



Media *Insight*

2003

Arbitron Cable Media Insight Study
for Adelphia Media Services



Table of Contents

| | |
|---|----|
| Executive Summary | 2 |
| Background | 5 |
| Objectives | 6 |
| Methodology | 7 |
| Advertisers' Perspectives on Media..... | 10 |
| Satisfaction Level with Adelphia Media Services | 17 |
| Conclusions..... | 24 |
| Recommendations..... | 30 |
| Appendix A: Charts | 33 |
| Appendix B: Verbatims | 38 |



Executive Summary

How do advertisers make media decisions? What is important to them in choosing media? How do their various media options compare? How satisfied are they with our company? Are there things we can do that will help us generate a larger share of their advertising budgets?

Those are some of the questions that Adelphia Media Services (AMS) hired Arbitron Inc. to ask Adelphia's current and churned customers across the country, with the objective of determining what advertisers value, what they think of various media options in general, and what they think of AMS in particular. The goal of the study is to identify opportunities for AMS to earn a greater share of advertising dollars spent in its markets.

Methodology

Five hundred interviews were conducted with advertising decision makers from a national sample of Adelphia Media Services' current and churned customers. Calls were conducted in July 2003, and the average interview lasted 18 minutes. Clients were asked a series of questions about media in general, without reference to Adelphia Media Services, before being asked specifically about their relationship with AMS.

Findings

Advertisers' Perspectives on Media

Overall, cable TV enjoys a high satisfaction rate (75%). It also compares favorably to all other major media, in terms of where advertisers spend their advertising budgets. When making a media decision, advertisers say "confidence in the value of their investment" and "results from past experiences with a particular medium" are most important to them.

Media Comparisons

Respondents have difficulty assigning the best and worst attributes of sales representatives from different media. When they do offer an opinion, cable TV performs well. However, churned customers consistently give cable TV lower scores than current customers.

Of the respondents who buy cable TV, only a small number (8%) say cable is not easy to buy. AMS can have the most immediate impact attending to two areas—production and sales staff issues—most often cited as being difficult, right behind "logistical buying issues."

Satisfaction with Adelphia Media Services

Sales Representatives and Management

In general, respondents are satisfied with their AMS sales representatives and express a high level of satisfaction with responsiveness to their inquiries and needs and their suggestions for using cable networks. There are however, notable levels of dissatisfaction in nearly every category measured.

As would be expected, a higher percentage of current customers are satisfied with their sales representatives than churned customers. Respondents seem somewhat ambivalent in their evaluation of AMS sales management. In fact, a large percentage had no opinion regarding AMS sales management at all.

Operations

Respondents' experiences with operations do not appear to have a strong impact on whether they do business with AMS. About half rate it as "neutral or not important." Although no area receives less than 55% satisfactory responses, the "not satisfied" scores indicated there is room for improvement. The area with the lowest percentage of satisfied current and churned respondents is "level of sales rep involvement."

Production

Only 39% of respondents say they have used AMS production services. They are most satisfied with AMS's "reasonable production schedule" (80%), and least satisfied with the "range of services available" (62%). Experiences with AMS production services have a significant impact on the decision-making processes, as nearly 70% of those advertisers who use them say they are "important" or "very important" when choosing to do future business with AMS.

Future Investment with AMS

Sixty-nine percent of respondents have no plans to change their investment in AMS over the next twelve months. Fifteen percent say they will increase it; 11% indicate that they will decrease their investment.

Respondents who plan to increase advertising with AMS most often say they plan to do so because they were pleased with the results of the schedule. Those who do not plan to change their status state fairly neutral, objective reasons, such as budget issues.

It is also worth noting that less than half say they use a ratings service to evaluate Adelphia Media Services, and only a quarter of the entire sample say they use a ratings service when deciding whether or not to use different media.

Recommendations

This study indicates that there are specific actions that Adelphia Media Services can take to differentiate itself from the other local media, grow the commitment of its existing customers, earn back the business of churned customers, and develop relationships with those who have never spent their dollars with AMS.

These recommendations are based on an analysis of the aggregate results from AMS's current and churned customers and, therefore, are applicable across the entire AMS organization. We recommend that AMS use the raw data to conduct further analyses based on specific regions, customer types and budget levels, etc., in order to fine-tune these action items.

- Organize sales, operations and production as a team that works together and is dedicated to providing excellent customer service, and market this team to advertisers.
- Investigate what behaviors are causing customers to be dissatisfied with their sales representatives, and invest in appropriate training and staff development.
- Direct sales representatives to take a more active role in the operations end of transactions.
- Establish a stronger relationship between sales managers and the advertising community.
- Differentiate Adelphia Media Services from its competitors by focusing on the services it can provide that advertisers find lacking in other media.
- Maintain contact with churned customers on a regular basis.
- Develop marketing campaigns directed at churned customers that stress the success advertisers have had with AMS and the distinct services AMS can offer.
- Make proper maintenance of customer databases a priority. More than 35% of the customer sample provided by AMS for this study was unusable.

In order for any tangible results to come from this study, however, all levels of Adelphia's Media Services staff must embrace it.



Background

In the spring of 2003, Adelphia Media Services (AMS) hired Arbitron Inc. to conduct a survey of its current and churned customers in AMS's three regions across the country—Northeast, Southeast and West.

Adelphia Media Services is the advertising sales division of Adelphia Communications. It focuses on the development of advertising and promotional opportunities through commercial insertion on national cable networks, local and regional news networks and the Internet. Adelphia Media Services has grown into an ad sales organization representing more than five million households covering more than 45 markets in more than 25 states across the U.S.

The goal of the study is to identify opportunities where AMS can increase its share of advertising dollars spent in the above regions. This management report includes a detailed analysis of the findings, specific conclusions and strategic recommendations. The information is designed to help AMS shape and prioritize its strategic plans to develop and retain current customers, reduce the number of churned customers, and turn churned customers into current customers.

In addition to this report, senior management at AMS has been provided with a Breakout Book, which reports responses to each question by the following groups:

1. Current vs. churned
2. Company type: Locally Owned Business, Ad Agency, Dealer Group
3. Region: Northeast, Southeast, West
4. Current customers for each region
5. Churned customers for each region

The raw data also are available for further custom analyses.



Objectives

The overall objective of the *Media Insight Study* is to discover what is important to the advertiser when doing business with media outlets so that Adelphia Media Services can incorporate that knowledge into strategies to grow its advertising sales revenue. This can translate into the retention and growth of current customers and the development of new business. The specific objectives of the study are to identify customer satisfaction levels and uncover opportunities for AMS.

Uncover Opportunities

This study is designed to provide first-hand information about the critical elements advertisers use when deciding which media to include in a marketing campaign. Included are such questions as: What criteria do they use when choosing media? How do advertisers perceive cable television? How does cable TV perform against other media outlets in overall satisfaction and sales staff performance?

This knowledge can then be used in every contact with an advertiser to demonstrate AMS's ability to understand customer needs and priorities, and its willingness to meet them.

Identify Customer Satisfaction Levels

This research identifies the perceptions of and the opportunities related to customer satisfaction: How do advertisers perceive Adelphia Media Services? How do they view the strengths and weaknesses of the AMS sales team? How do AMS's operations and production departments impact the customers' total experience?

The study elicits a wide range of opinions about AMS's advertising sales division by asking:

- Are Adelphia Media Services' sales representatives responsive, knowledgeable, creative, strategic thinkers who use research effectively? How do they rate against the other media sales reps?
- Are invoices and statements timely, accurate, easy to understand and detailed enough? Are questions acknowledged and resolved? Is the AMS traffic and billing staff professional? What is the satisfaction level with the AMS sales representative's involvement in this area?
- What is the quality of the commercials produced, the timeliness of production, the range of services available, and the commercial's ability to help achieve the customer's marketing objectives?



Methodology

Five hundred telephone interviews were conducted with advertising decision makers from a national sample of Adelphia Media Services' current and churned customers. The interviews were conducted in July 2003, and the average length of the interview was 18 minutes. Details of the methodology follow.

Sampling

Adelphia Media Services provided a list of contact names representing their Operations Centers. Records were divided into current and churned clients. Current clients were defined as those with at least one contract in AMS's billing system between May 2002 and May 2003, and annual billing greater than \$1,000.

Churned clients were defined as those with at least one contract in AMS's billing system between May 2001 and May 2002, and annual billing greater than \$1,000. Records lacking appropriate contact information were not included.

In addition, the following contacts were excluded from the sample frame prior to calling: clients no longer in business, those with bad debt, national/regional businesses, third-party based customers, programming-related or political advertisers. The sample was distributed across AMS's three regions—Northeast, Southeast and West—based on the number of clients within each region.

Contacts for this study represent locally owned businesses across many different industries, advertising agencies, dealer groups and other organizations.

Demographic characteristics of respondents can be found in Appendix A.

Calling

Calling occurred from July 2, 2003, to July 28, 2003. Calling attempts were made at various times throughout the business day with a minimum of eight attempts to each number. A total of 2,967 records were selected for calling. Of these, 1,897 records—or 63.9% of the original sample records—were considered usable. Unusable sample for this study included any record with a final disposition of "disconnected phone," "residential phone," "computer tone," "language barrier," "wrong number," "no answer" or anyone who indicated that they had not purchased any form of advertising in the last year.

A full description of final calling disposition can be found in Appendix A.

Interviews were completed with 500 clients, yielding a final response rate of 26.4%. Of the 500 completed interviews, 317 were completed with current clients and 183 were completed with churned clients, based on the definitions provided by Adelphia Media Services. By region, 250 interviews were completed with clients in the Northeast, 199 calls were completed with clients in the Southeast, and 51 interviews were completed in the West.

Questionnaire

Clients were asked a series of questions related to media in general including: what types of media they purchase, ease of doing business, satisfaction with the quality of service received, and satisfaction with the sales staff. Through the first half of the interview, clients were unaware that this survey was being conducted for Adelphia Media Services. After obtaining general media information, clients were then asked more specific questions about their relationship with Adelphia Media Services. This included questions that focused on the sales staff, production services, invoicing and statements, and their future investment plans with Adelphia Media Services.

Satisfaction scores in this study are based on a five-point scale in which 1 means “very dissatisfied” and 5 means “very satisfied.” Results in this report are presented based on the aggregated responses of all those interviewed. During the interview, respondents were given the option to answer “don’t know” to an item. As a result, data summaries in this report will not always add up to 100% if the “don’t know” responses are not included in the charts and tables.

Respondents were given an opportunity to respond to open-ended items, which addressed such topics as type of industry represented, why buying cable may be difficult, how personal experiences with Adelphia influence their decision to advertise, and plans for future investment. In presenting results from these items within the report, codes were assigned to each open-ended response. The codes were used to group responses based on common content. For any given chart that references an open-ended item, percentages are based on the total number of responses received for that item.

A complete list of the verbatim responses associated with open-ended items can be found in Appendix B.

Initially, clients who indicated in the survey that they had not done business with Adelphia Media Services in the past two years were not eligible to answer items specifically related to AMS. After further discussion with Adelphia Media Services, those questions were later asked of all respondents, regardless of their self-proclaimed status with AMS. As a result, however, the total number of respondents answering those AMS-specific questions is less than the number answering all other questions in the survey. Results presented in this management report and in the Breakout Book, which reference current

and churned clients, follow the labels assigned to each contact by Adelphia Media Services in generating the sample as described above.

All of the data in this report are based on the 500 completed surveys in aggregate. Any areas where there is a statistically significant difference in responses from the current vs. churned customers also are addressed.

Comprehensive results of the current, churned, Northeast, Southeast, West, and company type can be found in the complete data analysis tabulations in the Breakout Book.

Where appropriate, data from this study are compared to data obtained from Arbitron's *Media Insight 2002: A National Study of Agency Perceptions of Cable*. This national study, conducted in January 2002, interviewed senior-level decision makers at major agencies and buying services across the U.S. to ascertain their experiences with, perceptions of, and recommendations for local media. The study results were distributed to all Arbitron Cable customers in June 2002. The *Media Insight 2002* study is also available on Arbitron's Web site at www.arbitron.com.



Advertisers' Perspectives on Media

The first half of the questionnaire focuses on the bigger media picture—what media the advertisers buy, what criteria they use when choosing media, the ease of buying each medium, and their overall satisfaction with the different media options. At this point in the survey, respondents do not know that this study is being conducted on behalf of Adelphia Media Services. That information is not introduced until the second half of the survey, when questions are asked specifically about their experiences with AMS.

Eighty-three percent of the respondents work for a locally owned business, and 49% of them are business owners. The retail industry is the most represented, with 36% of the respondents coming from it. More than 60% of all respondents spend less than \$100,000 annually on advertising, 17% spend less than \$15,000, and 16% spend between \$50,000 and \$99,999.

A description of respondents' demographics can be found in Appendix A.

What Advertisers Are Buying, and Their Level of Satisfaction

When asked about the media they purchase on a regular basis, 73 percent say they buy cable TV. That is second only to newspaper (79%), and 7 points higher than radio (66%).

The national Media Insight 2002 study reported that local cable TV was purchased by 78% of respondents, newspaper by 62%, and radio topped the list of media purchased at 88%. Since this study surveyed current and former AMS customers who are primarily locally owned businesses, it is not surprising that the distribution of media purchased by this group would vary from national and regional advertising agencies.

When respondents are asked to rank each medium that they purchase by where advertising dollars are spent, cable TV's 2.2 average ranks number two, right behind newspaper. Note that the closer the number is to one, the greater percentage of dollars spent on that medium.

It is interesting to look at budget allocations by medium. Respondents with the lowest annual advertising budgets, less than \$15,000, spend more of that money on cable TV than any other media, while those with annual budgets greater than \$500,000 spend more of their advertising dollars with broadcast TV than with cable TV. Ad allocations to newspaper remain constant no matter what the size of the annual budget is.

| | <\$15K | \$15K- <\$25K | \$25K- <\$50K | \$50K- <\$100K | \$100K- <\$250K | \$250K- <\$500K | \$500K+ |
|--------------|--------|------------------|------------------|-------------------|--------------------|--------------------|---------|
| Cable TV | 1.6 | 1.8 | 2.0 | 2.3 | 2.6 | 2.5 | 3.2 |
| Broadcast TV | 2.9 | 2.7 | 2.2 | 2.3 | 2.2 | 2.5 | 1.9 |
| Radio | 2.4 | 2.0 | 2.2 | 2.1 | 2.5 | 2.6 | 3.0 |
| Newspaper | 2.1 | 2.0 | 2.2 | 2.1 | 2.1 | 2.0 | 2.3 |

Number of responses vary by budget allocation. The closer the number is to one, the greater percentage of dollars spent on that medium.

Current vs. Churned: While 41% of current customers rank cable TV number one in spending, only 21% of churned customers did. Conversely, 27% of current customers rank broadcast TV as number 1, while 45% of churned customers gave it that rank. The allocation of dollars to radio and newspaper do not vary greatly between current and churned customers.

In terms of respondents' overall satisfaction level with all media, cable TV has the highest "satisfied" score (75%), followed by radio with a score of 72%. While newspaper earns the highest percentage of purchasing and the highest rank for dollars spent, only 52% give it a satisfactory rating—the lowest score of all media mentioned in the survey.

Nearly 80% of current customers and 63% of churned customers give cable TV a "satisfied" score. Churned customers do not give any other medium a significantly higher score than current customers. However, the only medium that receives a "very dissatisfied" score in the double digits—from either current or churned customers—is cable TV. Among churned customers, 16% say they are "dissatisfied."

Cable TV Compared to the Top 5 Media

| | Purchase Regularly | Average Rank (Dollars Spent) | Satisfaction with Quality of Service | | | |
|-----------------|--------------------|------------------------------|--------------------------------------|------------|--------------|------------|
| | | | Satisfied | Neutral | Dissatisfied | N |
| Cable TV | 73% | 2.2 | 75% | 16% | 8% | 367 |
| Broadcast TV | 44% | 2.4 | 70% | 17% | 9% | 219 |
| Radio | 66% | 2.4 | 72% | 19% | 8% | 332 |
| Newspaper | 79% | 2.1 | 52% | 24% | 14% | 394 |
| Magazine | 25% | 3.3 | 50% | 27% | 7% | 123 |

N = the number of respondents who answered the question for each item.

"Don't know" % not shown.

Cable TV Compared to All Other Media Purchased

| | Purchase Regularly | Average Rank (Dollars Spent) | Satisfaction with Quality of Service | | | |
|-----------------|--------------------|------------------------------|--------------------------------------|------------|--------------|------------|
| | | | Satisfied | Neutral | Dissatisfied | N |
| Cable TV | 73% | 2.2 | 75% | 16% | 8% | 367 |
| Direct Mail | 14% | 2.9 | 57% | 24% | 4% | 70 |
| Billboards | 13% | 3.9 | 58% | 24% | 15% | 66 |
| Yellow Pages | 11% | 2.6 | 43% | 20% | 18% | 56 |
| Internet | 8% | 4.2 | 31% | 26% | 18% | 39 |
| Other | 9% | 3.1 | 49% | 21% | 9% | 43 |

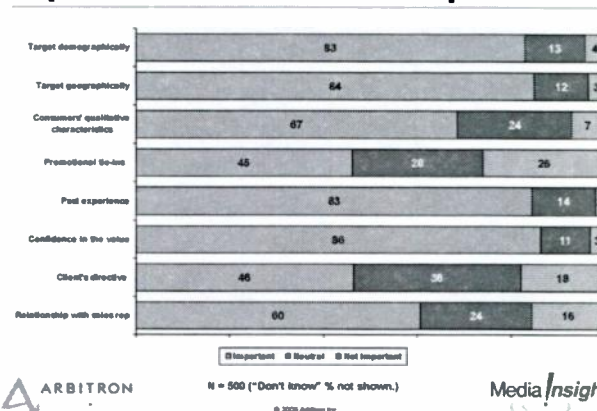
N = the number of respondents who answered the question for each item.

"Don't know" % not shown.

Critical Elements of Media Selection

We asked the respondents to rate the importance of certain attributes when deciding which media to include in their marketing plan. Of the eight listed, the attributes with the highest levels of importance assigned to it are: “confidence in the value of your investment” (86%); “ability to target geographically” (84%); “demographic targeting” and “results from past experiences” each with 83%. The attribute with the lowest rated level of importance is “whether promotional opportunities or tie-ins are included,” at 45%.

Past Experience and Value Are Important to Over 80% of Respondents



When asked about whether they use a ratings service to choose media, 73% said they do not. Not surprisingly, the only company type with a significantly higher response of “yes” is advertising agencies, with 75% saying they use a ratings service.

Current vs. Churned: Churned customers gave “geographic targeting” the same importance level as current customers (84%).

Perceptions of Cable TV Compared to Competitive Media

In order to obtain data on how cable TV sales representatives perform against their competitive media counterparts, respondents were asked to choose the Best and Worst medium for seven different attributes.

In general, respondents have a difficult time assigning a “Best/Worst” medium. The percentage of those who use the “don’t know” option is greater than 28% in all cases for “worst,” and greater than 18% in all cases for “best.” However, of those who responded to the question, cable TV is most often said to be “the Best,” or tied for “the Best” in every attribute.

| | Cable TV | | Broadcast TV | | Radio | | Newspaper | | Magazine | | Don't Know | |
|--------------------------------|----------|-------|--------------|-------|-------|-------|-----------|-------|----------|-------|------------|-------|
| | Best | Worst | Best | Worst | Best | Worst | Best | Worst | Best | Worst | Best | Worst |
| Timely Response | 27% | 16% | 11% | 8% | 19% | 10% | 21% | 25% | 4% | 9% | 19% | 32% |
| Business Knowledge | 23% | 15% | 11% | 8% | 23% | 12% | 20% | 29% | 6% | 8% | 18% | 28% |
| Recommending Changes | 24% | 15% | 11% | 7% | 24% | 10% | 15% | 28% | 2% | 7% | 25% | 33% |
| Offering Research | 29% | 13% | 14% | 4% | 23% | 10% | 12% | 33% | 4% | 8% | 18% | 31% |
| Clear Explanations | 25% | 16% | 13% | 8% | 17% | 15% | 22% | 25% | 4% | 5% | 18% | 31% |
| Quality of Marketing Materials | 31% | 13% | 16% | 5% | 15% | 13% | 15% | 33% | 5% | 7% | 18% | 28% |
| Handling of Make-goods | 25% | 13% | 14% | 5% | 20% | 11% | 12% | 26% | 2% | 7% | 27% | 38% |

Current vs. Churned: Not surprisingly, for all of the seven attributes listed, churned customers give cable TV a lower score than current customers do. With the exception of make-goods, all are significantly lower than current customers. Churned customers also give radio higher scores in handling of make-goods (26% “best” vs. 17% “best”), offering compelling research (30% “best” vs. 19% “best”), and timely response to inquiries (24% “best” vs. 16% “best”) than current customers do.

Ease of Buying Media

Respondents were asked to indicate their perception of the level of ease in purchasing all media.

Among those who actually buy the media being evaluated, cable TV and radio each have 77% scoring it as “easy” to purchase, close to the 79% who rate newspaper as easy to buy.

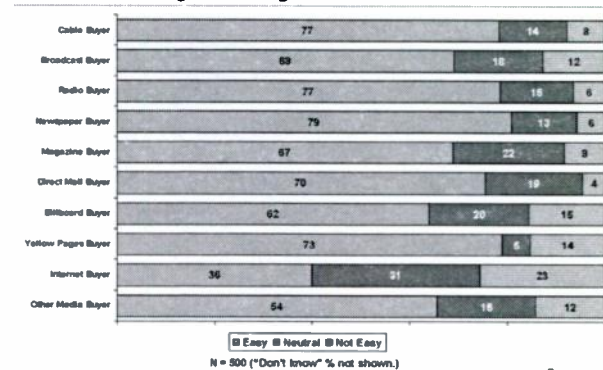
In all cases, nonbuyers of a medium rate it as more difficult than buyers—suggesting either that the medium is difficult to buy so they stopped buying it, or the perception is more difficult than the actual execution. For example, 77% of the cable TV buyers rate it as easy, but 50% of noncable TV buyers do so. For broadcast TV, the buyer to nonbuyer spread is even greater, 68% vs. 28%.

Of the small group of respondents (45 or 8%) who note that buying cable TV is not easy, the top reason (24%) is “logistical buying issues,” followed by “production issues” and “sales staff issues” at 22% and 20% respectively.

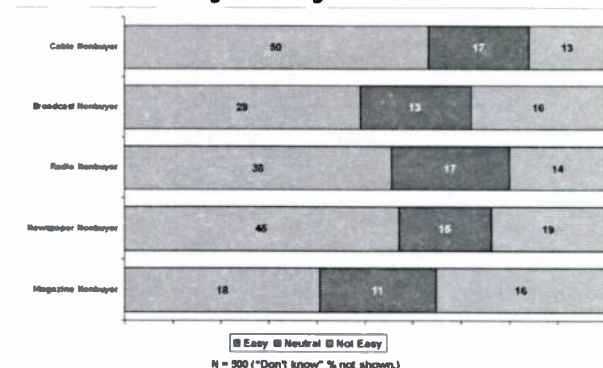
This is quite different from the results of the national Media Insight 2002 study, where 55% of respondents felt that buying local cable TV is not easy. Their main reasons were “more consolidation needed” (52%), “lack of ratings data” (41%) and “talent issues” (19%). Given that this national study surveyed senior-level agency decision makers who are not executing and planning buys on a daily basis, this perception could be an old one, but one that does not die easily.

Current vs. Churned: Nearly 80% of current customers say it is easy to buy cable TV versus 55% of churned customers. Churned customers, however, do not give any other medium significantly higher scores for ease of buying, versus the current customers' scores.

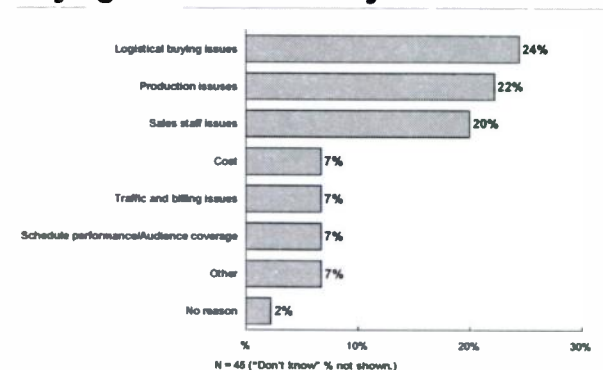
More Than 75% of Cable TV Buyers Rate It Easy to Buy



Only 50% of Noncable Buyers Rate Cable TV Easy to Buy



Logistical Issues Is #1 Reason Why Buying Cable Is Not Easy



Select Verbatims for Why Buying Cable TV Is Not Easy

It's harder to get accurate research.

The ads take a while to run and it's too expensive. It's hard to get our ads run properly.

It's much more complex because there are so many more options and the production is such a big concern. It's just much more difficult.

Simply location of salesperson. They are located out of town and it's difficult to reach or contact them.

The complete verbatim responses to this question can be found in Appendix B.



Satisfaction Level with Adelphia Media Services

The second half of the survey focuses on the satisfaction level with Adelphia Media Services in particular. We asked about the strengths and weaknesses of the sales staff, clients' experience with operations, and their attitudes toward production.

As stated in the Methodology section of this document, only the respondents who said they had done business with AMS in the past two years (current or churned) initially were asked the questions about their experiences with AMS. Although those questions were given to ALL respondents later in the fielding of the study, the final number of respondents who were posed these questions is 443 out of the 500 total respondents. Also note that AMS's definition of current and churned customers is used in this report.

When asked about whether they use a ratings service to evaluate Adelphia Media Services, only 38% say they do. Interestingly, 25% of total respondents say they use a ratings service when choosing whether or not to use different media. Therefore, ratings usage is slightly higher when evaluating AMS than media in general. Further, only 54% of the advertising agency respondents say they use ratings data to evaluate AMS, versus 75% of them who use a rating service, in general, to choose to use/not use different media. This seems to indicate that, for this group, the converse is true: their ratings usage is higher for media in general than for AMS.

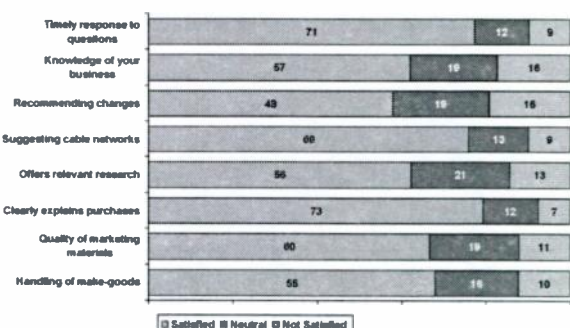
An analysis of ratings usage can be found in Appendix A

Level of Satisfaction with AMS Sales Representatives

Advertisers were asked about their satisfaction level with Adelphia Media Services' sales representatives, using the same attributes given to respondents to rate all media as "Best/Worst." The attribute with the highest "satisfied" score of 73% is "clearly explains what was purchased," followed by "timely response to questions" (71%) and "suggesting cable networks you may not have originally considered" (69%).

The areas with the lowest percentage of "satisfied" are "recommending schedule changes if the campaign is not performing up to expectations" (48%), "offers compelling and relevant research" (55%) and "knowledge about your business" (57%).

Sales Rep's Clear Explanations Receive Highest Satisfaction Scores



N = 443 ("Don't know" % not shown)

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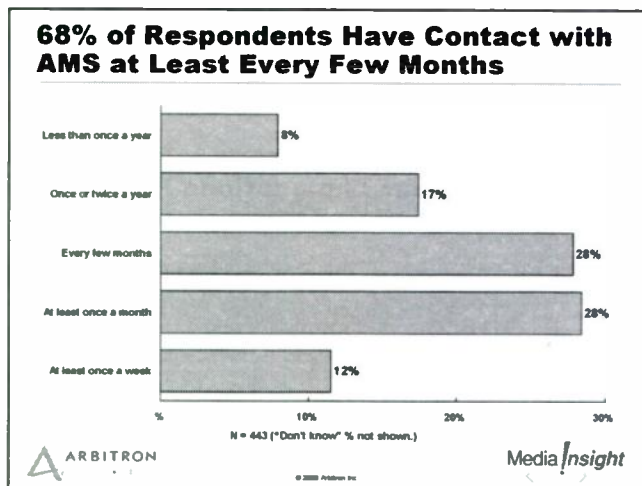
© 2003 Arbitron Inc.

The items with the highest “dissatisfied” scores (16% each) are “knowledge of your business” and “recommending schedule changes.” Three other areas have “dissatisfied” percentages in the double digits: “offering relevant research” (13%), “quality of marketing materials” (11%) and “handling of make-goods” (10%).

Note that the “handling of make-goods” received the highest percentage of “don’t know” responses; 20% of all respondents. (See *Breakout Book*.)

Current vs. Churned: In general, churned customers are less satisfied with Adelphia Media Services sales representatives, although the majority of the responses are still in the “satisfied” range. However, two areas receive particularly higher “dissatisfied” scores from churned customers: “recommending scheduling changes” (22% churned vs. 14% current) and “offering compelling research” (21% churned vs. 10% current).

Similar attributes were asked about cable TV sales representatives in general in the national 2002 Media Insight study. While 56% of the AMS respondents are satisfied with their sales representatives offering relevant research, only 19% in the national study think that cable account executives (AE) use research effectively, and only 36% think they understand research. Thirty-five percent in the national study think cable AEs understand and address their needs, whereas 57% of the respondents in this study who think that AMS sales representatives have knowledge of the advertiser’s business.



Satisfaction with Amount of Contact with AMS Sales Representative

When asked how often their AMS sales representative contacts them, the majority of respondents say either “every few months” (28%) or “at least once a month” (28%) and 80% agree that the current amount of contact is “just right” for them.

Current vs. Churned: When we look at the level of contact for the churned customers, the responses are different. For example, the categories that churned customers chose most often for frequency

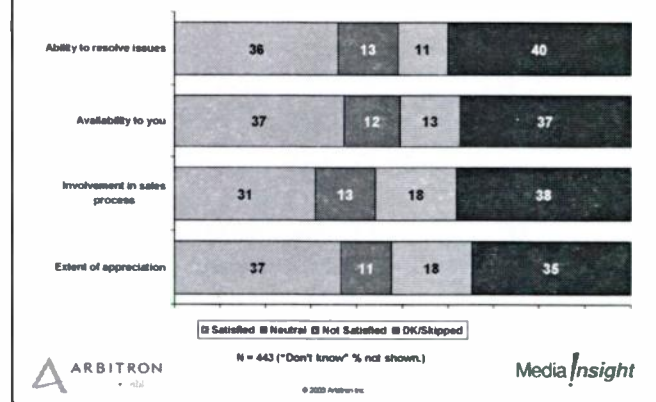
of contact with an AMS sales rep are “every few months” or “twice a year,” each receiving 27%. When asked if the current level of contact is “about right,” 76% of the churned customers say yes.

| Contact Frequency Preference | Total | Current | Churned |
|------------------------------|---------|---------|---------|
| | N = 443 | N = 309 | N = 134 |
| More Frequently | 11% | 11% | 12% |
| Less Frequently | 3% | 2% | 5% |
| Current Contact About Right | 80% | 82% | 76% |
| Don't Know | 6% | 5% | 8% |

Satisfaction with AMS Sales Management

When asked their level of satisfaction with AMS sales management in four areas, respondents consistently choose “don’t know” more often than they answer with the 1-5 scale of satisfaction. When they do answer the question, the majority are “satisfied.” However, 18% are “dissatisfied” with both “involvement in sales process” and “extent of appreciation shown.”

High Percentage of Respondents Have No Opinion on AMS Sales Management

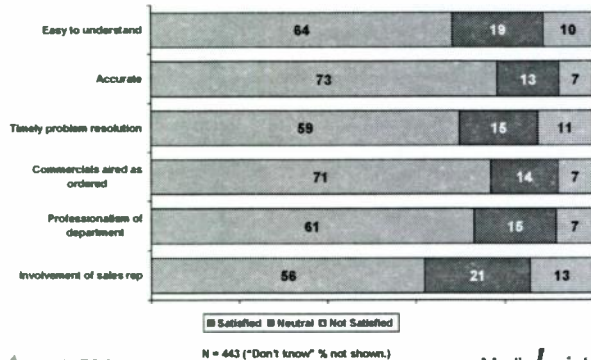


Current vs. Churned: Churned customers responded with lower satisfaction scores for every item asked. For example, “their ability to resolve issues” had the widest gap with 41% of the current customers being “satisfied” and only 25% of the churned customers “satisfied.” (Likewise, 40% of current customers are “satisfied” with the availability of sales management vs. 29% of churned, and 25% of current customers are “very satisfied,” versus 13% of churned customers.

Further, except for the “extent of appreciation shown for their business,” all of the areas show significantly higher dissatisfaction scores from churned customers than from current customers.

| | Current | | | | Churned | | | |
|---|-----------|---------|--------------|------------|-----------|---------|--------------|------------|
| | Satisfied | Neutral | Dissatisfied | Don't Know | Satisfied | Neutral | Dissatisfied | Don't Know |
| Ability to resolve issues | 41% | 11% | 8% | 40% | 25% | 16% | 17% | 42% |
| Availability to you | 41% | 11% | 12% | 37% | 29% | 16% | 17% | 38% |
| Level of involvement in the sales process | 33% | 14% | 17% | 37% | 25% | 13% | 22% | 40% |
| Extent to which they show appreciation for business | 40% | 11% | 16% | 33% | 28% | 10% | 22% | 39% |

AMS Earns High Marks for Accuracy and Ease of Understanding Statements



Satisfaction with Operations

Adelphia Media Services wanted to learn about their customers' experiences with the operations department and how those experiences impact the advertisers' total experience with AMS.

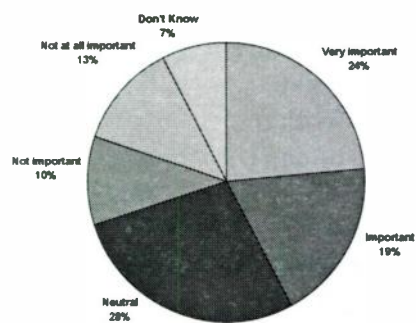
Eighty-three percent of the respondents indicate that they are the person who sees the invoices and statements from AMS.

More than 50% of them are satisfied on every attribute, with "accuracy of invoices" receiving the highest score of 73% "satisfied."

"Level of involvement of sales rep" received the lowest satisfaction score (56%), with 13% "dissatisfied." "Timely problem resolution" also received a double-digit "dissatisfied" score of 11%.

Current vs. Churned: Even though the majority of the churned customers are satisfied, their level of satisfaction is not as high as the current customers in all areas, except for "commercials airing as ordered."

Traffic and Billing Has Little Relevance on Future Investment Decisions



How Experiences with Operations Influence Future Investments with AMS

When asked how important their experiences with the AMS traffic and billing department are in making decisions to do business with Adelphia Media Services, only 24% say it is "very important" and 19% find it "important." Whereas, 50% say it is "not important," "not important at all" or "don't have an opinion."

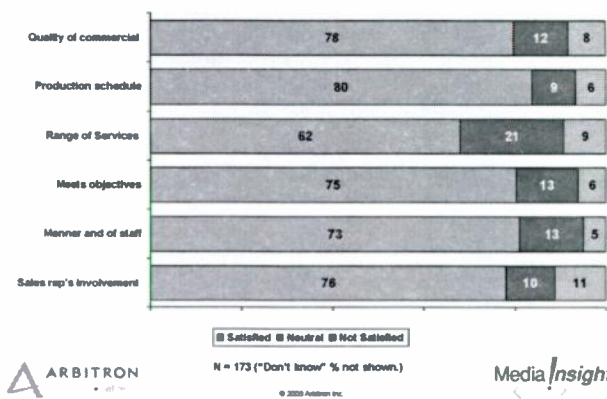
Current vs. Churned: Interestingly, while the churned customers are not as satisfied with AMS in this area as the current customers are, their response to how their experience with traffic and billing impacts their decision to do business with AMS is consistent with the current customers' response.

Satisfaction with Production

Adelphia Media Services also wanted to learn about their customers' experiences with the production department.

Only 39% of the respondents say they have used AMS's production services, and all of them are from locally owned businesses and dealer groups. When asked about their level of satisfaction with the production department in six areas, the only areas that received a satisfaction score lower than 75% were "offering a wide range of services" (62%) and "manner and appearance of staff" (73%). As was found with operations, there is some dissatisfaction with the sales representative's involvement in the process (11%).

Range of Production Services Receives Lowest Level of Satisfaction Scores



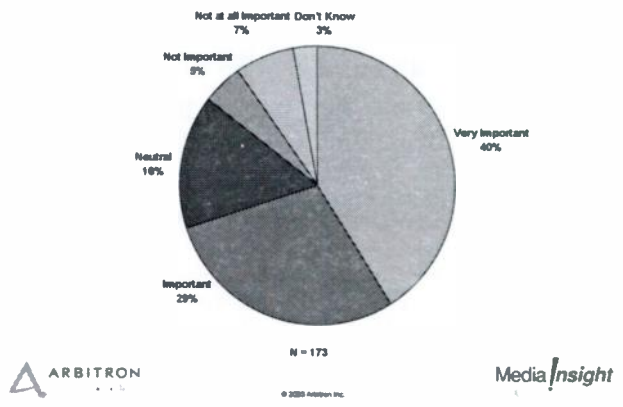
Current vs. Churned: The only area where the churned customers were less satisfied than the current customers with the "quality of commercial produced" (67% churned satisfied vs. 83% current satisfied).

How Experiences with Production Influence Future Investments with AMS

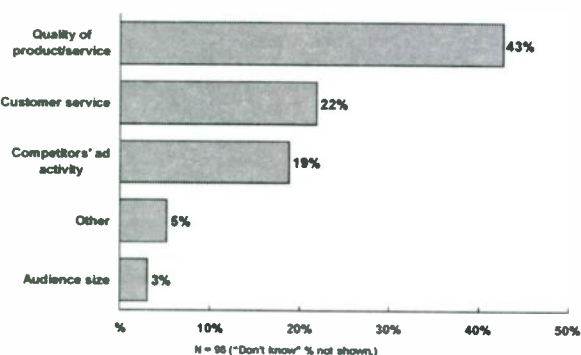
Of the 173 who say they use AMS's production services, nearly 70% say that their experiences with this department are "important" when choosing to do future business with Adelphia. There is clearly a stronger feeling towards production than traffic and billing.

Current vs. Churned: In fact, 46% of the current customers who answered the question gave it a "very important," and 31 percent of the churned customers who answered also say it is "very important."

Majority Say Experiences with Production Impacts Future Investment Decisions



Quality of Adelphia's Products/Services Has Biggest Influence on Advertisers



at home" (43%), "customer service" (22%), and "competitive advertiser activity" (19%).

Verbatim responses to this question are in Appendix B.

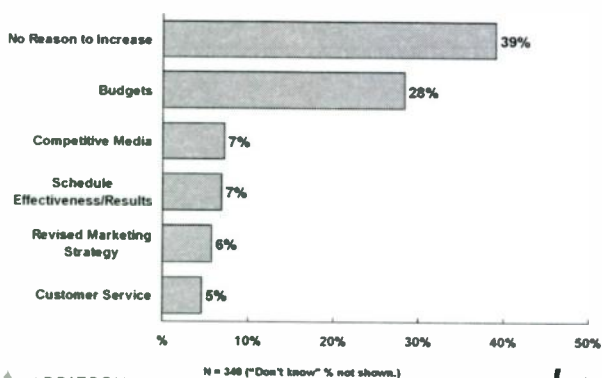
High-Speed Internet Service Provider at Work

In addition to learning about at-home services, AMS took advantage of the survey to learn more about their customers' Internet Service Provider at their place of business. Respondents were asked the name of their high-speed Internet provider and their level of satisfaction with the service.

Fifty percent of respondents say they have high-speed Internet access at work, and of those, 13% subscribe to Adelphia's Pipeline. The level of satisfaction with their current provider was very high, with only 8% expressing any dissatisfaction.

For a list of the Internet Service Providers at work, see Appendix A.

Primary Reasons Level of Investment With Adelphia Will Stay the Same



(33%). The next most frequently cited reasons are "revised marketing strategy" (30%) and "budget issues" (19%).

The Influence of Experiences with Adelphia Products in the Home

Adelphia Media Services also wanted to discover if the respondents' experience as a consumer of Adelphia services in their homes impacts their decision to do business with AMS.

Nineteen percent of those interviewed say their personal experiences with Adelphia products in the home influences their decision to advertise with AMS. The reasons they cite in this open-ended question are "quality of products/services

Future Investment Plans with Adelphia Media Services

When asked whether their company's investment in AMS will increase, decrease, or stay the same over the next 12 months, 69% say it will stay the same. The main reason cited is "no reason to increase," 39%. The second most common response is "budget issues" at 28%.

Fifteen percent say their investment will increase, citing "schedule effectiveness and/or results" as their primary reason

Eleven percent say their investment with AMS will decrease over the next twelve months. They cite “revised marketing strategy” and “customer service issues” as their main reasons (27% each), followed by “budget issues” (22%), and “schedule effectiveness/results” (15%).

When asked what they need in order to justify an increase in AMS, 34% cite “budget issues,” 13% say “nothing” (13%), and 12% refer to “effectiveness of schedule.” Rates, service, audience size, and “not interested” are the other reasons cited.

Select Verbatims for Why Their Investment Will Increase

We get good results from them.

I think cable TV is a viable medium.

We got great results from advertising. If the results are there we will keep giving the money.

We're going to do better in sales, because of the advertising with Adelphia.

I am happy with what I am doing...I think the cable advertising that we have been doing with them has been good and we have gotten really good responses from it.

Select Verbatims for Why Their Investment Will Decrease

I'm pretty content working with the radio people. They're giving me thousands of dollars in promotions. I like their perks.

I don't believe the person who sells me the product works hard enough to satisfy me and my needs. I want things because I am paying. The service when you call with a problem is not good. My experience over a couple of years has not been that great.

I'm not hearing a lot of feedback in my advertising.

I'm just not really convinced they are that good. We are asking everyone that comes in here if they are seeing the ads. I think they randomly put you out there, but it's not what I want...

Verbatim responses to this question can be found in Appendix B



Conclusions

Given that this Media Insight study reflects the opinions of Adelphia Media Services' current and churned customers, it is not surprising that 73% regularly purchase cable TV. In fact, cable is purchased by these respondents nearly as often as newspaper (79%).

Advertisers' Perspectives on Media

Overall, cable TV enjoys a high satisfaction rate of 75%, and cable received the highest percentage of satisfied responses out of all media addressed in this research. Even 63% of churned customers are satisfied with cable. Interestingly, while 79% of respondents purchase newspaper advertising, only 52% say they are satisfied with that medium.

It is worth noting that, on average, the allocation of advertising dollars is spread almost equally among cable TV, broadcast TV, radio and newspaper. Keep in mind that budget allocations by medium do vary as advertising budgets increase, with the share allocated to cable TV decreasing as spending levels increase.

While broadcast TV is only purchased by 44% of the respondents, it still receives about the same rank in dollars spent (2.1) as cable TV, radio and newspaper.

When we consider how churned customers spend their advertising dollars, 45% of them give broadcast TV a rank of number 1.

Based on this analysis of the aggregate results from Adelphia Media Services' customers, cable TV is in a strong position with its high satisfaction level and competitive share of advertising dollars. These respondents already are giving cable TV a solid percentage of their budgets. Now is the time to capitalize on this receptivity and embrace the specific findings of this study, to turn opportunities into dollars. We also recommend that AMS use the raw data to conduct further analysis based on specific regions, customer types and budget levels, etc.

Critical Elements to Consider

It is clear that advertisers need to feel their money is being well spent. The high level of importance that respondents place on "confidence in the value of their investment" (86%) and "results from their past experiences with a particular medium" (83%) indicates the need for AMS to demonstrate how doing business with them will provide a return on their investment. This can be accomplished by the placement of effective schedules by sales professionals who understand the advertiser's unique needs and how the strengths of cable TV can help meet these goals.

With more than half of the respondents saying demographic and geographic targeting is “very important” (54% and 55%, respectively), it is also important to reinforce with advertisers the obvious strengths of cable TV.

Best/Worst Attributes of Different Media Sales

Representatives

When respondents were asked to rate the best and worst attributes of media sales representatives, they did not know at this point that the survey was being conducted on behalf of AMS. Thus, these ratings can be viewed as objective opinions of each medium.

Many respondents found it challenging to assign the best and worst attributes of sales representatives. Almost 30% say “don’t know” in all cases for “worst,” and almost 20% say “don’t know” in all cases for “best.” When respondents do offer an opinion, cable TV performs well. It receives or ties for “best” in all areas. It is worth noting that “handling of make-goods” has the highest percentage of “don’t know” responses.

Current vs. Churned: In all areas, churned customers give cable TV somewhat lower scores than the current customers. In particular, churned customers gave radio significantly higher scores than current customers did for “handling of make-goods” (26% churned vs. 17% current), “offering compelling research” (30% vs. 19%), and “timely response to needs” (24% vs. 16%).

In summary, the issue of best and worst medium is not a polarizing one to a large percentage of respondents. When they do have an opinion, cable TV is the best or ties for best. Churned customers are less satisfied with cable TV, which opens the door for other media to gain those advertising dollars.

Ease of Buying Different Media

In general, the respondents do not perceive buying cable TV as any more difficult or easier than any other medium. Only 8% consider buying cable TV difficult, and their primary reason—logistical buying issues—is one that the industry as a whole has been committed to improving over the past several years.

The areas where AMS can have the most immediate impact to improve the ease of buying cable are in the second- and third-most-mentioned reasons: production (22%) and sales staff issues (20%). Those who cite production issues reference the amount of time involved in producing commercials and the perceived value of what they get for their time and money. Some of the comments specific to sales staff issues are that the advertiser doesn’t know whom to contact. They also say that cable TV reps are not professional, are poorly managed and lack the knowledge and sophistication found among other media reps.

Fortunately, among these respondents, there is not a widespread belief that buying cable TV is difficult. However, it is worth noting that among the most frequently mentioned reasons for those who do find it difficult to buy are those that relate to core parts of the business—sales and production. It appears there is an opportunity for AMS to make the production process as stress-free as possible and focus on the sales staff's accessibility and professionalism in all contacts with advertisers.

Satisfaction Level with Adelphia Media Services

When respondents were specifically asked about their level of satisfaction with AMS, the differences in opinions between the current and churned customers become even more obvious.

Influence of the Parent Company

Of those who say that the Adelphia services they receive in their homes impact their decision to advertise with AMS, “quality of service” was the most frequently cited reason for being dissatisfied (43%), followed by “customer service” (22%).

The data indicate that although only a small percentage of total respondents are influenced by their own experiences as consumers, it is important that the messages and actions of Adelphia are in sync with those of AMS. There needs to be a recognition throughout the entire company of the importance of delivering consistently high quality of service to all customers.

Satisfaction with AMS Sales Representatives

Respondents were asked to rate their satisfaction with AMS sales representatives on eight attributes. The highest “satisfied” score of 73% was received for “clearly explains what was purchased.” The other attributes that receive the next highest satisfied percentages are “timely response to inquiries and needs” (71%) and “suggesting cable networks” (69%). Further, more current customers consider themselves “very satisfied” with every attribute than just “satisfied.”

Even so, five out of the eight attributes received a “dissatisfied” score in the double digits. The areas that receive some of the highest percentages of dissatisfaction are the ones that require more strategic thought from the AMS sales rep, including “knowledge of their business” (16%), “recommending changes throughout the campaign” (16%), and “offering relevant research” (13%). “Quality of marketing materials” and “handling of make-goods” respectively received 11% and 10% “dissatisfied” responses.

Current vs. Churned: As would be expected a higher percentage of current customers are satisfied on all attributes than churned customers. Further, less

than 50% of churned customers are satisfied in four out of the eight areas discussed, and more than 20% are dissatisfied in three areas.

This difference in satisfaction between the current and churned customers represents a clear opportunity for AMS. It is critical that the opinion of these customers be elevated in all areas, especially since 83% of all respondents rate “results from past experiences with the medium” as important.

Fifty-six percent of the respondents say they are contacted by their AMS sales representative at least once a month or every few months. Further, 80% say that that level of contact is just right. Fifty-four percent of churned customers say they are contacted every few months or less, yet they are equally comfortable with that amount of contact.

Only four out of 10 say they use a ratings service when evaluating AMS. This could be due, in part, to the lack of local cable ratings data. It also could be because the majority of respondents are local business owners who don't traditionally rely on ratings data to make media decisions. Interestingly, only 54% of advertising agency respondents say they use ratings data when evaluating AMS. Clearly, there is an opportunity for AMS sales representatives to provide ratings data when appropriate and relevant, but they are not bound to it.

Satisfaction with AMS Sales Management

Respondents were asked to rate AMS sales management in four areas: “ability to resolve issues,” “availability to you,” “level of involvement,” and “extent to which they show appreciation for your business.” For each area, advertisers choose the “don't know” option more often than, or at the same frequency as, expressing an opinion. When they do express an opinion, the percentage of those “satisfied” is higher than the “neutral” or “dissatisfied” responses.

Current vs. Churned: However, the difference in responses between the current and churned customers is significant in all areas. Not only were the percentages of “don't know”s higher for each attribute for churned customers, but they also had no “satisfied” percentages greater than 30%. Their “dissatisfied” percentages are also higher than the current customers in all areas.

While respondents were not specifically asked whether their experiences with AMS sales management impact their decision to advertise with AMS, the lack of opinions and high “dissatisfied” rates of these churned customers toward management imply that this may be an area where AMS has an opportunity to improve relationships with its advertisers.

Satisfaction with Operations

Respondents were asked to rate their satisfaction level with six attributes of operations. The top-rated attributes all related to technical matters: “accuracy of invoices” (73%), “commercials airing as ordered” (71%), and “invoices easy to understand” (64%).

The areas with lower scores relate more to customer service: “professionalism of traffic and billing staff” (61%), “timely problem resolution” (59%), and “involvement of sales reps” (56%).

Two areas involving customer service received double-digit percentages of “dissatisfied” scores: “the sales rep’s involvement in the process” (13% “dissatisfied”) and “timely problem resolution” (11% “dissatisfied”). This is true for churned customers as well, where sales rep involvement received the lowest score in the “satisfied” range from them: 48% “satisfied.”

In general, though, their experience with operations does not appear to have a strong impact on whether or not the respondents do business with AMS. In fact, 60% are “neutral” or see it as “not important.” Further, there is no significant difference of opinions in this area between the churned and current customers.

Satisfaction with Production

When asked, less than half (39%) of the respondents say they have used AMS’s production services. All of those who have used the service are from locally owned businesses or dealer groups, and seven out of 10 say their experiences with production are “important” when choosing to do future business with AMS.

Asked to rate the production department in six areas, respondents who have used the service give the highest percentage of “satisfied” responses to “reasonable production schedule” (80%). The lowest percentage of “satisfied” responses is for “offering a wide range of services” (62%).

Only “level of involvement of sales rep” received a double-digit percentage of “dissatisfied” at 11 percent. This is consistent with the reported low level of satisfaction with the AMS sales representative’s involvement in operations.

Future Level of Investment

When asked whether their plans to advertise with AMS over the next 12 months will increase, decrease or stay the same, 69% of respondents say they have no plans to change their investment in AMS. Fifteen percent say they plan to increase, 11% say their investment will decrease and 5% don’t know.

The most respondents cited “no reason to” (39%) and “budget issues” (28%) as to why their plans won’t change. “Revised marketing strategies” and “customer service issues” (both 27%) are the main reasons why investments

will decrease, and “schedule effectiveness/results” is the primary reason why 15% of the respondents say their level of investment in AMS will increase.

“Budget” is the number one reason respondents give when asked what they would need to justify an increase in AMS over the next 12 months, although only 25% of the churned customers gave that reason, versus 39% of current customers. “Nothing” is the next most cited response (13%), and “effectiveness of schedule/results” receives 12% of the mentions.

Given these responses, AMS is in a relatively strong position. Of the current clients who indicated that they have advertised with Adelphia in the last two years, only one out of 10 plan to decrease their investment within the next 12 months, and one of the most frequently mentioned reasons for a decrease, “revised marketing strategy,” is not directly related to AMS’s performance. Those respondents who do not plan to change their status also refer to fairly neutral, objective reasons.

AMS should find it satisfying that the 15% who plan to increase their investment say that that is due largely to the results they have seen advertising with AMS. This represents a clear opportunity for AMS to sway neutral attitudes into positive ones, and build on their success stories.



Recommendations

Based on the results of this study, we recommend that Adelphia Media Services take the following actions to grow the commitment of existing customers, earn back the business of churned customers, and develop relationships with those who have never spent their dollars with AMS.

Present the Total AMS Package

The data tell us that the respondents are not satisfied with the sales representative's involvement in the operations and production portions of the buying process. It is also clear that they either don't have an opinion of AMS sales management or, if they do, it is fairly neutral.

Therefore, the following suggestions will help send a message to advertisers that there is a team of professionals at Adelphia Media Services who are dedicated to advertisers' success:

- Sales representatives should take a more active role in ensuring that advertisers have a positive experience in the creation of effective commercials. This is particularly important in light of the fact that advertisers who say buying cable TV is difficult cite production issues as one of the top reasons. Also, 70% of those who use AMS production services say that experience is important when deciding to do future business with AMS.
- Sales representatives cannot rely on the operations staff alone to take care of their customers on the back end. Advertisers give "resolving billing disputes" and "level of sales involvement" the lowest percentage of "satisfied" scores when rating AMS's operations performance. While they say their experience with operations will not significantly impact their future decisions, they are less satisfied in the customer service area than any other aspect of operations.
- Sales managers need to establish a stronger relationship with the advertising community. Accompanying sales representatives to select client meetings would let advertisers know that they have the commitment of senior management.
- AMS should give advertisers an opportunity to see that there is an entire group of dedicated professionals working for them. Hosting events for the advertising community that introduces "Your AMS Team" would have the added benefit of giving operations and production employees a chance to meet customers and hear their perspectives in a setting outside of formal meetings.
- Just as sales, operations and production must work together to provide excellent customer service to their advertisers, AMS's parent company

needs to be committed to that same level of service. Since there is no way of knowing which subscribers are also advertisers, quality of service and customer service needs to take on added significance for the entire company.

Stress That AMS Delivers Results

When it comes to choosing which media to buy, AMS's advertisers put results from past experiences and confidence in the value of their investment ahead of demographic and geographic targeting. Clearly, success stories and reassurances that advertisers are making a good investment should be discussed as routinely as how AMS can meet their targeting goals.

The following suggestions should help the sales representatives be more in tune with the AMS customer base:

- Be alert for any negative feelings about past advertising experiences. Be prepared to overcome these feelings by stressing the benefits of doing business with AMS. Consistently communicate the success other advertisers have had with AMS's effective schedules. Quantify how their investment will impact what every advertiser wants to accomplish: growing the business.
- Use research to back up recommendations, but just enough to make the point. The majority of AMS's advertisers do not rely on research to make their media decisions, so the pressure of being bound to ratings is not high. Take advantage of that.

Focus on AMS's Image in the Advertising Community

Since AMS's advertisers expressed fairly neutral feelings toward all media, there is a prime opportunity for AMS to differentiate itself from its competitors. By focusing on a few key areas, AMS could make a strong impression with advertisers.

For example, no one medium stands out in the handling of make-goods. This is an excellent opportunity for AMS to stress that it does not forget about a customer once the contract is signed. Advertisers should know that AMS is there every step of the way, to ensure that their schedule will be well managed and ultimately delivers what is expected.

Other strategies can be developed by looking at the areas where churned customers express higher satisfaction with radio sales. These include "handling of make-goods," "offering compelling research" and "timely response to inquiries." This again illustrates that it is absolutely a priority to

maintain a reasonable level of involvement during the campaign, offer suggestions if it is underperforming, and always back up recommendations with the most valid, relevant research available.

Reposition AMS with Churned Customers

Reducing its churn rate is a high priority for AMS. Results throughout the study demonstrate the critical areas where churned customers are dissatisfied with AMS services. Rather than focusing on each item in this discussion, the following recommendations provide a broader, image-based approach:

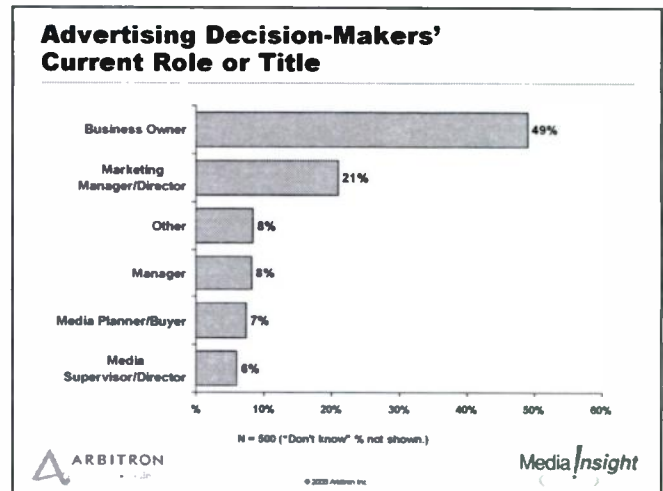
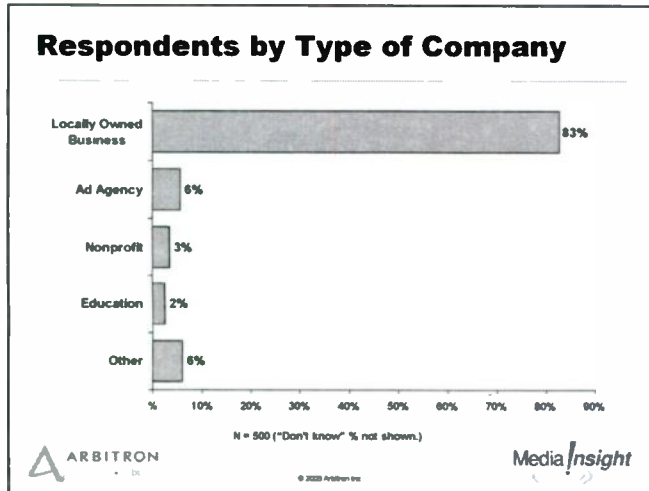
- Contact all churned customers within a set time period to schedule a get-reacquainted meeting in order to be updated on the advertiser's goals and media activities. Then determine—and follow—a schedule of regular contact that is agreeable to the advertiser.
- Implement marketing campaigns directed at churned customers that stress the benefits of doing business with AMS, and highlight the success stories of other local advertisers. This is also another opportunity to introduce the “your team of professionals” concept and for sales managers to increase their visibility.
- Elevate the importance of maintaining accurate contact information for churned customers. Churned customers should be contacted frequently and be treated as prospects. This can only be done, however, with an accurate customer database. We suggest this because, in the fielding of this study, 36% of the sample provided to us by AMS was unusable. The main reasons were “disconnected phone numbers” (14.8%) and “no answer” (10.5%). *(A detailed chart can be found in Appendix A.)*

If Adelphia Media Services takes the specific actions recommended above, we believe it has a real opportunity to differentiate itself from the other local media, reduce the rate of churned customers, and reinforce existing relationships by stressing its commitment toward results and the dedication of its entire Advertising Sales department.

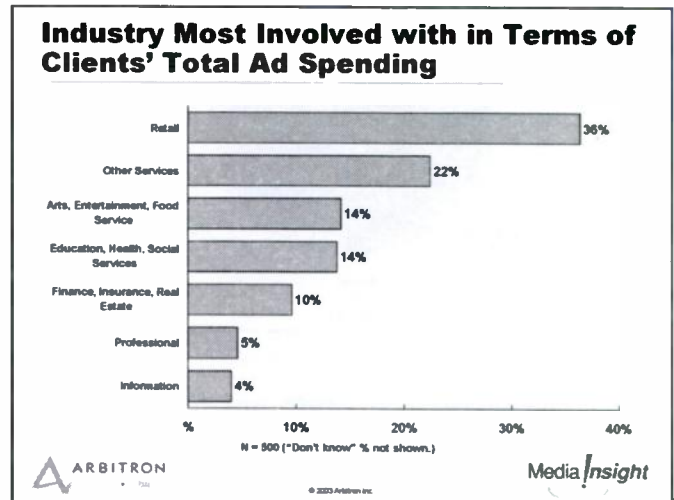


Appendix A: Charts

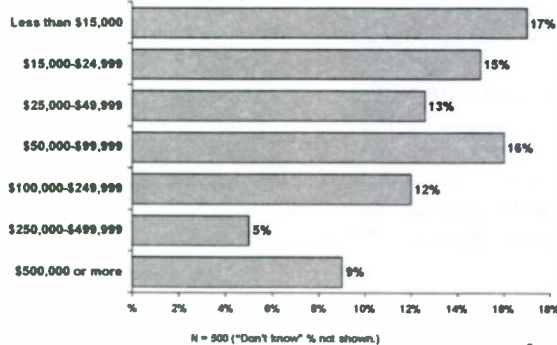
More than 80% of the respondents in this study represent locally owned businesses, and nearly half of the advertisers interviewed are business owners. The following two charts provide more detailed information on the demographics of the respondents.



More than a third of the respondents in this study are involved in retail. A breakdown of the industries the respondents represent is shown in the chart at right.



Average Annual Advertising Budget



ARBITRON

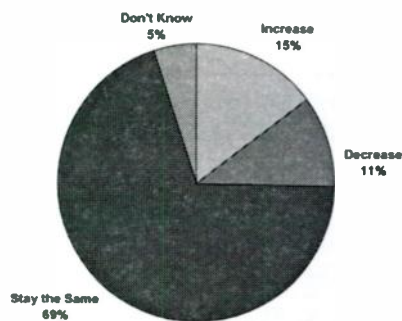
MediaInsight

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The survey included Adelphia Media Services customers whose annual advertising budgets ranged from less than \$15,000 to more than \$500,000.

Respondents were asked a series of questions about their investment plans over the next 12 months. Their responses are shown in the following five charts.

Future Investment with Adelphia Media Services



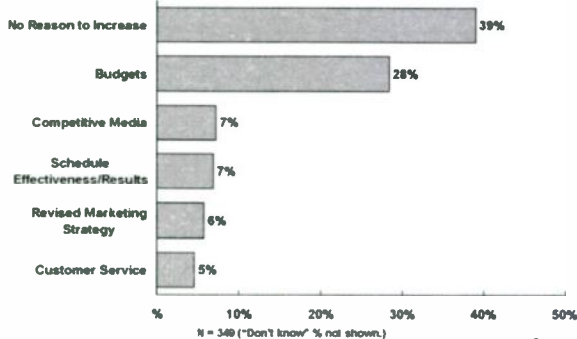
ARBITRON

MediaInsight

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Nearly 70% of respondents say their investment with AMS will stay about the same. Other predictions on future levels of investment are shown in this chart.

Reasons Level of Investment Will Stay the Same



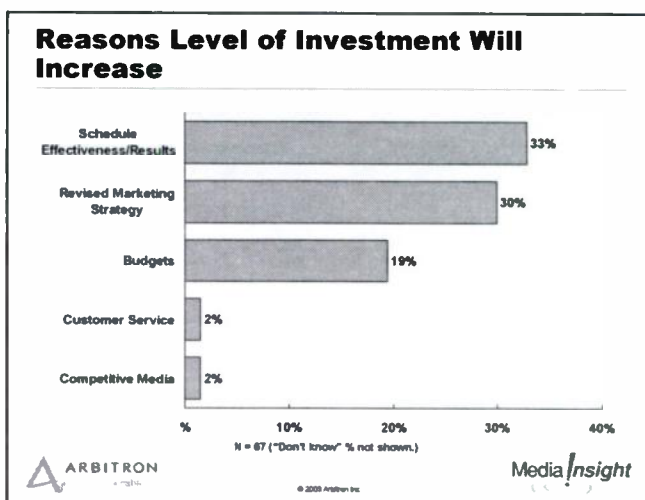
ARBITRON

MediaInsight

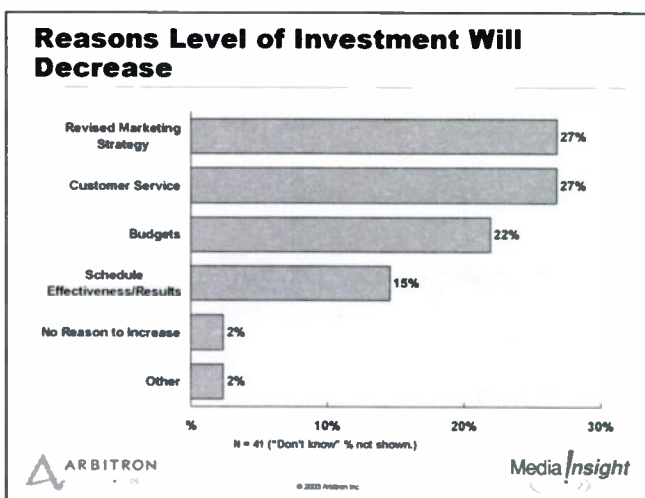
© 2003 Arbitron Inc.

More than one-third of respondents say they have no reason to change their level of investment. Other reasons given by the respondents are shown in this chart.

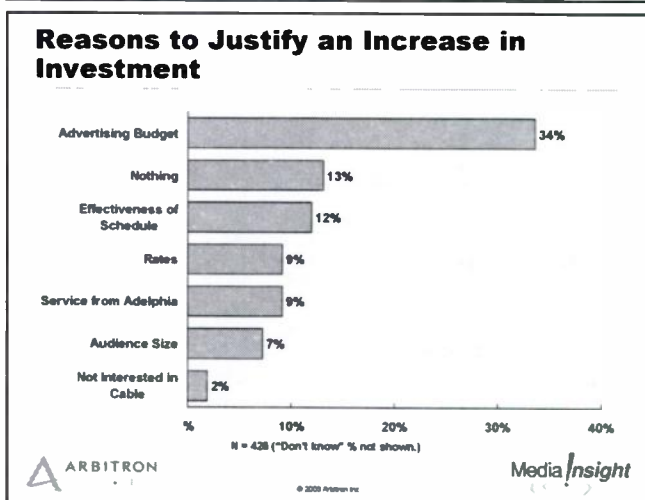
The chart to the right details the reasons respondents expect their level of investment to increase. A third of them say it will increase because of effectiveness of schedule.



Changes in marketing strategies or customer service problems are the primary reasons behind their decision not to increase their investment with AMS. The chart to the right details the other reasons given.



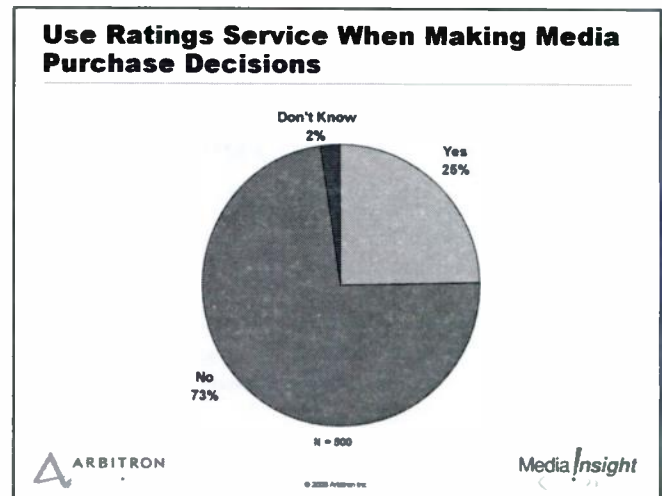
All respondents were asked what would be needed for them to consider increasing their level of investment. The chart to the right indicates their reasons.



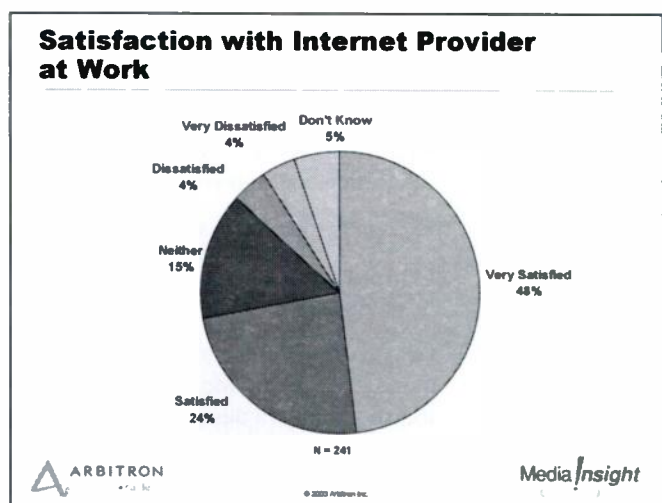
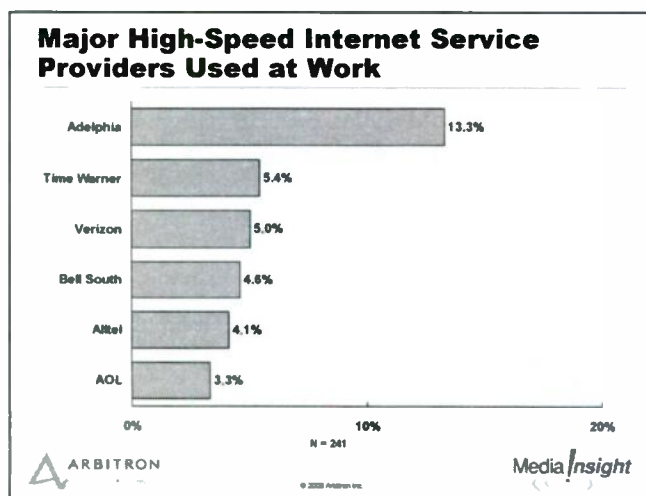
Adelphia Media Services provided the list of contact names for this study. The following chart details the final calling disposition of the sample provided.

| Final Calling Disposition | Count | Percent of Sample |
|---|-----------|-------------------|
| Total Sample Selected for Calling | 2,967 | 100.0% |
| Ineligible/Unusable Sample | 1,070 | 36.1% |
| Did Not Purchase Media in Last Year | 111 | 3.7% |
| Disconnected Phone | 438 | 14.8% |
| Residential Phone | 85 | 2.9% |
| Computer Tone | 90 | 3.0% |
| No Answer | 310 | 10.5% |
| Wrong Number | 4 | 0.1% |
| Language Problems | 32 | 1.1% |
| Eligible/Did Not Complete Interview | 1,397 | 47.2% |
| Busy Phone | 36 | 1.2% |
| Respondent Not Available | 303 | 10.2% |
| Initial Refusal | 293 | 9.9% |
| Scheduled Callback | 435 | 14.7% |
| Answering Machine | 246 | 8.3% |
| Blocked Call | 46 | 1.6% |
| Refused After Qualified | 38 | 1.3% |
| Completed Interviews | 500 | 16.9% |
| Total Usable Sample | 1,897 | 63.9% |
| Final Response Rate: (based on usable sample) | 500/1,897 | 26.4% |

More than 70% of respondents say they do not use a ratings service when deciding which media to use, as detailed in the chart to the right.



As would be expected, respondents use a wide range of high-speed Internet Service Providers (ISPs) at their place of business. The charts below show the primary Internet provider used by respondents and their level of satisfaction with those providers.





Appendix B: Verbatims

Why do you feel that buying cable TV is not as easy as buying other media?

Following are verbatim responses:

Answer the phone with a human, not a machine. Ad rates have increased several times in the past two years. I think it is too much.

Better communication between sales and billing office and the traffic department.

Better production of commercials.

Broaden the networks.

Continue to increase their market knowledge.

Doing a pretty good job. Areas need to be larger.

Everything as been very positive and very fair.

Everything revolves around price, so I would say if they could lower their rates.

Expand the markets you have.

Find out more about each individual business, and a little more contact.

Get rid of that voice mail system, and get more-creative commercial writers. Would like more help in designing commercials.

Give away free things to customers.

Have done a wonderful job and there is nothing that could be done to make it better.

Have the reps contact me on a regular basis.

I am satisfied.

I don't know. (2 occurrences)

I don't see anything.

I have no complaints.

I set up three accounts with lump billing; the other two agents get 200 spots when I'm getting 20 spots. Would like to see if evenly dispersed.

I think more communication with clients.

I would like to get better research and ratings information.

I'm completely happy with it.

I'm pretty satisfied with the services so far.

I'm very happy with their services.

I'm very pleased with them except when it breaks down, the customer service telephone lines take forever.

In advertising there is nothing that is needed; in communication I would like to have just one account for everything.

Listen to the customer's needs and understand what my business is before trying to advertise.

Lower rates/prices. (2 occurrences)

Maybe they could make a detailed study about what their product can give them versus other media.

More promotional specials.

More spots, less money and reach Hispanics.

Negotiate on rates or bonus spots. Get bonus spots from CableAdvantage.

No suggestions. (25 occurrences)

One rep for all markets.

Pick more specific times to air commercials. Very little results from commercials.

Please do not call me back wanting to answer a thousand questions.

Pretty satisfied.

Proactively present new ad programs, and show how they could work.

Really don't know of anything offhand.

Now that you've rated the ease of buying different media, why do you feel that buying cable TV deserved the rating you gave it?

Following are verbatim responses:

The different vendors not being as educated as they should be. It seems pretty new; radio seems to have everything and cable is still learning.

Everything boils down to what spot I am going to be occupying and what they are requiring. It has everything to do with money. Prime time is always expensive in radio and broadcast TV. It's all about money and the time slots. If you want more advertising on a particular cable channel, what time is a factor for what you are paying.

I have to buy multiple companies or areas, and that makes it harder in broadcast. I think TV is hardest because it is slow and it's hard to have a good production. It's harder to know who your audience is on TV.

It's harder to get accurate research.

We found that some places did not get our cable channels that we advertised on.

It was just a lot of hassle getting it set up.

It's not difficult, just a lot of arranging...and time consuming.

I don't know too much about contacting cable TV.

I have had a very difficult situation with my local station rep and the billing problems.

It's impossible to read the invoices. You have no choices in the station programs, everything is such a ... run station that you don't know what you're buying.

I buy one system at a time, and I buy the systems selectively.

Probably least familiar with it.

The people who work there are horrible and poorly managed. They are so poorly managed there.

It's too diverse. It's hard to buy a complete audience. There are too many things to put into the package.

The main reason is I don't have a rep to call.

It's just a pain in the (expletive) to do business with them; that's why it's hard to buy from them.

The people you deal with....the filmmaking and that kind of thing. It takes all day to do what they want to do. I get my return for my dollar.

It's difficult selecting which channels to put the ads on.

You have to make the commercials. They do not contribute to the process.

They don't make it easily understandable, because you don't know what you are buying.

We buy on a local level so we deal with a lot of different cable operators so we get good rates, but it's hard to put schedules together.

They're too expensive.

We are having some local problems with trying to get things done when and how I want it. They don't show up when they are supposed to.

It's much more complex, because there are so many more options and the production is such a big concern. It's just much more difficult.

The ads take a while to run and it's too expensive. It's hard to get our ads ran properly.

Don't know. (8 occurrences)

Simply location of salesperson...they are located out of town and it's difficult to reach or contact them.

It seems like every zip has two or three cable systems, and you would have to buy them all in order to reach your target.

We are a small state and it's mostly done out of state. Not many local contacts.

You have to schedule it and have the commercial shot.

Inexperience...I knew nothing about it when I got into cable.

Difficult to find who owns the network.

It's hard to find the right person to talk to.

Production cost, proofing and editing make it difficult and to buy it.

Most cable TV you buy is zoned so it makes budgeting and post harder to buy.

That's just the way I feel.

It always takes a long time. It's a battle.

It's two grand for nothing.

In what ways do your personal experiences with Adelphia products or services in your home influence your decision to advertise?

Following are verbatim responses:

If I did not like the programming I wouldn't spend my money.

Make a decision on what station to use. It makes more sense on cable TV.

What I see on TV and how it comes across, the quality. And scheduling, how it's set up, you don't want to put things back to back that have nothing to do with each other. Commercials come on and they are super loud.

I don't know. (10 occurrences)

I use that cable at home; it's our market area.

There are so many channels to pick from, it's nice to see a national show and a local commercial. For us, when we place our ads we can target for any time we want to and we can target a specific show like on the home and garden channel so the fact that I watch the TV, I see the shows and commercials out there.

The commercials I see on TV...if there is a channel I like...and the way the commercial was done.

They help me see how they come across.

I'm going to say there are a wide variety of channels available and the excellent local advertising we actually saw on cable TV. We saw so much local advertising. The local people and business in advertising and seeing how well the ads were made really impacted us.

Looking at the commercials...when they are running. What is their target market...and how it relates to the commercial. How repetitive the commercials are...and if they

are running over and over again...also, how successful they are.

The experiences that I have had with Adelphia have been very poor. I have personally written letters to the upper management and had problems after the customer service reps were unresponsive. I wish there was competition but there is not, other than satellite.

Seeing local advertising.

The way I see the commercials and the quality of programming.

I am satisfied with Adelphia cable services. If I weren't satisfied I would not advertise with Adelphia and my customers wouldn't see my commercials. After I ran the commercial, I never had any contact with the salesperson.

The quality of the content and the way they do other types of commercials.

It's about dealing with the people in response with the service department. We hear complaints about the computer system going down a lot because of the Adelphia.

When I see what channels are out there marketing to my customers.

If it is easy to work with we tend to work with them. If we have a lot of problems we walk away.

Watching the local breaks and how they come in and out...are they chopping off the ends of commercials? Can you tell immediately if it's a local break or not? And, what channels are available for us to use. When my first contract was on we couldn't get on the cable TV and now we could.

I have Adelphia at home, and I see TV commercials all the time. I got digital at home as well. I use Power Link and I'm pleased with it.

They have quality products with the Internet. I don't agree with their programming. They have on their cable system independent film channel, IFC, then there are two or three channels and then Sundance and in between are kids' programs. Sundance is for the gay community, and I thought that it is very displaced right next to a kids' channel. I find that very inappropriate.

I go by what I see from what other companies do.

I felt if I was watching the preview guide others were. I'm in advertising so I knew my target demographics were watching, so I know their impressions.

If I happen to see the ad myself...the times it's running and if it seems to be constructive to the service.

When the rep came in and showed what they do for other companies as far as advertising....they had a TV and brought in a tape and showed it.

I watch the station I advertise on. I get to see all of my competitors on it, and I am able to work based off of them.

Seeing the advertisement over and over.

I guess it's more visible to the public. It's got more range.

It gives me a chance to see or look at it in terms of what the audience is seeing....helps me to evaluate the quality.

The quality of the ads. They need to look professional.

The quality of production.

We get a lot of people who respond to Adelphia's cable.

If I'm not satisfied with the ones at home, then I won't give them my money.

Quality of programming, channels available...they are the only one in the market.

I'm very satisfied at home and they have a very good reputation.

When choosing which channels to advertise on, I consider which shows I like and which shows my husband likes. If I am trying to reach women then I would choose a channel that mainly appeals to them and the same if I were trying to reach men.

I'm not very happy with my home services.

The quality of what they are showing on their commercial. They always have the same ones and it's boring.

If I watch some shows I think it would be good to advertise on.

How it appears to flow...and their level of professionalism.

I see how they treat a consumer. So if they treat them like (expletive), that's not good.

If I don't get good customer service, then I don't want to advertise.

Most people watch TV and it's local.

When we had problems we would get the runaround and that was ugly. From there we stopped using Adelphia communications. Company communication was the biggest problem.

Quality and ability to go in and out of breaks... overall advertising break quality.

From what I've seen other companies do with their commercials.

The service I get at home is just as good as the service I get at the business.

Quality and speed of Internet access.

Programming content.

By watching the other commercials and seeing how they are doing.

My cable service is fine, I'm satisfied with them, but with advertising with Adelphia has not been the same, my general manager makes the decisions.

If I have a bad experience with them one way, it's a bad experience the other way too.

I have Adelphia Power Link and I like that. I thought that when I talked to the Adelphia

sales representative it would be a good way to advertise because we were opening a new store and it worked.

Personal service.

Quality. Adelphia is the only one around here.

The quality of their programming. (2 occurrences)

It probably influences which stations to advertise. Quality of production. If there is less quality done in the house, ad's fuzzy.

Seeing other local business and commercials as well as actually being able to ask Adelphia made it nice.

The hostess on the program is really friendly and personable.

By seeing other advertising. Reviewing ads and commercials.

Their quality of program is going to make an impression on their quality.

It's the quality of their service and how they handle problems. I have had something act up through their broadband service and they fixed those problems in a timely manner with no hassle questions.

Pretty much I watch it and I see who else is advertising. If it's local business like us, I know I can use it.

When I see other commercials...seeing when they run. I tend to notice other local companies advertising on cable.

I watch the ads and think about the production quality and the presentation.

I asked them to do something that I thought was reasonable and they refused. It took months to get an answer. They need to be able to deal with customers on an individual basis. They lost \$15,000 in revenue...lack of good business.

See what others are doing in the market.

Quality and service.

I'm not being treated well by Adelphia at all.

Depending on what I'm seeing and what they advertise.

The performance of Adelphia is not that good. They accuse people of doing things they think we are doing, but we are not.

They are the only ones in our area.

I do business with them and I'm pleased with them so that's why I use them at home also.

They're pretty much the only game in town.

Other business we advertised.

Watching the programming and the type of programming and trying to relate that to my business.

The number of services available in the neighborhood.

They do a good job.

I don't like them.

The quality of service is very important. The job they do in home is compared to the job they do otherwise.

I saw a commercial of another retail store.

If I see local people advertising with them, then I know they're good.

I feel the commercials give me ideas. Adelphia cable is different than the one I advertise with.

If I like them in home then I like them for advertising the business.

They give the same exposure of other businesses.

In the next 12 months, why do you believe your company's level of investment with Adelphia Media Services will increase, decrease, or stay the same?

Following are verbatim responses:

I'm assuming they will still be in business. If I didn't have to increase it I probably wouldn't. We have had numerous problems with the delivery issues, things running as ordered. They have not been working well in multiple markets.

We got great results from advertising. If the results are there we will keep giving the money.

It has been good, so we will continue on the same path.

We don't plan on spending more with them in the next six months, it's already set.

We don't get any support.

Not interested in cable, never got a good response.

Budget issues/lack of money. (50 occurrences)

I only have a certain amount of clients that I need Adelphia for.

It's based on the events I do and those events are already charted out for 2004.

I don't know. (38 occurrences)

Our client is fairly well targeted in the media; we don't see any really big change.

We are rolling into our quiet season, so it is going slow.

The response from the cable advertising has been weak.

We get good results from them. (2 occurrences)

It depends on the cost.

We are advertising to the limit that we can.

Advertising cutbacks because of the economy. (3 occurrences)

We would run the same ad for the same couple of years.

It has been very good for us and we just like it a lot.

The down economy. (7 occurrences)

We ran our seasonal campaign with them. That's getting ready to end.

I don't think I'll do much advertising.

Client that was advertising isn't advertising anymore.

I don't think we are doing much airing right now. We have split between Adelphia and Comcast.

I'm limited to my cable advertising. It works, but it doesn't work like newspapers.

I have spent a lot of money on the cable ads and now I am going to cut back.

We're a small business and we can't afford to do a lot of advertising.

There are only certain networks that work well for me to target. So unless the networks expand them, then there is no need for me to expand.

We weren't getting results using them.

We're going to do better in sales, because of the advertising with Adelphia.

We will probably be focusing differently in our advertising media choices.

We are not going to expand, so I think they will stay the same.

We're moving into a new market which Adelphia will reach.

I budgeted it. We're going to grab a couple of additional channels.

We have more events that we want to advertise for our calendar.

I don't have a crystal ball.

Looking for a different market.

We'll be doing some budgeting soon, so we should stay the same.

Cable is good advertising: it's cheap and targeted.

I have no reason to believe otherwise.

Not in a mode to increase the expenditures...we're comfortable.

I don't think we are getting the right kind of service we need. The communication is awful.

We are focusing on a reduction of advertising expenditures.

I just signed a contract with Adelphia and we might modify our commercials, but it will all stay the same as far as budget. It's an annual budget.

I think cable TV is a viable medium.

I have better luck with radio.

It is set for the year.

We average about the same amount of concerts a year. It may go up and down a little bit but not drastically.

I hope we do not lose any clients we have now. We just want to keep the same number of clients as now.

I think it's becoming more effective at marketing towards my audience. I think we're realizing it's more effective if we can more accurately ID who we are targeting as we get more specific to an audience. Cable will be more effective.

I believe that we need to use more of that local insert; it's now a matter of affording it.

My unhappiness with the account over the last six months.

The number of events we advertise are going to be about the same.

We use a lot of co-op money and try to use as much as we can.

It's a great thing to do.

I believe we went on a year contract with Adelphia.

Don't expect to stop business...we use other media now...a different mix like the Internet.

More things will be happening here. More programming.

We have been satisfied with the results as they are.

We're working on a new television spot.

I am happy with what I am purchasing, which is cable commercials. I am happy with the response from my customers seeing the ads.

No more advertising this year.

I think it will...there is no reason to increase it.

I'm pretty content working with the radio people. They're giving me thousands of dollars in promotions. I like their perks.

They're idiots! Replace the management. They couldn't get the spot right...it didn't run half the time. It was a disaster. I wrote the spot and produced it, and they still screwed it up.

Our business is very similar year after year.

I don't see any reason to increase it because business will stay the same.

We'll continue the advertising we're doing unless the price goes up. I don't think we'll add more to it.

Will use as needed.

Our industry is going electronic.

What our sales have been and what we have forecasted our spending and profit to be...it's just the way the sales are going, it's hard to say.

We have been satisfied with the amount we have used in the past and we are just leaving it as it is.

Switching into TV gear right now.

No one calls on me, I have no assigned rep.

I don't believe the person who sells me the product works hard enough to satisfy me and my needs. I want things because I am paying. The service when you call with a problem is not good. My experience over a couple of years has not been that great, the service is horrendous.

Business is bad.

I am no longer involved with them. I do not use their services any longer.

I haven't had any contact for almost a year with Adelphia.

Business is status quo...we have had no changes.

Inability to get satisfactory make-goods...some months half the schedules are wrong. The concept was great but the delivery was pitiful.

I don't believe we are going back on it...on Adelphia cable for the rest of the year.

We are on the increase with everything.

I am happy with what I am doing, and I am not looking to invest any more money. I think the cable advertising that we have been doing with them has been good. We have gotten really good responses from it.

We had a campaign that is closed down; our campaign ended.

I do not choose to go any further. I only have it on one channel and it is doing fine as it is. I don't need to do any more. I have left it like this because I don't want to talk to any of them.

The project is coming to an end.

There is a market to be covered by broadcast.

We are a state agency and everybody is decreasing. It's a budgetary thing.

They hit the target market. They are the game in town.

Haven't had any reason to increase...I think I have the proper level now for the mix of advertising I do.

It hasn't done anything positive to make me want to spend more or less.

For purchasing high-speed Internet...buying it through Adelphia. They would get more money from us that way. We thought that would make it go up a little.

We are pretty consistent with them. We are okay with the level now.

Today I am going to make a big purchase with them.

I'm not hearing a lot of feedback in my advertising.

We're not doing business now and we won't start to.

I'm old and do not like to change things. It's fine, everything works or nothing works.

We're going to continue to advertise.

At this point they have not given me any reason to invest with them.

Our state is in a budget crisis to universities.

It's a medium to use.

It's a good value for us, having Adelphia.

We are in the process of making two new commercials.

Based on the impact of the market as it stands against the other media.

I didn't like services.

We're a relatively new business, and it could change in a short period of time; but as of right now the goals are where they are right now.

Quality of product...as far as channels offered to advertise on, awareness of the consumer.

We are satisfied with what we have.

It's part of an ongoing project we are working on.

We're targeting a different area because Adelphia doesn't cover.

I don't see any reason to change. We don't change a lot around here.

We need to stimulate more sales.

I think it's been adequate.

Adelphia is not really in the market that we are in.

I would not put any more money into TV advertising. It is working where we have it now.

It is the budget...the same project that we are keyed in on with them, and there won't be any changes on the project.

I'm doing what I want to do.

We haven't done any new ads in awhile.

I'm going to infomercials on broadcast television.

So far we're satisfied with the budget I set aside and the feedback I get from the customers.

Next spring is when the new office opens and that's when I will potentially do some marketing over there with Adelphia.

We just shifted in our marketing direction. We're on the local news, so we buy straight from them.

The walk for life is in the process for expanding; we have a marketing plan.

I'm just not really convinced they are that good; we are asking everyone who comes in here if they are seeing the ads. I think they randomly put you out there, but it's not what I want, plus I can't get cable out here.

The market stays the same.

I think that things are going and we are very happy with that.

Already talked to a rep about increasing.

We do the same thing every year.

We're growing like a bad weed.

We generally split our dollars between Cox and Adelphia. Between the two, we cover the market.

We're doing so good.

The amount of events we have projected for the next year.

I just signed a new contract, so it should last about...

We just finished making a commercial, so we have a year to run it out.

Until the company will get (its) act together.

The success we had with Adelphia.

I do not think that it is effective.

More business.

They provide advertising to one of our branch offices...which best suits our needs in that area.

It's just how it has been. I like Steve Scott; he is the Adelphia agent that sells me the advertising.

They are too hard to do business with. They don't return phone calls or fully disclose everything you are going to be billed for. I had to deal with four different reps within a 100-mile radius.

It's the same thing, so it's going to stay the same.

With growth of sales I will spend more money.

We're changing media.

We are going to be advertising some more products. We are going to be buying some more television spots for national commercials. Compared to what we have had in the past, it won't increase that much.

Satisfied with current level of results.

We're satisfied with it, and we're not a big company so we're not going to grow a whole lot.

We are utilizing all the services from Adelphia.

No reason for it to increase. We are happy with where we are at and what they are doing for us.

I don't see any compelling reason to increase.

Business is increasing.

Didn't work out for us.

I'm happy with the results of what's going on.

We are pleased with what is happening and have no reason to change our level in investment.

The people out here watch Adelphia.

We've had good luck with what we have.

I have no involvement with Adelphia. Since I wanted to air my commercials on TV and they were the only cable company, I had to go through them. They were my only option, and they did a horrible job. To me it's critical my commercial airs on schedule, but they would air them on the wrong shows.

I have been very happy with what it has done. It has brought customers.

My particular business uses the newspaper most to allocate business. Budget reasons also.

We are spending more money with them.

I guess if we get new markets, since we're expanding.

It works well for us.

Moving toward increase in budget in that area.

Our client base is increasing, growing.

We can't exist without advertising.

We are looking at doing a different campaign.

Next year we might decrease it but not this year. The area is not that large and we've saturated it, so I can save some money.

Lack of involvement by Adelphia.

I bought it already.

I get the response I want from the advertising. I can't see increasing it when I'm getting what I want.

It's just working the way it is fine, and we are directing more money to direct mailing.

Adelphia is in a market that we want to penetrate more, and to be in a more efficient area would be of great help to us.

We don't plan to increase business. I'm happy with the current level of advertising. I don't plan to decrease advertising.

There are only certain times of the year when I know I need advertising. My sales rep knows what I need, and he calls when he knows I'm ready.

I just kind of know where I am going in advertising. We try to somewhat plan ahead. We know what promotions we have coming up and we know what works for what.

We only do minimal advertising through television.

Nobody contacts me. (6 occurrences)

I don't think it's the best medium for reaching my audience. I can't get the high-demand spots. I had no problems when there was a local office. When they closed down and moved to the city, I have been very dissatisfied and I reduced my cable buying because of it, or I would have increased it but I didn't.

I have a contract in front of me that will double it than last year.

We are going to get rid of Power Link.

I think the commercials work. I have just enough money for this medium.

The budget I run on stays at the same amount. Until then I don't have the funding to increase. Basically it's because of the budget I have right now, I do not plan to decrease investment.

The economic factors out there.

It's effective.

I think I won't spend any more than what I spent last year with them.

It's only certain times of the year I advertise.

We had a one-time, six-month TV commercial that didn't do well so we won't do it again.

Very honestly, I can't afford to do any more, that's the main reason. I only have a certain amount of budget to work with, and my sales are not good enough right now to increase business.

We are not planning on doing any more advertising. We spend our money where we get a large response.

Our clients aren't really increasing budgets right now.

We are at our peak at advertising expense.

Everything is going good as predicted.

It's not really effective.

I have more to promote.

It doesn't reach the broad market I deal with.

The contract. I already have a contract for the next year; we're only two months into it.

It is just the way it works out in our budget. We have had the same kind of setup with them for years now.

I don't know where our clients are going to be, if they are with Adelphia or not.

We will stay just the way we are doing now.

I'm not advertising as much.

We don't need anything else, we are fine.

If they give me more productive airtime and make it more useful to my company, then I will definitely increase my business. If I had an audience exposure, then I would increase. For me the weather channel is just ideal and I did a commercial. That would be more appealing if I can attract a more varied audience.

Our owner is cheap. The owner doesn't want to spend any more money than we have to.

We won't do business with them in the next 12 months.

Add another product to our line.

Once a year for two weeks.

When I stopped advertising it didn't affect my business.

It's in line with the amount of business that's done.

Business has been going up, and we're doing very well.

I do not have that much interest in increasing what we're doing with them, both from our clients and from us. We also have more than one rep and more than one manager at Adelphia. The rep in Maryland has been very good, but the rep in Virginia was so-so.

The current schedule is working out just fine.

It was already increased this past year.

We are leaning towards other media sources. Our experience was not what we expected.

We don't use a ton of cable so the level we use now is fine. It's not one of our lead media types. It gets us a fair amount of business, but not the strongest one.

No level of expansion, no need to do so.

It hasn't really improved any since I've used it. The poverty of everyone losing their land, I don't see anything picking up at all.

The price is in a tough market. I think in my research it's been a good value in cable.

I like the program that I ran last year and will use it again.

My ad campaign is going to be the same.

I/we don't plan to advertise with them again.
(2 occurrences)

We're trying to reach out to the Adelphia coverage area to a greater extent in the future.

The sales rep did not call me and I don't think that I need to call them. They should call me.

Unless we do something with high-speed, there is no need.

The market we do it in. The money that we have covers it very well. The range of programming we want to do.

We are getting new clients that are interested in Adelphia.

We are very happy with what we have done and the advertising people we are with—such as airtime and response from them.

We are getting everything we need.

We usually give five percent more to advertising because the business expands.

My budget philosophy and market plan are the same.

I don't think they have anything else to offer that we don't already have.

What we are doing is working, limited market access. No reason to go any further than where I'm at.

It is expensive.

I'm not looking to advertise any more.

I'm extended in other directions. So I will probably not do any more this year.

We ran our commercial for a few months and I think we got good exposure, but it's not something we want to do on a regular basis; we just want to bring it up once in a while.

The only market I buy ads in is very small.

Consumers aren't really spending. When they spend we spend.

I have no reason to believe otherwise.

We don't need any more advertising right now.

Stay the same, which is zero.

I am pleased with the service. Maybe in the spring we will do something different to advertise, but right now we are happy.

I don't believe we are wanting to do any commercials unless business picks up.

My business allocates a certain amount of money every year and we're doing fine so far.

Not getting a response from Adelphia.

We're not planning on any large budget increases so no need to change.

What we would have to invest.

It did not generate one call from the advertising.

I think we will continue to do what we are doing right now—weather crawl—which is the little messages that scan across the

bottom of the weather channels or TV programs.

We've lined up our schedules for the next year and what we've got schedules for we will keep.

Has to build.

Won't increase services.

I'm planning on doing another commercial.

We have a contract.

I still have to advertise with them to keep advertising going.

We are not doing anything with them/Adelphia. (4 occurrences)

They are established here. Only so much I can get from this economy.

Do another commercial.

We are not using Adelphia Media again.

We already got our advertising planned for the year.

We probably won't use it.

It's just been consistent over a period of time.

I don't see a sales rep. They took my money and ran.

I just don't think we'll do any big-time marketing soon.

Well I'm not doing anything with them and I don't plan to. I have not done much with TV before.

I'm happy with it.

You up your prices...due to cost.

Where the market is right now and the patient base is.

The only offer I get from Adelphia is TV.

We have not used that medium before and we don't have a lot of advertising budget. We don't plan on changing our advertising format.

I don't even have cable TV here. It doesn't start until a mile up the road. It's a dead area and not available here.

We're not planning any changes. (11 occurrences)

The economy. Cutting back on advertising with Adelphia and newspaper. We are sticking with Cleveland magazine.

I guess people look at TV more. The more advertising the more business. Whenever you show someone something, it's wanting more.

They are not very aggressive in soliciting advertising. All broadcast channels contact me on a regular basis and Adelphia has not contacted me ever.

I think what we have done has worked and we will adjust some things. I doubt the spending will change things.

We will not advertise with Adelphia. We don't like their business practices. We don't like their billing practices.

It is not going to increase. They don't reach the targeted area. They don't have the coverage I am looking for.

Only because of the commitment we have with other media.

They use other cable stations in other areas for the stores. Depends on coverage.

No plans to advertise with them. (2 occurrences)

The poor service they give to our clients. That is why I have cut back with Adelphia.

It's only because we haven't used it in the past year, but I'm considering to use it this year.

No reason for us to acquire it at this time.

We're not planning on doing anything else.

We cannot target geographically. We can't do any programming that can be posted. We can't post what we purchased after the fact.

We worked with Adelphia before, and what happened was when the sales rep went on to a different job we weren't being tracked by the new person. Then there was a new person and so on. The revolving door on sales reps hurts.

We don't plan to do anything on a local basis like we used to.

We are on a budget cut as far as advertising. Our doctors don't like their faces on TV.

I just don't see any purpose. To my knowledge we have not been approached by them in any way.

We don't need to advertise.

I have bought extra time for the football season.

We used it and value did not prove to be there.

You're asking for a prediction of the future; I'm not going to answer that.

We have moved from cable to broadcast and I don't see us moving back.

I'm not going to spend that much money in advertising.

Just the way the business is structured. We don't need to increase, so there is no clear reason.

I will do more advertising.

I am very happy with what I have.

We really don't do much besides the Internet, so as far as broadcast television and such we don't do much of that.

No reason to change.

We have a new product coming out.

I wouldn't mind talking to them, because it will get better for us.

I don't have any services.

We are not doing any advertising with them right now and have no desire to.

Business hasn't been real great. I don't see any extra money going out there.

We used them a couple of years ago and were not satisfied with them.

It's according to our target demographics; it's not going to change.

We're not that big. We are a very small company.

We are not doing that much cable; it's not effective enough.

No reason to change. No growth. We aren't going to expand.

We've found it wasn't a particularly effective way to reach our customers.

We have no intention on using television.

It is fine for me. I'm satisfied and getting what I need.

We are happy with what we have.

Our business has been doing pretty good and we've been able to afford advertising with them.

Nothing is growing.

We use our own resources, radio.

We usually go to the networks and stuff; we only go to cable if we have to.

Not advertising on cable anymore.

They are not in our area.

We are going through a name change. As soon as that goes through we will advertise with them more.

What would you need to justify an increase in your company's investment with Adelphia Media Services?

Following are verbatim responses:

I need better delivery on services. They would run when I ordered. More cooperation from management to make things easier for the clients I work with.

It would be on my business side. In order for me to increase I would need to see higher production.

Great prices and better results. The economy is the issue.

Larger budget/more money. (35 occurrences)

Support.

Lower rates. (16 occurrences)

I don't know. (73 occurrences)

More sponsors to pay for advertising.
Involvement with Adelphia would make me increase.

Increase in business/more sales. (32 occurrences)

More coverage in my local area is needed before I would go with Adelphia.

I would say a little more awareness. Most people on cable advertise food or other products, but being in the military we do different consumers.

Nothing. (32 occurrences)

A better economy. (10 occurrences)

Tangible results, more business as result of ads, proof of return on investment. (17 occurrences)

Bigger client budget; there is nothing that Adelphia services will do.

Increased effectiveness, meaning more leads.

If they increase their area. We are on the borderline of Charter and Adelphia.

Bigger co-op from companies.

More clients who could use their area.

Not interested in cable TV at all. I can't hit every market. I would rather go to broadcast TV.

They have to come up with a solid campaign for my business. Overall they are good, but the last group of ads did not work as well as the others.

More coverage and more viewers.

I don't really deal with budgets, and I don't remember anything about my Adelphia reps.

I'm not going to do it, because if it's on cable only certain people can get it.

More money and proof that they could increase my store traffic.

The boss is wanting more airing up there.

My business to double. Some items sell and some don't. The economy is kind of slow.

More networks.

There is no reason to increase, so I don't see the purpose; nothing will increase it.

(Knowing) what you're paying for (is) actually paying you back.

We would need to evaluate our medical practice to see if we need more advertising.

They would have to guarantee customers in order to justify an increase in the company's investments.

For services to be added.

There would have to be an increase in the congregation.

A lower rate or a different blocking system. Maybe they give you six channels to choose from and maybe they could give you 10.

More revenue. Our budget is based on revenue percentage.

Much improved service. I would have to know that my schedule is going to run as planned. My invoice will be decipherable and spots won't be running after the event is over.

More production for my business. More money coming in.

I would need them to have flexibility to negotiate cost.

Client base, productivity and return.

I like the service; it's just that we need more money.

Better service and more outlets in area.

We would probably have to have a new program or product to advertise that would create enough revenue to handle the cost of the advertising.

More money from government.

A guarantee that we would do more business. (2 occurrences)

I would have to have a remarkable return, but it would not be realistic.

Nothing. I'm happy with the radio people.

Some kind of promotions.

I don't see any reason why we would want to increase it. Only if business went way down and cut in advertising....

Have a rep call me. I don't have a huge advertising budget, so it doesn't go a long way.

Better time slots with a better pricing.

If they could effectively help us grow our business, then I can see us investing in them.

I have a ton of people who want us to spend money with them but can't show us any results.

Better economy...more people buying cars.

Right now we don't think TV is the best form of advertisement for our industry.

Better return on investment and more proof that it is working.

Our budget would have to open up on our end. Our budget is tight, so we don't have a need for them.

Commitment and concern.

Better service in the whole picture. I have a good response with radio and I don't find that with cable. Cable service is horrible.

New clients that need specific targeting in the markets where Adelphia would be. Add more networks so 18-35 programming could be added. If all the broadcast went out of business, that would help my business.

There is nothing I can think of that they can do. I do not see myself increasing investments with them ever again.

If they gave me more contact it might be possible.

Other options on where we could run our make-goods.

I would need the marketing representative to come to me with a program that meets my needs. It would have to fit my available advertising dollars and reach the audiences that I am trying to attract to visit us.

I am not going to.

More showing of profit. If the money does not come in, then you can't put it out.

Greater efficiency at ad placement. I have to decide between three media that will best target our audience.

Broader reach.

I would need more money, and that's not going to happen. There's nothing they can do to make me more money.

Something that nobody would give you. A guarantee that they could put people in the store. What works best for us is a good mix. We put the budget into one area, and that doesn't work well. It doesn't matter which one as long as it's a mix.

Competitive packages. Giving a retailer a discount on their packages.

Either larger coverage area or a lower price.

Someone telling me they've seen my commercials.

Would have to buy another company and have better coverage.

The state would have to fund higher education more.

Broader coverage. I do local news, and it gives me a wider range of people.

Proof that advertising with Adelphia would drive customers through the door.

I would say increase of networks that there are.

A little more controlled environment.

It has to do with how much the client chooses to spend, so I have to use Adelphia.

They would have to open a store in that coverage area.

Networks that were more geared toward demographics, where we could say that this is our market. There's never a clear-cut program for that. If there was a specific program geared toward seniors, I think that would do it.

I need to use the DSL. I haven't seen a sales rep yet.

Move into our market. When we are choosing ads, it's based on what the client wants.

I wouldn't. It's a money issue. I don't have any more money to put into TV advertising. Our dollars are better spent into other advertising.

Very-well-honed project already and it's a finite promotion.

I would have to see results in the money.

We're a nonprofit organization. We would need grant dollars.

I do major planning when it comes to marketing, and it would all depend on if I could fit an increase in.

Better ratings within the target area.

More feedback.

I'm not interested in doing anything on cable now.

For what I'm doing they just aren't the right medium to use. Fragmentation is a problem with using cable, and the value isn't quite as good.

I would have to see an increase in their service with their clients. Their clients are my clients.

Actually there isn't anything. It's moneywise only.

We are getting what we want right now.

If I had more people tell me they saw the ad. I ran two ads in the newspaper last week, and I got more business from the paper than from the cable TV.

If my response said specifically that they were seeing everything on TV.

Probably a promotional package.

My client to want to do it...

More volume...the more gross will increase profits.

Better ratings.

Cheaper production. The production costs, basically getting it on the air, costs so much.

I need some customer service involved. They need to sell their time because they're wasting their time.

More resources from clients. If they increase their total investment in advertising, then I would increase my total investment.

Super rates and a sharp salesperson.

An increase in clients for us, more business. (2 occurrences)

They need to show that the campaign is working. I need one point of contact that can buy any cable system in the U.S.

New product.

Patients go down...we are not doing as much business as before.

Increase the budget for membership.

If they said to me, "If you advertise with us, then we will only charge you a percentage." The production quality of the commercials in my location, Martha's Vineyard, are really bad. The production services are terrible and

I have to do the commercial formatting myself.

Nothing. I'm not interested in (an) increase of investment; I'm satisfied with the current level.

More money and a higher concentration of Adelphia subs in my area...

The experience I have. The commercial ran for eight months and the ad never was changed. The person who had my job before me did everything, but the cable TV didn't work for us so we'll probably go back to local.

Never gave that a thought. I have budgeted for a year, so I don't care what happens.

Don't know for sure. Adelphia market is not our target of people.

There is no need to justify an increase with Adelphia.

Cover a wider market. Geographic area twice the size.

I don't throw my money away.

Some kind of incentive.

Nothing. I'm happy with the radio people.

I have no say in that matter.

They would have to show me I could reach more people with them.

I don't think there is anything, because things are going very well now.

There would be nothing they could do because they do not do business here anymore, they were bought out.

We are waiting for the market to turn around so we can have the available funds for advertising.

Unless you do it for me free, we are just doing a different campaign.

It's not a huge urban area. Increase in income here, our sales would have to be higher.

Better deals and promotions.

Probably more value for the time. The increase in the business.

Increase in the households and viewers.

A better return on the dollar. The amount of money has decreased that I have received. I think it is because a lot of consumers have

satellite dish and don't get cable. My target audience uses the satellite dish and don't get cable.

More people coming to the store from the target area.

Need a better deal than the current one.

Better service. Not in the sales rep but as in more personal response to my ad placements. I want them to care. It used to be two years ago that my ads were inserted locally, but now the ads have to go to another city to get inserted into the lineup there. They don't care about us from the next guy.

It's the economic issue to justify whether the funds are there or not.

Better service on the Power Link side of it.

Lower cost of production.

Increase my sales. Make my business profitable.

What I'm doing with them is fine. I don't need anything to justify it.

If I could see better production, which is not done by Adelphia anyway. They are not as great as they could be if they put their brains together. The better the production is, the more the people will look at it.

I am a small business, and I used to spend a lot of money on advertising and didn't see any results. One concern that I do have is that more and more people are switching to satellite and so they won't see our ads; and therefore we have no reason to waste money to increase an investment that we won't be satisfied with.

Addressing my needs, not theirs. Ability to give me ratings like broadcast and an outstanding sales rep.

Probably more subscribers. I compared it with similar servers, and they just don't have as many.

I don't know; everything is going well.

I need to find out what service you have because I'm new.

They would have to come to town.

I would have to see what product they have out there.

An increase in our advertising budget, maybe 5% increase in advertising budget.

Better service. Why would I spend money if it doesn't work like it should?

A little more accuracy and attention to detail. They have wrong prices on the houses.

I don't need the advertising that much.

Nothing; I just don't have the need to increase right now.

It's a matter of convincing the owner to make that decision.

I need an increase in funding and a convincing argument that media will in fact sell our product.

I'm not sure anything would work unless the dollars per ad dropped.

Nothing; it doesn't fit my business.

Something that would prove it would increase my business. Some involvement covering events.

The shows that the agency puts me on are not the most watched ones; we need to get on better stations. My commercials are not in the top 10. Adelphia needs to talk to my agency.

If my clients would have more locations in Adelphia markets and if they lowered their spot costs.

An increase in advertising budget and definite proof that I would make more money.

Broader range within the market, instead of just one area.

Better services, newer services.

The target audience, the numbers of viewers and what you get for it.

To be assured that the response would be what we expected.

Thirty to 40 more students.

More subscribers, more audience.

It would need to be an extension of our business.

More people coming in. The advertiser would have to bring them in.

Better rate for smaller business so we could do more.

A discussion with a sales rep. The rates would be a factor as well. The presentation of the sales rep would have to be good. The information they give would have to be descriptive. I would like frequent contact with them. Showing me that they are interested. Like when something goes wrong; or if something is going well, I would have to see if it was worth my investment.

We're just not planning on doing that now.

Improvement in production and in results.

Someone getting in touch with me; they have not called in over a year. They accused a friend of mine of doing something that she did not do. I wanted to know if they have a wireless network in my home area.

A greater response from the consumer, like what brought them in to our dealership.

More revenue coming in. More house buyers.

If they get it done immediately...if they get stuff done faster.

I'm just not investing with them period.

Better business. Cable is expensive for a small store.

A different cable company.

Need more people buying at our pawn store.

I'll never use Adelphia again.

Better service. My market is not their market.

More services.

They're not in our budget. We're not going to use them again.

Increase of business. We increase every day without it.

More direct response from my cable advertising.

At this time we have no plans to increase our investment.

More traffic sales and cheaper rates.

Big bag of cash.

Better service.

I don't want to spend any more money on advertising.

Interest from the sales rep, that they want my business and can show me facts that will help my business. Even with no TV this year my sales are better than last year with TV.

More people coming in.

A chain on whoever handles their accounts.

It's too costly.

To know we could pay the bill when it needs to be paid.



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