



HANDELIVER

CABLE DIVISION
COMMERCE AND
CONSUMER AFFAIRS

2007 APR 30 A 11: 33

A _____ P _____ S _____

FILE _____

April 30,2007

Mr. Clyde Sonobe
Cable Administrator
Cable Television
Department of Commerce and Consumer Affairs
335 Merchant Street, #101
Honolulu, Hawaii 96813

Aloha, Clyde,

Enclosed please find a summary of research findings and questionnaire, both relating to a recently completed client survey about FOCUS, Channel 49.

If you have any questions on this matter, please don't hesitate to contact me at 834-0007, ext 105.

Respectfully,

Miki Lee
Administrative Projects Manager



Perceptions of the Addition of FOCUS 49 Among Clients Submitting Local Programming

A Quantitative Report

November 2006



Table of Contents

Objectives and Methodology.....	3
Executive Summary.. ..	5
Detailed Findings.. ..	8
Local Program Submissions.. ..	9
Awareness of FOCUS 49	13
Improvements	14
Pre-empting Shows.. ..	15
Primetime Airings.. ..	19
Speed to Premiere	22
Primetime vs. Repeat	24
'Ōlelo Promos.. ..	27
Other Means of Distribution.. ..	29
Conclusions.	30



Objectives and Methodology

- The objective of this research is

To measure any changes in perceptions of pre-emptions and primetime airings among clients who submitted local programming in 2004 or 2005 (prior to the addition of a sixth channel), in addition to 2006, as a result of the new channel FOCUS 49 being introduced in February of 2006.

- 'Olelo provided Ward Research with a list of clients who submitted local programming in 2006 and 2004; 2006 and 2005; or 2006 and 2004/2005¹.
 - 175 clients were submitted for 2004 and 123 clients for 2005.
 - After removing duplicate records and clients who did not recall submitting any local programs for 2004, 2005, or 2006, there were a total of 292 clients remaining.
- The table below presents the number of completed surveys along with the resulting maximum sampling error at a 95% confidence level.

	Total
Sample Size	147
Total Population*	292
Margin of Error	+/- 5.7%

¹ Clients who did not submit any local programming in 2004/2005 or 2006 were screened out of this study.

* Total population is based on the total sample received from 'Olelo of qualifying clients after removing duplicate records.



Objectives and Methodology

- Data was weighted in order to accurately represent 'Olelo's actual client makeup (local programming) in the Total figures. The following table provides the weights used.

Clients	Based on Client Sample Provided*	Total Completed Surveys	Weight Applied
2004	172 (59%)	106 (72%)	0.817
2005	120 (41%)	41 (28%)	1.473

* After removing duplicate records.

- The telephone survey was 9 minutes in length and was conducted between November 4 and 19, 2006.
 - Results for 2006 only include ten (10) months of programming compared to 12 months of programming for 2004 and 2005. Additionally, FOCUS 49 was introduced in February 2006 and clients are basing experiences with this additional channel on 8 months.
- All calling took place in the Calling Center in the Ward Research downtown Honolulu offices from 5-9 p.m. weekdays, and 9 a.m. to 9 p.m. weekends during the survey period. This Calling Center uses Computer-Assisted Telephone Interviewing (CATI) technology, which allows for 100% monitoring of calls through electronic and observational means.

Executive Summary



Executive Summary

Note: 2006 data covers only 10 months of the year, as the survey was administered in November 2006 (FOCUS 49 was introduced in February 2006). Clients surveyed include only those who submitted local programming in 2004/2005 and 2006.

- More clients submitted series programming than non-series programming in 2004/2005 and 2006.
 - 71% of clients submitted series programming; 45% of the clients submitted only series programming; 26% submitted both, and 29% submitted only non-series programming during 2004/2005 and 2006.
- On average, clients (submitting only series programs) reported submitting two (2) new, original, or premiere programs per month.
- On average, clients reported submitting 20 shows in 2006 (as of November 2006) and 24 shows in 2004/2005.
 - Clients who submitted primarily non-series programming submitted significantly fewer programs than did other clients (4-5 compared to 25-36 programs from clients who had at least some series programs).
- Within the first nine months of FOCUS 49's debut, the majority (82%) of clients surveyed were aware that 'Olelo added a new channel, FOCUS 49. When asked directly, half (49%) noticed improvements in some areas.
 - "More primetime airings" was reported by the largest percentage of clients (20%) compared to other areas.
- There is a significant level of recognition that services have been improved because of the addition of FOCUS 49.



Executive Summary

Pre-emptions:

- About one quarter (24%) of clients reported fewer pre-emptions since 2004/2005.
- Among the clients (59%) who reported no changes in the frequency of pre-emptions, the majority (68%) were never pre-empted and 23% reported being pre-empted “not very often” in 2006.
- Clients who submitted both series and non-series programs reported being preempted less often than before compared to other clients.
- Improvements in pre-emptions, specifically during the 2006 legislative season, were reported less frequently than they were for 2006 overall (as of November 2006).

Primetime Airings:

- Four out of ten clients (42%) reported some or great improvement in primetime airings in 2006 compared to 2004 or 2005.
- One-third (34%) of non-series program clients reported that they received an initial primetime airing all or most of the time in 2006.
- Improvements in initial primetime airings among non-series submitters were also noted by 26% of clients.
- Four out of ten (41 %) clients reported no change in primetime airings in 2006; and a third (33%) of those clients (reporting no change) reported receiving a primetime airing most or all of the time in 2006.
- Similar to pre-emptions, fewer clients reported improvements in primetime airings during the 2006 legislative season than did so for 2006 overall.
- Data regarding improvements in pre-emptions and primetime airings for election programming on VIEWS between 2004 and 2006 are not reported because of insufficient sample size (n=11).

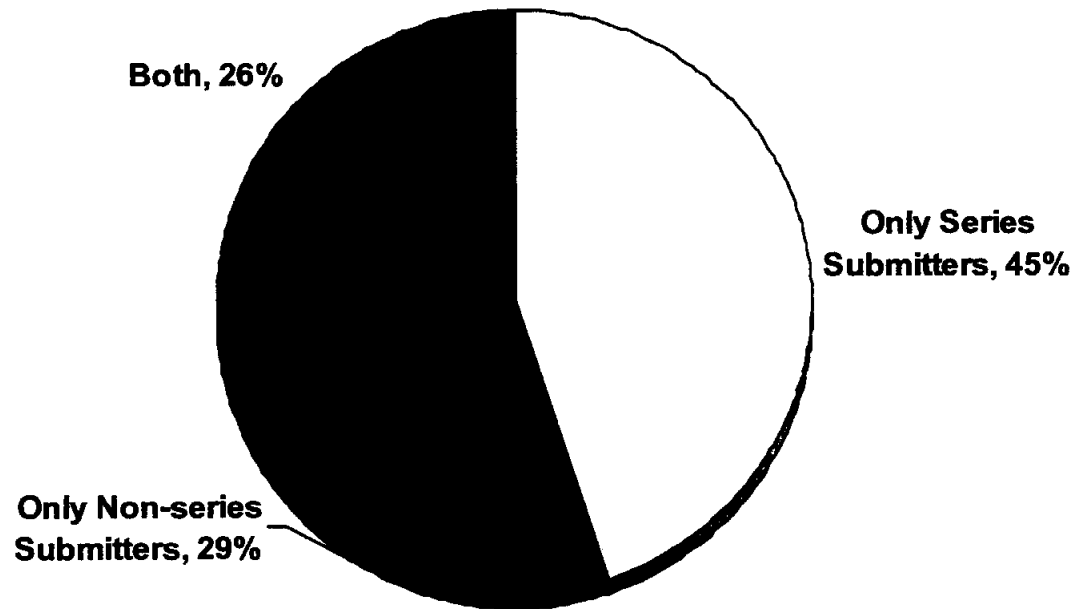
Detailed Findings



Local Program Submissions

A larger proportion of clients Submitted primarily series programming than non-series programming (45% vs. 29%, respectively). About a quarter (26%) submitted both types of programs.

Types of Surveyed Program Submitters During 2004/2005 and 2006
(n=147)



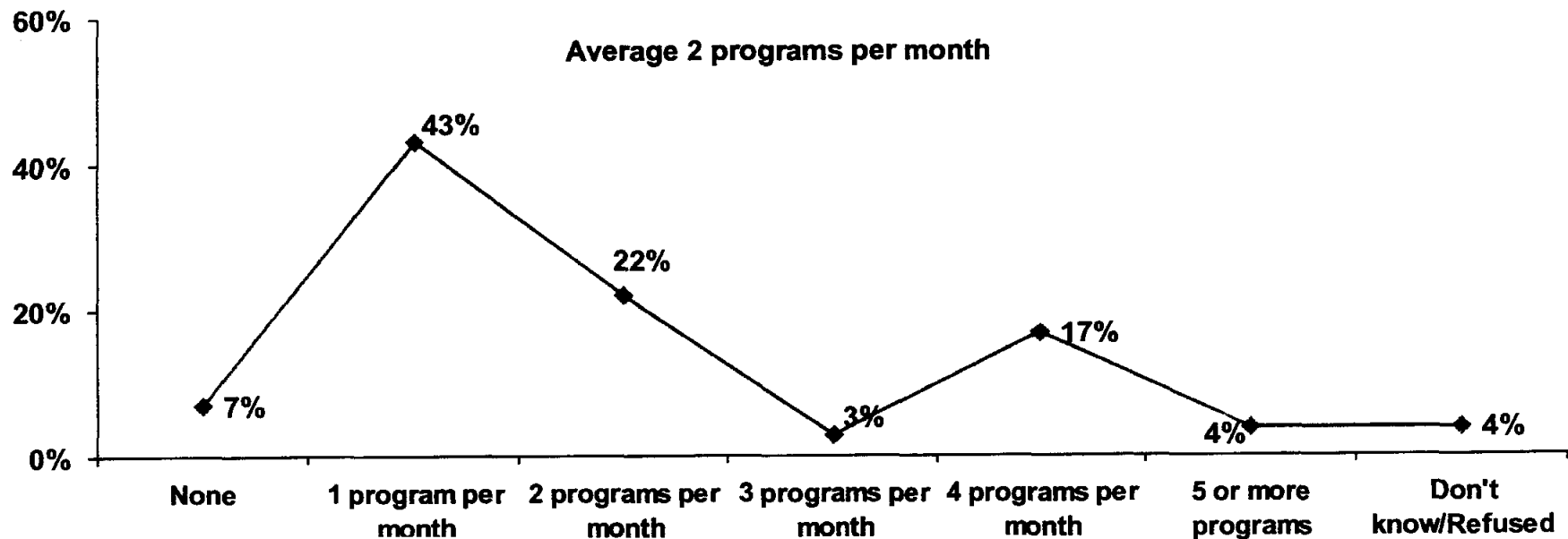


Local Program Submissions

Approximately four out of ten (43%) 'Olelo clients surveyed who submitted only series programs submit one new program per month on a consistent basis.

For those submitting only series programs, the average number of new, original, or premiere programs these clients recall submitting is 2 per month.

New, Original, Premiere Programs Consistently Submitted Per Month
(Among series-only submitters; n=66)

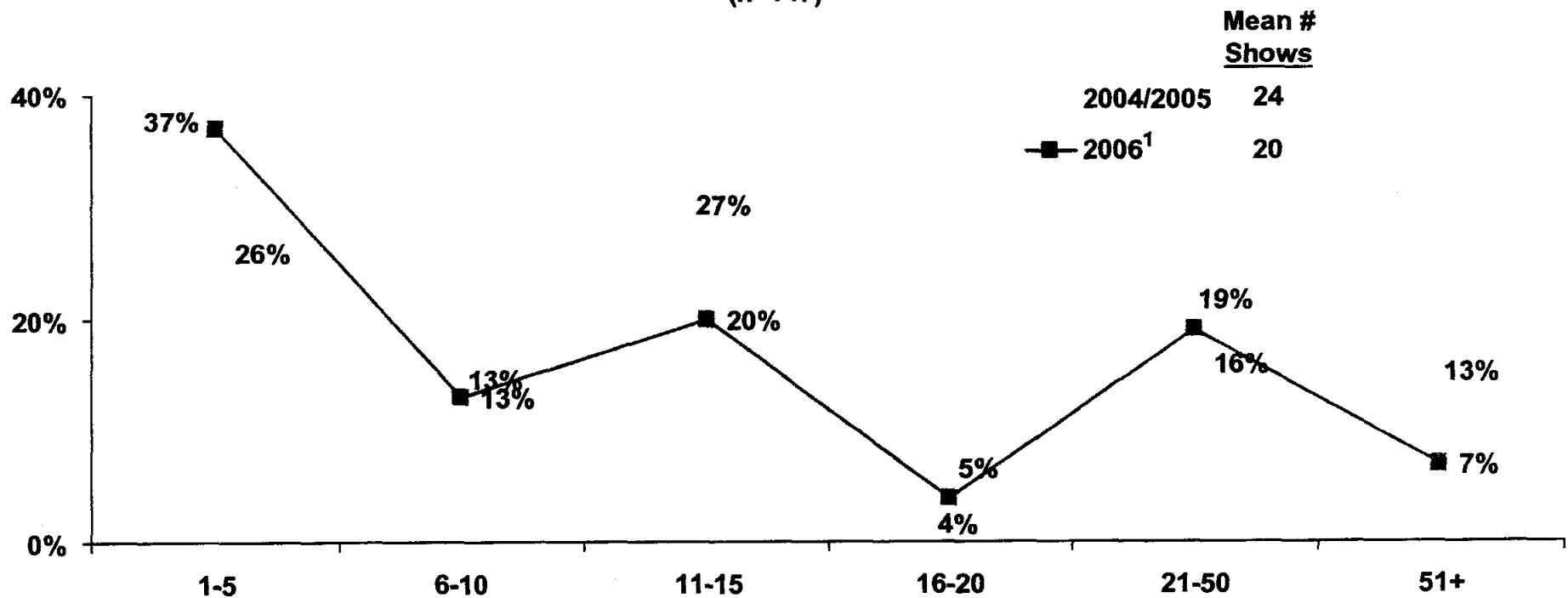




Local Program Submissions

On average, surveyed clients recall submitting 24 shows in 2004/2005 and 20 shows in 2006 (as of November 2006).

Number of Shows Clients Recall Airing on 'ōlelo Channels
(n=147)



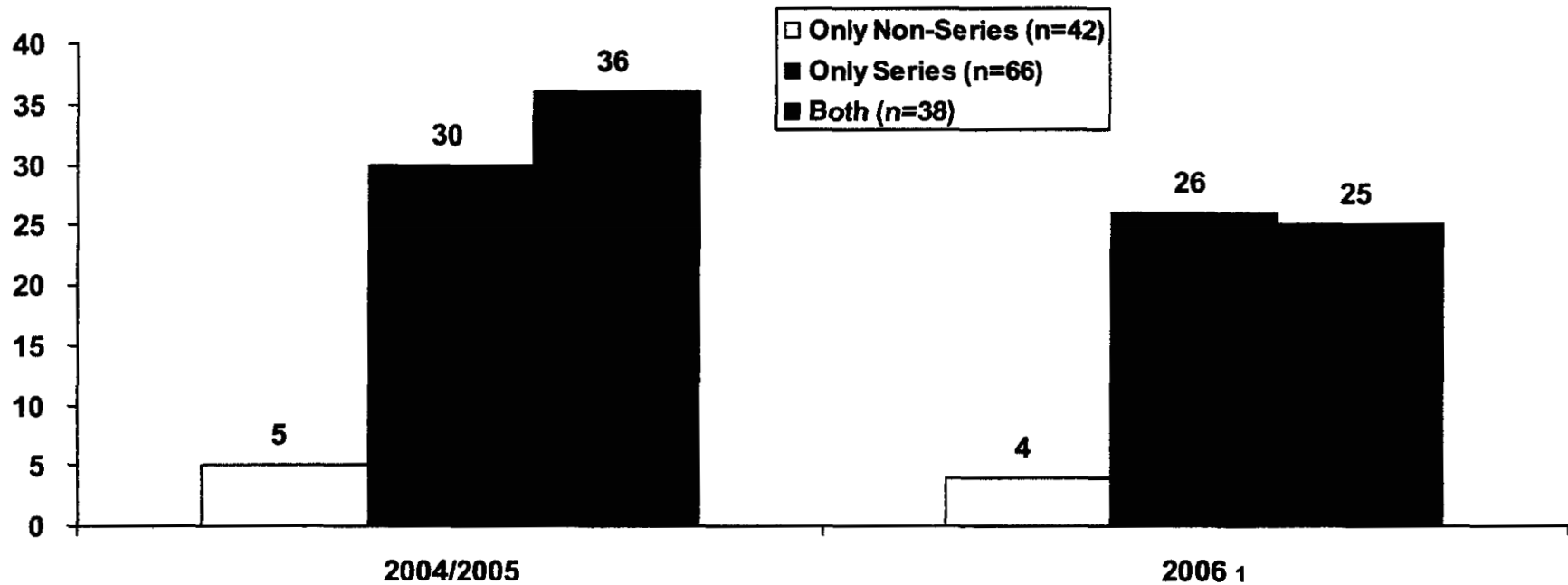
¹ 2006 data only includes up to November 2006.



Local Program Submissions

Clients who submitted only non-series programming report submitting significantly fewer programs in both current and past years compared to those who submit series programming.

Average Number of Shows Aired on 'Ōlelo Stations in 2004/2005 and 2006



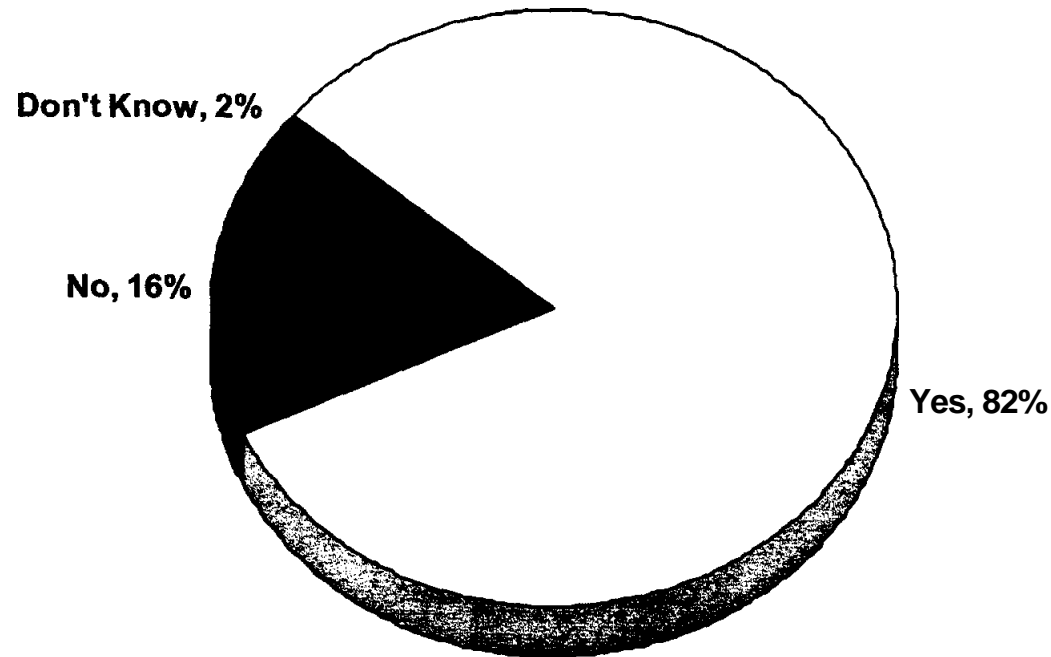
¹ 2006 data only includes up to November 2006.



Awareness of FOCUS 49

In the first nine months of FOCUS 49's debut (in February 2006), the majority of clients surveyed (82%) were aware that 'Olelo added the new channel.

Awareness of New 'Olelo Channel - Focus 49
(n=147)

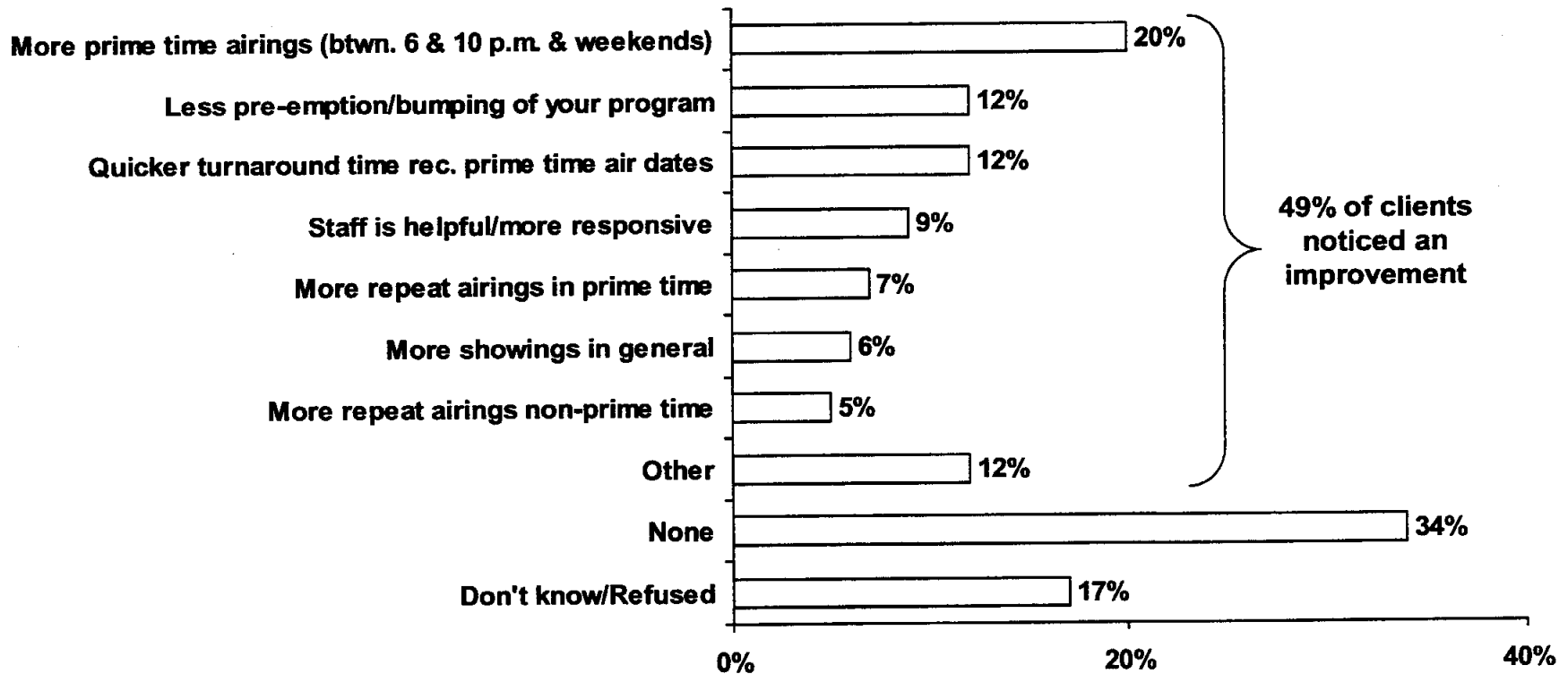




Improvements

Half of the clients surveyed (49%) noticed that there have been improvements as a result of adding a sixth channel – FOCUS 49. The majority of those improvements were in more primetime airings. Respondents were able to choose more than one area of improvement.

Improved Areas in Airing Your Programs as a Result of FOCUS 49 Channel
(n=147)

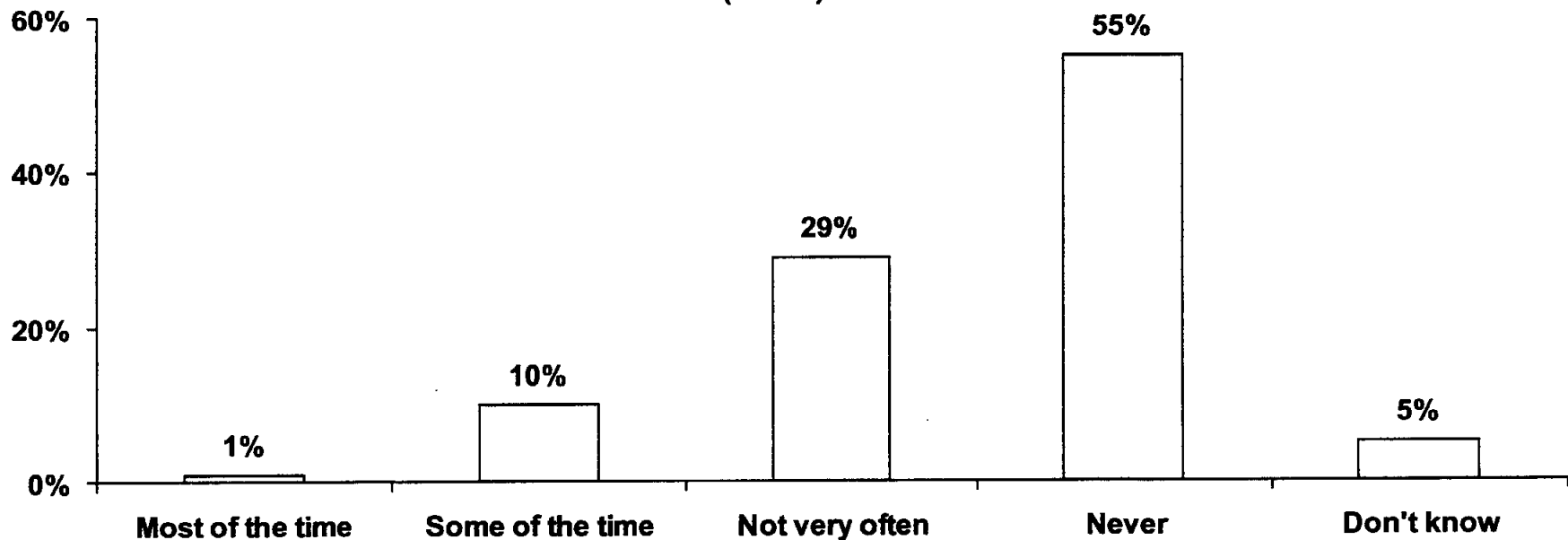




Pre-empting Shows

Over half (55%) of 'Olelo's clients surveyed stated they were never moved or pre-empted by other programming in 2006. Another three out of ten (29%) stated they were not moved very often.

**Frequency of Moved or Pre-Empted Shows
by Other Programming in 2006¹**
(n=147)



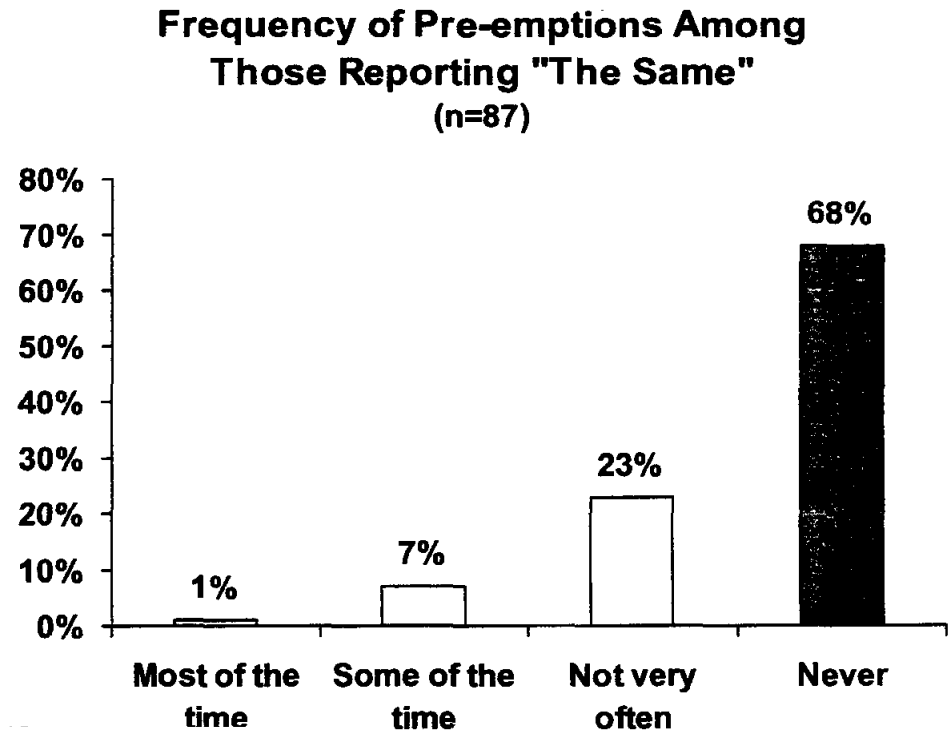
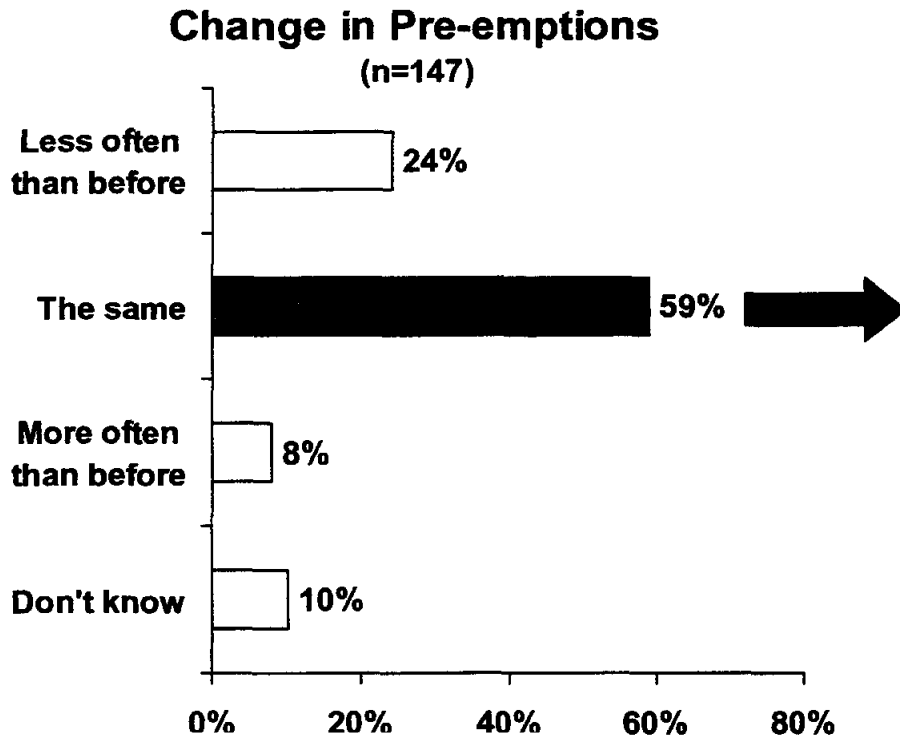
¹ 2006 data only includes up to November 2006.



Pre-empting Shows

About a quarter (24%) of clients surveyed reported fewer pre-emptions when compared to 2004 or 2005.

While the majority (59%) stated that the amount of shows that were moved or pre-empted was the same, 68% of those reporting "the same" were never pre-empted in 2006.

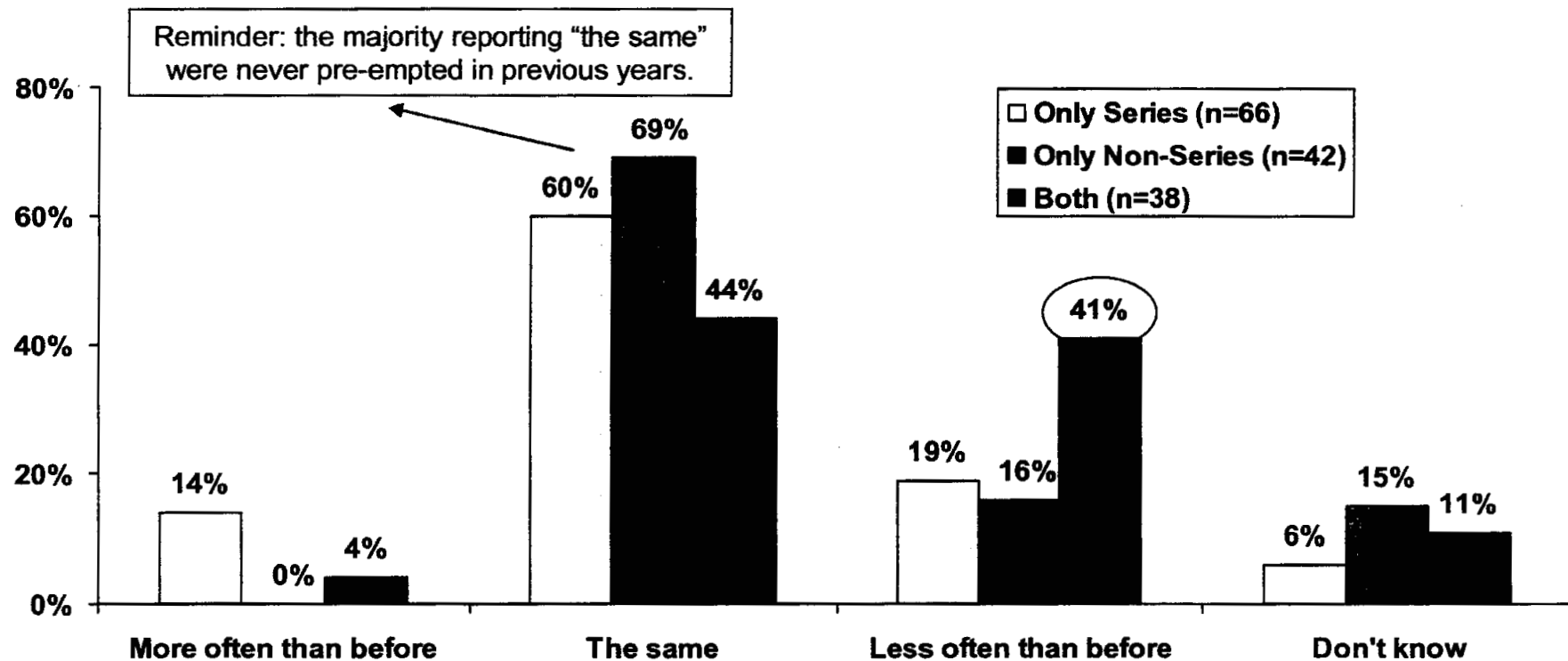




Pre-empting Shows

Clients who submitted both series and non-series programming were more likely than others to report that the frequency of pre-emptions in 2006 is less often than before (41% vs. 19% series and 16% non-series).

Change in Pre-emptions by Type of Program Submitted





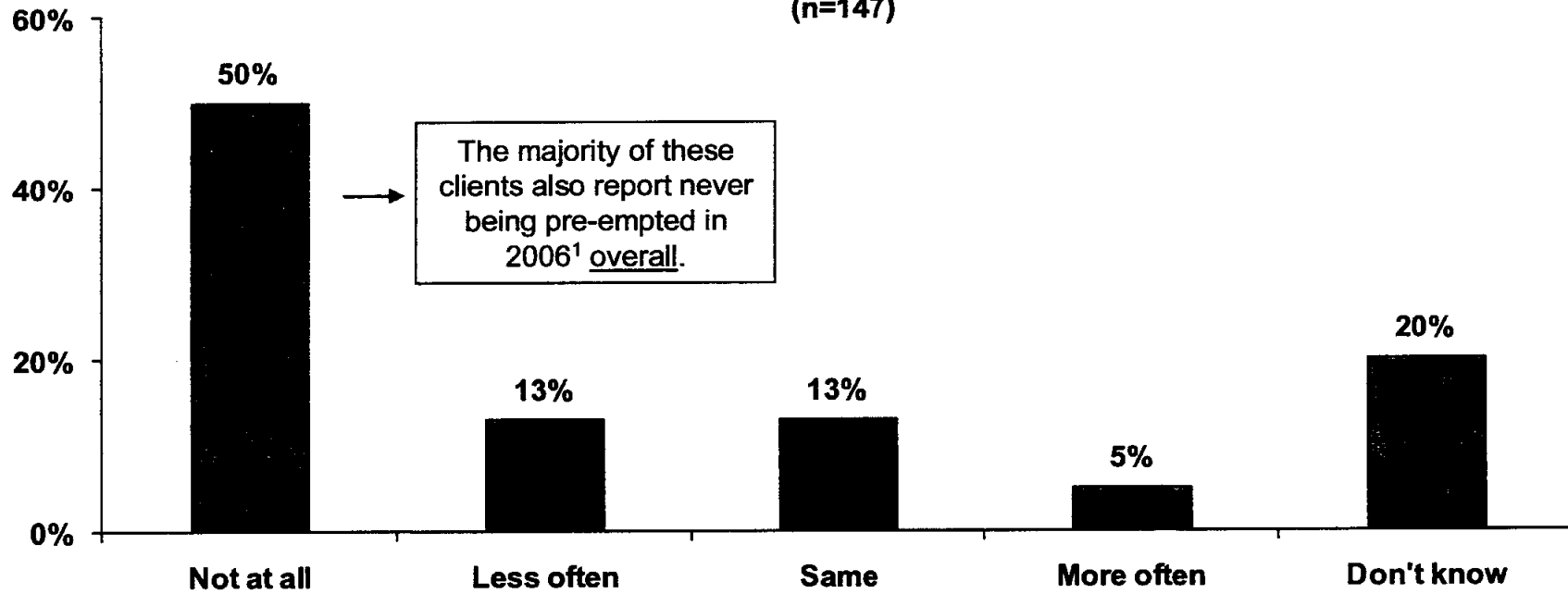
Pre-empting Shows – Legislative Season

Half (50%) of the clients surveyed recall not being pre-empted at all during the 2006 legislative season.

The majority of these clients also report never being preempted in 2006 overall.

**How Often Program Pre-Empted During Legislative Season
in Comparison to 2004/2005**

(n=147)



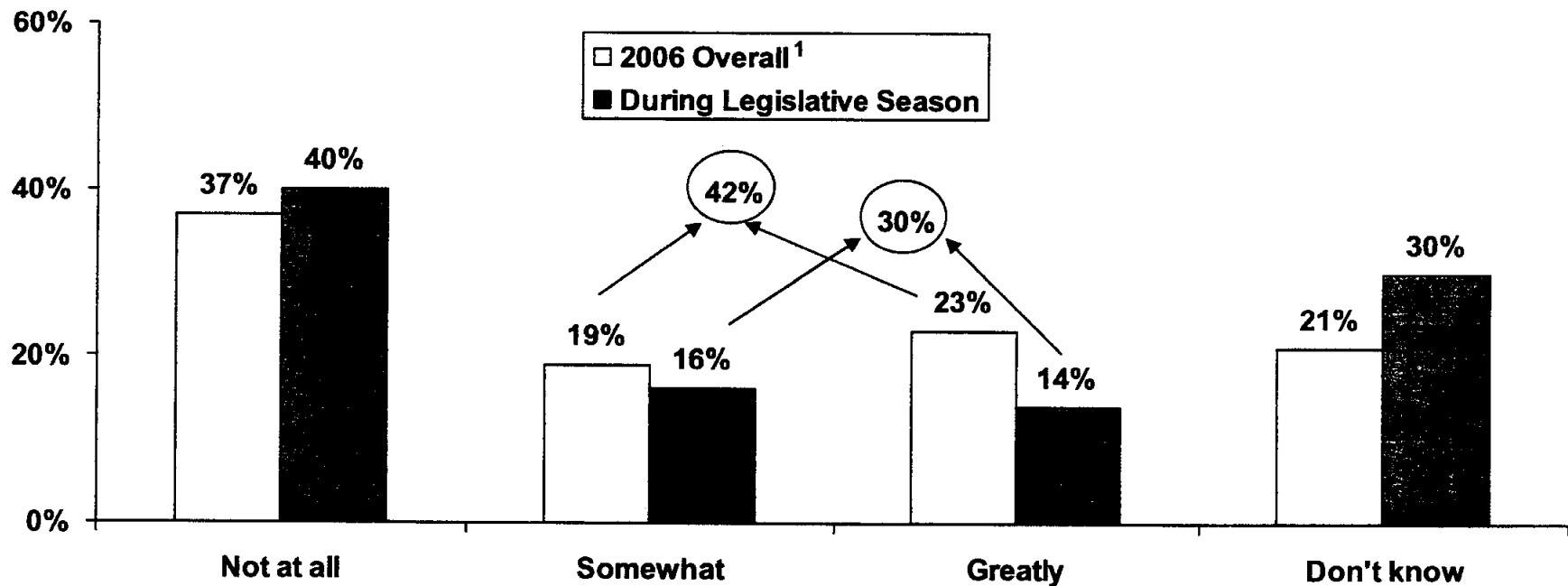
¹ 2006 data only includes up to November 2006.



Primetime Airings

Three out of ten (30%) 'Olelo clients surveyed reported seeing somewhat or great improvements in primetime airings during the legislative season. More clients (42%) reported seeing somewhat or great improvements in primetime airings during 2006¹ overall.

Improvement in Number of Prime Time Airings in Comparison to 2004/2005
(n=147)



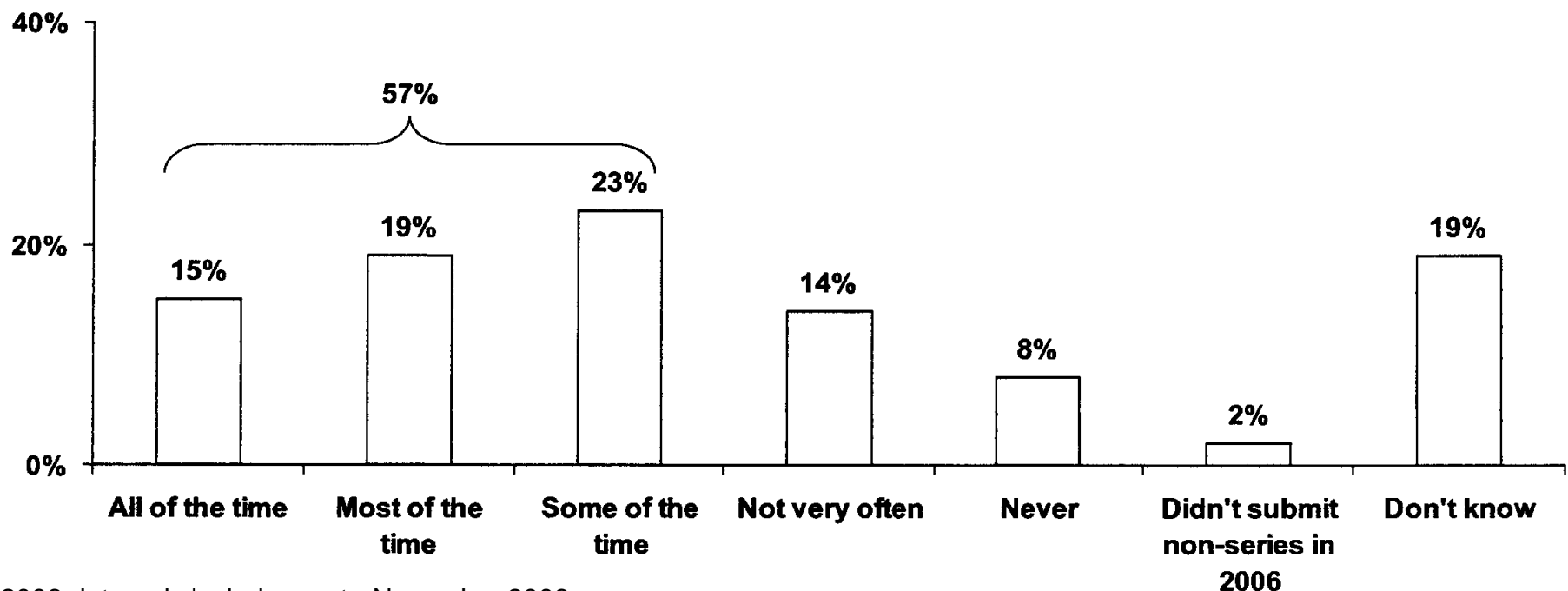
¹ 2006 data only includes up to November 2006.



Primetime Airings – Non-Series

Over half of the clients (57%) stated that their non-series programs received an initial primetime airing in 2006¹ at least some of the time.

How Often Non-Series Programs Received an INITIAL Primetime Airing in 2006¹
(Among those who submitted a non-series program; n=80)



¹ 2006 data only includes up to November 2006.

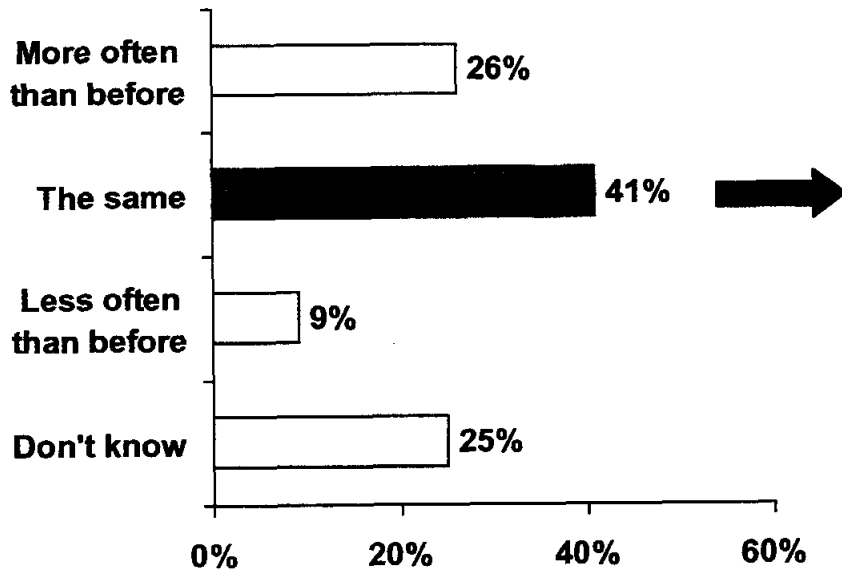


Primetime Airings – Non-Series

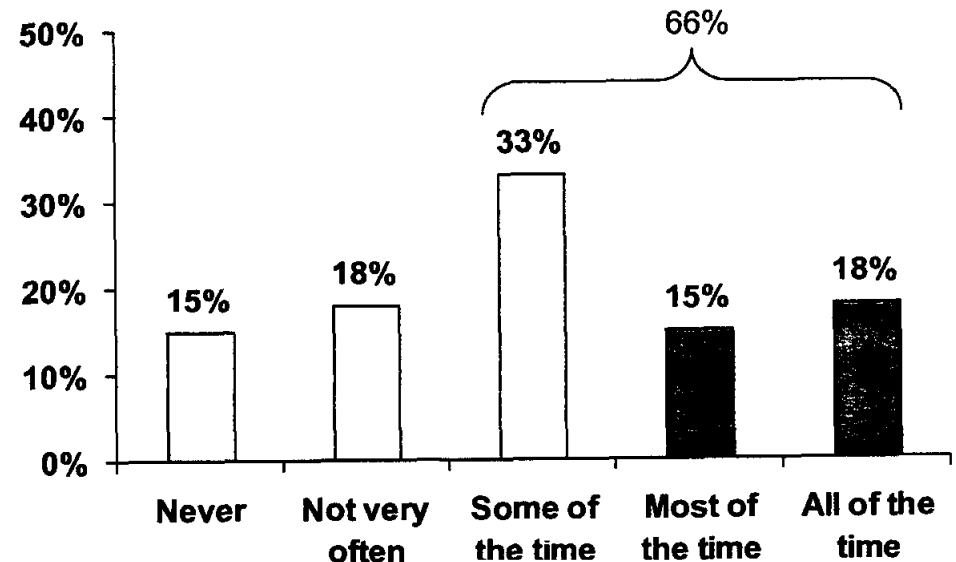
One-quarter (26%) of clients stated that the frequency of initial primetime airings in 2006¹ is more often than they recall in 2004 or 2005.

Of the 41% who reported the frequency to be "the same", 66% reported receiving an initial primetime airing at least some of the time.

Change in Primetime Airings
(Among those who submitted a non-series program; n=80)



Frequency of Primetime Airings Among Those Reporting "The Same"
(n=33)



¹ 2006 data only includes up to November 2006.

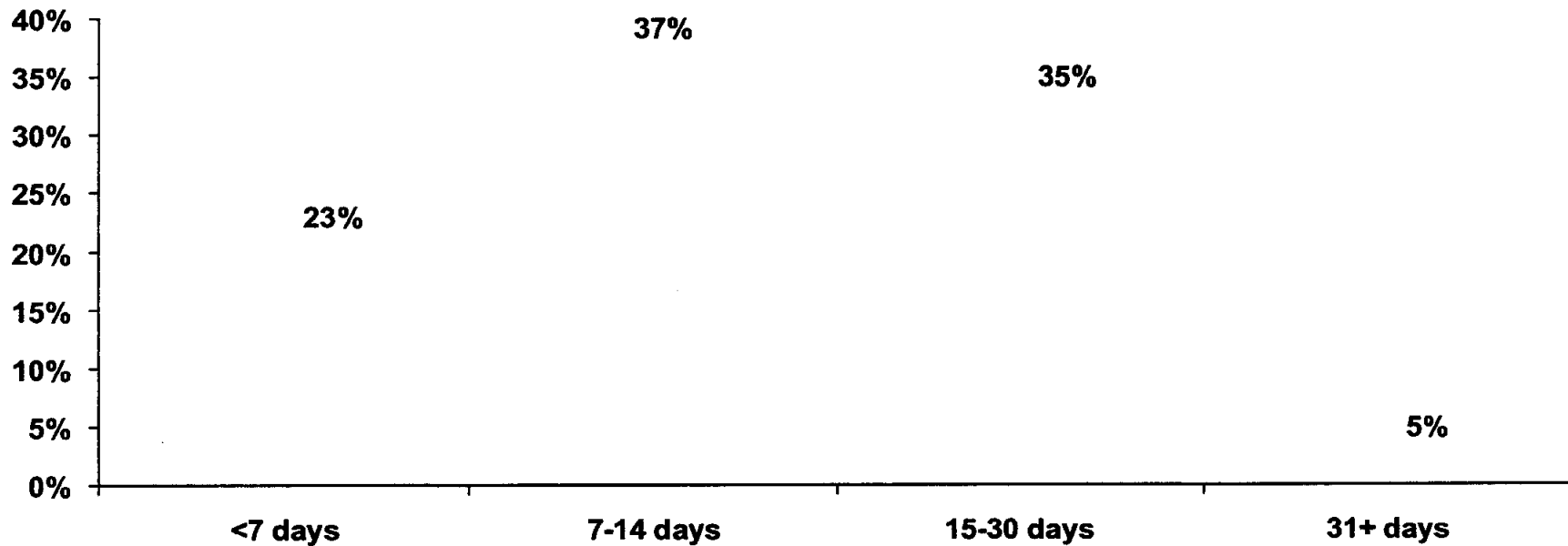


Speed to Premiere

Clients reported that it takes about 18 days, on average, for a non-series program* (of any length) to premiere in primetime after being submitted this year (2006¹).

Number of Days from Non-Series* Submission to Premiere in 2006¹ (n=80)

Average Days = 18 Days



* Series programs were not included since they have pre-assigned airtimes

¹ 2006 data only includes up to November 2006.

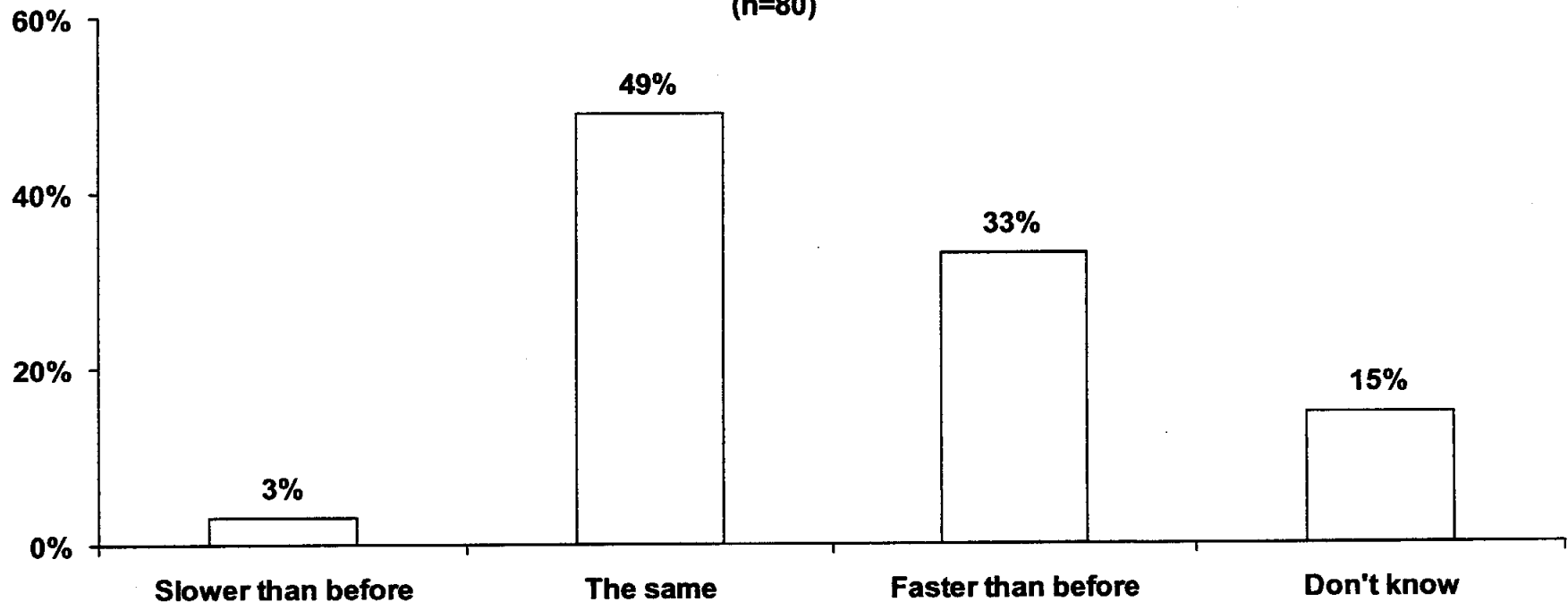


Speed to Premiere

About one-third (33%) of clients believe that the time it takes for a non-series program* to premiere in primetime after being submitted is faster than it was in 2004 or 2005.

Change in the Speed of Premiering Non-Series* Submissions

(n=80)



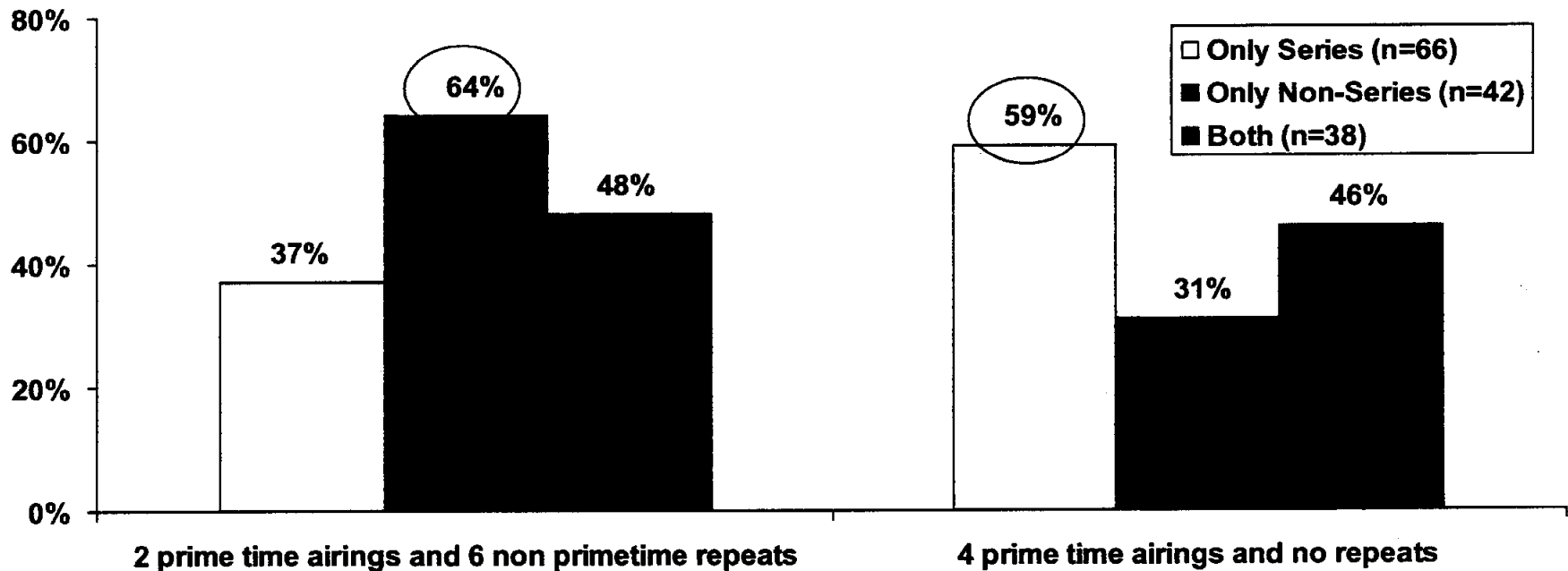
* Series programs were not included since they have pre-assigned airtimes



Primetime vs. Repeat

Clients who only submitted series programs are more likely to prefer 4 primetime airings and no repeats versus 2 primetime airings and 6 non-primetime repeats.

Preference of Prime Time Airings vs. Repeats by Type of Submissions

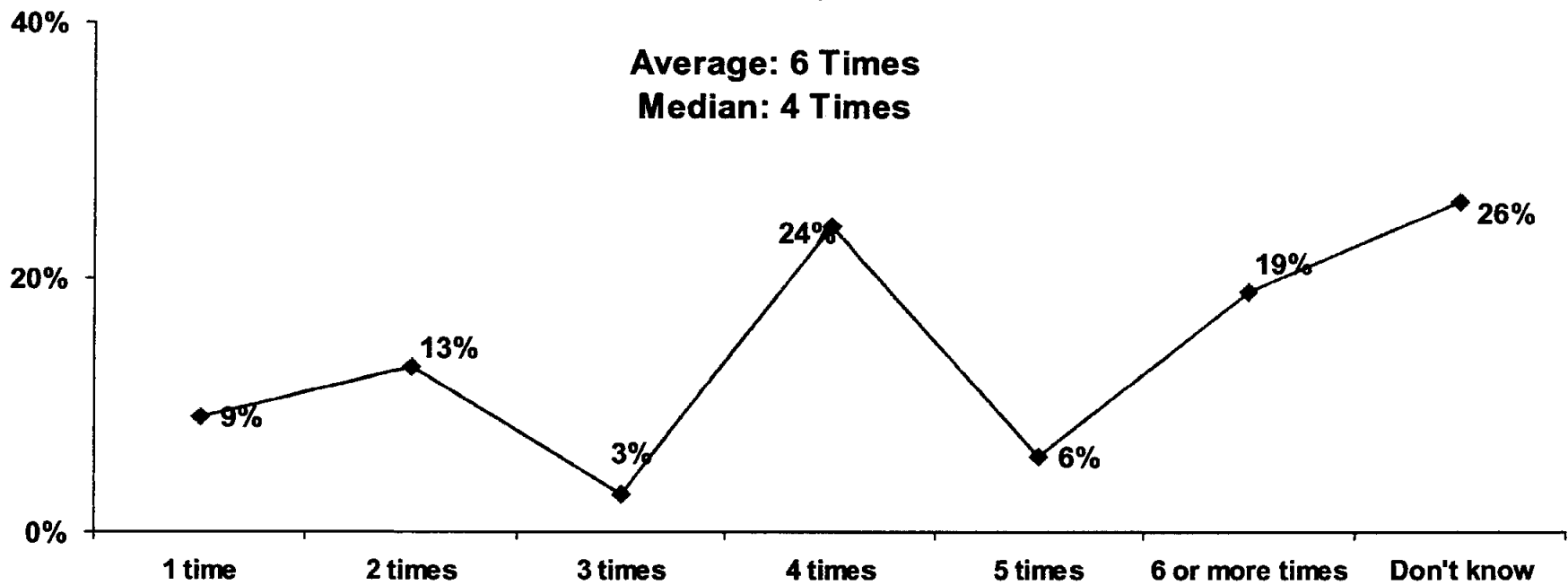




Primetime vs. Repeat

On average, clients believe a show needs to be aired 6 times in order for it to be considered effective in reaching their viewers.

Number of Times to Air in Order to Be Considered Effective
(n=147)

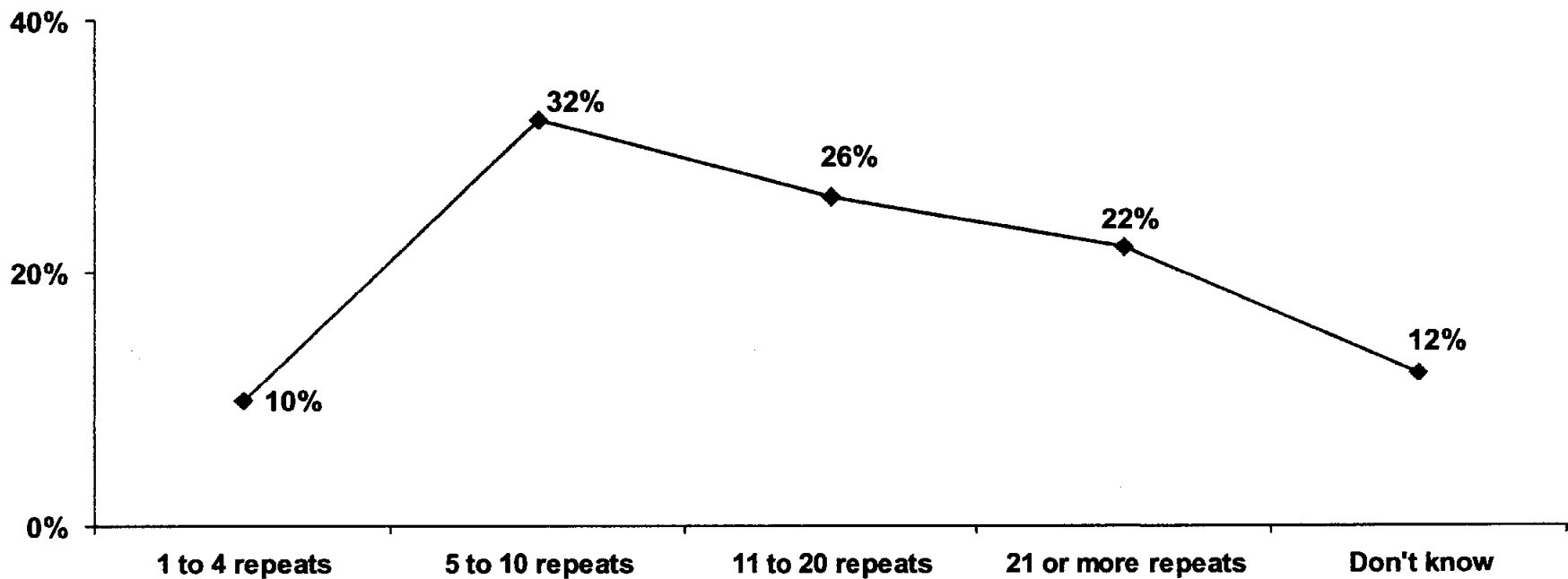




Primetime vs. Repeat

However, when given a specific range, about a third (32%) of clients believe that 5 to 10 repeats would be excessive. Another quarter (26%) believe that 11 to 20 would be excessive.

Airings or Repeats of Same Program Considered to Be Excessive
(n=147)



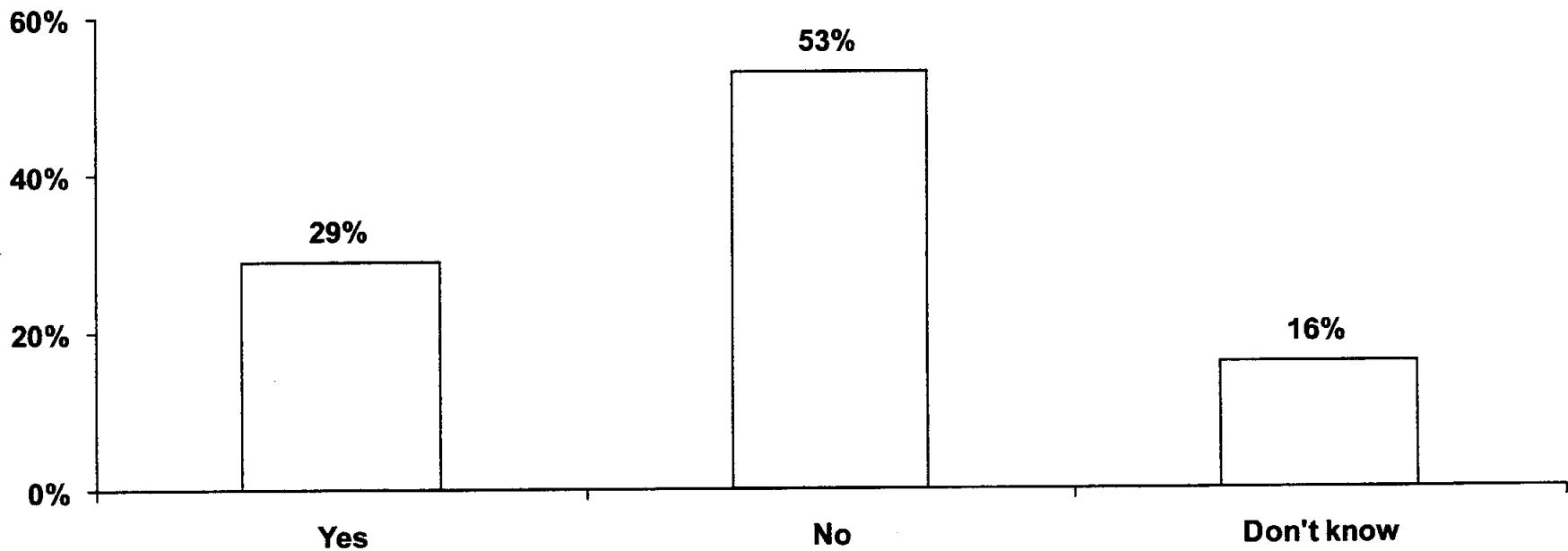


'Olelo Promos

Almost one third of clients (29%) reported greater awareness of their programs because of advertisements for block programming and/or FOCUS 49. Sixteen percent (16%) did not know if there was greater awareness of their programs.

Greater Program Awareness Due to Block Programming and FOCUS 49 Advertisements

(n=147)

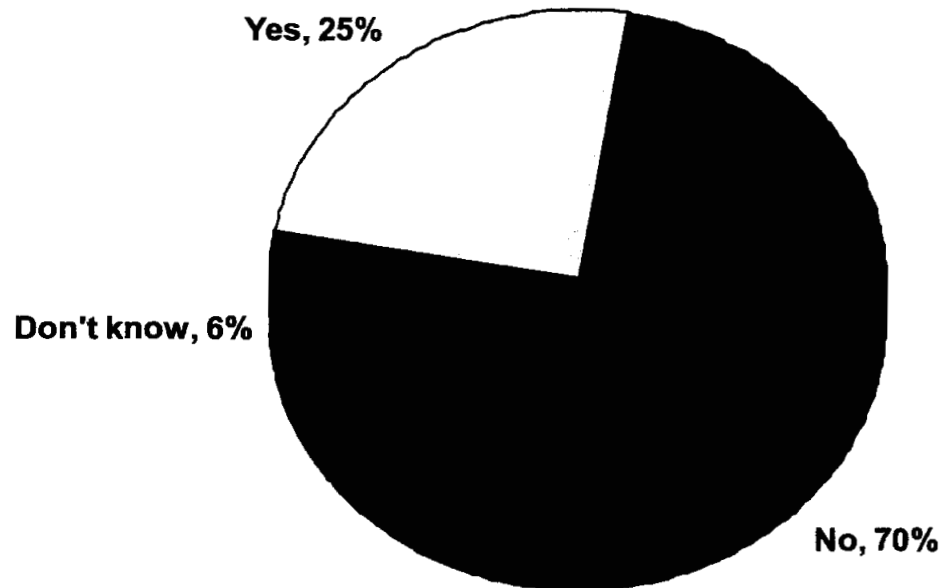




'Olelo Promos

One-quarter of clients surveyed (25%) recall seeing the 'Olelo promos on other Oceanic channels.

Saw 'Ōlelo Promos on Non-'Ōlelo Channels





Other Means of Distribution

This research finding is being withheld because the information is considered confidential, proprietary and/or competitively sensitive and shall not be disclosed, provided or otherwise disseminated.



Conclusions

- The majority of clients surveyed (82%) were aware that 'Olelo added a new station, FOCUS 49, and half (49%) noticed improvements in some areas as a result of this addition, when asked directly. Note that this is only in the first nine months of the channel's debut.
- While 24% of the clients surveyed report improvements in pre-emptions, two-thirds (68%) of the clients who reported no improvements (i.e. "the same" frequency) were never pre-empted and, therefore, had no room for further improvements.
- Four out of ten clients (42%) reported somewhat or great improvements in the number of primetime airings in 2006 overall (as of November 2006).
 - Improvements in initial primetime airings among non-series submitters are also noted by clients.
- Improvements were also reported during the legislative season, although to a lesser degree than reported during 2006 overall.
- The addition of FOCUS 49 has improved several different areas for clients who submitted local programming in 2004/2005, and 2006.

WARD RESEARCH, INC.

CLIENT SURVEY WR4335

Record Number _____ (v01)
Interviewer Name _____ Time Ended _____
Date _____ I.D.# _____ (v02) Time Started _____
Respondent Name _____ Total Minutes _____ (v03)
Respondent Phone Number - (v04)

Sample

2004 1
2005 2

Hello, I'm (_____) with Ward Research, a professional market research firm in Honolulu. We are calling on behalf of Olelo to do a satisfaction survey among its clients. You should have received an E-mail or phone call recently from Olelo informing clients that we would be calling.
[PAUSE FOR RESPONSE] 1) Yes 2) No - wrong name 3) No - wrong number

The purpose of the survey is to get your opinions and we are not selling anything. The survey will only take a few minutes and your responses will remain completely confidential. Would you have time now to answer a few questions? [IF NECESSARY: Let me also assure you that we do not have any information other than your name and telephone number.]

[INTERVIEWER: IF NO RECALL OF THE EMAIL OR CALL, AND RESPONDENT REQUESTS ONE, GO AHEAD AND FAX A COPY & SCHEDULE A CALL-BACK.] [NOTE TO INTERVIEWER: CONFIRM NAME. IF NAME/PHONE NUMBER IS WRONG, THANK AND TERMINATE. ASSIGN TO PROPER CODE ON CALL RECORD SHEET]

S1. CONFIRM RESPONDENT'S NAME

S2. (IF SAMPLE TYPE=1 THEN SAY:) According to 'Olelo's database, you have submitted programming that aired in 2004 and 2006...

(IF SAMPLE TYPE=2 THEN SAY:) According to 'Olelo's database, you have submitted programming that aired in 2005 and 2006...

[IF NECESSARY: Let me also assure you that we do not have any information other than your name and telephone number.] Is that correct?

Yes 1
No 2
Don't know **(DO NOT READ)**9 (v)

S3. Were any of your submitted programs longer than 15 minutes?

Yes 1
No 2
Don't know **(DO NOT READ)**9 (v)

IF S3=2 OR 9 TERMINATE

Q1. First of all, during **(INSERT "2004 AND 2006" FOR SAMPLE=1; "2005 AND 2006" FOR SAMPLE=2)**, have you primarily submitted series programs, non-series programs **(IF NECESSARY: Specials are non-series programs)** or both?

Series 1
Non-series 2
Both 3
Don't know **(DO NOT READ)**9 (v)

IF Q1=1 THEN CONTINUE; OTHERWISE SKIP TO Q3A

Q2. How many new programs do you consistently submit per month?
_____ (ENTER # 0-999)

Q3a. About how many shows did you air on any of the Olelo channels during **(IF SAMPLE=1 THEN "2004"; IF SAMPLE=2 THEN "2005")**?

_____ (ENTER # 0-999)

Q3b. And how many did you air on any of the Olelo channels during 2006?
_____ (ENTER # 0-999)

Q4a. Were you aware that Olelo added a new channel - Focus 49 - in February 2006?

- Yes 1
- No..... 2
- Don't know (**DO NOT READ**) 9 (v)

IF Q4A=1 CONTINUE; OTHERWISE SKIP TO Q5A

Q4b. In what areas, if any, did you experience improvement with respect to the airing of your programs as a result of Olelo's new channel, Focus 49? (**IF NECESSARY READ LIST**)

- More prime time airings (between 6 and 10pm and weekends) 1
- More repeat airings in prime time 2
- More repeat airings non-prime time3
- Less pre-emption/bumping of your program4
- Quicker turnaround time on receiving prime time air dates5
- Other (specify) 6
- None of the above 7
- Don't know/refused 8

Q5a. Now, thinking of just this year, how often have your shows been moved or pre-empted by other programming? (**READ 1-5**)

- All of the time..... 5
- Most of the time 4
- Some of the time 3
- Not very often 2
- Never..... 1
- Don't know (**DO NOT READ**).....9 (v)

Q5b. Compared to (**IF SAMPLE=1 THEN "2004"; IF SAMPLE=2 THEN "2005"**), is this...

- More often than before 1
- The same..... 2
- Less often than before..... 3
- Don't know (**DO NOT READ**).....9 (v)

Q5c. Did the number of prime time airings improve greatly, somewhat or not at all in 2006 compared to (**IF SAMPLE=1 THEN "2004"; IF SAMPLE=2 THEN "2005"**)?

- Greatly..... 1
- Somewhat..... 2
- Not at all 3

Don't know (DO NOT READ)9 (v)

Q5d. In the past, the large volume of legislative programming was cause for program pre-emptions During the 2006 legislative season, was your program pre-empted less often, the same, more often, or not at all, compared to (IF SAMPLE=1 THEN "2004"; IF SAMPLE=2 THEN "2005")?

Less than 1
same..... 2
More than 3
Not at all 4

Don't know (DO NOT READ)9 (v)

Q5e. During the 2006 legislative season, did the number of prime time airings improve greatly, somewhat or not at all compared to (IF SAMPLE=1 THEN "2004"; IF SAMPLE=2 THEN "2005")?

Greatly..... 1
Somewhat..... 2
Not at all 3

Don't know (DO NOT READ)9 (v)

IF SAMPLE=1 THEN CONTINUE; OTHERWISE SKIP TO Q7A

Q6a. Did you submit election or other programming for VIEWS, channel 54 in 2004?

Yes 1
No 2

Don't know (DO NOT READ)9 (v)

IF Q6A=2 or 9 THEN SKIP TO Q7A

Q6b. Did you submit election programming or other programming for VIEWS this year?

Yes 1
No 2

Don't know (DO NOT READ)9 (v)

IF Q6A=1 AND Q6B=1 THEN ASK Q6C; OTHERWISE SKIP TO Q7A

Q6c. Comparing the two election seasons, did your situation with possible pre-emption improve greatly, somewhat or not at all in 2006?

Greatly..... 1
Somewhat 2
Not at all 3

Don't know (DO NOT READ)9 (v)

Q6d. And again. comparing the two election seasons. did your number of prime time airings improve greatly. somewhat or not at all in 2006?

- Greatly..... 1
- Somewhat..... 2
- Not at all 3

- Don't know **(DO NOT READ)**9 (v)

IF Q1=2-3 THEN ASK Q7A; OTHERWISE SKIP TO Q9

Q7a. Now. please only think of this year. How often did your non-series programs receive an INITIAL prime time airing. that is between 6pm and 10pm or on weekends? **(READ 1-5)**

- All of the time..... 5
- Most of the time 4
- Some of the time 3
- Not very often 2
- Never..... 1

- Don't know **(DO NOT READ)**9 (v)

Q7b. Compared to **(IF SAMPLE=1 THEN "2004"; IF SAMPLE=2 THEN "2005")**, is this...

- More often then before 1
- The same..... 2
- Less often than before..... 3

- Don't know **(DO NOT READ)**9 (v)

Q8a. Again. just thinking of this year. approximately how many days does it take from the time you submit your non-series or specials program to the time it initially premieres in prime time? **(READ 1-4) (IF NECESSARY: "PLEASE GIVE YOUR BEST ESTIMATE")**

_____ **(ENTER # OF DAYS 1-99)**

Q8b. Compared to **(IF SAMPLE=1 THEN "2004"; IF SAMPLE=2 THEN "2005")**. is this...

- Faster than before 1
- The same..... 2
- Slower than before 3

- Don't know **(DO NOT READ)**9 (v)

Q9. Next I'd like you to think about the importance of prime time versus. repeat airings. I am going to read you two options. Please tell me which of the two options you would prefer... **(READ 1-2)**

- 2 primetime airings and 6 non-primetime repeats..... 1
- 4 prime time airings and no repeats 2
- Don't know **(DO NOT READ)** 9 (v)

Q10a. How many times do you think your show should air in order to be effective in reaching your viewers?

_____ (ENTER # OF AIRINGS)

Q10b. And how many airings or repeats of the same program would you consider excessive? **(READ 1-5)**

- 5 to 10 1
- 11 to 20 2
- 21 to 40 3
- 50 or more 4
- 100 or more 5
- Don't know **(DO NOT READ)**9 (v)

Q11. In 2006, we have taken steps to advertise block programming and FOCUS 49. As a result of this, have you experienced greater awareness of your programs?

- Yes 1
- No..... 2
- Don't know (DO NOT READ) 9 (v)

Q12. Did you see any of the 'Olelo promos on Oceanic Cable channels other than 'Olelo's?

- Yes 1
- No 2
- Don't know **(DO NOT READ)**9 (v)

Q13. If available. how likely would you be to use other means of distribution to get your program out. such as XXXXXXXXXX, XXXXXXXXXX, XXXXXXXX XXXXXXXXXX, XXX? *[Note: The question details are being withheld because the information is considered confidential,proprietary and/or competitively sensitive and shall not be disclosed. provided or otherwise disseminated.]* **(READ 1-5)**

- Definitely would 5
- Probably would 4
- Might or might not 3
- Probably would not..... 2
- Definitely would not..... 1

Don't know (DO NOT READ)9 (v)

Q14. (RECORD ONLY, DO NOT ASK) Gender

male..... 1

female 2 (v)

[Should already have name] That was my last question. Thank you very much for your help in completing the survey.