

Summary of Findings

In addition to probing general levels of awareness of Access Tucson and the cable channels they operate, this telephone survey of Cox Communications cable subscribers in the City of Tucson, Arizona includes questions regarding subscriber viewership habits, as well as, interest in a host of programming categories. Questions were also asked regarding the respondents' opinions and attitudes about the value of various services and programming options, and how well Access Tucson provides these services.

General Observations & Highlights

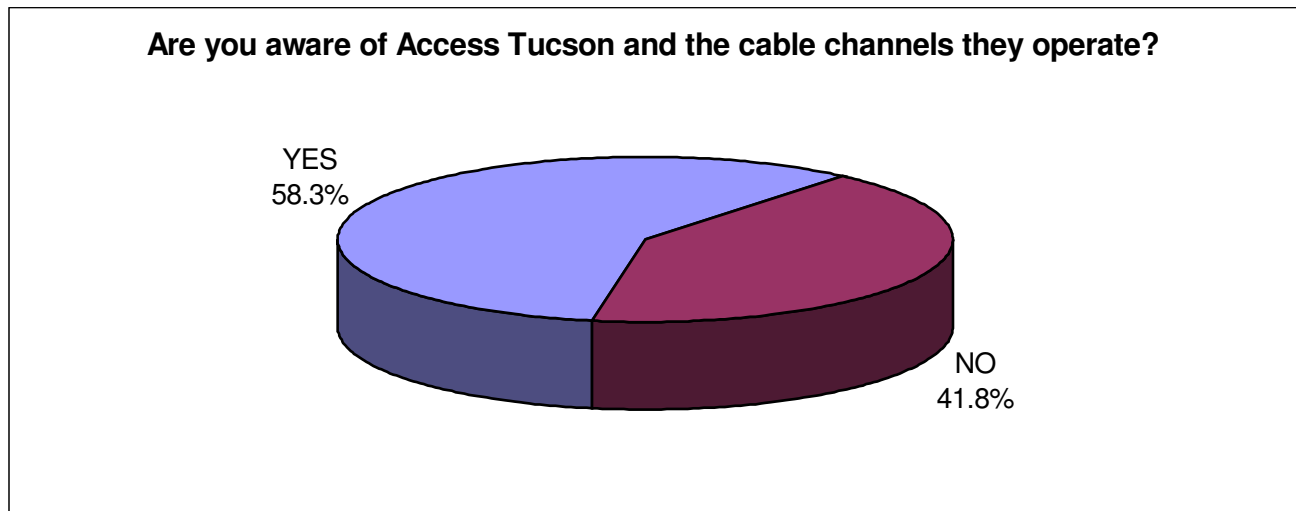
- In general, viewers have a very high regard for Access Tucson and the services provided by it. Specifically:
 - When viewers were asked to grade statements made about the services provided by Access Tucson all five statements tested received A or B grades from well over half of all viewers. Specifically:
 - About 69% give a grade of "A" or "B" when asked if Access Tucson "provides programming that shows diverse points of view."
 - About 68% give a grade of "A" or "B" when asked if Access Tucson "provides an outlet for individuals to freely express themselves."
 - About 62% give a grade of "A" or "B" when asked if Access Tucson "provides a valuable community service."
 - About 57% give a grade of "A" or "B" when asked if Access Tucson "provides programming assistance so local groups can publicize their services."
 - About 57% give a grade of "A" or "B" when asked if Access Tucson "provides programming that deals with local issues."
 - No service tested received grades of "D" or "E" from more than about 10% of viewers.
 - Just under 20% of all viewers said that Access Tucson had "gotten better" over the last year or two, while just about 8% said it had "gotten worse." A ratio of better than 2 to 1.
 - More than 75% of all respondents think it is either Very or Somewhat Important to have cable channels that feature local community programming.

Access Tucson – Viewership Survey - 2006

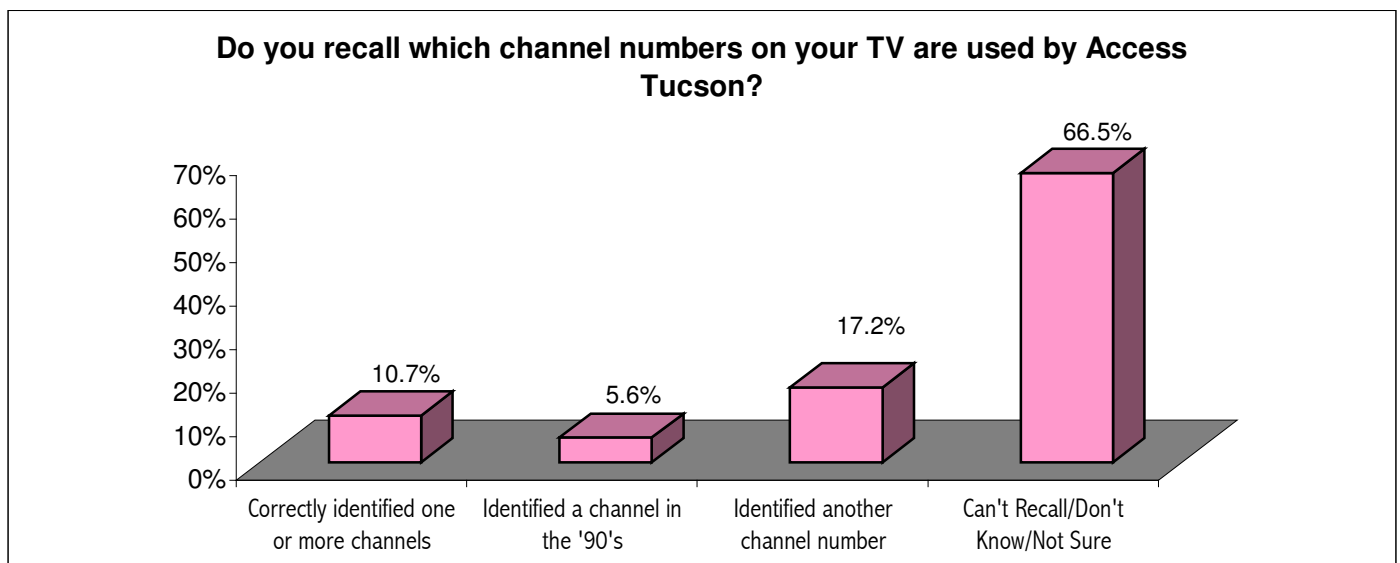
- When respondents are asked how much of their monthly cable bill should go to support local programming, about 60% felt that some portion of their cable bill should be used and just under half felt at least two dollars should be used. The average or mean of all responses was \$1.70.
- Awareness of Access Tucson and its cable channels appears to be high:
 - Almost 60% of all cable subscribers in the City of Tucson are aware of Access Tucson.
 - Those who are aware of Access Tucson are more likely to be: younger, report higher levels of household income and be regular voters.
- Viewership of Access Tucson channels also appears to be quite strong and stable:
 - About 30% of all cable subscribers have watched programming on Access Tucson.
 - Over half of all viewers watch at least a few times per month. Almost 30% watch at least a few times per week.
 - When they watch, just under 60% usually watch for more than 10 minutes.
- When asked how interested they would be in watching each of 10 different categories of programming, respondents are, generally, most interested in watching *political debates & election information*, followed closely by *live concert programs* and *programs about local history*.
- When respondents were asked about their awareness and viewership of three commercial cable channels:
 - Spike TV received the highest level of awareness and viewership. This channel was followed by Cox 7 Arizona and The military Channel (on the digital lineup).
 - Access Tucson channels received statistically comparable levels of awareness as Spike TV and is watched by about as many cable subscribers as Cox 7 Arizona and more cable subscribers, generally, than The Military Channel.
- About two-thirds of all respondents have access to a computer that they use to access the Internet. About 7% of these respondents report having seen the Access Tucson website.

Awareness of Access Tucson

Almost six out of ten (58.3%) all survey respondents indicated that they are “aware of Access Tucson and the cable channels they operate.”

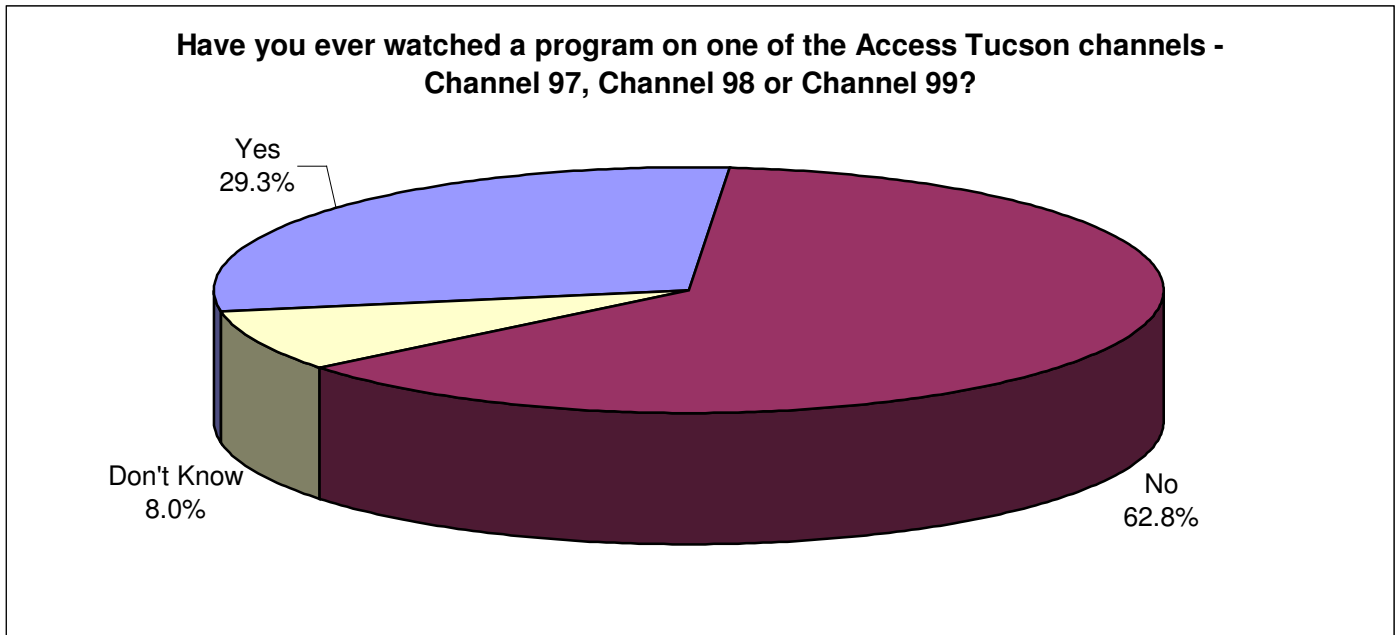


37.3% of these respondents, when asked, thought they could recall which channel numbers are used by Access Tucson. However as shown below, 10.7% of those who are aware of Access Tucson were able to correctly identify at least one of the three channels, Channel 97, 98 or 99. Another 5.6% identified a channel in the '90's. 66.5% could not recall or didn't know. The balance (17.2%) identified an incorrect channel number.

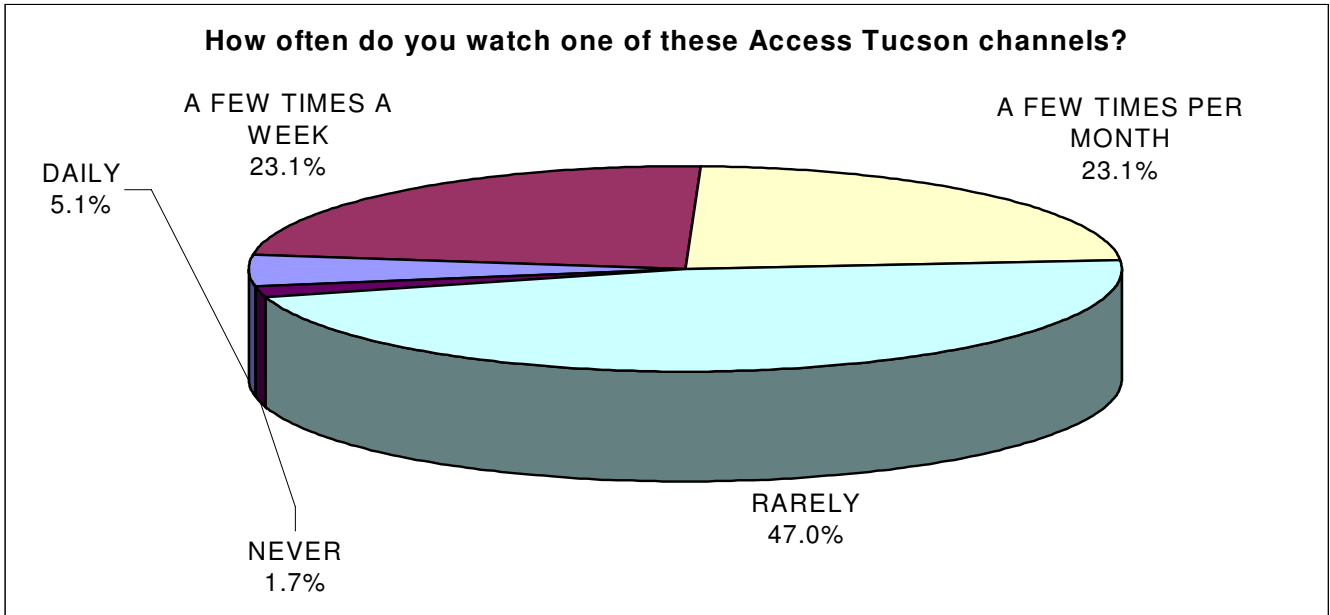


Viewership of Access Tucson

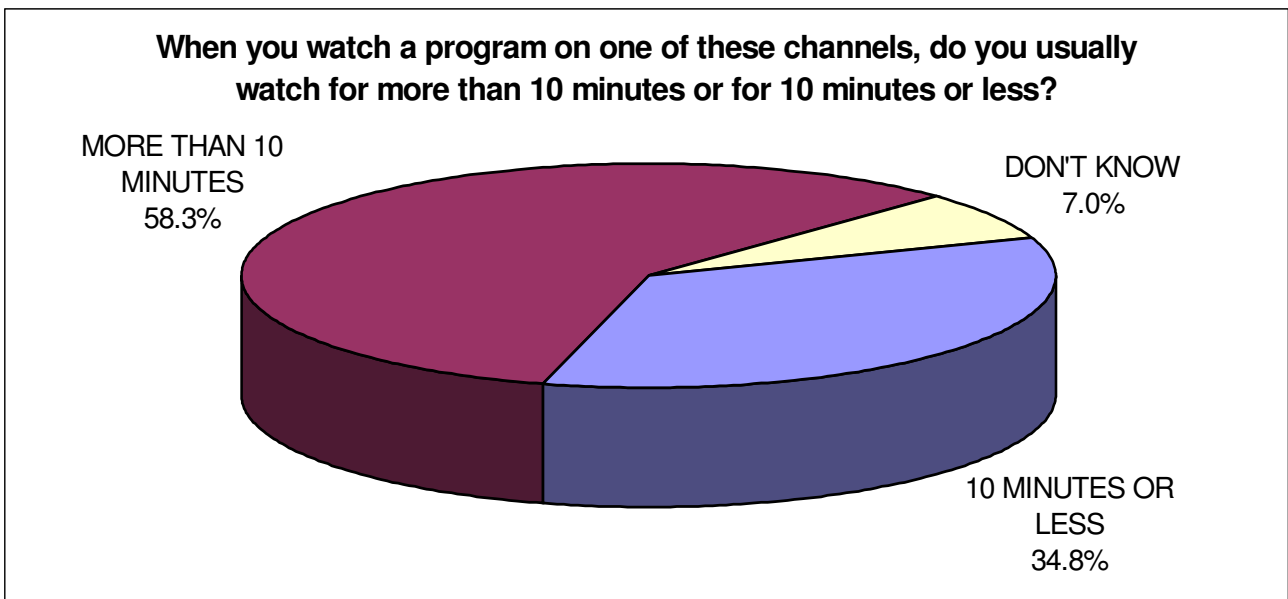
As shown below, about three out of 10 (29.3%) of all Cox cable subscribers said that they had "ever watched a program on one of the Access Tucson channels.



Viewers were then asked two questions to better understand their viewership patterns and habits as they relate to Access Tucson. First, almost three out of 10 viewers (28.2%) watch Access Tucson channels at least “a few times per week” and just over half (51.3%) watch at least “a few times per month.” The graph on the following page illustrates.

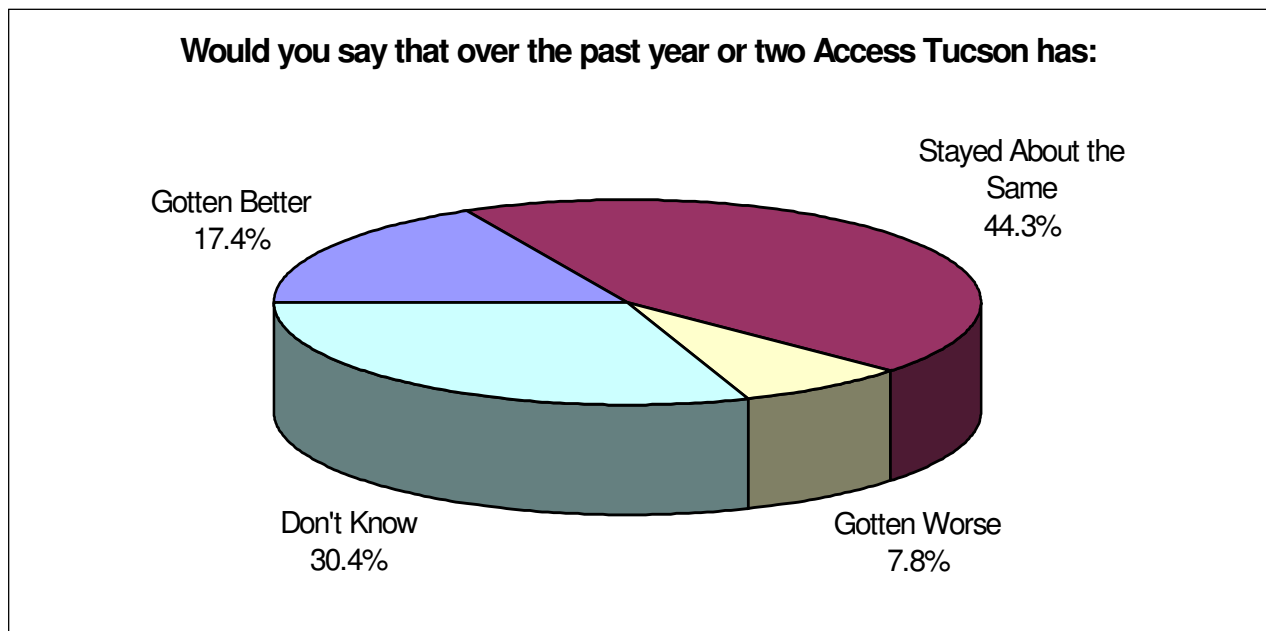


Second, when viewers watch a program on one of the Access Tucson channels, just under six out of 10 (58.3%) usually watch for *more than 10 minutes* with just under one-third (32.4%) watching for *10 minutes or less*, demonstrating that the majority of viewers aren't simply "clicking through" these channels to get to another channel.



Access Tucson - Services, Importance & Value

Viewers were asked if "over the past year or two Access Tucson has: *gotten better*, *stayed about the same* or *gotten worse*." By a ratio of just over 2 to 1 viewers feel the channel has gotten better (17.4%) rather than gotten worse (7.8%). The balance of the viewers either felt the channel stayed about the same (44.3%) or didn't know (30.4%). The graph below illustrates.



Access Tucson viewers were then given a series of statements and asked to grade how well each statement described "the services provided by Access Tucson." An A,B,C,D,E grading scale was used with an "A" meaning "extremely well" and an "E" meaning "not at all."

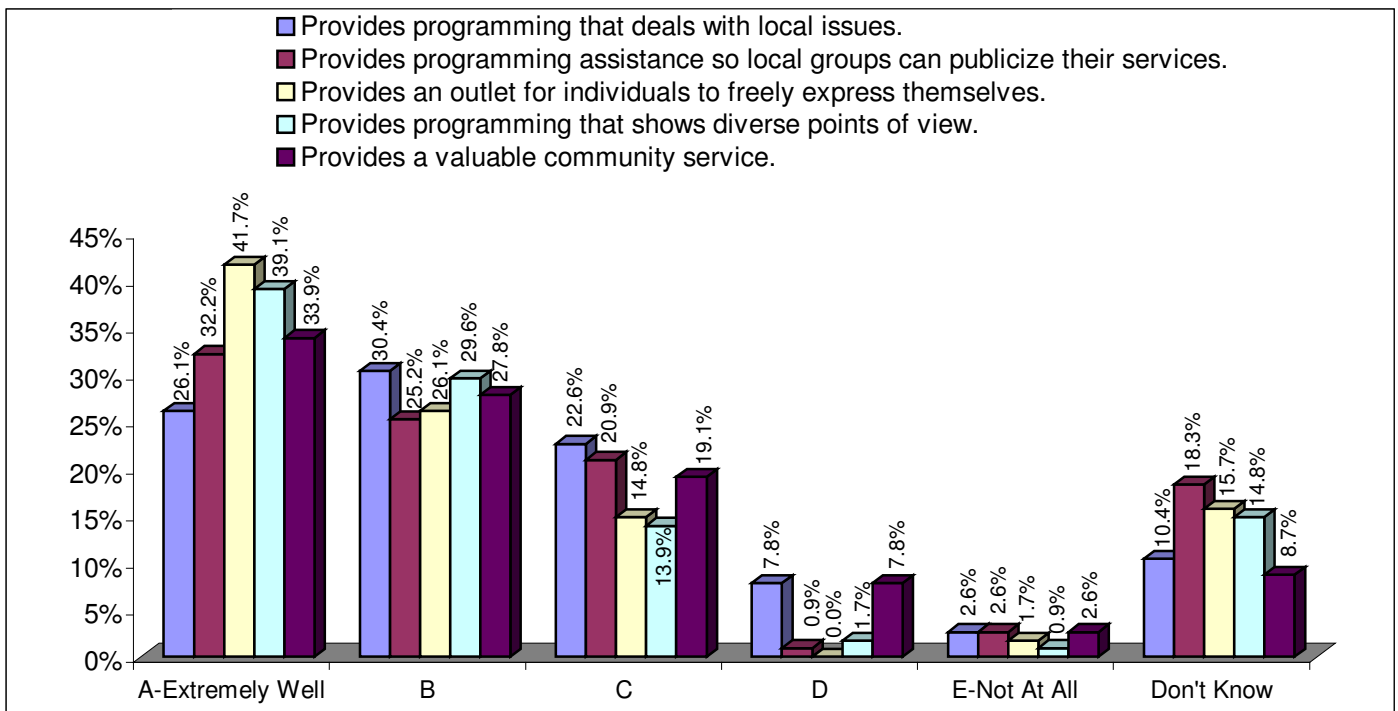
In general, viewers appear to have a very high regard for Access Tucson and the services provided by it. As shown by the graph on the following page, **all five** of the statements tested received a grade of "A" or "B" from well over half of all viewers.

Access Tucson – Viewership Survey - 2006

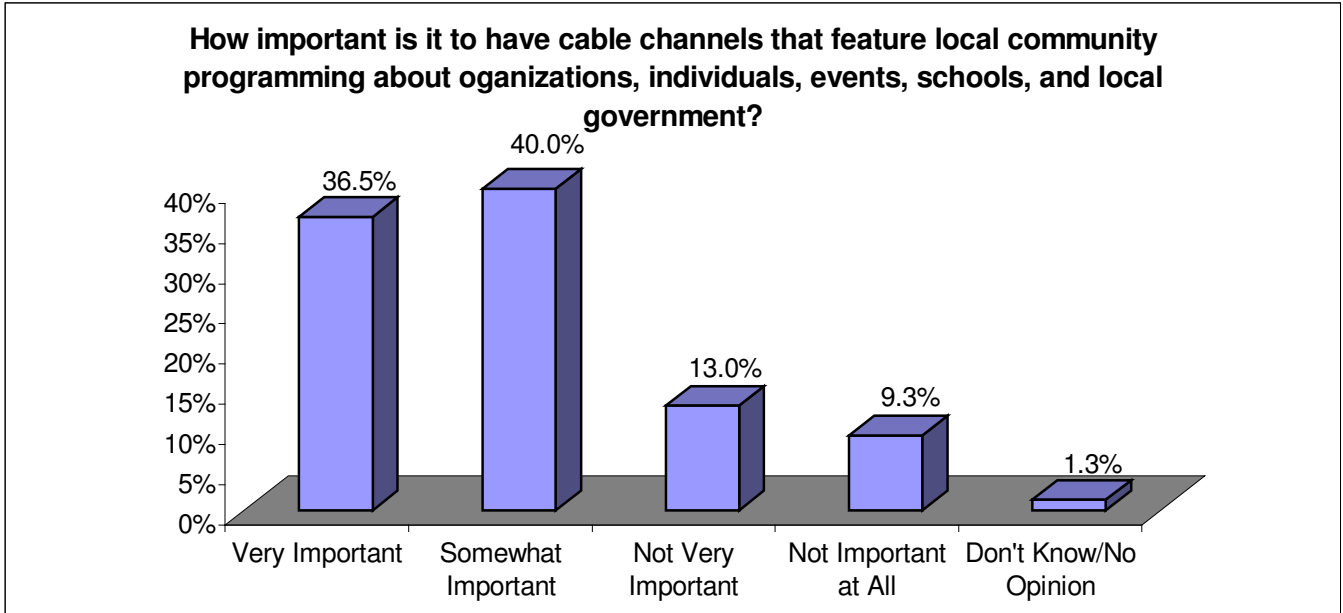
Further, three out of the five tested: *provides an outlet for individuals to freely express themselves, provides programming that shows diverse points of view and provides a valuable community service*, received a grade of “A” or “B” from over **60%** of all viewers (67.8%, 68.7% and 61.7%, respectively).

Finally, less than 11% of all viewers gave a grade of “D” or “E” to **any** statement tested. The graph below illustrates.

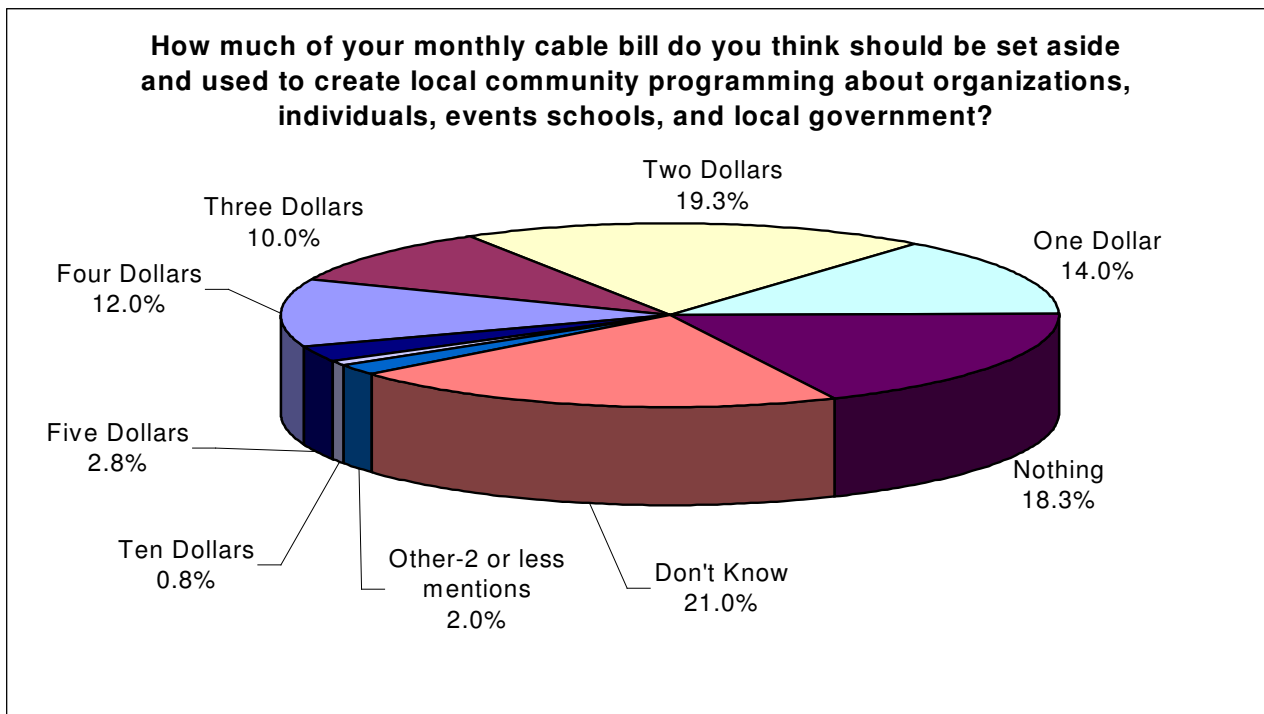
Using an A,B,C,D,E grading scale -- where “A” means “extremely well” and “E” means “not at all” - please give a grade for how well each of the following statements describe the services provided by Access Tucson.



All respondents, viewers and non-viewers, were then asked how important it is “to have cable channels that feature local community programming about organizations, individuals, events, schools, and local government.” As shown by the graph on the following page, just over three-fourths of all respondents (76.5%) believe it is either “very important” or “somewhat important” to have these cable channels.



Finally, a question was asked of all subscribers to determine how much of their cable bill they felt should be set aside and used to create local community programming. As shown below, 60.8% of these respondents indicated that some portion of their cable bill should go to support the development of this programming and 46.3% felt that at least two dollars per month should be set aside.



Access Tucson – Viewership Survey - 2006

When all responses from respondents are calculated to find the mean or average amount favored, the result is an average of **\$1.70**. This was calculated using a value of \$0.00 for those who said “*nothing*” or “*don’t know*” and using an average cable bill amount of \$40.00 to calculate an amount for those respondents who gave an answer relating to a percentage of a bill, e.g., “*10 percent*,” “*twenty percent*,” etc.

Interest in Future Programming Content & Services

All respondents were asked a series of questions about the types or categories of programming that they would be most interested in watching on Access Tucson channels. A scale of 1 to 5 was used with a “5” being “very interested” and a “1” being “not interested at all.” The category receiving the greatest number of "very interested" responses from all respondents was *political debates & election info* (23.5%), followed closely by *live concert programs* (22.8%) and *programs about local history* (22.5%). The table below illustrates.

O.K., I'm going to read a brief list of categories or types of programming that could be shown on Access Tucson channels. After each, please tell me whether you would be interested in watching this type of programming on a scale of "1" to "5" with "5" being "Very Interested" and "1" being "Not Interested at All."						
	Very Interested "5"	"4"	"3"	"2"	Not Interested at All "1"	Don't Know
Political debates & election information	94 23.5%	68 17.0%	87 21.8%	50 12.5%	99 24.8%	2 0.5%
Live concert programs	91 22.8%	86 21.5%	118 29.5%	31 7.8%	70 17.5%	4 1.0%
Programs about local history	90 22.5%	99 24.8%	100 25.0%	51 12.8%	59 14.8%	1 0.3%
Health & fitness programs	80 20.0%	76 19.0%	108 27.0%	49 12.3%	86 21.5%	1 0.3%
Programs about local arts & artists	64 16.0%	84 21.0%	115 28.8%	59 14.8%	77 19.3%	1 0.3%
Ethnic & cultural programs	61 15.3%	56 14.0%	107 26.8%	57 14.3%	117 29.3%	2 0.5%
Info on local community service orgs	61 15.3%	71 17.8%	113 28.3%	52 13.0%	97 24.3%	6 1.5%
Free speech & personal opinion programs	47 11.8%	51 12.8%	76 19.0%	65 16.3%	156 39.0%	5 1.3%
Church services & spiritual programs	43 10.8%	57 14.3%	87 21.8%	62 15.5%	149 37.3%	2 0.5%
Live call-in shows	26 6.5%	25 6.3%	70 17.5%	63 15.8%	209 52.3%	7 1.8%

Further, to better understand viewership dynamics and to facilitate management discussion of future audience and viewership growth for the Access Tucson channels, analysis was conducted by dividing the sample into three separate groups, defined as follows.

The first group are respondents who have seen programming on Access Tucson channels. These “viewers” of Access Tucson programming account for 117 respondents out of the total of 400 and represent 29.3% of the sample. The second group are respondents who are aware of Access Tucson, but are not viewers (they have not seen programming on Access Tucson). These respondents who are “aware but non-viewers” of Access Tucson account for 130 respondents out of the total of 400 and represent 32.5% of the sample. The third group are respondents who are both unaware of Access Tucson, and are not viewers. These respondents who are “unaware and non-viewers” of Access Tucson account for 153 respondents out of the total of 400 and represent 38.3% of the sample.

Respondents across all categories rate *live call-in shows* as the programming category considered the least interesting. However, while viewers rate *programs about local history* as the most interesting, non-viewers rate *political debates & election information* as most interesting.

Further, when looking at the top four programming categories first ranked by the number of respondents giving a “5-Very Interested” rating then ranked by combining the “5-Very Interested” rating and the “4” rating, additional meaningful differences emerge between viewers, non-viewers who are aware of Access Tucson and non-viewers who are unaware of Access Tucson. The tables on the following page illustrate.

Viewers **Aware / Non-viewers** **Unaware / Non-viewers**

Ranking based upon % giving a “5-Very Interested” rating

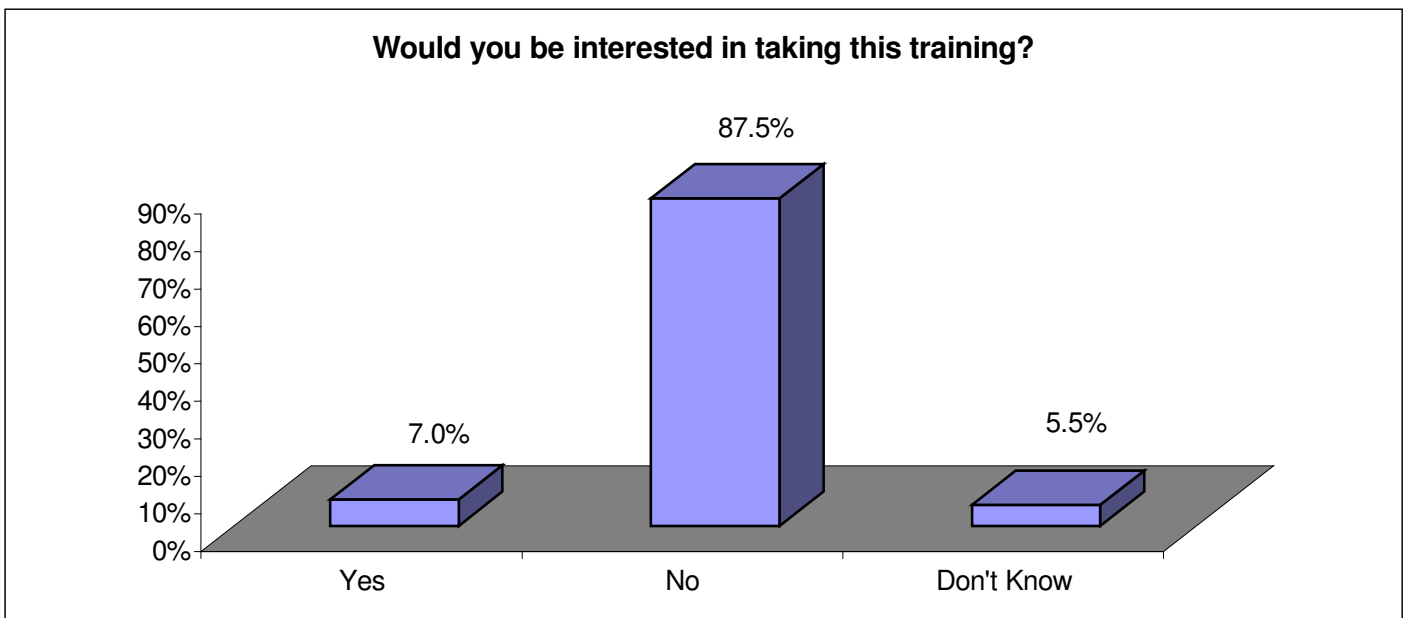
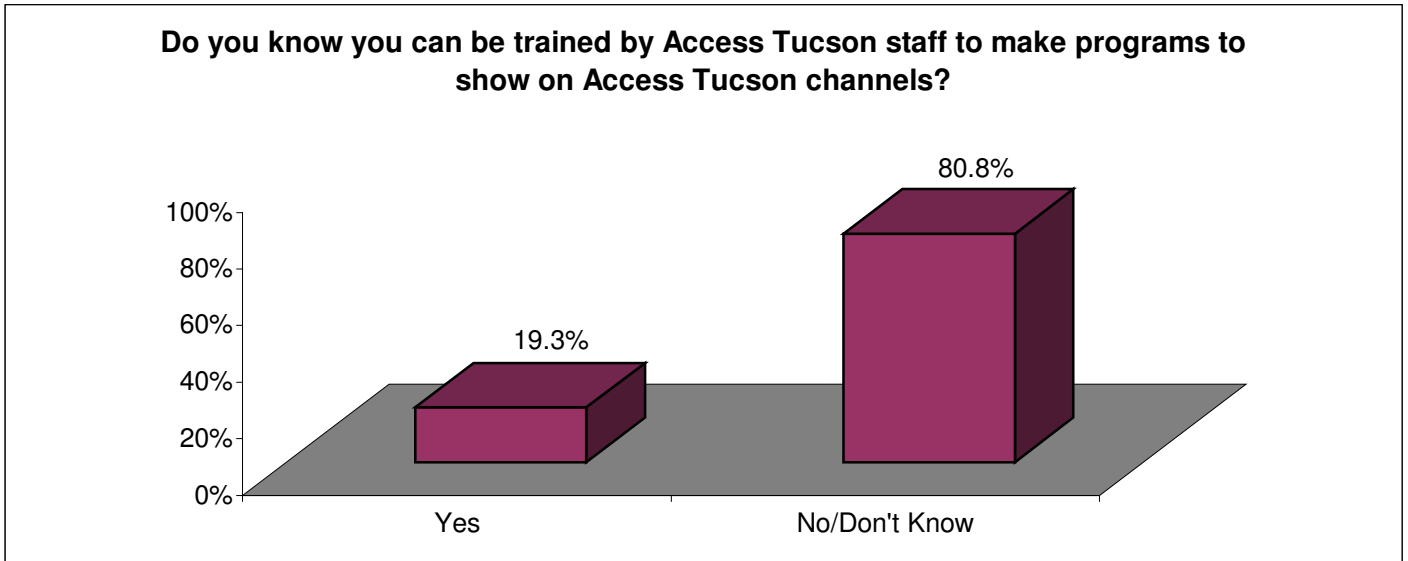
1. Local History Programs 38.5%	1. Local History Programs 18.5%	1. Candidate/Election Info 22.9%
2. Live Concert Programs 32.5%	1. Candidate/Election Info 18.5%	2. Live Concert Programs 21.6%
3. Art & artist Programs 29.9%	3. Health & fitness prgrms 16.2%	3. Health & fitness prgrms 20.3%
3. Candidate/Election Info 29.9%	4. Live Concert Programs 15.4%	4. Local History Programs 13.7%

Ranking based upon % giving a “5-Very Interested” or “4” rating

1. Local History Programs 59.8%	1. Local History Programs 48.5%	1. Live Concert Programs 36.6%
2. Live Concert Programs 57.3%	2. Live Concert Programs 41.5%	1. Local History Programs 36.6%
2. Art & artist Programs 57.3%	3. Candidate/Election Info 36.9%	3. Candidate/Election Info 35.3%
4. Local Services Info 55.6%	4. Health & fitness prgrms 35.4%	4. Health & fitness prgrms 33.3%

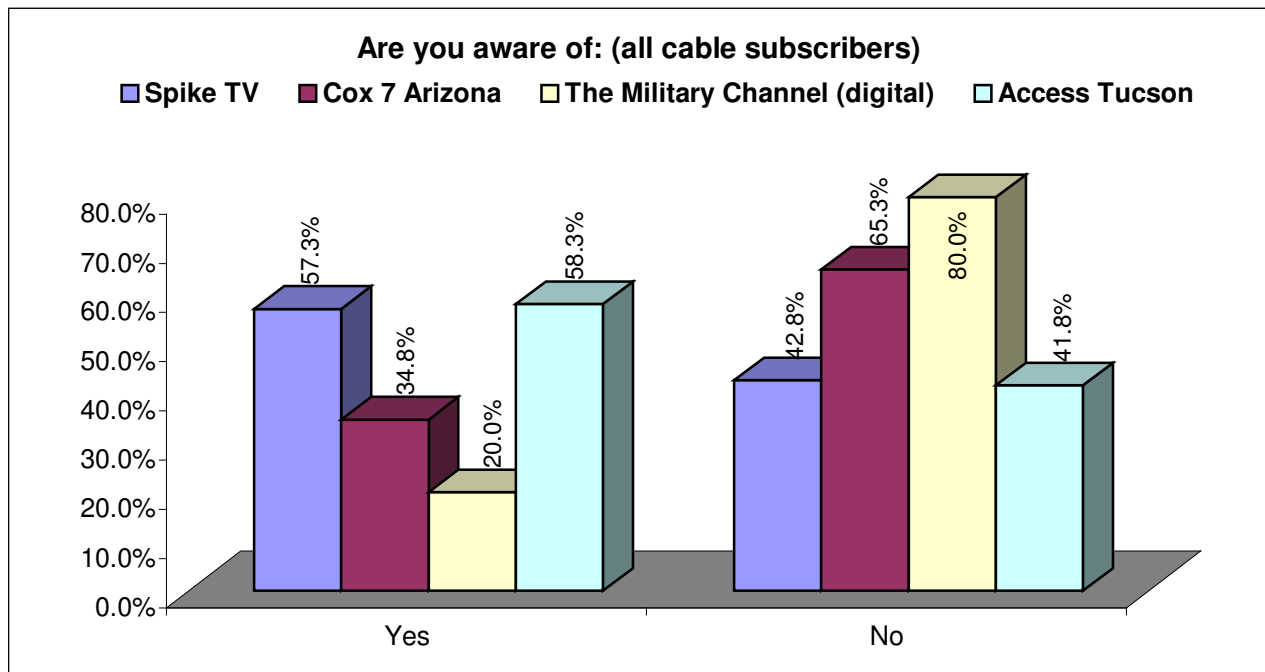
Video Production Training - Interest & Use

Respondents were asked two questions regarding Access Tucson's training and production facilities. As shown below, about 20% (19.3%) know they can be trained by Access Tucson staff to make programs to show on Access Tucson channels and 7% would be interested in taking this training.



Awareness & Viewership of Other Channels

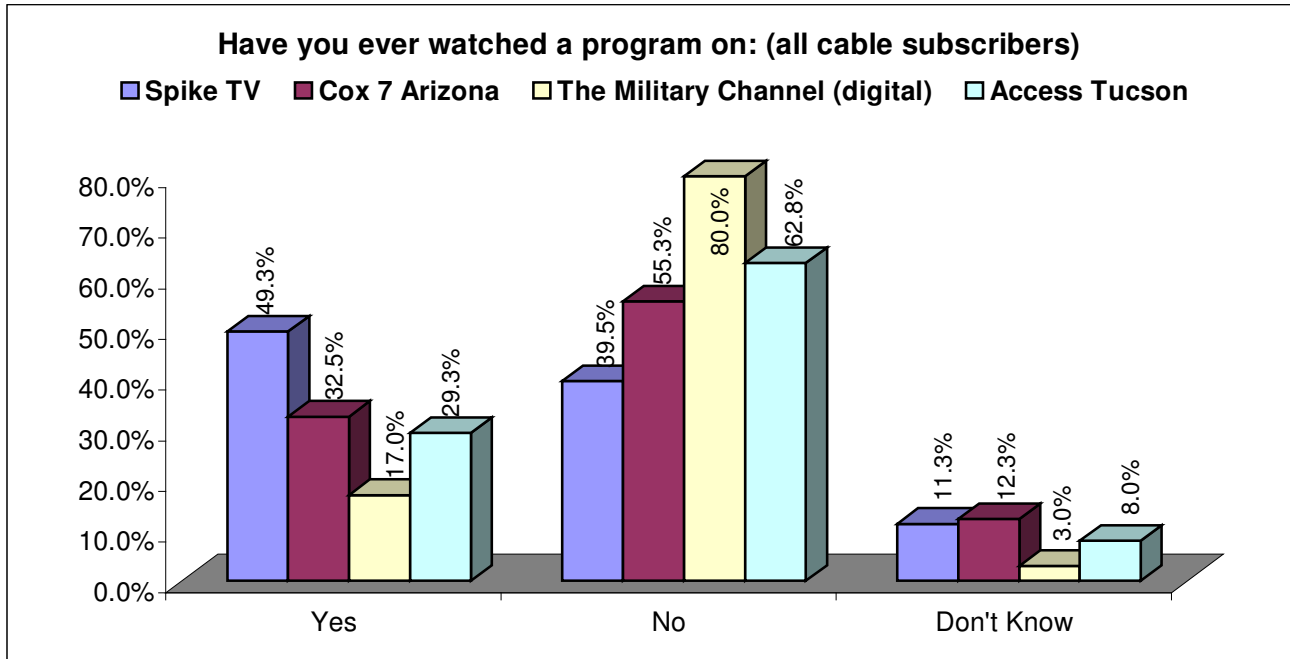
All respondents were asked several questions about their awareness and viewership of three different commercial cable channels. The channels tested are: Spike TV, Cox 7 Arizona and The Military Channel. Almost six out of 10 (57.3%) of all respondents are aware of Spike TV. Just over one-third (34.8%) of all respondents are aware of Cox 7 Arizona and 47.3% of Cox digital subscribers (representing 20% of all respondents) are aware of The Military Channel. Interestingly, only Spike TV generates awareness ratings that are statistically similar to Access Tucson. The graph below, which also includes the awareness ratings of Access Tucson for reference, illustrates.



About half (49.3%) of all respondents have watched a program on Spike TV, just under one-third (32.5%) have watched a program on Cox 7 Arizona and 40.2% of digital subscribers (representing 17% of all respondents) have watched a program

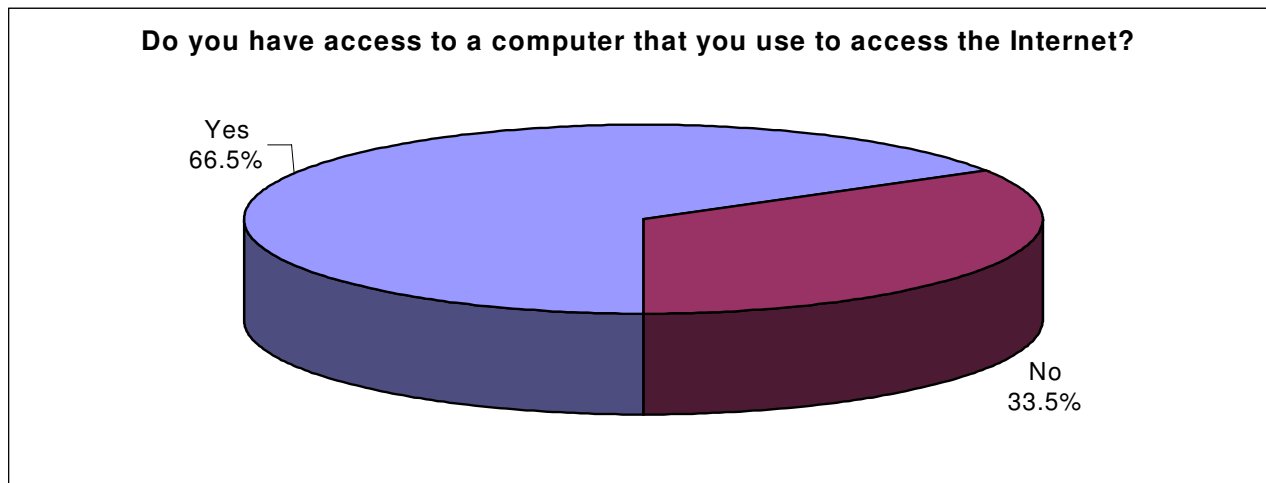
Access Tucson – Viewership Survey - 2005

on The Military Channel. The graph below illustrates, with Access Tucson viewership ratings again included for reference.

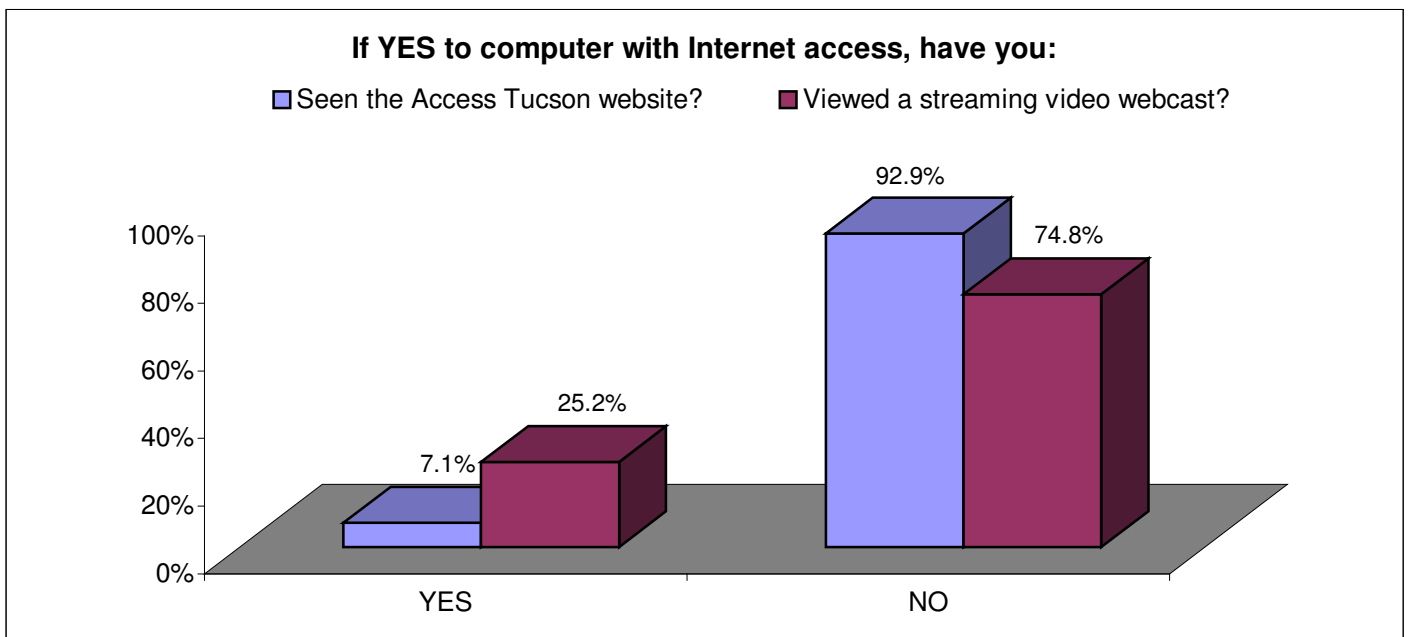


Computer & Internet Use

As shown below, about two-thirds (66.5%) of all respondents have access to a computer that is used to access the Internet.



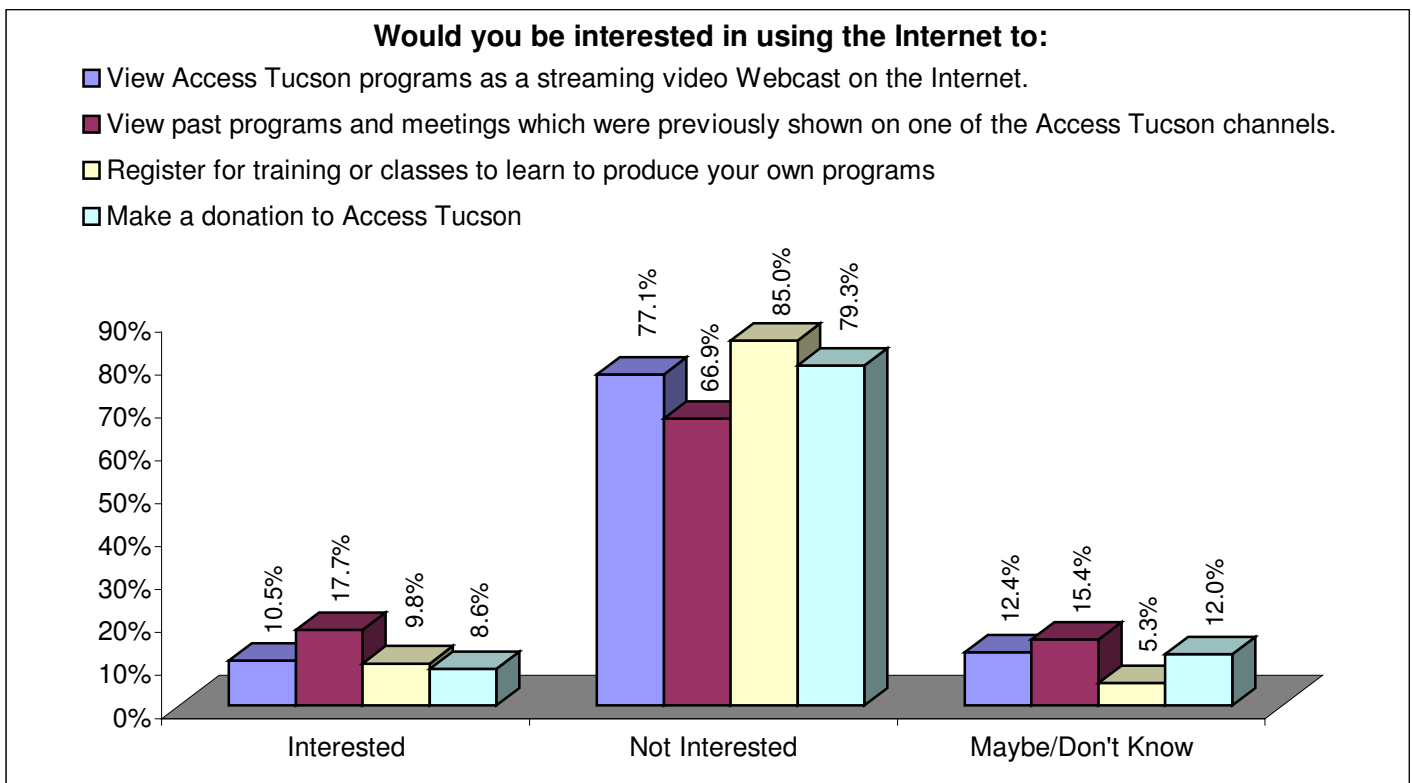
As shown below, of those with access to a computer, 7.1% have seen the Access Tucson website and 25.2% have viewed a streaming video webcast on the Internet.



Access Tucson – Viewership Survey - 2005

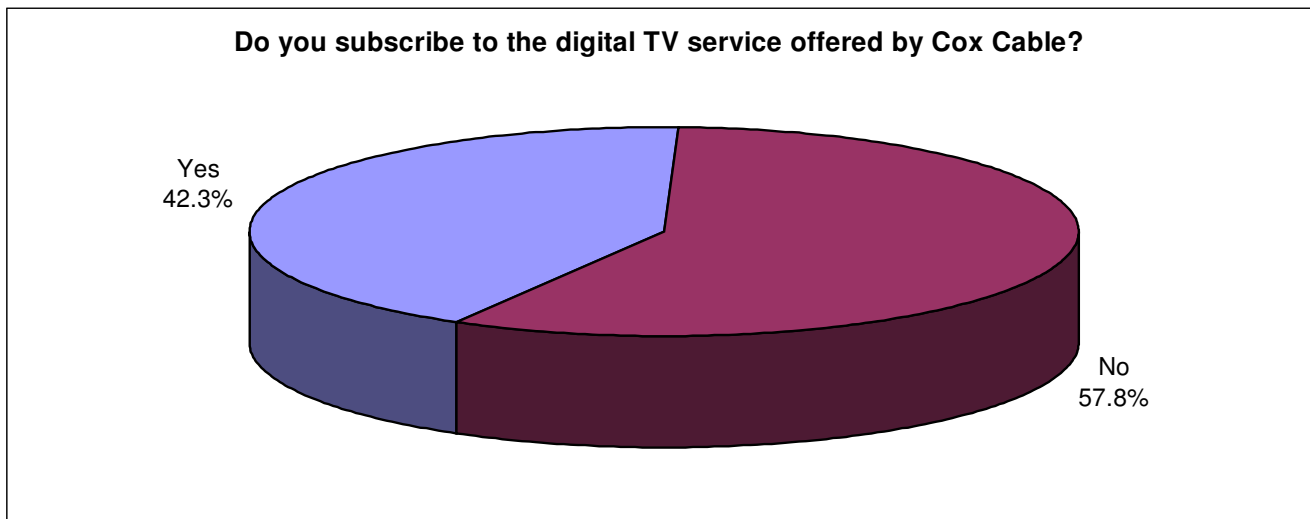
11.9% of those who have viewed a streaming video webcast (representing just 3% of those who have access to a computer) have viewed a webcast on the Access Tucson website.

Finally, these respondents with computer access were asked several questions relating to the level of their interest in using the Internet to access a number of programs and services. 17.7% of these respondents said they would be interested in the viewing of *past programs and community meetings which were previously shown on one of the Access Tucson channels*. The graph below illustrates.

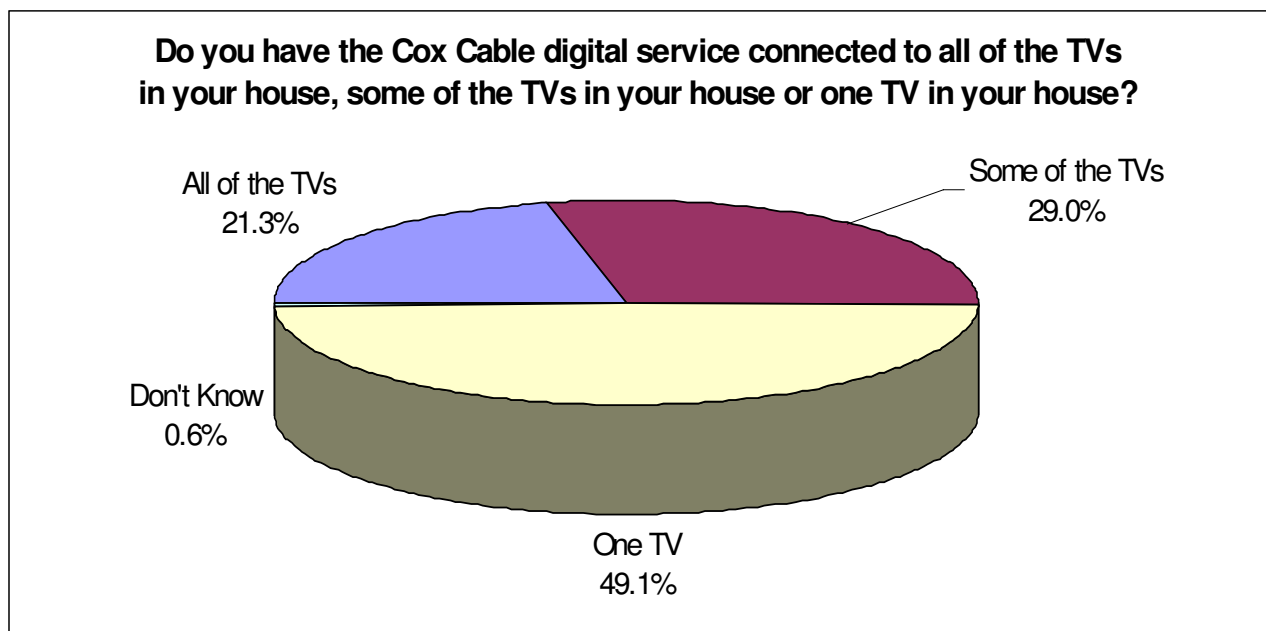


Cox Communications Digital Service

As shown below, 42.3% of cable subscribers indicate they subscribe to the "Digital TV service offered by Cox Cable."



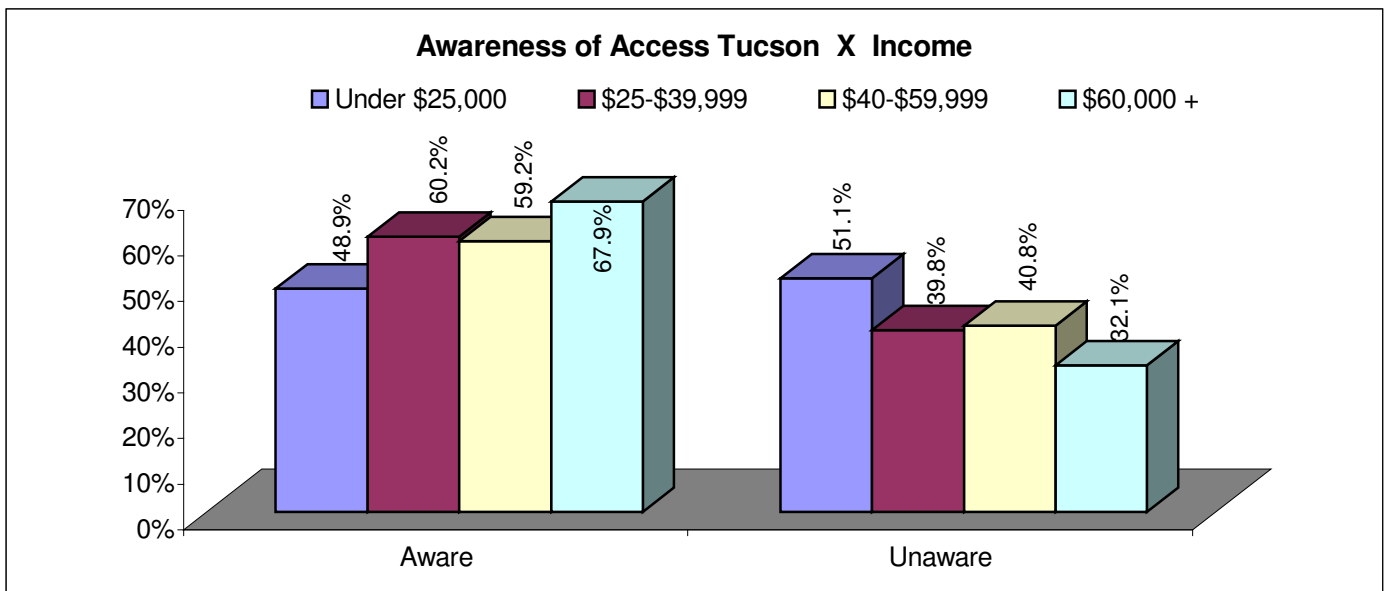
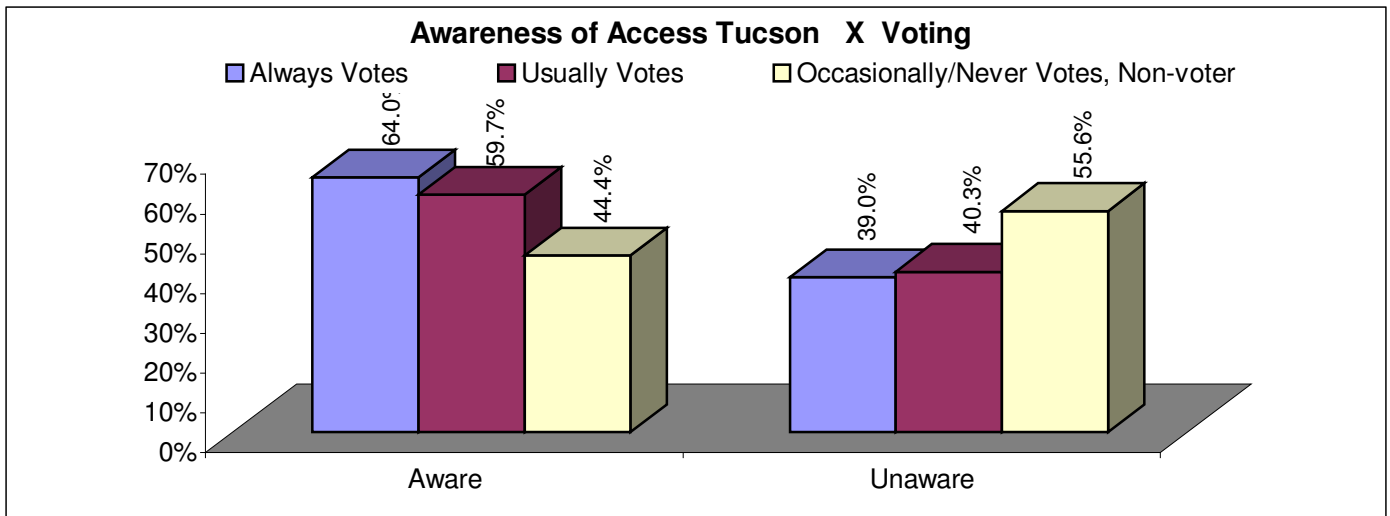
These digital subscribers were then asked if they have the digital service connected to all of the TV's in their home or not. As shown below, just over two out of 10 (21.3%) said it was connected to all TV's.



Demographics

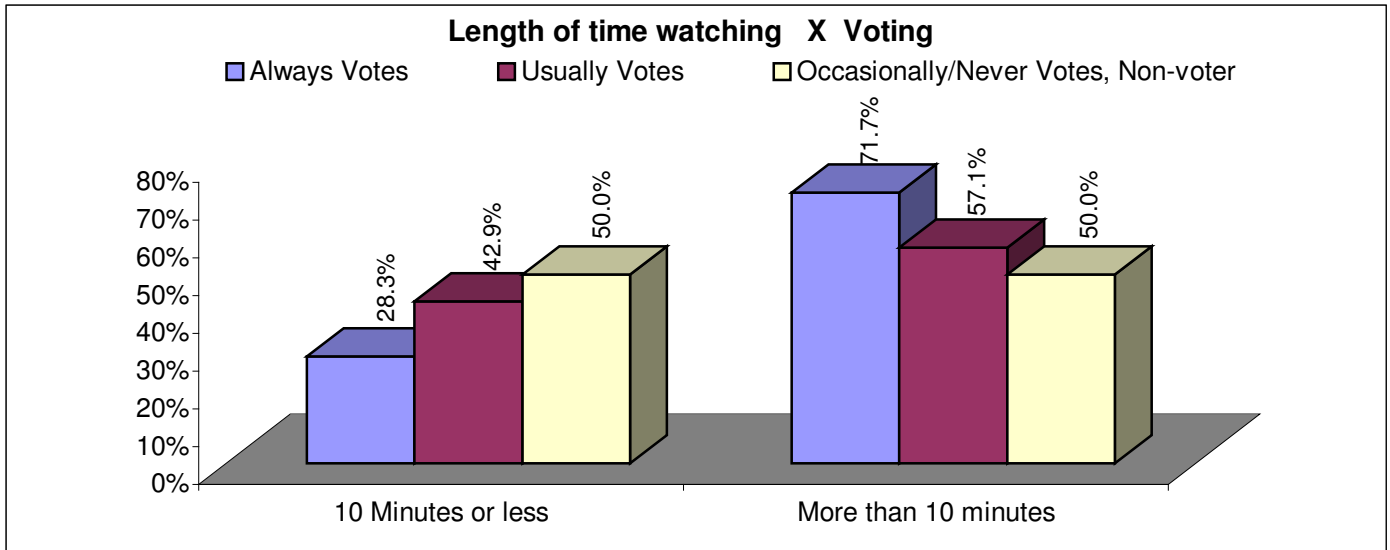
Several demographic questions were asked of all survey respondents to better group the interviews and to discover commonality of opinion and viewership habits within these demographic groups.

For example, those who are aware of Access Tucson are more likely to vote on a regular basis and are more likely to report higher levels of income. The graphs below illustrate.

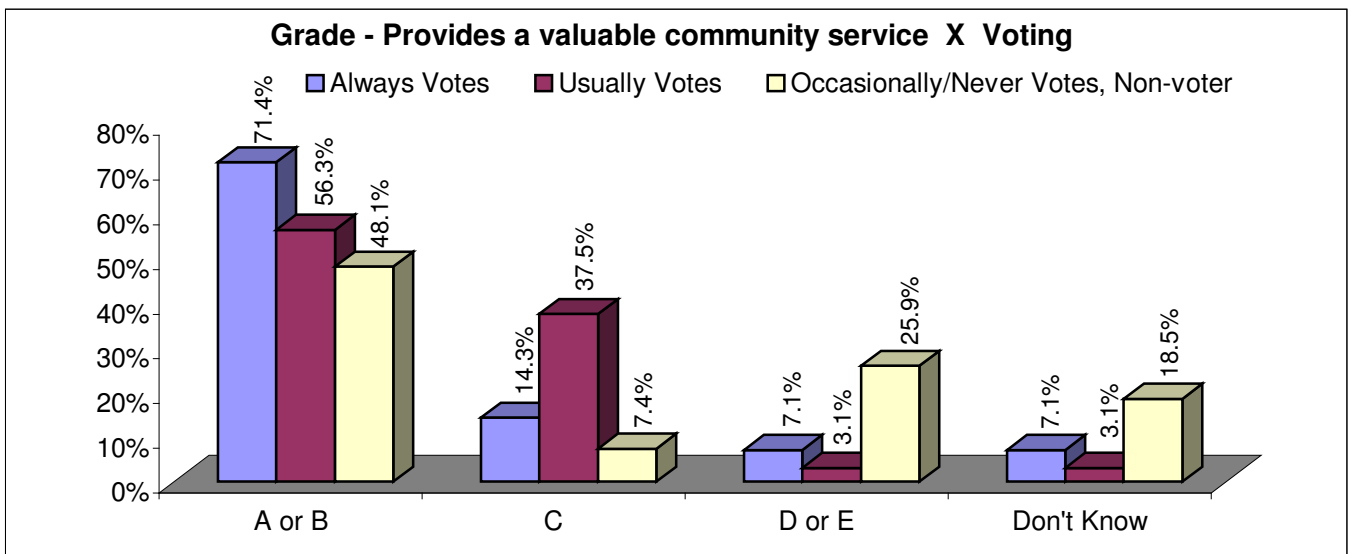


Access Tucson – Viewership Survey - 2005

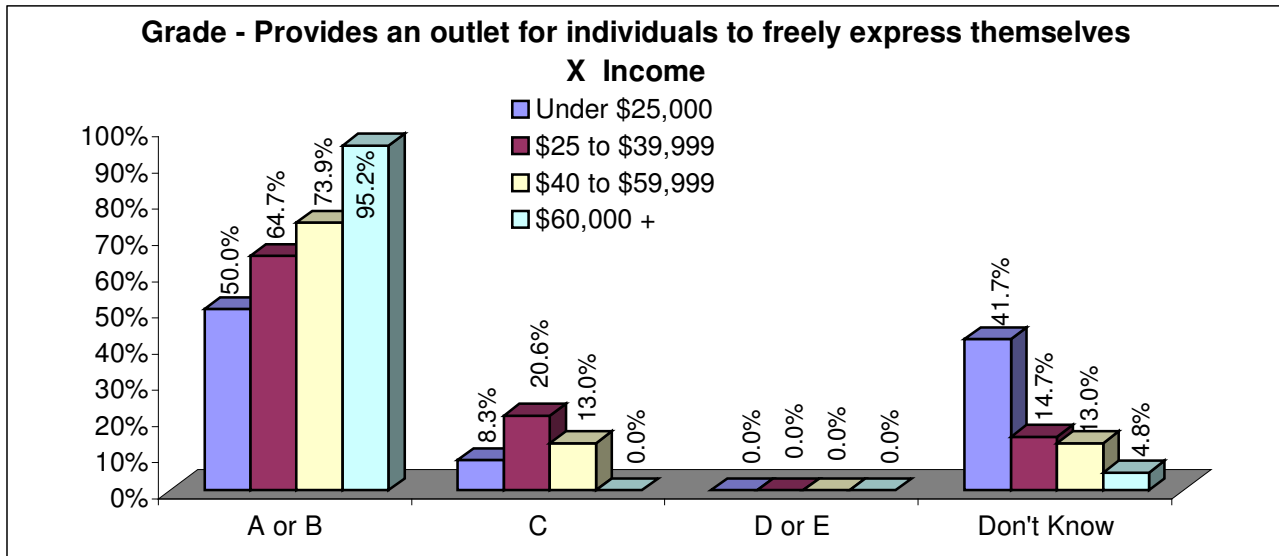
As shown below, when Access Tucson viewers who always or usually vote watch a program on Access Tucson, they are more likely to watch for more than 10 minutes than non-voter viewers.



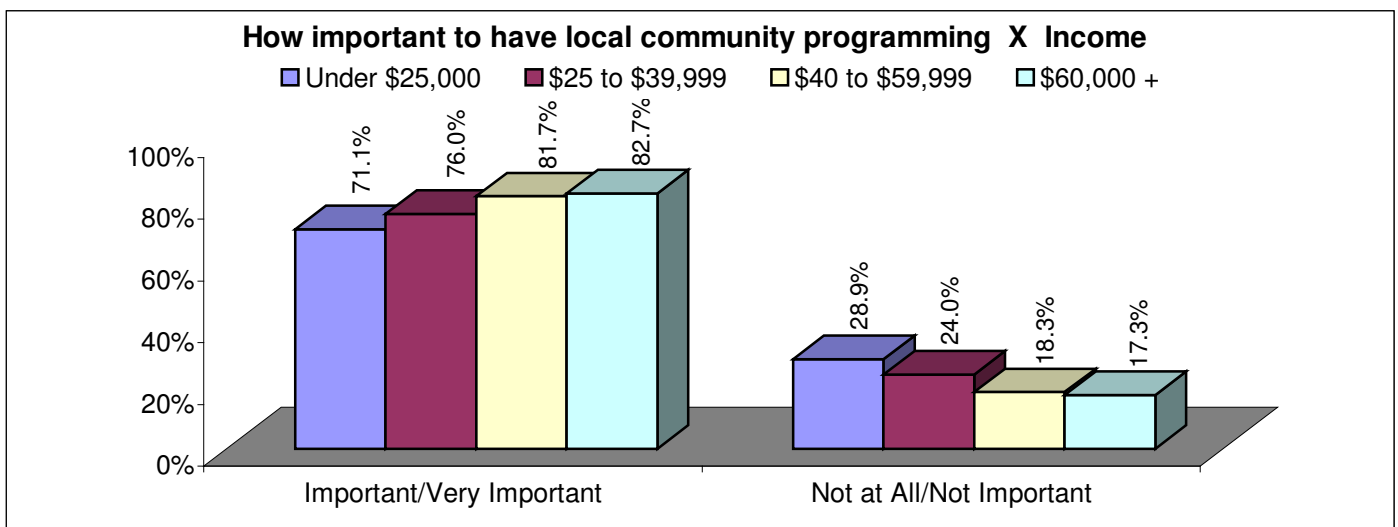
As shown below, viewers who are regular voters are also more likely to give higher grades when asked to rate how well Access Tucson provides a valuable community service.



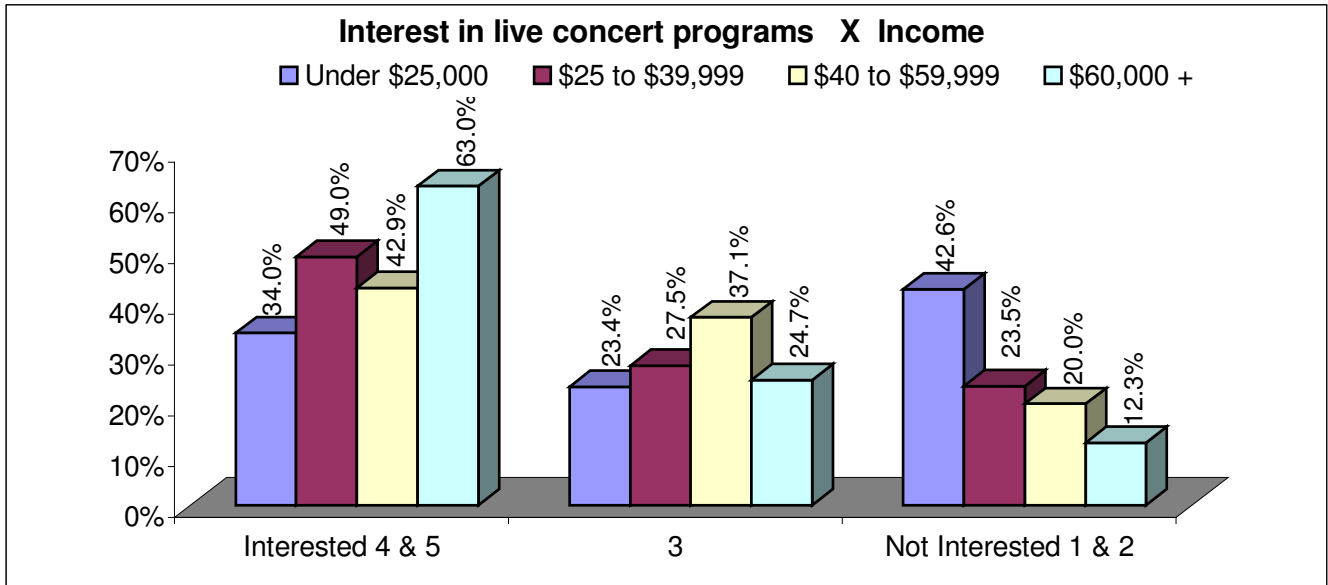
When asked to grade several different services and how well Access Tucson provides them, viewers who report higher levels of household income in general tend to give higher grades to Access Tucson. The following graph is representative and illustrates.



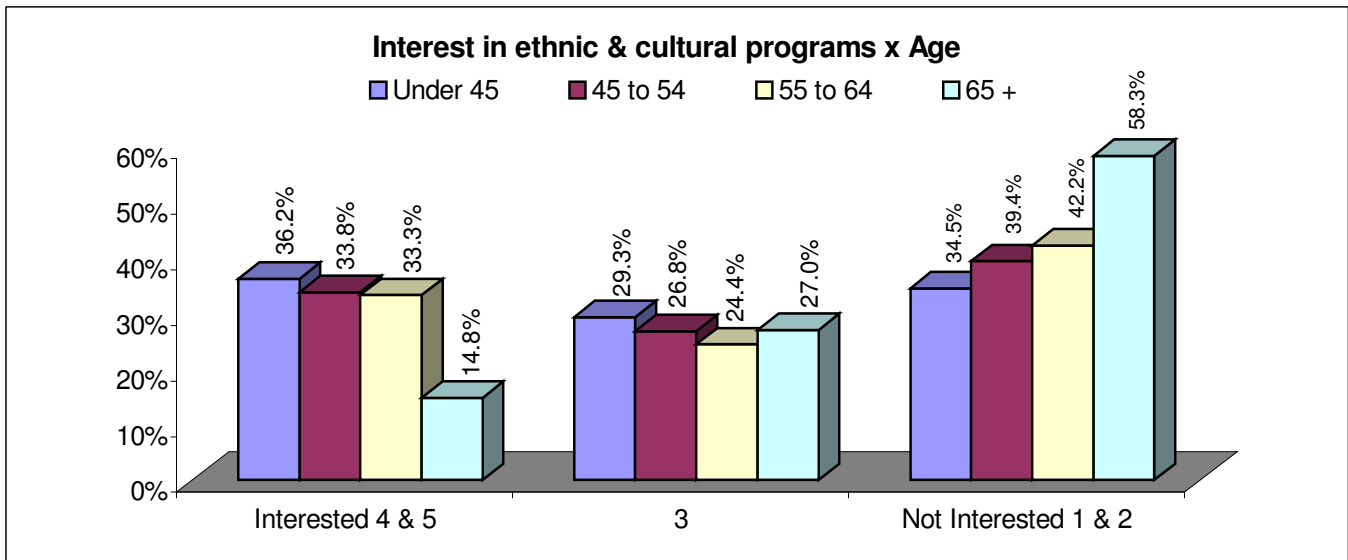
Also, respondents who report higher levels of household income are more likely to think it is important or very important to have cable channels that feature local community programming. The graph below illustrates.



When asked to indicate their level of interest in several different programming categories, respondents who report higher levels of household income, generally, show greater interest in most categories tested. The following graph illustrates.

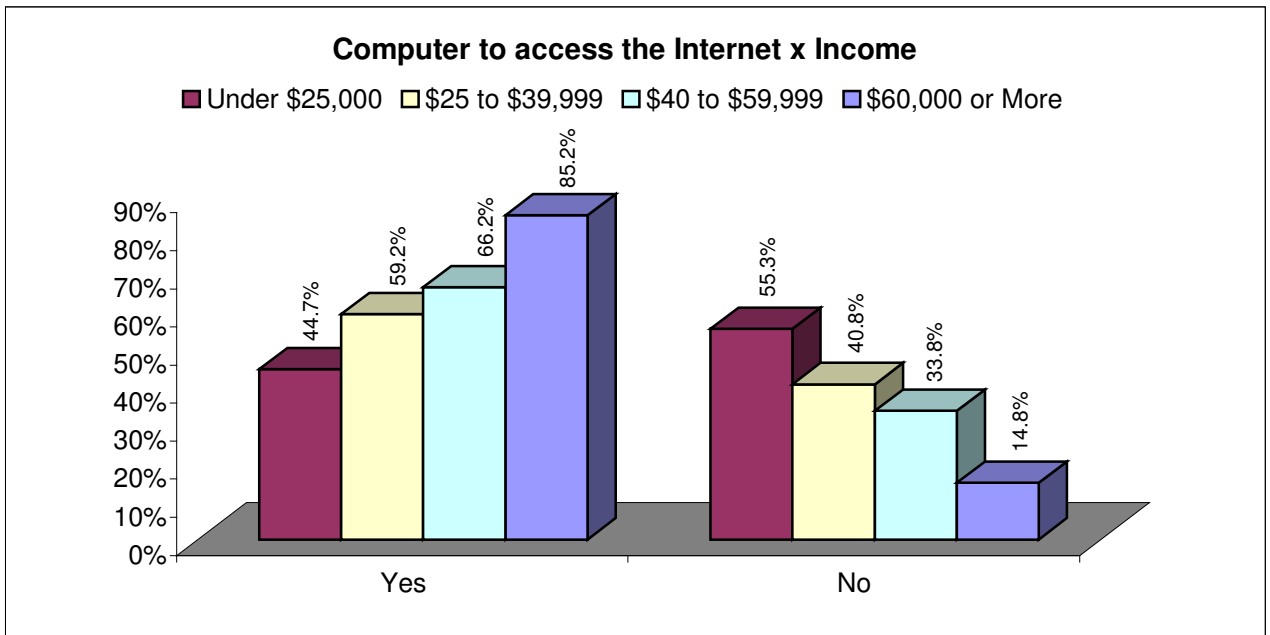
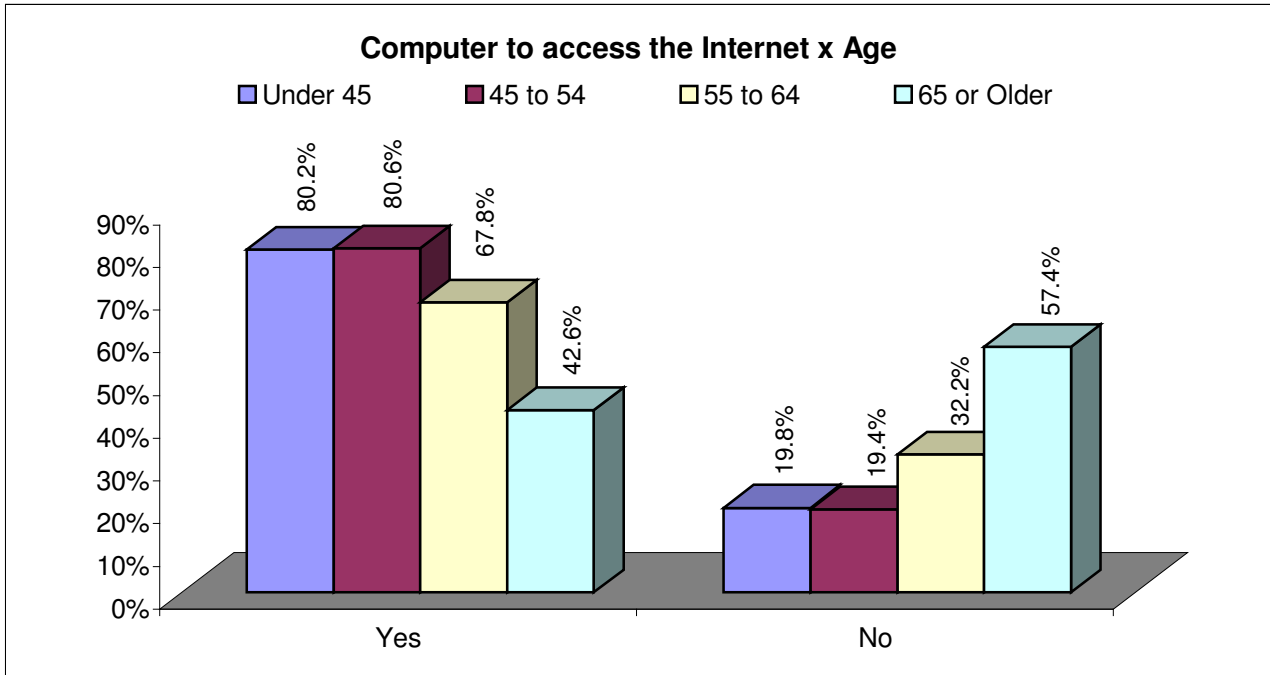


Conversely, older respondents, generally, show less interest in most programming categories tested. The following graph illustrates.



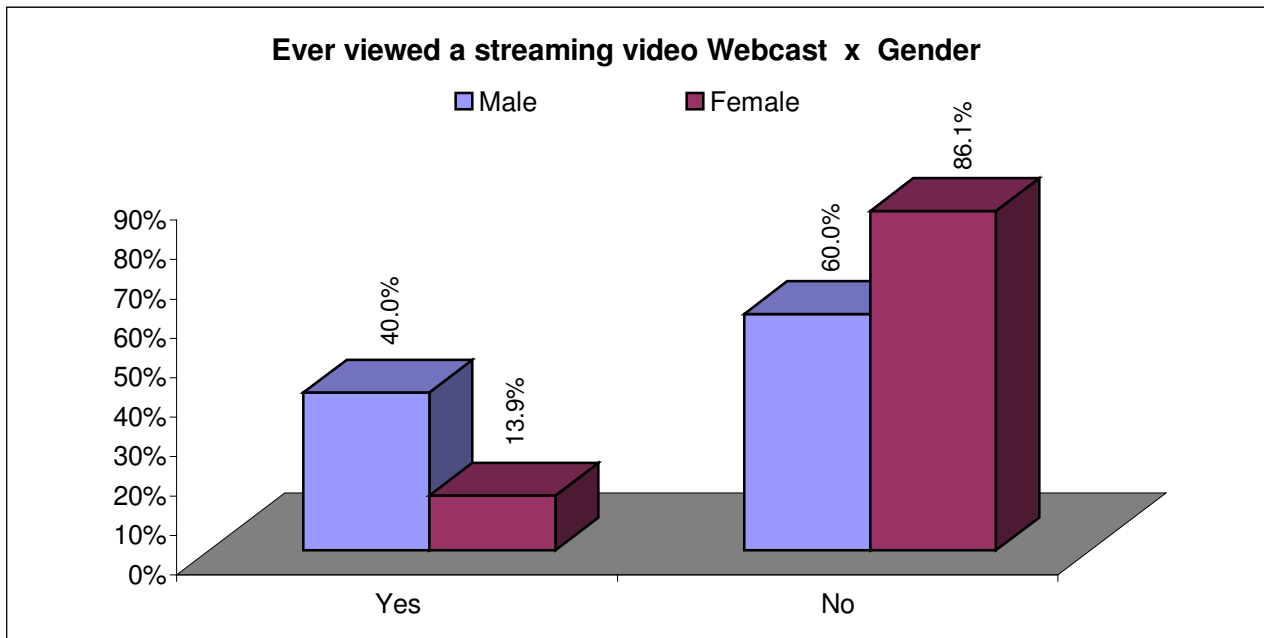
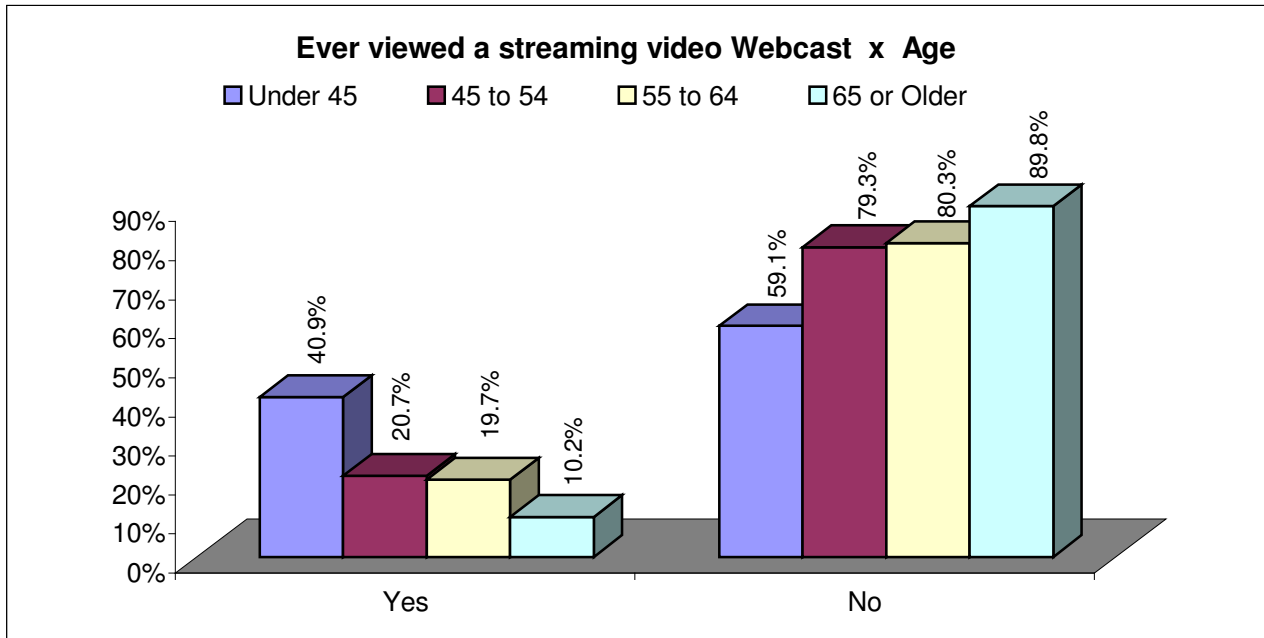
Access Tucson – Viewership Survey - 2005

Also, as shown below, respondents over the age of 65 and those reporting lower levels of income are significantly less likely to have access to a computer that is used to access the Internet.



Access Tucson – Viewership Survey - 2005

Finally, as shown below, older respondents who access the Internet and women who access the Internet are both significantly less likely to have ever viewed a streaming video webcast.



A complete unabridged listing of frequencies for all questions, including demographics, can be found under Tab 3. Cross Tabulation tables can be found under Tab 4.