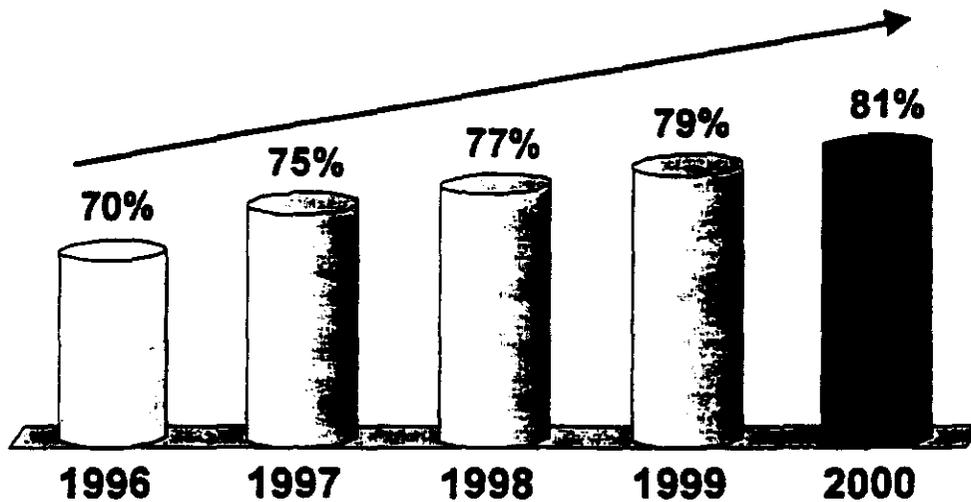


DETAILED FINDINGS

* 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%

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

	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>
<u>Cable Providers</u>	%	%	%	%	%
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
<u>Satellite Providers</u>					
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

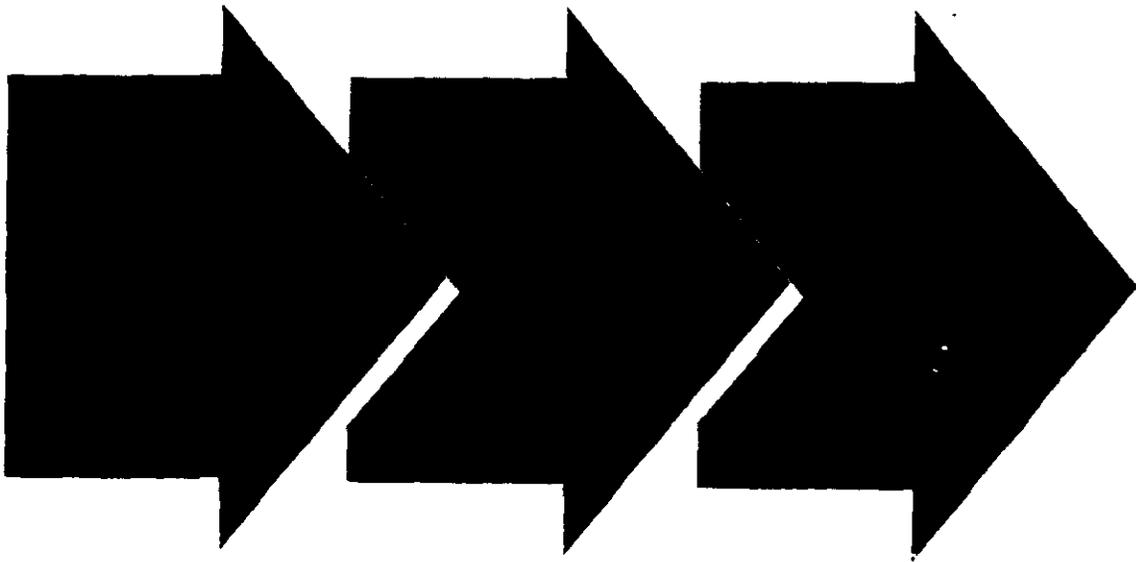
J.D. POWER
AND ASSOCIATES

DETAILED FINDINGS

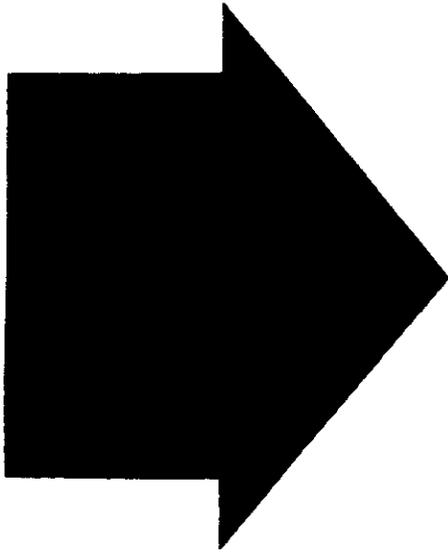
*** Customer Satisfaction Measurement Process**

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

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

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

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

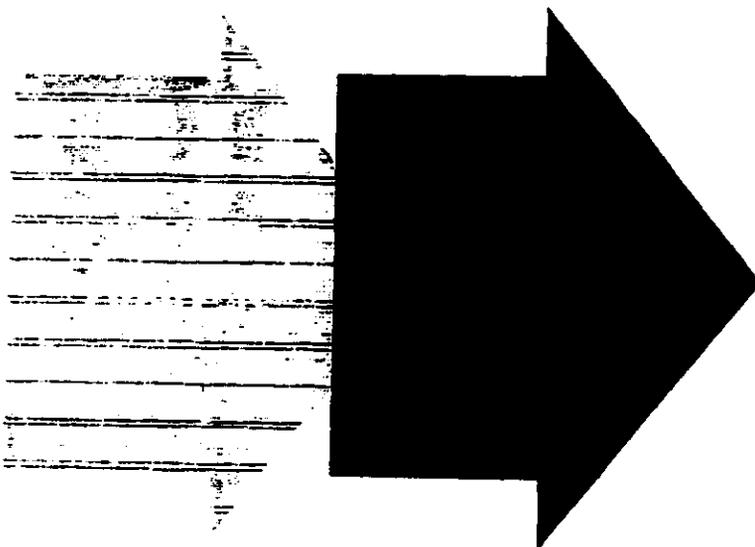
Customer Service

- 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

Reception Quality

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

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

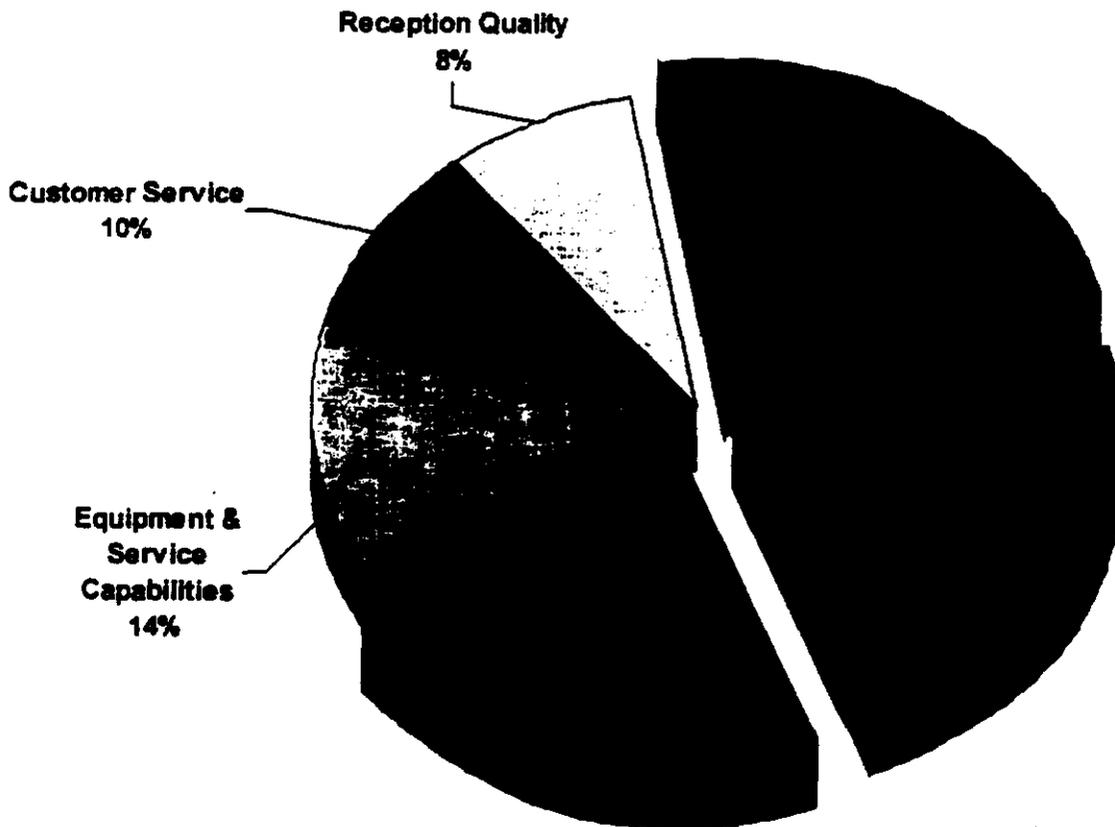


Identifies unique
satisfaction
dimensions and
eliminates non-
discriminating
dimensions

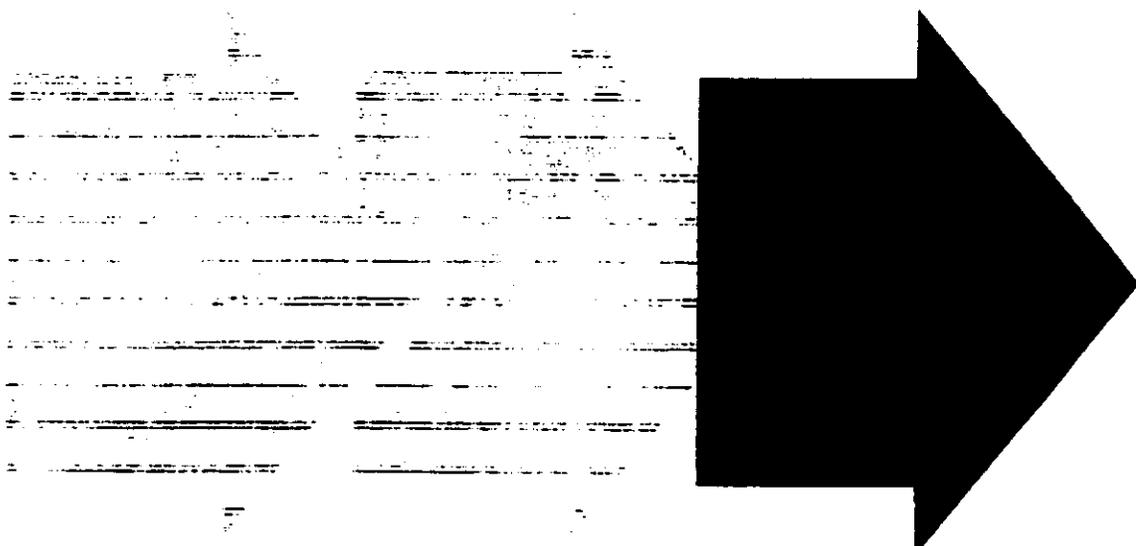
**Identifies
importance
based on
implied
weights of
each unique
dimension**

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.



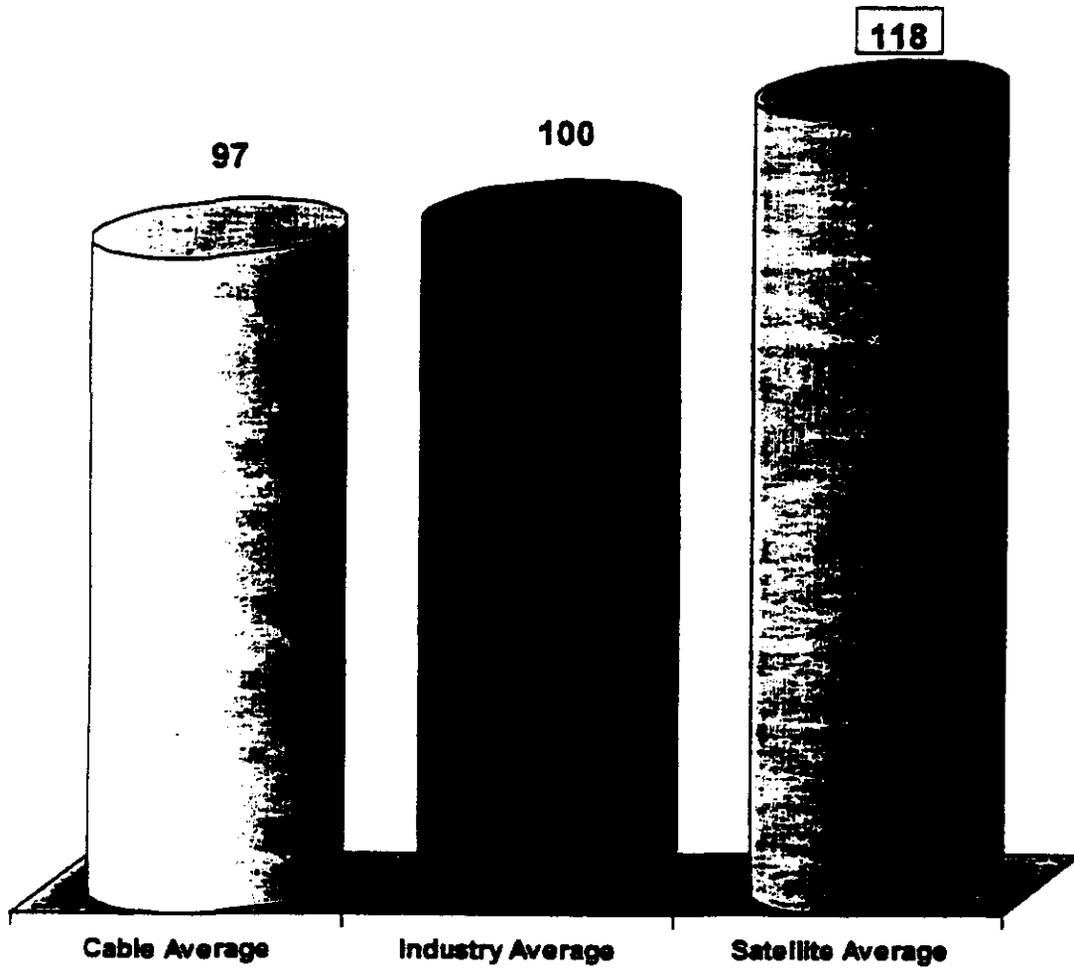
Identifies unique satisfaction dimensions and eliminates non-discriminating dimensions

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.

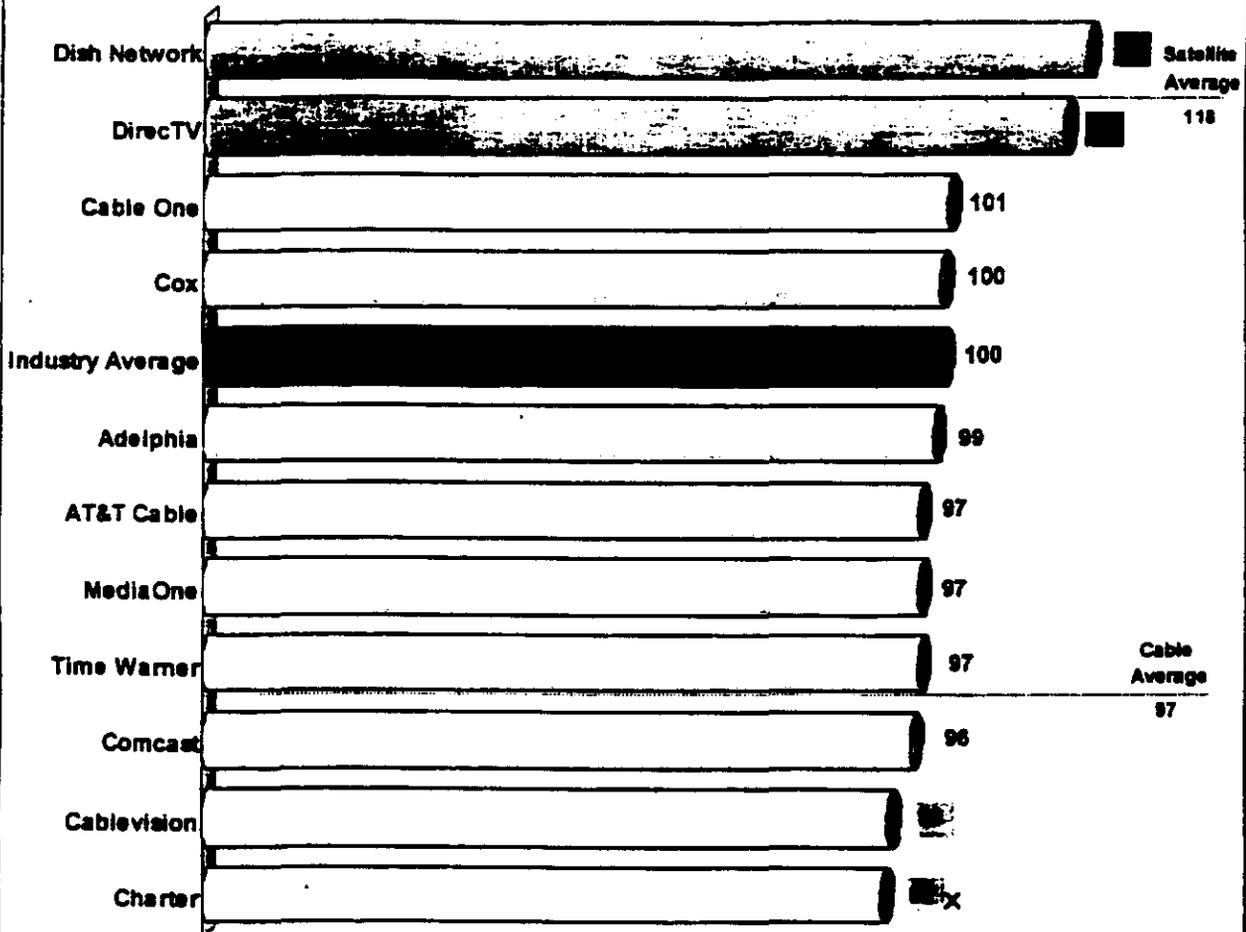
Customer Satisfaction Index Scores



= Statistically above industry average at 95% confidence level

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



■ = 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



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.

	<u>Overall Satisfaction</u>	<u>Cost of Service</u>	<u>Credibility/Billing</u>	<u>Program Offerings</u>	<u>Equipment & Service Capabilities</u>	<u>Customer Service</u>	<u>Reception Quality</u>
Satellite Average	118	121	117	120	113	113	126
Cable Average	97	96	97	98	98	98	96
Cable One	101	102 ✓	101	100	102	100	96
Cox	100	97	101	100	104 ✓	100	102 ✓
Adelphia	99	101 ✓	98	97	99	99	96
Time Warner	97	96	99	96	99	99	97
AT&T Cable	97	100	98	97	98	96	96
MediaOne	97	96	97	98	97	101	96
Comcast	96	96	96	96	98	101	96
Cablevision	96	96	96	96	96	97	96
Charter	96	96	96	96	96	96	96

■ = 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



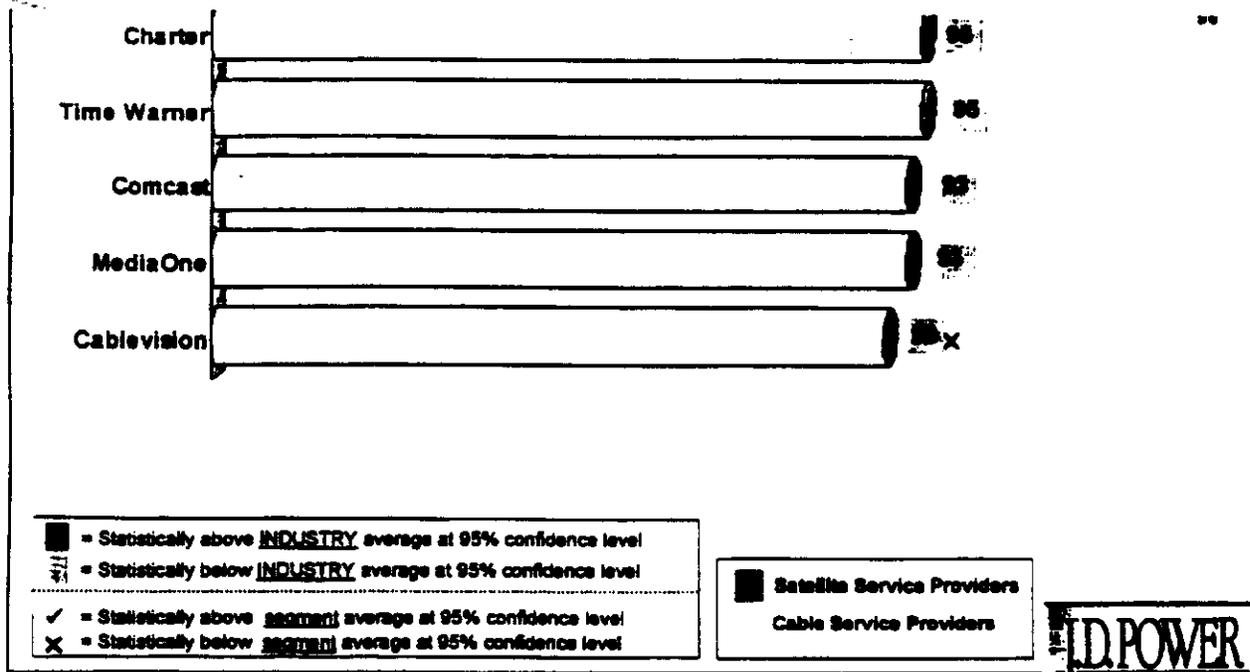
DETAILED FINDINGS

*** Customer Satisfaction On A Factor Level**

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



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.

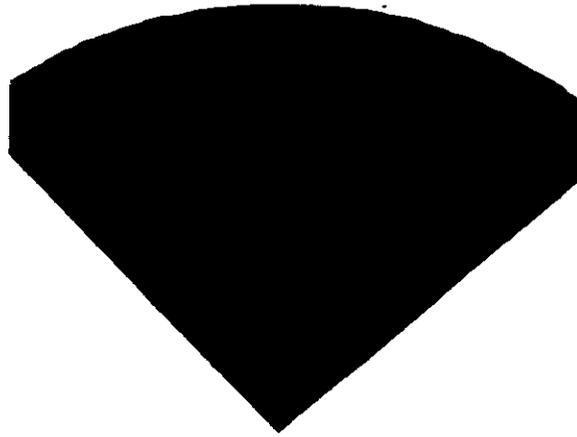
+/- Difference of Cost of Service Attribute Scores Vs. The Industry Average

Provider	Cost of Service	Monthly Service	Equipment	Installation	Porting	Other	Industry Average
							100
Dish Network	+11✓	+7✓	+6✓	+3✓	0		+27✓
DirecTV	+6✓	+6✓	+4✓	+2	0		+18✓
Charter	-2	-1	-1	-1	0		-5X
Time Warner	-2	-1	-1	-1	0		-5X
Comcast	-3X	-1	-2	-1	0		-7X
MediaOne	-4 X	-1	-1	-1	0		-7X
Cablevision	-4 X	-2	-2	-1	-1		-10X

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 X = Statistically below INDUSTRY average at 95% confidence level



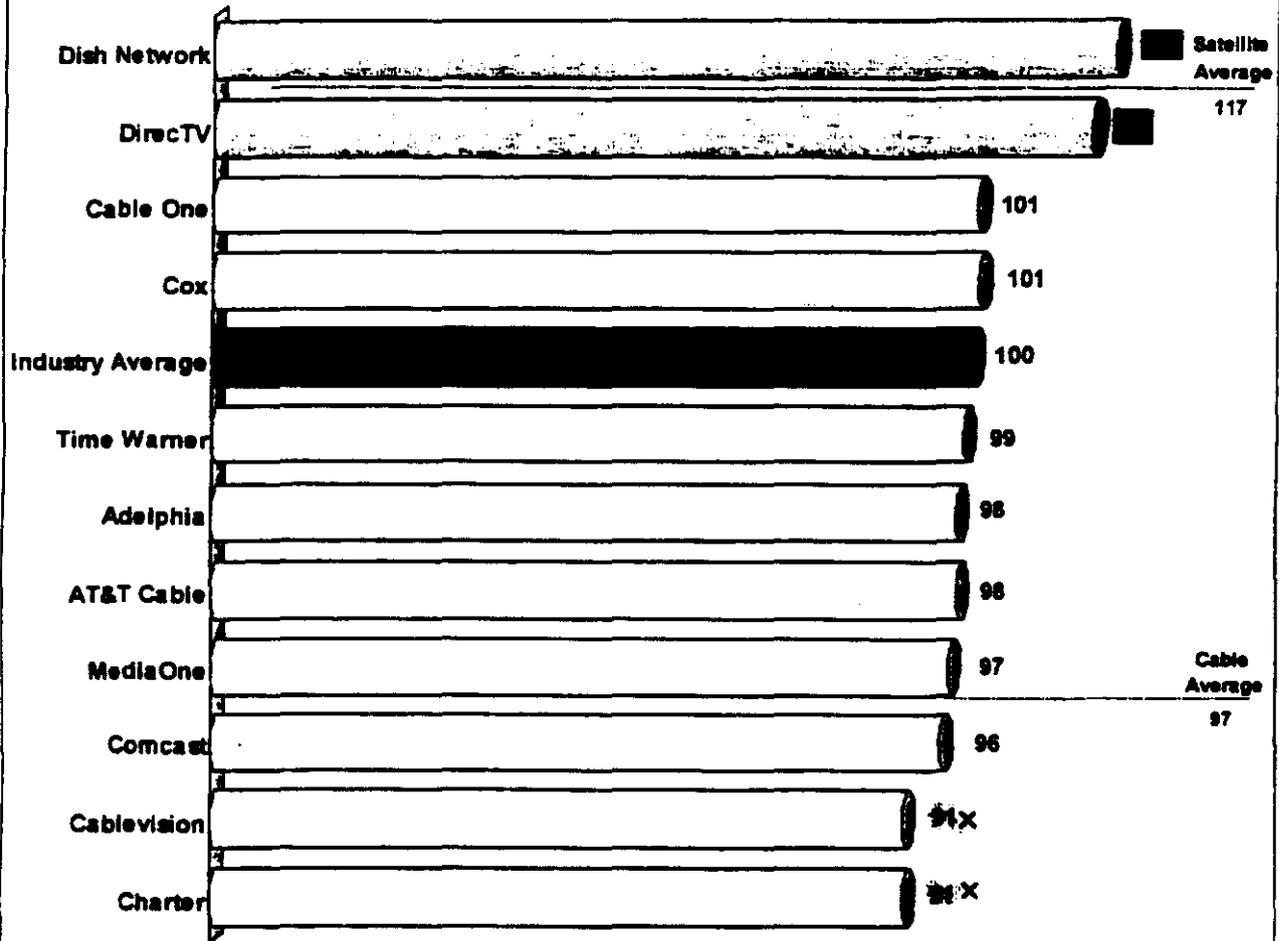
Credibility/Billing



- ❖ 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



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

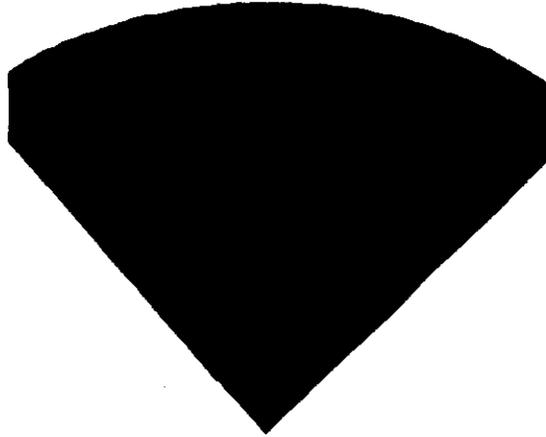
	Technical Innovator	Company's Reputation	Company's Honesty									Total
Dish Network	+5 ✓	+4 ✓	+3 ✓	-2	+2	+1	+2	+2	+1	+1	0	+19 ✓
DiracTV	+4 ✓	+4 ✓	+3 ✓	-3 X	+2	+1	+2	+1	+1	+1	0	+18 ✓
Cablevision	-3 X	-3 X	-1	0	0	0	0	0	-1	0	-1	-9 X
Charter	-3 X	-3 X	-1	0	-1	0	0	0	-1	0	0	-9 X

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

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X = Statistically below INDUSTRY average at 95% confidence level

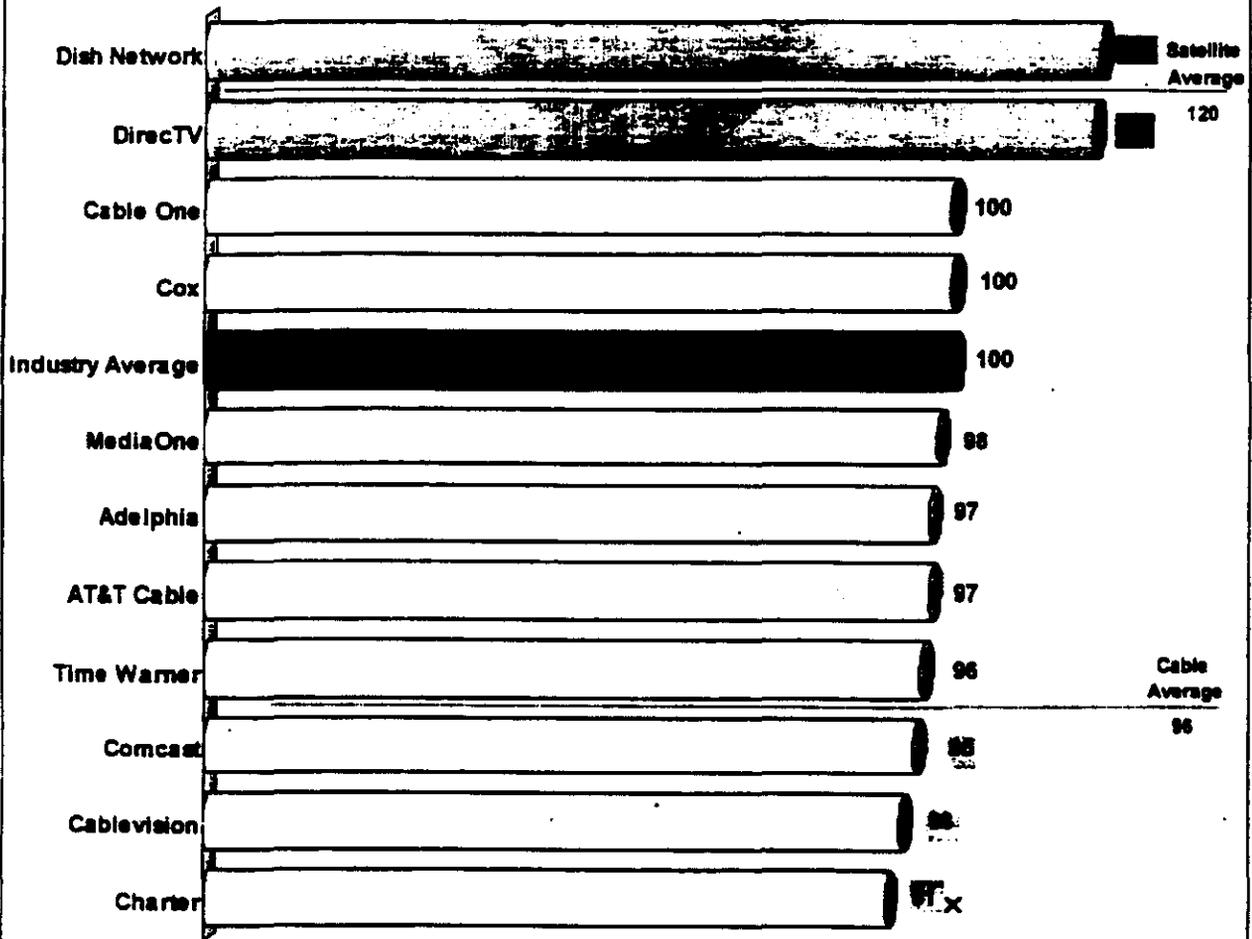
Program Offerings



- ❖ 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



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 Program Offerings Attribute Scores Vs. The Industry Average

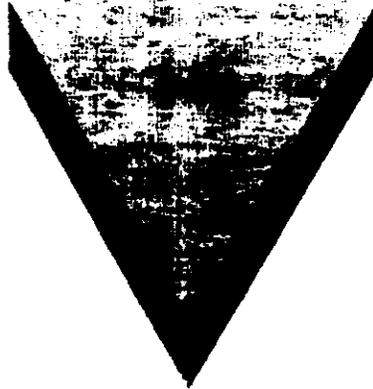
	1	2	3	4	5	6	7	Total
Dish Network	+5 ✓	+5 ✓	+3 ✓	+3 ✓	+3 ✓	+3 ✓	-1	+21 ✓
DirectTV	+3 ✓	+5 ✓	+5 ✓	+2	+2	+3 ✓	-1	+19 ✓
Comcast	0	-1	-1	-1	-1	-1	0	-6 X
Cablevision	-1	-2	-1	-1	-1	-1	0	-7 X
Charter	-1	-2	-1	-1	-2	-2	0	-9 X

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

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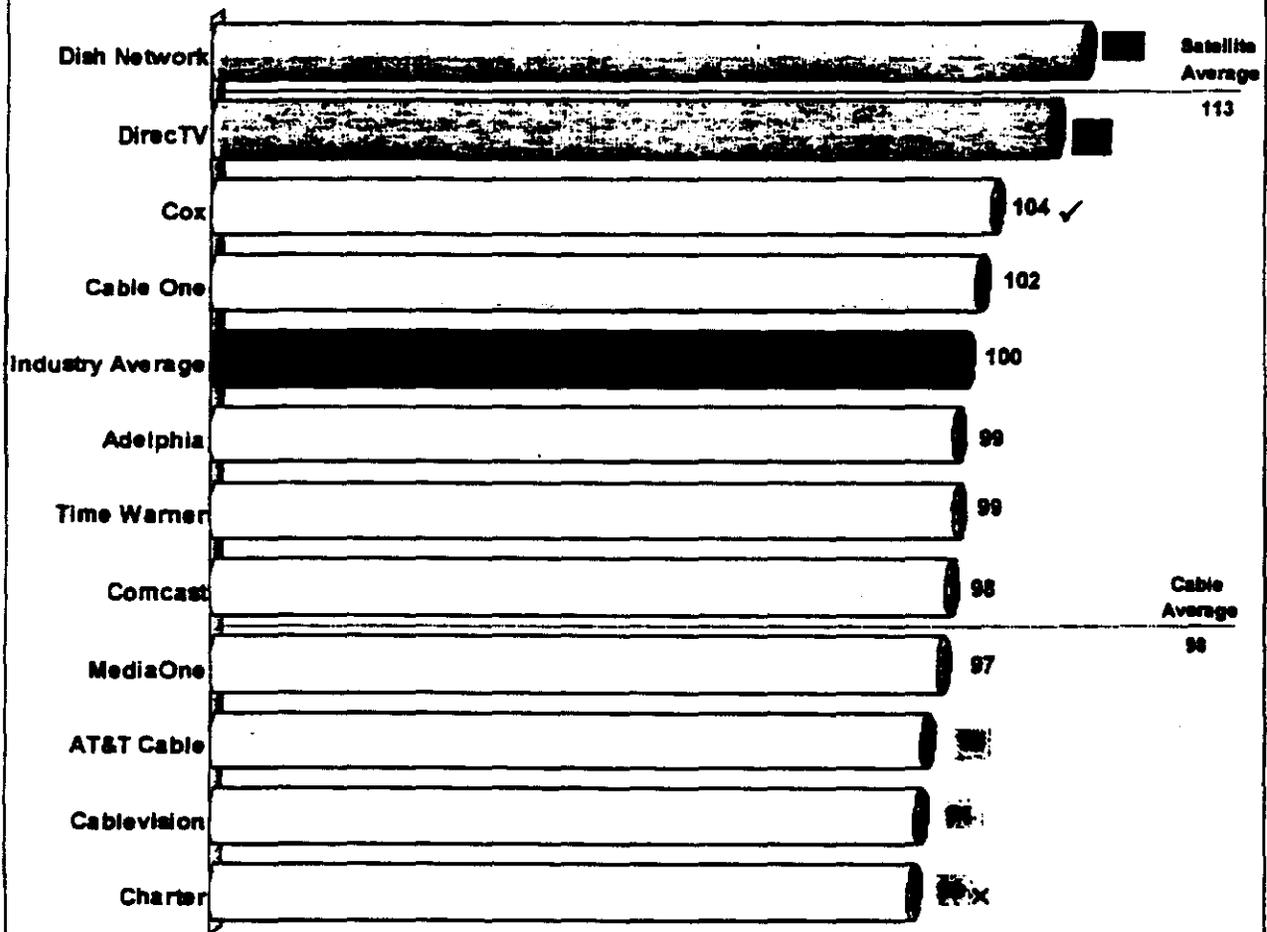
Equipment & Service Capabilities



- ❖ 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



■ = 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



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					Top
Industry Average						100
Dish Network	+2	+5 ✓	+5 ✓	+4 ✓	0	+16 ✓
DirectTV	0	+5 ✓	+5 ✓	+2	0	+12 ✓
AT&T Cable	-2	-2	-1	-1	+1	-5 X
Cablevision	-2	-2	0	-1	-1	-6 X
Charter	-2	-3 X	-1	0	-1	-7 X

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

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