

THE MERTON GROUP

MARKET RESEARCH REPORT¹

Prepared For

BELMONT MUNICIPAL LIGHT DEPARTMENT



MAY 2003

DRAFT

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1. INTRODUCTION

In this Report, The Merton Group (“Merton”) presents the results of the market research study performed as part of the Feasibility Study conducted for the Belmont Municipal Light Department (“Belmont Light”). This market research was focused on determining the feasibility of providing Municipal Broadband Network (MBN) services to the Town of Belmont, MA (the “Town”), with such infrastructure potentially financed by municipal bonds. The MBN services are 100 Mbps data access and potentially enhanced video services using fiber to the home (FTTH). The primary focus of the market research effort was to ascertain if the Town has the fundamental base of Internet users to convert and if this base of users would convert to the new service. A secondary objective was to ascertain what the interest and acceptance would be for new services such as digital video.

The main goal for this market research was simply:

“To establish the viability for conversion from an existing Internet service provider to an MBN interconnection in a wide enough user base to ensure bond coverage.”

The study has several key objectives. They are as follows:

1. Ascertain the current use of Internet and cable/satellite TV by key demographic metrics like age; from this analysis to determine if there are certain demographic factors in the Town which are more favorable to conversion to the MBN
2. Ascertain current Internet Service Providers’ penetration
3. Ascertain conversion rates to MBN for existing Internet and cable/satellite TV users by key demographic metrics
4. Ascertain price points for MBN acceptance; these must reflect the range of offerings from simple dial up replacement to fully enhanced 100 Mbps Internet along with enhanced video, telephony, server hosting and whatever else may be of interest
5. Ascertain satisfaction of current cell phone users to the quality of coverage in the Town

This Report summarizes the statistics collected from a residential mail-in survey commissioned and conducted by Belmont Light in April 2003.

2. METHODOLOGY

As part of the initial preparatory discussions for the market research effort, Merton suggested the following possible methodologies to Belmont Light for conducting the survey associated with the study:

1. *Intercept Interview*
A study conducted in person with respondents who are approached or intercepted in high traffic locations such as grocery stores or shopping malls.
2. *Mall Intercepts*
Interviews conducted in shopping malls by randomly selecting people from among those present to be screened. The main part of the interview can take place either on the mall floor or inside the offices of a data collection company located within the mall.
3. *Telephone Survey*
Respondents are interviewed via the telephone. The telephone interview is normally conducted from a central telephone facility.
4. *Mail-In Survey*
A standard survey questionnaire is mailed to a randomly selected portion of the total population of residences and/or businesses, or where reasonable, to the entire population of such parcels.

Of the recommended methods, Belmont Light chose to use the Mail-In Survey technique in conjunction with its regular mailing of electric bills. The final questionnaires were prepared in discussions with Belmont Light. Two different forms of questionnaires were developed to reflect different price points for conversion to the MBN. The final form of questionnaires is attached as *Exhibit A*.

In April 2003, Belmont Light mailed out the questionnaires with its electric bill to 2,000 randomly selected residences in the Town; 1,000 of the first form and 1,000 of the second were sent. The questionnaires were not sent to businesses because they did not comprise the target market for purposes of the current MBN study. The residences were asked to return the questionnaire with their electric bill.

As of May 1, 2003, Belmont Light had received [624] completed surveys, a return rate of [31]%, an extraordinarily high number in comparison to average return rates on mail-in surveys of about 5%-10%.

The accuracy of projections obtained, in other words, how representative the surveyed population is of the entire Town population, depends heavily on the number of survey responses obtained. If 175 to 200 responses were obtained, then it would be possible to make projections with a +/- 7.5% accuracy with 95% confidence. With about 400 responses, the accuracy of the survey increases to +/- 5%. In other words, with about 400 responses, a sample survey of current Belmont residents would differ no more than +/- 5% than if all Belmont residents were contacted and included in the survey. Further, if the survey were replicated, the statistics would fall within the margin for error 95 out of 100 times.

Merton processed and analyzed all [624] returned questionnaires to generate the results in this Report. This sample size, as explained above, yields accuracy in results of better than +/- 5%.

3. HIGHLIGHTS

3.1 *Internet Access Demographics*

1. About 80% of Belmont households have Internet access.
2. About 37% of Belmont homes use dial-up Internet access, 37% use DSL, 5% use cable modem and the rest satellite; penetration of “broadband” is relatively high at 42%.
3. About 20% of households use AoL for Internet access, 33% use Verizon, 7% use ATT/Comcast, 5% use MSN and the remaining 15% use other service providers like Earthlink, RCN and WorldNet.

3.2 *Cable TV Demographics*

1. About 64% of Belmont homes have cable TV, 5% have satellite TV service, about 2% have both and the remaining 29% have neither.

3.3 *Telephone and Cell Phone Demographics*

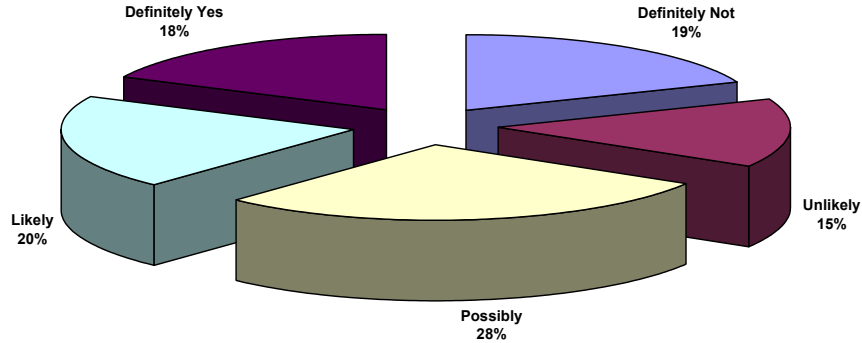
1. Approximately 11% of Town households do not have a land based telephone line, representing the segment of population in the town that likely uses only cell phones.
2. Over 25% of the households use more than 1 telephone line
3. Approximately 43% of respondents thought that their cell phone service was very spotty or spotty in the Town, indicating dissatisfaction with their cell phone coverage.

3.4 *Municipal Broadband Network Services*

1. **About 38% of households are likely or very likely to switch to the MBN for broadband Internet access at the price of \$40 per month.**

The chart below represents the potential size of MBN market for Internet access (at a price point of \$40 per month) in Belmont. The minimum size of the MBN Internet market can be expected to be 18% of households and the maximum size about 66%. Merton estimates the market size to be 38% of homes. The market for MBN Internet is quite significant and robust at the price point of \$40 per month.

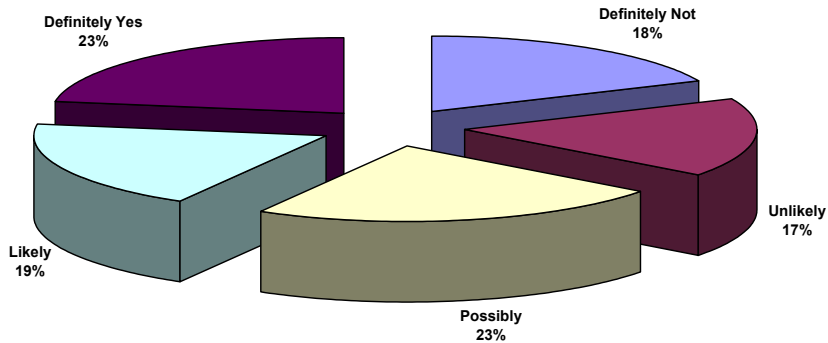
MBN Broadband Internet Access at \$40/month



2. Almost 42% of homes are likely or very likely to switch to the MBN for video services at the price of \$40 per month.

The minimum market size for MBN video services is 23% of households and the maximum is 65%. Merton estimates the market size to be 42%. The market for MBN video is stronger and more robust than for MBN Internet.

MBN Enhanced Video at \$40/month



3. Almost 45% of the households where the decision maker is less than 65 years old are likely or very likely to switch to the MBN for broadband Internet access at \$40 per month. This segment forms almost 71% of all households in Belmont.

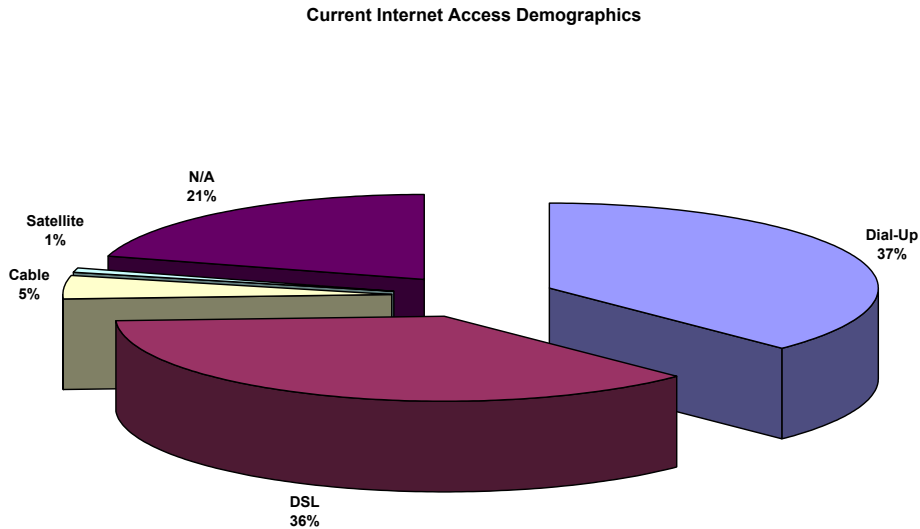
4. Only about 20% of the homes where the decision maker is over 65 years old are likely or very likely to switch to the MBN for broadband Internet access at \$40 per month. This segment forms less than 29% of all homes.
5. Almost 57% of current DSL users are likely or very likely to switch to the MBN for broadband Internet access at \$40 per month.
6. About 46% of homes where the decision maker is less than 65 years old are likely or very likely to switch to the MBN for enhanced video services at \$40 per month.
7. About 35% of homes where the decision maker is over the age of 65 are likely or very likely to switch to the MBN for enhanced video services at \$40 per month. Clearly, there is significantly strongly support for MBN video from the senior citizens than there is for MBN Internet.

4. DETAILED RESULTS

4.1 Internet Market Statistics

4.1.1 Internet Access Usage

The survey asked the respondents what kind of Internet access service they had at home. The choices provided were dialup, cable modem, DSL and satellite. The results are shown below.

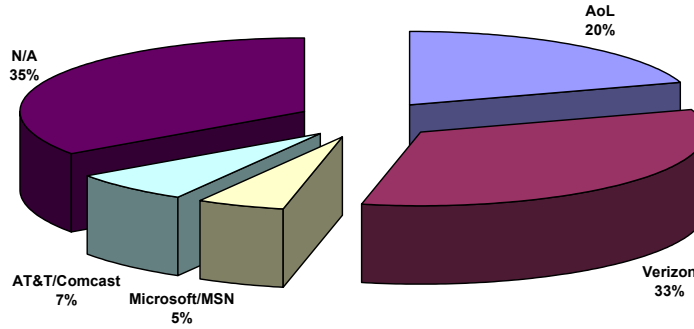


The results clearly show that there is a fairly high penetration of “broadband” data service in the town, about 42% comprising DSL, cable modem and satellite service.

4.1.2 Internet Service Providers

The respondents were then asked about who their ISP is; the choices provided were AoL, Verizon, AT&T / Comcast and MSN. The results are show below. The majority of Internet users have Verizon as their ISP, for DSL service. The other commonly used ISPs are AoL, ATT/Comcast, MSN, Earthlink and WorldNet.

Internet Access by ISP

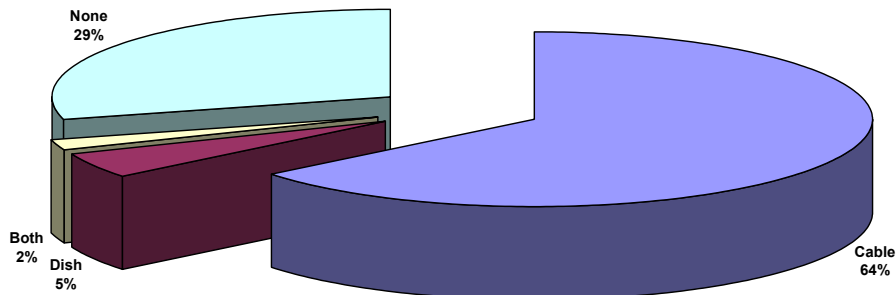


4.2 Cable TV Market Statistics

4.2.1 Cable / Satellite TV Usage

In order to understand the penetration of cable or similar services in the Town, the respondents were asked what kind of cable or satellite TV service they used at home. From the results, it is clear that 71% of Town residents use cable or satellite TV service, while some have both. The breakout is shown below.

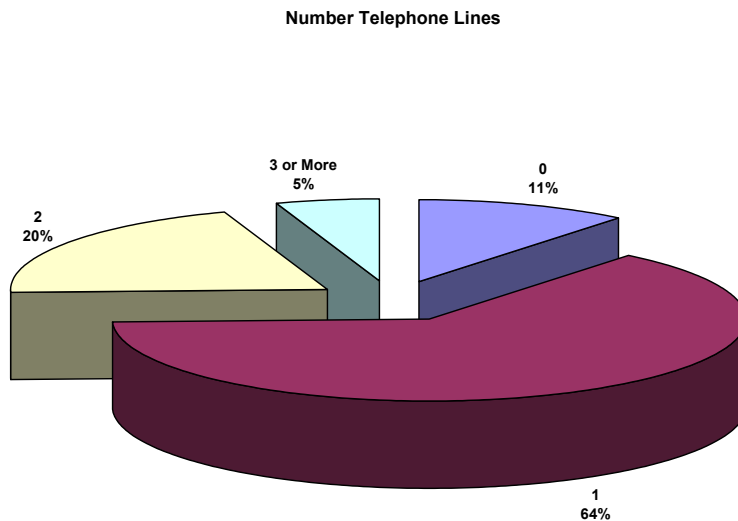
Current Cable/Dish TV Demographics



4.3 Telephone and Cell Phone Service Statistics

4.3.1 Land Line Telephone Service

The survey was also targeted at understanding the current telephone service demographics in the Town. More importantly, the segment of the population, which uses more than one telephone line, represents the initial target market for conversion to the MBN. This is because a household is probably paying about \$25 to their ISP and another \$25 for the second telephone line dedicated to data/fax. With the MBN, the second telephone line could be eliminated, and the end-user could be paying the same total of \$50 to an ISP for 10+ Mbps Internet access service. This segment of the population therefore represents the “low hanging fruit” for transfer to the MBN. The results are shown below; over 25% have more than one line.



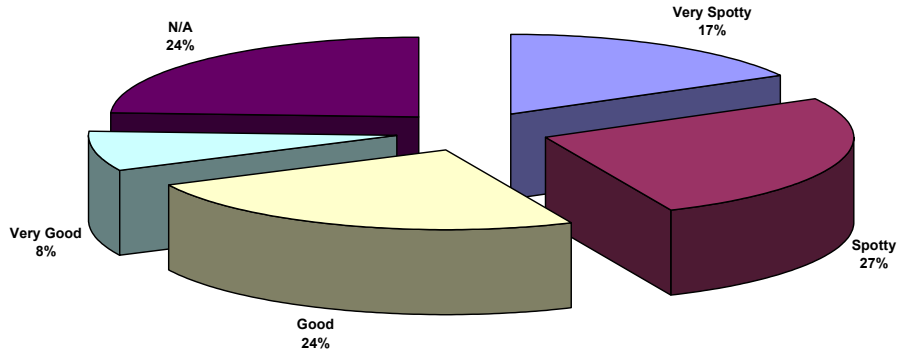
4.3.2 Cell Phone Service

In addition, it must be noted that 11% of the Town households do not have any land-based telephone line, indicating that such households likely use only a cell phone for communications.

The survey also asked the respondents to opine on the quality of coverage of their cell phone service, whether they thought it was very spotty, spotty, good or very good. First, the results shown in the table below indicates that 76% of households use cell phones. Second, 43% of the respondents were dissatisfied with the quality of their cell phone service coverage within the Town, measured by those who chose “Very Spotty” or “Spotty” as their response.

8. How would you rate the coverage of your cell phone service in Belmont?					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Spotty	103	10.3%	17.0%	17.0%
	Spotty	160	16.0%	26.4%	43.4%
	Good	148	14.8%	24.4%	67.8%
	Very Good	49	4.9%	8.1%	75.9%
	N/A	146	14.6%	24.1%	100.0%
	Total	606	60.7%	192.4%	
Missing	Errors	393	39.3%		
Grand Total		999	100.0%		

Cell Phone Coverage



4.4 MBN Internet Access

As alluded to before, this market study is primarily targeted at measuring the adoption of new services enabled by the MBN, including 100 Mbps data service and enhanced digital cable services. This information is cross-tabbed with key demographic factors to understand which segments of the market will be the potential user base, and what the price sensitivity is of that potential user base.

The survey was targeted at determining the “take rate” or rate of adoption to MBN services at two different price points (\$40 per month, \$60 per month) for two different services (100 Mbps Internet access, enhanced digital video services). The questions were asked in two different forms of the questionnaire as alluded to before in order to eliminate any psychological biases in having two price points in the same questionnaire; respondents might be biased to be inclined to the lower price point and strongly disinclined to the higher price point if both appeared on the same questionnaire. The above adoption rates were then segmented by key demographic metrics, including age and current type of Internet/cable connection.

4.4.1 MBN Internet Adoption Rates

The respondents were asked the question how likely they would switch to an Internet access service that would be dramatically faster than what they currently have today, at the two different price points above. The results are shown below for the price point of \$40. The percentages in the Valid Percent column

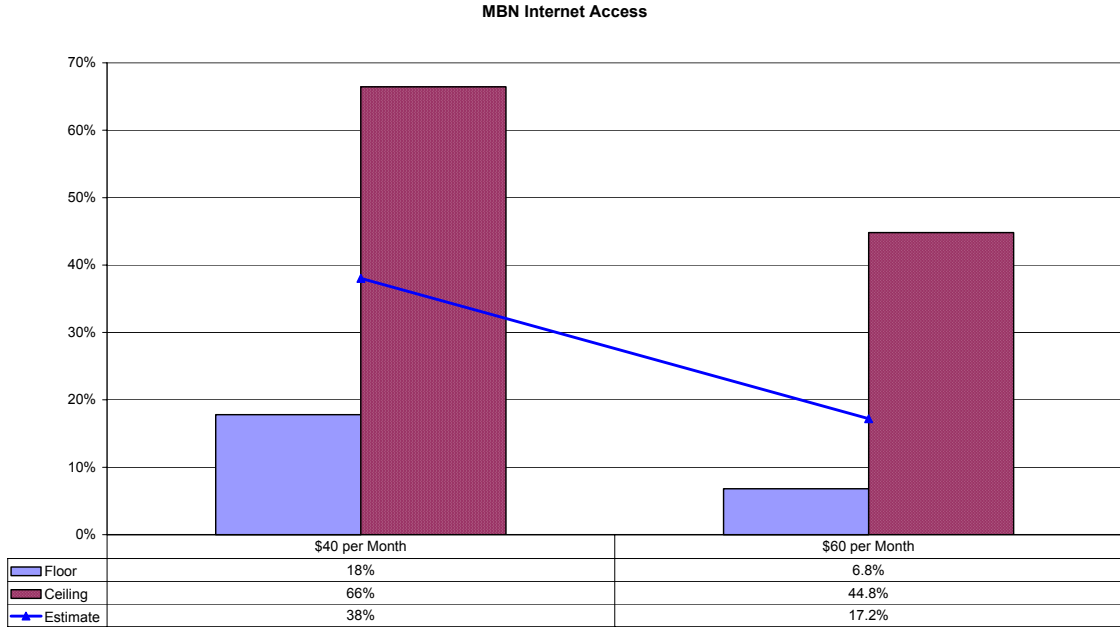
indicate the proportion of households responding with the respective affirmative or negative reaction. The results are quite favorable, with 38% likely or very likely to switch.

6. Would you switch to a 10 Mbps Internet service (at least 100 times faster than your current connection), if it were \$40 per month for unlimited usage?					
		<i>Frequency</i>	<i>Percent</i>	<i>Valid Percent</i>	<i>Cumulative Percent</i>
<i>Valid</i>	<i>Definitely Not</i>	55	5.5%	18.8%	18.8%
	<i>Unlikely</i>	43	4.3%	14.7%	33.6%
	<i>Possibly</i>	83	8.3%	28.4%	62.0%
	<i>Likely</i>	59	5.9%	20.2%	82.2%
	<i>Definitely Yes</i>	52	5.2%	17.8%	100.0%
	<i>Total</i>	292	29.2%	100.0%	
<i>Missing</i>	<i>Errors</i>	707	70.8%		
<i>Grand Total</i>		999	100.0%		

The results at the price point of \$60 are shown below. Again, the Valid Percent column indicates the proportion of respondents with the affirmative or negative responses. The results show a weak market base at this higher price, with only 17% likely or very likely to accept the new service at \$60/month.

6. Would you switch to a 10 Mbps Internet service (at least 100 times faster than your current connection), if it were \$60 per month for unlimited usage?					
		<i>Frequency</i>	<i>Percent</i>	<i>Valid Percent</i>	<i>Cumulative Percent</i>
<i>Valid</i>	<i>Definitely Not</i>	93	9.3%	33.3%	33.3%
	<i>Unlikely</i>	61	6.1%	21.9%	55.2%
	<i>Possibly</i>	77	7.7%	27.6%	82.8%
	<i>Likely</i>	29	2.9%	10.4%	93.2%
	<i>Definitely Yes</i>	19	1.9%	6.8%	100.0%
	<i>Total</i>	279	27.9%	100.0%	
<i>Missing</i>	<i>Errors</i>	720	72.1%		
<i>Grand Total</i>		999	100.0%		

The “floor” or minimum potential market for Internet access on the MBN was established as those respondents who answered “Definitely Yes”. The “ceiling” or maximum potential market was defined as those who answered “Likely” and “Possibly” in addition. Merton, however, estimates the market potential as those respondents who answered “Definitely Yes” and “Likely”. The results of these estimates are presented below. Clearly, the market potential for MBN broadband Internet is quite substantial and robust if priced at \$40 per month, but declines significantly if priced at \$60/month.

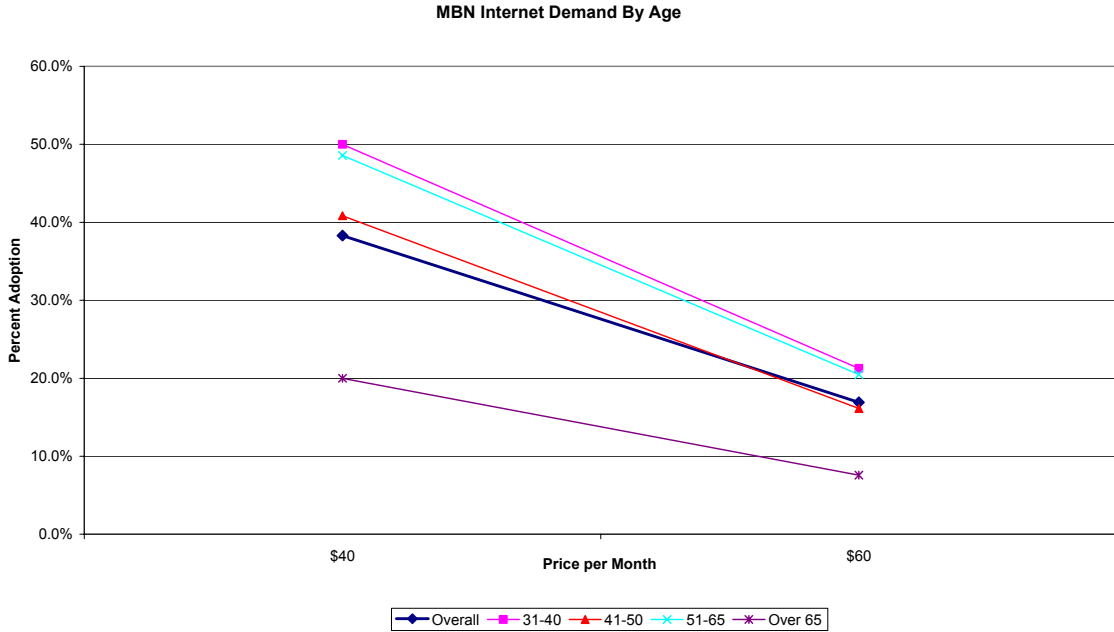


4.4.2 MBN Internet Price Sensitivity

The above information was further segmented by age of the respondent to get a better idea of which population segments to target for provision of MBN broadband Internet services. The results are presented in the chart below. These are the “demand curves” for MBN broadband Internet service.

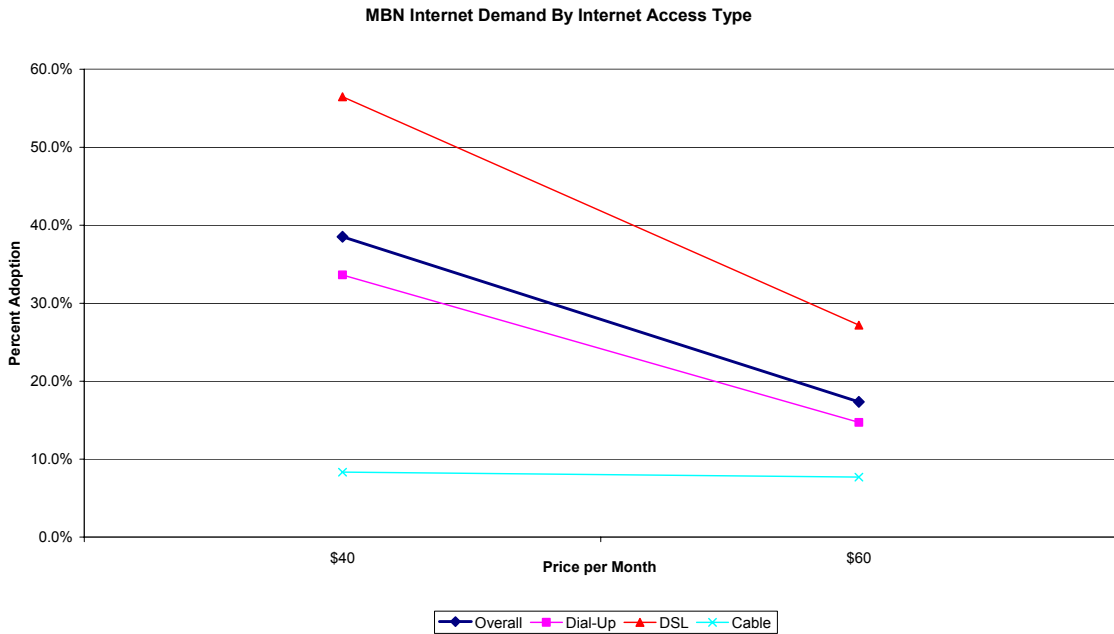
Two facts are very evident from the chart:

- There is a wide difference in interest in broadband Internet access across different age groups, varying from almost 50% amongst the 31-40 age group to about 20% only amongst the senior citizens of the town (over 65 years old), at \$40 per month.
- The demand for broadband Internet is very sensitive to the pricing. At \$40 per month, the estimated overall demand is 38%, falling to 17% at \$60 per month.



4.4.3 MBN Internet Adoption by Current Access Type

The MBN broadband demand was also segmented by the type of Internet access service that the respondents currently have, i.e., dialup, cable modem, DSL or satellite. This greatly helps to better understand to what extent the current users of dial-up and DSL/cable modem type services would switch to a much faster service offered by the MBN. The analysis was performed at the two price points of \$40 and \$60 per month. The results are shown in the chart below.



It is an extremely interesting observation that almost 57% of current DSL users are likely to switch to the MBN level broadband service (10-100 Mbps) if the price were \$40 per month. Again, all segments of users are sensitive to the price of the broadband service.

4.5 MBN Video Services

4.5.1 MBN Video Adoption Rates

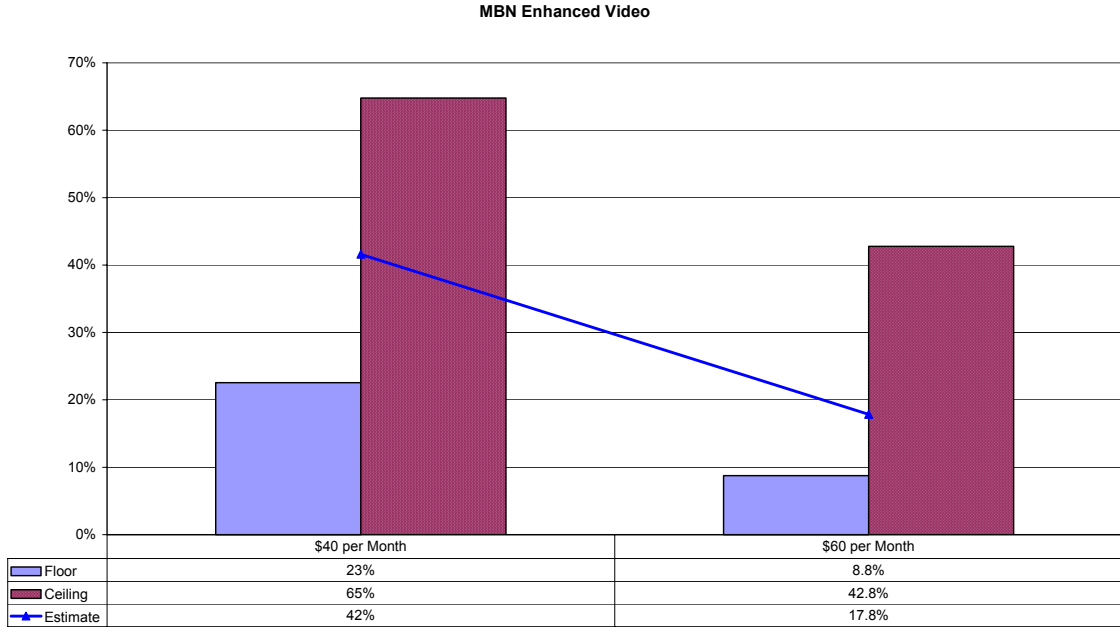
The respondents were asked the question how likely they would switch to enhanced video services on the MBN that would provide dozens of channels of programming. The survey asked this question at the two different price points, \$40/month and \$60/month, in two different forms of questionnaires. The results are shown below. The table below shows the results at the \$40 price point. The percentages in the Valid Percent column indicate the proportion of households responding with the respective affirmative or negative reaction. The results are very favorable, with 42% likely or very likely to switch.

7. Would you be willing to pay \$40 per month for digital quality cable TV with dozens of channels of news, sports, music and movies?					
		<i>Frequency</i>	<i>Percent</i>	<i>Valid Percent</i>	<i>Cumulative Percent</i>
<i>Valid</i>	<i>Definitely Not</i>	58	5.8%	18.4%	18.4%
	<i>Unlikely</i>	53	5.3%	16.8%	35.2%
	<i>Possibly</i>	73	7.3%	23.2%	58.4%
	<i>Likely</i>	60	6.0%	19.0%	77.5%
	<i>Definitely Yes</i>	71	7.1%	22.5%	100.0%
	<i>Total</i>	315	31.5%	100.0%	
<i>Missing</i>	<i>Errors</i>	684	68.5%		
<i>Grand Total</i>		999	100.0%		

The results at the price point of \$60 are shown below. Again, the Valid Percent column indicates the proportion of respondents with the affirmative or negative responses. The results show a weak market base at this higher price, with only about 18% likely or very likely to accept the new service at \$60/month.

7. Would you be willing to pay \$60 per month for digital quality cable TV with dozens of channels of news, sports, music and movies?					
		<i>Frequency</i>	<i>Percent</i>	<i>Valid Percent</i>	<i>Cumulative Percent</i>
<i>Valid</i>	<i>Definitely Not</i>	97	9.7%	32.7%	32.7%
	<i>Unlikely</i>	73	7.3%	24.6%	57.2%
	<i>Possibly</i>	74	7.4%	24.9%	82.2%
	<i>Likely</i>	27	2.7%	9.1%	91.2%
	<i>Definitely Yes</i>	26	2.6%	8.8%	100.0%
	<i>Total</i>	297	29.7%	100.0%	
<i>Missing</i>	<i>Errors</i>	702	70.3%		
<i>Grand Total</i>		999	100.0%		

The “floor” or minimum potential market for enhanced video services on the MBN was established as those respondents who answered “Definitely Yes”. The “ceiling” or maximum potential market was defined as those who answered “Likely” and “Possibly” in addition. Merton, however, estimates the market potential as those respondents who answered “Definitely Yes” and “Likely”. The results of these estimates are presented below. The market for MBN video appears to be stronger and more robust than the market for MBN Internet services.

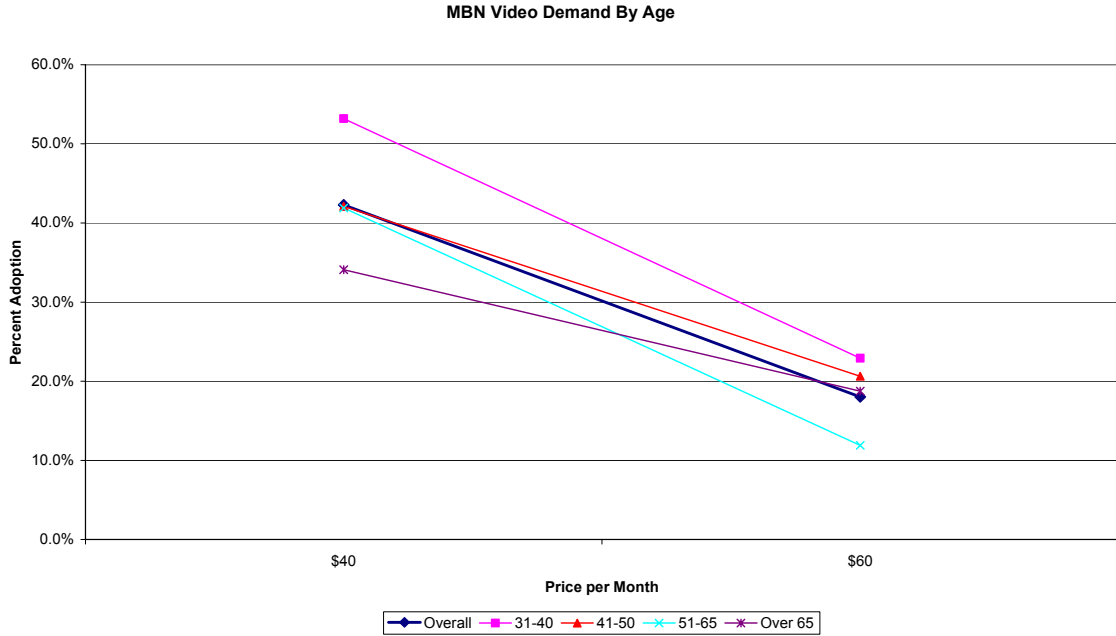


4.5.2 MBN Video Price Sensitivity

The above information was further segmented by age of the respondent to get a better idea of which population segments to target for provision of MBN video services. The results are presented in the chart below. These are the “demand curves” for MBN enhanced video.

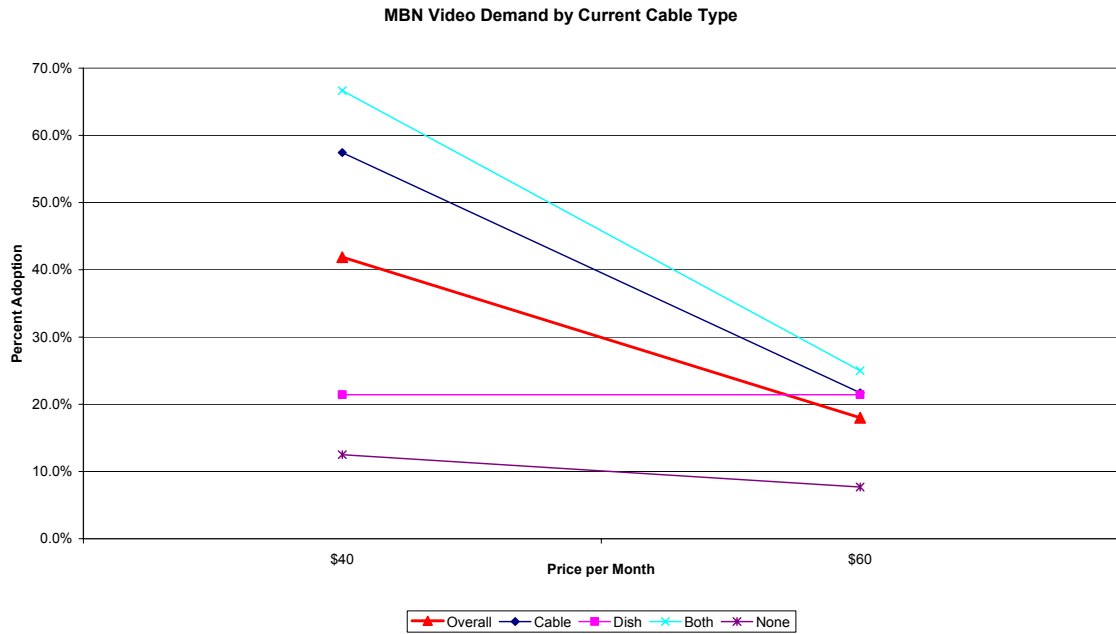
Two facts are very evident from the chart:

- There is a wide difference in interest in enhanced video services across different age groups, varying from almost 54% amongst the 31-40 age group to about 34% amongst the senior citizens of the town (over 65 years old), at \$40 per month.
- The demand for enhanced video is very sensitive to the pricing. At \$40 per month, the estimated demand is 42%, falling to 18% at \$60 per month.



4.5.3 MBN Video Demand by Current Access Type

The demand for enhanced video services was also segmented by the type of cable or satellite TV service that the respondent currently subscribes to. The results are shown below.



Clearly, there is a huge propensity for the current subscribers of both cable and satellite TV services to switch to MBN video at \$40/month. The current dish TV subscribers appear to be dissatisfied with either the quality of service or the price they are paying right now, and form the most willing segment of users to

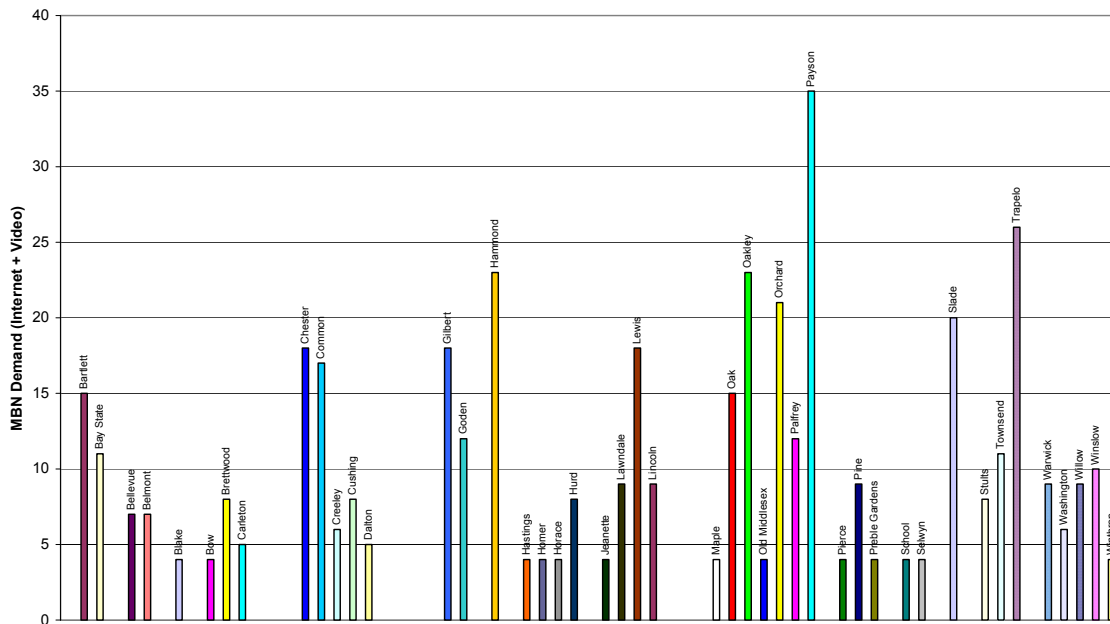
move to video services potentially offered on the MBN. In addition, homes that use both cable and satellite TV services are highly inclined to switch, about 67% likely or very likely to do so at \$40 per month.

4.6 MBN Demand by Street Location

The survey also attempted to determine the number of households who are likely to switch to MBN Internet or video services by the location of their street in the Town. The respondents were asked to provide the name of the street on which they live (not their street address). Merton then cross-tabulated the street information with the demand data for MBN Internet and video services at both price points of \$40/month and \$60/month, and arrived at a metric of demand by street location. The metric for a given street simply measures the sum of the number of households on that street who are either likely or very likely to switch to MBN services. Such results are expected to be useful in determining, or at least influencing, the initial and ongoing design of the buildout of the MBN in the Town.

The results of demand by street location from the survey are influenced by the number of households on a given street participating in the survey. Although the questionnaires were sent out by the Town to randomly selected households, some streets had many more households responding than did others; such a bias could potentially be eliminated by surveying every household on every street, not a cost-effective solution. In addition, there are significant differences in number of households on the various streets in the Town.

Notwithstanding the above, the results in the chart below give an idea for the geographical dispersion of MBN demand in Belmont; in the interest of readability, the chart presents only those streets that had a minimum of four households that are likely or very likely to switch to MBN Internet or video services.



4.7 General Demographics

4.7.1 Age

The column “Valid Percent” represents the age of the respondents.

1. What is your age?					
		<i>Frequency</i>	<i>Percent</i>	<i>Valid Percent</i>	<i>Cumulative Percent</i>
<i>Valid</i>	<i>Below 30</i>	28	2.8%	4.6%	4.6%
	<i>31-40</i>	95	9.5%	15.7%	20.4%
	<i>41-50</i>	144	14.4%	23.8%	44.2%
	<i>51-65</i>	164	16.4%	27.2%	71.4%
	<i>Over 65</i>	173	17.3%	28.6%	100.0%
	<i>Total</i>	604	60.5%	100.0%	
<i>Missing</i>	<i>Errors</i>	395	39.5%		
<i>Grand Total</i>		999	100.0%		

5. EXHIBIT A: MARKET RESEARCH QUESTIONNAIRES

Belmont Municipal Light Department – Citizen Survey



Date: _____

Street On Which You Live: _____

<i>Please answer the following questions by entering your choice number in the Responses column</i>	<i>Responses</i>
1. What is your age group? [1] Below 30 [2] 31-40 [3] 41-50 [4] 51-65 [5] Over 65	
2. What kind of Internet access service do you have at home? [1] Dial-up modem [2] DSL [3] Cable modem [4] Satellite [5] Not Applicable	
3. Who is your Internet service provider at home? [1] AoL [2] Verizon [3] Microsoft / MSN [4] AT&T / Comcast [5] Not Applicable	
4. Do you have cable or dish television at home? [1] Yes – Cable TV [2] Yes – Dish TV [3] Both Cable & Dish [4] Neither	
5. How many telephone lines (numbers) do you have at home? [1] None [2] One [3] Two [4] Three or more	
6. Would you switch to a 10 Mbps Internet service (<i>at least 100 times faster than your current connection</i>) if it were \$60 per month for unlimited usage? [1] Definitely Not [2] Unlikely [3] Possibly [4] Likely [5] Definitely Yes	
7. Would you be willing to pay \$60 per month for digital quality cable TV with dozens of channels of news, sports, music and movies? [1] Definitely Not [2] Unlikely [3] Possibly [4] Likely [5] Definitely Yes	
8. How would you rate the coverage of your cell phone service in Belmont? [1] Very Spotty [2] Spotty [3] Good [4] Very Good [5] Not Applicable	
<p><i>Please return the completed survey with your Electric bill!</i></p> <p><i>Thank you for you time.</i></p>	

Belmont Municipal Light Department – Citizen Survey



Date: _____

Street On Which You Live: _____

<i>Please answer the following questions by entering your choice number in the Responses column</i>	<i>Responses</i>
1. What is your age group? [1] Below 30 [2] 31-40 [3] 41-50 [4] 51-65 [5] Over 65	
2. What kind of Internet access service do you have at home? [1] Dial-up modem [2] DSL [3] Cable modem [4] Satellite [5] Not Applicable	
3. Who is your Internet service provider at home? [1] AoL [2] Verizon [3] Microsoft / MSN [4] AT&T / Comcast [5] Not Applicable	
4. Do you have cable or dish television at home? [1] Yes – Cable TV [2] Yes – Dish TV [3] Both Cable & Dish [4] Neither	
5. How many telephone lines (numbers) do you have at home? [1] None [2] One [3] Two [4] Three or more	
6. Would you switch to a 10 Mbps Internet service (<i>at least 100 times faster than your current connection</i>) if it were \$40 per month for unlimited usage? [1] Definitely Not [2] Unlikely [3] Possibly [4] Likely [5] Definitely Yes	
7. Would you be willing to pay \$40 per month for digital quality cable TV with dozens of channels of news, sports, music and movies? [1] Definitely Not [2] Unlikely [3] Possibly [4] Likely [5] Definitely Yes	
8. How would you rate the coverage of your cell phone service in Belmont? [1] Very Spotty [2] Spotty [3] Good [4] Very Good [5] Not Applicable	
<p><i>Please return the completed survey with your Electric bill!</i></p> <p><i>Thank you for you time.</i></p>	