

# **BURLINGTON TELECOM MARKET RESEARCH SUMMARY**

Research fielded and completed in April 2014

**Burlington  
Telecom**

# PURPOSE OF SURVEYS

Burlington Telecom released two surveys in April:

## Customer Satisfaction

- **When:** Launched April 15<sup>th</sup> to customer emails
- **Purpose:** Determine current customer satisfaction and feedback on products

## General Population

- **When:** Launched April 17<sup>th</sup> on Front Porch Forum and on Social Media
- **Purpose:** Create overall view of Internet customers in Burlington and engage customers for whom we do not have email

# PARTICIPATION and SIGNIFICANCE

There were over 600 participants in our surveys and the results were statistically significant.

## Customer Satisfaction Survey

- Population: 4,200 customers
- 750 emails sent
- 195 Respondents
- Margin of Error:  $\pm 5.8\%$
- Confidence Interval: 90%\*

## General Population Survey

- Population: 42,282
- FPF and Social Media used
- 408 Respondents
- Margin of Error:  $\pm 4.8\%$
- Confidence Interval: 95%

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## Combined BT Customer Responses

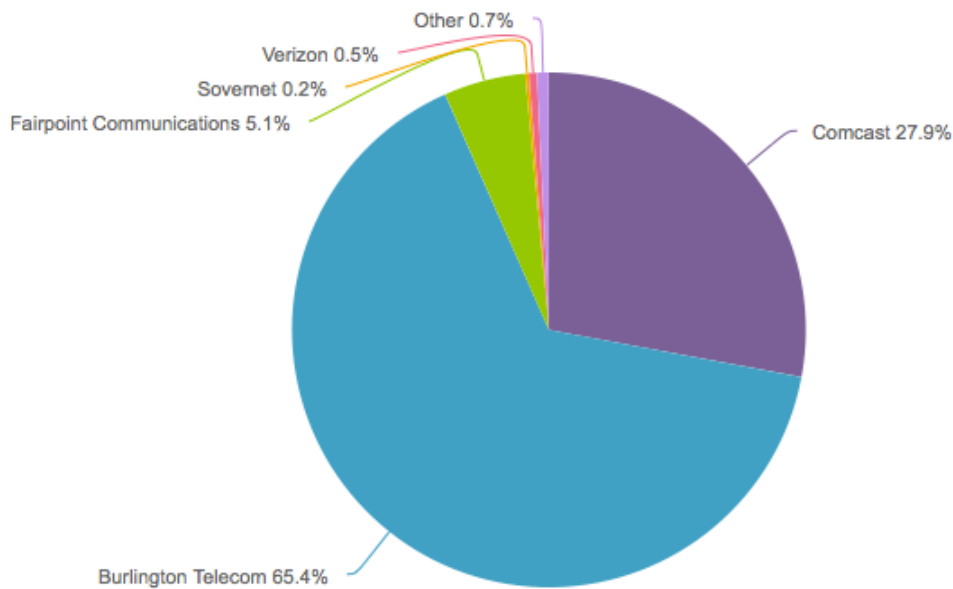
- Population: 4,200 customers
- 462 TOTAL BT Customers responded (195 Cust Satisfaction + 267 Gen Pop)
- Margin of Error:  $\pm 4.3\%$
- Confidence Interval: 95%

\* This Confidence Interval is low. The Combined Scores are used instead unless the question was not included in the General Population survey (for length purposes) which include "Date joined" and "Customer Service" questions.

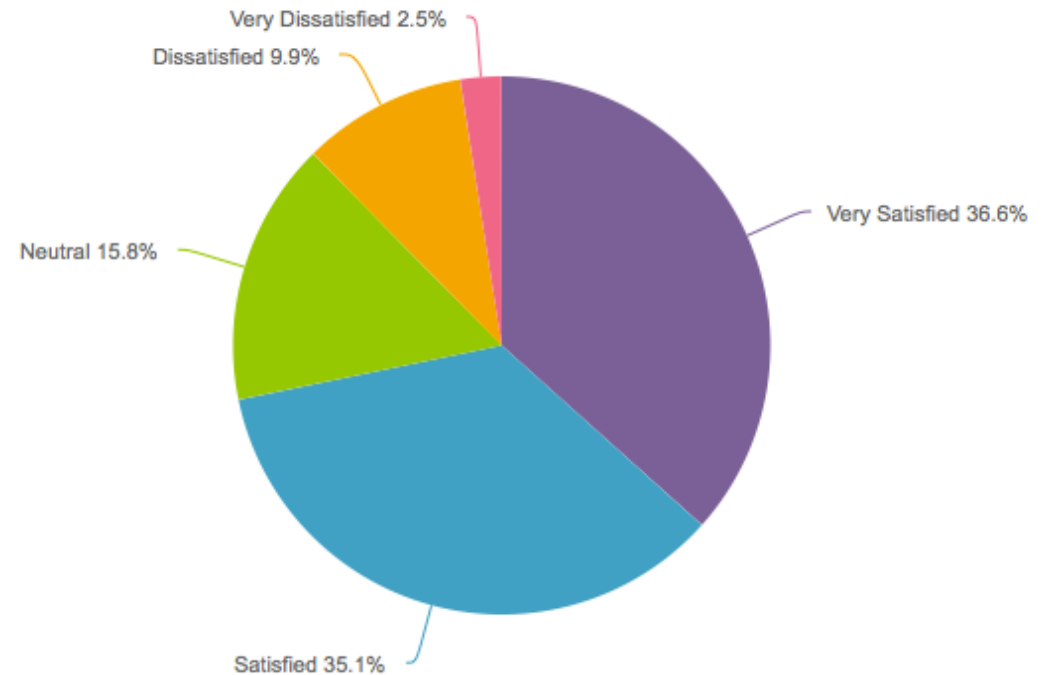
# GENERAL POPULATION RESULTS

Within the General Population survey, which includes both BT and competitor subscribers, levels of dissatisfaction were fairly low. As you will see later, this is in part due to the high answer rate of BT customers.

### Internet Provider



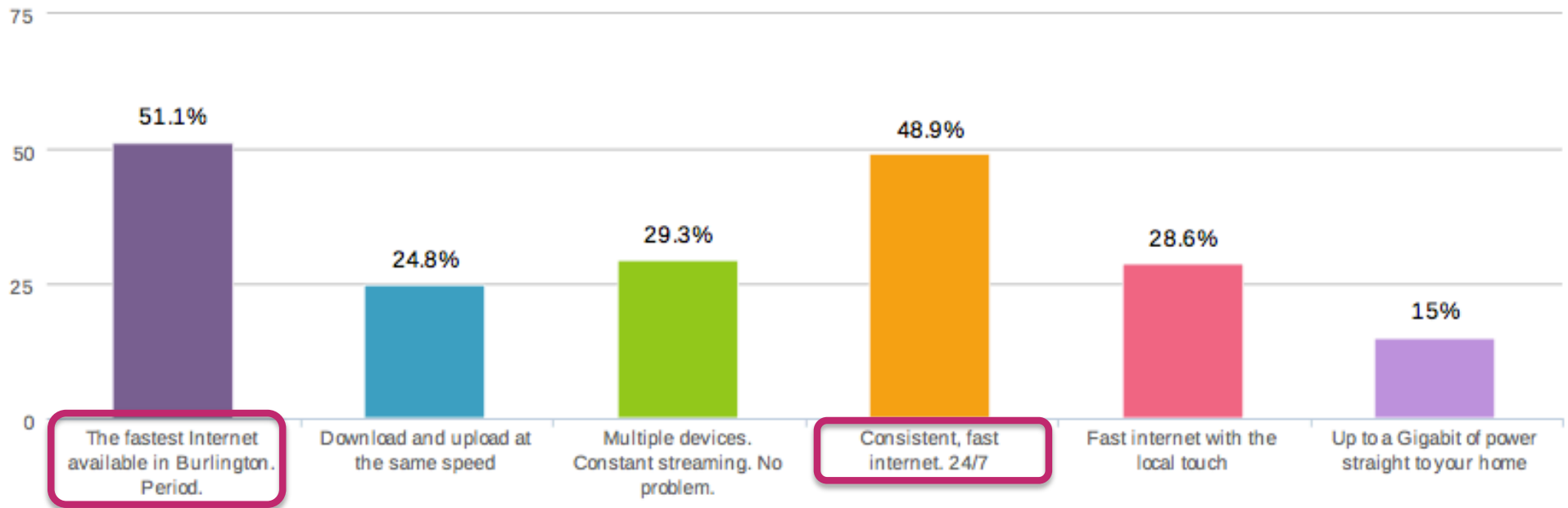
### How satisfied are you with your provider?



# NON-USER MESSAGING

Customers who are not with BT are interested in fast and reliable service. More specific messages were not as popular, including streaming multiple devices or Gigabit interest.

**Which of the following messages most resonates with you? (choose up to 3)**

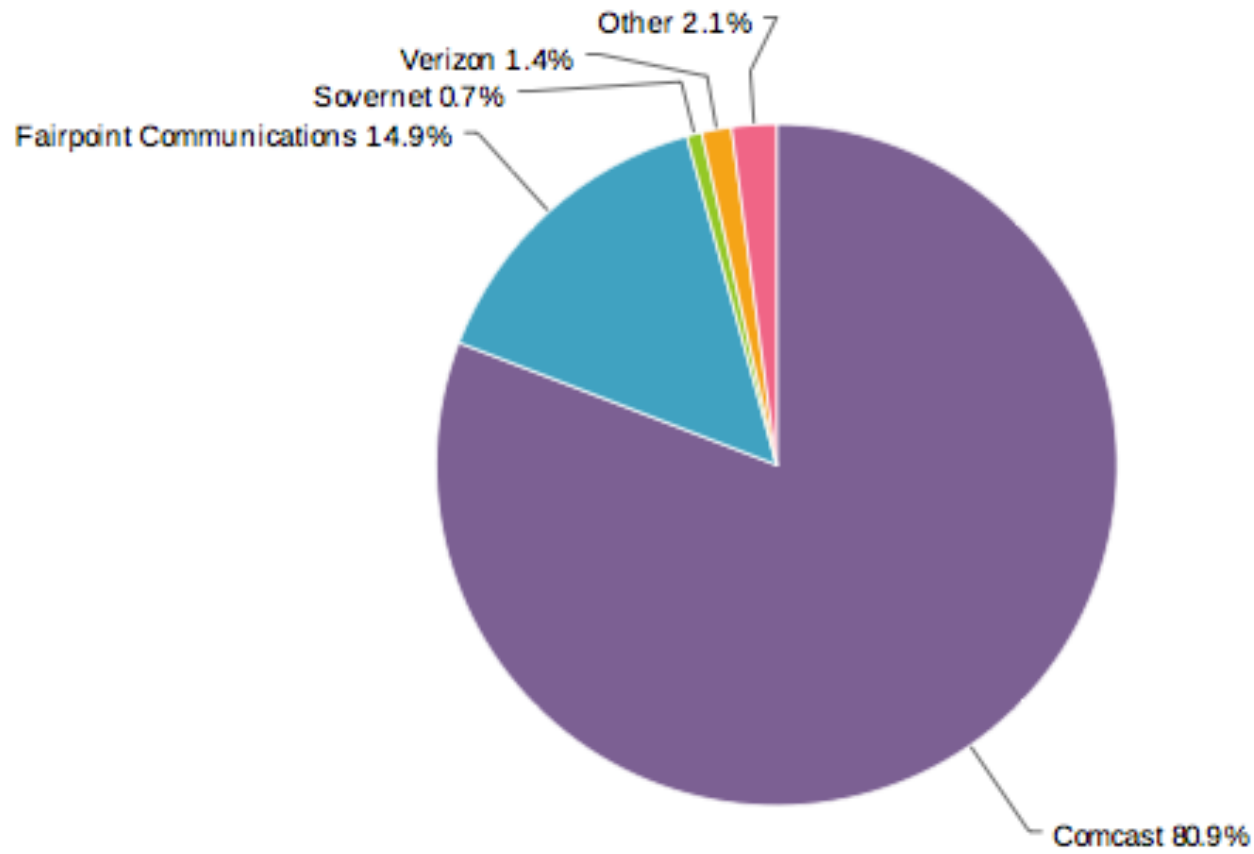


# **BT COMPETITORS AND SERVICES**

# COMPETITOR OVERVIEW

As expected, Comcast is by far our biggest competitor, with Fairpoint taking up the majority of the remaining subscribers.

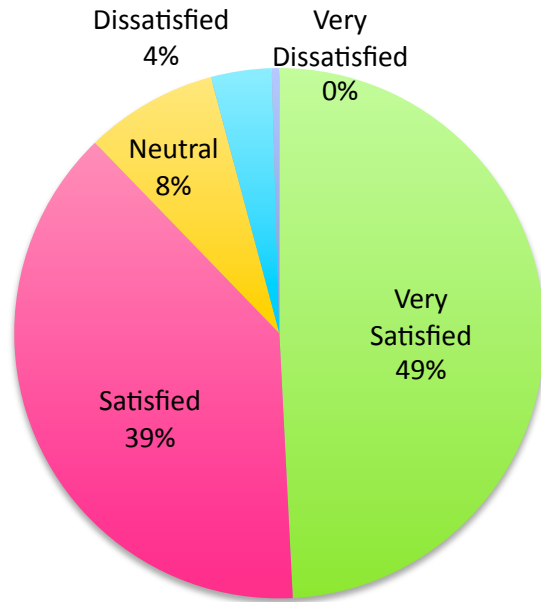
**What Internet provider do you use?**



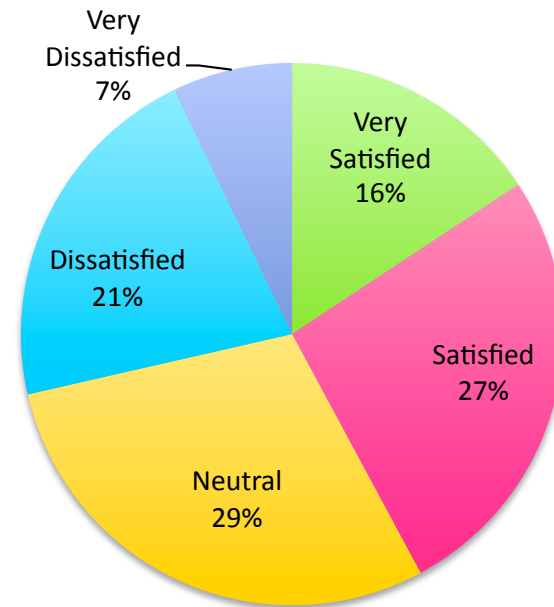
# OVERALL SATISFACTION

Though Comcast serves the majority of Burlington's Internet subscribers, satisfaction among Burlington Telecom subscribers is very high, much higher than that of our competitors.

## BT Subscribers



## Competitor Subscribers

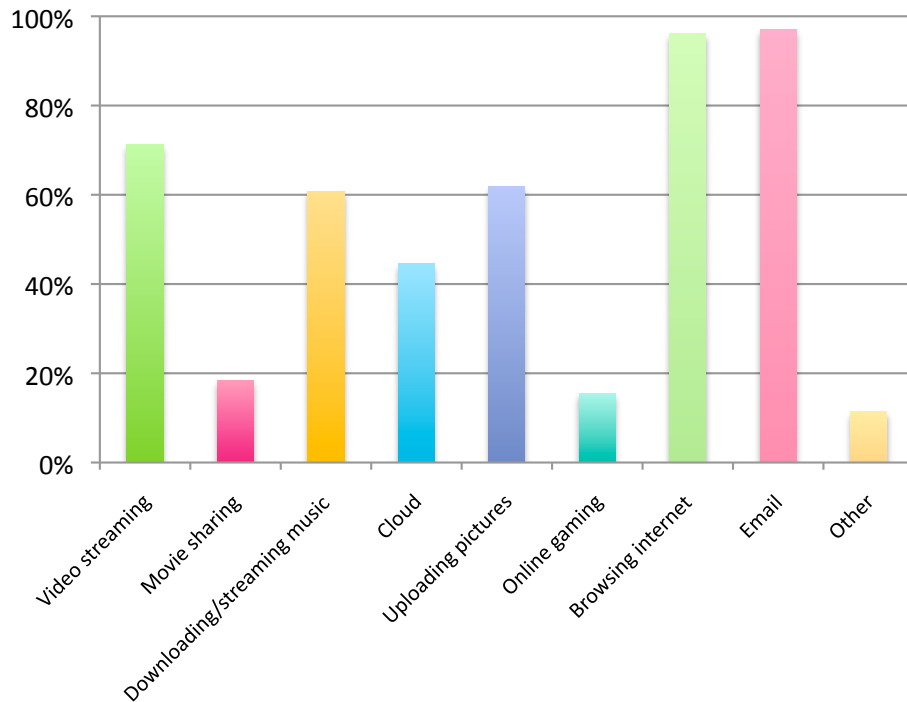




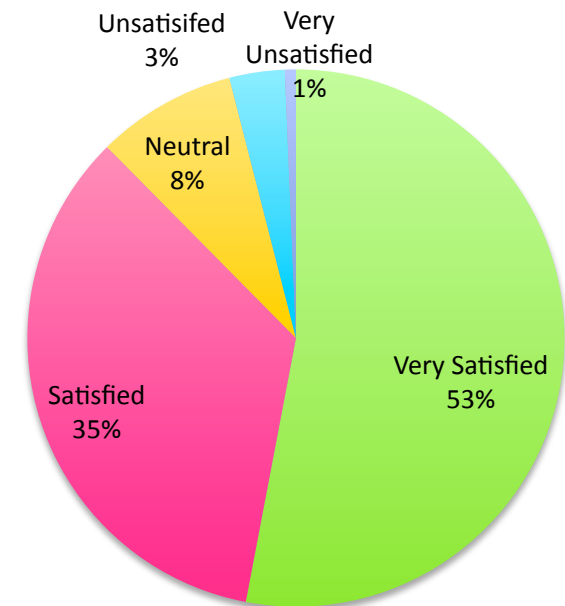
# BT SUBSCRIBER INTERNET USE

Video streaming and other high megabit Internet uses are continuing to grow in popularity. Satisfaction with Internet use is particularly high with Burlington Telecom subscribers, quite likely due to the reliability found with these uses.

## How do you use your Internet?



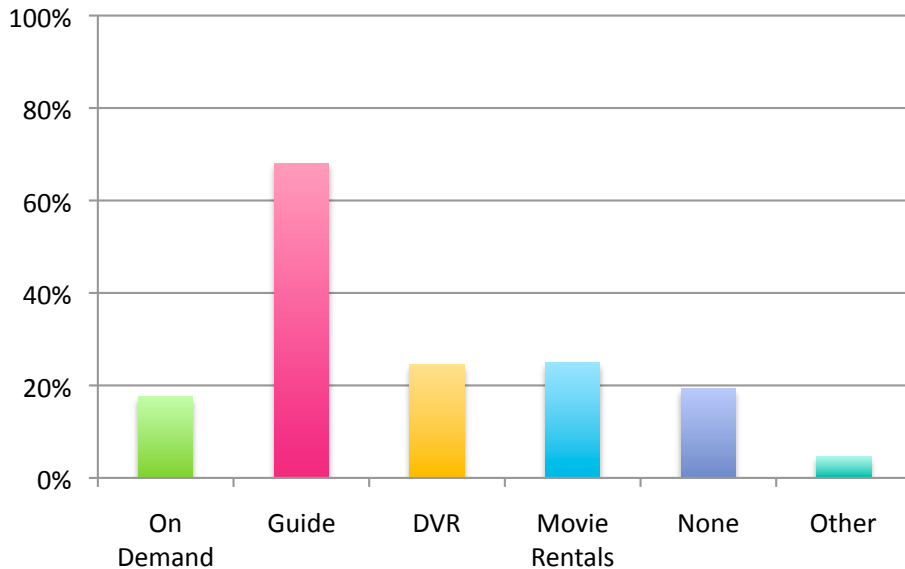
## How would you rate your Internet service?



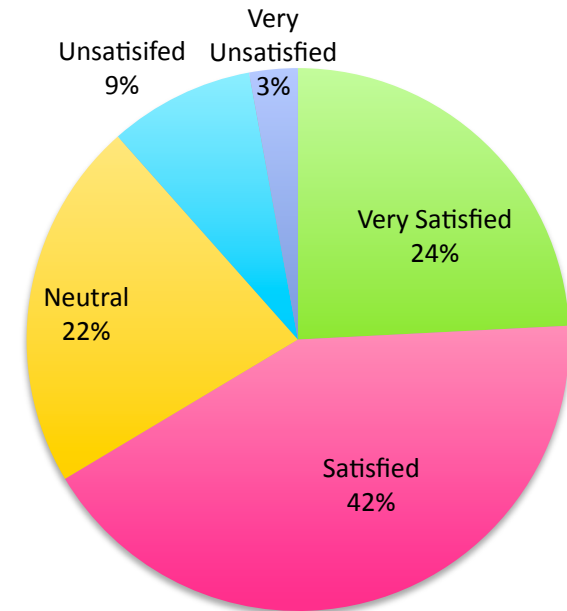
# BT SUBSCRIBER CABLE USE

Approximately 62.5% of our customers have Cable. Satisfaction is lower with our Cable offerings, around 68%, with room to delight our customers. Continuing to increase channel offerings and educate around streaming options may aid in satisfaction.

## How do you use your Cable?



## How would you rate your Cable service?

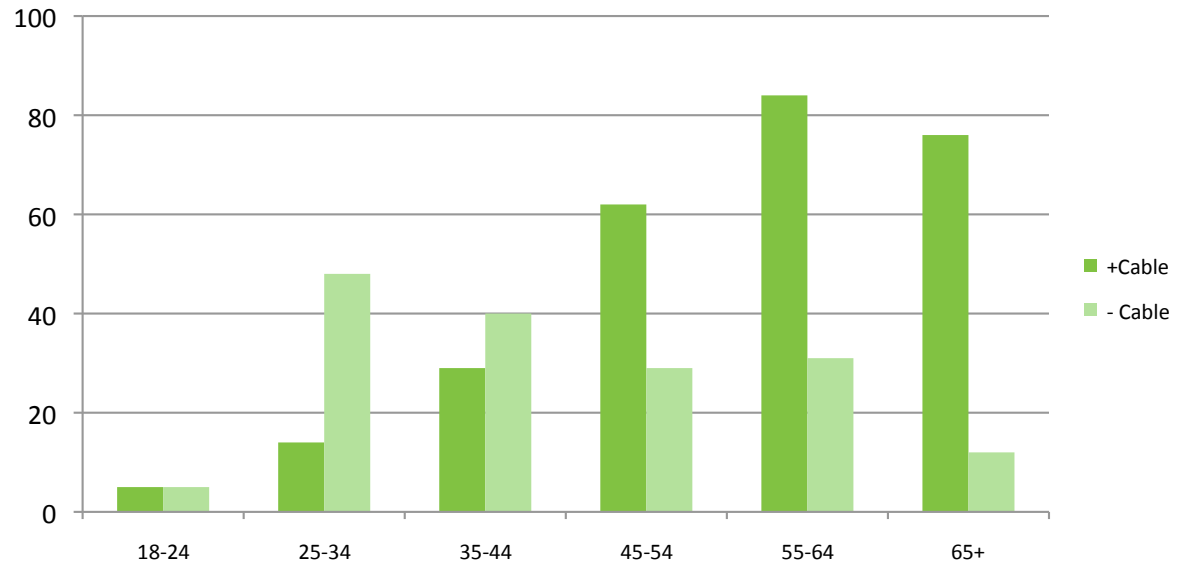


# BT CUSTOMER CABLE TRENDS

## Age

The younger demographic in Burlington is decreasing cable use, per national trend.

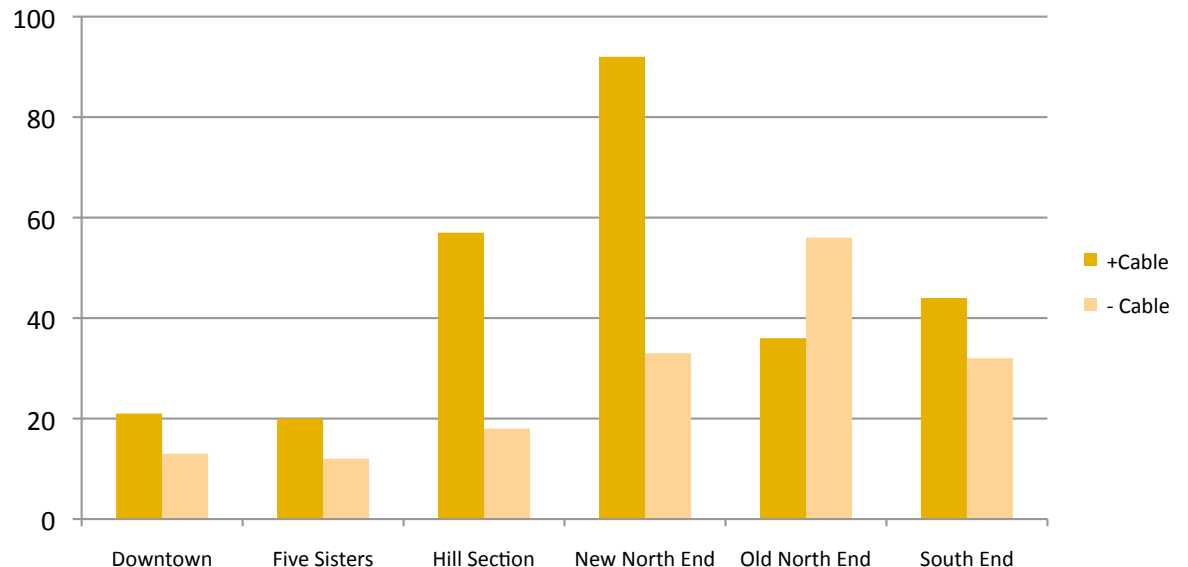
The majority of our customers, however, are older and use cable. We expect cable to continue to be a large part of our services.



## Neighborhood

The Hill section and New North End are very cable heavy.

The Old North End is the only significant neighborhood decreasing cable use. This is expected as it is the youngest demographic.

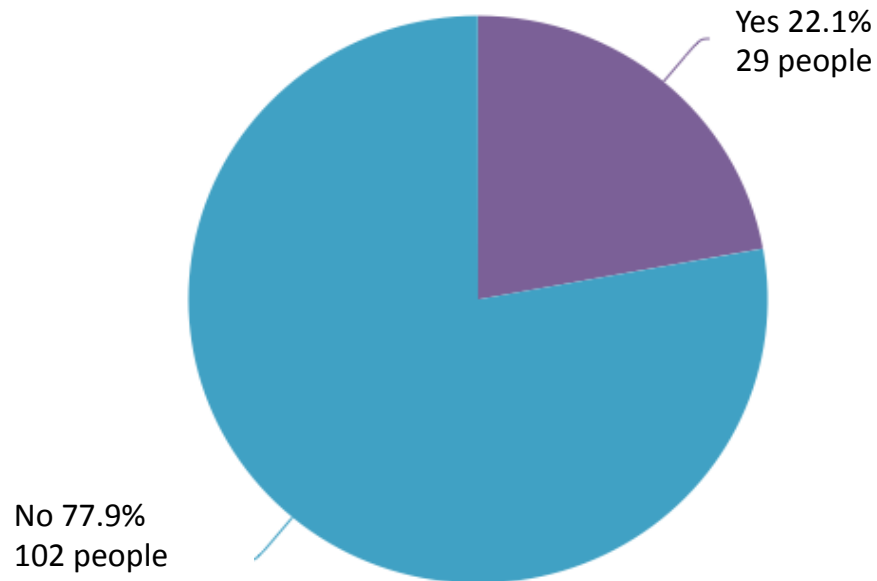


**COMPETITOR CUSTOMERS**

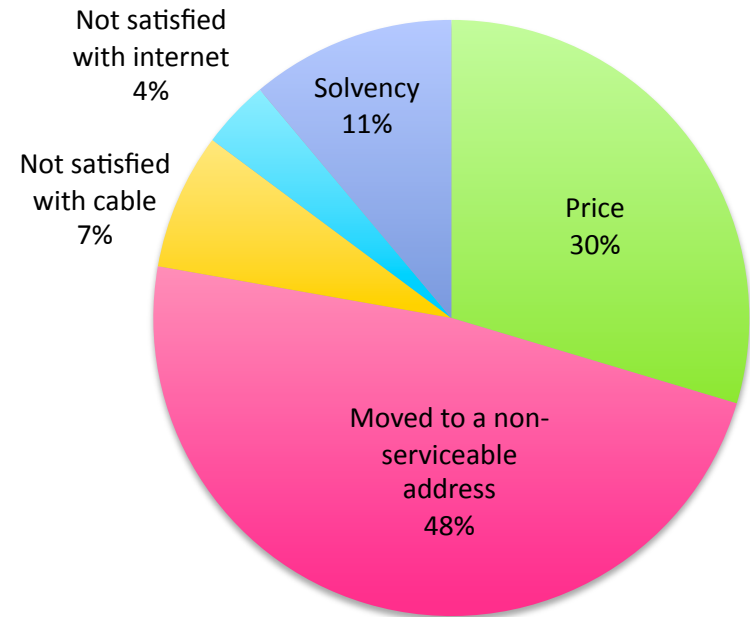
# PAST BT SUBSCRIBERS

Of the 131 non BT subscribers who responded, 22% were past BT users. The majority left BT when moving to a non-serviceable area or for a price deal.

## Have you been a BT User in the past?



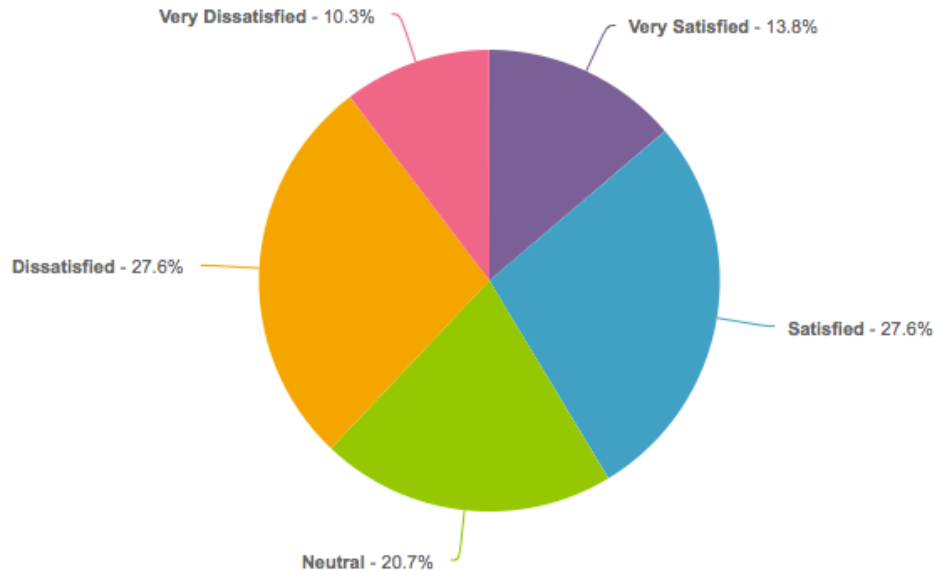
## Why did you change providers?



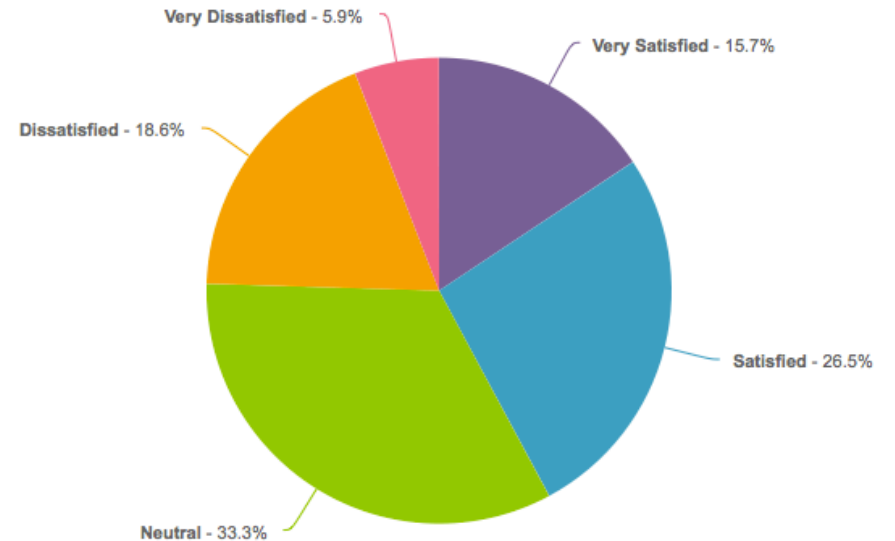
# OVERALL SATISFACTION

Satisfaction with a current provider is higher with those customers who have never had BT services.

## Past BT Customers



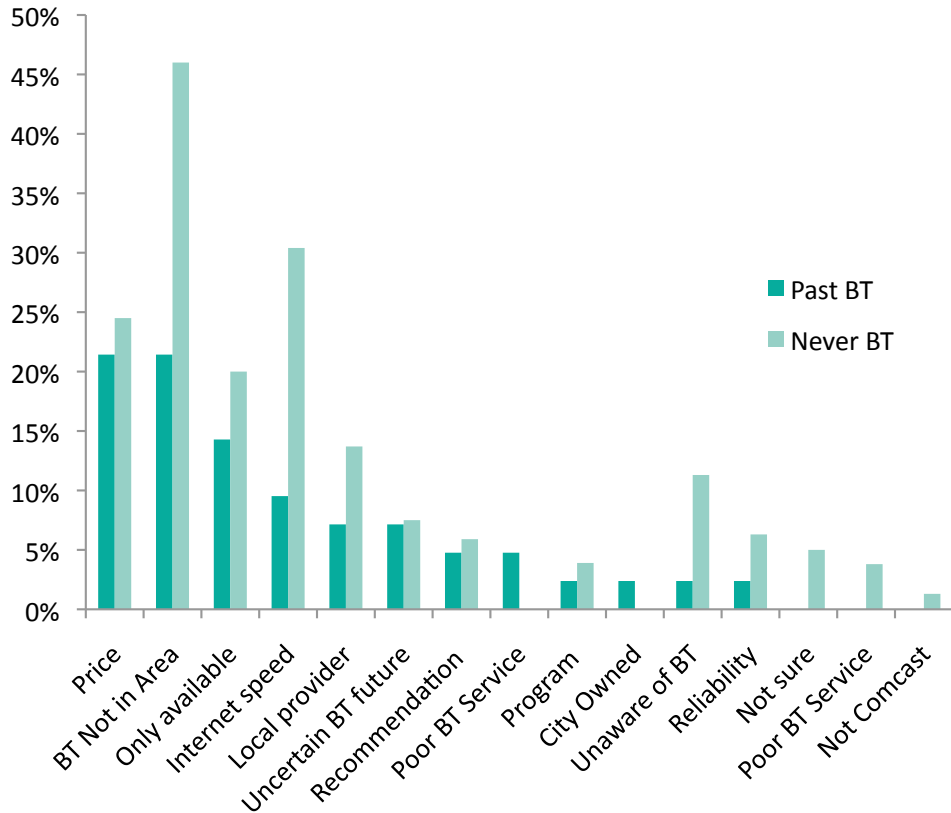
## Never BT Customers



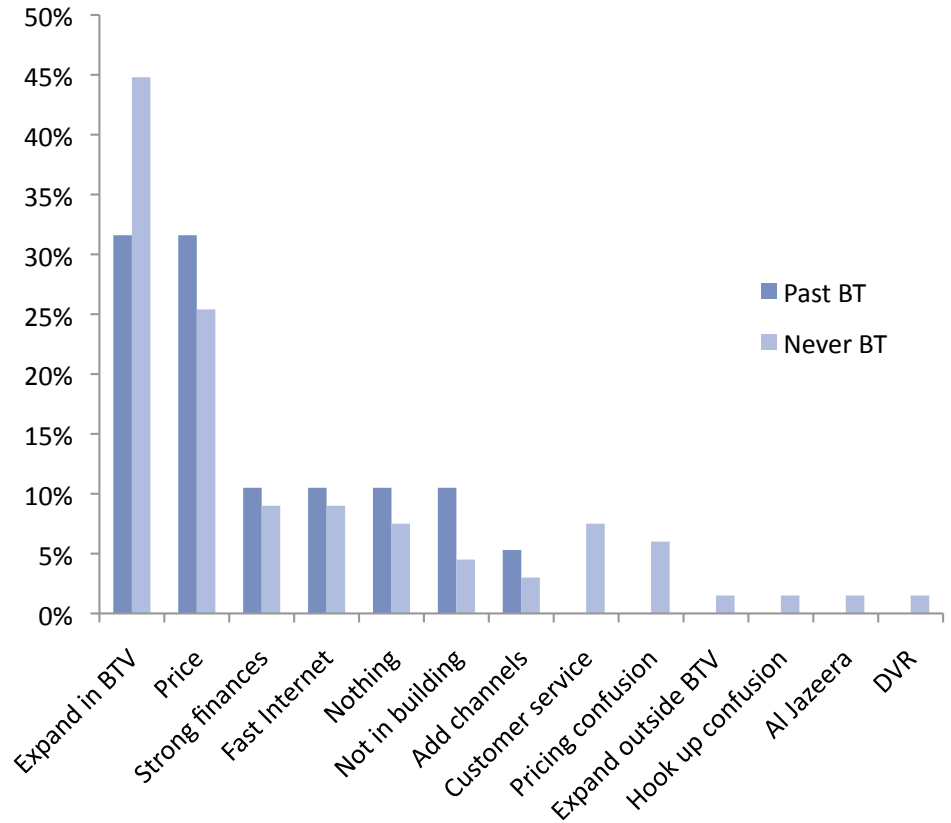
# PROVIDER SELECTION by NON BT USERS

Customers who have never had BT are hoping for expansion and the fastest speeds to switch. Past BT customers are more conservative and are looking for both expansion and reassurance.

### Why did you choose your provider?



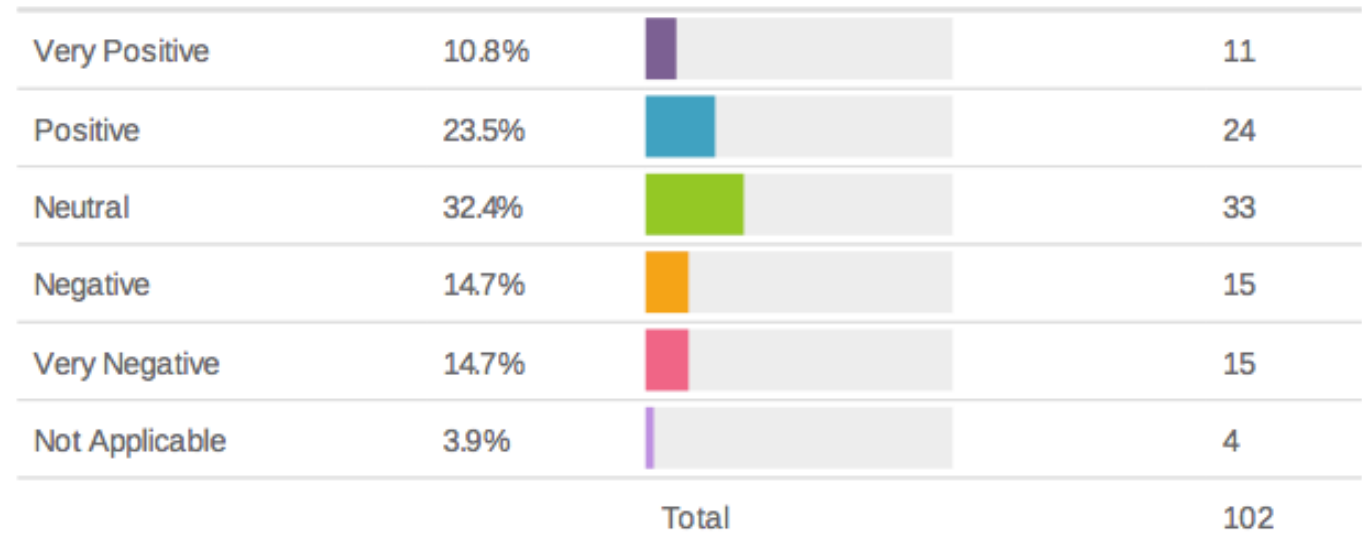
### What would convince you to use BT?



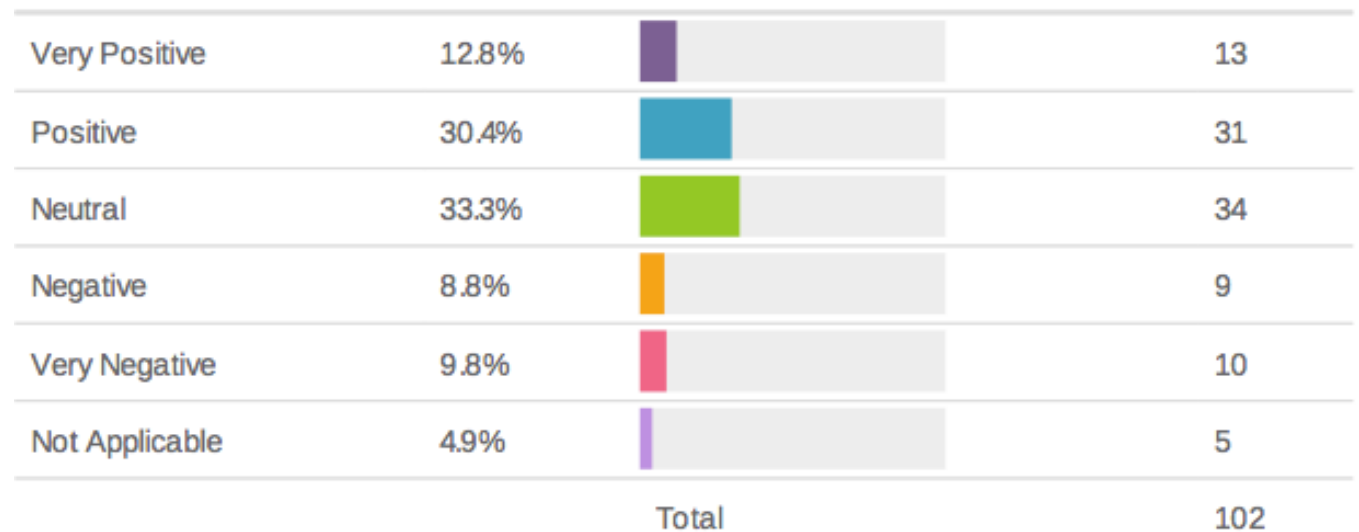
# BT IMPRESSION by NEVER BT USERS

People who have never been BT subscribers have a fairly neutral to slightly positive impression of both BT and its services.

### General Impression of Burlington Telecom



### General Impression of BT's services



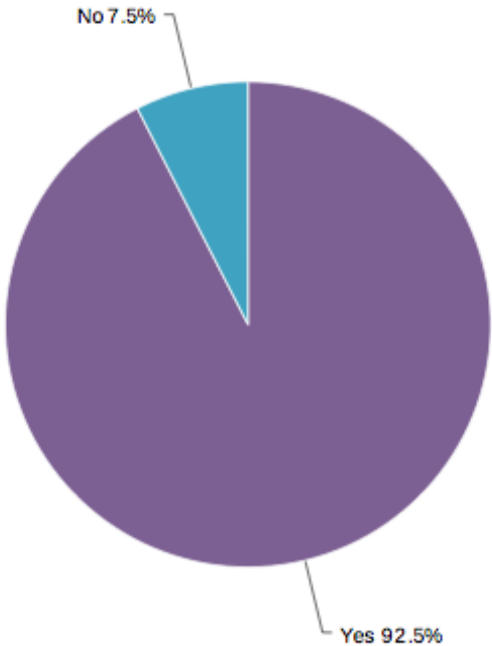


**CUSTOMER SERVICE**

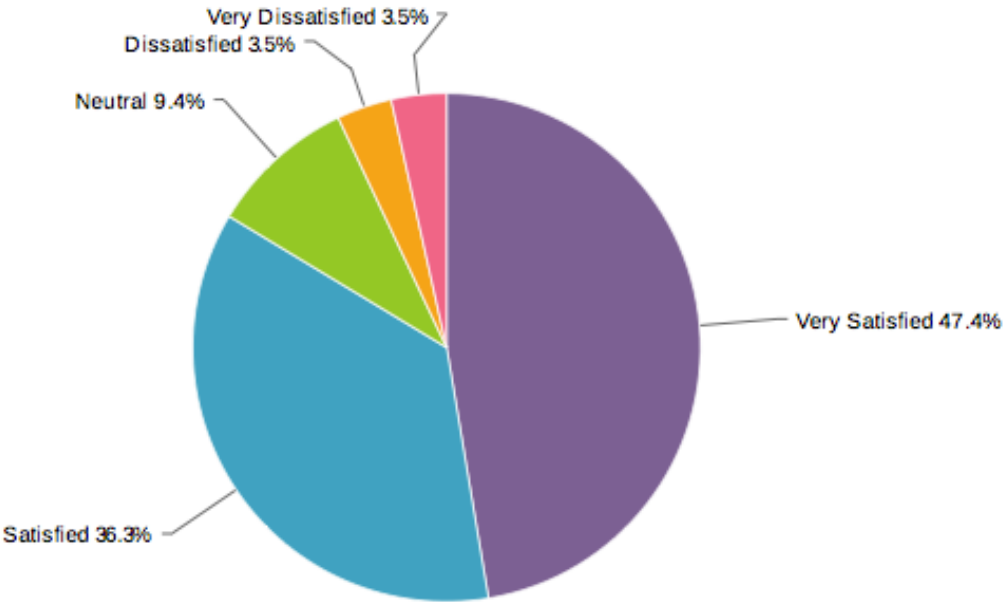
# CUSTOMER SERVICE SATISFACTION

The vast majority of customers have called customer service, which includes Sales, Help Desk and Outside Plant. Satisfaction is very high.

### Have you ever contacted Customer Service?



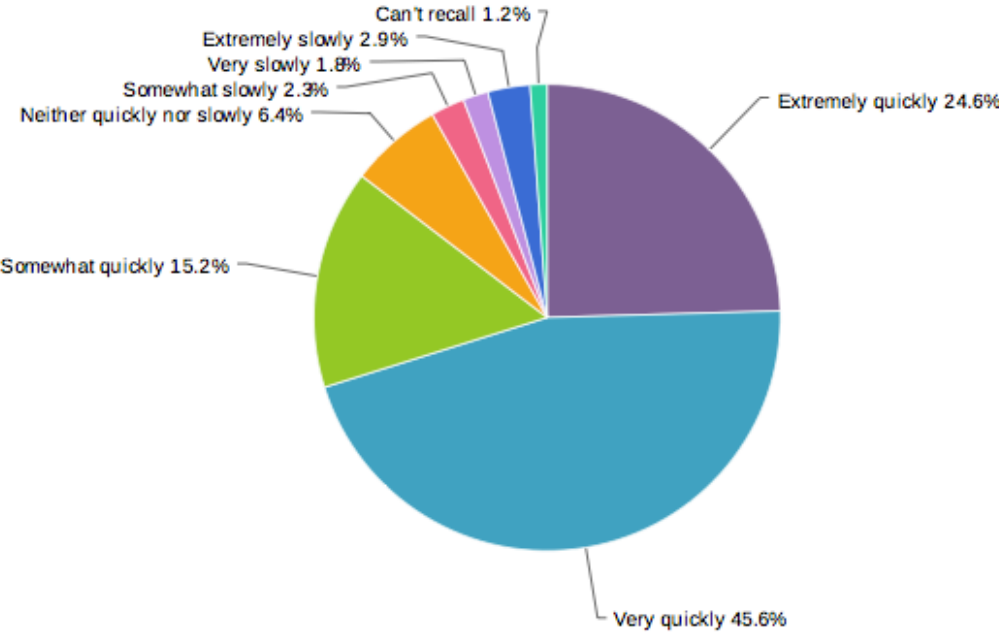
### Overall Satisfaction



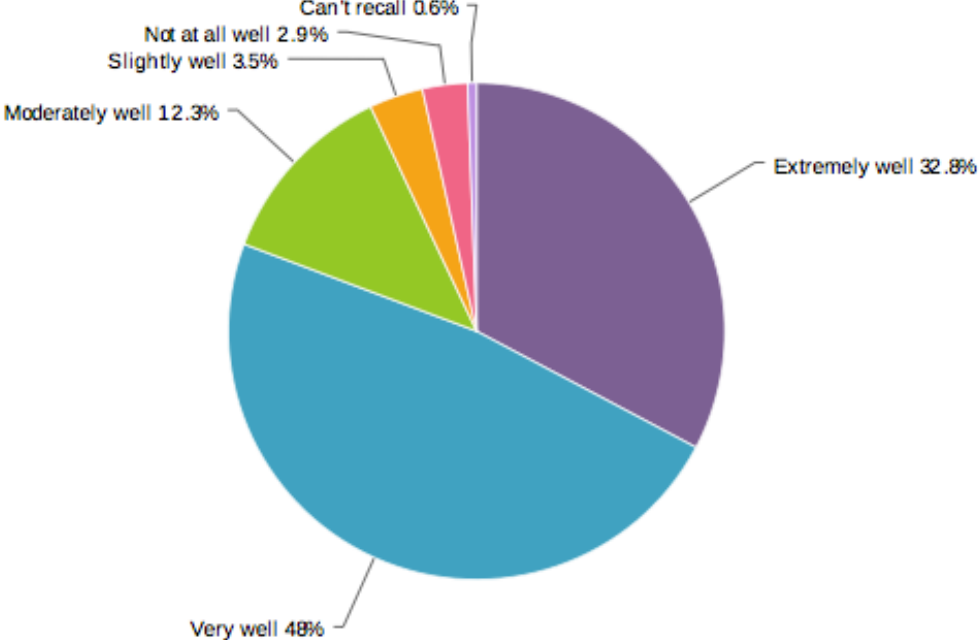
# CUSTOMER SERVICE QUALITY

Customers find our service to be both quickly and well solved overall.

### Speed of problem solved



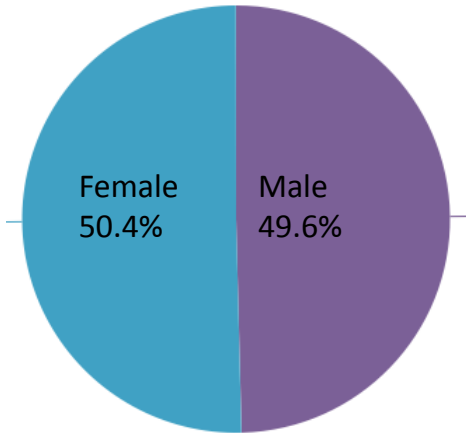
### Quality of problem solving



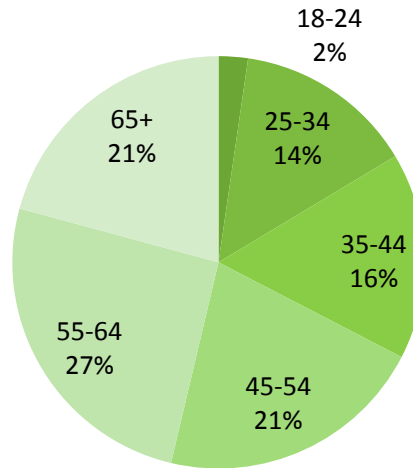
# **GENERAL POPULATION SURVEY DEMOGRAPHICS**

# General Population Demographics

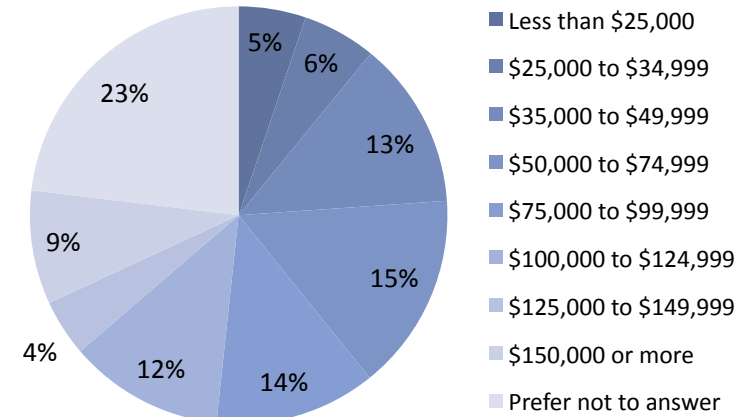
## Gender



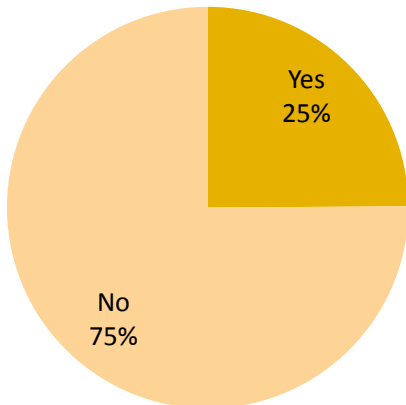
## Age



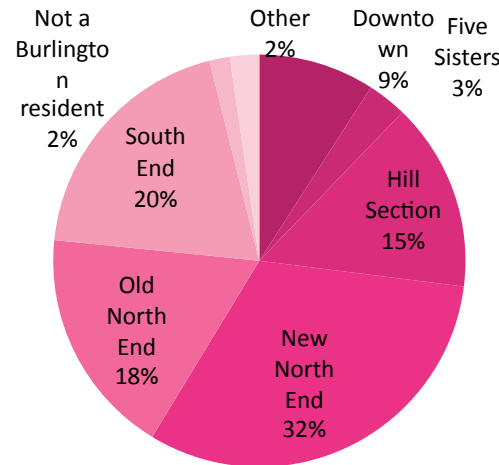
## Income



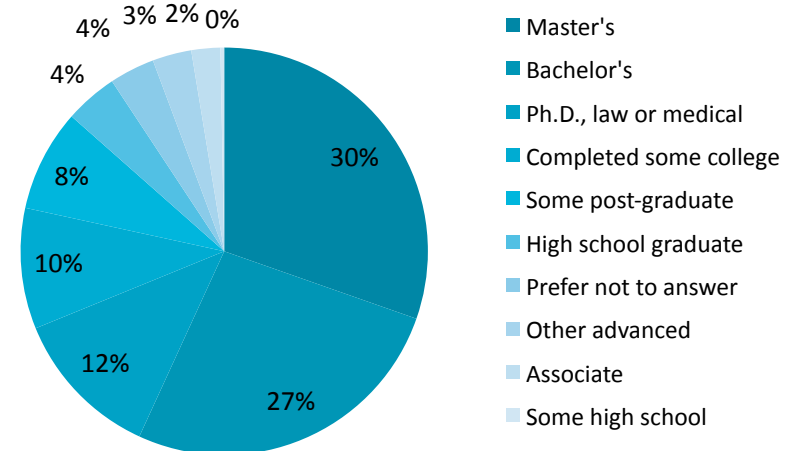
## Children in household



## Neighborhood

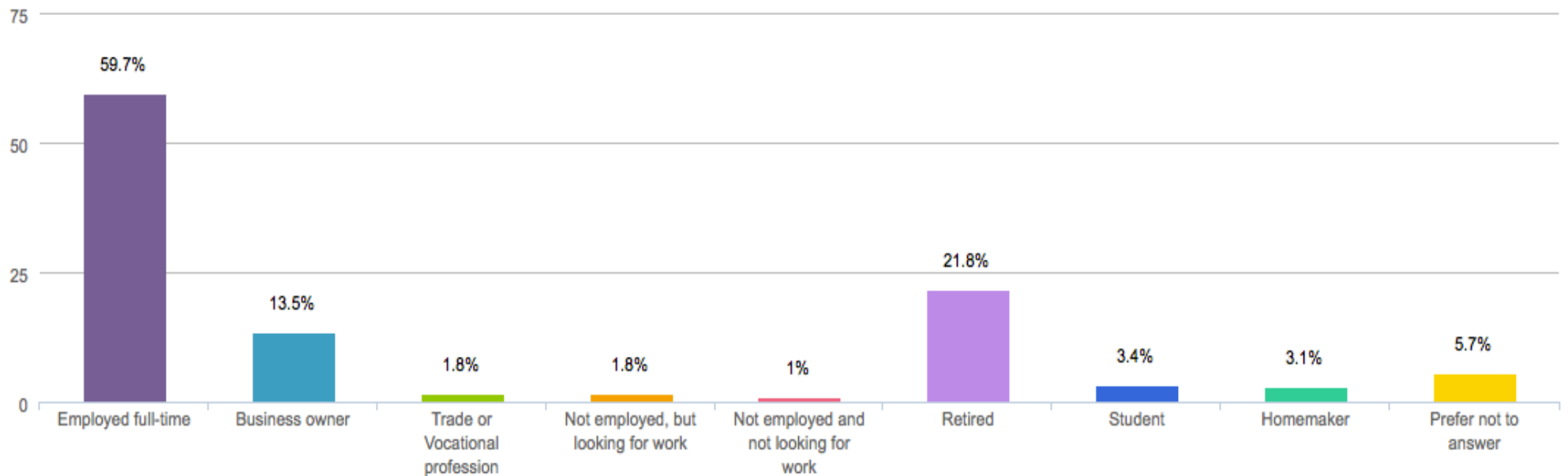


## Education



# General Population Demographics

## Profession (check all that apply)



# Burlington Telecom