

DRAFT

September 10, 2014

Special Meeting

Members: David Provost, Karen Paul, Pat Robins, Joan Shannon, Vince Brennan and David Parker (arrived at 5:50 p.m.)

Member's Absent: None

Others Present: Stephen Barraclough, Amber Thibeault, Nick Martin and Stacey Trudo and Gillian Wildfire

Public Members:

Meeting commenced at 5:45 p.m.

1. Agenda

Barraclough: reminded group about the change in the BTAB agenda to remove the executive session and make this a public presentation on the market survey and the technical teach-in.

2. Approval of Minutes from September 3rd BTAB meeting:

MOTION to approve by *Robins*, seconded by *Shannon*. *Unanimous*.

3. Public Forum: None

4. Marketing Survey

Wildfire: discussed presentation regarding two surveys that Burlington Telecom conducted in April 2014. The first survey was general population and the second survey was a customer satisfaction survey.

BT subscribers are very satisfied.

- 88% of BT customers are satisfied with BT services.
- 40% of competitors' subscribers are satisfied. National index of services – internet and cable were in the bottom five with telephone right above these.

Paul: discussion regarding the number of dissatisfied customers between Comcast to BT. Less with BT. This could be a market for us; the number of dissatisfied with Comcast is over 20%.

Wildfire: Video streaming is rising year over year. Internet service is even better than overall service rates.

Barraclough: buying 10x the amount of bandwidth we were buying 4 years ago but the business hasn't grown that much if at all.

Wildfire: Satisfaction with cable services is less than internet. Increasing channel offerings and fixed tiling issues.

- Age range for people with no cable is younger. Older generation take cable services.
- Old North End has less cable than the Hill section and New North End.
- Past BT subscribers (22%) large percentage moved from the service area.
- Overall satisfaction – past BT subscribers more dissatisfied with new service provider.
- Non BT users are hoping for expansion and looking for fast internet.

Provost: Don't associate fast with a gig? *Wildfire* responded that we would love to do education about what 1 Gig means.

Barraclough: Want quality and consistency of service with no degradation. Staff are going to Chattanooga to visit with EPB in October. Incumbent operator is the same in Chattanooga and Burlington. Massive market share with 50%. 1 day with marketing department.

Wildfire: People who have never used BT – pretty neutral, expected negative. Disappointing as we want people aware of us. General impression of services is more positive.

Done the survey three years ago, would have had a different result. Says a lot about what BT, especially the staff, has done to ameliorate those negative impressions.

Wildfire: High percentage of folks who have contacted customer service. Satisfaction overall high.

- Speed of resolution – good. Quality of problem solving is pretty good.

Barraclough: wherever we end on customer service – we set the bar higher next year. Major differentiator with competitors.

Wildfire: Education higher on the survey. Profession high.

Barraclough: 4,740 subscribers in the beginning of FY15, put on 100 subscribers in the first two months of FY15, now at 4840, approaching 5000.

5. Technical Teach-in

Patrie: two parts with the nuts and bolts and the second part is where BT lines up with the competition.

Future of the services we are providing. Landline market at the bottom. Cord cutting in the cable industry. Shedding cable television subscribers for streaming options.

Provost: not seeing any change in phones on the business side? *Parker*: removed phones at Dealer Dot Com. *Provost*: said they are thinking about this. *Parker*: be there in the next five years.

Patrie: Internet is the future of communications industry. 9 out of 10 capital expenditures dollars are spent on broadband infrastructure.

- 18-35 internet only subscribers.
- Charter had 22% internet only customers with Time Warner at 19%. Trending larger so this number has probably increased since 2013.
- Competition in this market is Comcast which is the largest MSO in the US; Direct TV/Dish Network. Landline service is available through Cable company, Fairpoint or BT.
- Broadband internet offered by BT on an all fiber based, Comcast is not fiber to the home, Fairpoint is DSL and Wi-Fi access points that are open and nobody pays for it. Mobile broadband from LTE and fixed wireless broadband also available in Burlington market (VTEL model).
- Becoming viewed as the premier provider in the small to medium business category in Burlington.
- Facing strong competition in the enterprise space (commercial).

Provost: how is HBC funding expansion? *Barracough* partly through debt and through the largest shareholder.

Brennan: Neal Lunderville and Jesse Bridges discussion about lights that have Wi-Fi capabilities – talking about doing this for the parks. Shouldn't they be talking to BT?

Patrie: Fiber is the key driver of technological innovation in communications driving economic and community development in forward thinking communities.

Provost: do you have a summary of builds throughout the US?

Barracough: no but we can do research. EPB has petitioned FCC to expand territory.

Patrie: FTTH best resource for this list.

Brennan: would like to get access to the BED conduits. There are partnerships that are happening across the company. Don't understand the obstacles.

Provost: conversation with Stephen after last meeting. BTAB members expressed concern about sharing information. Appreciate effort that was taken to share more information with the public.

MOTION to adjourn by *Robins* seconded by *Parker* at 6:56 p.m.