

GUNNISON COUNTY METROPOLITAN RECREATION DISTRICT

Viewership Survey - 2016

DECEMBER 5, 2016



Gunnison County Metropolitan Recreation District
710 South 9th Street
P. O. Box 1369
Gunnison, CO 81230
970-642-8725
admin@gcmetrec.com

Executive Summary

The Gunnison County Metropolitan Recreation District has provided Television Translator service to the majority of Gunnison County and a part of Saguache County since 1978 when the District was formed. The cost of providing this service is essentially 100% of the General Operating Revenue of the District for the Fiscal Year 2017 (\$306,590). The Board of Directors of the District has periodically desired to determine the viewership of the service. Since the most recent survey was conducted in 2005, the current Board decided to conduct a survey during 2016. The survey was conducted via an interactive internet survey and a telephone survey. The survey was open for response for early August thru the middle of October. To advertise the survey, the District uses a series of newspaper ads, radio interviews, PSAs on the District information channel as well as mailing an Every Door Direct Mail (EDDM) flyer.

The results were 444 unique households answered the survey (389 current users, 40 users wanting to use the service and 15 non-users). The results of the provided information including:

- 389 current households using the system
- 835 individuals within the 389 current user households
- The average time the system is viewed per day – 50% of households answered 1-3 hours
- Satisfaction with channel lineup – 93% Somewhat Satisfied or better
- Satisfaction with interaction with District – 91% Somewhat Satisfied or better
- Preferences on use of District funds for Recreation and Arts

The results of this survey also provided a valuable list of contact information of the District's viewers that will be used in future communications about changes to service, expected outages and obtaining further information about the Television Translator system.

The District Board of Director's thanks those users that participated in the survey and will use your information in operating the District and planning for the future.

Contents

Executive Summary	1
Introduction	3
Survey Methodology	3
Survey Design.....	3
Survey Communication	4
Survey Timeline.....	4
Survey Results - Demographics	5
Total Number of Response and Method of Collection	5
Households by Location	6
Total Viewers.....	7
Hours Watched per Day.....	8
Survey Results – Viewer Satisfaction	9
Channel Lineup.....	9
Viewer Satisfaction – Interaction with District.....	11
Survey Questions about Recreation	12
Should District Funds be Used for Recreation.....	12
What should be the Recreation Uses for District Funds	12
Responses to Other	13
Previous Survey and other Surveys of Over-the-Air Television Viewership	14
Previous Survey	14
Industry Survey on Over the Air Television (OTA)	15
Deloitte Global -Technology, Media & Telecommunications Predictions 2016.....	15
Ooyala – State of the Broadcast Industry 2016	15
Consumer Electronics Association – Various Years	15
National Association of Broadcaster – GfK study	16
Summary of External Surveys.....	16
Maps of Survey Respondents	18
Full Service Area	18
Greater Gunnison Area	19
Gunnison Area	20
Almont Area	21
Roaring Judy-Jack’s Cabin Area.....	22
Greater Crested Butte Area	23
Crested Butte South	24
Riverbend-Riverland-Club at Crested Butte	25
Crested Butte.....	26
Mt Crested Butte	27
Parlin-Ohio City-Pitkin Area	28
Pitkin.....	29
Sargents.....	30
Addendum – Comments from Survey	31
Comments to Channel Line Up Satisfaction:	31
Comments to Contacting MetRec Satisfaction:	31
Project ideas for MetRec involvement.....	31

Introduction

In the Spring of 2016, the Board of Directors of the Gunnison County Metropolitan Recreation District decided to conduct a Viewership Survey to better understand the demographics, satisfaction and desires of the viewers of the District's Television Translator System. The Viewership Survey was conducted during the summer of 2016 when the District's population (full-time residents, part-time residents and visitors) was at its yearly maximum. In addition to answers to questions about the Television Translator Service, the Board wished to obtain information about viewer location and contact information to generate a viewer database for future communication.

Survey Methodology

Survey Design

The Survey was conducted via an interactive survey tool on a new website that was created just for this survey (<http://gcmrd.org>). In addition to the online survey, the public could respond by telephone. The telephone surveys were conducted by a telephone answering service via a dedicated local telephone number. The information collected by the telephone survey was entered in to a parallel, identical database to the online survey by the telephone answering service personnel. Use of a common database design enabled data merging and analysis after the completion of the survey.

The survey collected responses to the following questions:

- Name, Mailing Address, Telephone Number, Email Address of Household?
- Physical Address (if different from mailing address)?
- Demographics of Household (# of adults, # of Young Children, # of Children, # of Teens)?
- Translator Site Used (if known)?
- Satisfaction with channel lineup?
- Had the household ever contacted MetRec?
- Satisfaction with contact and service experience?
- Number of hours watched per day?
- Opinion about MetRec being involved in recreational activities other than television?
- What type of other activities and project ideas should the District consider?

Survey Communication

The aim of the communication phase of the Viewership Survey was to make every household with the Service Area of the District aware of the Survey, the importance of taking the Survey and how to take the Survey. Multiple means of communications were used to inform the public and invite participation. Methods included:

- Two consecutive weeks of print advertising (Gunnison Country Times, Crested Butte News, Gunnison Shopper)
- News segment coverage on KBUT
- Postcard mailer to every residential address in the Service Area (using USPS Every Door Direct Mail service)
- Information on the GCMRD website
- Information on the GCMRD on-screen channel guide
- Follow up article in the Gunnison Country Times

Survey Timeline

The communication phase was conducted in the middle of July with Every Door Direct Mail (EDDM) flyer being sent out the last week of July after the second week of print media ads. The online and telephone survey tool was available coincident with the start of the communications campaign. The first survey was received on July 29 with surveys being collected until the completion of the survey on October 26, 2016.

Survey Results - Demographics

After the completion of the Viewership Survey data collection period on October 26, 2016, the data sets for online and telephone responses were analyzed and reported below.

Total Number of Response and Method of Collection

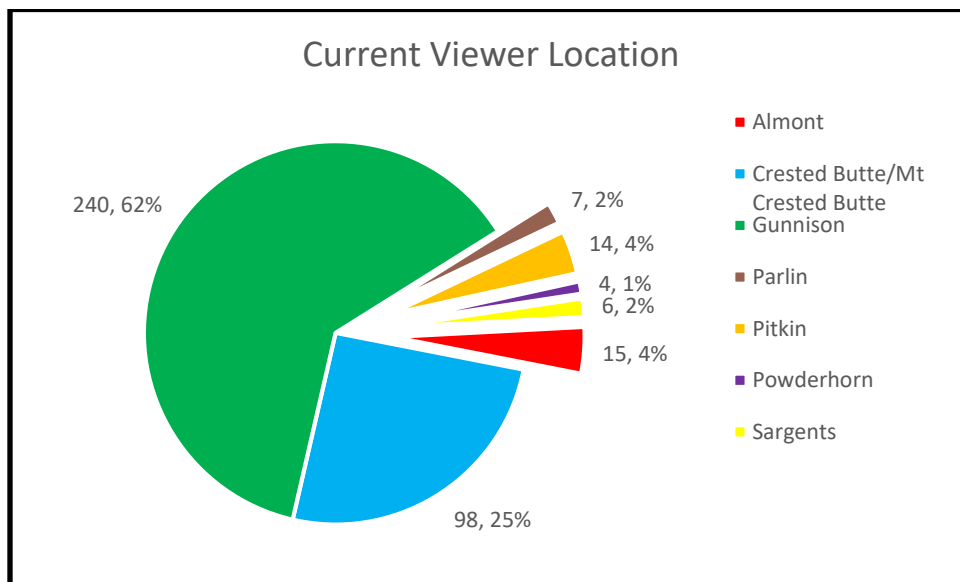
During the collection period, the District received a total of 482 responses (391 online and 91 telephone responses). The responses were divided into three types 1.) current users of the translator system, 2.) non-users wanting to use the translator system and 3.) non-users that only answered the questions about MetRec recreational priorities other than television. The total responses were then reviewed to remove any duplicates by the same household. Duplicates took the form of either the survey was filled out twice by the same person or by two people filling out independent surveys for the same address. Duplicates were identified and removed from the results. The following table shows the basic breakdown of survey responses:

	Combined	Online	Telephone
Total Responses	482	391	91
Duplicates Removed	38	32	6
Current Households	389	307	82
Potential New Households	40	38	2
Non-Viewers	15	14	1

Households by Location

The following table shows the location of current viewers by mailing address:

	# of Households	% of Households
Gunnison	240	62%
CB/Mt CB/CB South	98	25%
Almont	15	4%
Pitkin	14	4%
Parlin	7	2%
Sargents	6	2%
Powderhorn	4	1%



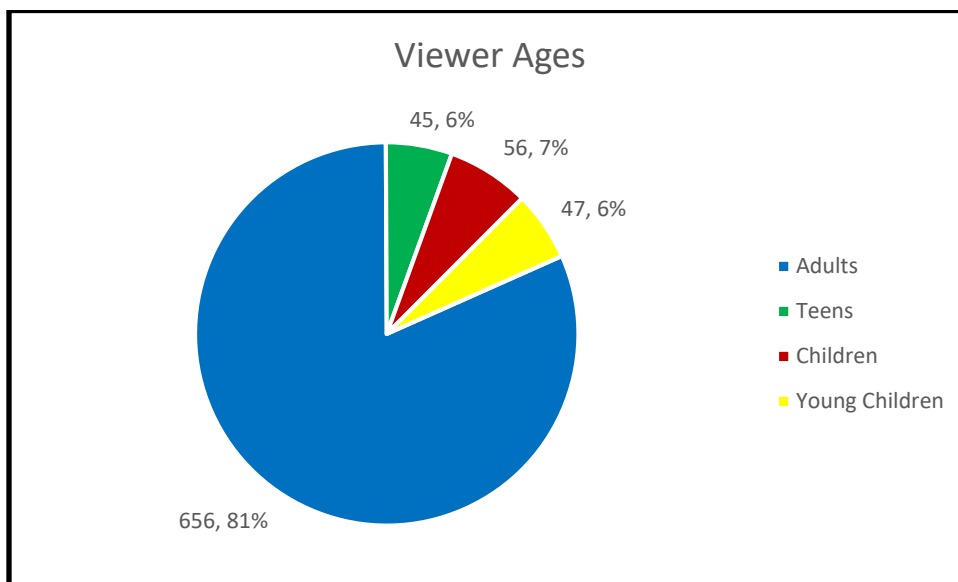
(Note: 5 addresses were removed as they were out of service area)

It should be noted that 91% of households using the Television Translator system live in the Gunnison to Mt Crested Butte corridor

Total Viewers

As noted above, the current number of households using the system at the time of the survey was 389. The survey asked for the breakdown of the households by number of viewers and the ages of viewers, as shown below:

	# of Viewers	% of Viewers
Adults (18 years and older)	656	81%
Teens (13-17 years)	45	6%
Children (6-12 years)	56	7%
Young Children (0-5 years)	47	6%
Total		



Compare the % of Viewers by age to the 2015 update to Gunnison County Census data:

Persons under 5 years of age – 4.6%

Persons between 5-17 years of age – 12.9%

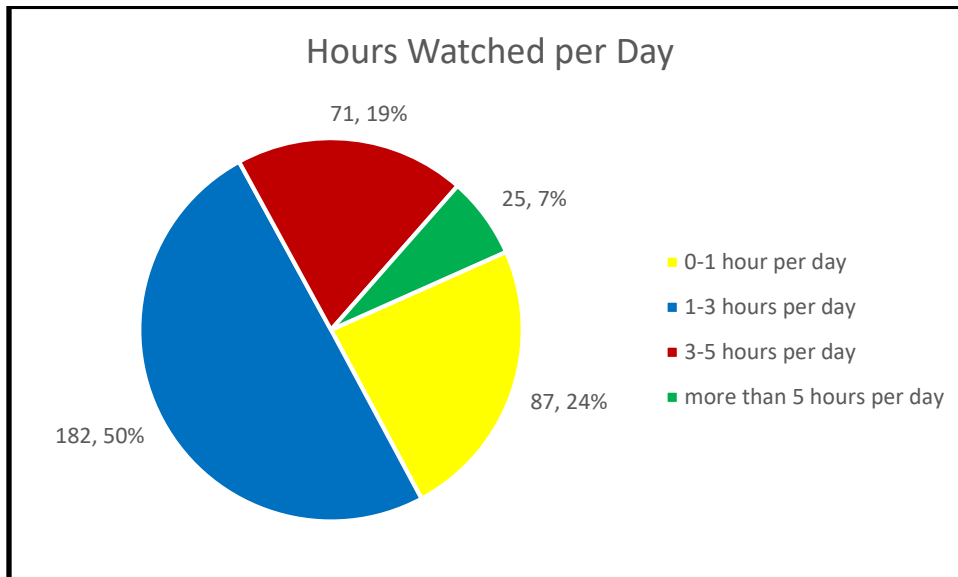
Persons 18 years of age and older – 82.5%

Accordingly, it would appear that the viewer profile generally matches that of the general county population.

Hours Watched per Day

Here is the breakdown of the amount of time per day that the Television Translator system is watch by households.

	# of Households	% of Households
0-1 hours per day	87	24%
1-3 hours per day	182	50%
3-5 hours per day	71	19%
5 or more hours per day	25	7%

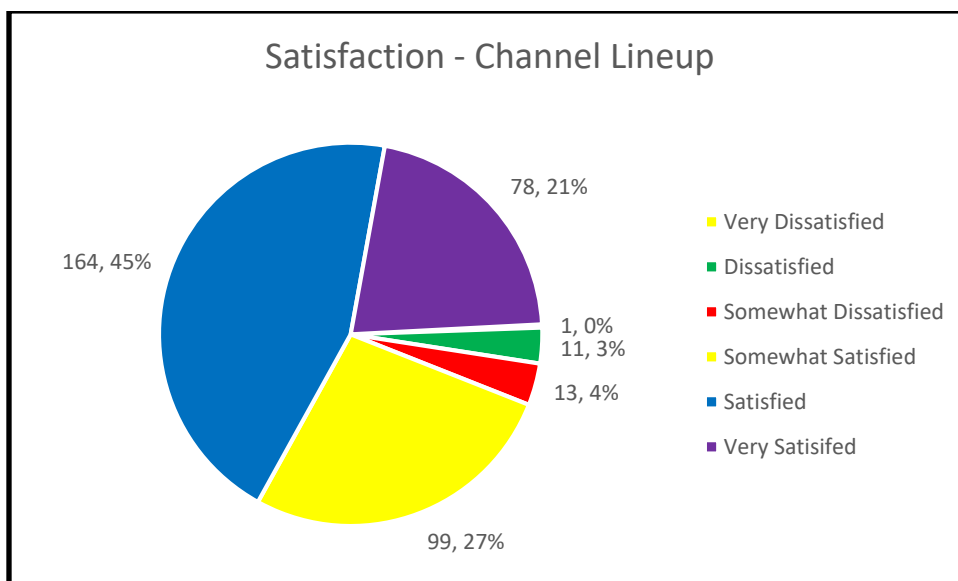


Survey Results – Viewer Satisfaction

Channel Lineup

The Survey asked for viewer satisfaction for the existing channel lineup. Note, that the channel lineup available to viewers whose signal from W Mountain in Gunnison (Gunnison, Almont, Comstock, Parlin, North Valley, Sapinero, Crested Butte South, and Sunlight Ridge (Mt Crested Butte) versus those viewers whose signal originates from Monarch Mountain (Sargents, Gateview, Waunita, Powderhorn and Pitkin). Viewers were asked to rate the channel lineup as Very Dissatisfied, Dissatisfied, Somewhat Dissatisfied, Somewhat Satisfied, Satisfied, and Very Satisfied.

	# of Households	% of Households	
Very Satisfied	78	21%	93%
Satisfied	164	45%	
Somewhat Satisfied	99	27%	
Somewhat Dissatisfied	13	4%	7 %
Dissatisfied	11	3%	
Very Dissatisfied	1	0.27%	



In addition to the ranking, the Survey asked the viewer to give additional feedback about the channel lineup.

Three major topics were prevalent – Number of Channels, Lack of HD signals and service problems or outages.

22 responses were related to signal quality or outages. MetRec staff have contacted many of these viewers and reported that most do not have external antennas. Because of the low power levels allowed for the translators, the use of an external antenna is highly recommended to assure signal levels that will provide consistent service.

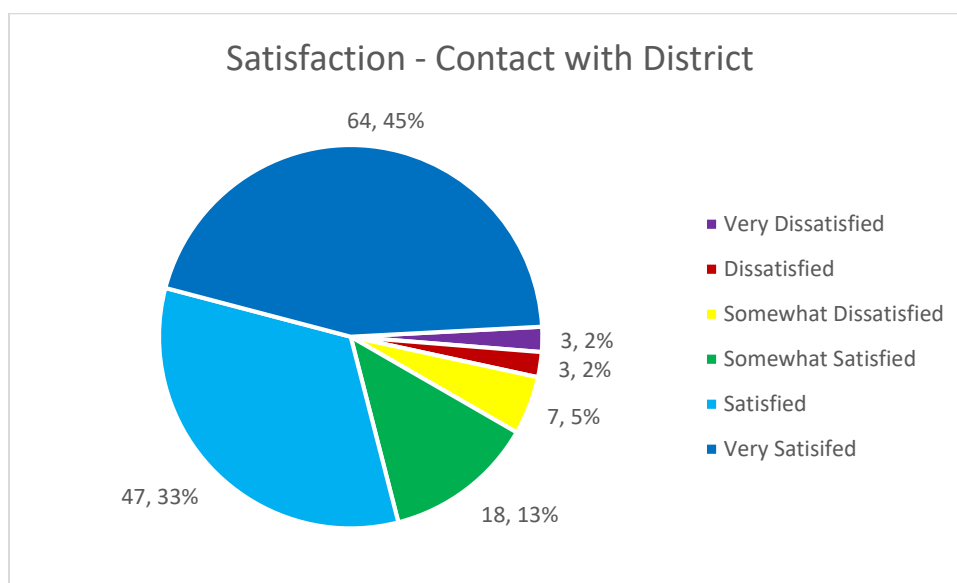
16 responses related to the number of channels available or requesting specific channels to be added. Many of the requested additions were for premium channels (CNN, ESPN, FOX News, Hallmark, etc.). The District currently only provides one premium channel, Discovery, and cannot afford the carriage costs of adding additional premium channels.

Three responses requested more HD channels. The District currently provides a maximum of 4 Standard Definition (SD) channels per translator. To provide High Definition (HD) channels, the District would have to reduce the number of channels per translator to 2 or 3.

Viewer Satisfaction – Interaction with District

The Survey asked about the satisfaction viewers had in contacting the District concerning any issues that the viewers might have. A total of 142 viewers answered that they had contacted the District. The results are as follows:

	# of Households	% of Households	
Very Satisfied	64	45%	91%
Satisfied	47	33%	
Somewhat Satisfied	18	13%	
Somewhat Dissatisfied	7	5%	9 %
Dissatisfied	3	2%	
Very Dissatisfied	3	2%	



Many of the written responses to this question were to state support for the Television translator system and the desire to keep it in place.

Survey Questions about Recreation

It should be noted that communications with the public indicated that the survey was for viewership of the Television Translator system and not a general survey of District goals or purpose. Therefore, the results of the survey are overwhelmingly from present viewing households with an interest in funds going to continuing TV service. Results cannot be extrapolated to the feelings of the total population of the District.

Should District Funds be Used for Recreation

The Survey asked viewers if District Funds should be used for Recreational purposes. The responses were as follows:

	# of Respondents	% of Respondents
Yes	153	43%
No	200	57%

It should be noted that the Survey responders were overwhelmingly viewers of the Television Translator system and were more likely to be concerned with continuing the service.

What should be the Recreation Uses for District Funds

If the viewer responded Yes to the question about use of District funds for recreation, the viewer was then asked to give preference as to type of use. The three choices were:

- Grants to Govt./Organizations for Recreation
- Grants to Govt./Organizations for Arts
- Develop and/or Operate Recreational Facilities
- Other

Viewers could choose one, two, three or four choices. There was a total of 140 people that answers this questions. The results are as follows:

	# of Respondents	% of Respondents
Grants for Recreation	96	69%
Grant for Arts	52	37%
Develop/Operate Recreational Facilities	72	51%
Other	20	14%

Responses to Other

The major items that were listed as Other things that respondents would like to see happen with District funds were:

- Recreation Center (CB South – Mt Crested Butte)
- Hiking and Biking Trails
- Improvement to existing facilities
- Internet Infrastructure
- Public Golf Course

This list captures ideas that had multiple responses. There were also many ideas that were outside the scope of the District and not listed here. All response are listed in the Addendum.

Previous Survey and other Surveys of Over-the-Air Television Viewership

Although this Survey received responses for 389 current viewers and 40 potential new viewers, this is not the total number of households that may be using the Television Translator system. To get a better feel for the total number of households, this report looks at the results of a previous Viewer Survey, conducted in 2005, plus several industry surveys conducted in the past five years

Previous Survey

In 2005, the Gunnison County Metropolitan Recreation District conducted a survey of viewers and the results are presented here. The previous survey was conducted via return mailer and asked for viewers and where they lived. The results of that survey were reported by translator site and by full-time and part-time residents. The responses for W Mountain (Gunnison) were reported as a range. Since this was a mail survey, it is not understood how there was a range. The numbers shown in the following table are the minimum values from the 2015 survey. Per the District Manager, the lower number was used in reporting viewers for carriage fee calculations.

	Full-Time Households	Part-Time Households	Total Households
Almont	5	11	16
Comstock	2	3	5
Crested Butte South	6	3	9
North Valley Subdivision	1		1
Parlin	4	3	7
Pitkin/Waunita/Ohio City	9	25	34
Powderhorn	0	3	3
Sapinero	0	2	2
Sargents	4	4	8
Spring Creek	0	1	1
Steuben Creek	5	1	6
Sunlight Ridge (CB/MT CB)	17	16	33
W Mountain (Gunnison)	192	127	319
Unknown Sites	0	16	16
Total	245	215	460

Industry Survey on Over the Air Television (OTA)

In conducting an internet based search of Over the Air (OTA) television viewership survey. Five surveys were found that appear to have relevance to the GCMRD survey.

Deloitte Global -Technology, Media & Telecommunications Predictions 2016

A portion of the Deloitte Global report on the state of Technology, Media and Telecommunications for 2016 included a section on Pay-TV versus Over the Air television. The report shows Over the Air-only homes being steady at 11 million from 2010-2013, increasing 11.5 million in 2014 and 12.5 million in 2015.

	OTA households	U. S. Households	%
2010	11 million	112.5 million	9.8%
2011	11 million	118.7 million	9.3%
2012	11 million	121.0 million	9.1%
2013	11 million	122.5 million	9.0%
2014	11.5 million	123.2 million	9.3%
2015	12.5 million	124.6 million	10.0%

Ooyala – State of the Broadcast Industry 2016

This report states that there are 16 million homes without Pay TV services and 45% of those homes use Over the Air (OTA) television.

45% of 16 million is 7.2 million households. Using 2015 households of 124.6 million, this is a penetration rate of 5.8%

Consumer Electronics Association – Various Years

The Consumer Electronics Association has conducted periodic surveys of Over the Air (OTA) television. In 2010, the CEA survey reported 8% percent of TV households were OTA reliant. In 2013, the CEA Survey reported 7% of households rely solely on antennas for TV reception. In 2014, the CEA reported 6% of households relied on OTA television. Also reported in the press release on the CEA study, there was reference to a Nielsen report in 2012 which showed OTA television viewership a 9 percent.

National Association of Broadcaster – GfK study

The National Association of Broadcasters have reported the results of a series of survey conducted by GfK in their publication “Home Technology Monitor”. GfK results show the reliance on OTA television to have been 14% in 2010, 17.8% in 2012, and 19.3% in 2013, 17% in 2016.

Summary of External Surveys

Taking the totality of these surveys, it is apparent that there is significant variation of results with a low of 5.8% (Ooyala - 2016) to 19.3% (NAB – GfK – Home Technology Monitor – 2016). Although we cannot come up with the actual percentage we can use the range of results to provide an estimation of actual viewership in the Gunnison Valley.

The total number of households in Gunnison County is 6,336, per the US Census Bureau 2010-2014. If we apply the percentage of OTA households (in national surveys) to the Gunnison Population, we will see the following:

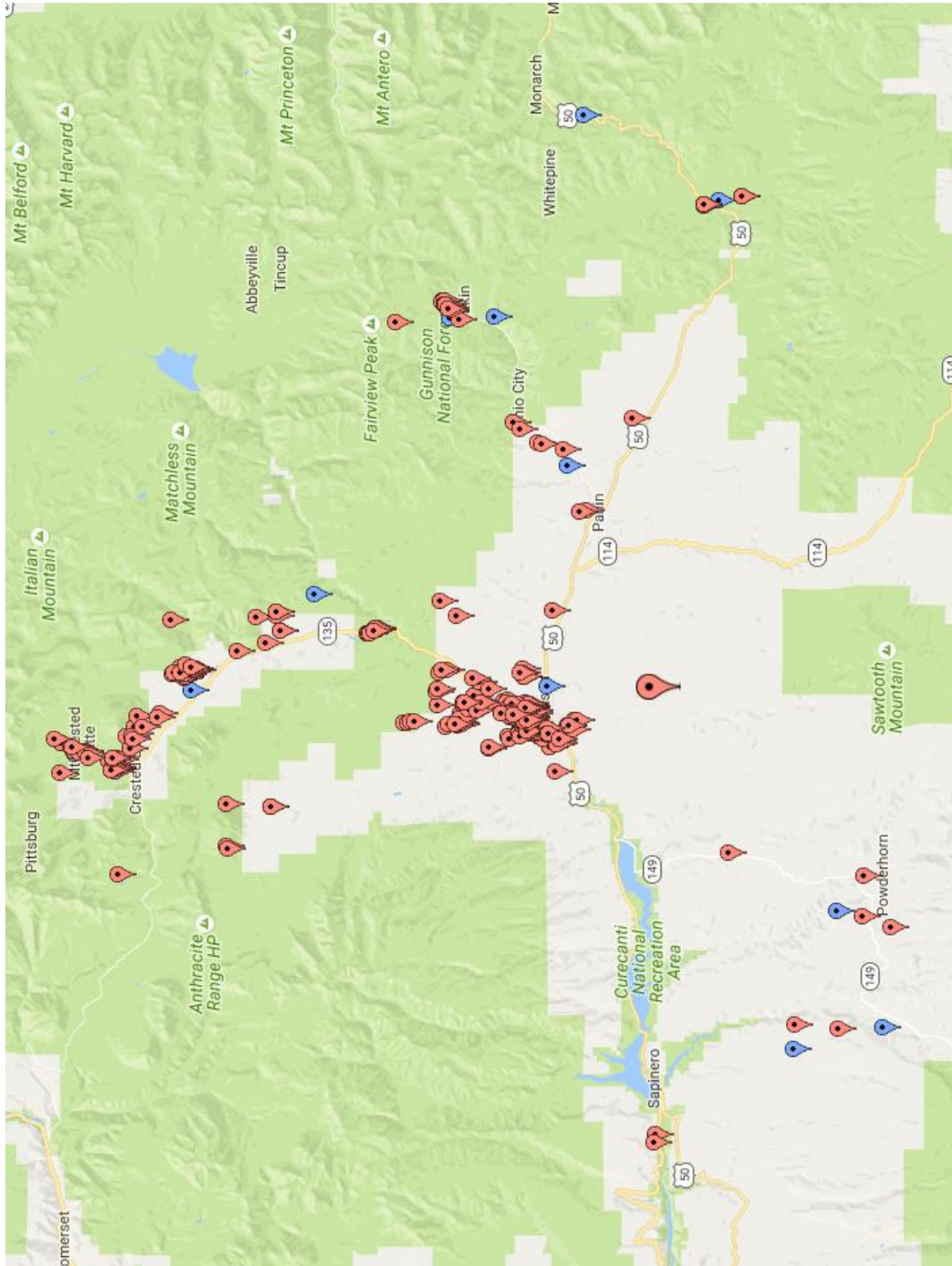
	% of Households (national surveys)	Estimated # of District Households
Deloitte Global 2010	9.8%	621
Deloitte Global 2011	9.3%	589
Deloitte Global 2012	9.1%	577
Deloitte Global 2013	9%	570
Deloitte Global 2014	9.3%	589
Deloitte Global 2015	10.0%	634
Ooyala – 2016	5.8%	367
Consumer Electronics Assoc. - 2010	8%	507
Consumer Electronics Assoc. - 2013	7%	444
Consumer Electronics Assoc. - 20134	6%	380
Nielsen - 2012	9%	570
NAB – GfK - 2010	14%	887
NAB – GfK - 2012	17.8%	1128
NAB – GfK - 2013	19.3%	1223
NAB – GfK - 2016	17%	1077
Estimated District Households -		
Minimum		367
Maximum		1223
Estimated District Households - Mean		678
Estimated District Households - Median		589

We can use the data from the above chart to make an estimate of total households. The most likely actual population should be at or very close to the Mean or the Median (the Mean and Median will be at the same value for a normal probability curve (bell curve)). In this analysis, we do not have complete data nor a complete understanding how the data was collected for the national surveys. We state that the District population of OTA households is probably within space between the Minimum and Maximum estimates and mostly likely near the Mean and/or Median or the sample. Therefore, the most likely population is between 589 and 678 or 9.3% and 10% of the total number of households within the District.

Maps of Survey Respondents

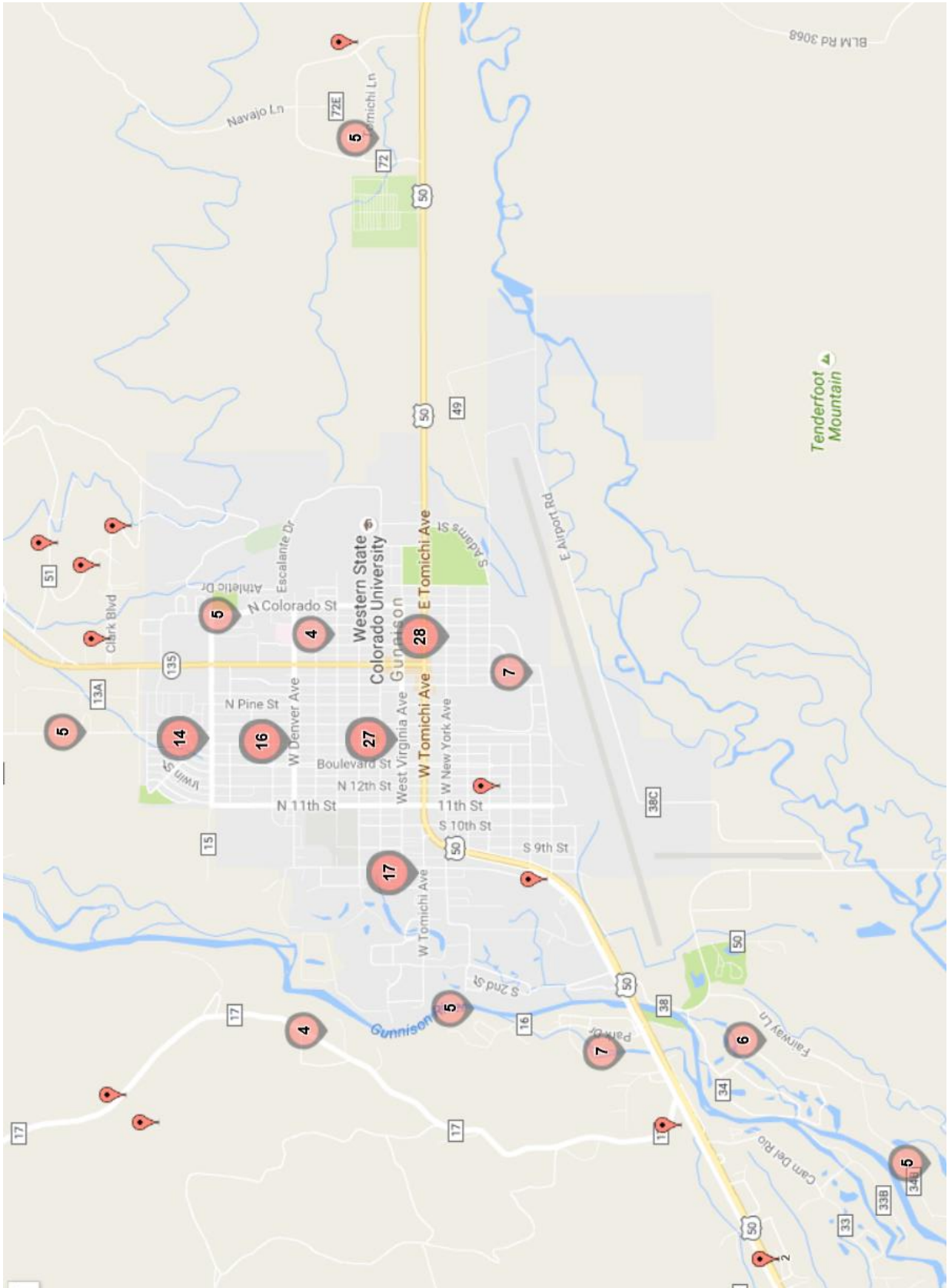
The following maps are representations of the locations of the respondents to the Viewership Survey. Location are shown as single households (in areas of low response) or as number of households within a single circular area (in areas of high response).

Full Service Area

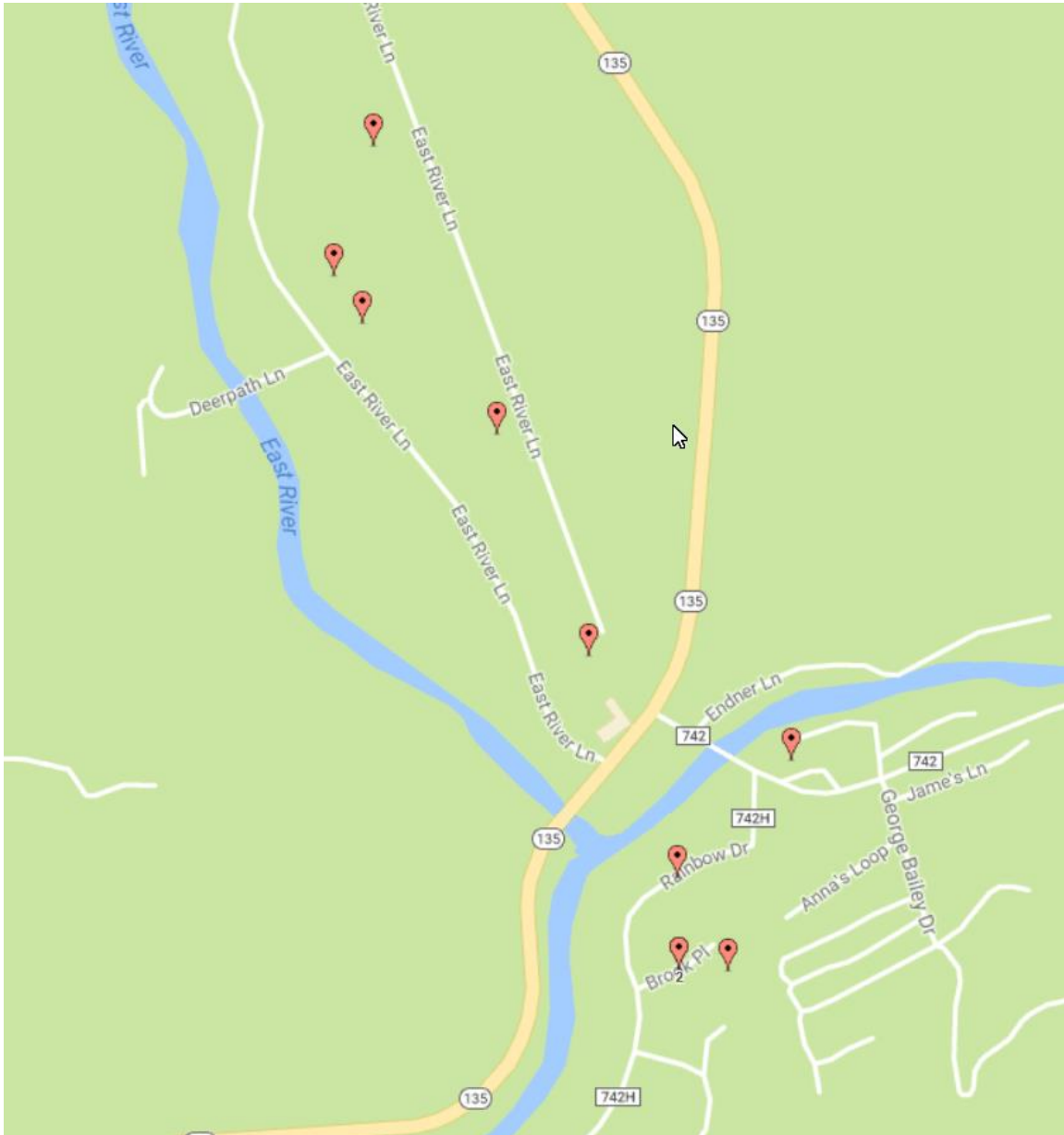


Note: Users are in Red, Tower Sites in Blue.

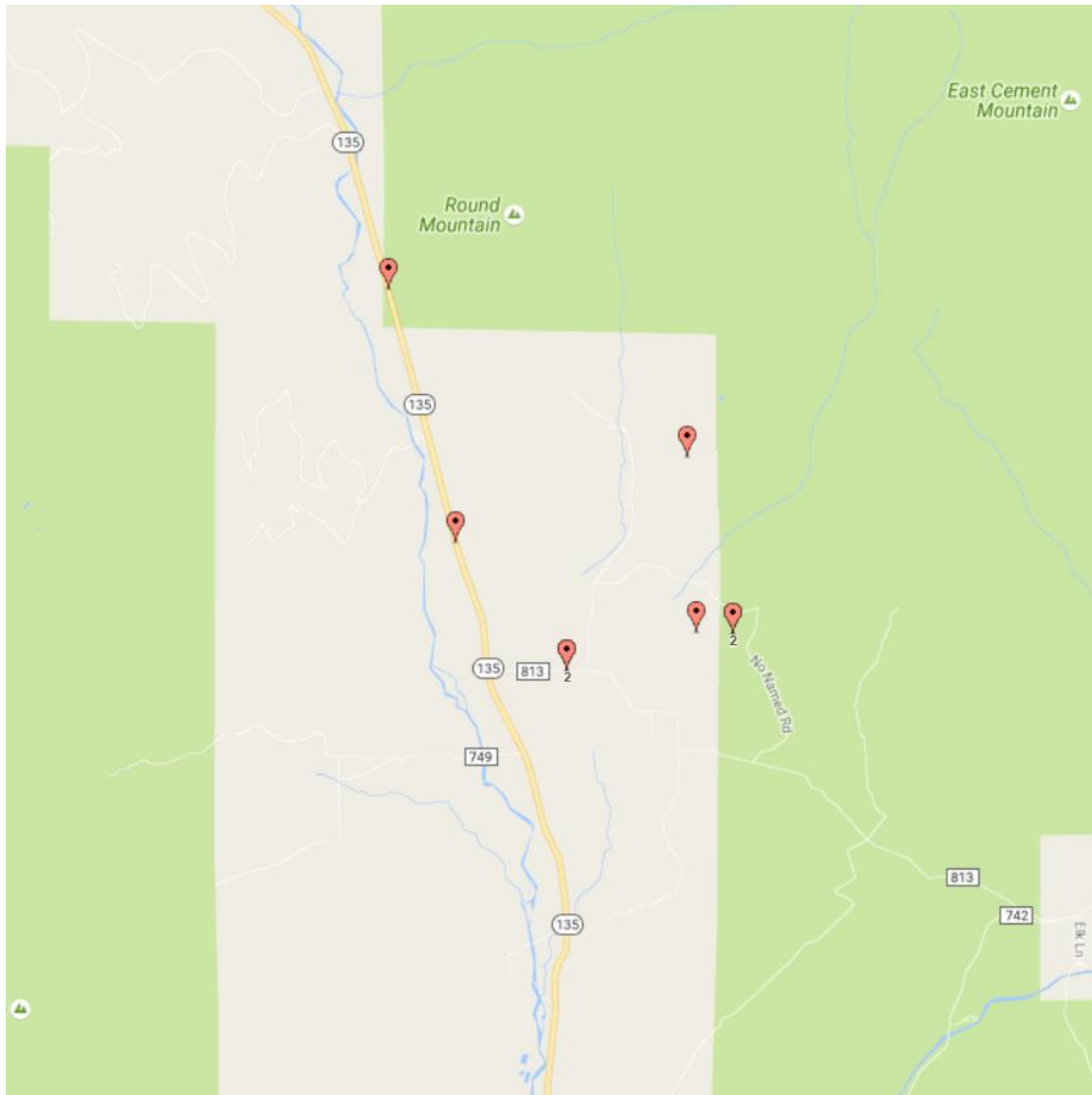
Gunnison Area



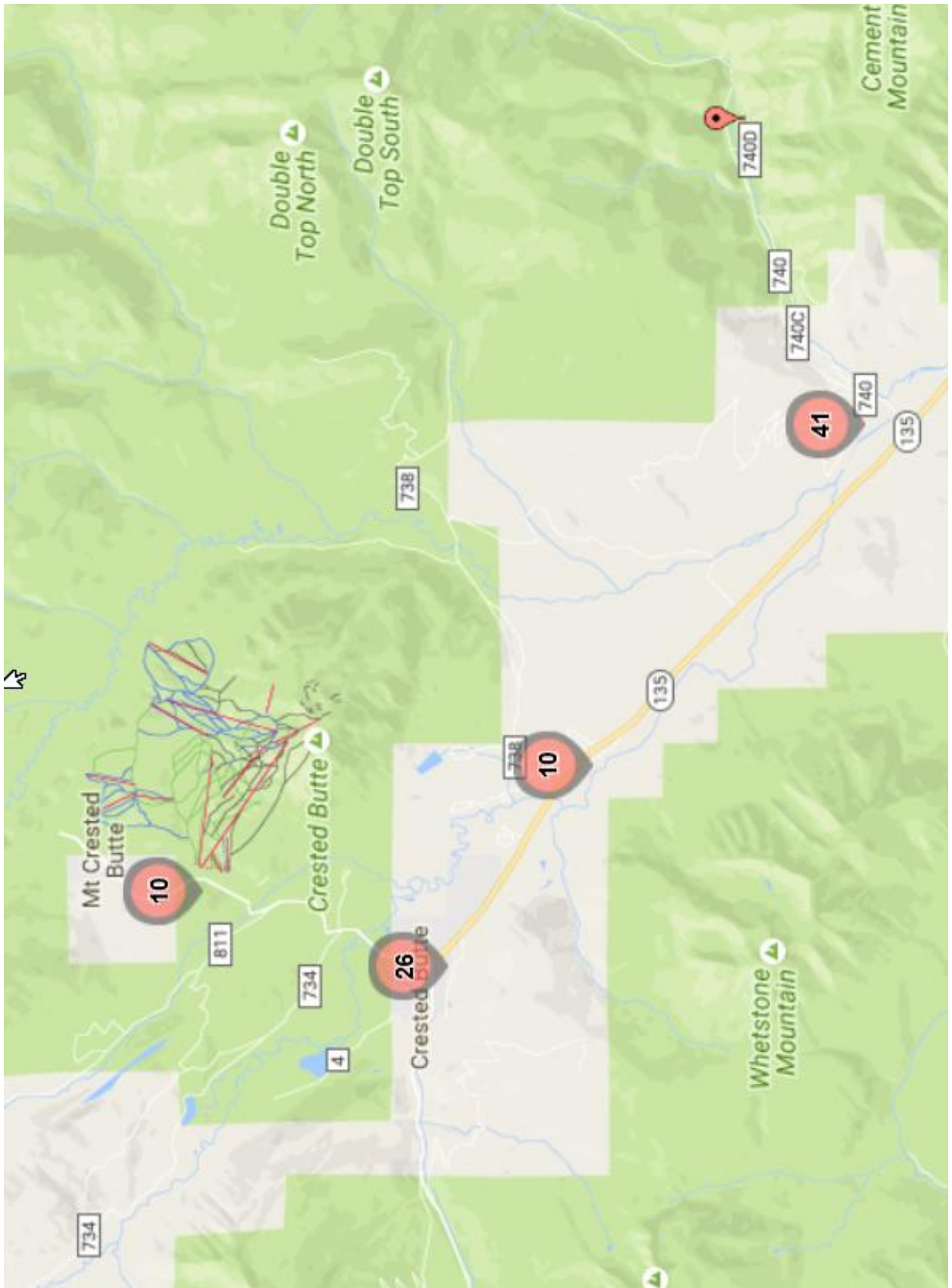
Almont Area



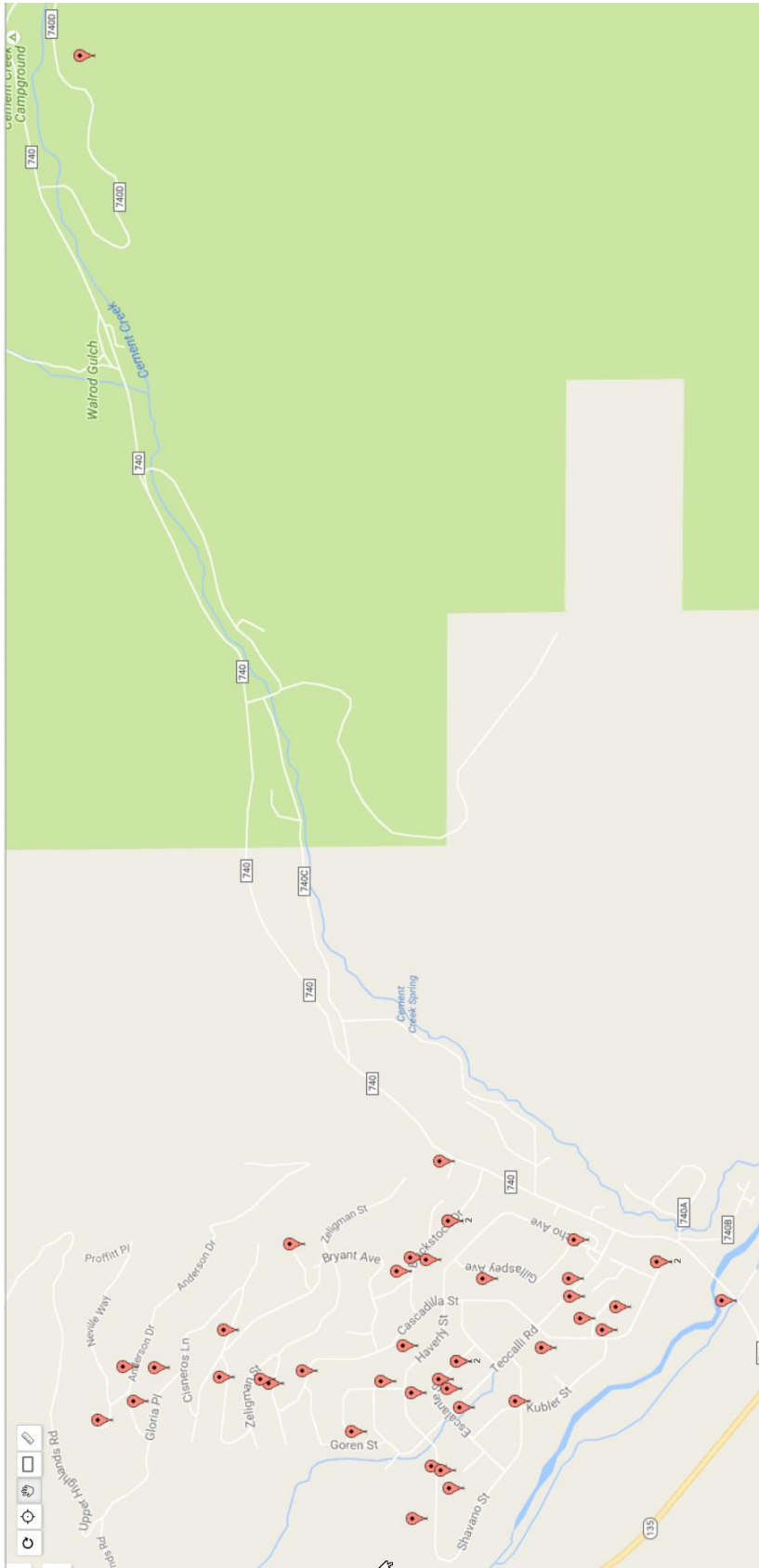
Roaring Judy-Jack's Cabin Area



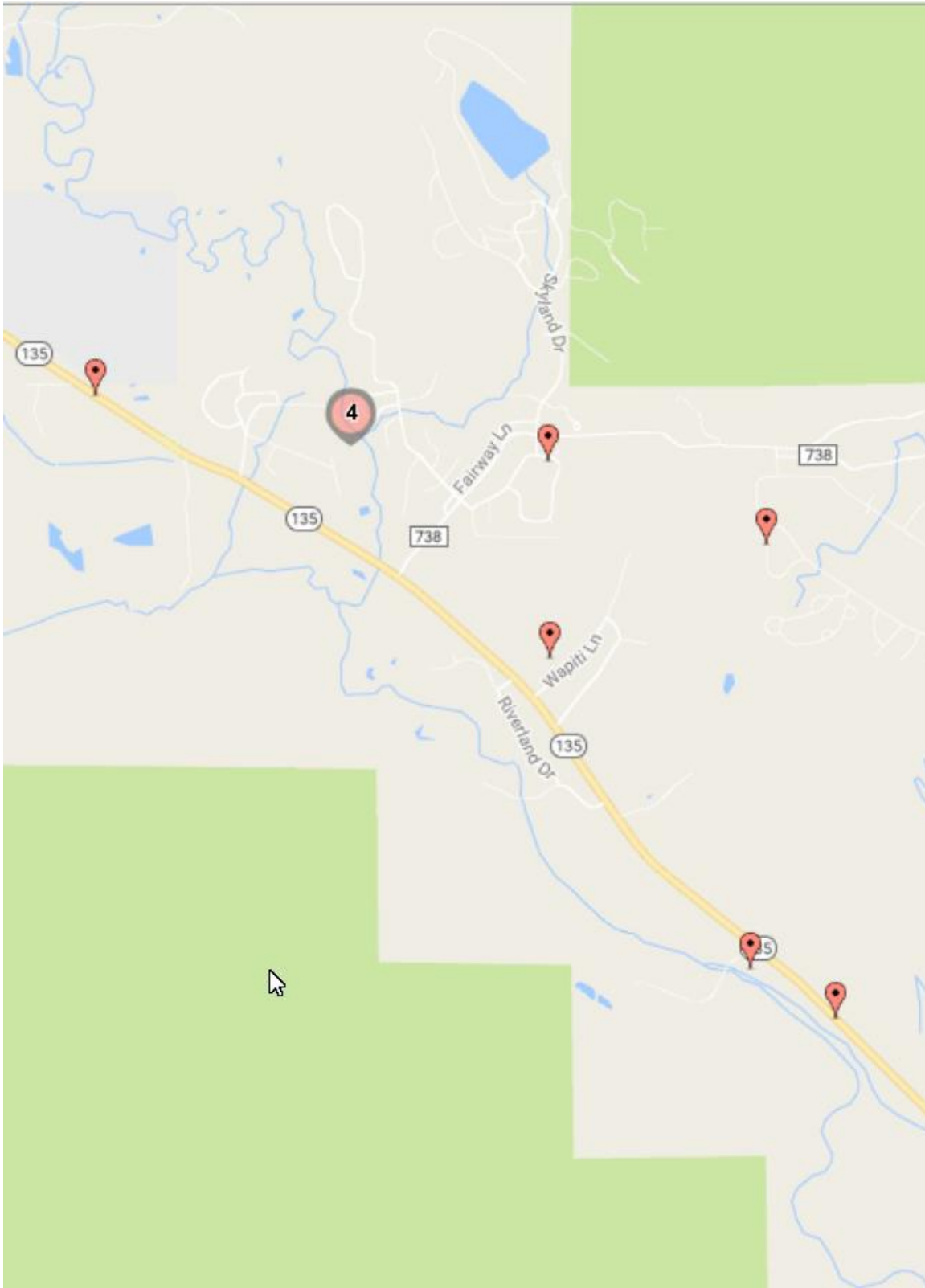
Greater Crested Butte Area



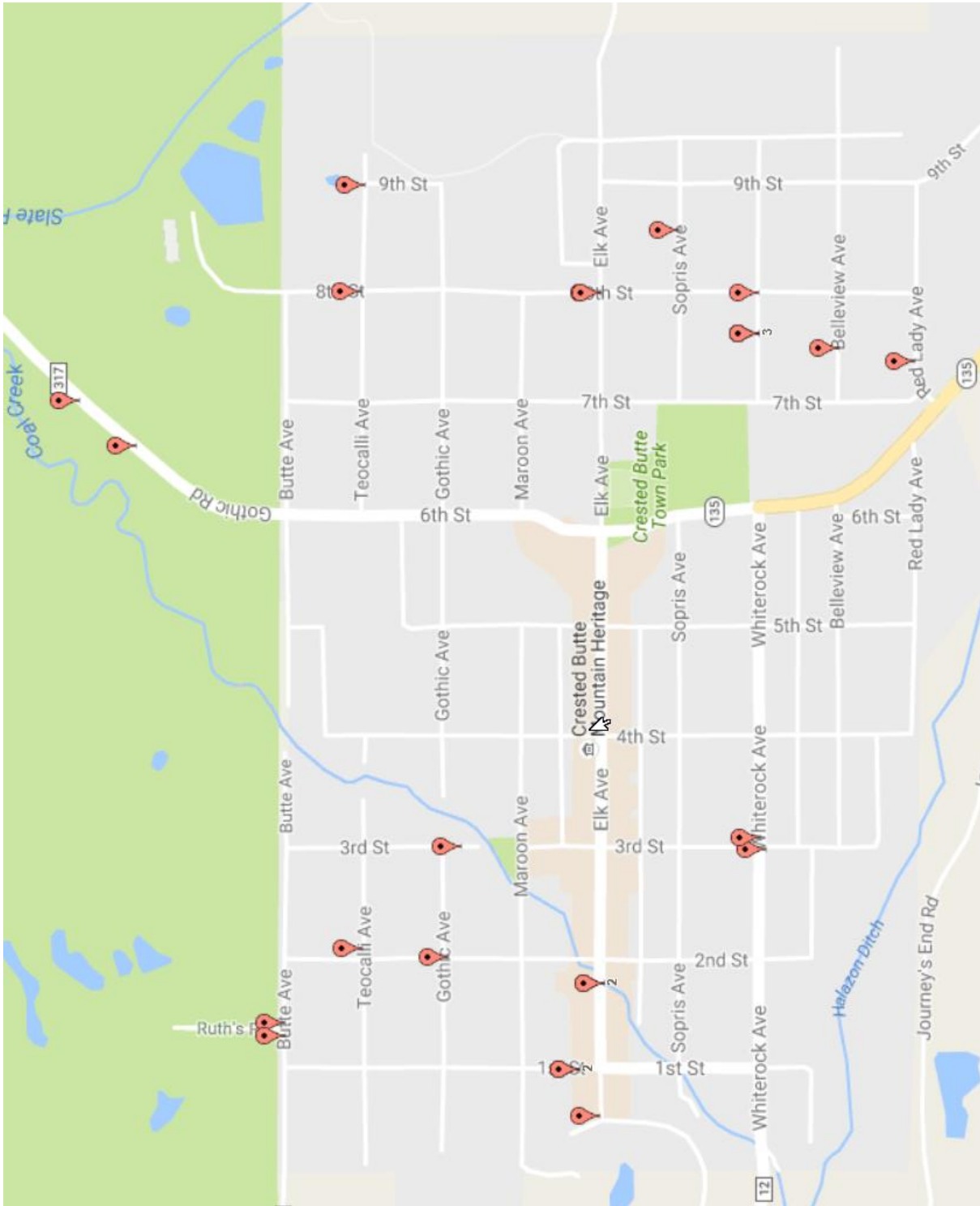
Crested Butte South



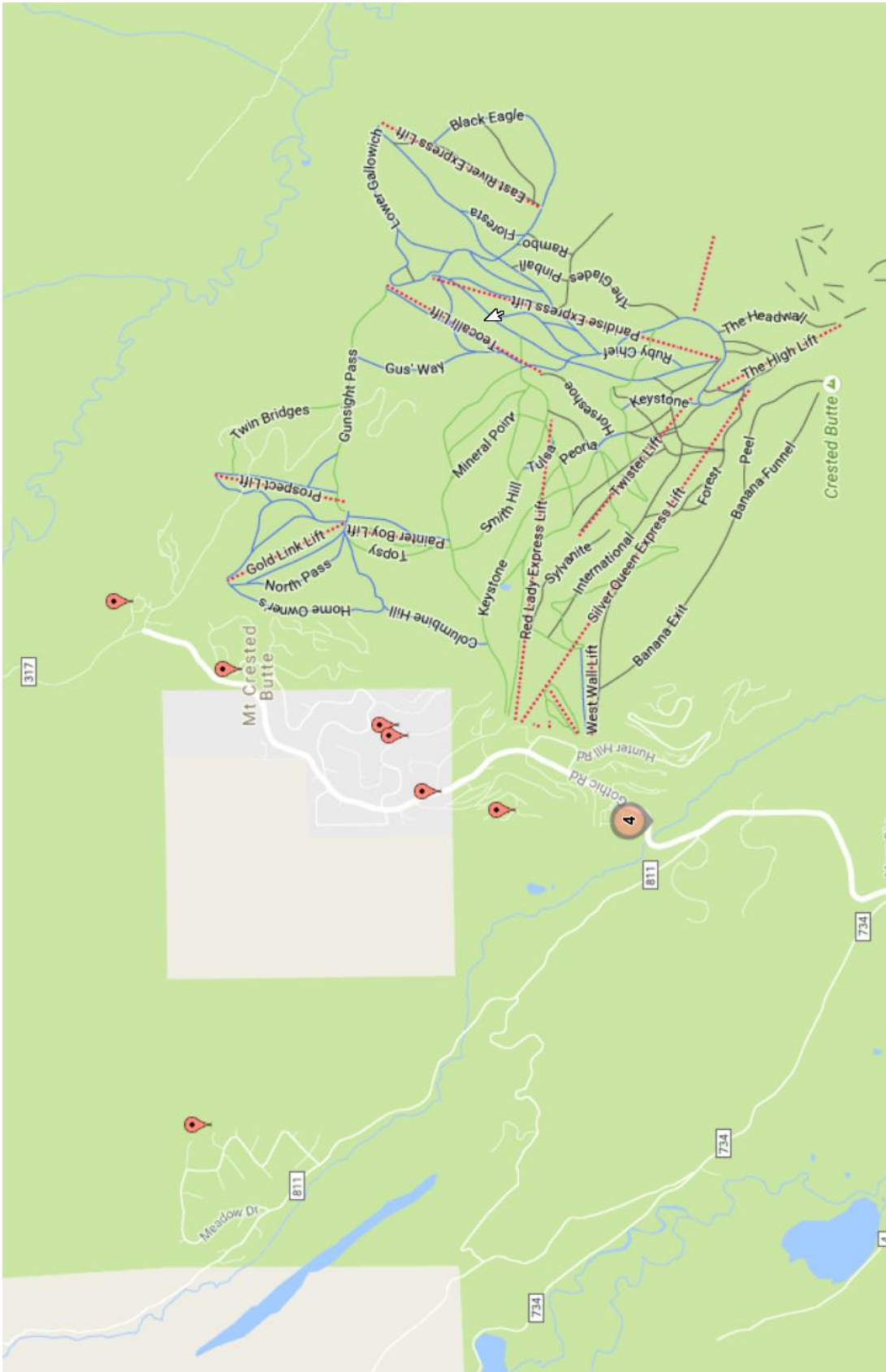
Riverbend-Riverland-Club at Crested Butte



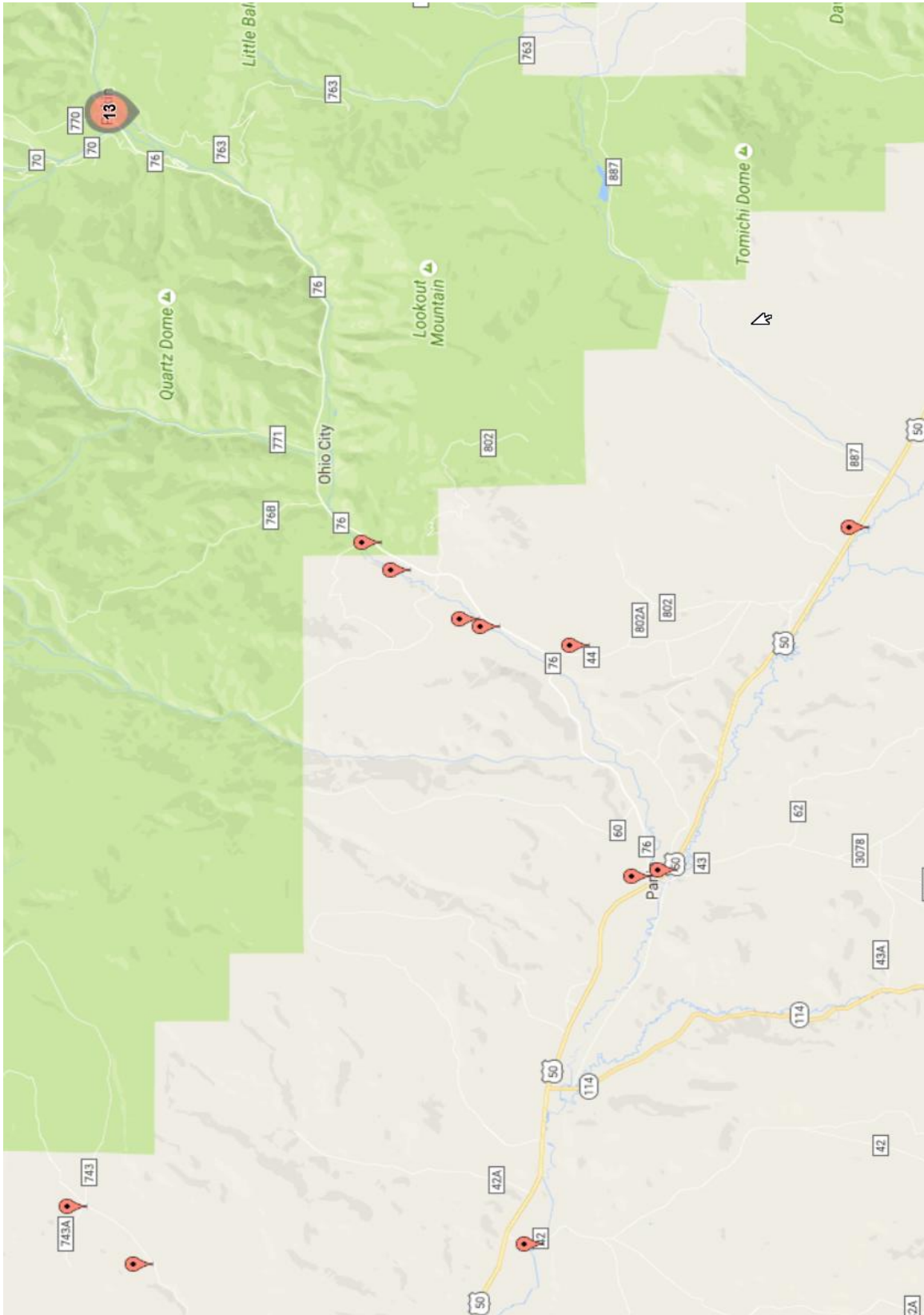
Crested Butte



Mt Crested Butte



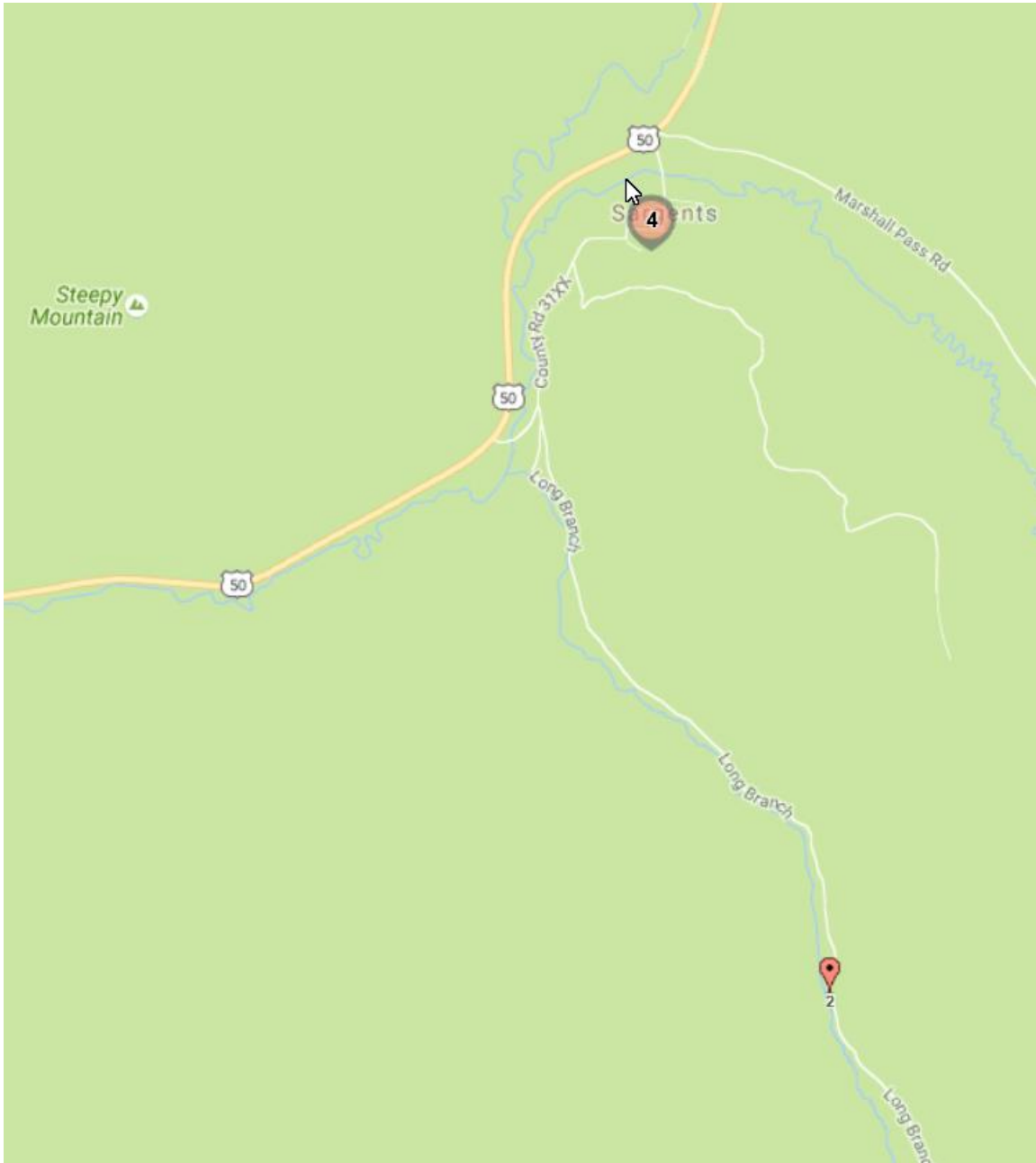
Parlin-Ohio City-Pitkin Area



Pitkin



Sargents



Addendum

The Addendum is a complete list of the user comments made to all questions on the survey.

Available separately from the District Office.

