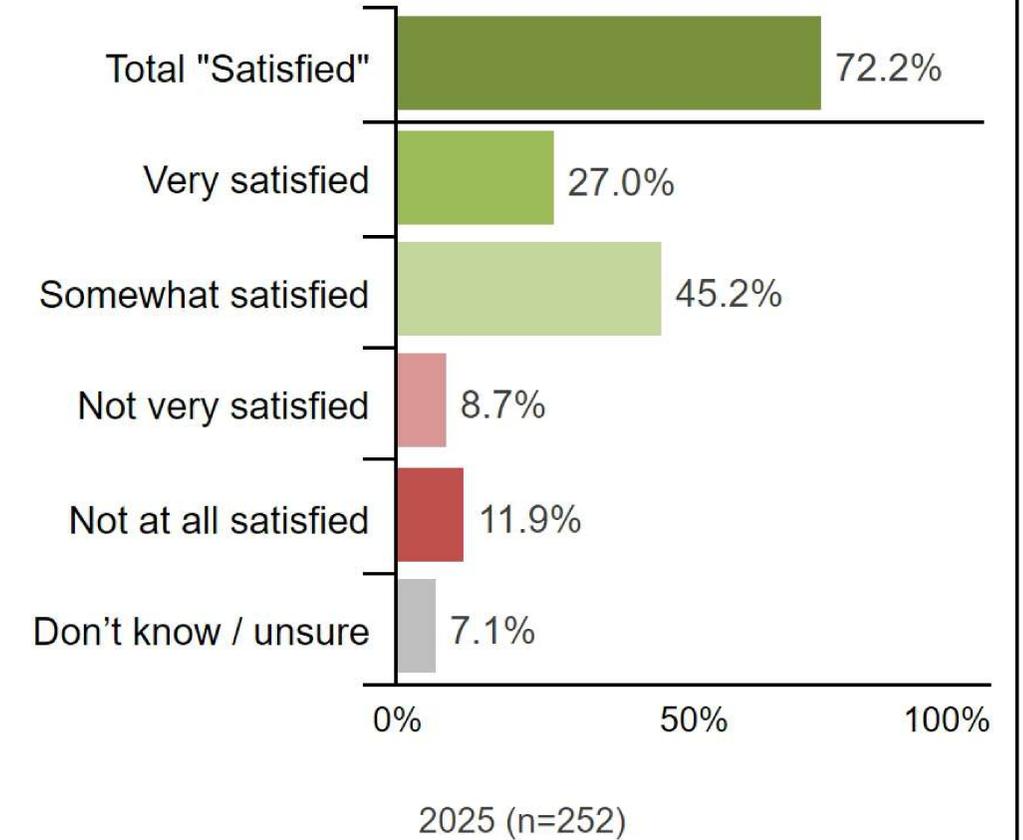
Satisfaction with Current TV Package



Satisfaction with Channels & Content Included in TV Package



Satisfaction with Cloud DVR Recording & On-Demand Features



Not including customers who do not use these features

[TV_satisfaction]: Overall, how satisfied are you with the current SELCO Stream TV package you receive from SELCO? Would you say...

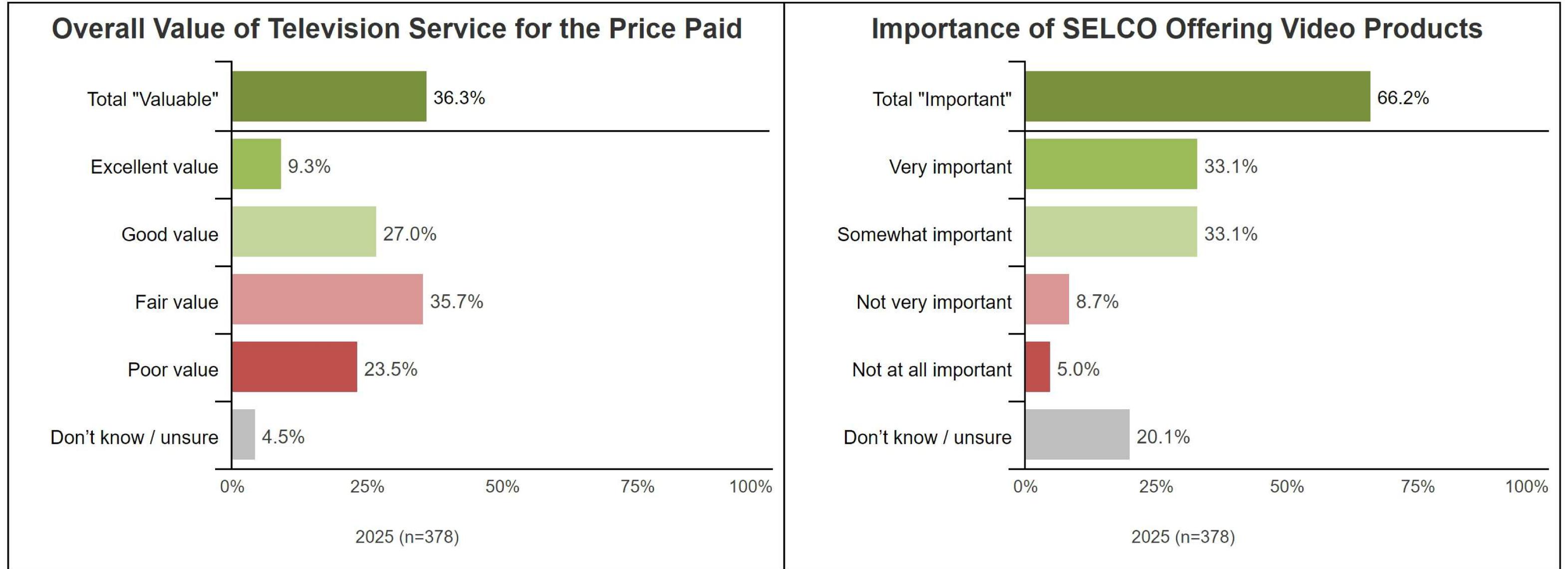
[content_variety_satisfaction]: How satisfied are you with the variety of channels and content included in your SELCO Stream TV package (e.g., sports, news, local programming)?

[on_demand_satisfaction]: How satisfied are you with SELCO Stream's Cloud DVR Recording and On-Demand features?

(+/-) indicates statistical significance at a 95% confidence level compared to 2021 data

Streaming TV | Importance & Value

Nearly two-fifths of customers find their SELCO Stream television service to be of "excellent" or "good" value for the price they pay, while nearly three-fifths (59.2%) rated the overall value as either "fair" or "poor." Two-thirds of customers reported that it is important for SELCO to continue to offer video products to customers, while one-fifth were unsure.

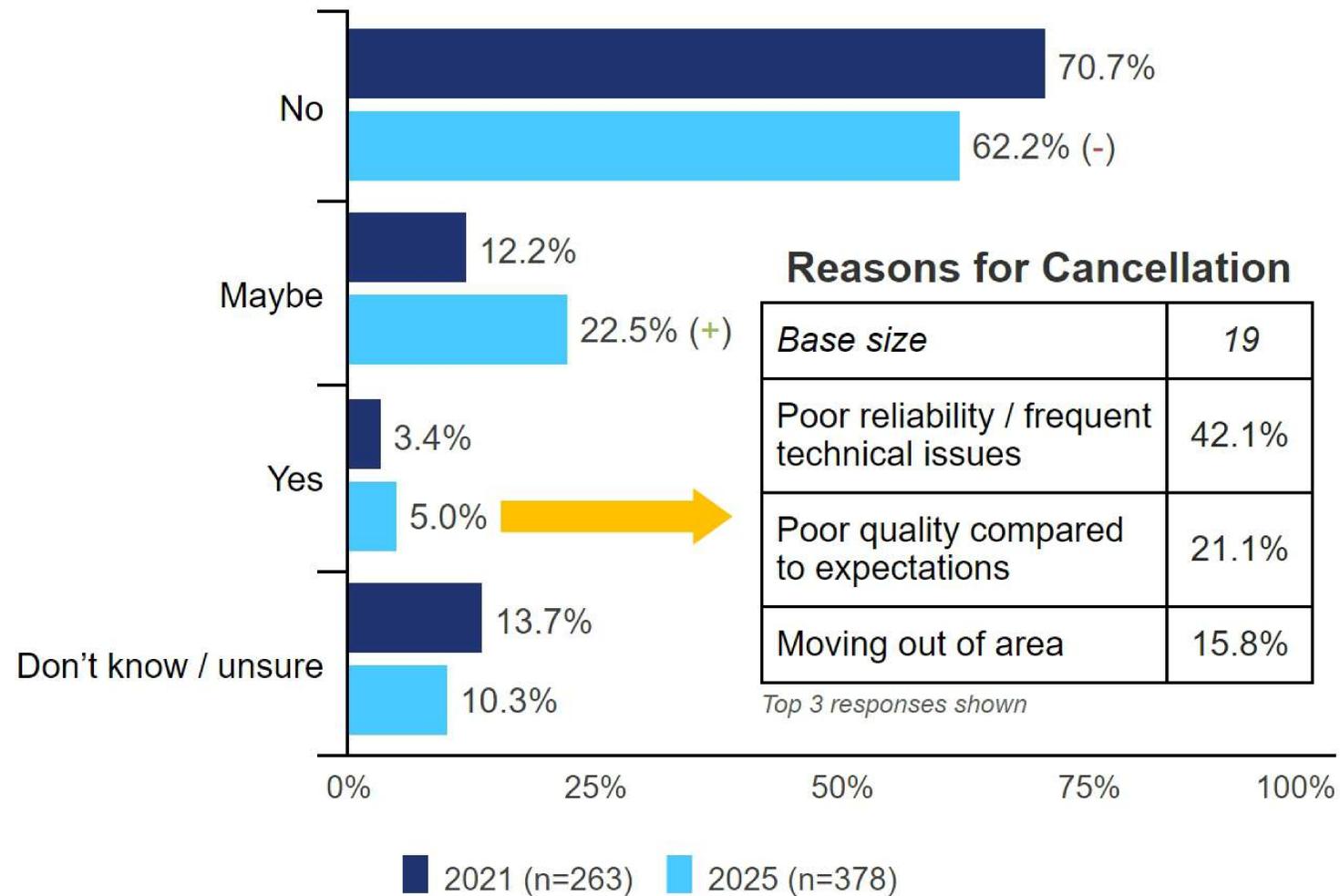


[TV_value]: How would you rate the overall value of your SELCO Stream television service for the price you pay?
[importance_video_offerings]: How important is it to you for SELCO to continue offering video products to customers?

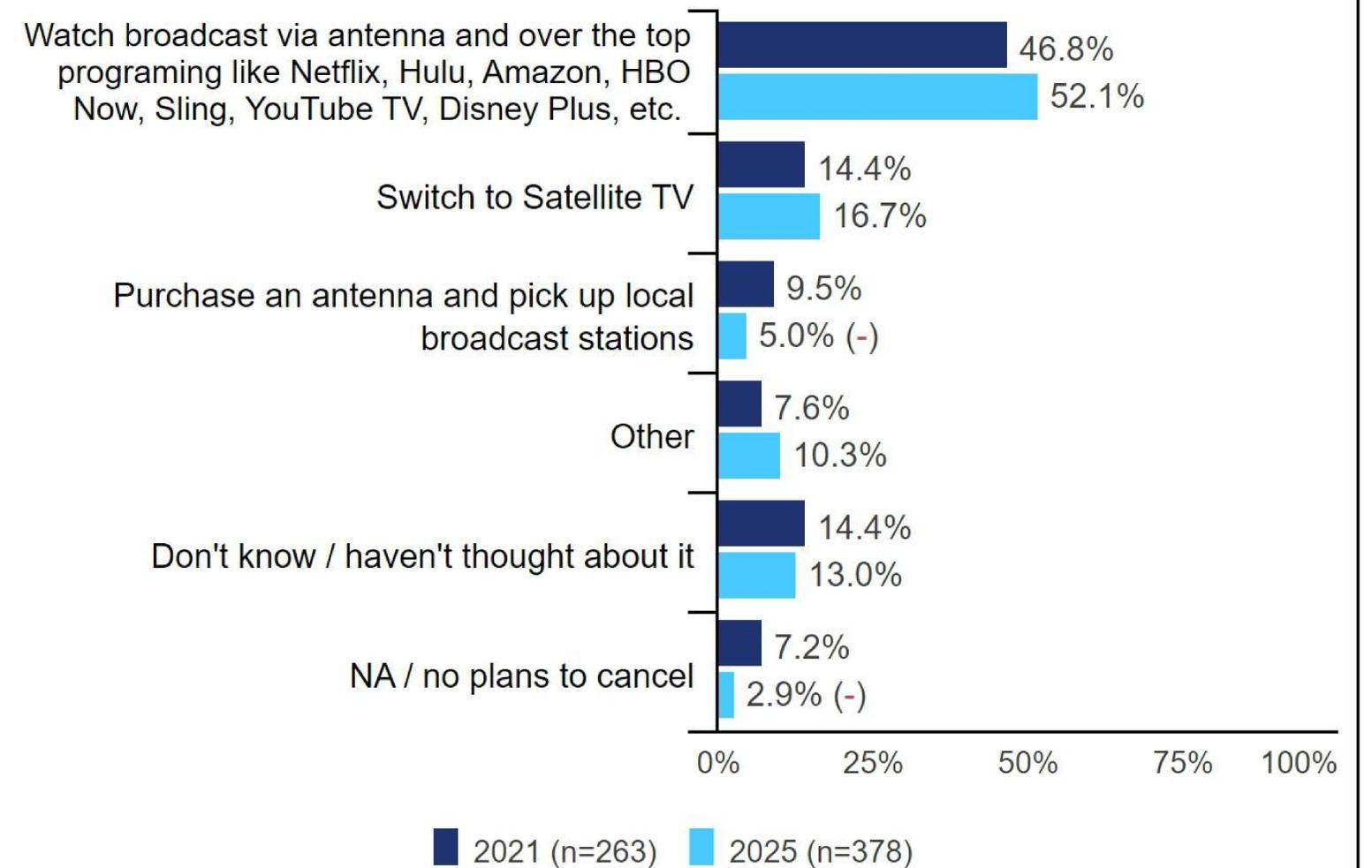
Streaming TV | Likelihood to Keep Subscription

Over three-fifths of SELCO Stream customers are not likely to cancel their television subscription in the next 12 months, while nearly one-quarter of customers would "maybe" cancel, an increase compared to 2021 (+10.3 percentage points). If customers were to cancel their SELCO Stream TV subscription, over one-half would "watch broadcast via antenna and over-the-top programming."

Likelihood to Cancel TV Subscription in the Next Year



Preferred TV Subscription Alternative



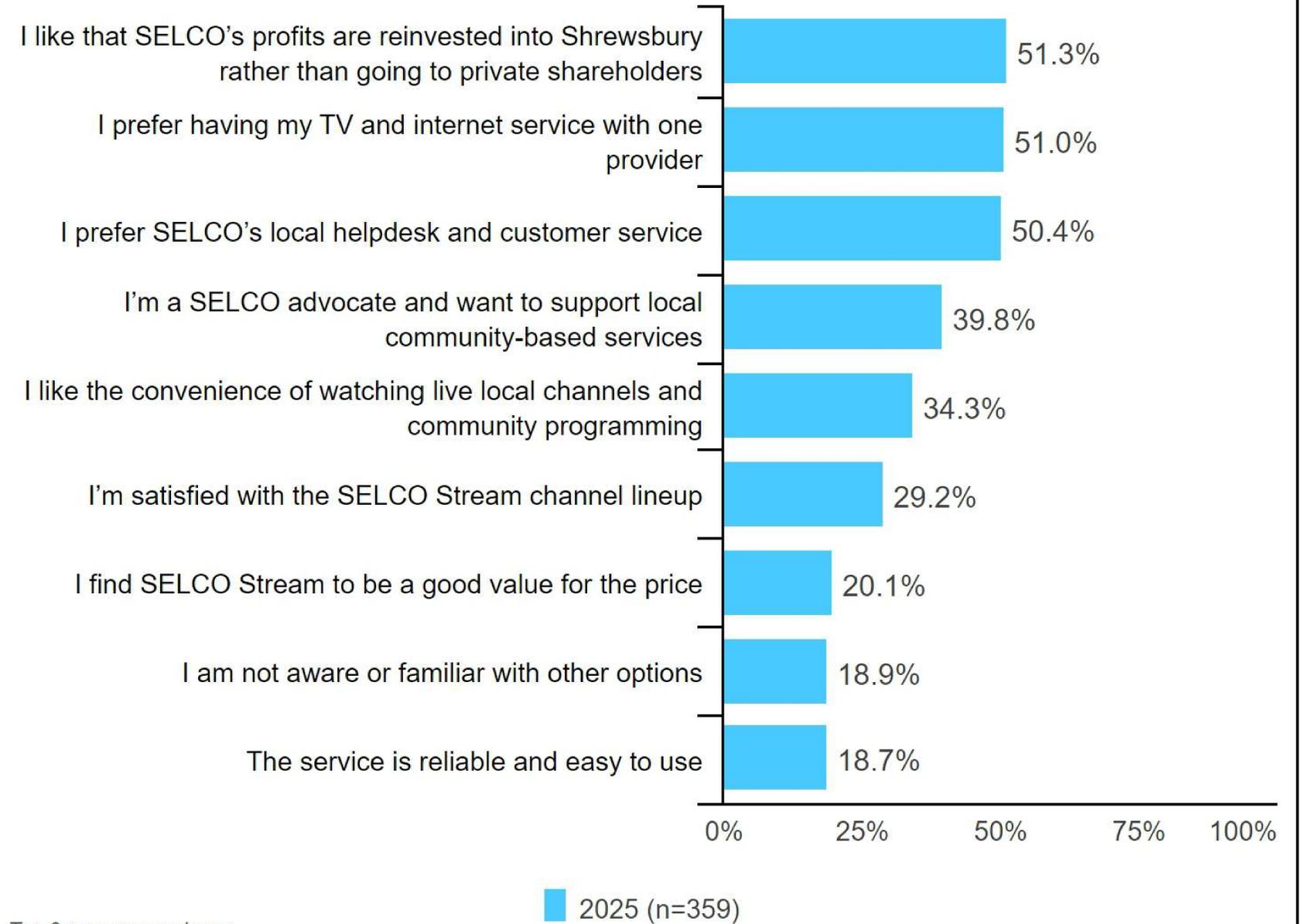
[cancelling_TV]: In general, do you have any plans to cancel your SELCO television subscription in the next 12 months?
 [cancelling_TV_reason]: For what reason(s) are you planning to cancel your SELCO Stream television subscription?
 [cancel_TV_alternative]: If you were to cancel your SELCO Stream TV subscription, which of the following options would you pursue....
 (+/-) indicates statistical significance at a 95% confidence level compared to 2021 data

Streaming TV | Reasons to Keep TV Service

Of the customers who do not plan on cancelling their SELCO Stream TV service in the next 12 months, one-half indicated this is because they "like that SELCO's profits are reinvested into Shrewsbury rather than going to private shareholders," they "prefer having my TV and internet service with one provider" and/or they "prefer SELCO's local helpdesk and customer service."

Of note, nearly two-fifths of customers reported they do not plan to cancel their SELCO Stream TV because they are "a SELCO advocate and want to support local community-based services."

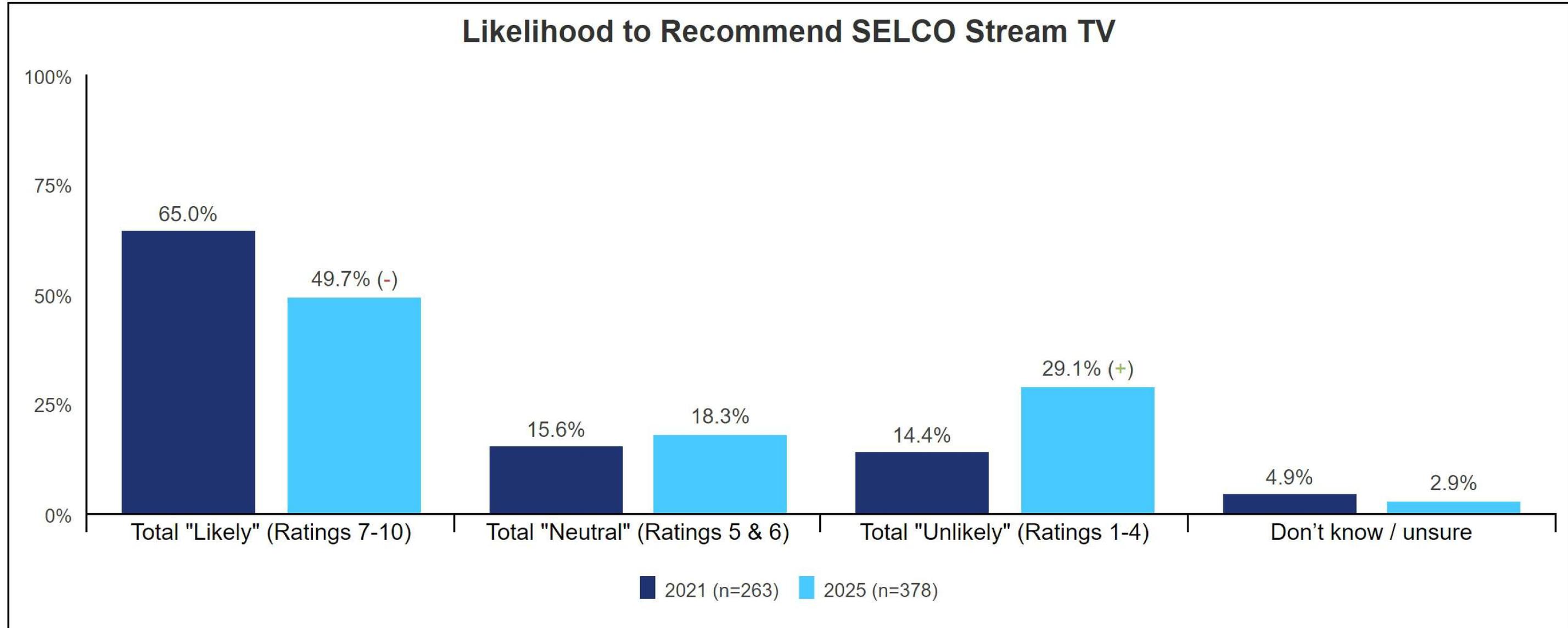
Main Reasons to Keep SELCO Stream TV Service



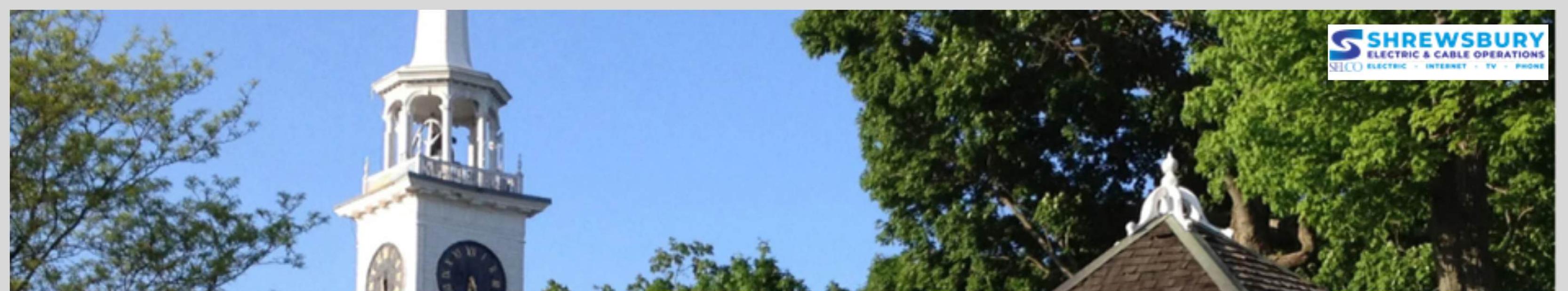
[product_service_information]: What are the main reasons you choose to keep your SELCO Stream TV service? (Select all that apply)

Streaming TV | Likelihood to Recommend

Nearly one-half of SELCO Stream TV customers would be likely to recommend the TV service to a friend or colleague, a significant decrease compared to 2021 (-15.3 percentage points). Conversely, over one-quarter of customers would be unlikely to recommend the TV service, which was a significant increase compared to 2021 (+14.7 percentage points).



*[likelihood_recommend_TV]: On a scale of 1 to 10, where 1 is very unlikely and 10 is very likely, how likely is it that you would recommend SELCO Stream TV service to a friend or colleague?
(+/-) indicates statistical significance at a 95% confidence level compared to 2021 data*



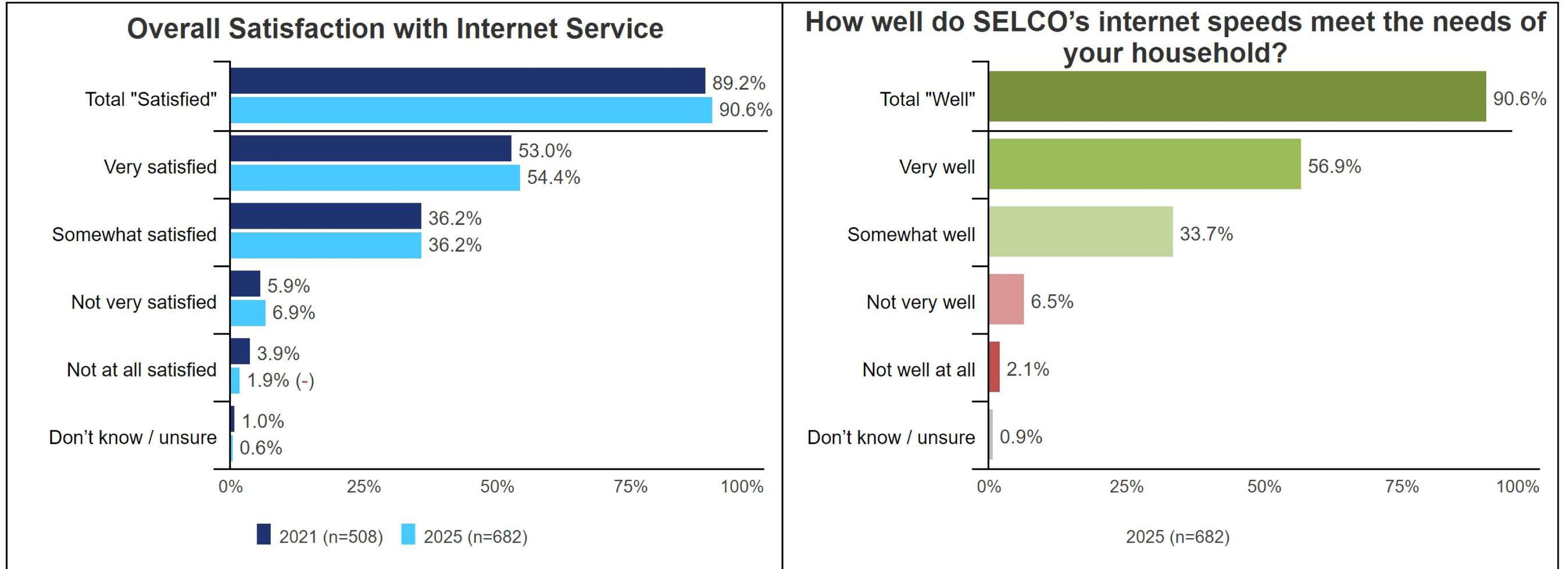
Customer Experience

SELCO Internet



Internet | Overall Satisfaction

Nine-out-of-ten SELCO Internet customers were satisfied with the internet service they received, including over one-half who were "very satisfied." Similarly, nine-out-of-ten customers felt that SELCO's internet speeds meet the needs of their household (e.g., work-from-home, gaming, streaming), including over one-half who reported that it meets their needs "very well."



[internet_satisfaction]: Overall, how satisfied are you with SELCO's internet service?

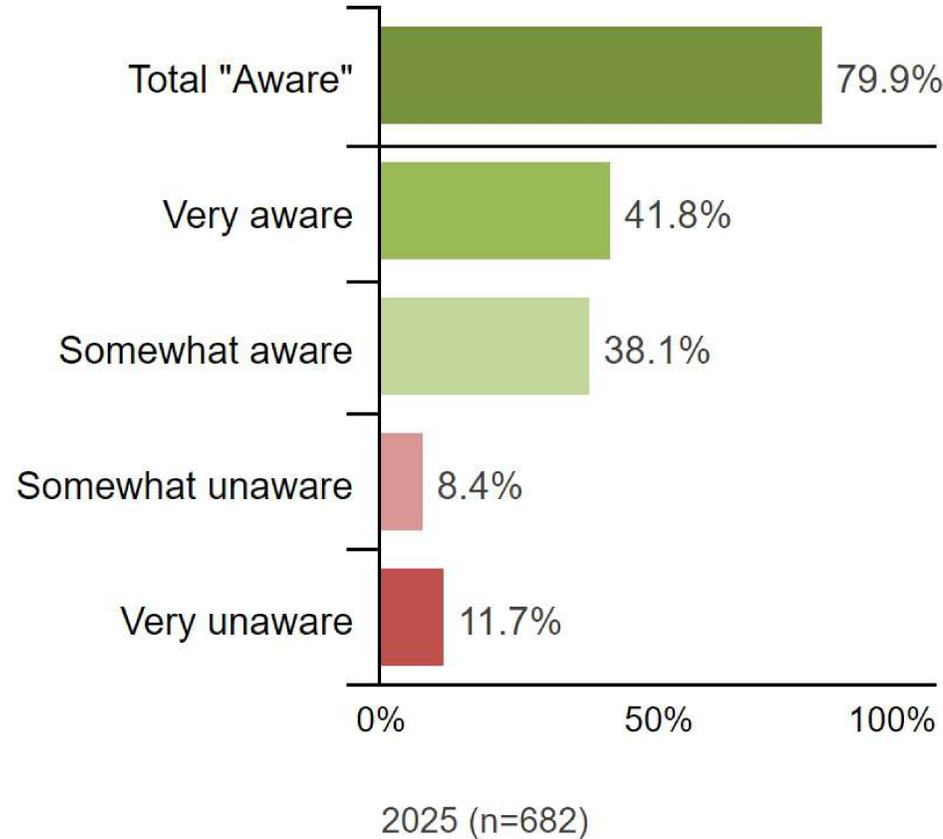
[internet_speeds]: How well do SELCO's internet speeds meet the needs of your household (e.g., work-from-home, gaming, streaming)?

Internet | Awareness of WiFi Products

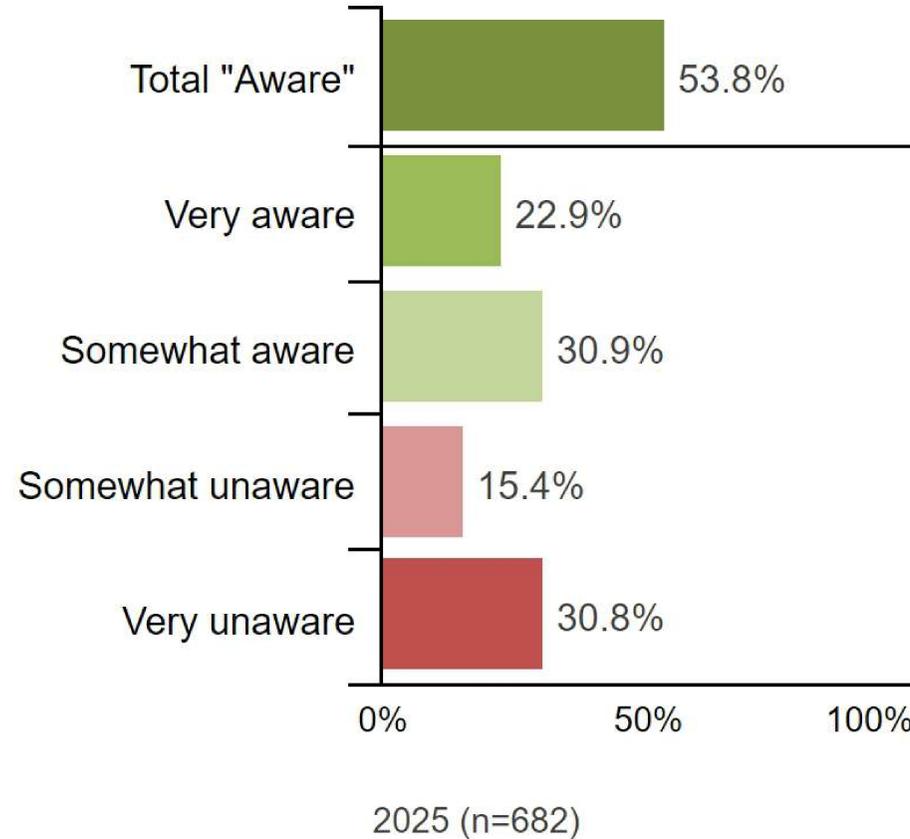
Roughly eight-out-of-ten internet customers were aware of SELCO's WiFi product, while just over half were aware that SELCO offers a Mesh WiFi product. However, three-out-of-ten customers reported being "very unaware" of the Mesh WiFi offering. Among customers who were aware of SELCO's WiFi products, more than three-fifths were aware that SELCO's WiFi product allows HelpDesk support to remotely troubleshoot connectivity issues.

Awareness of SELCO Internet Services

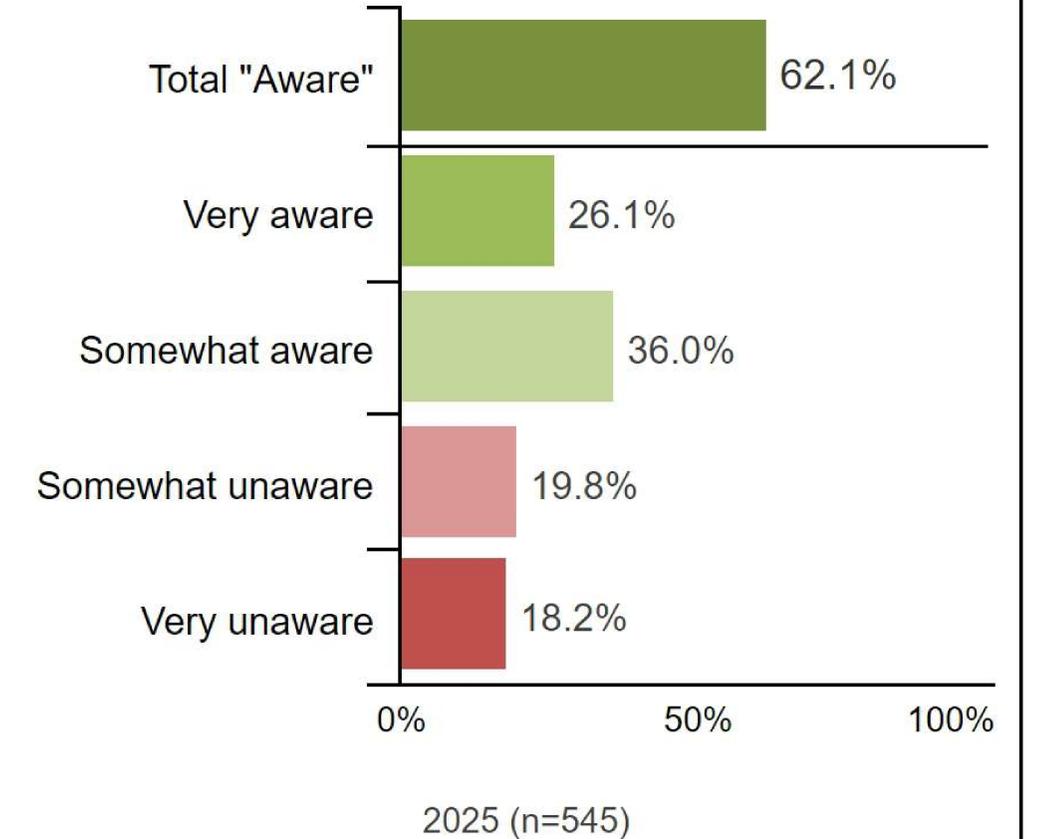
Awareness of SELCO WiFi Product



Awareness of SELCO Mesh WiFi Product



Awareness of HelpDesk Remote Assistance Capabilities Included with WiFi Product



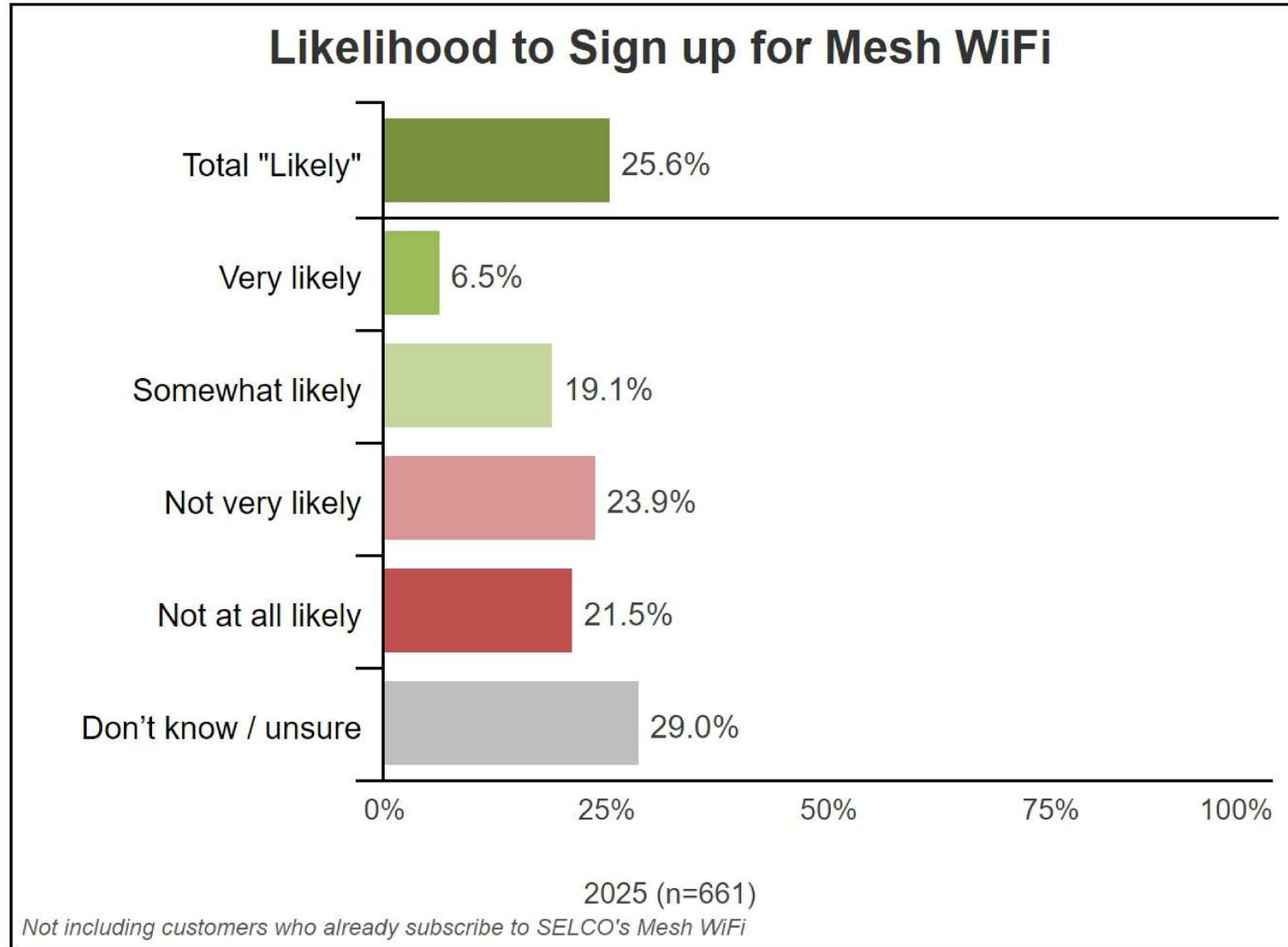
Only asked to customers who were aware of SELCO's WiFi product

[wifi_awareness]: Prior to this survey, how aware were you of SELCO's WiFi product?

[mesh_wifi_awareness]: Prior to this survey, how aware were you that SELCO offers a Mesh WiFi product, which includes better internet connections to all your wireless devices?

[mesh_wifi_troubleshooting]: How aware were you that SELCO's WiFi product allows its HelpDesk support to be able to better troubleshoot connectivity issues by allowing the ability to view and log in to devices remotely?

One-quarter of internet customers reported being likely to sign up for SELCO's Mesh WiFi, while more than two-fifths (45.4%) indicated they are not likely to sign up. Notably, more than one-quarter of customers were unsure about their likelihood of enrolling. Among those unlikely to sign up, more than one-fifth cited a general lack of interest as their primary reason, while a similar frequency reported not having any issues with their connectivity.



Reasons for Unlikelihood to Sign up for Mesh WiFi

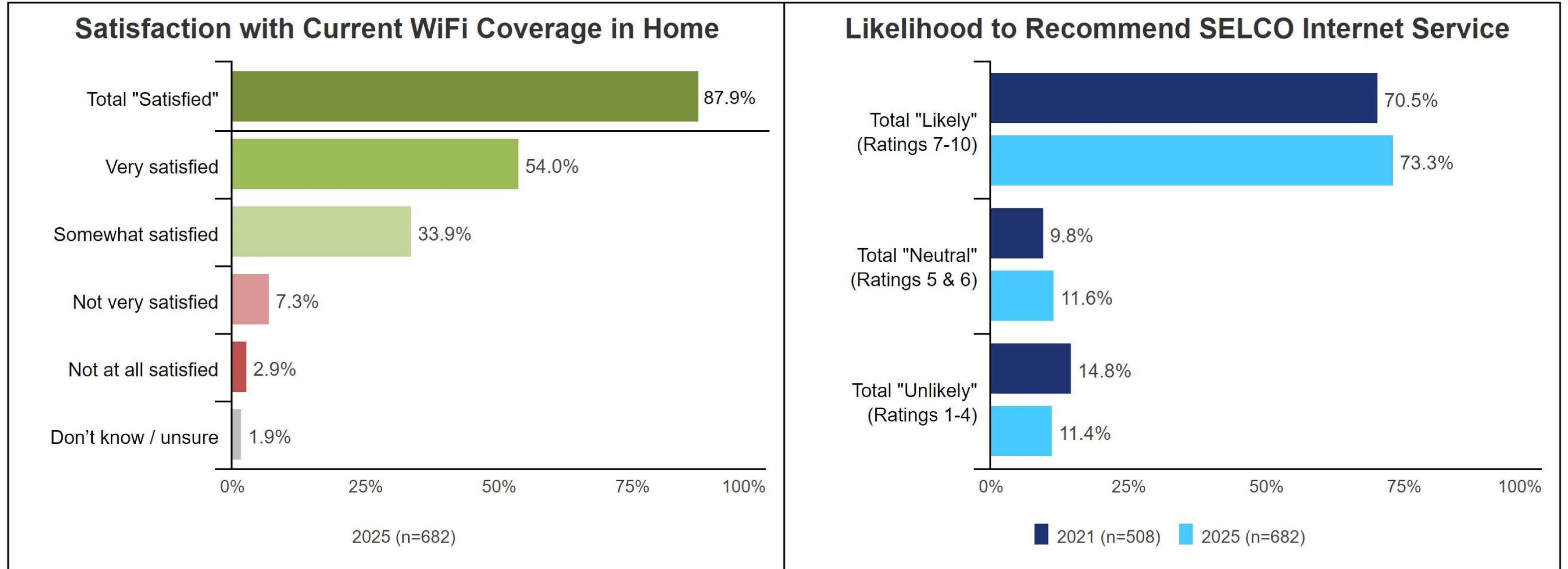
Base size	234
Not interested / no need	26.9%
No current issues with connectivity / it works / satisfied	24.8%
Price / cost / fees	13.2%
Prefer the ability to control / manage WiFi privately	7.7%
Have their own WiFi / Routers	6.8%
Need more information / don't know about it	4.7%

Top 6 responses shown; Not including customers who already have Mesh WiFi installed

[mesh_wifi_likelihood]: SELCO's Mesh WiFi includes extended Wifi range and coverage, that helps improve device streaming, gaming and downloading. How likely would you say you are to sign up for SELCO's Mesh WiFi?
[enhanced_wifi_unlikely]: For what reasons are you unlikely to sign up for SELCO's Mesh WiFi?

Internet | WiFi Satisfaction & Likelihood to Recommend

Nearly nine-out-of-ten customers were satisfied with their current in-home WiFi coverage throughout all rooms and spaces in their homes, including over one-half of customers who were "very satisfied." Further, nearly three-quarters of customers would be likely to recommend SELCO internet service to a friend or colleague, which was a slight increase compared to 2021 (+2.8 percentage points).



[wifi_satisfaction]: How satisfied are you with your current in-home Wi-Fi coverage throughout all rooms and spaces?

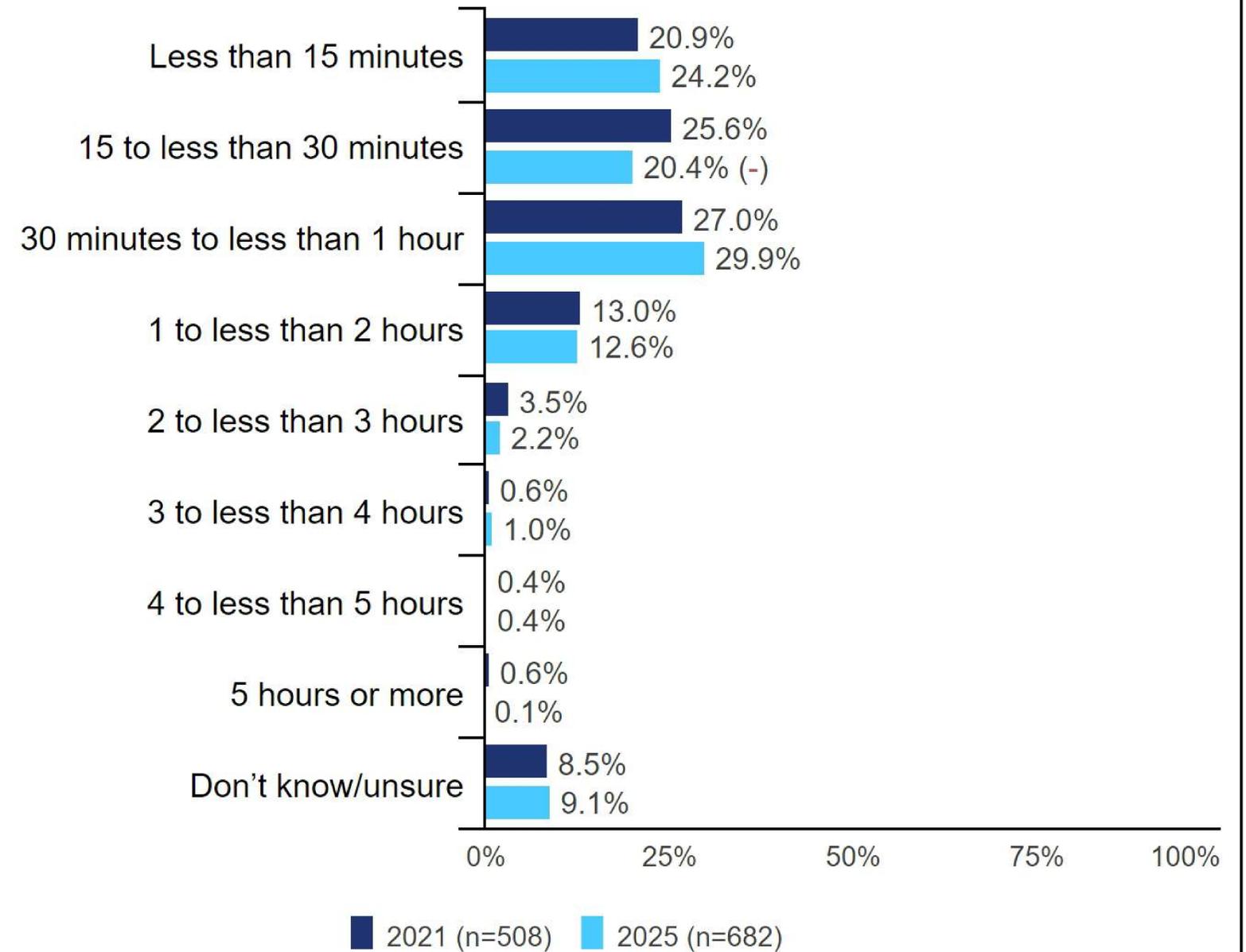
[likelihood_recommend_internet]: On a scale of 1 to 10, where 1 is very unlikely and 10 is very likely, how likely is it that you would recommend SELCO internet service to a friend or colleague?

Internet | Reasonable Outage Length

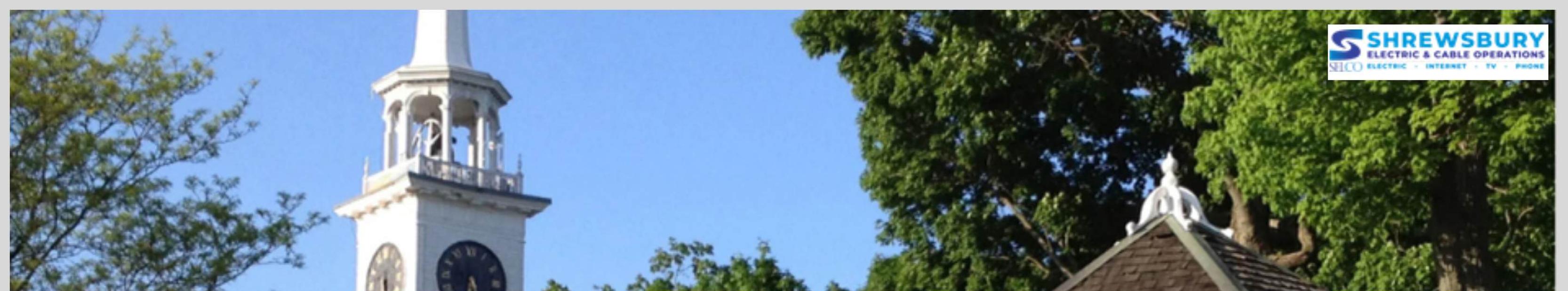
When experiencing an internet outage, over one-quarter of internet customers would consider "30 minutes to less than 1 hour" to be a reasonable amount of time to restore internet service.

Further, roughly one-quarter would consider "less than 15 minutes" to be a reasonable amount of time to restore service, and one-fifth of customers would consider "15 to less than 30 minutes" to be a reasonable amount of time, a decrease compared to 2021 (-5.2 percentage points).

Reasonable Amount of Time to be Without Internet



[internet_outage_time]: When you experience an internet outage, what do you consider a reasonable amount of time to restore your internet service?
(+/-) indicates statistical significance at a 95% confidence level compared to 2021 data



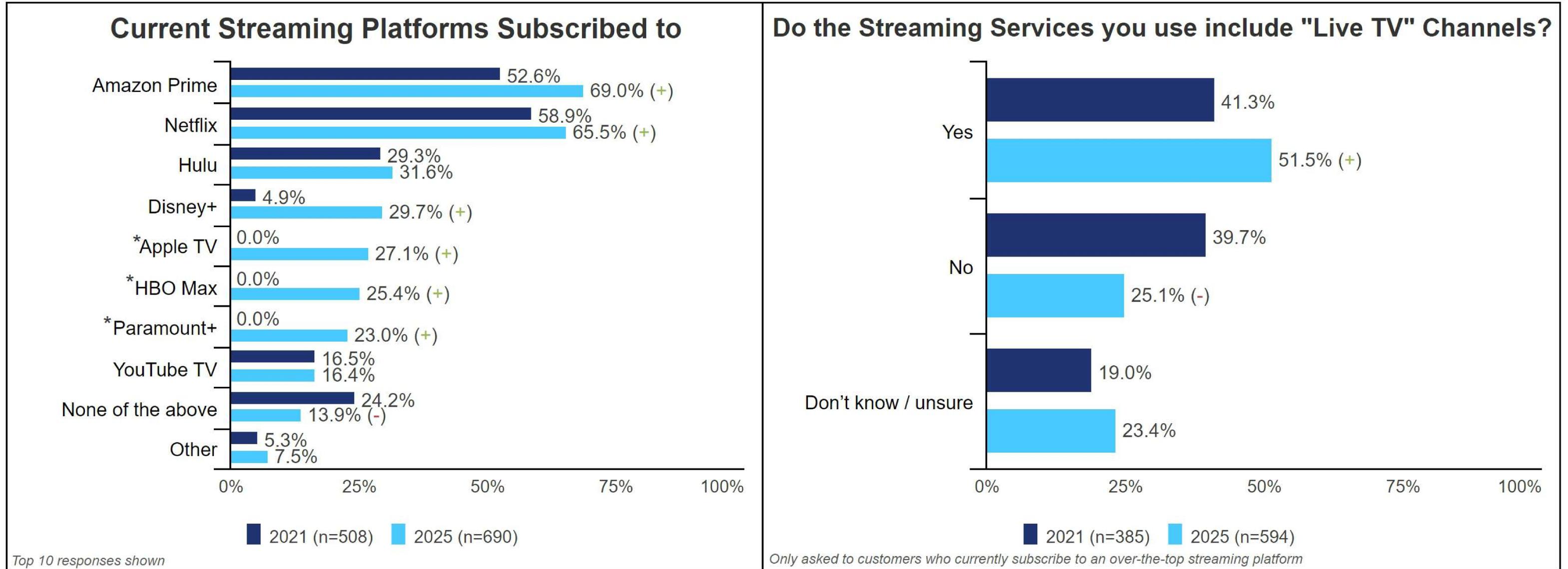
Customer Experience

Streaming TV & Internet



Streaming TV & Internet | Streaming Services

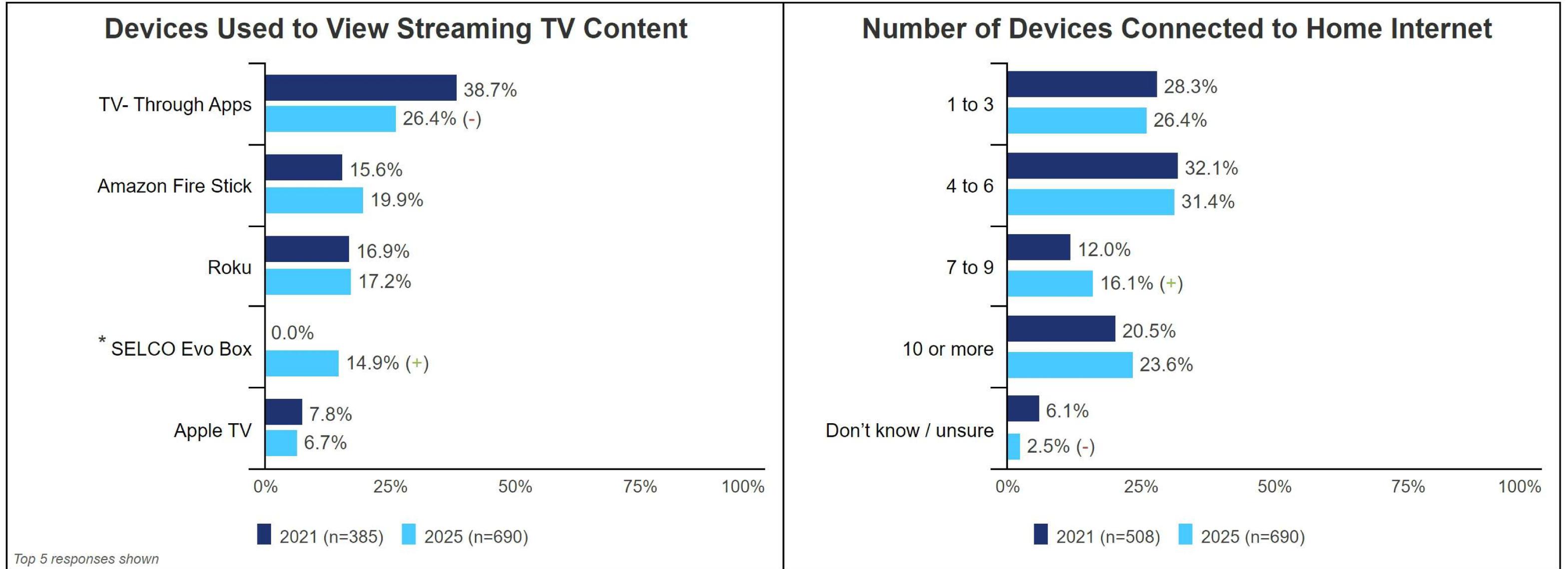
Approximately two-thirds of customers currently subscribe to "Amazon Prime" and/or "Netflix," significantly more compared to those who subscribed to the platforms in 2021 (+16.4 and +6.6 percentage points, respectively). Over one-half of customers reported that the streaming services they use include "Live TV" channels, a significant increase compared to 2021 (+10.2 percentage points).



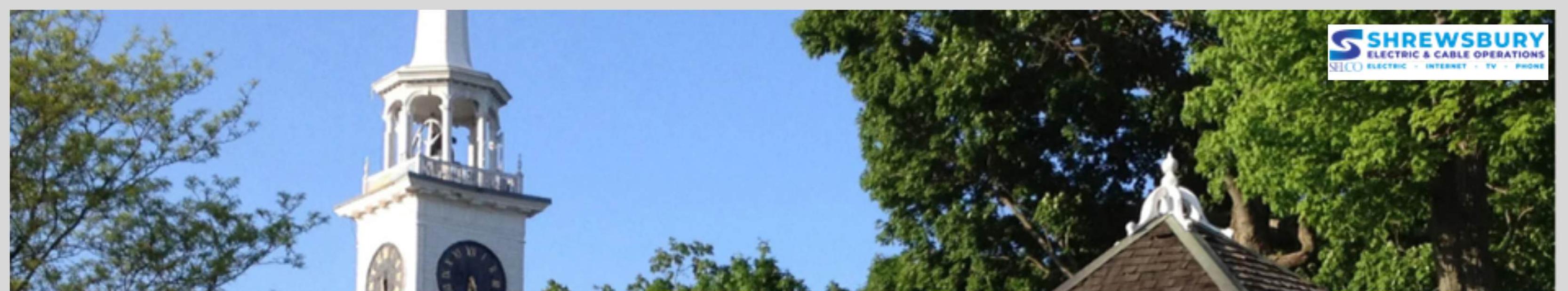
[streaming_subscriptions]: Do you currently subscribe to any of the following over-the-top streaming platforms? (Select all that apply)
 [streaming_live_tv]: Do the streaming services you use include "Live TV" channels? That is, are you able to watch live TV through the streaming service?
 *Answer options added in 2025
 (+/-) indicates statistical significance at a 95% confidence level compared to 2021 data

Streaming TV & Internet | Streaming Devices

More than one-quarter of customers currently use their "TV - through apps" to view streaming content, a significant decline from 2021 (-12.3 percentage points). Notably, one-out-of-seven customers reported using the "SELCO Evo Box" to access streaming content, a response option newly introduced in 2025. Additionally, nearly three-quarters of customers (71.1%) reported having four or more devices connected to the internet in their home.



[streaming_TV_devices]: What device do you use the most to view your streaming TV content?
 [devices_connected_internet]: How many devices do you have connected to the internet in your home?
 *Answer option added in 2025
 (+/-) indicates statistical significance at a 95% confidence level compared to 2021 data

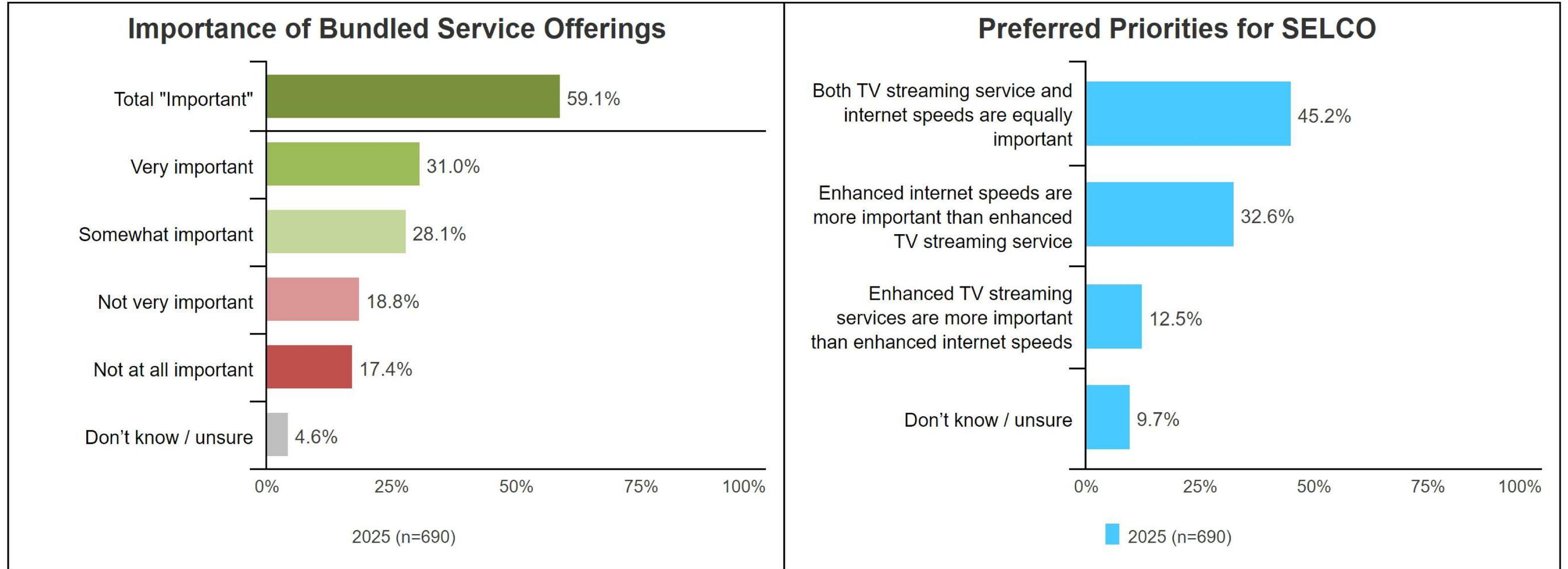


Future Programs & Services



Programs & Services | Priorities

Nearly three-fifths of customers reported that SELCO offering bundled services (internet, TV, and phone) versus having to use separate providers for these services is important to them. Further, over two-fifths of customers reported that "both TV streaming service and internet speeds are equally important" regarding SELCO's priorities moving forward, while nearly one-third reported that "enhanced internet speeds are more important than enhanced TV streaming service."



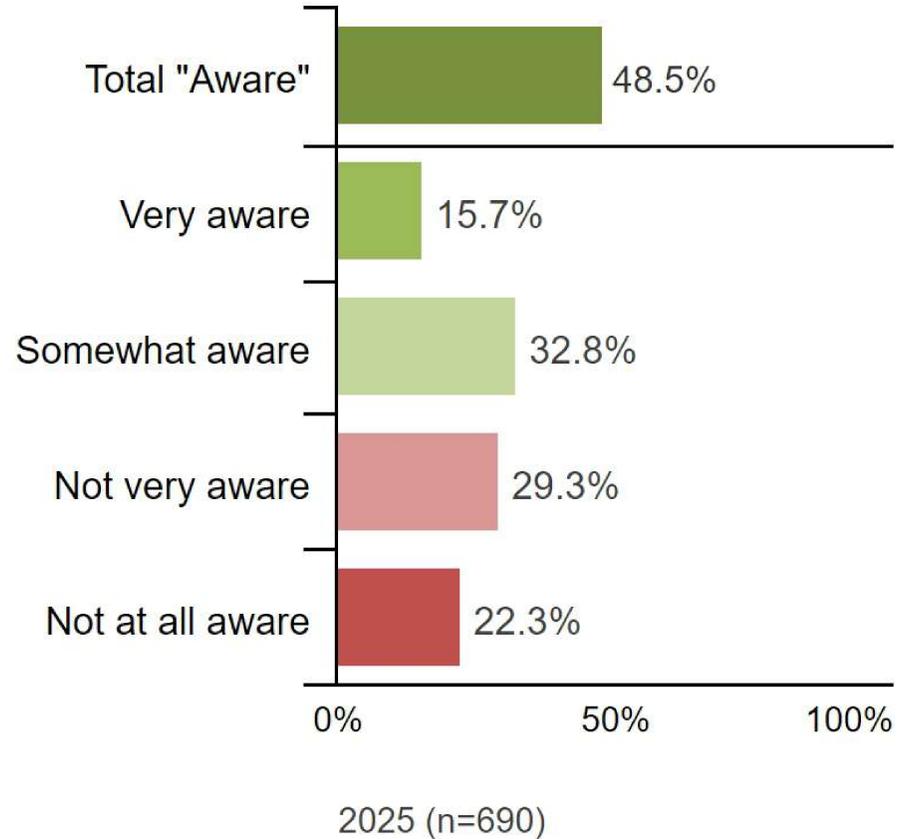
[bundling_internet_TV]: How important is it to you that SELCO offers bundled services (internet, TV, and phone) versus having to use separate providers for these services?
[internet_video_priorities]: Please describe which statement best describes where you would like SELCO to prioritize their efforts moving forward.

Programs & Services | Perceptions of Services

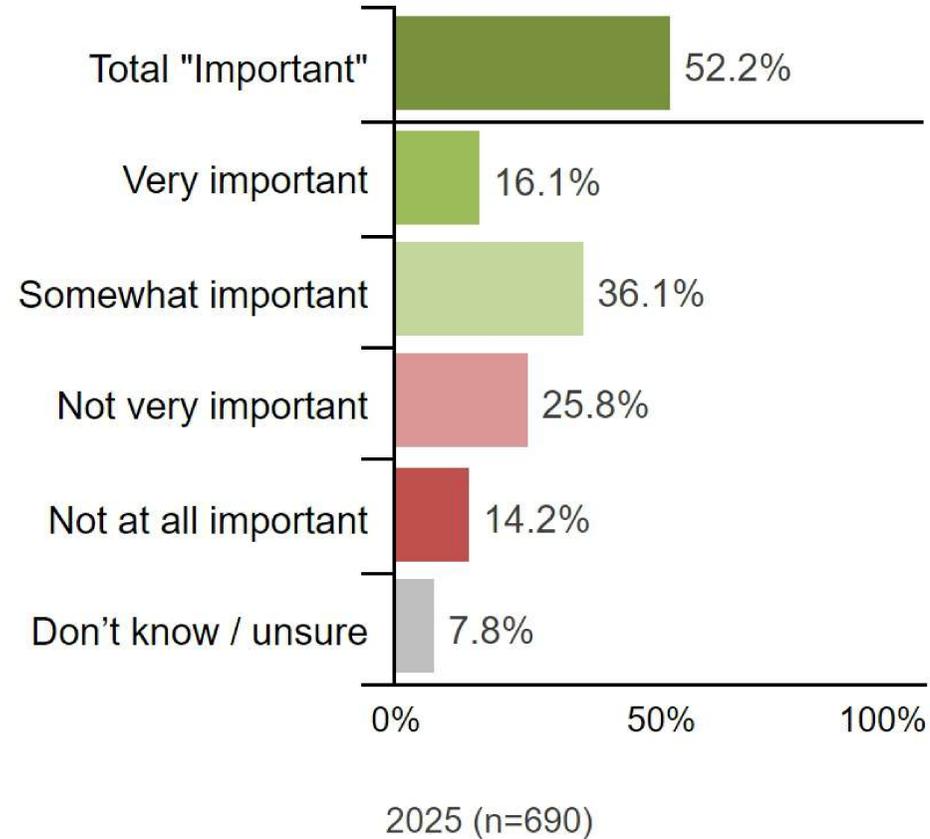
Nearly one-half of customers were aware that SELCO's WiFi product allows them to have control of their entire network of devices, which are connected to the internet. Similarly, over one-half of customers find it important for SELCO to provide more smart home support (e.g., device management, cybersecurity, parental controls), although only roughly one-quarter of customers would be likely to sign up for smart home services, like video monitoring, through SELCO.

Perceptions of SELCO Services Offered

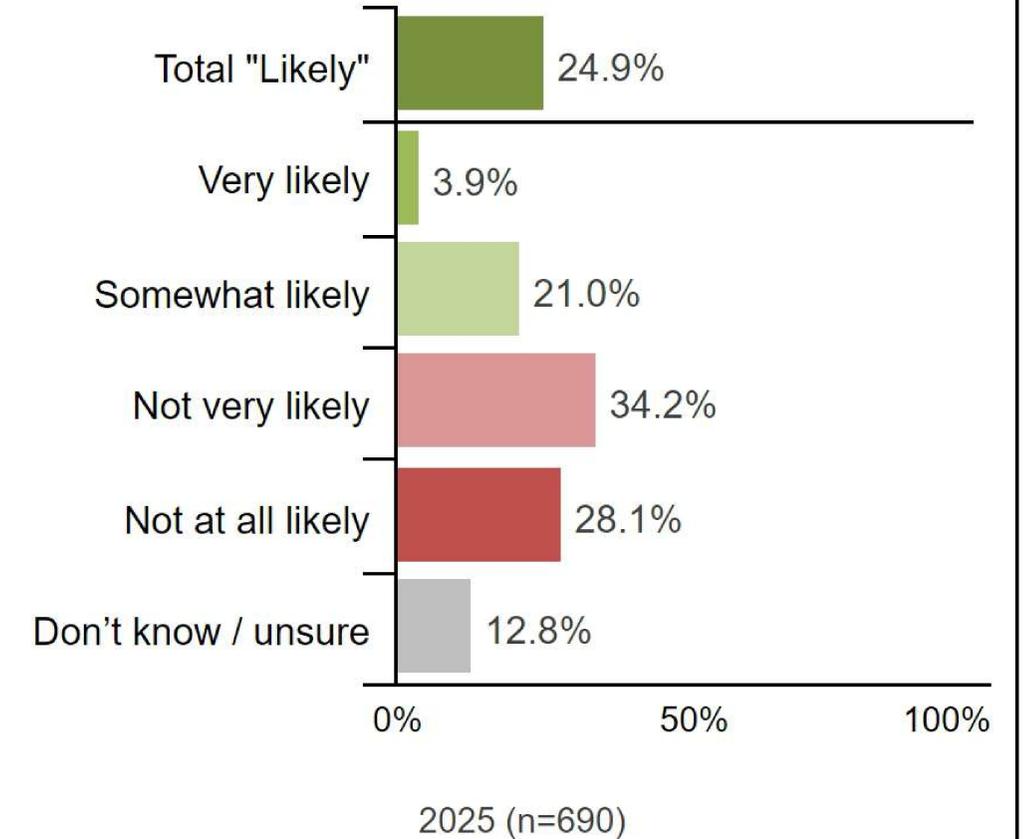
Awareness of SELCO WiFi Product Control of Network of Devices Feature



Importance of Additional Smart Home Support through SELCO



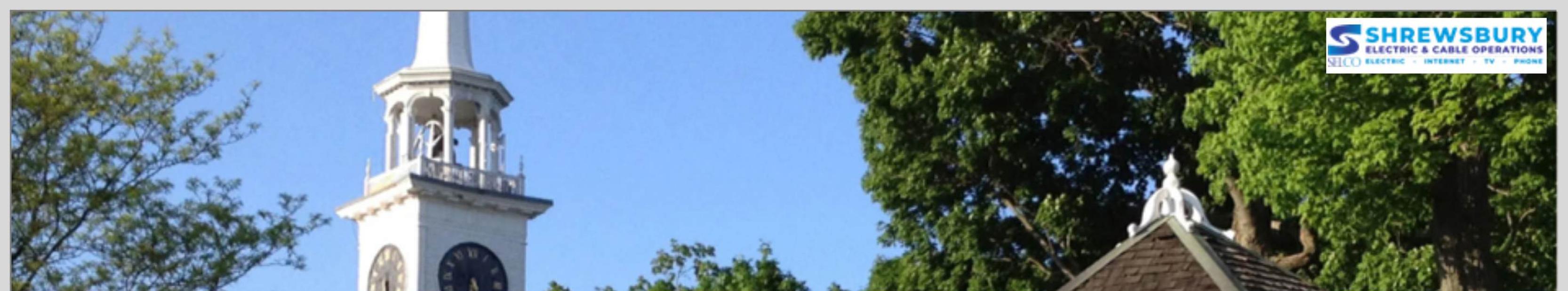
Likelihood to Sign up for SELCO Smart Home Services



[home_network_awareness]: Prior to this survey, how aware were you that this coverage is included in SELCO's WiFi package?

[smart_home_importance]: How important would it be for SELCO to provide more smart home support (e.g., device management, cybersecurity, parental controls)?

[smart_home_likelihood]: How likely would you be to sign up for smart home services, such as video monitoring, through SELCO?



Considerations





Stabilize & Reposition the SELCO Stream TV Offering

Customer satisfaction with SELCO Stream TV declined significantly compared to 2023, driven primarily by perceptions of reduced service quality, reliability, and value for the price. While customers continue to express high satisfaction with channel variety and local customer service, concerns around streaming performance and pricing are contributing to lower overall satisfaction and increased uncertainty about subscribing to SELCO's TV service in the future. At the same time, customers continue to value SELCO's community reinvestment, local support, and bundled service convenience. Addressing performance and value perceptions while reinforcing SELCO's local differentiation will be critical to stabilizing the Stream TV customer base.

Actionable Insights

- Conduct a focused review of streaming reliability and performance issues to identify and address root causes of poor reception quality.
- Reevaluate Stream TV pricing and package structures to ensure alignment with perceived value and competitive alternatives.
- Continue to communicate to customers of SELCO's efforts to continue to deliver strong performance, reliability, and functionality through its SELCO Stream platform, despite switching from the Cable TV model, to help demonstrate the value of SELCO Stream TV.
- Continue to promote educational materials detailing SELCO's new stream model to customers who are less familiar and unaware of its functionality and capabilities.

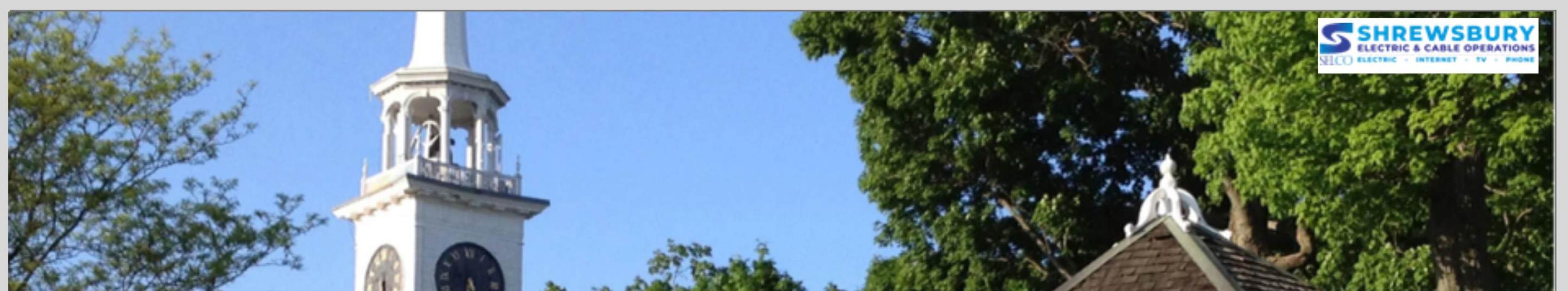


Leverage Strong Internet Performance to Drive Growth in WiFi, Bundling, & Future Services

Internet service remains a key strength for SELCO, with high satisfaction, strong performance ratings, and increased likelihood to recommend. However, awareness and understanding of value-added offerings, particularly Mesh WiFi and smart home capabilities, remain uneven, limiting adoption. A sizable share of customers are either unaware of these offerings or unsure of their likelihood to enroll, indicating an opportunity for clearer education and targeted marketing. By aligning communication, education, and bundling strategies, SELCO can capitalize on its internet service strength to drive incremental adoption and long-term customer value.

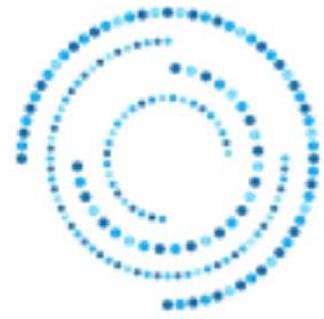
Actionable Insights

- Simplify and clarify messaging around Mesh WiFi benefits, focusing on coverage, performance, and remote troubleshooting capabilities.
- Use high internet satisfaction and recommendation scores as anchors in marketing and cross-promotion efforts.
- Integrate WiFi, Mesh WiFi, and smart home offerings into bundled service packages to improve perceived value.
- Develop targeted education campaigns for customers who report being unaware or unsure about Mesh WiFi.
- Highlight smart home, security, and device management features as customer needs evolve with increased device usage.



About GreatBlue





Harnessing the Power of Data

...to help clients achieve organizational goals.

 **Data** supporting strategic decisions to improve products and services. Since 1979, our experience with study and instrument design, data collection, analysis, and formal presentation assists our clients in identifying the “why” and “what’s next.”

 **Talent** with a knowledge base in a wide range of industries and methodologies ensures a 360° view of the challenges faced and the expertise to address them.

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

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Studies:



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