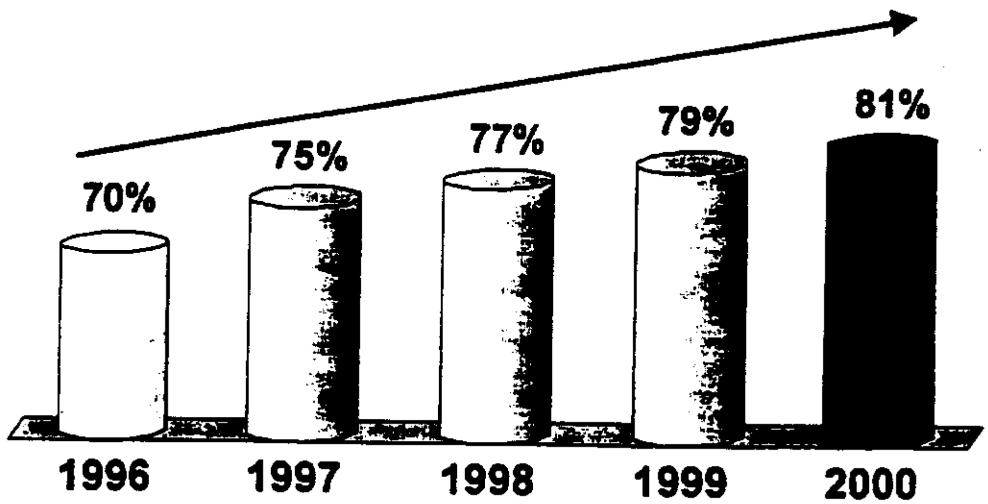
DETAILED FINDINGS

* Competitive Environment

Cable/Satellite TV Penetration Has Continued To Rise Steadily Since 1996.



Satellite-Only Households Experienced A 50% Increase Over Last Year, While Cable-Only Household Penetration Has Dropped Slightly From The Previous Year.

	1996	*1997*	*1998*	*1999*	*2000*
Cable-Only Households	64%	65%	68%	68%	66%
Households that have "Both" Cable & Satellite TV Services	1%	4%	2%	3%	3%
Satellite-Only Households	5%	6%	7%	8%	12%

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Source: 1996-2000 JDP&A Wireline CSI Studies

Cable Companies Still Account For An Overwhelming Majority Of The Cable And Satellite Market, Though Satellite Providers Have Experienced Tremendous Growth In Recent Years.

	1996	1997	1998	1999	2000
Cable Providers	%	%	%	%	%
AT&T Cable+	20	20	17	14	15
Time Warner	14	15	14	15	14
Cox	5	5	5	5	9
Comcast	9	9	9	10	8
Charter	2	3	3	5	7
Cablevision	*	5	6	8	6
Adelphia	1	3	4	5	6
MediaOne	6	5	6	7	5
Cable One	*	*	1	*	1
Others	38	27	25	20	13
Satellite Providers					
DirecTV	3	3	3	3	9
Primestar	2	2	2	2	2
Dish Network++	*	1	2	2	5
Others	4	7	3	6	2

Base: Subscribe to Cable/Satellite TV
+ Formerly TCI Cable
* Less Than 1%
Note: Columns may add to more than 100% due to HH's with both cable and satellite

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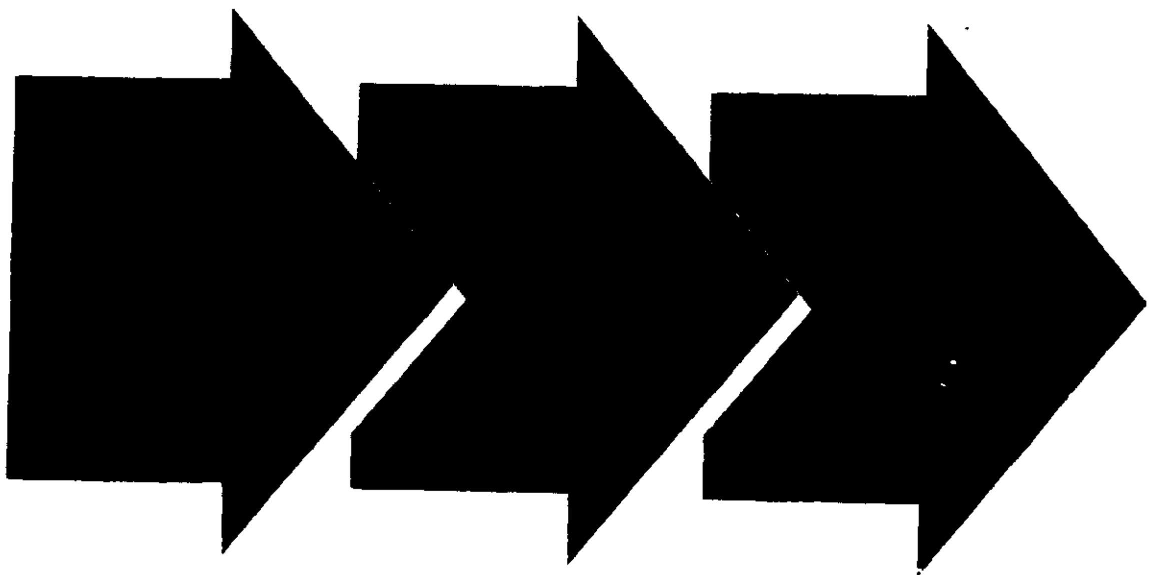
DETAILED FINDINGS

* Customer Satisfaction Measurement Process

Customer Satisfaction Measurement Process

We Employ The J.D. Power And Associates' Three Step Process To Measure Customer Satisfaction...



...The First Step, Factor Analysis, Groups Attributes Together Based On The Similarity Of Responses

Identifies unique satisfaction dimensions and eliminates non-discriminating dimensions

Customer Satisfaction Attributes Covered For Cable/Satellite TV Service

Cost of Service

- Total cost of monthly service
- Provides good value
- Cost of adding additional channels
- The initial cost of installation
- Cost of adding service to 2 or more TVs

Equipment & Service Capabilities

- Offers the services you want in your area
- Keeps service outages to a minimum
- Ability to restore service after temp. outages
- Equipment that is easy to operate
- Provides replacement or loaner equipment

Credibility/Billing

- Is a technical innovator and leader in the industry
- Company's reputation
- Company's honesty with no gimmicks, misleading ads or hidden charges
- Active in supporting activities in community
- Keeps you informed about new services or promotions
- Timeliness in making adjustments to your bill
- Ease of understanding Company correspondence such as bill inserts
- Availability of a variety of payment methods
- Company's ability to stand behind the services they sell
- Accuracy of your monthly bills
- Ease of understanding your monthly bills

Customer Service

- Has courteous customer service reps
- Can get through to customer service without being put on hold or transferred to different departments
- Has knowledgeable customer service reps
- Ability to resolve service issues in a timely manner
- Promptly makes changes to service when requested
- Thoroughness of information provided
- Has responsive customer service reps.
- Has a user-friendly automated response system
- Has convenient customer service hours
- Time it takes to reach a customer service rep

Program Offerings

- Offers channels you like as a part of "basic"
- Number of channels available
- Offers special discounts on select channels
- Makes it easy to find something to watch
- Provides a variety of program packages
- Ease of ordering pay-per-view
- Provides local programming

Reception Quality

- Consistently delivers clear reception on all channels
- Clarity of reception

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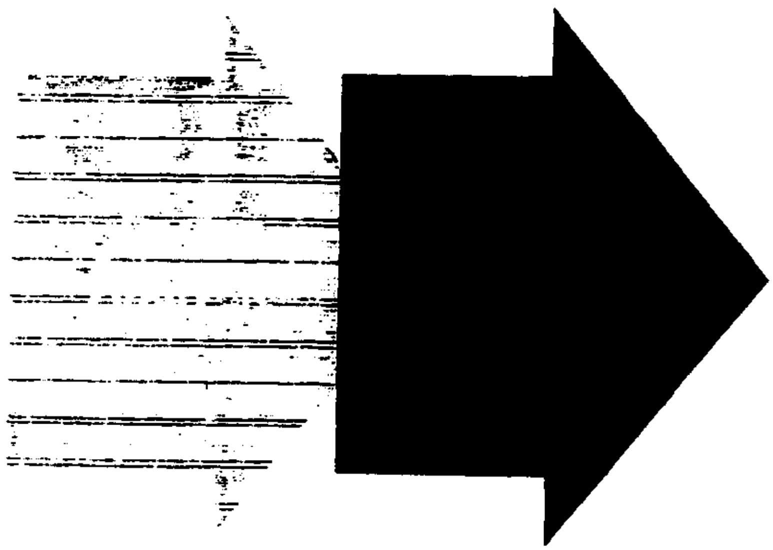
The Second Step, Regression Analysis, Identifies Strength Of Relationships Between Attributes And Overall Satisfaction.



Identifies unique satisfaction dimensions and eliminates non-discriminating dimensions

Identifies importance based on implied weights of each unique dimension

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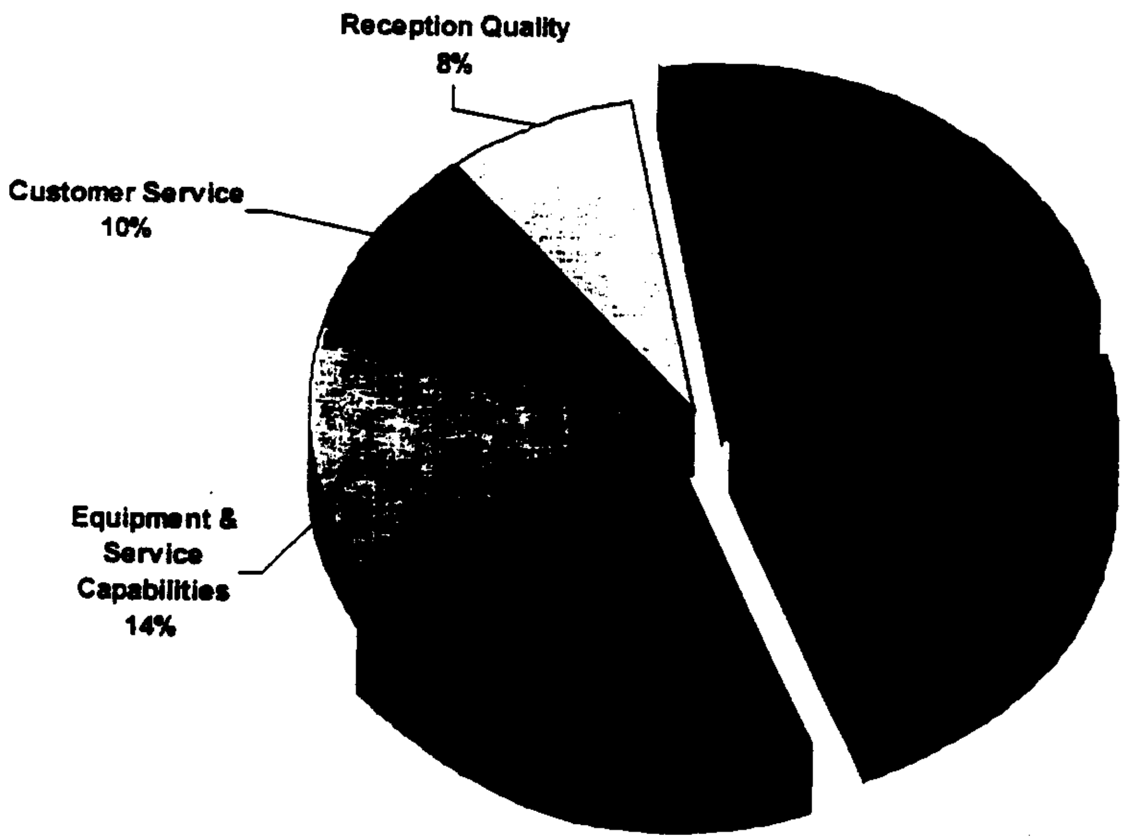
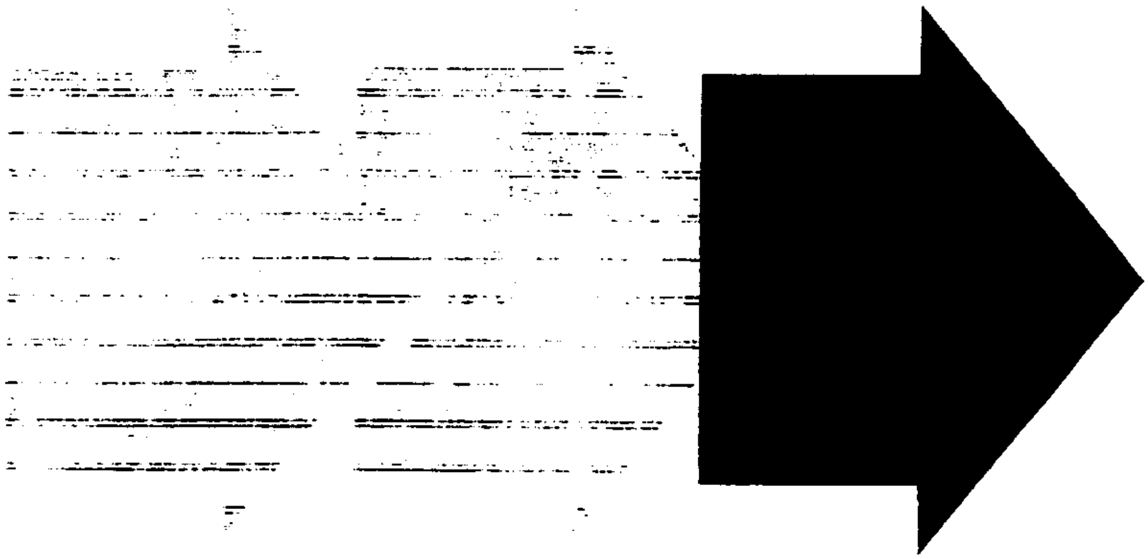
Cost Of Service, Credibility/Billing And *Program Offerings* Have The Most Impact On Overall Customer Satisfaction With Cable/Satellite TV Service, Followed By Equipment And Service Capabilities, Customer Service And Reception Quality.

Customer Satisfaction Index Weights: Cable/Satellite TV



The Third Step Involves *Deriving* Satisfaction Index Scores For Each Service Provider Using The Weights Established In The Regression Analysis.

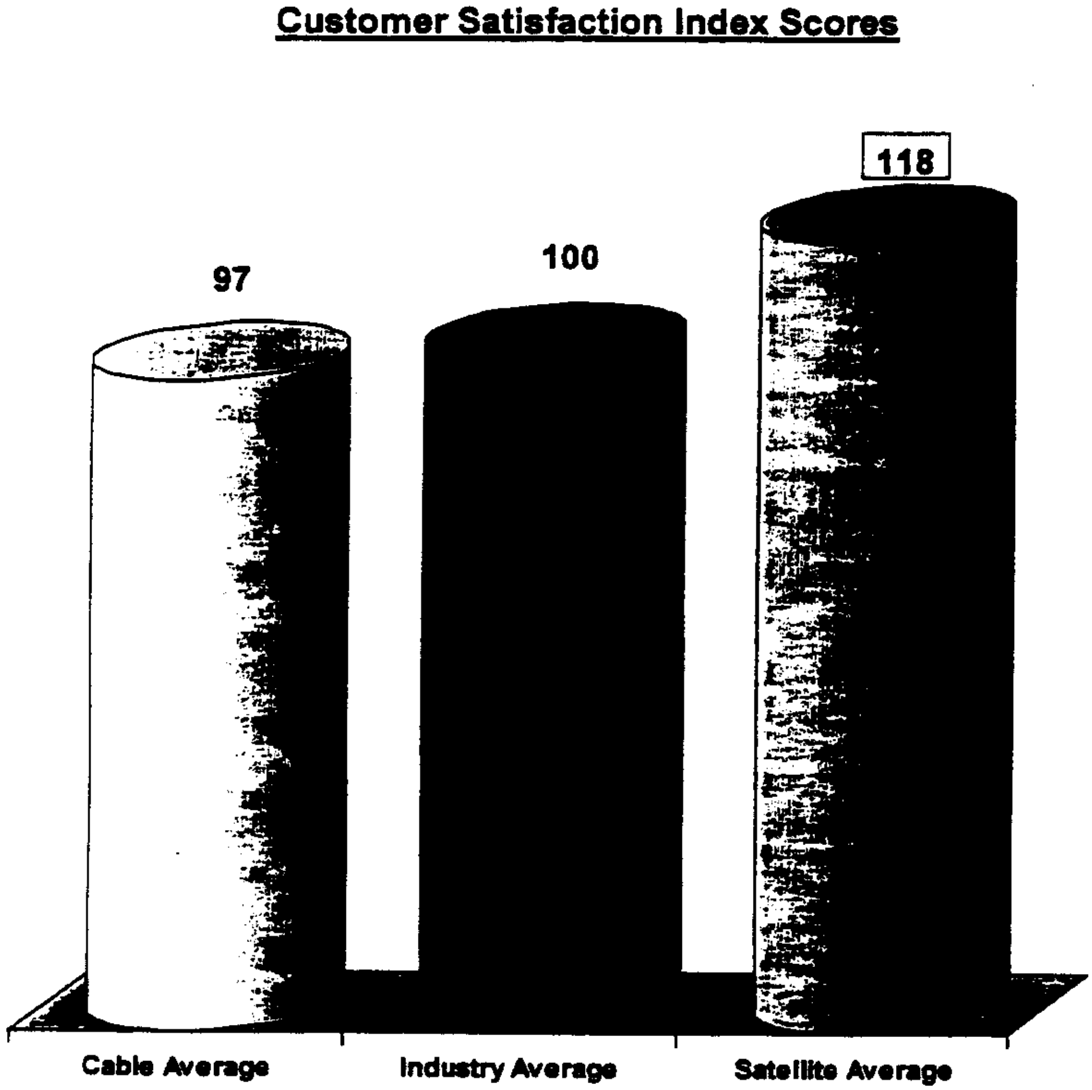


Identifies unique satisfaction dimensions and eliminates non-discriminating dimensions

Identifies importance based on implied weights of each unique dimension

Scores respondents based on weights and establishes an industry average

Satellite Users Have Much Higher Levels Of Satisfaction Overall, Than Do Cable Users.



= Statistically above industry average at 95% confidence level

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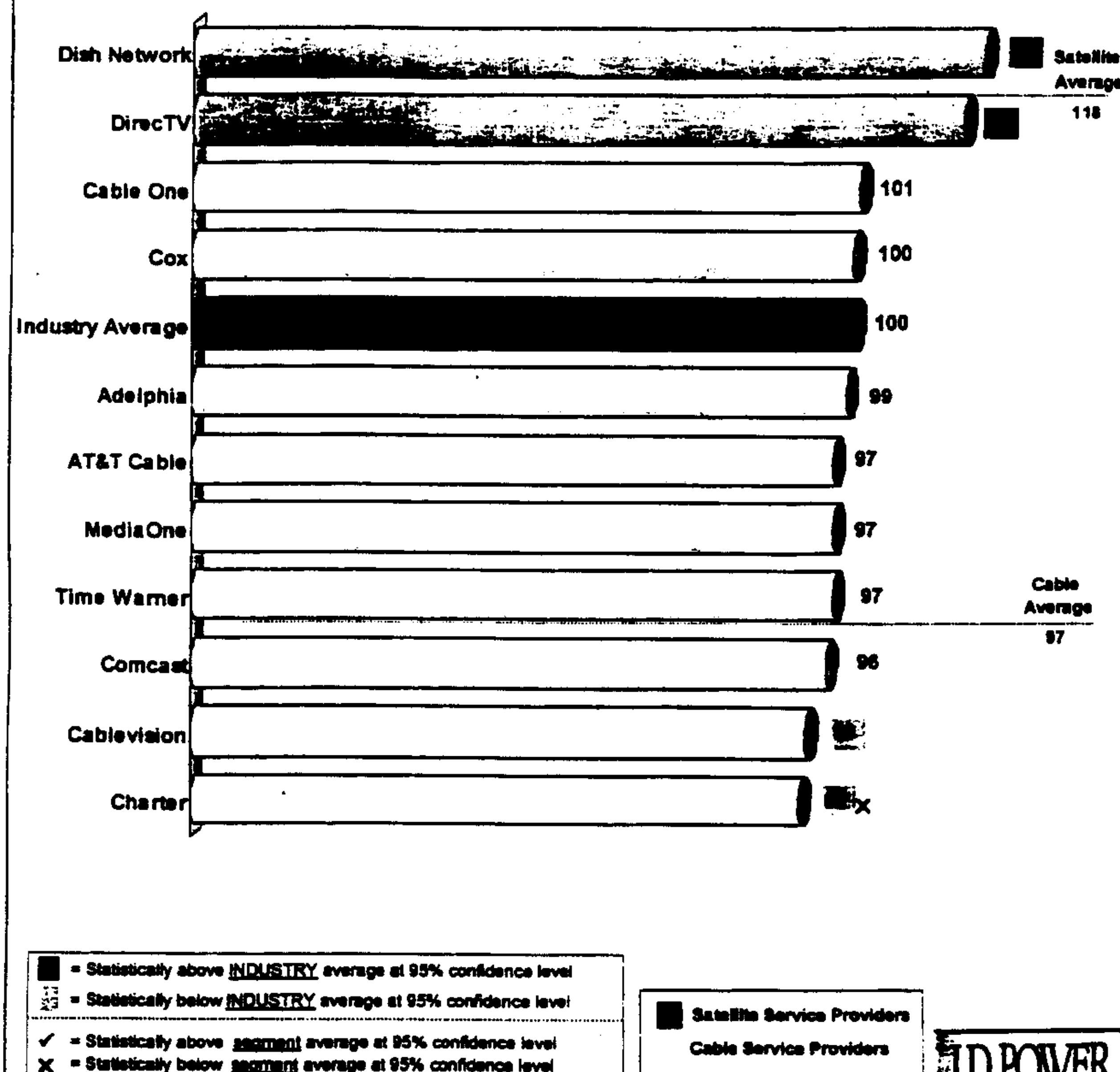
Source: 2000 JDP&A Cable/Satellite CSI Study

In The 2000 Cable And Satellite TV Industry Study, Dish Network Has The Highest Level Of Overall Customer Satisfaction. Among Cable Users, Cable One Scores The Highest Above The Cable Segment Average.

Customer Satisfaction Index Scores



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Cable/Satellite TV Satisfaction By Factor

* The major satellite companies have a significant competitive edge over the cable industry in overall customer satisfaction and within each of the key dimensions. Within the cable and satellite groups each company faces their own strengths and weaknesses.

* Among the satellite companies:
  - Dish Network leads the satellite industry in Overall Customer Satisfaction with strong showings in five of the six key drivers of satisfaction.

* Among the cable companies:
  - Cable One has a slight lead over the other cable companies in Overall Satisfaction, with strong scores in the Cost Of Service, Credibility/Billing, Program Offerings and Customer Service dimensions.
    - Cox outscores Cable One in the Equipment & Service Capabilities and Reception Quality, while tying with Cable One on the Credibility/Billing and Program Offering dimensions.
  - AT&T Cable, Time Warner and MediaOne perform at the middle of the cable industry competitive field, slightly behind Adelphia and slightly above Comcast.
  - Cablevision and Charter performs below the rest of the cable industry, mostly due to lower ratings on all aspects contributing to Overall Satisfaction.

Dish Network's Lead Over DirecTV Can Be Partially Attributed To Their Significantly Higher Score In Cost Of Service. Notably, Cable One And Cox Perform Above Or At The Cable/Satellite Industry Average Overall And On Five Out Of Six Drivers Of Satisfaction.

	Overall Satisfaction	Cost of Service	Credibility/ Billing	Program Offerings	Equipment & Service Capabilities	Customer Service	Reception Quality
Satellite Average	[illegible]	121	117	[illegible]	[illegible]	[illegible]	[illegible]
[redacted]							
Cable Average	97	[illegible]	97	[illegible]	[illegible]	[illegible]	[illegible]
Cable One	101	102 ✓	101	100	102	[illegible]	96
Cox	100	97	101	100	104 ✓	100	102 ✓
Adelphia	99	101 ✓	98	97	99	[illegible]	[illegible]
Time Warner	97	[illegible]	99	96	99	[illegible]	97
AT&T Cable	97	100	98	97	[illegible]	96	[illegible]
MediaOne	97	[illegible]	97	98	97	101	96
Comcast	96	[illegible]	96	[illegible]	98	101	[illegible]
Cablevision	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	97	[illegible]
Charter	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

■ = Statistically above INDUSTRY average at 95% confidence level
▒ = Statistically below INDUSTRY average at 95% confidence level

✓ = Statistically above segment average at 95% confidence level
✗ = Statistically below segment average at 95% confidence level

DETAILED FINDINGS

* Customer Satisfaction On A Factor Level

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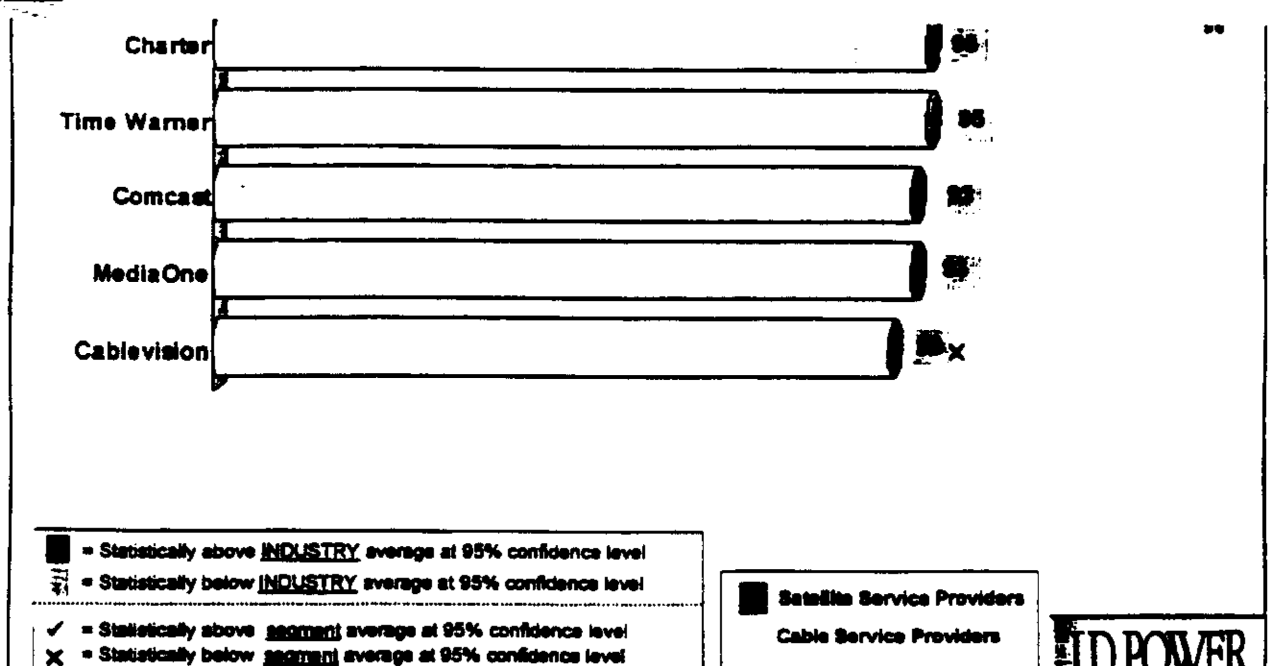
What Accounts For Differences In Customer Satisfaction At The Factor Level?

* Only carriers with significant differences in performance versus the Industry Average at the factor level are included in the evaluation at the attribute level

- Cost of Adding Additional Channels
- Initial Cost of Installation/Service
- Cost of Adding Service to Two or More TVs



Source: 2000 JDP&A Cable/Satellite CSI Study

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Dish Network's Significant Lead Over DirecTV In The *Cost Of Service* Factor Is Due In Large Part To A Significant Lead In The "Total Cost Of Monthly Service Attribute." In Contrast, Cable Providers Comcast, MediaOne And Cablevision All Score Significantly Lower Than The Industry Average On That Attribute.

+/- Difference of Cost of Service Attribute Scores Vs. The Industry Average

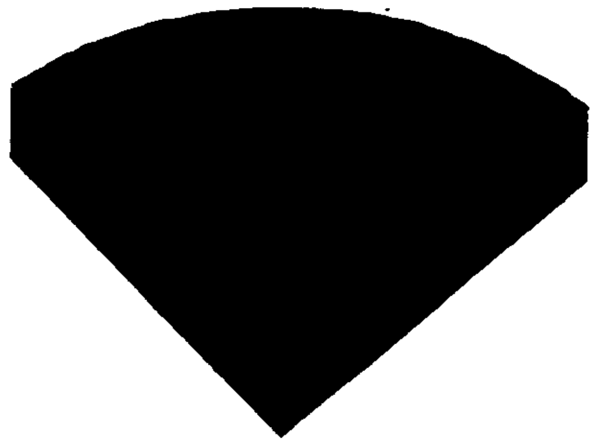
[redacted]

Dish Network	+11✓	+7✓	+6✓	+3✓	0	+27✓
DirecTV	+6 ✓	+6✓	+4✓	+2	0	+18✓
Charter	-2	-1	-1	-1	0	-5✕
Time Warner	-2	-1	-1	-1	0	-5✕
Comcast	-3✕	-1	-2	-1	0	-7✕
MediaOne	-4✕	-1	-1	-1	0	-7✕
Cablevision	-4✕	-2	-2	-1	-1	-10✕

✓ = Statistically above INDUSTRY average at 95% confidence level

✕ = Statistically below INDUSTRY average at 95% confidence level

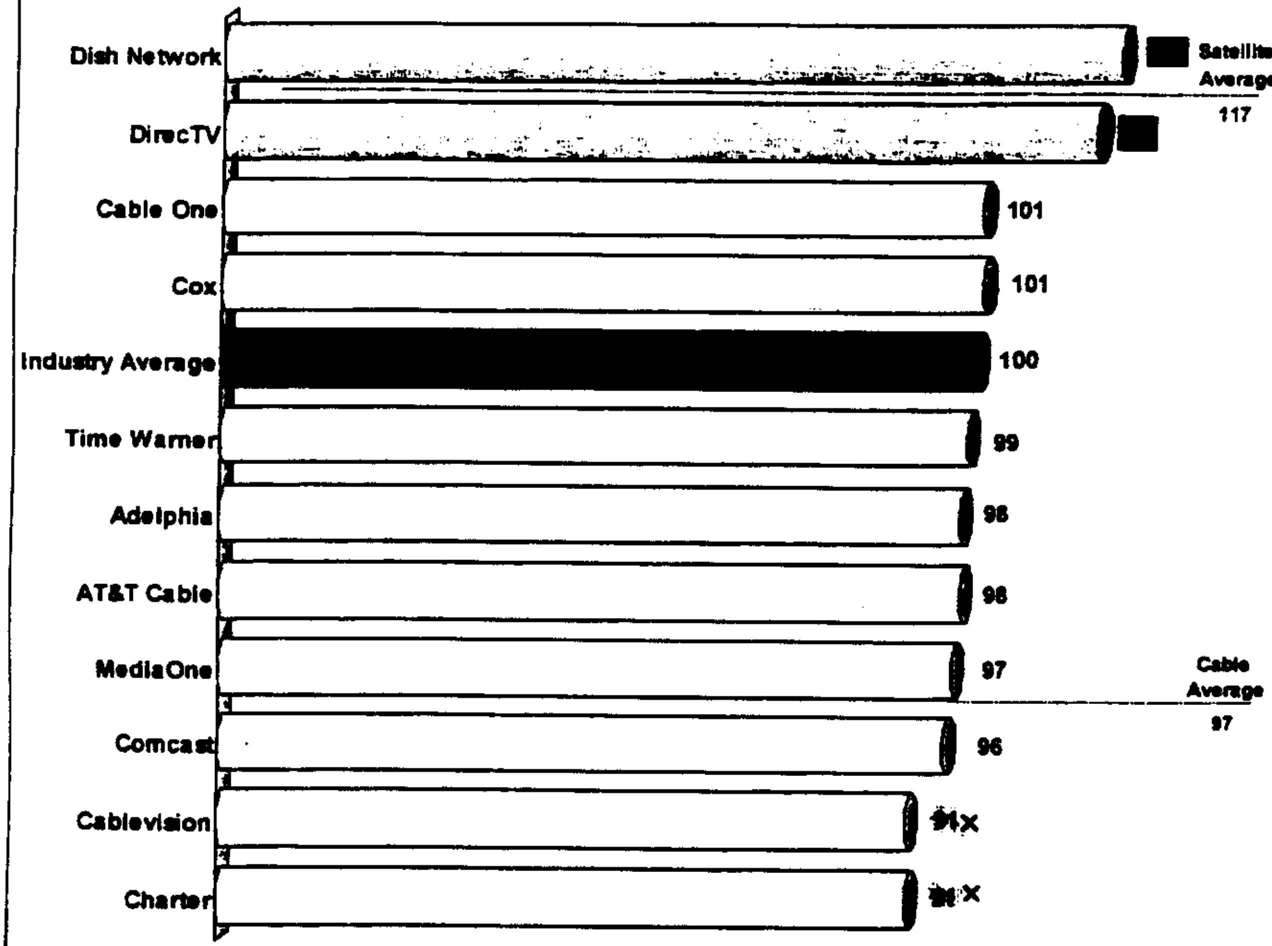
Credibility/Billing



- Is a Technical Innovator in the TV Industry
- Company's Reputation
- Company's Honesty with No Hidden Charges or Gimmicks
- Active In Supporting Activities In Community
- Keeps You Informed About New Services/Promotions
- Timeliness in Making Adjustments to Your Bill
- Ease Of Understanding Company Correspondence, Such As Bill Inserts
- Availability Of A Variety Of Payment Methods
- Company Stands Behind Service They Sell
- Accuracy of Your Monthly Bill
- Ease of Understanding Your Monthly Bill

Dish Network And DirecTV Perform Significantly Above The Industry Average In *Credibility/Billing*. Cable Providers Cablevision And Charter Perform Significantly Below Both The Industry And Cable Segment Averages.

Customer Satisfaction Index For *"Credibility/Billing"* Factor



■ = Statistically above INDUSTRY average at 95% confidence level
= Statistically below INDUSTRY average at 95% confidence level
✓ = Statistically above segment average at 95% confidence level
✗ = Statistically below segment average at 95% confidence level

■ Satellite Service Providers
Cable Service Providers

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Performance On The Three Key Attributes Impacting Satisfaction With *Credibility/Billing* Accounts For The Satellite Providers' Lead Over Cable Companies On This Dimension.

+/- Difference of Credibility/Billing Attribute Scores Vs. The Industry Average

	Technical Innovator	*Company's Reputation*	*Company's Honesty*									*Total*
Dish Network	+5 ✓	+4 ✓	+3 ✓	-2	+2	+1	+2	+2	+1	+1	0	+19 ✓
DirecTV	+4 ✓	+4 ✓	+3 ✓	-3 ✗	+2	+1	+2	+1	+1	+1	0	+16 ✓
Cablevision	-3 ✗	-3 ✗	-1	0	0	0	0	0	-1	0	-1	-8 ✗
Charter	-3 ✗	-3 ✗	-1	0	-1	0	0	0	-1	0	0	-9 ✗

Technical Innovation And Company Reputation Contribute Heavily Toward Cablevision And Charter's Poor Performance In This Area.

✓ = Statistically above INDUSTRY average at 95% confidence level

✗ = Statistically below INDUSTRY average at 95% confidence level

Source: 2000 JDP&A Cable/Satellite CSI Study

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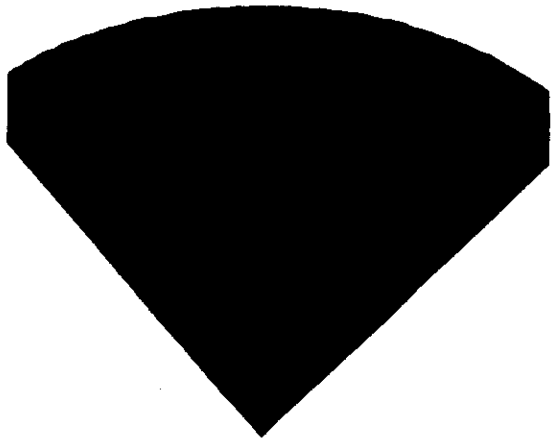
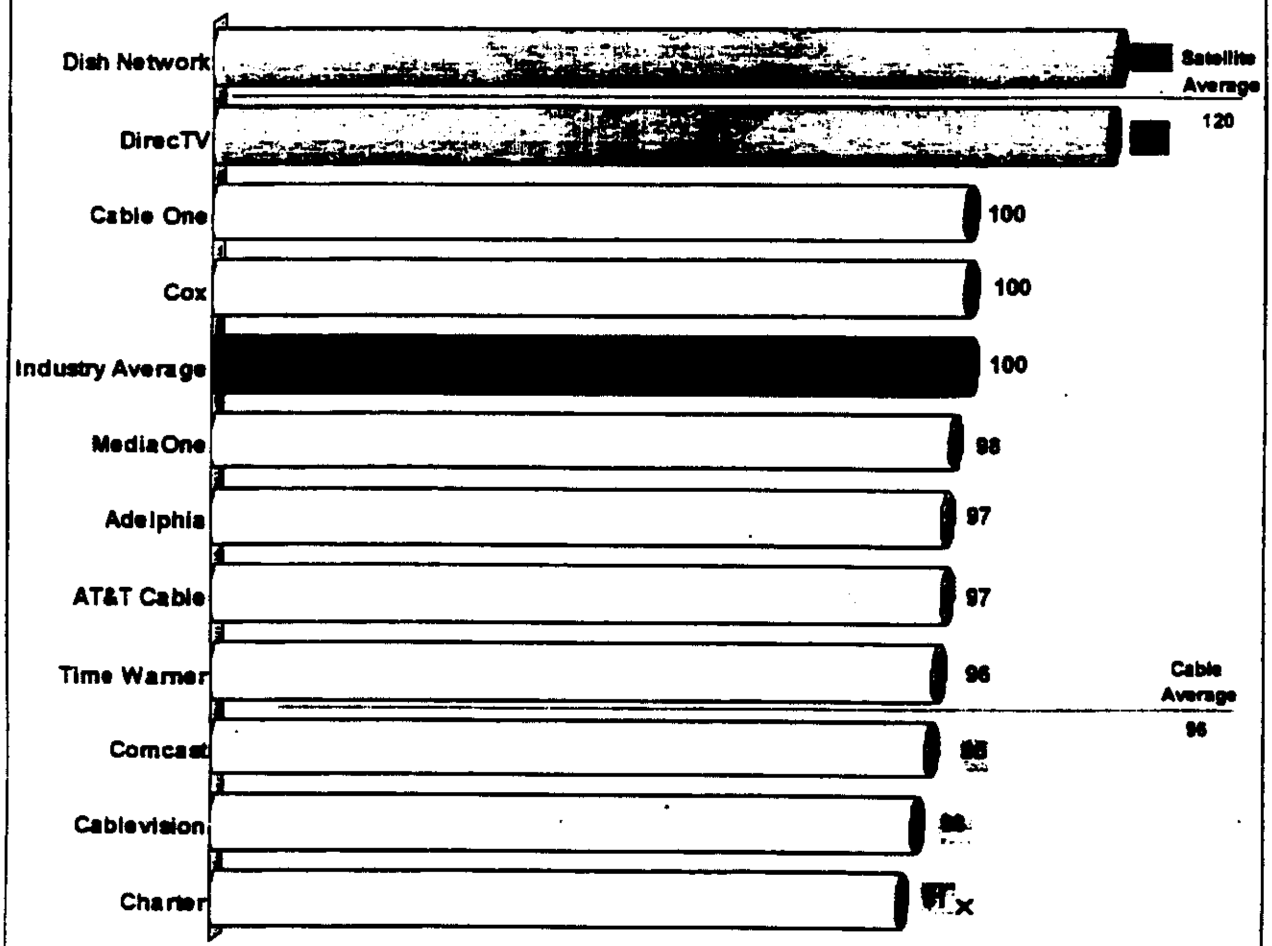
Program Offerings



- ✧ Offers Channels You Like As A Part of "Basic"
- ✧ Number of Channels Available
- ✧ Offers Special Discounts on Select Channels
- ✧ Makes It Easy to Find Something to Watch
- ✧ Provides A Variety of Programming Packages
- ✧ Ease of Ordering "Pay-Per-View" Programs
- ✧ Provides Local Programming

Dish Network And DirecTV Dominate The *Program Offerings* Dimension, Scoring Significantly Above Their Next Closest Competitor. Charter Performs Below Both The Industry And Cable Segment Averages.

Customer Satisfaction Index For *"Program Offerings"* Factor



■ = Statistically above INDUSTRY average at 95% confidence level
▢ = Statistically below INDUSTRY average at 95% confidence level
✓ = Statistically above segment average at 95% confidence level
X = Statistically below segment average at 95% confidence level

■ Satellite Service Providers
Cable Service Providers

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Dish Network Performs Well Above The Industry Average On Six Of The Seven Areas Contributing To Satisfaction With *Programming Offerings*, Especially "Offers Channels You Like As Part Of Basic."

+/- Difference of <u>Program Offerings</u> Attribute Scores Vs. The Industry Average

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Total 100
Dish Network	+5 ✓	+5 ✓	+3 ✓	+3 ✓	+3 ✓	+3 ✓	-1	+21 ✓
DirecTV	+3 ✓	+5 ✓	+5 ✓	+2	+2	+3 ✓	-1	+19 ✓
Comcast	0	-1	-1	-1	-1	-1	0	-6 X
Cablevision	-1	-2	-1	-1	-1	-1	0	-7 X
Charter	-1	-2	-1	-1	-2	-2	0	-9 X

Comcast, Cablevision And Charter's Low Score On *Program Offerings* Is Cumulative Across All Of The Attributes.

✓ = Statistically above <u>INDUSTRY</u> average at 95% confidence level

X = Statistically below <u>INDUSTRY</u> average at 95% confidence level

Source: 2000 JDP&A Cable/Satellite CSI Study

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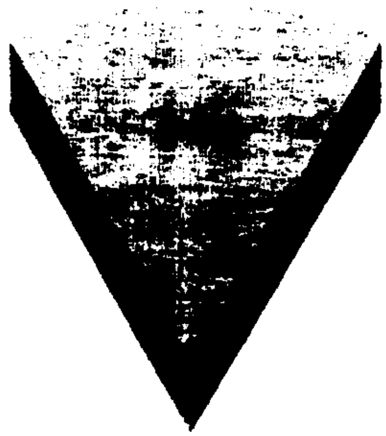
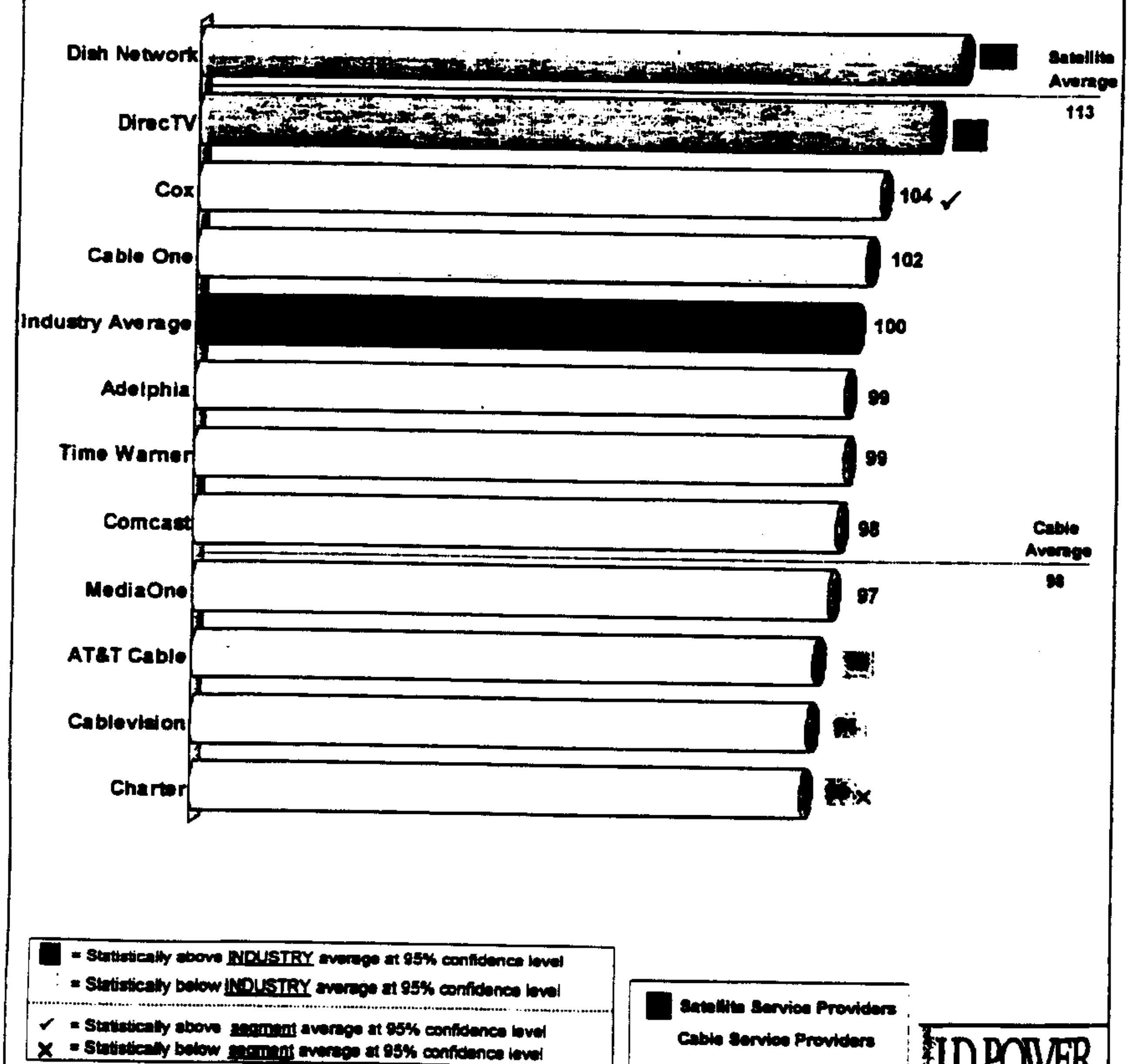
Equipment & Service Capabilities



- Offers The Services You Want In Your Area
- Keeps Service Outages to a Minimum
- Ability to Restore Service After Temporary Outages
- Equipment that Is Easy to Operate
- Provides Replacement or Loaner Equipment

Dish Network Leads The Competitive Pack In *Equipment & Service Capabilities*, Followed By The Other Satellite Providers. Cox Cable Scores Significantly Above The Cable Segment Average.

Customer Satisfaction Index For *"Equipment & Service Capabilities"* Factor



Dish Network's Solid Performance In Four Of The Five Attributes That Make Up *Equipment & Services Capabilities* Contribute To Its Lead In This Area.

+/- Difference of Equipment & Service Capabilities Attribute Scores Vs. The Industry Average

	Offers Services You Want In Area	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Industry Average	[illegible]				[illegible]	100
Dish Network	+2	+5 ✓	+5 ✓	+4 ✓	0	+16 ✓
DirecTV	0	+5 ✓	+5 ✓	+2	0	+12 ✓
AT&T Cable	-2	-2	-1	-1	+1	-5 ✕
Cablevision	-2	-2	0	-1	-1	-6 ✕
Charter	-2	-3 ✕	-1	0	-1	-7 ✕

Charter's Main Reason For Scoring Below The Industry Average Is Due To "Keeps Service Outages To A Minimum."

✓ = Statistically above INDUSTRY average at 95% confidence level

✕ = Statistically below INDUSTRY average at 95% confidence level

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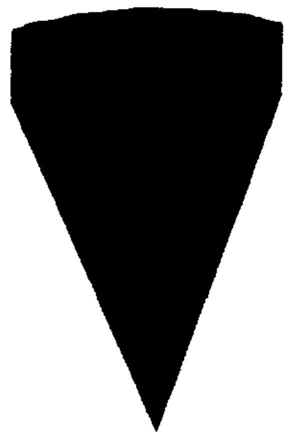
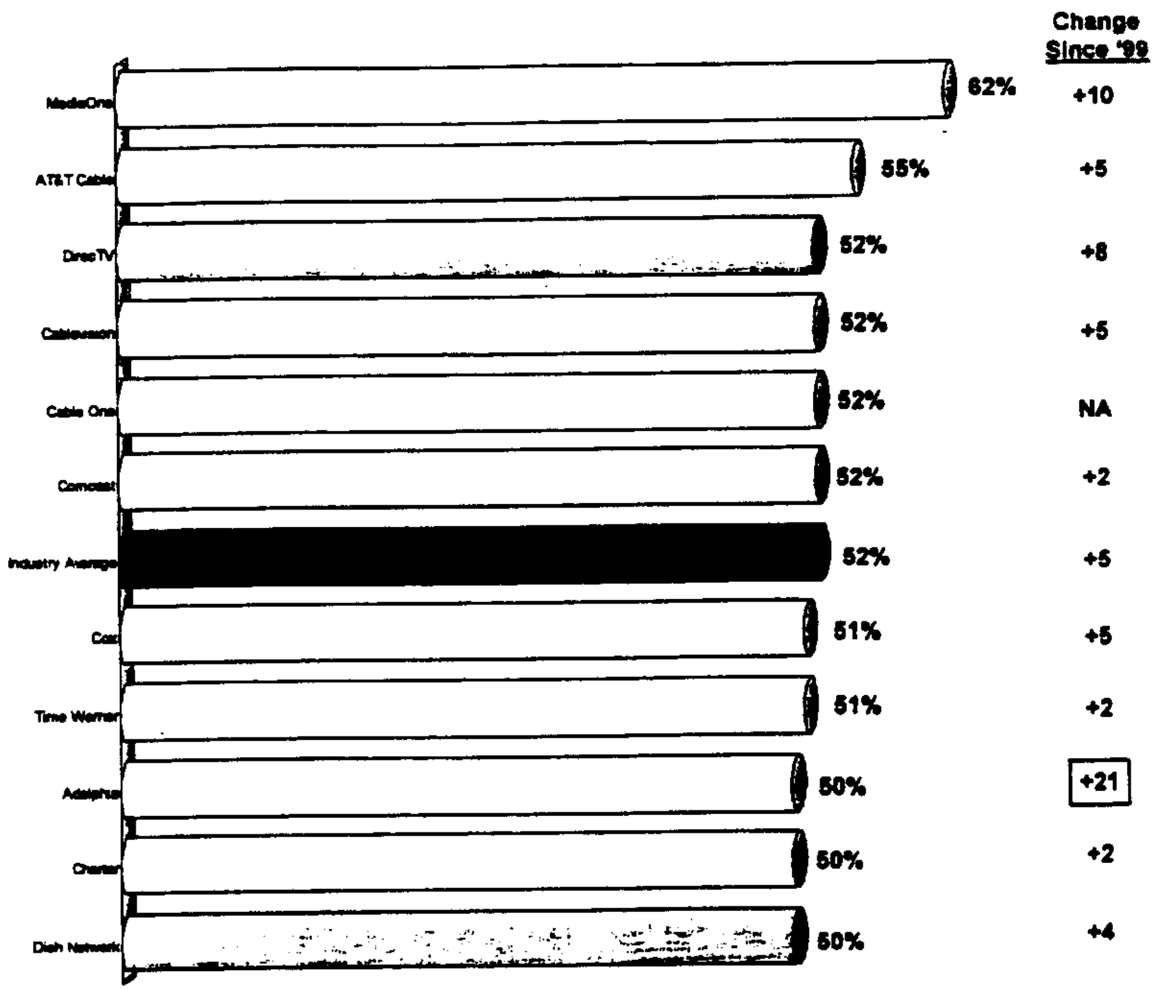
Customer Service



- Has Courteous Customer Service Reps
- Getting Through to Customer Service Without Being Put on Hold/ Transferred
- Has Knowledgeable Customer Service Reps
- Ability to Resolve Service Issues In A Timely Manner
- Promptly Makes Changes To Your Service When You Request Them
- Thoroughness Of Information Provided
- Customer Service Reps Are Responsive To Questions
- Has User-Friendy Automated Response System
- Convenience of Customer Service Hours
- Time it Takes to Reach a Customer Service Representative

More Than Half Of All Cable/Satellite Customers Have Had A Question Or Problem With Their Service In The Past Year, With MediaOne Having The Highest Incidence.

% Households With Problem Or Question With Service In <12 Months



Adelphia Has Seen A Significant Rise In The Number Of Problems/Questions Since 1999.

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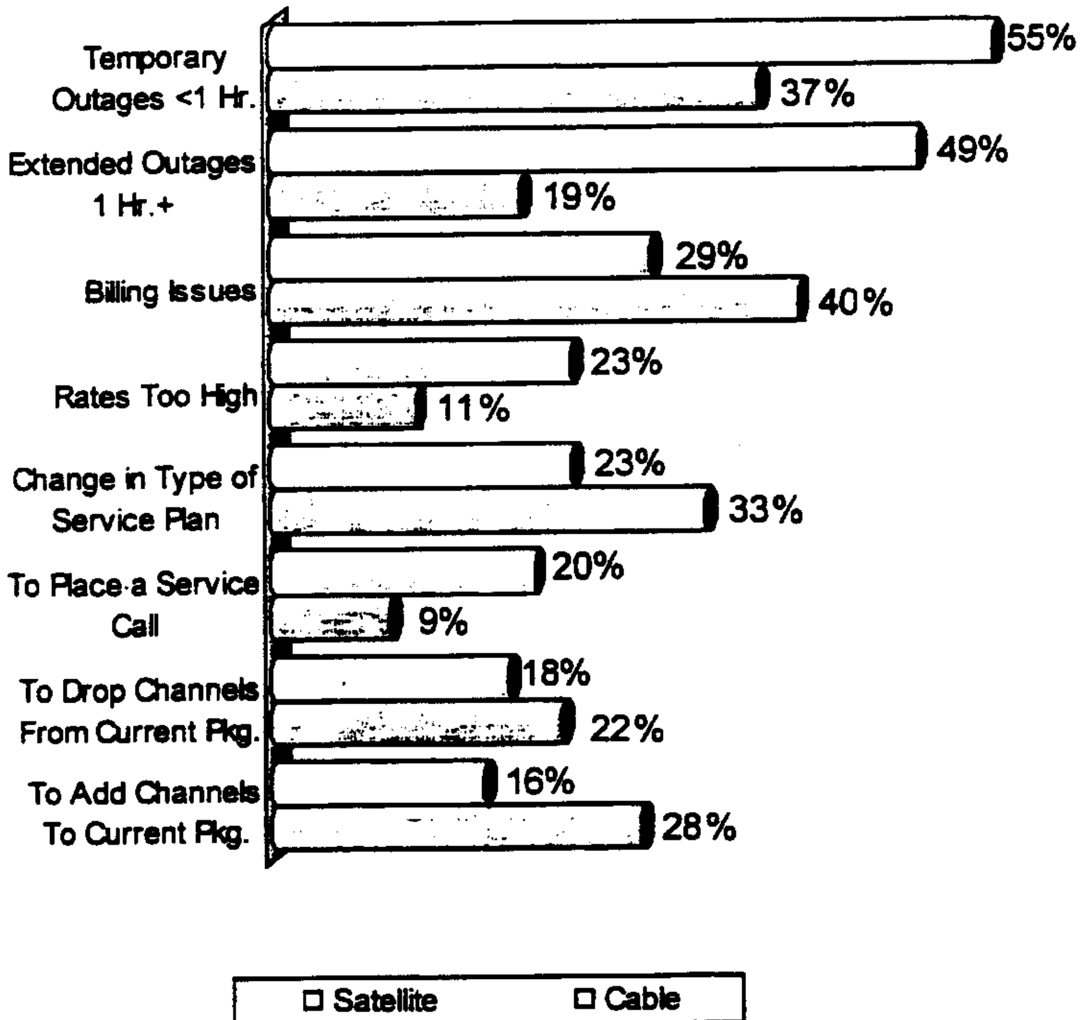
Source: 2000 JDP&A Cable/Satellite CSI Study

"Outages" Top The List Of Reasons Why Cable Subscribers Are Contacting Their Cable Customer Service Department. By Contrast, Satellite Customers Call More With "Billing Issues."

Reasons For Contacting Cable/Satellite Provider's Customer Service Department*: (Among Those Who Had A Question or Problem)



* Multiple responses accepted

Source: 2000 JDP&A Cable/Satellite CSI Study

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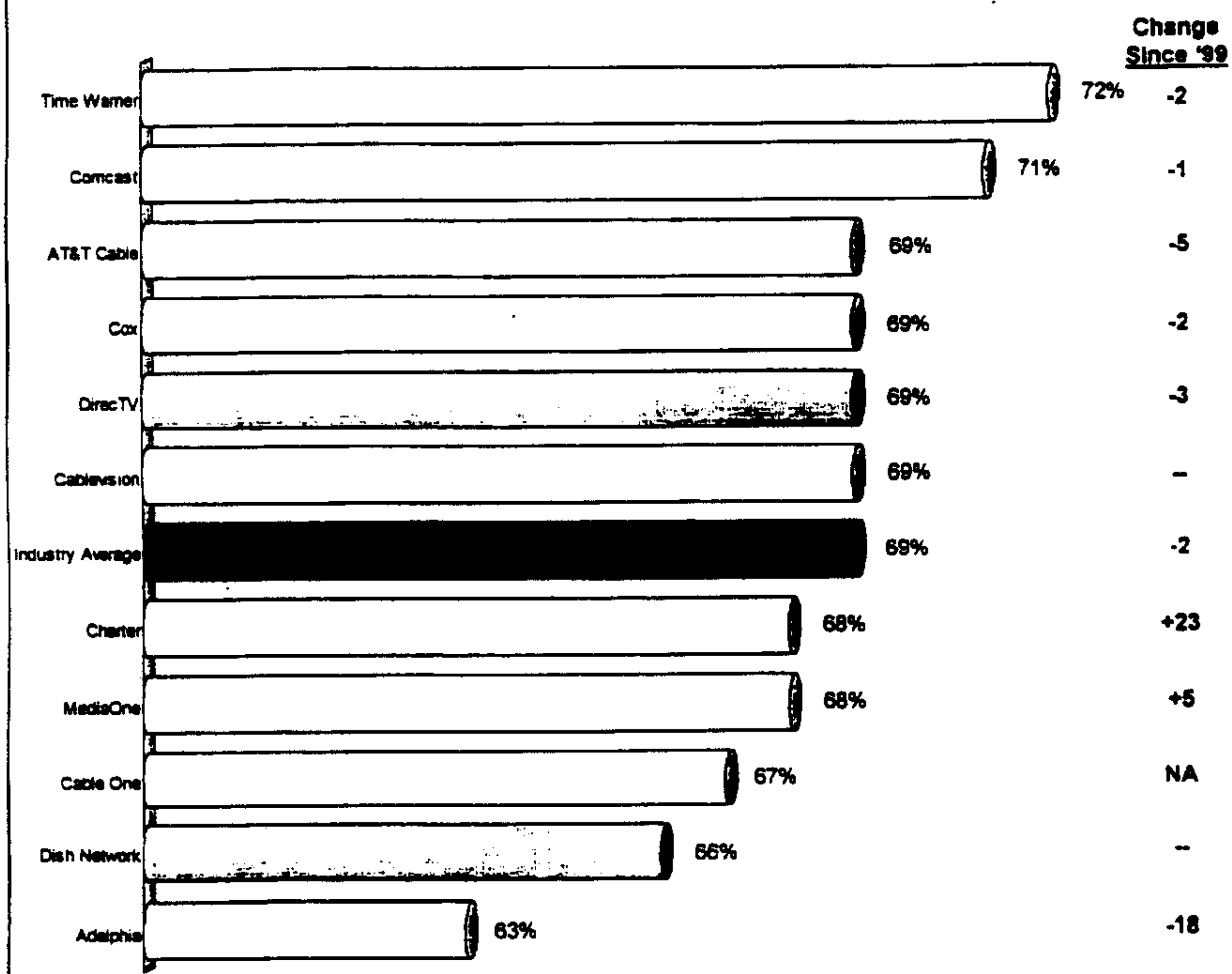
Almost Three Quarters Of Subscribers Report The First Person Contacted At Time Warner As Being Able To Resolve The Problem. This Is In Contrast To Only Two Thirds Of Adelphia Customers Reporting Their Problems Resolved.

Most Recent Problem/Question Resolved By The First Person Contacted*



* Contacted carrier about recent question or problem

Source: 2000 JDP&A Cable/Satellite CSI Study

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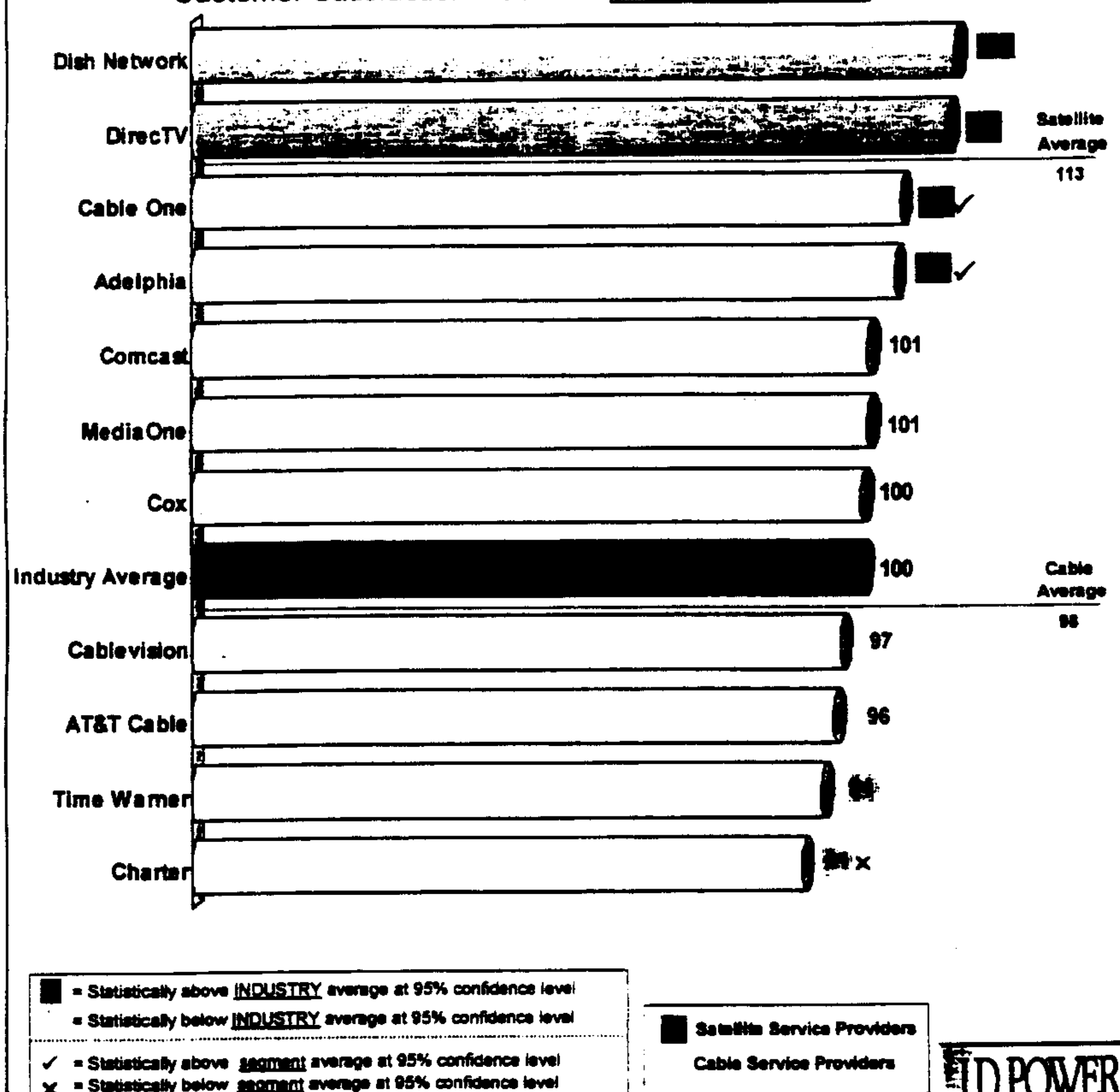
Dish Network Scores Above All Other Competitors On *Customer Service* Satisfaction. Among Cable Providers, Both Cable One And Adelphia Score Above The Industry Average.

Customer Satisfaction Index For "*Customer Service*" Factor



Source: 2000 JDP&A Cable/Satellite CSI Study

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Cumulatively, Dish Network And DirecTV Score Slightly Above The Industry Average On All 10 Aspects Of Customer Service Satisfaction. Cable One Performs Strongly On "Getting Through Without Being Put On Hold."

+/- Difference of Customer Service Attribute Scores Vs. The Industry Average

	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Total
Industry Average	10	9	10	[illegible]	10	10	[illegible]	[illegible]	10	10	100
Dish Network	+2	0	+1	+2	+2	+2	+2	+2	+2	-1	+14✓
DirecTV	+1	+1	+1	+2	+2	+1	+1	+1	+2	+1	+13✓
Cable One	+1	+2	0	+1	0	0	+1	0	0	+1	+6✓
Adelphia	+1	+1	0	0	0	0	+1	+1	0	+1	+5✓
Time Warner	-1	0	-1	-1	0	-1	-1	-1	0	0	-4✗
Charter	-1	0	-1	-1	-1	-1	-1	-1	-2	0	-9✗

✓ = Statistically above INDUSTRY average at 95% confidence level

✗ = Statistically below INDUSTRY average at 95% confidence level

Source: 2000 JDP&A Cable/Satellite CSI Study

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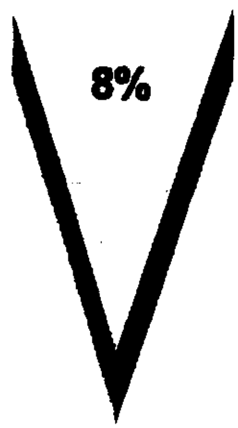
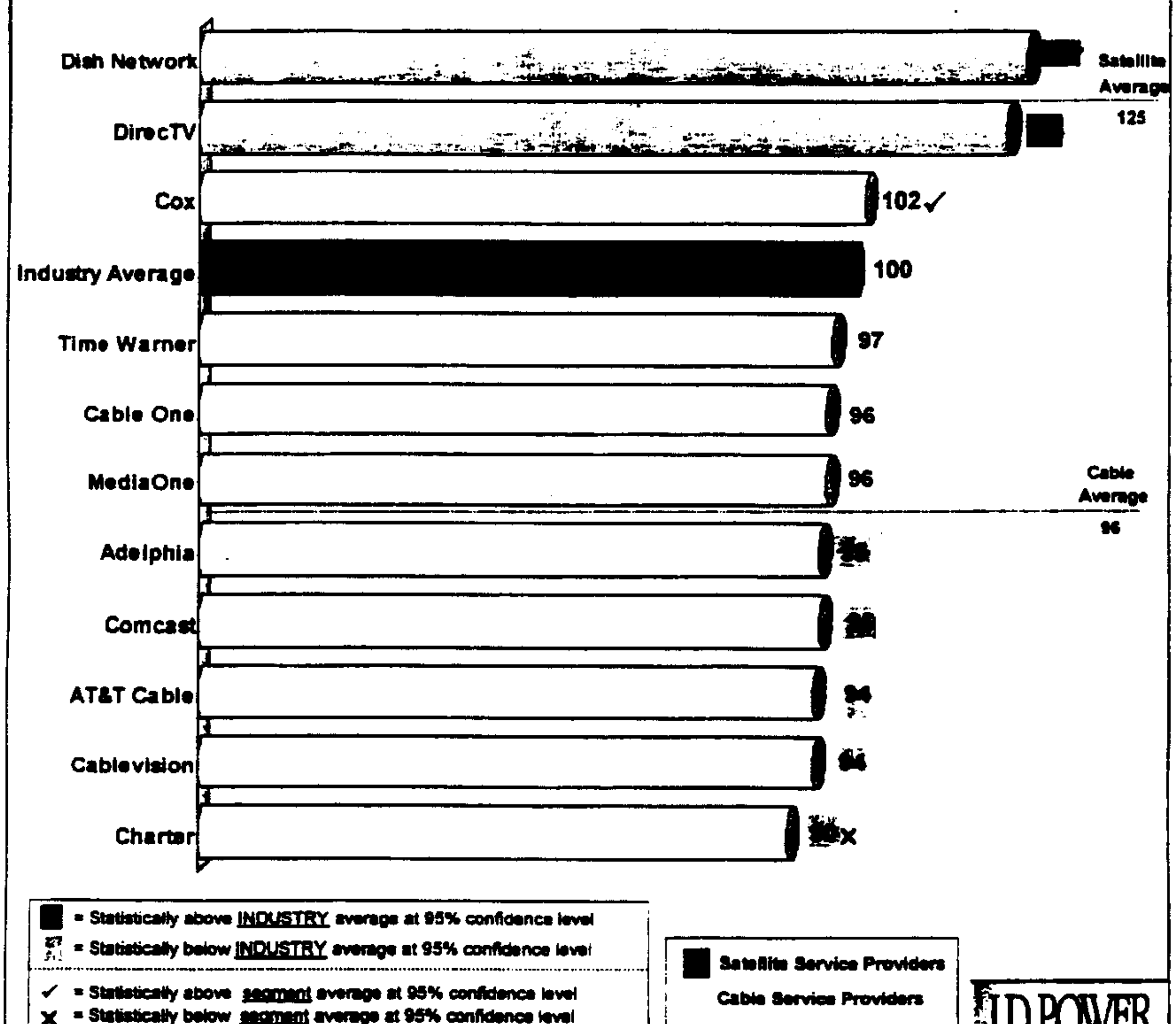
Reception Quality



- Consistently Delivers Clear Reception
- Clarity of Reception

Dish Network And DirecTV Score Significantly Above The Rest Of The Competitive Pack In *Reception Quality.* Cox Is The Only Cable Provider That Ranks Above The Industry Average In This Dimension.

Customer Satisfaction Index For "Reception Quality" Factor



A Slight Advantage In "Consistently Delivers Clear Reception" Gives Dish Network Its Edge Over DirecTV In *Reception Quality*.

+/- Difference of <u>Reception Quality</u> Attribute Scores Vs. The Industry Average

[illegible]	[illegible]	[illegible]	[illegible]
[illegible]			100
Dish Network	+19 ✓	+8 ✓	+27 ✓
DirecTV	+17 ✓	+7 ✓	+24 ✓
Adelphia	-3 ✗	-2	-5 ✗
Comcast	-3 ✗	-2	-5 ✗
AT&T Cable	-4 ✗	-2	-6 ✗
Cablevision	-4 ✗	-2	-6 ✗
Charter	-7 ✗	-3 ✗	-10 ✗

Adelphia, Comcast, AT&T Cable And Cablevision Are All Hurt By Poor Ratings In "Consistently Delivers Clear Reception". Charter Scores Significantly Lower Than Any Of The Other Cable Companies On This Attribute And Performs Significantly Below The Industry Average In "Clarity Of Reception."

✓ = Statistically above <u>INDUSTRY</u> average at 95% confidence level

✗ = Statistically below <u>INDUSTRY</u> average at 95% confidence level

J.D. POWER AND ASSOCIATES

Source: 2000 JDP&A Cable/Satellite CSI Study

DETAILED FINDINGS

* Digital Vs. Analog

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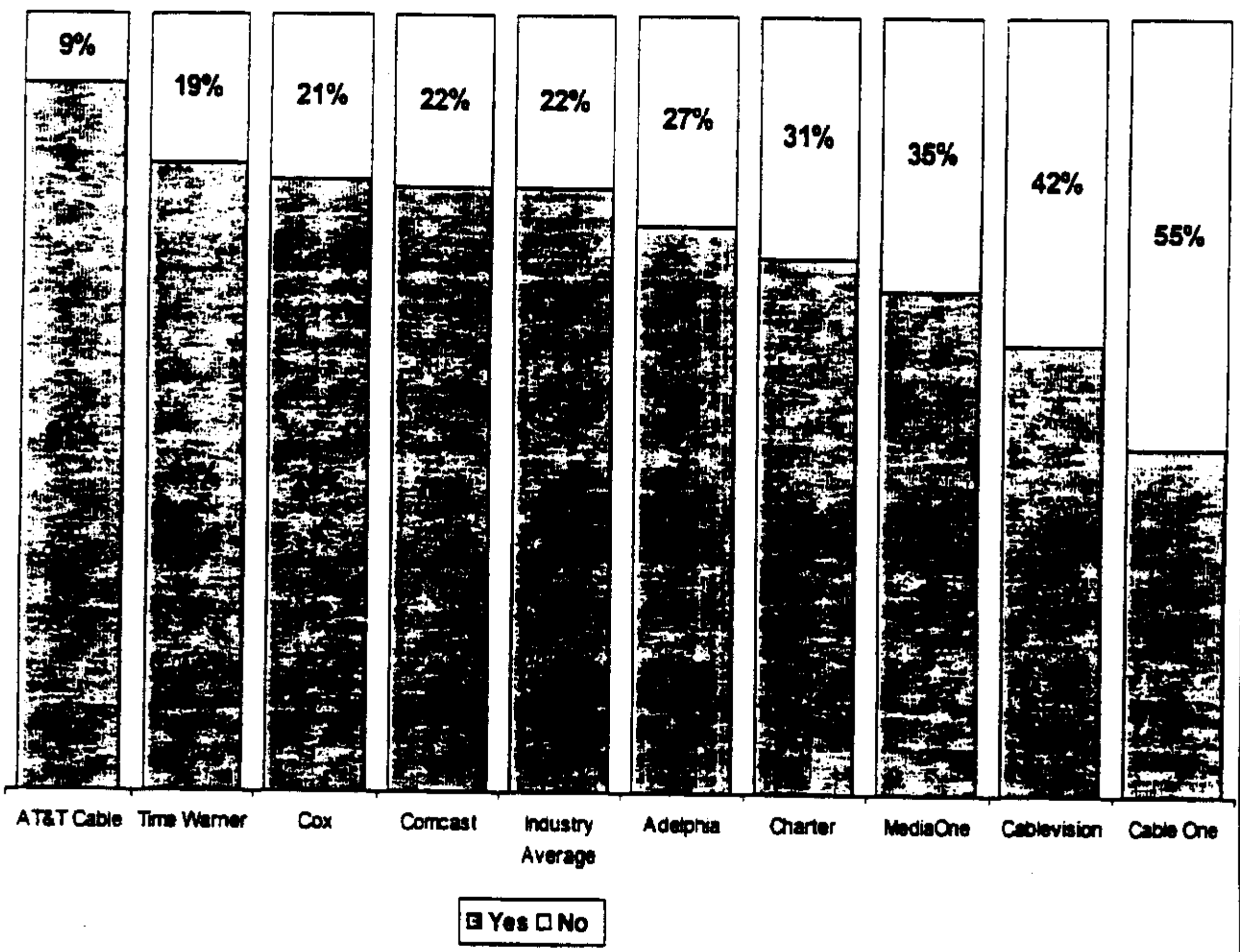
AT&T Cable Leads The Industry In Awareness Of The Availability Of Digital Service. In Contrast, Cable One Trails The Competitive Pack By A Large Margin.

% Of HH's Who Report Their Cable Provider Offers Digital Service:



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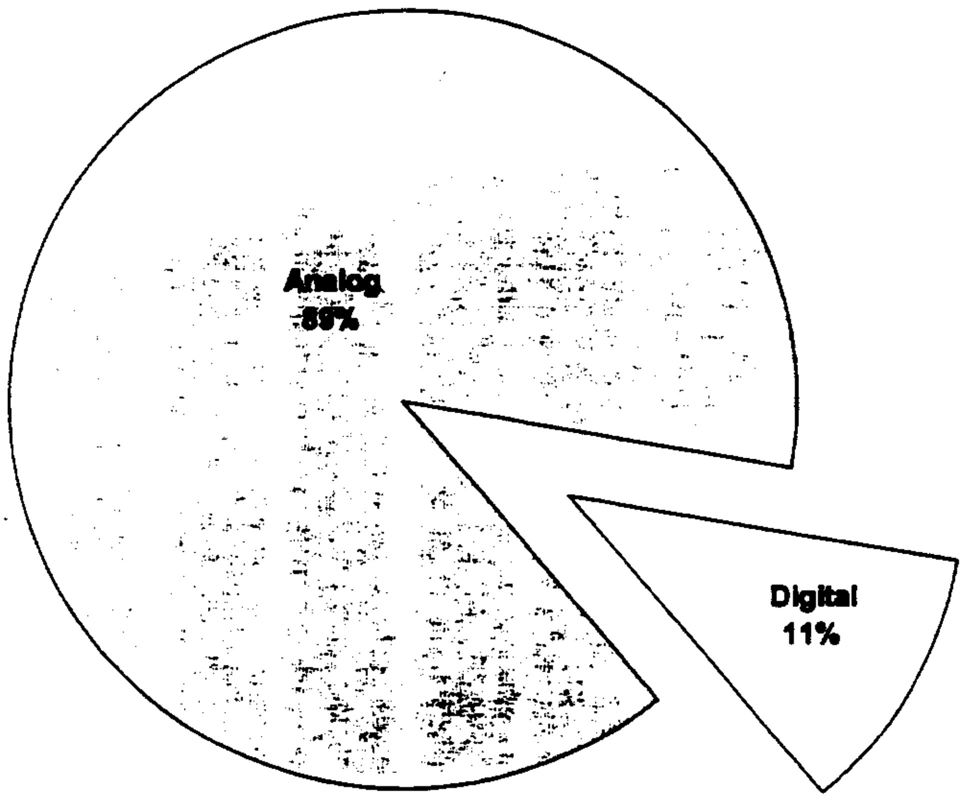
Source: 2000 JDP&A Cable/Satellite CSI Study

One In Ten Cable Customers Report Having Digital Service.

% Of Cable Households Who Report Subscribing To Digital Service::



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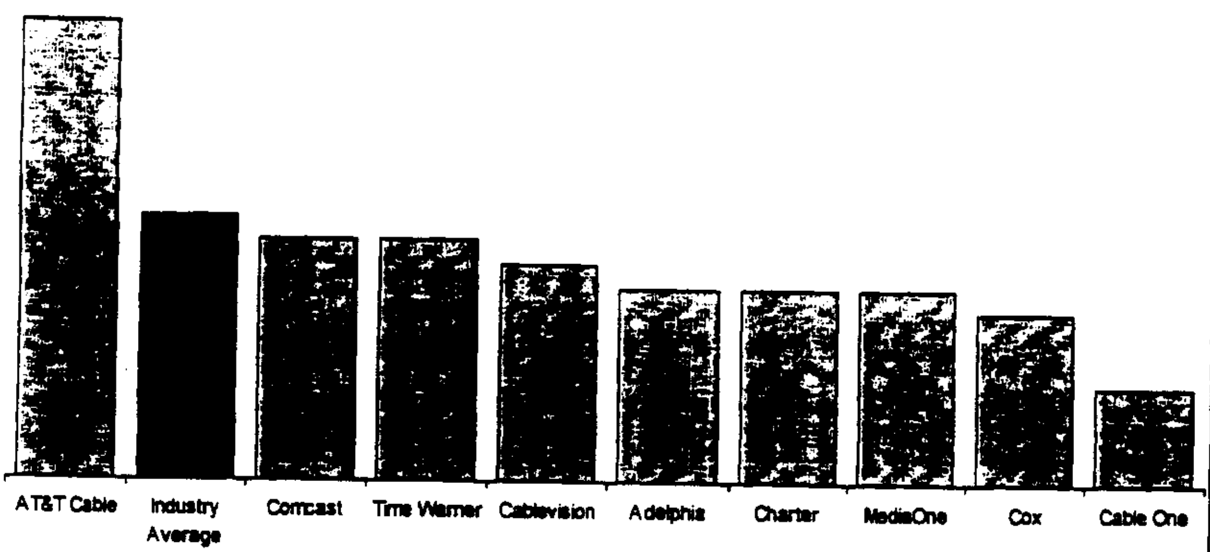
AT&T's Subscribers Report The Highest Incidence Of Digital Cable, Almost Twenty Percent. In Contrast, Only One In Twenty Cable One Subscribers Report Having Digital Service.

% HH's That Subscribe To Digital Service:



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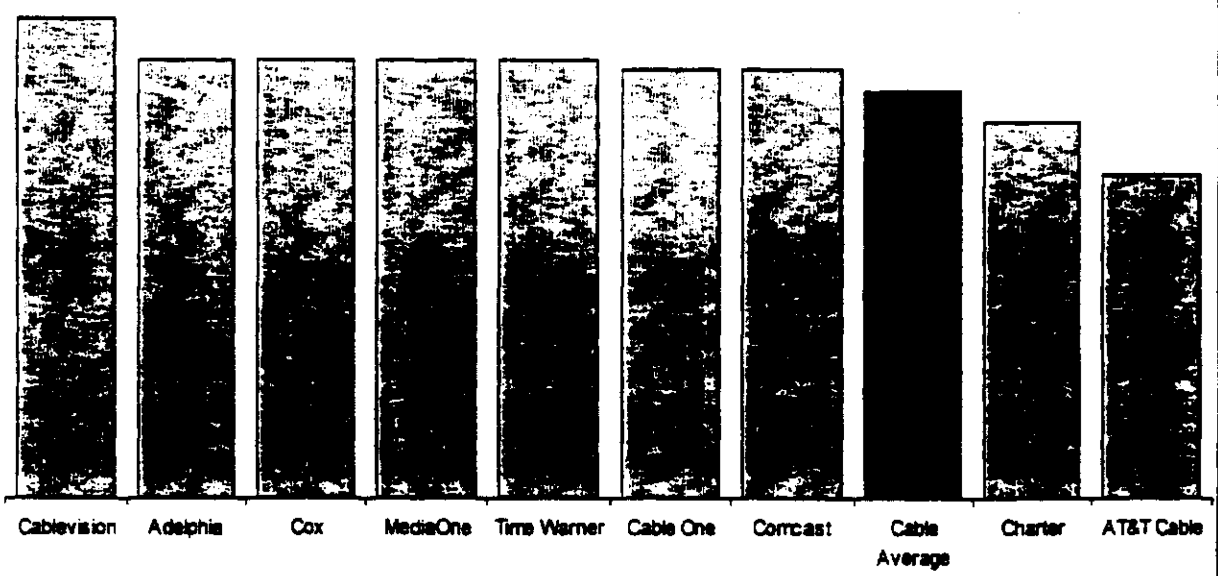
On Average, Four Out Of Ten Households Are Considering Switching To Digital Service In The Next Year. Cablevision Has The Highest Incidence Of Potential Switchers While AT&T Cable Has The Lowest.

% "Definitely/Probably/Might Change" To Digital Service Among Households That Do Not Already Subscribe To Digital:



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Compared To Analog Users, Digital Users Are Much More Satisfied Overall With Their Cable Service. Digital Users Rank Significantly Higher In Five Of The Six Dimensions That Impact Customer Satisfaction, Especially In *Program Offerings*.

Digital Vs. Analog Satisfaction Index

	Analog	Digital	*Difference*
OVERALL	96	106	*+10*
Cost of Service	*95*	*103*	+8
Credibility/Billing	*97*	*107*	+10
Program Offerings	*94*	*111*	+17
Equipment & Service Capabilities	*97*	*106*	+9
Customer Service	*98*	*102*	+4
Reception Quality	*94*	*102*	+8

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Digital's Advantage In The *Program Offerings* Dimension Can Be Attributed To Strong Performances In Almost All Of The Related Attributes.

+/- Difference of Program Offerings Attribute Scores: Digital Vs. Analog

	Analog	Digital	Difference
Total	111	94	+17✓
Offers channels you like as part of "basic"	26	22	+4 ✓
Number of channels available	21	18	+3 ✓
Offers special discounts	20	17	+3 ✓
Easy to find something to watch	17	14	+3 ✓
Provides a variety of programming	14	12	+2
Ease of ordering "Pay-Per-View"	12	10	+2
Provides Local Programming	1	1	0

✓ = Statistically above Analog at 95% confidence level

X = Statistically below Analog at 95% confidence level

Source: 2000 JDP&A Cable/Satellite CSI Study

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Analog Service, It Still Falls Significantly Below The Satisfaction Levels Reached By Satellite Providers Across All Dimensions.

Digital Vs. Satellite Satisfaction Index

	Satellite	Digital	Difference
OVERALL	118	106	-12×
Cost of Service	*121*	*103*	-18×
Credibility/Billing	*117*	*107*	-10×
Program Offerings	*120*	*111*	-9 ×
Equipment & Service Capabilities	*113*	*106*	-7 ×
Customer Service	*113*	*102*	-11×
Reception Quality	*125*	*102*	-23×

✓ = Statistically above Satellite at 95% confidence level

× = Statistically below Satellite at 95% confidence level

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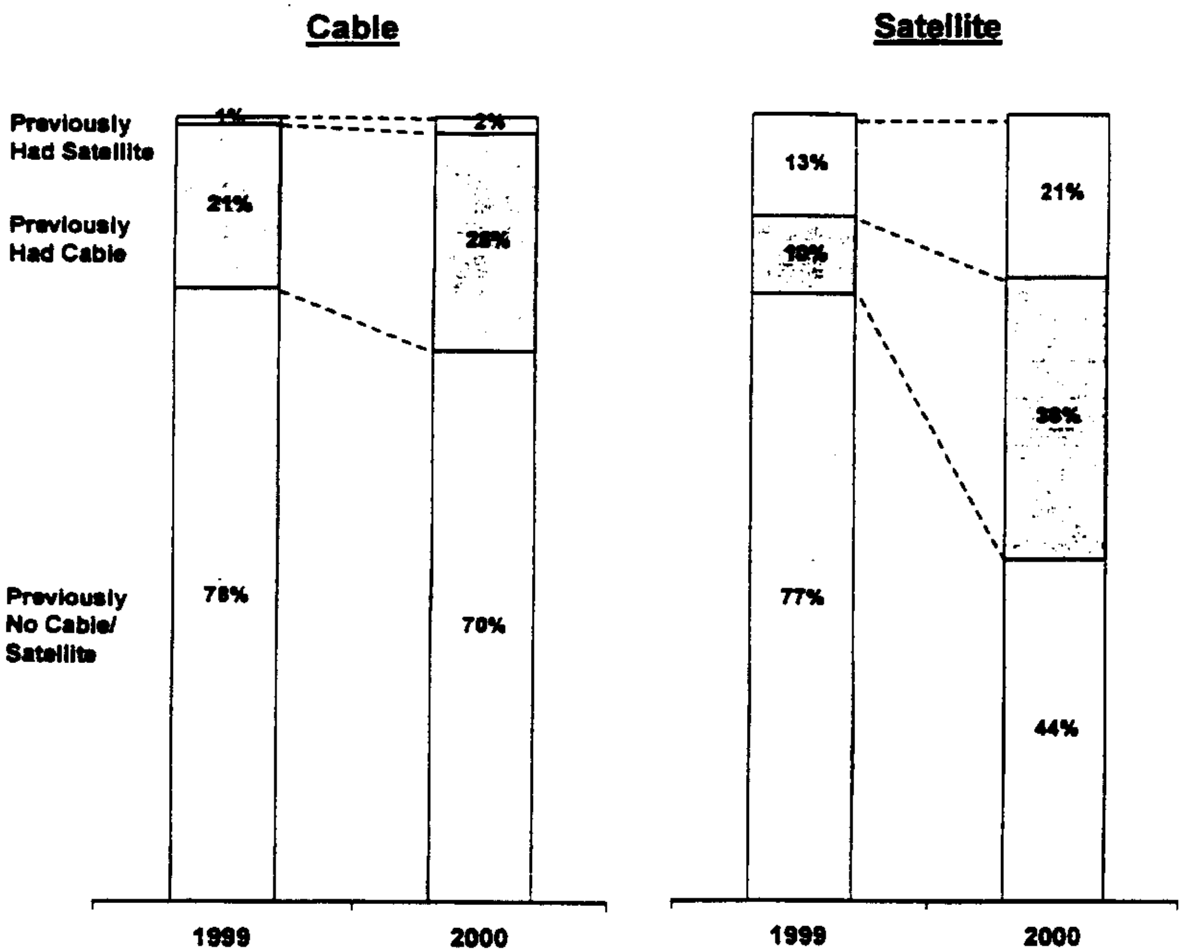
Income (in HH)			
Less than $35,000	40%	45%	-5
$35K to $50K	19%	19%	--
$50K or more	41%	36%	+5
Mean per year (000's)	$52.7	$47.2	+$5.5
Household Size			
One	23%	28%	-5
Two	32%	33%	-1
Three+	45%	39%	+6
Residential Location			
Urban	32%	34%	-2
Suburban	53%	50%	+3
Rural	15%	16%	-1

DETAILED FINDINGS

* Switching

A Majority Of Current Cable Households Have Not Switched Cable/Satellite Service Prior To Subscribing To Cable. In Contrast, A Growing Percentage Of Satellite Households Were Previous Cable Subscribers.



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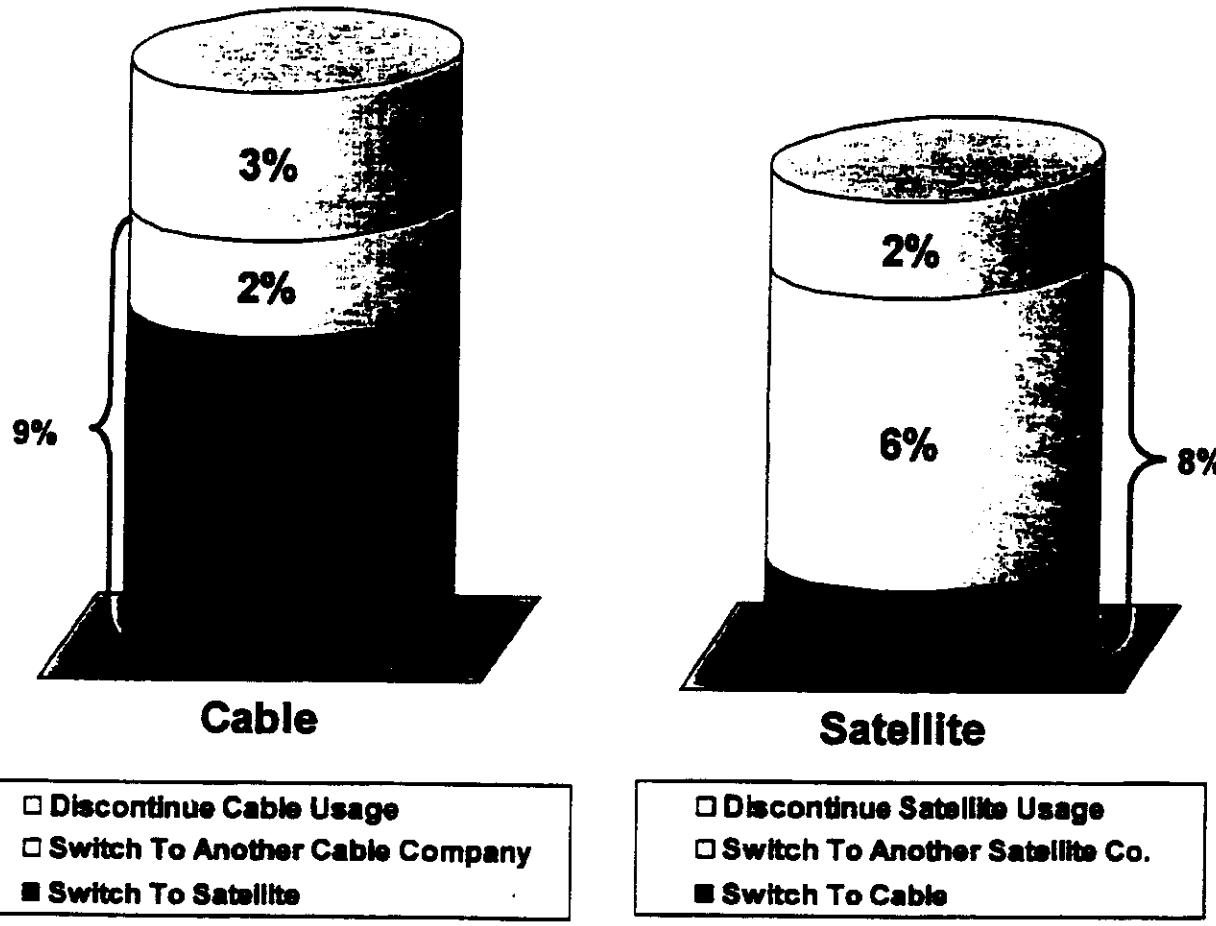
Three Times As Many Cable Subscribers Indicate A Willingness To Move To Satellite TV In The Next Year Versus Satellite Users Moving To Cable...

% Indicated Changes In The Next 12 Months



Cable Users Who Intend To Switch Providers Within The Next 12 Months Are Three Times As Likely To Switch Over To Satellite Than Go To Another Cable Company. By Comparison, Satellite Users Would Choose Another Satellite Company Over Cable.

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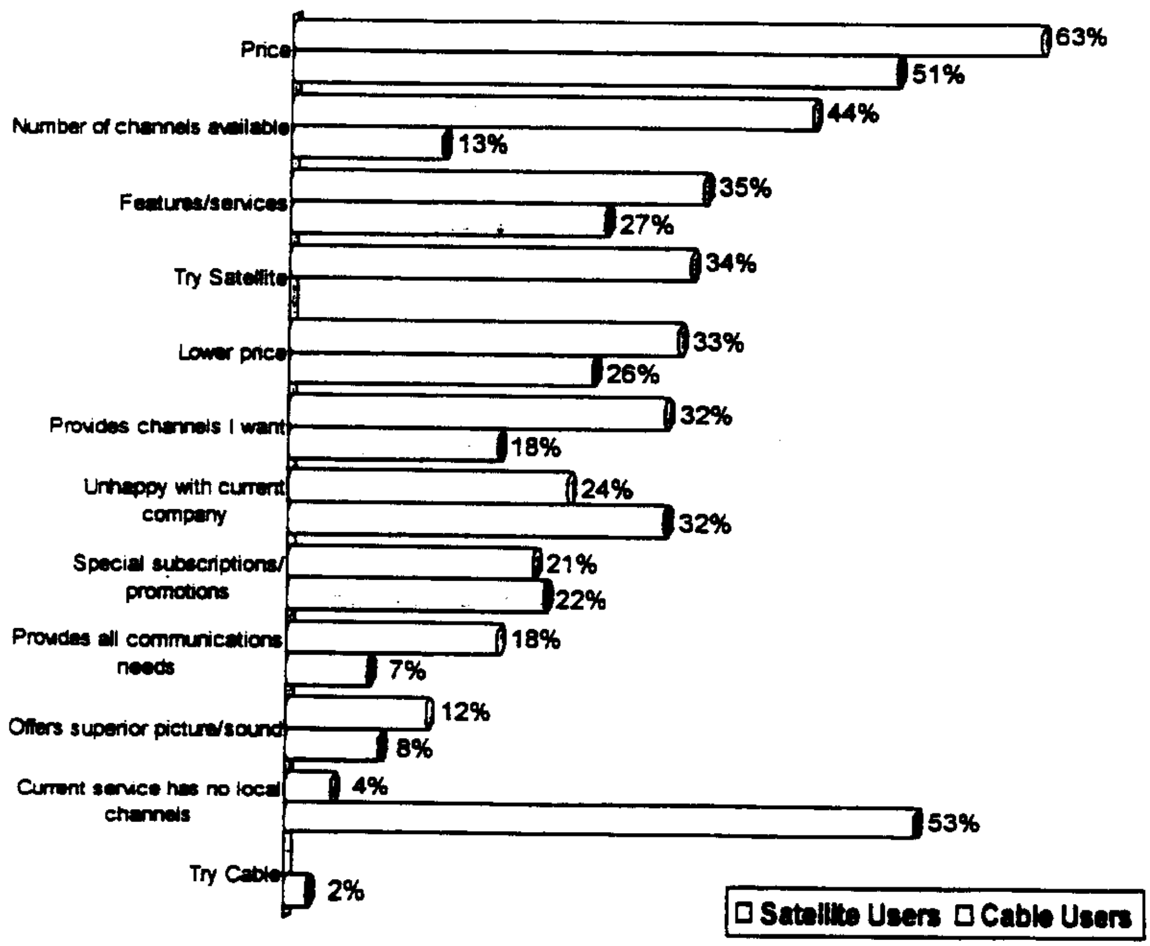
... And Cablevision Customers Are The Most Likely, While Cable One, Charter And MediaOne Subscribers Are The Least Likely, To Switch To Satellite Service.

	Switch to Satellite	Switch to Cable
Cablevision	11%	
Adelphia	9%	
Cox	8%	
AT&T Cable	7%	
Comcast	7%	
Time Warner	7%	
Cable One	6%	
Charter	6%	
MediaOne	6%	
DirecTV		2%
Dish Network		2%

Cable Subscribers Site "Price" As The Reason They Are Most Likely To Change Providers. Among Satellite Providers, "Lack Of Local Programming" Slightly Edges Out "Price" As The Main Reason To Switch.

% Top 3 Reasons Likely to Switch From Current Provider*



* Base: Those who indicated that they intend to switch Cable/Satellite providers within the next 12 months
Note: Multiple responses accepted

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DETAILED FINDINGS

* Future Competitive Environment

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Market Overview
Future Competitive Environment

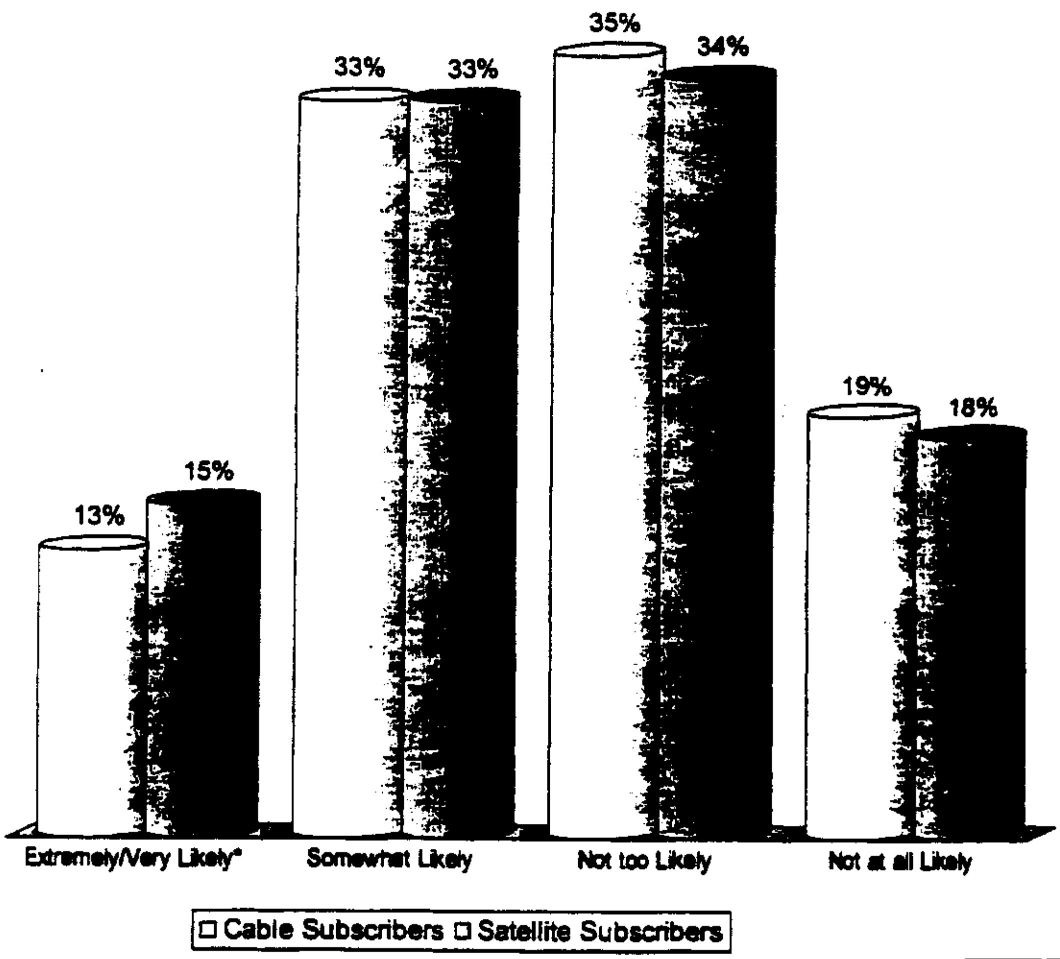
* The turn of this new century has moved cable and satellite TV providers into a fierce competition with not only themselves but with both the telephone and Internet industries as well. With the advent of bundling and its slow but steady rate of growth, many cable companies face interesting times ahead. AT&T's recent purchases within the cable industry, coupled with Time Warner's pending merger with AOL are truly indicative of the current state of the entire telecommunications industry. Mass media providers, those companies able to supply multiple services under one corporate umbrella, are beginning a push into all aspects of the telecommunications industry.

* Satellite providers are faced with an important decision in the near future. Despite high levels of growth in recent years, the impending merging of services could represent a slight stumbling block for most satellite providers. Satellite providers current ability to offer only limited telecommunications services beyond satellite television may present a major factor in the decision making process among households trying to choose a bundled service provider.

* Consumer acceptance of the idea of cable and satellite TV carriers as their only telecommunications provider continues to grow. However, their ultimate success or failure will rely on their ability to position themselves as more than just television providers. Both the cable and satellite TV industries must prepare themselves to offer a full range of services including television, telephone, high-speed Internet access and Internet telephony as options to subscribers.

Satellite Users Are Only Slightly More Likely Than Cable TV Subscribers To Change To One Company For All Of Their Telecommunication Needs.

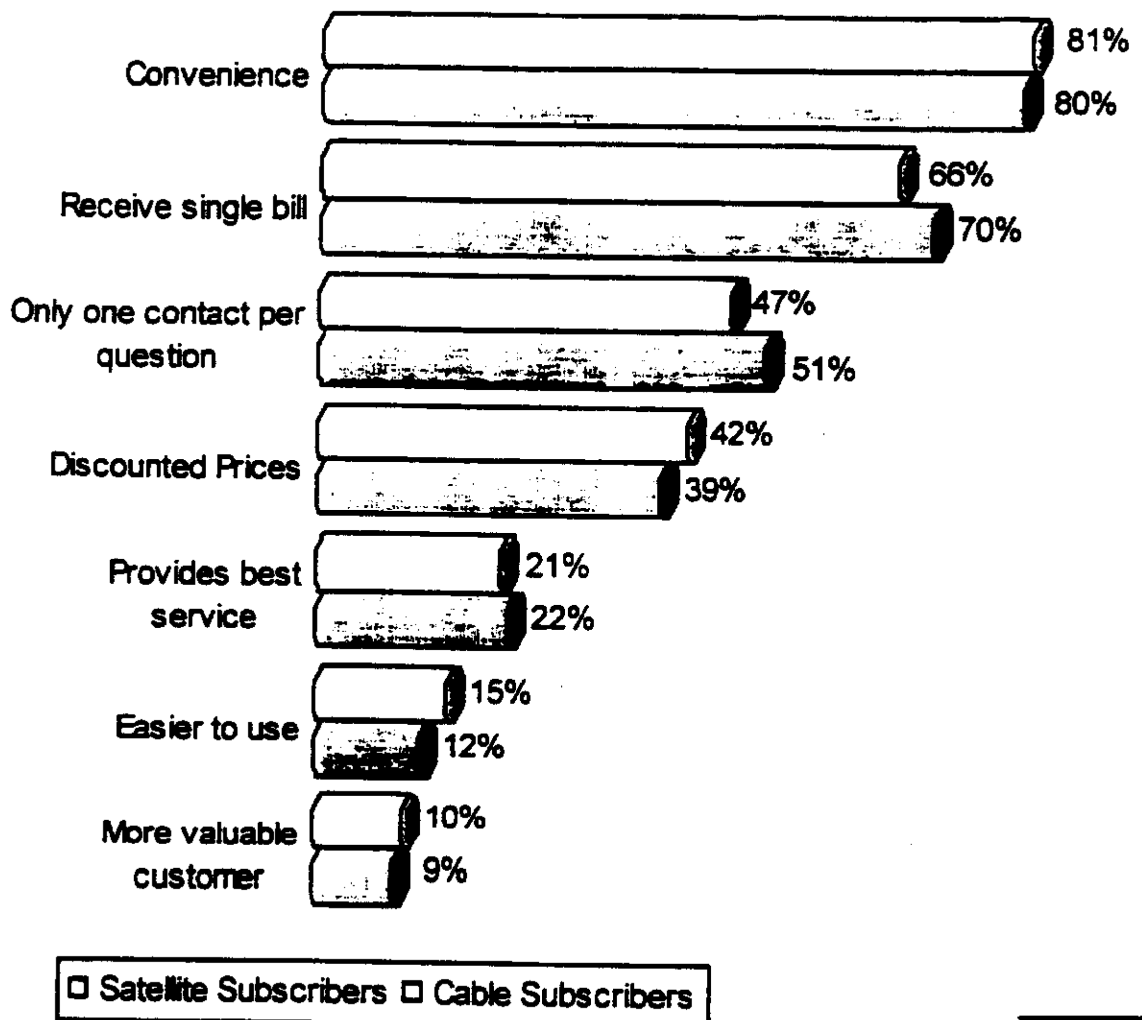
Likelihood Of Switching Current Subscriptions To One Company That Offers All Telecomm. Services



* Includes those who report they already do bundle services

Convenience Is The Main Reason That Both Cable And Satellite Customers Mention For Wanting To Combine Their Telecommunications Services. Receiving One Bill And Having Only One Contact Are Also Important To Cable/Satellite Subscribers.

% Top 3 Reasons Likely To Switch All Telecomm Services To One Company*



* Among those who are "extremely/very/somewhat" likely to switch all telecomm. services to one company

Source: 2000 JDP&A Cable/Satellite CSI Study

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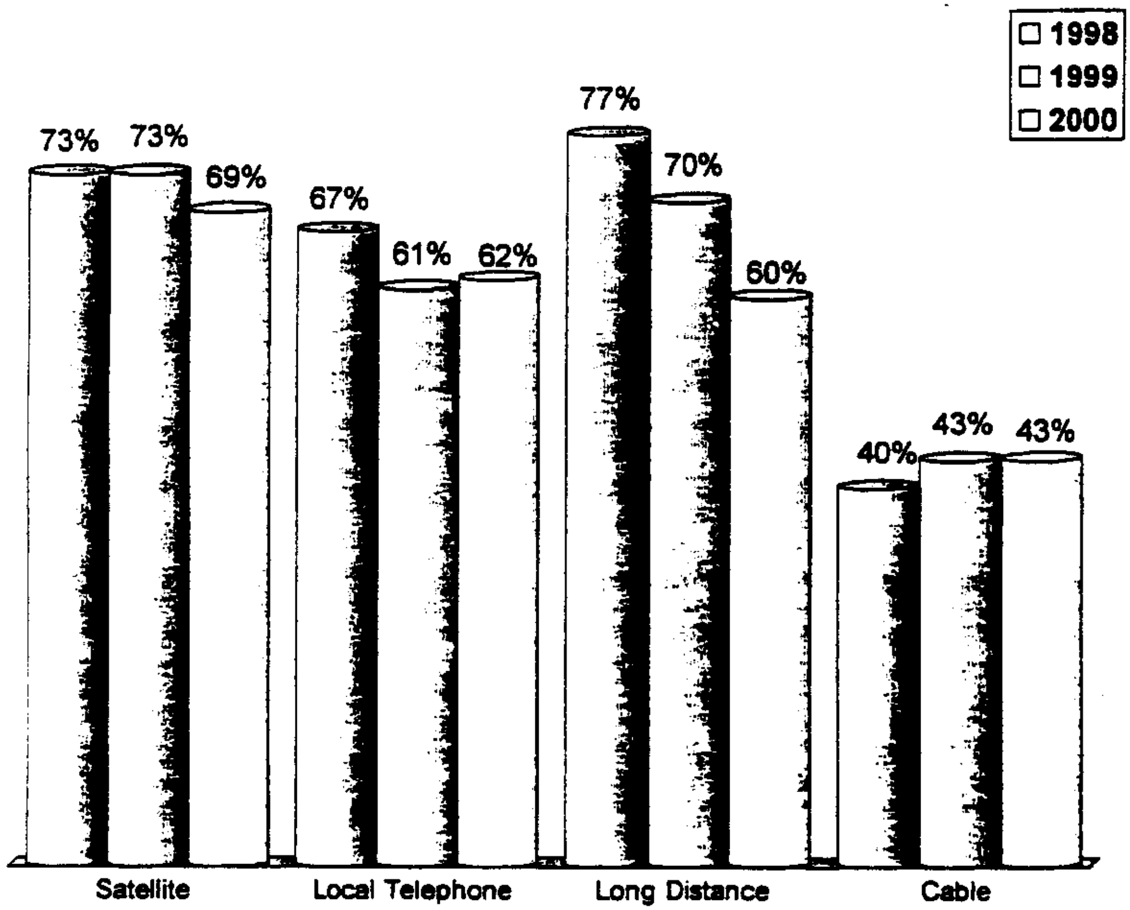
Overall Satisfaction Levels Have Fallen Across Most Industries Since 1999. Satellite Remains In Front Of Local And Long Distance Providers By A Respectable Margin, While Cable Continues To Trail The Other Industries.

% "Extremely/Very" Satisfied Overall With Current Carrier



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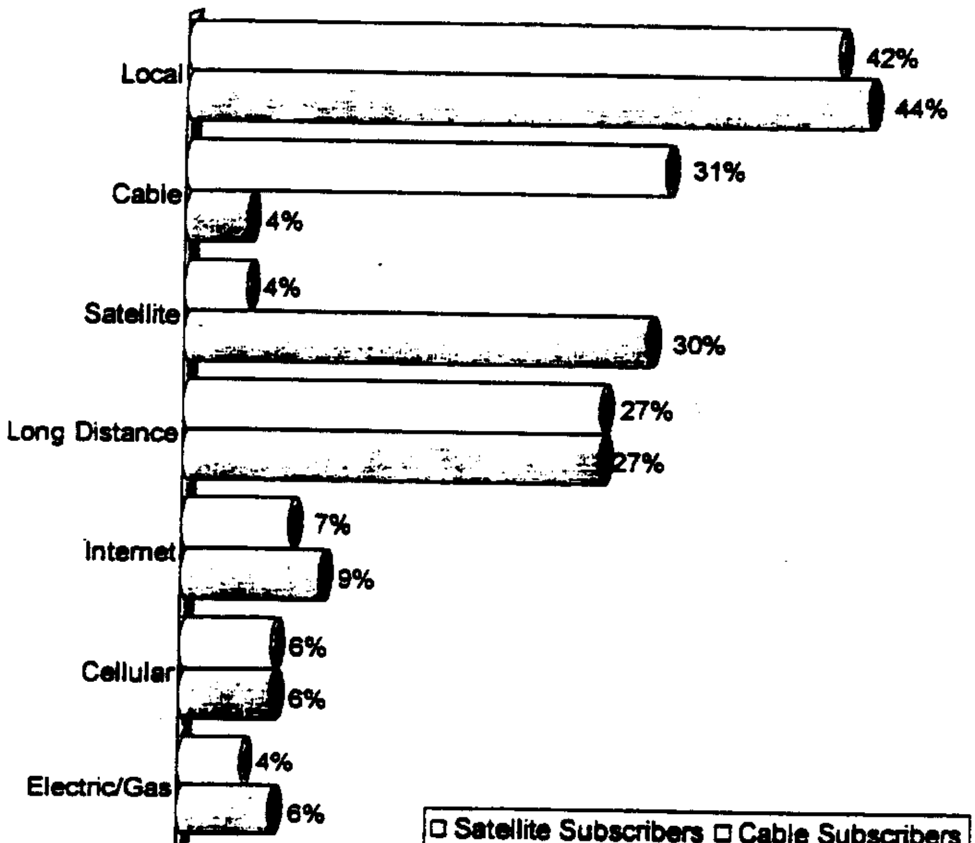
While Local Carriers Are The Top Choice Most Often, 1 in 3 Cable/Satellite Subscribers Would Select Their Satellite Or Cable Company.

Carrier Type Most Likely To Select For All Telecomm. Needs*



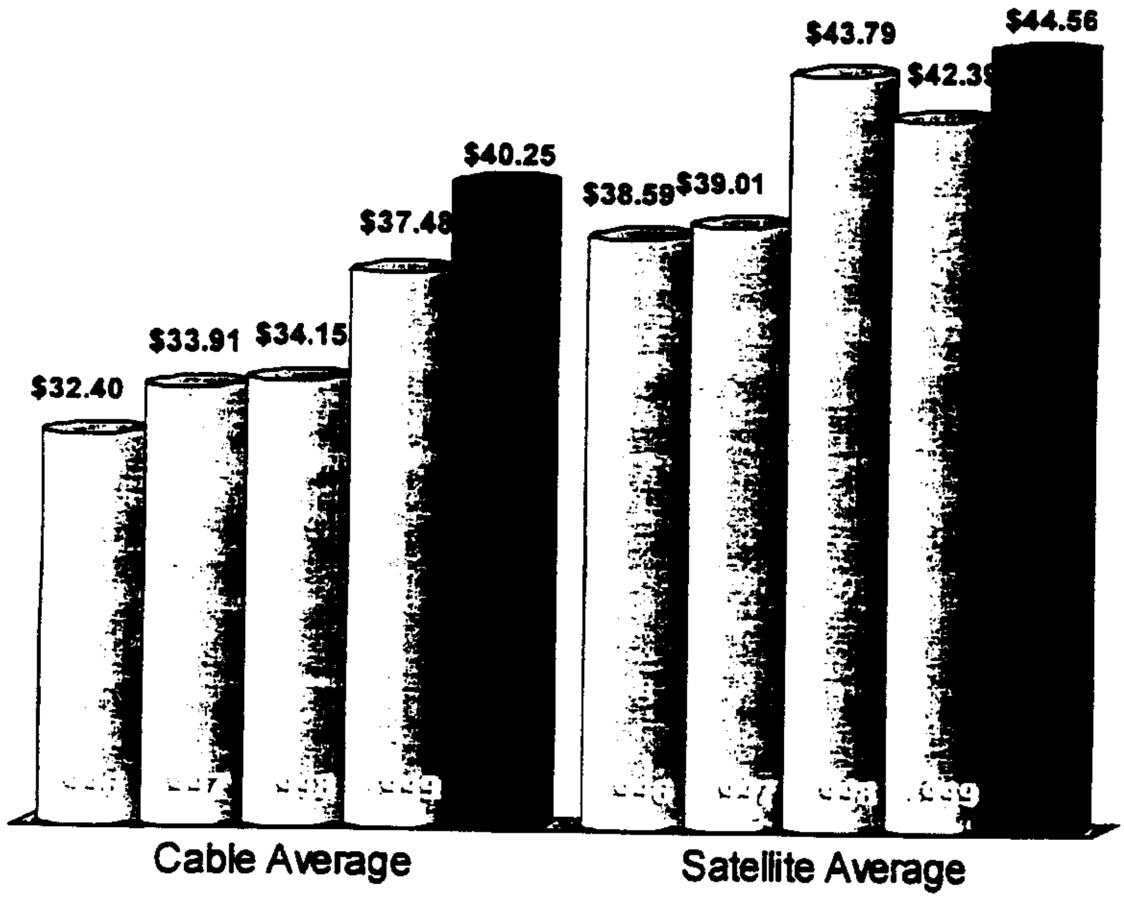
* Among those who are "extremely/very/somewhat" likely to switch all telecomm. services to one company

DETAILED FINDINGS

* Usage Patterns

Average Expenditures Per Month Have Continued To Increase For Cable TV Users, Resulting In Both Cable And Satellite Users Reporting The Highest Levels Of Expenditures In The Past Five Years.

Average Monthly Expenditure on Cable/Satellite TV Service



Base: Have expenditures for cable and/or satellite service

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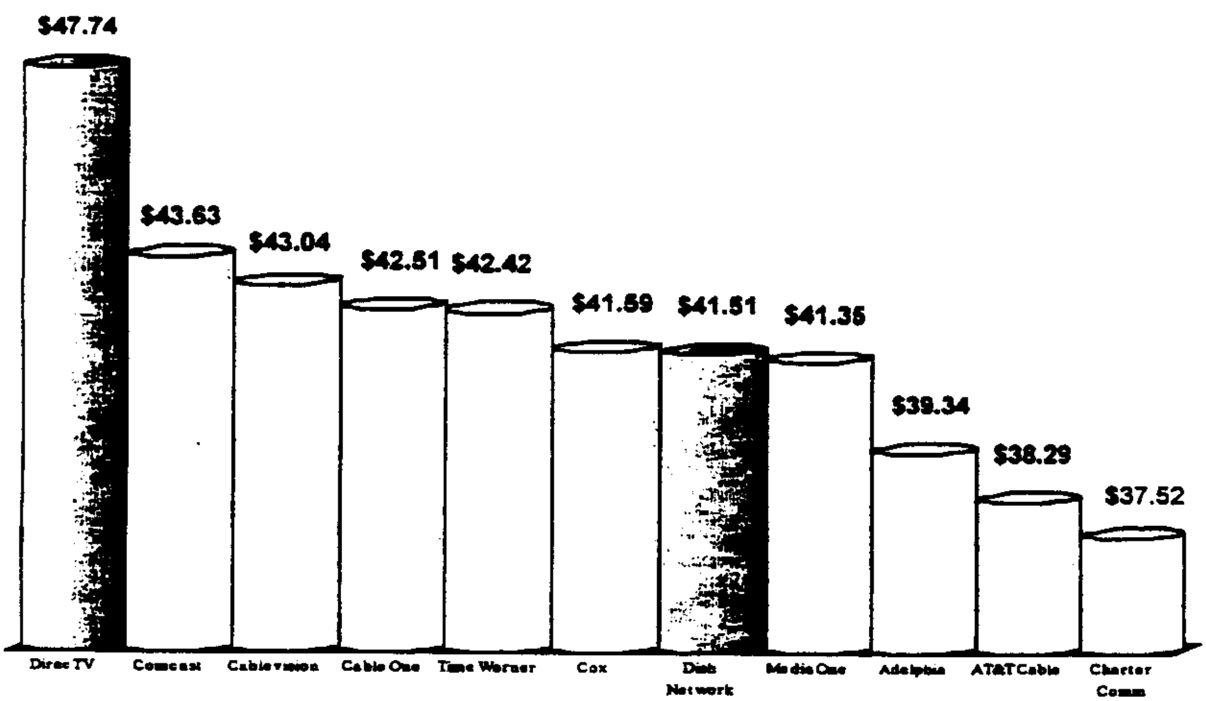
DirecTV Subscribers Have The Highest Average Monthly Cable/Satellite Expenditures, While Charter Users Report Having The Lowest.

Average Monthly Expenditure on Cable/Satellite TV Service By Provider:



Base: Have expenditures for cable and/or satellite service

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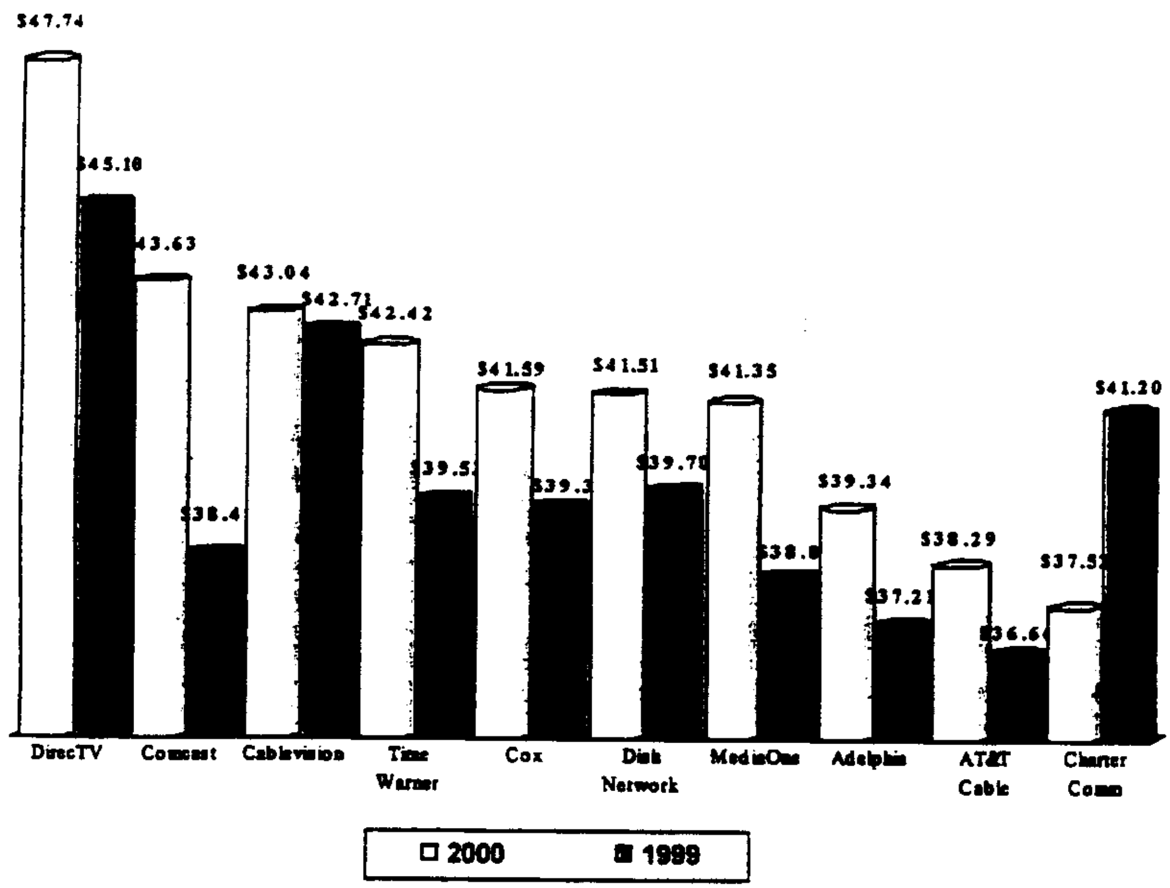
Echostar Users Report The Highest Change In Average Monthly Expenditures While, Charter Users Reported The Largest Decrease In Average Monthly Spending Since 1999.

Comparison Of Average Monthly Expenditure on Cable/Satellite TV Service By Provider Since '99:



Base: Have expenditures for cable and/or satellite service

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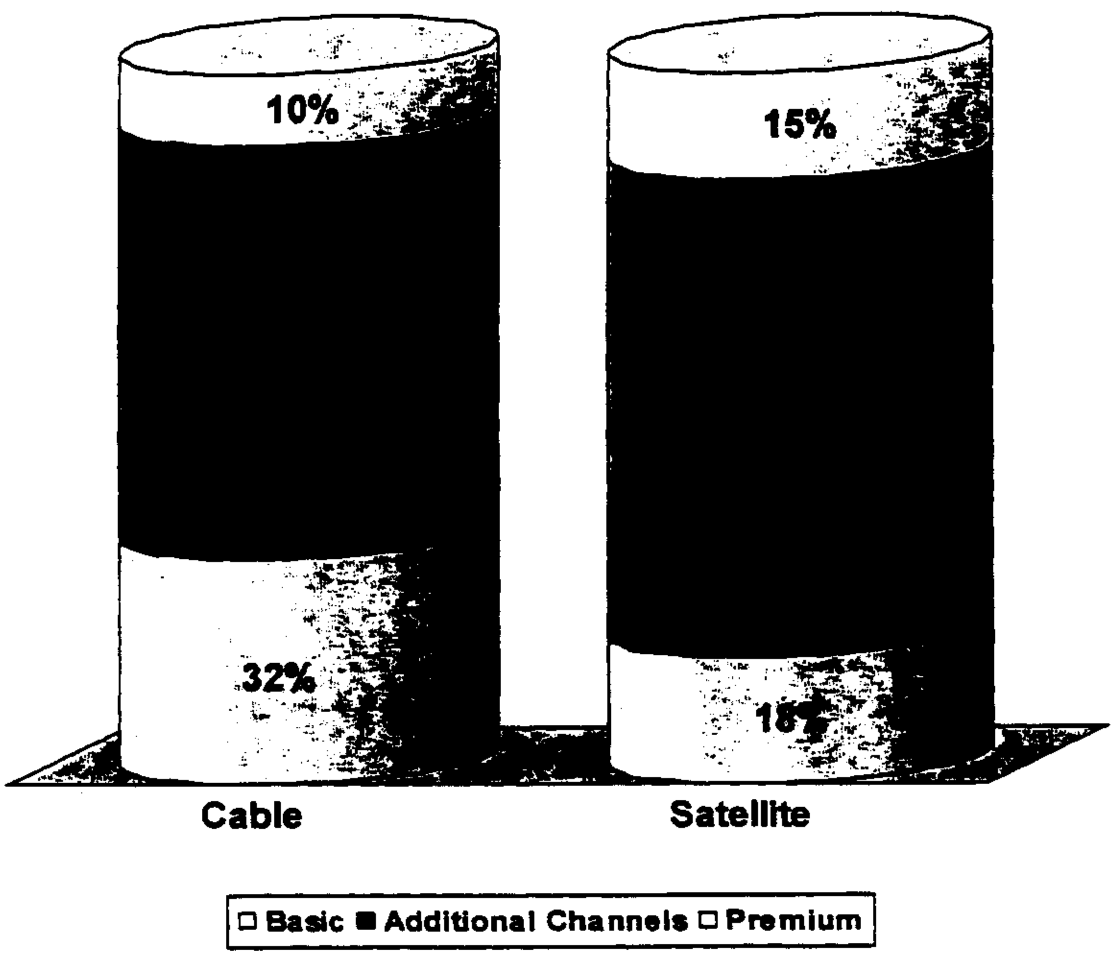
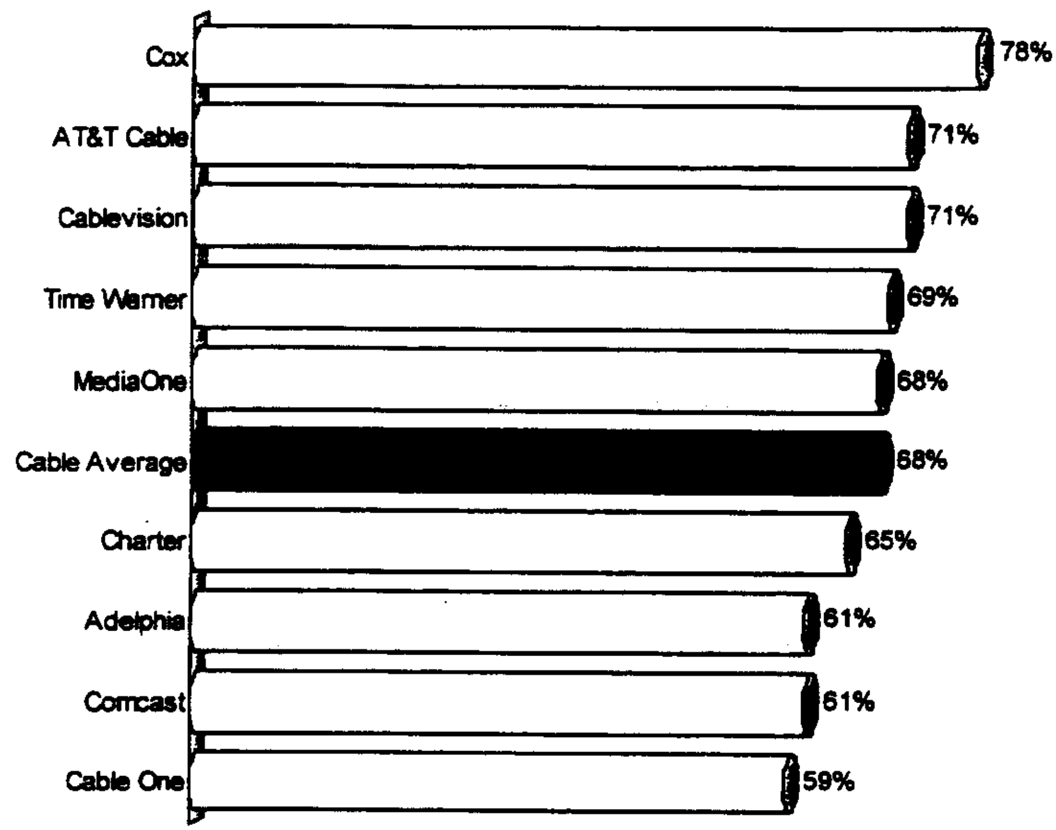
Four Out Of Five Satellite Customers Subscribe To Additional Channels For Which They Pay More. Nearly One-Third Of All Cable Subscribers Receive Only The Basic Package.

% Service/Package Currently Subscribe To



Two-Thirds Of The Cable Households Subscribe To Additional Channels Beyond Basic. Cox Leads The Cable Providers By Having The Highest Proportion Of Customers Subscribing To Expanded Services, Followed By AT&T Cable, Cablevision And Time Warner.

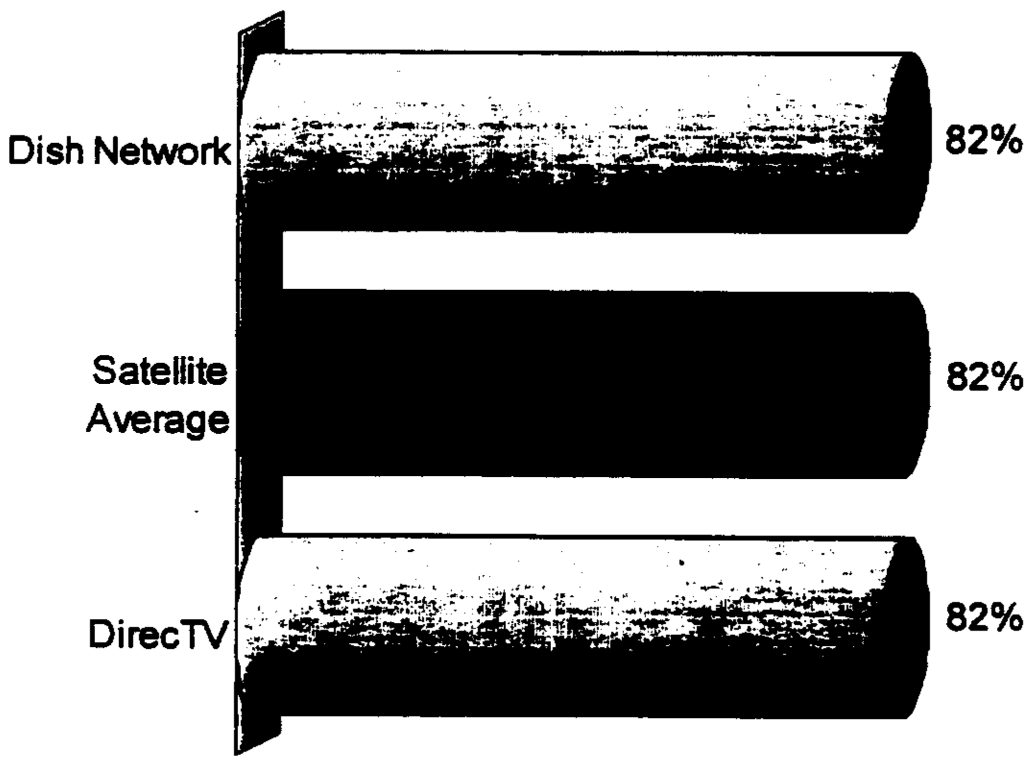
% Subscribe To Basic Plus Additional Channels*



* Base: Subscribe to cable service

Among Satellite Users, Eight Out Of Ten Customers Subscribe To Additional Channels Beyond Basic.

% Subscribe To Basic Plus Additional Channels



Base: Subscribe to cable and/or satellite service