DETAILED FINDINGS

* Digital Vs. Analog

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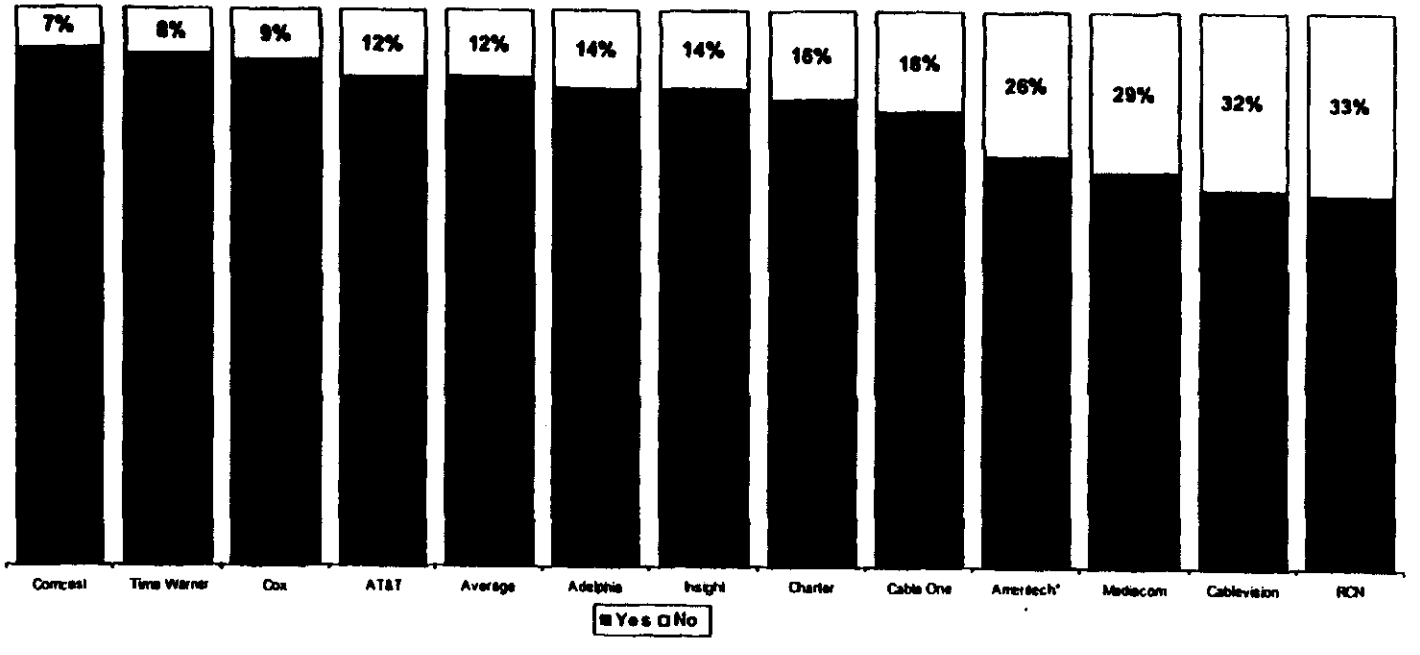
Comcast, Time Warner, And Cox Customers Have The Highest Levels Of Awareness Concerning Their Companies Ability To Offer Digital Cable.

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



* = americast cable provided by Ameritech

Source: 2001 JDP&A Cable/Satellite CSI Studies

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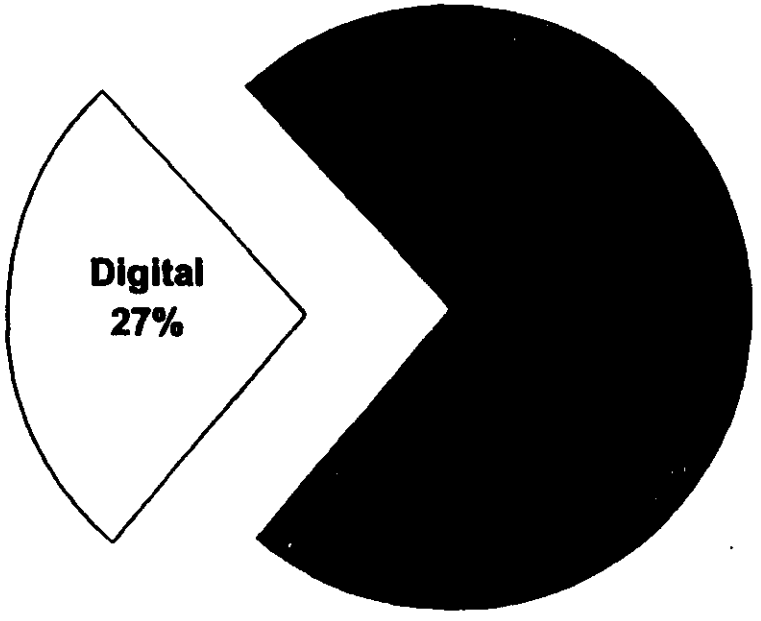
Slightly More Than One Quarter Of Cable Households Report Subscribing To Digital Service.

% Of Cable Households Who Report Subscribing To Digital Service:



Source: 2001 JDP&A Cable/Satellite CSI Studies

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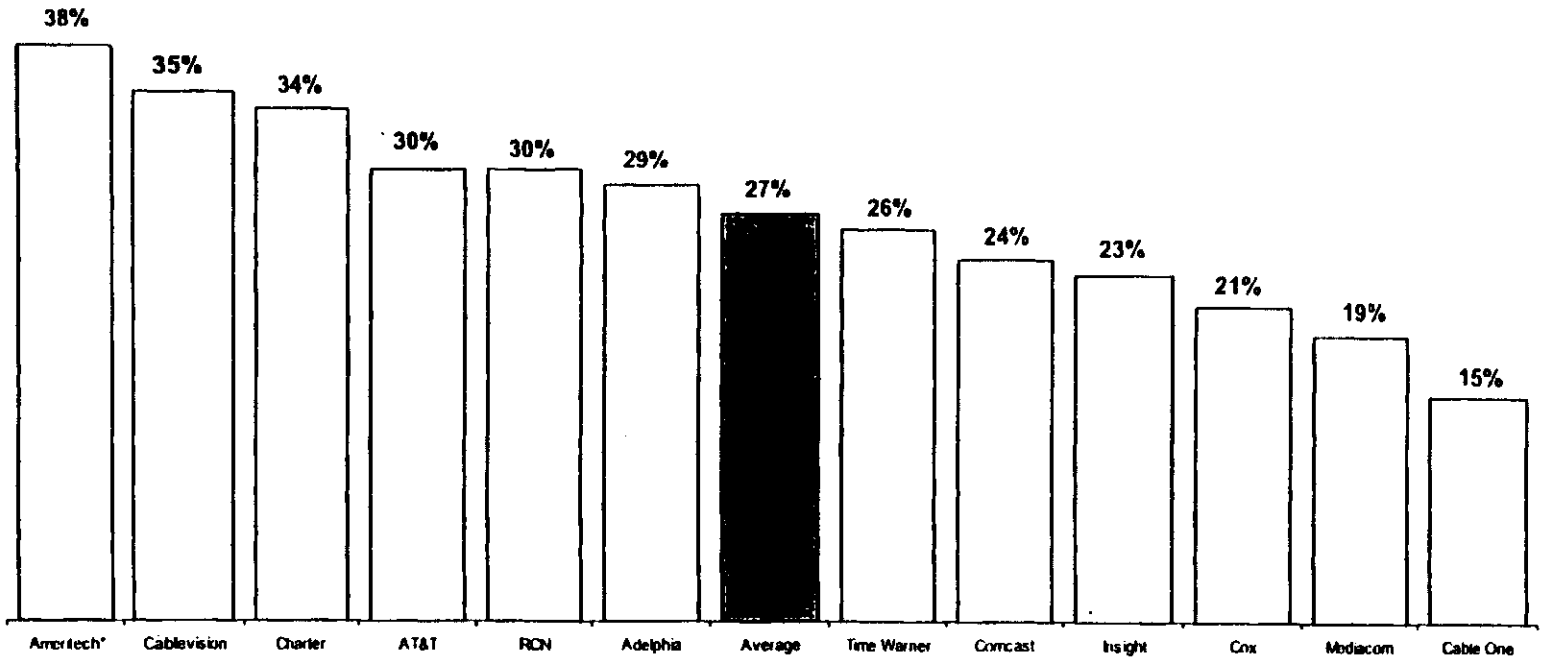
Ameritech Americast's Customers Have The Highest Reported Incidence Of Subscribing To Digital Service. Cable One Customers Have The Lowest Incidence.

% HH's That Report Subscribing To Digital Service:



* = americast cable provided by Ameritech

Source 2001 JDP&A Cable/Satellite CSI Studies

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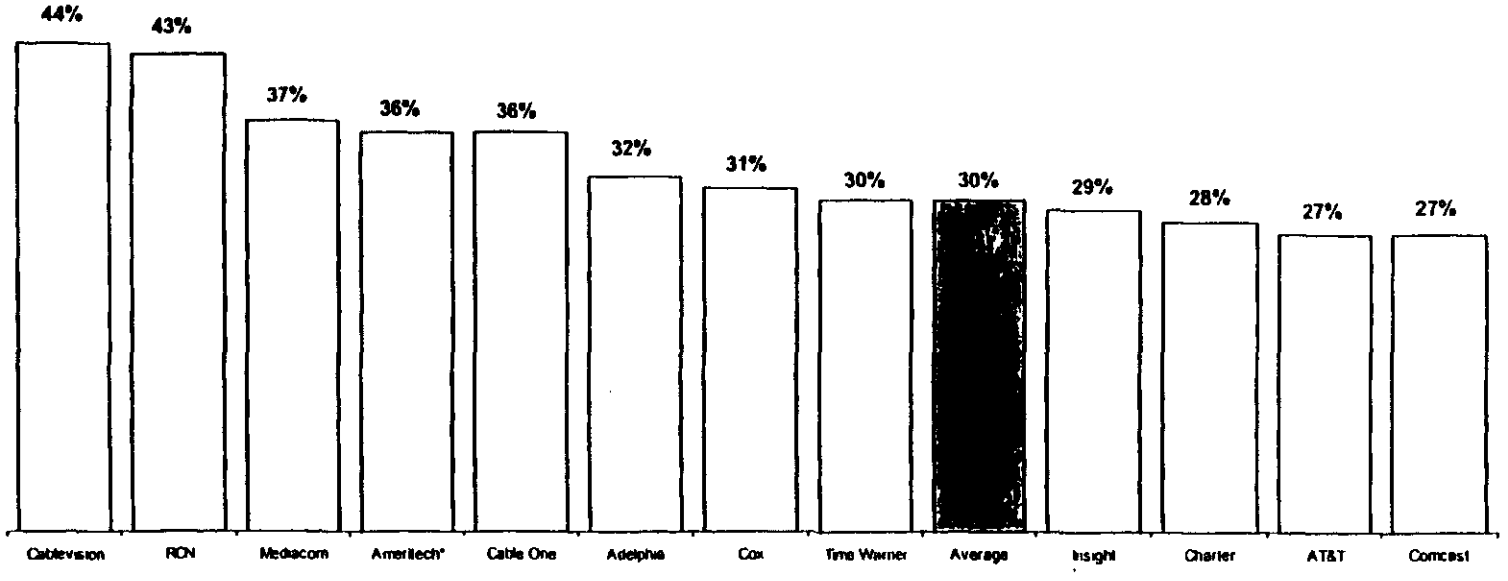
On Average, Three In Ten Households Are Interested In Changing Their Service To Digital Within The Next Twelve Months, With More Than Four In Ten Cablevision Users Showing This Interest.

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



* = americast cable provided by Ameritech

Source. 2001 JDP&A Cable/Satellite CSI Studies

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Digital Users Have Higher Levels Of Satisfaction Than Their Analog Counterparts, Particularly Within The *Program Offerings* And *Equipment & Service Capabilities* Factors.

Digital Vs. Analog Satisfaction Index

	Analog	Digital	*Digital vs. Analog Difference*
OVERALL	*95*	*109*	[illegible]
Cost of Service	*96*	*110*	[illegible]
Credibility/Billing	*96*	*108*	[illegible]
Program Offerings	*96*	*114*	[illegible]
Equipment & Service Capabilities	*95*	*112*	[illegible]
Customer Service	*95*	*101*	[illegible]
Reception Quality	*92*	*106*	[illegible]

= Statistically significant above ANALOG at 95% confidence level
= Statistically significant below ANALOG at 95% confidence level

Source: 2001 JDP&A Cable/Satellite CSI Studies

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

+/- Difference of *Cost of Service* Attribute Scores: Digital Vs. Analog

	Analog	Digital	Digital vs. Analog Difference
Total	*96*	*110*	*+14*
Total Cost of Monthly Service	*33*	*36*	
Provides Good Value	*24*	*28*	
Cost of Adding Add'l Channels	*22*	*26*	
Initial Cost of Installation	*10*	*13*	
Cost of Adding Service to 2 or more TVs	*7*	*7*	

= Statistically significant above ANALOG at 95% confidence level
✖ = Statistically significant below ANALOG at 95% confidence level

Source: 2001 JDP&A Cable/Satellite CSI Studies

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Digital's Significantly Higher Than Analog Scores In The *Credibility/Billing* Factor Are Due In Part To A Significantly Higher Score In The "Technical Innovator Attribute.

+/- Difference of *Credibility/Billing* Attribute Scores: Digital Vs. Analog

	Analog	Digital	Digital vs. Analog Difference
Total	*96*	*108*	*+12*
Technical Innovator	*18*	*21*	
Company's Reputation	*18*	*20*	
Company's Honesty	*12*	*14*	
Active In Community	*9*	*10*	
Keeping You Informed	*8*	*9*	
Timeliness In Billing Adjustments	*7*	*7*	
Ease Of Understand Company Corresp.	*6*	*7*	
Variety Of Methods To Pay Bill	*6*	*7*	
Co. Stands Behind Service	*5*	*6*	
Accuracy of Mo. Bill	*5*	*5*	
Ease of Understand Mo. Bill	2	2	

= Statistically significant above ANALOG at 95% confidence level

✖ = Statistically significant below ANALOG at 95% confidence level

Source: 2001 JDP&A Cable/Satellite CSI Studies

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Digital Scores Significantly Above Analog In Four Of The Attributes Contributing To The *Program Offerings* Factor Including "Number Of Channels Available" And "Easy To Find Something To Watch".

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

	Analog	Digital	Digital vs. Analog Difference
Total	96	114	+18
Offers channels you like as part of "basic"	23	26	
Number of channels available	18	22	
Offers special discounts	18	20	
Easy to find something to watch	13	17	
Provides a variety of programming	13	15	
Ease of ordering "Pay-Per-View"	10	13	
Provides Local Programming	1	1	

= Statistically significant above ANALOG at 95% confidence level

= Statistically significant below ANALOG at 95% confidence level

Source: 2001 JDP&A Cable/Satellite CSI Studies

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Digital's Advantage In The *Equipment and Service Capabilities* Dimension Can Be Attributed To Strong Performances In Almost All Of The Related Attributes.

+/- Difference of *Equipment and Service Capabilities* Attribute Scores: Digital Vs. Analog

	Analog	Digital	Digital vs. Analog Difference
Total	*95*	*112*	*+17*
Offers Services You Want In Area	*33*	*40*	[redacted]
Keeps Srvc Outages to a Min.	*21*	*23*	[redacted]
Restores Srvc After Temp. Outages	*15*	*18*	[redacted]
Equipment Is Easy to Install	*14*	*16*	[redacted]
Provide Replacment/ Loaner Equip.	*12*	*15*	[redacted]

= Statistically significant above ANALOG at 95% confidence level
= Statistically significant below ANALOG at 95% confidence level

Source: 2001 JDP&A Cable/Satellite CSI Studies

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Digital's Advantage In The *Customer Service* Dimension Is Cumulative Across Most Attributes.

+/- Difference of *Customer Service* Attribute Scores: Digital Vs. Analog

	Analog	Digital	Digital vs. Analog Difference
Total	95	101	+6
Courteous Reps	9	10	
Getting Through Without Hold	10	11	
Knowledgeable Reps	9	10	
Resolve Service Issues Timely	10	10	
Promptly Makes Changes When Requested	9	10	
Thorough Info. Provided	10	10	
Responsive Reps	10	10	
User-Friendly Automated System	10	10	
Convenient Cust. Srvc. Hrs.	9	10	
Time It Takes to Reach a Rep	9	10	

= Statistically significant above ANALOG at 95% confidence level

✖ = Statistically significant below ANALOG at 95% confidence level

Source: 2001 JDP&A Cable/Satellite CSI Studies

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Digital's Advantage In The *Reception Quality* Dimension Can Be Attributed To Strong Performances In Both The "Consistently Delivers Clear Reception" And "Clarity Of Reception" Attributes.

+/- Difference of *Reception Quality* Attribute Scores: Digital Vs. Analog

	Analog	Digital	Digital vs. Analog Difference
Total	*92*	*106*	*+14*
Consistently Delivers Clear Reception	*63*	*72*	
Clarity Of Reception	*29*	*34*	

= Statistically significant above ANALOG at 95% confidence level
* = Statistically significant below ANALOG at 95% confidence level

Source: 2001 JDP&A Cable/Satellite CSI Studies

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Digital Cable Performs Significantly Below The Satellite Industry Average In Overall Satisfaction, As Well As In *Cost Of Service*, *Credibility/Billing* And *Reception Quality*.

Digital Vs. Satellite Satisfaction Index

	Digital	Satellite	Difference
OVERALL	109	115	-6 ✖
Cost of Service	110	120	-10 ✖
Credibility/Billing	108	115	-7 ✖
Program Offerings	114	118	[illegible]
Equipment & Service Capabilities	112	109	[illegible]
Customer Service	101	105	[illegible]
Reception Quality	106	120	-14 ✖

= Statistically significant above SATELLITE at 95% confidence level

✖ = Statistically significant below SATELLITE at 95% confidence level

Source: 2001 JDP&A Cable/Satellite CSI Studies

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Digital Subscribers Are Slightly Younger Than Satellite Users With Mean Yearly Incomes A Little Bit Higher Than The Analog Average.

Digital Vs.Analog Demographic Differences

	Digital Households	Analog Households	% Diff. Digital vs. Analog
Age			
Under 35	25%	16%	
35-54	48%	44%	
55+	26%	40%	
Education			
High School or less	39%	39%	
College+	61%	61%	
Income (in HH)			
Less than $35,000	41%	43%	
$35K to $50K	16%	19%	
$50K or more	44%	38%	
Mean per year (000's)	$52.3	$49.2	
Household Size			
One	21%	28%	
Two	32%	34%	
Three+	47%	37%	
Residential Location			
Urban	33%	29%	
Suburban	50%	55%	
Rural	17%	15%	

Source: 2001 JDP&A Cable/Satellite CSI Studies

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DETAILED FINDINGS

* Switching

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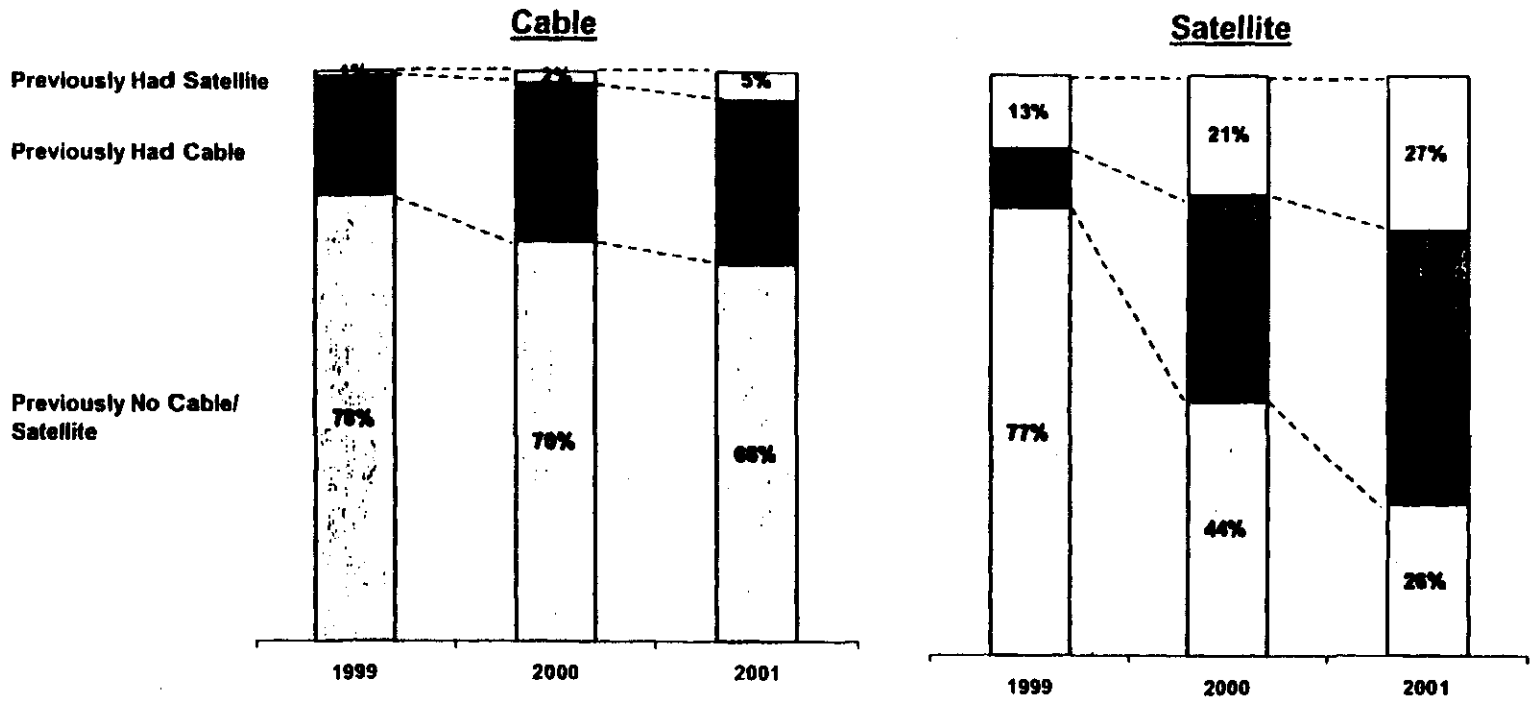
The Majority Of The Satellite Users Customer Base Is Comprised Of Former Cable Subscribers (47%).



Source: 1999-2001 JDP&A Cable/Satellite CSI Studies

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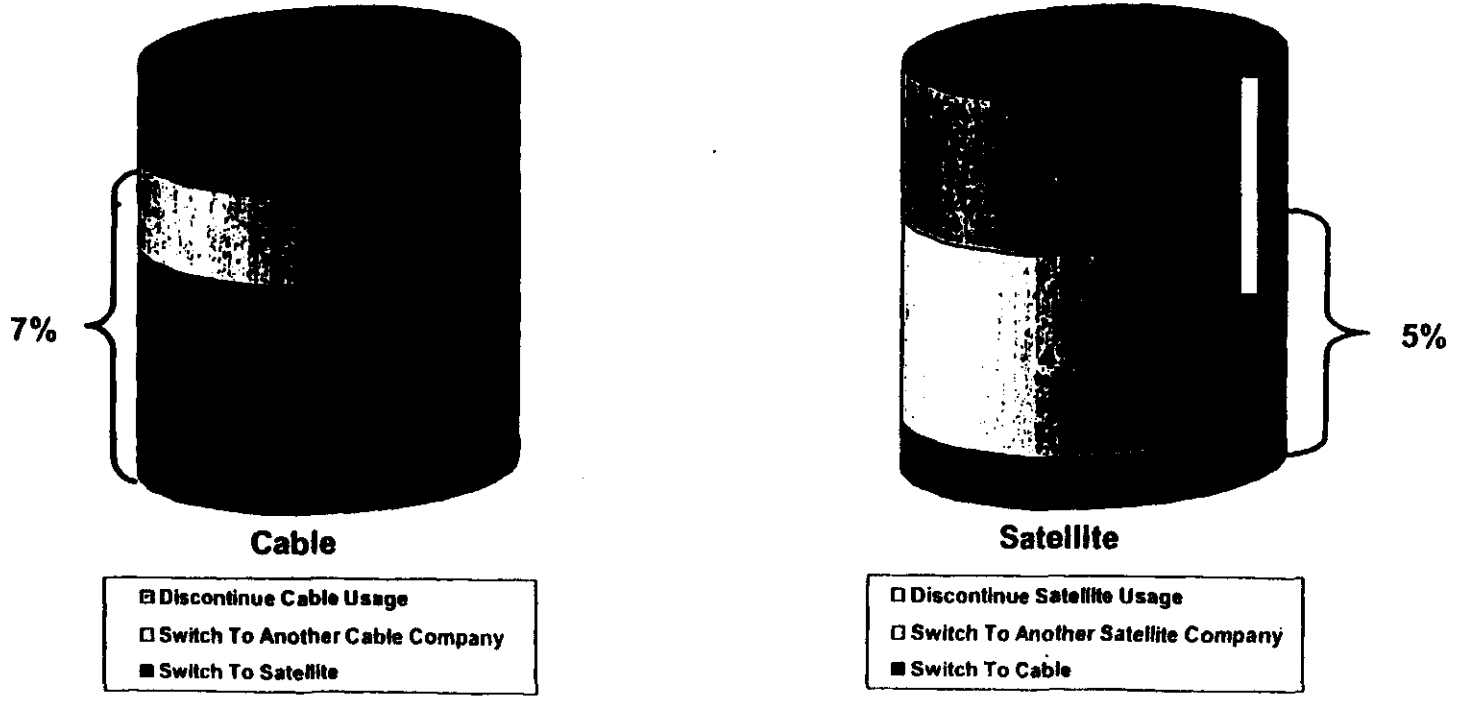
Five Times As Many Cable Subscribers Indicate A Willingness To Move To Satellite TV In The Next Year Versus Satellite Users Moving To Cable...

% Indicated Changes In The Next 12 Months



Source: 2001 JDP&A Cable/Satellite CSI Studies

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... Cablevision Customers Have The Highest Levels Of Switching Intent Among Cable Companies.

	2001 Switch to Satellite	2000 Switch to Satellite
Cablevision	7%	11%
Mediacom	6%	na
Time Warner	6%	7%
AT&T	5%	7%
Cable One	5%	6%
Charter	5%	6%
Cox	5%	8%
Ameritech*	5%	na
Adelphia	4%	9%
Comcast	4%	7%
RCN	3%	na
Insight	2%	na

* = americast cable provided by Ameritech

na = Not a covered carrier in 2000

Source: 2000-2001 JDP&A Cable/Satellite CSI Studies

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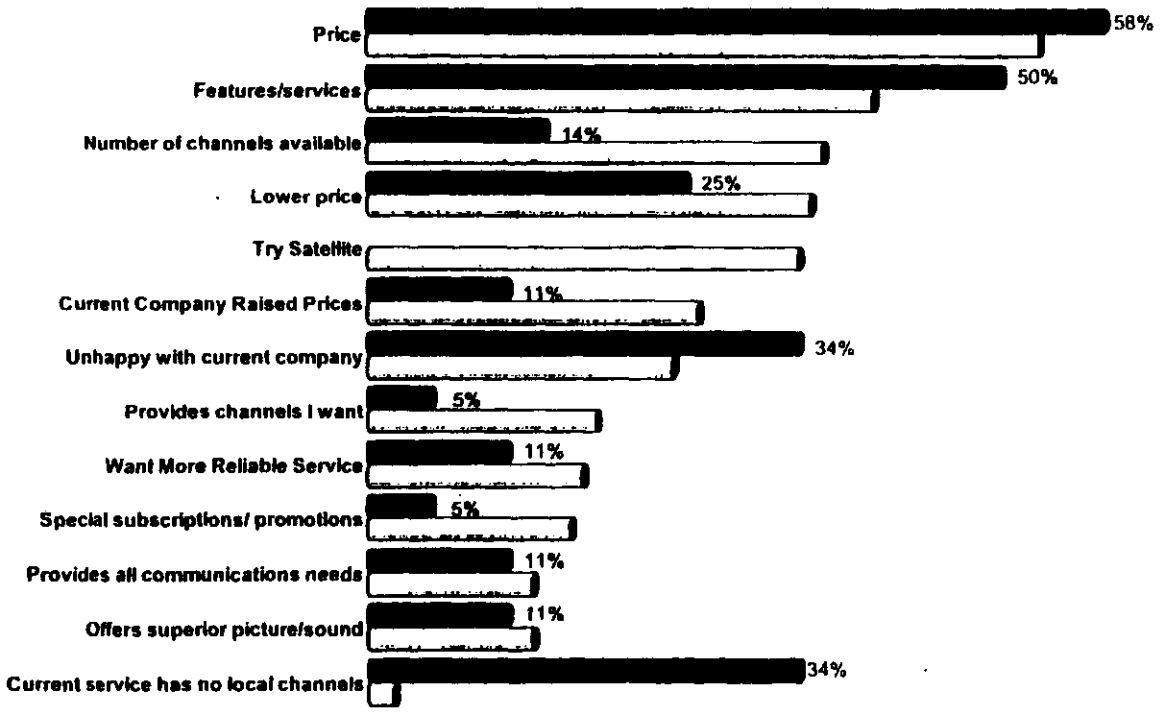
Price And A Lack Of Local Channels Within The Current Service Are The Two Reasons Satellite Users Cite Most Often For Wanting To Switch Services, While Cable Users' Biggest Concern Is Price.

% 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

Satellite Service Providers
Cable Service Providers

Source: 2001 JDP&A Cable/Satellite CSI Studies

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DETAILED FINDINGS

* Future Competitive Environment

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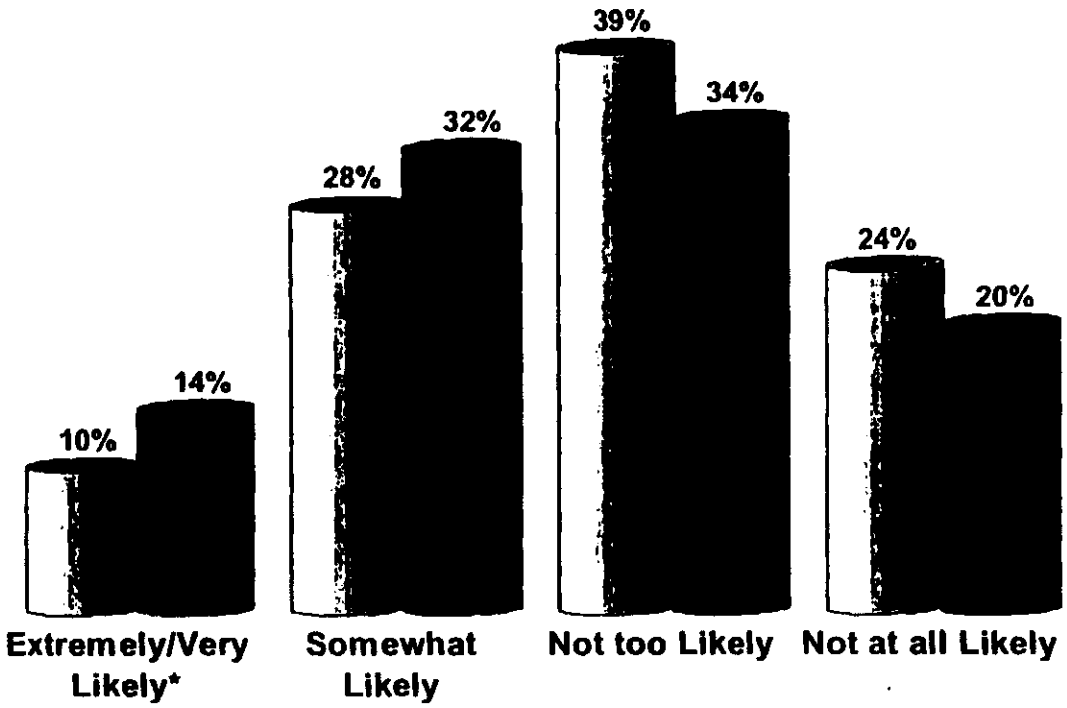
Satellite Users Are Slightly More Likely Than Cable TV Subscribers To Change To One Company For All Of Their Telecommunication Needs.

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



Satellite Service Providers
Cable Service Providers

* Not including those who report they already do bundle services

Source: 2001 JDP&A Cable/Satellite CSI Studies

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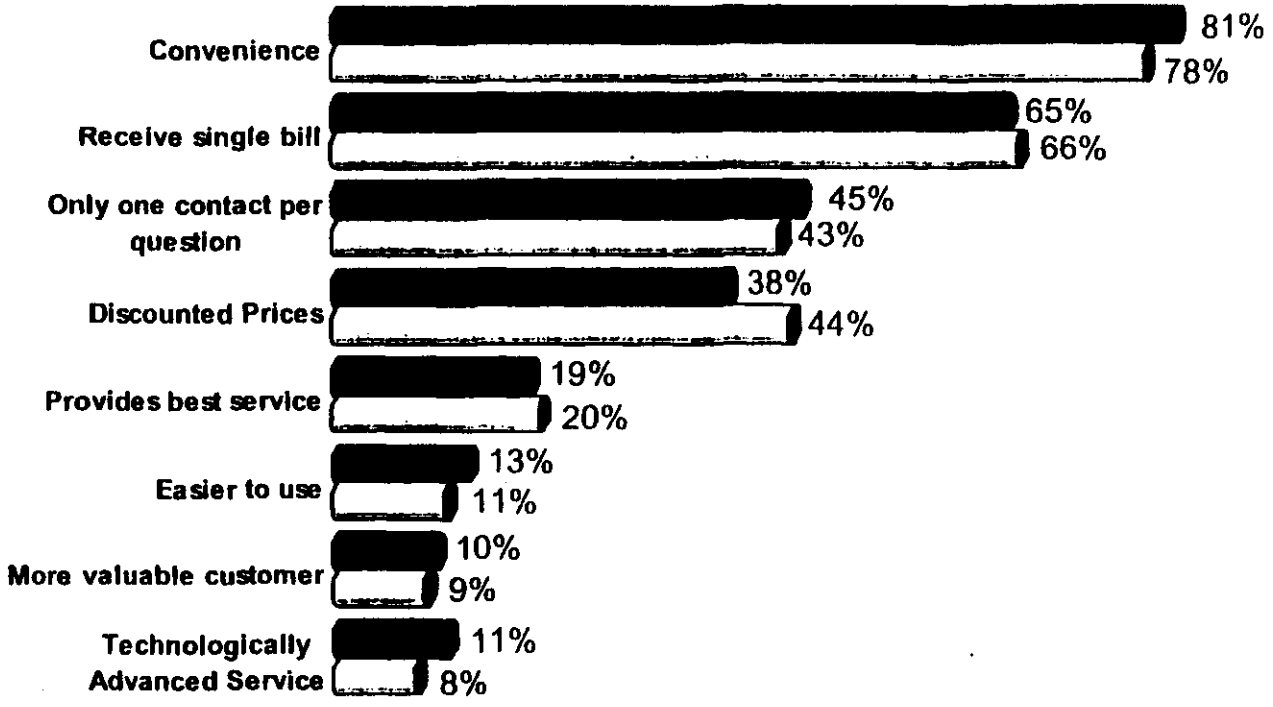
Both Satellite And Cable Users Cited Convenience As The Reason They Would Be Most Likely To Switch To One Company For All Of Their Telecommunication Needs.

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



Satellite Service Providers
Cable Service Providers

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

Source: 2001 JDP&A Cable/Satellite CSI Studies

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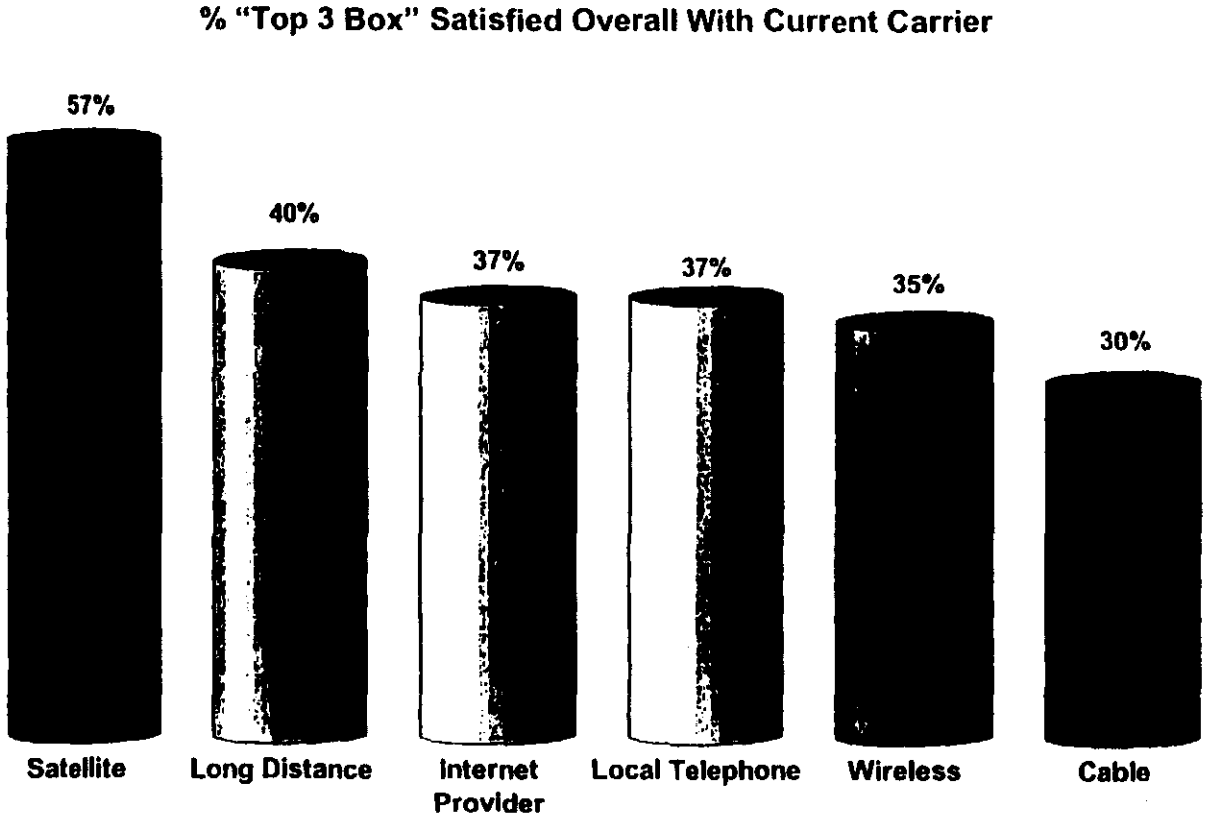
Among Cable And Satellite Users, Overall Satisfaction Is Highest For Satellite Companies And Lowest For Cable Companies.



Source: 2001 JDP&A Cable/Satellite CSI Studies

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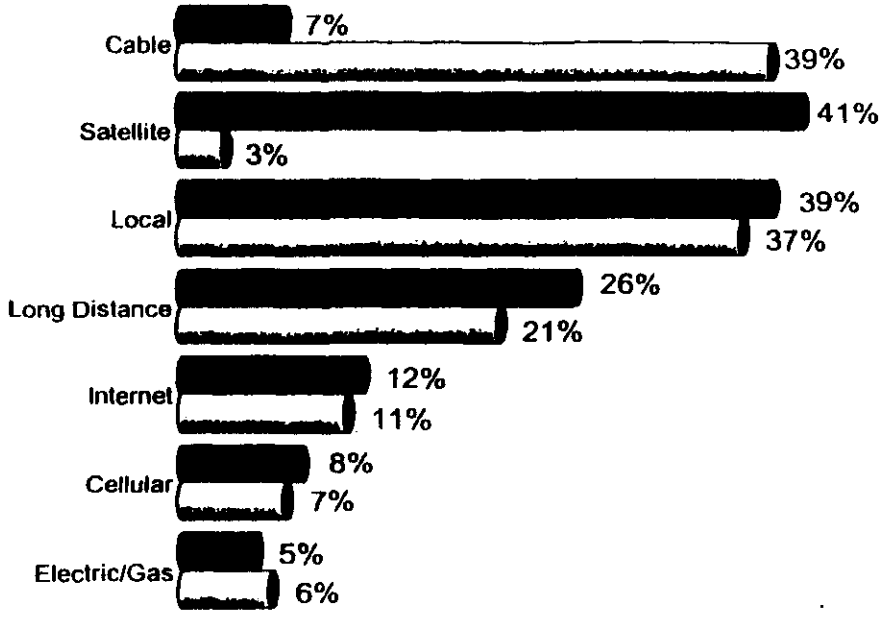
Among Cable And Satellite Users, Four In Ten Would Select Their Cable Or Satellite Companies To Provide Them With All Of Their Telecommunication Needs.

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

Satellite Service Providers
Cable Service Providers

Source: 2001 JDP&A Cable/Satellite CSI Studies

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DETAILED FINDINGS

* Usage Patterns

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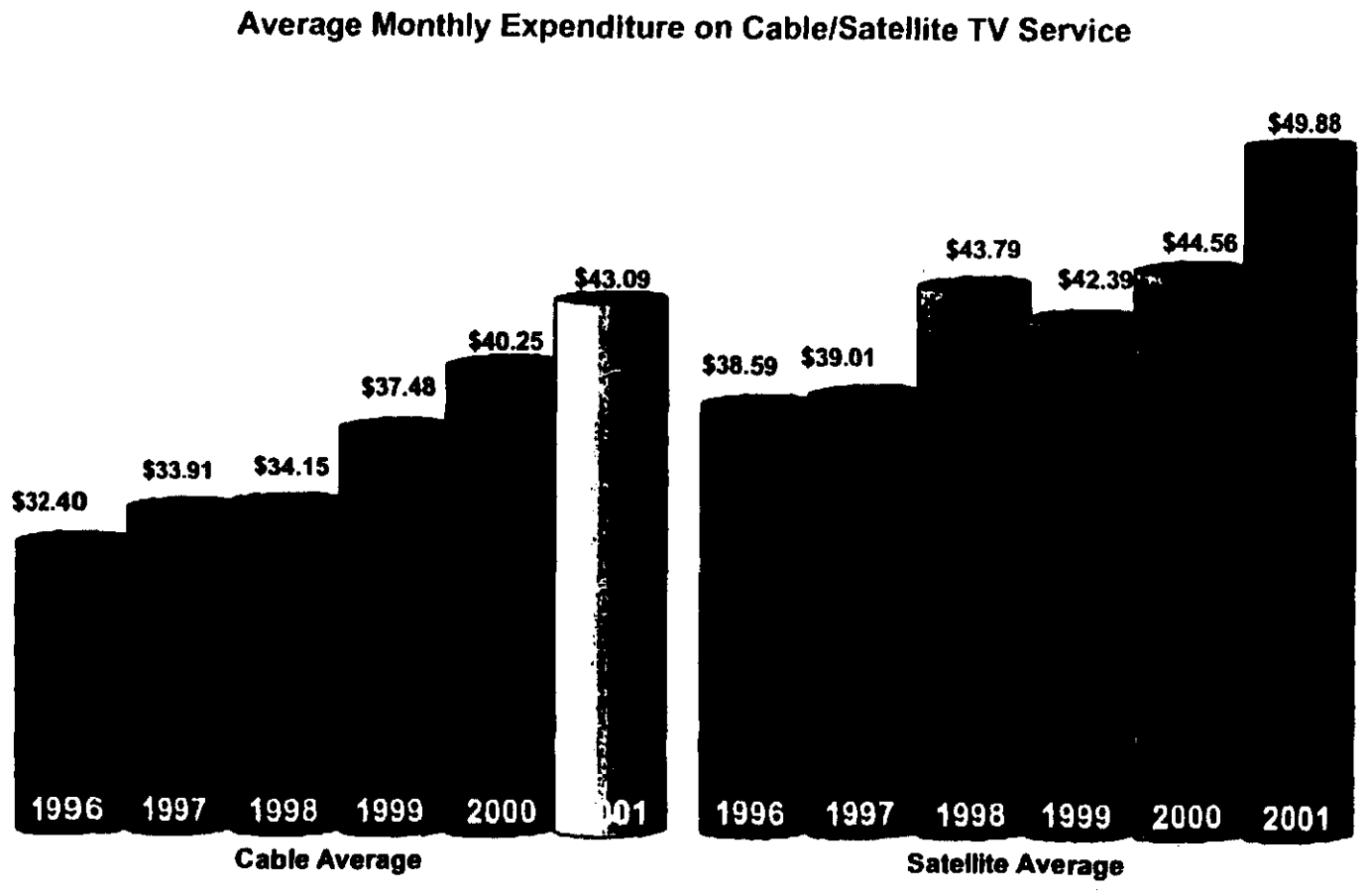
Average Monthly Expenditures Have Risen For Both Cable And Satellite Users Over Last Year's Levels.



Base: Have expenditures for cable and/or satellite service

Source: 1996-2001 JDP&A Cable/Satellite CSI Studies

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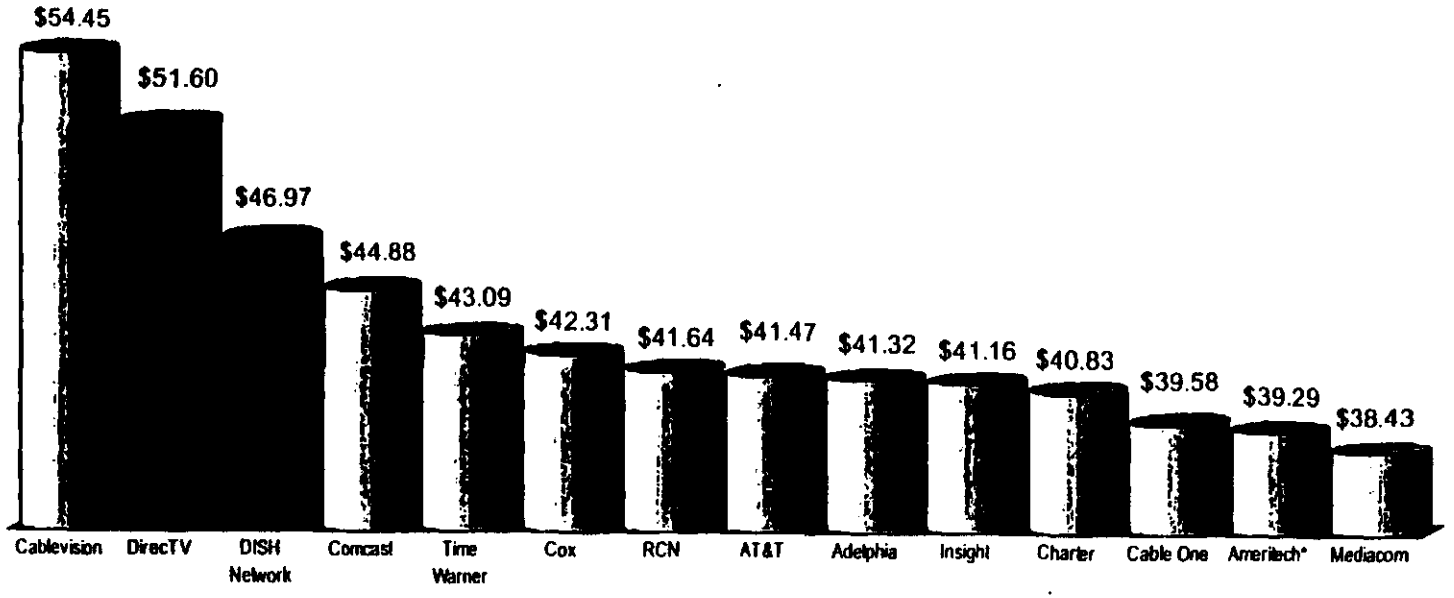
Cablevision Users Have The Highest Levels Of Monthly Expenditures, Followed By DirecTV Customers.

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



* = americast cable provided by Ameritech
Base: Have expenditures for cable and/or satellite service

Satellite Service Providers
Cable Service Providers

Source: 2001 JDP&A Cable/Satellite CSI Studies

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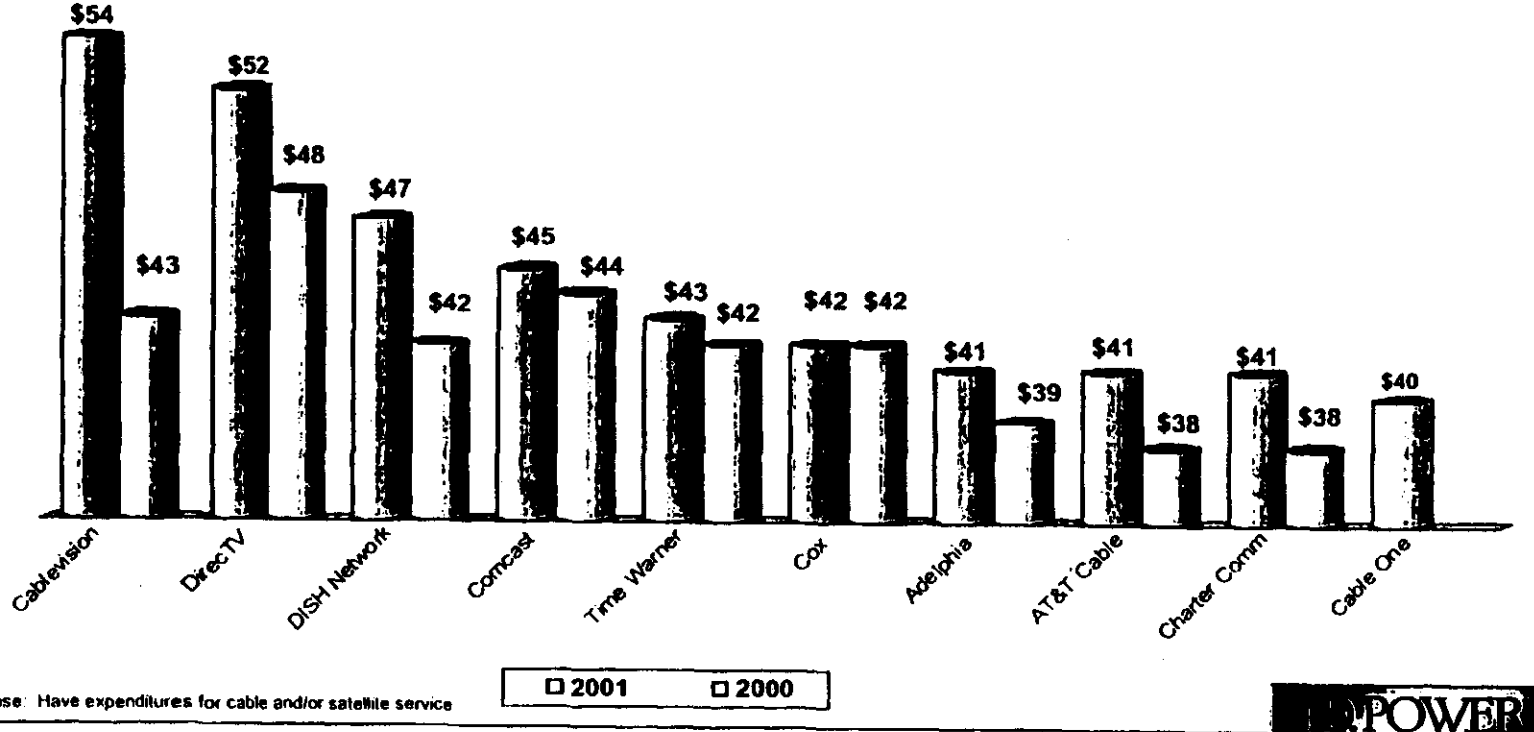
Cablevision Users Report The Highest Change In Average Monthly Expenditures Since 2000.

Comparison Of Average Monthly Expenditure on Cable/Satellite TV Service By Provider Since '00:



Base: Have expenditures for cable and/or satellite service

Source: 2000- 2001 JDP&A Cable/Satellite CSI Studies

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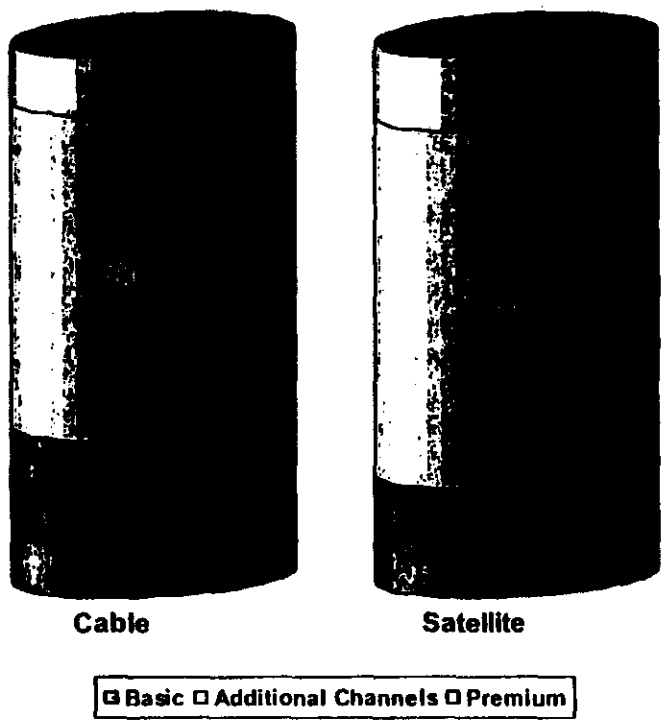
Seven Out Of Ten Cable Customers Subscribe To Additional Channels For Which They Pay More. Nearly Three Quarters Of All Satellite Subscribers Receive More Than The Basic Package.

% Service/Package Currently Subscribe To



Source: 2001 JDP&A Cable/Satellite CSI Studies

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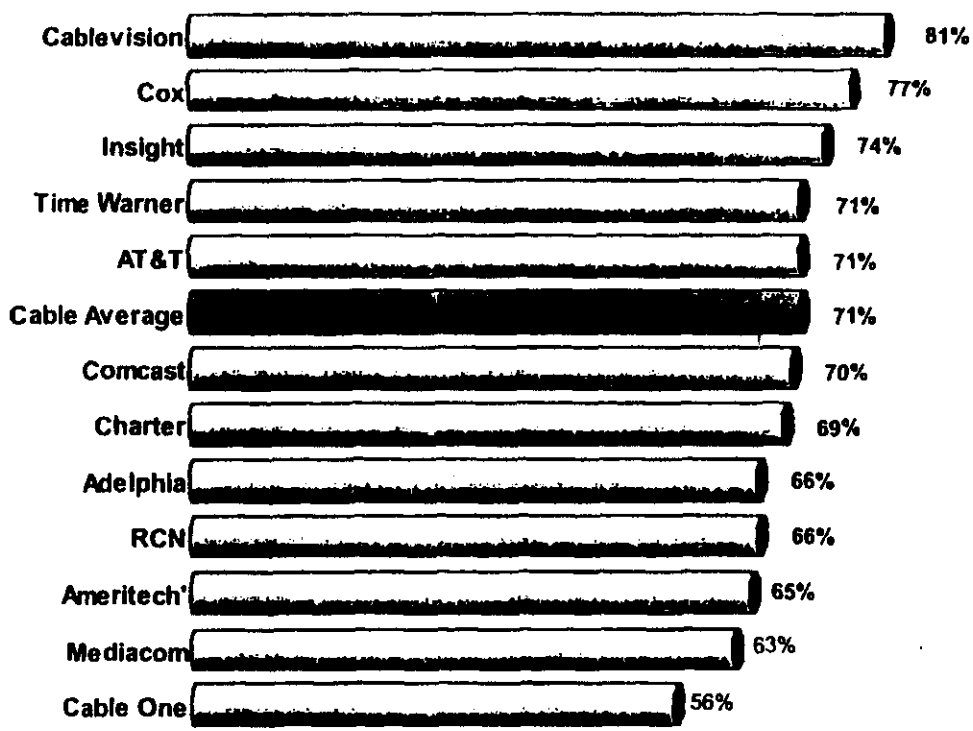
Cablevision Customers Are More Likely To Subscribe To More Than The Basic Channels. Cable One Users Have The Lowest Incidence Of Subscribing To More Than Just The Basic Channels.

% Subscribe To Basic Plus Additional and/or Premium Channels*



* = americast cable provided by Ameritech

* Base: Subscribe to cable service

Source: 2001 JDP&A Cable/Satellite CSI Studies

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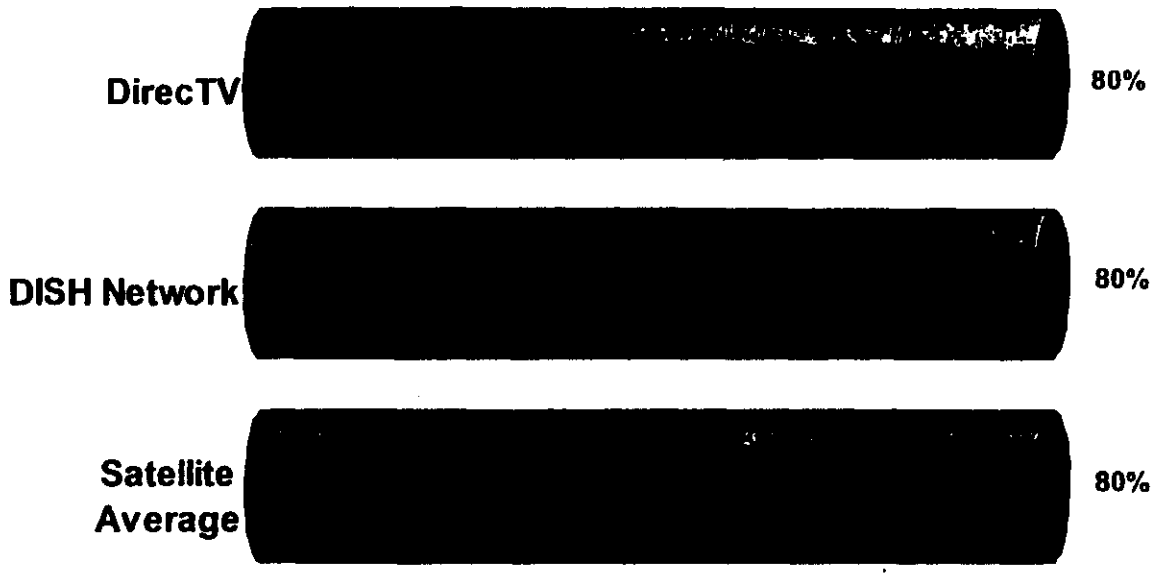
On Average, Four Out Of Five Satellite Customers Subscribe To Basic Plus Additional Channels.

% Subscribe To Basic Plus Additional and/or Premium Channels*



* Base: Subscribe to cable and/or satellite service

Source: 2001 JDP&A Cable/Satellite CSI Studies

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